

THE KEY TO INCREASED SELF-SERVICE ADOPTION

Turning the Self-Service
Portal into the Most Valuable
Employee Resource



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The Challenge

Most IT departments already have a self-service portal, but they struggle to get the employees to use it. For various reasons, the employees continue to call or email the service desk whenever they need help from the IT experts.

That is a shame because the self-service portal offers many advantages for the employees and the IT department. For example, employees can use the self-service portal to submit requests 24x7. They can also use it to track the progress of these requests. More importantly, they can find the answers to frequently asked questions on the self-service portal, allowing them to help themselves, even when the service desk is closed. This is not just a benefit for the organization's employees; it also represents a significant reduction (realistically between 10% and 30%) of the number of submitted requests. In turn, this means fewer analysts are needed to staff the service desk.

So how can an IT department get its employees to stop using the phone or email and start using the self-service portal? The first step is to make sure that the portal meets the minimum requirements for usability and efficiency.

A Minimum Self-Service Solution

The IT departments that have already set up a self-service portal for the employees they support have learned that there are some minimum requirements that need to be met if they want at least part of the workforce to use it.

Single Sign-On

Users don't magically start working in the most efficient manner, especially when the first step is cumbersome. If people have to sign in to the portal with a username and password, they will likely decide that it is easier to pick up the phone or type a quick email.

Ease of Use

The portal's interface must be intuitive and require no training, even for inexperienced users. It also needs to be very responsive (fast) to avoid users getting frustrated.

Forms for Standard Requests

Having forms for standard requests within the portal is vital. These will let users submit their requests more quickly by offering a few checkboxes or fields showing only relevant choices. These forms also allow the IT department to collect precisely the information they need to complete the requests, avoiding the time-consuming effort of having to contact the requester for missing data. Better still, forms can make sure that tickets are passed directly to the right support team, thus bypassing the need for the service desk to be involved. And ultimately, the structured data that these forms demand allows for a fully automated handling of the requests. Using forms for standard requests, the requester gets what he or she needs more quickly.

FAQs and Knowledge Articles

Answers to frequently asked questions and knowledge articles with easy-to-follow instructions help users help themselves. Knowing that they no longer depend on others to resolve their issues encourages them to use the system more often and reduces the service desk's workload.

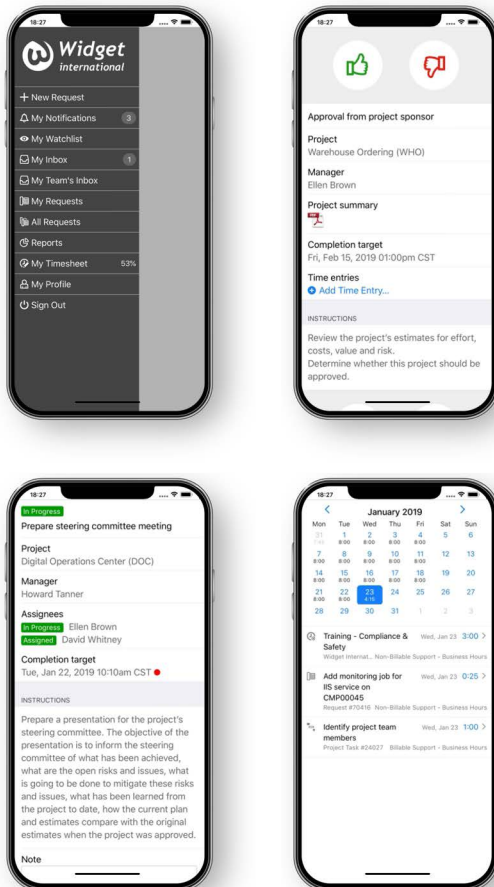


Smart Search

A basic search capability is standard in almost all software interfaces these days. But for the user to receive only relevant information, this search function needs to have some intelligence. It needs to know which services are used by the person who performs a search, limiting the results to the standard requests and knowledge articles for these services. Ideally, the portal also allows the support organization to analyze the executed searches. If a user did not find the standard request or knowledge article they were looking for, it should be possible to teach the portal so that the next time someone executes a similar search, they do find it.

Smartphone App

Since people are spending more and more time on their smartphones, they should also be able to use these devices to access support. Users do not always want to wait until they are back behind their laptops to submit a request. Not having a smartphone app would encourage them to use their mobile devices to call or email the service desk.



Unleashing the Full Potential of Your Portal

Having a portal in place that meets these minimum requirements will cause a reasonable percentage of the employees to prefer it over contacting the service desk by phone or email. Getting up to 40% is not unusual, but it depends on the intuitiveness of the portal's interface, as well as the quality of the knowledge it provides and the usability of its forms.

To an IT director, getting to a significantly higher adoption rate may not seem realistic, but it is actually surprisingly easy. The trick is to look outside the IT department.

A recent study by Enterprise Management Associates (EMA)¹ found that IT benefits when the use of their self-service portal is extended beyond IT. When IT allows other enterprise functions (such as HR, Purchasing, Facilities, Global Marketing, Legal, etc.) to offer support to the employees using this portal, it dramatically increases the use of this portal for obtaining support from IT.

In hindsight, this seems obvious. After all, if people only need the portal once or twice a month when they need some IT support, they never really get comfortable using it. Even with only one additional support domain (most commonly HR) on the portal, the IT department sees a drastic uptick in the use of self service for IT requests, according to the study.

Several other benefits are highlighted in the study, encouraging organizations to use the self-service portal for more than just IT support. These benefits include improved collaboration between IT and other enterprise functions and an increased willingness of the business to further invest in the portal's usability.

Because most self-service portals are built on an IT service management (ITSM) platform, EMA now sees these platforms, as well as the service management principles they support, used well beyond the IT department's boundaries. This trend from ITSM to ESM (enterprise service management) is what EMA calls: The (r)evolution of ITSM.



Important Considerations

Before encouraging other enterprise functions to also make use of the ITSM platform that the IT department is using, there are a few things to consider.

In an enterprise-wide deployment of the service management platform, the self-service portal should be where employees go when a light bulb needs replacing in a meeting room, when access is needed to a shared drive, or when a contract from a supplier needs to be reviewed. Employees should not need to know who, or even which department, to contact with such requests. But the engineers in the Facilities Management department probably do not want to see the requests intended for the IT specialists, and the IT specialists probably should not see the requests intended for the legal department. For HR requests, separation of data is essential since employees share a lot of sensitive information in such requests and must rely on the portal to keep their data private. Not all ITSM platforms make it easy to set up a single portal for all employees of an organization that strictly segregates the requests of the different departments.

Another important consideration is that each department will have different needs and will want to configure the service management platform differently to ensure that it meets these needs. The IT department may have many requirements for managing its assets, while the HR department will be more demanding when it comes to the setup of their knowledge base. In larger enterprises with IT or HR departments in different countries, they will notice that each country will have slightly different requirements for the configuration of their service management environment. For these reasons, the setup of the current ITSM tool is unlikely to meet the needs of the other departments that may be interested in using the self-service portal.

Consolidating Enterprise Collaboration Needs

4me is architected to address these requirements. The innovative use of a directory account and support domains² gives each enterprise function the ability to set up its own service management environment, making it possible for one support domain to tweak its settings without affecting the others. No matter how much the support domains customize their 4me environments, they continue to be able to collaborate securely and seamlessly with each other.

SOURCES:

1). ESM: the (r)evolution of ITSM
 Author: Valerie O'Connell, Research Director
 at Enterprise Management Associates (EMA)
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2). Introducing Directory Accounts
 Author: Cor Winkler Prins, CEO at 4me, inc.
 Published: July 07, 2015



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