

Is Self-Service Serving Its Purpose?

Part one of a two part series



About the author

The author of this report is SDI's Industry Analyst Ollie O'Donoghue. Ollie is dedicated to providing insightful and practical research to the service desk industry. Ollie's work with a wide range of service teams around the world provides him with ITSM expertise across a variety of business sectors.

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Contents

Introduction

Self-service

Self-service: organisations that have implemented the solution

Self-service: organisations that have not implemented the solution

Conclusion

About Ivanti

About SDI

Introduction

For several years, self-service has played an integral role in the support structure of the modern service desk. Despite this, the value that this technology offer is not yet fully understood. There are common industry challenges associated with self-service – for example, changing customer habits – that severely impact upon the value that organisations can deliver.

The motivations that drive an organisation to implement self-service and self-help technologies vary considerably. Nevertheless, understanding commonalities between them is vital to understanding both the industry’s perception of these tools and how they gauge return on investment. Self-help will be explored further in part two of this two-part report.

This report seeks to shine a spotlight on self-service by analysing the motivations of the organisations that implement it, understand the challenges they have faced, and what benefits they achieved at the end. Furthermore, it seeks to understand the ambitions and plans of organisations that are yet to embark on their implementation journey and analyse the obstacles that are inhibiting their progress.

The research survey was circulated to over 25,000 service desk professionals, providing a sample that is reflective of the diverse makeup of the industry. Where possible, the results of this research will be compared and trended against the findings of previous research conducted in 2013.

Self-service

In recent SDI research, the popularity of self-service can clearly be seen, with a significant portion of the industry using the technology. Furthermore, the same study revealed an understanding that it will need to be used more in the future to meet customer demand. Undoubtedly then, the role of self-service needs further investigation to understand if the considerable portion of the industry that has implemented the solution have achieved the objectives they set out with and, if not, what got in the way.

Who is using self-service?

Are you currently using self-service?

2017

Yes 74%

No 26%

2013

Yes 64%

No 26%

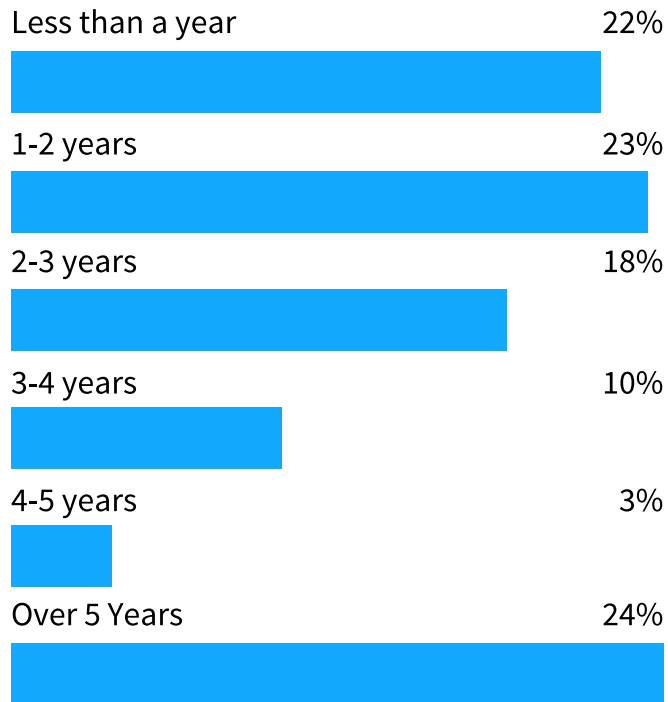
With just under three-quarters of the service desk industry revealed as currently using self-service, this research is consistent with the findings of other research published by SDI. Furthermore, when compared with research conducted in 2013, there are signs of considerable growth, moving from 64% of organisations offering self-service to 74%.

Self-service:

Organisations that have implemented the solution

Beginning with the 76% of the industry who have implemented self-service, this research will analyse a range of important factors from the number of motivations met to accessibility on mobile devices. However, the first step is to understand how long self-service technologies have been in place in respondent organisations.

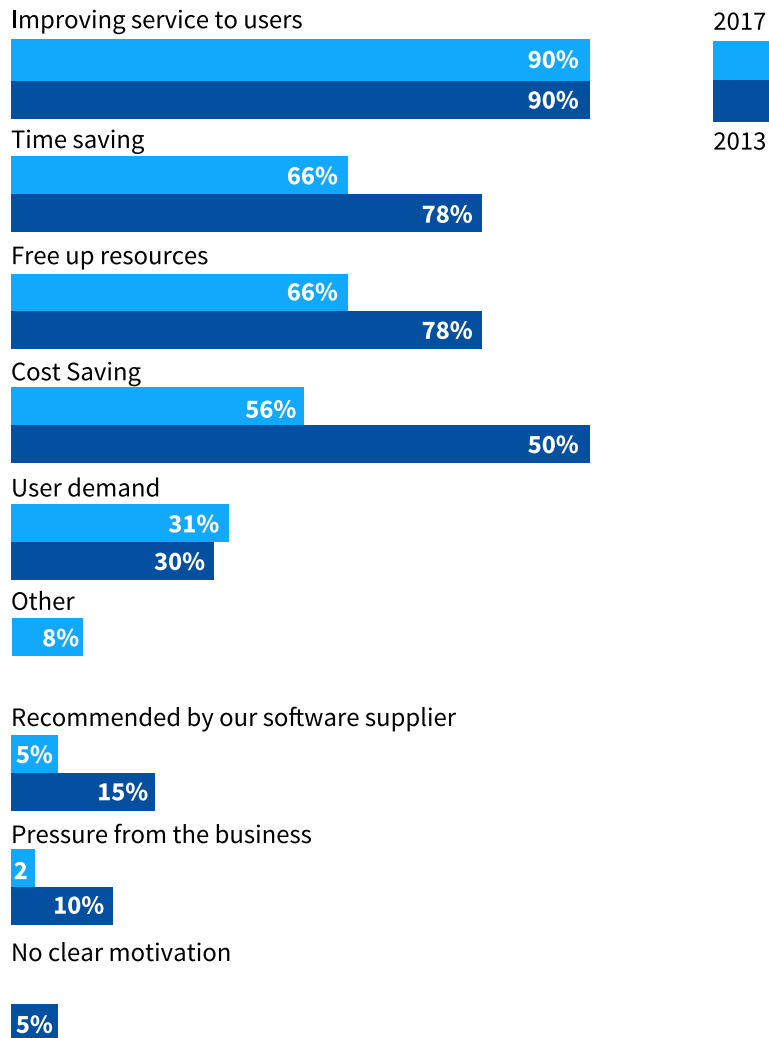
How long have self-service solutions been in place?



While not the only measure of a tools maturity, age is a valuable indicator and is particularly useful to understand how long organisations have had to realise their objectives. 55% of respondents advised their solution is over two years old – of which 24% are older than five years – providing a sample of the industry that has allowed for a reasonable amount of time to realise their implementation objectives. Furthermore, only 22% of the sample has a tool less than a year old, a segment that is unlikely to have achieved the full benefits of a solution embedded into their support structure.

Motivations for implementing self-service

What are the primary motivations behind implementing self-service?



Establishing the initial motivations service desks have for implementing self-service is critical to understanding the perception of the technology and matching up motivations with achieved benefits. Positively, the strongest motivation for implementing self-service is to improve service to end-users with 90% of respondents advising that this motivated them. The second and third most popular motivations demonstrate a clear perception within the industry of what self-service can offer. 66% of respondents advise that saving time and freeing up resources were the driving forces behind their implementation. Meanwhile, reducing cost – a common motivation for new technology implementations – motivated 56% of the respondents.

Although cost reduction is a key factor for over 50% of respondents, there is a notable gap between those who wanted to reduce cost and those who sought to free up resources and time. This indicates that many in the industry understand that new technologies do not simply offer opportunities to save money but also provide professionals with the chance to reduce time-drain activities and concentrate resources in more valuable areas of the support structure.

User demand is a key motivation for only 31% of respondents, signalling the foundations for a potential obstacle further into the implementation journey. Without support and demand from customers, organisations may struggle at first to encourage user adoption.

Motivations for implementing self-service

Verbatim responses captured in the “other” category cover a range of themes that sit outside of the broader categories. The most commonly cited include a concerted focus to reduce emails, improve the perception of the service desk and combine disparate support tools into one self-service portal.

Interestingly, motivations have changed relatively little since the first study, with the order of priority remaining similar. In 2013, the top three motivations were also improving service to end users, freeing up resources and saving time. The only notable difference is a decrease in respondents motivated by vendor recommendations, decreasing from 12% to 5% four years later.

Unfortunately, the majority of respondents were not able to meet all of their motivations. The largest segment of respondents, representing 63% of the industry were able to meet some, but not all of their objectives.

There are three key areas worth exploring when drawing inferences into the potential causes of this result. Foremost, the disconnect between perception and reality may have roots in unrealistic expectations from the outset - potentially driven by sales and marketing materials during the procurement and implementation stages.

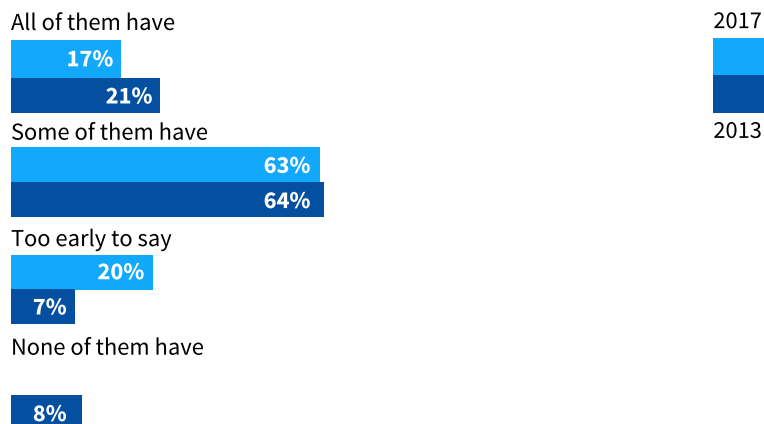
The second is that the respondents appear to have a broad range of motivations – as can be seen in the previous graph – which likely resulted in them concentrating on the most important motivations and allowing the secondary ones to lapse.

Equally, there is the third possibility that the technology just failed to meet the expectations and needs of the organisation – a prospect that will be explored further in this report. Positively, however, no respondents advised they had failed to meet any of their motivations, and 17% advised they had met all of them.

When compared to the original study carried out in 2013 there are both positive and negative signs. Four years ago, 7% of respondents failed to achieve any of their objectives, an encouraging signal for the increased return organisations are achieving today. However, this is balanced by 21% of organisations achieving all of their motivations in 2013, compared to just 17% in 2017.

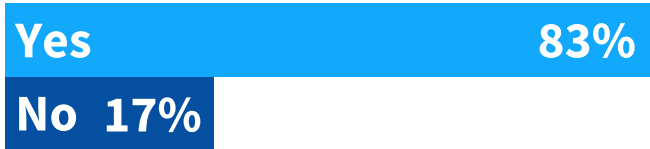
Meeting the motivations

On the whole, have these motivations been achieved?



Meeting the motivations

Do you users prefer to call you instead of using self-service?



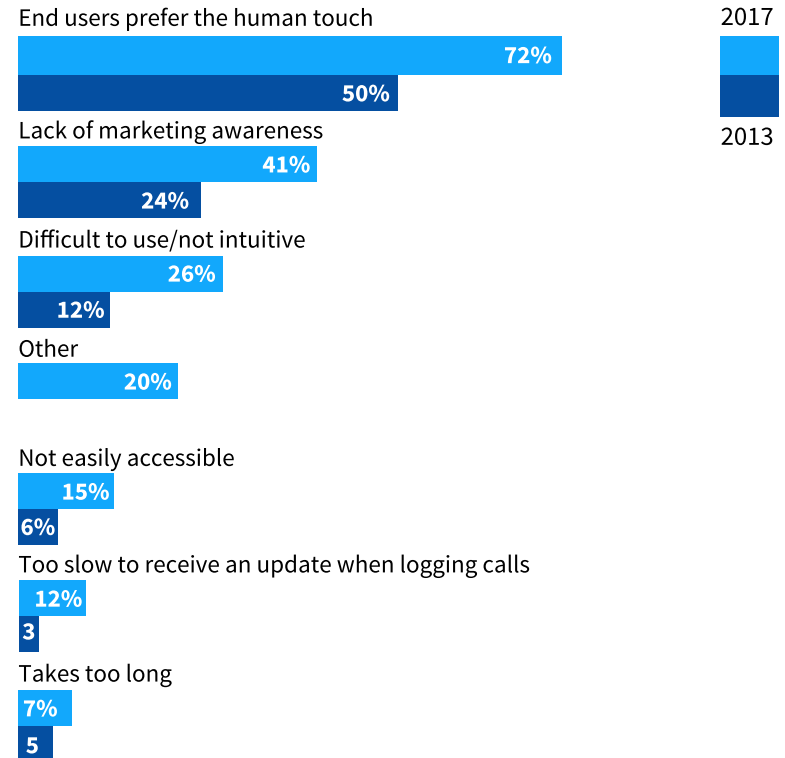
Undoubtedly the success of a self-service tool is the extent to which customers adopt it, particularly when the top motivations of industry practitioners are to save time and free up resources.

A key way to meet those core motivations is by ensuring the self-service solution provides customers with a channel that is efficient and at least equal to others in the support structure. Often factors like speed and reliability damage the perception of a self-service portal, severely damaging both customer perception and the solution's return on investment.

It is of concern, then, to see such a small portion of the industry offering a solution that is preferential to customers.

Biggest challenges

What are the biggest issues with self-service from the perspective of end users and the business?



With so many organisations failing to meet all of the objectives and motivations they set out with, it is vital to understand the obstacles they faced in their implementation journey. Perhaps an unsurprising result given the findings of the previous graph, the greatest challenge faced is that end-users simply prefer the human touch. A trend that often inhibits the adoption of non-traditional support channels, over 70% of respondents advise this is a challenge they are facing.

Biggest challenges

The second most common hurdle relates to the lack of marketing awareness in the organisation which is inhibiting the ability of professionals to build an understanding of the role and value of the tool to customers. Undoubtedly, this challenge is a contributor to the broader problem of customers preferring to call the service desk directly. If customers are unaware of the tool, or the outcomes it delivers they are unlikely to use it.

26% of the industry face challenges with the design of the tool, of which the most commonly cited aspects are poor user interface design and restrictive workflows. With the latter turning customers towards the path of least resistance which is often to phone the service desk directly. Building a self-service portal that is intuitive and easy to understand is critical to driving customer adoption and building customer loyalty. If a tool is challenging to use, customers who may have tried it once are unlikely to return to use it again. Worse, they are also likely to discourage other customers from using it as well.

The other category captured some of the verbatim responses that did not fit in the broader groupings. However, the majority centred around challenges with perception, for example, customers viewing self-service as a low priority channel, or one for routine requests. Some responses went further and acknowledged that some customers are confused as a result of poor communication and marketing efforts.

Similarly to the motivations section of this report the obstacles faced by organisations four years ago remain broadly similar. Notably, the gap between the greatest obstacle – end-user preference – is more pronounced in the 2013 study.

Can end users access self-help through mobile devices?

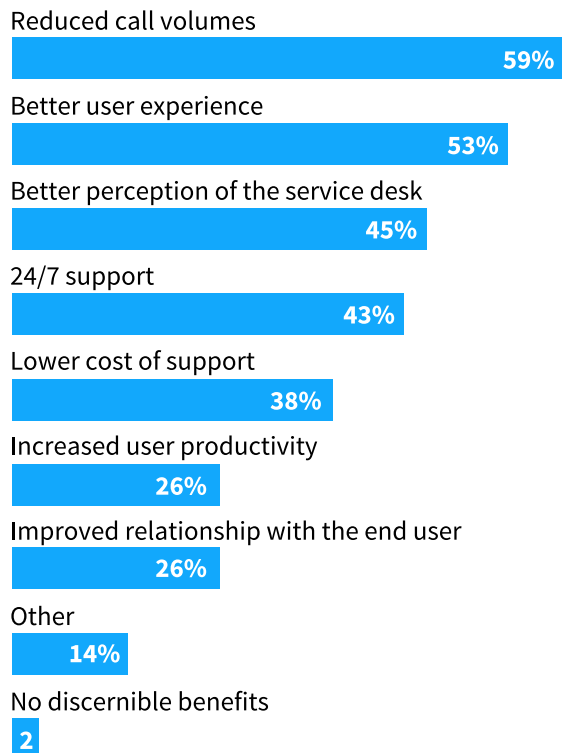
Yes	50%
No	50%

Most modern technologies also carry with them some expectations around accessibility. In the case of self-service, the trend extends to the capability of customers to access the tool through mobile devices. Of the organisations that provide self-service options, half have the functionality to extend access to the resource to mobile devices.

Customer expectations will likely lead to greater demand for support resources to be accessible to a broader range of devices and systems. It would be reasonable, then, to expect the percentage of organisations offering mobile access to increase as the technology develops.

Benefits of self-service

What have been the major benefits of self-service?



Analysing the benefits recognised by professionals and, where possible, matching these with the motivations discussed earlier in the report will serve as the final method of assessing the success of current self-service implementations.

Encouragingly, reducing call volumes is a benefit recognised by the most respondents, linking up to two of the key motivations established earlier in the report – freeing up time and resources.

Similarly, delivering an improved customer experience was the top motivation for service desk professionals and is a benefit recognised by over 50%. It would be reasonable to suggest, at this stage, that freeing up time and resources and improving customer experience are the most likely motivations to be met for organisations embarking on a self-service implementation. Professionals that embark on a self-service journey seeking to drive down costs have a significant chance of doing so, with 38% of respondents advising this was a benefit they achieved. However, the evidence suggests that lowering cost is a side effect of other motivations – such as reducing calls to the service desk – rather than the core driver of successful implementations.

The benefits captured in the “other” category varied considerably. Several respondents cited the increased consistency of ticket information supported by structured forms to obtain necessary information. Furthermore, some respondents carried this theme further by recognising the improved data collection benefiting problem management. Finally, the automated approval process and the subsequent reduction in routine and manual authorisation activities is a key advantage for multiple organisations.

Despite an overall positive match between some of the key motivations and the benefits recognised by service desk professionals, it is notable that 2% of respondents have advised they are yet to see any noticeable benefits. Perhaps less surprising given the obstacles identified earlier in this report it is nevertheless a disappointing sign of a lack of return for a considerable portion of the industry.

Self-service:

Organisations that have not implemented the solution

The second half of this report on self-service focuses on the 26% of organisations that have not implemented a solution. The research asked questions about important factors such as ambitions and plans to implement, and the major obstacles that have got in the way.

Do you want to implement self-service?



Further cementing self-service solutions as a vital pillar of the modern support structure, of the 26% of organisations who have not implemented a solution the vast majority have ambitions to in the future. When asked “do you want to implement self-service?” a resounding 94% answered yes. The study conducted in 2013 also concluded that the majority of service desk professionals had ambitions to implement self-service with 83% of respondents advising this was the case. The considerable increase over the four years adds weight to the argument that self-service is becoming an essential part of the modern support structure. A desire to implement self-service is admirable, however, it is important to understand how this translates into actual planning.

Is there a plan to implement self-service?

2017



2013



After establishing a desire or need to build a self-service offering into the support structure, the next iterative step is to develop a plan. Without a plan to implement, it is unlikely professionals will be able to progress further on their journey. As a result, it is an important measure of an organisation’s real ambitions to adopt the technology.

It is somewhat disappointing, then, that of the considerable portion of the industry that would like to implement the solution, only 61% have a plan to do so. Often, service desk professionals understand the value a new tool or technology will offer but are unable to articulate its value to customers or the business. Many other obstacles can stand in the way of service desks implementing self-service. Some are possible to overcome with time and resources while others, like a lack of customer and business demand, can bring ambitions to a dead end.

Nevertheless, the percentage of organisations that do have plans to implement self-service since the first study has increased considerably from just 47%.

Self-service:

Organisations that have not implemented the solution

What are the biggest obstacles to implementing self-service in your organisation?

Time

50%

Lack of appetite from end users & the business

40%

Not currently in a position to implement

30%

ITSM tools lack functionality

27%

Budget

23%

Other

23%

No clear understanding of how to implement

13%

No clear benefit

10%

Calculating the return on investment

3

The most common obstacle faced by service desk professionals seeking to implement self-service is time. For many service desks, time is a scarce resource and one that is challenging to allocate to other projects. It is unsurprising, therefore, to see this cited by 50% of the industry as one of their greatest obstacles.

Significantly, a lack of appetite from end users and the business is the second most common barrier, cited by 40% of the industry. Clearly, there are challenges for both those who have and have not implemented the tool in driving demand through marketing and promotional activities. On either side of the coin, the lack of demand is a major challenge – leading to adoption issues in those who implement a solution without a foundation of user demand and halting the journey entirely for others.

A key theme emerging in this section of the report is the opportunity for vendors and practitioners to work together on building dynamic self-service capabilities. For example, 13% of respondents advised they do not have the understanding of how to implement a solution – a knowledge gap that would undoubtedly be filled by an experienced vendor partner. Similarly, 27% have advised that their current ITSM tool is not capable of providing self-service despite a clear ambition from the organisation to implement it. Again, a suitable vendor partner should work with these organisations to configure a tool that meets their goals.

The value of self-service tools is undoubtedly known to service desk professionals – a prospect also confirmed in earlier findings of this study – with only a small percentage of respondents advising assessments of returns and benefits had halted any further exploration of solutions.

Finally, the contents of the “other” category reveal the variety of obstacles faced by service desks. An obstacle cited by multiple parties focused on the immature processes and documentation the service desk is currently working with, presenting shaky foundations for a self-service solution without more work. Indeed, many of the additional obstacles captured in this research reveal concern amongst the industry that their operation and resources would severely inhibit the success of a portal, leading them to put off implementation until the situation had improved.

Conclusion

If this research has confirmed one thing, it is that the value of self-service solutions is known to service desk professionals. However, this often does not translate into user and business demand, causing considerable obstacles for organisations trying to build stronger adoption rates and those seeking to embark on their journey.

As the study progressed a theme began to emerge: many of the obstacles faced by service desk professionals are reliant on experienced vendor organisations building partnerships that seek to build dynamic self-service solutions. For example, overcoming many of the barriers revealed in this research is reliant on marketing and promotional activities. Yet, a fundamental challenge in itself is the lack of marketing awareness amongst service desk professionals.

Furthermore, challenges with building responsive and intuitive portals that customers will want to use are reliant on the solution that the vendor supplies. Developing tools that meet the needs of service and support organisations is vital to the future success of all parties, and yet, many of the factors eroding away at the value of the solutions represent a transactional approach to procurement.

Service desks that are armed with the experience and knowledge of a vendor organisation, and supplied with tools that meet their needs and ambitions, will undoubtedly overcome the myriad obstacles facing the modern service desk when it comes to successful self-service.

About Ivanti

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For more information please visit www.ivanti.co.uk

About SDI

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Embrace:

To raise the quality of service delivery by valuing best practice

Engage:

To create an inspiring and engaging customer experience

Invest:

To empower their teams to be inspired, take action and be better

Shine:

To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery. For more information about SDI please visit www.servicedeskintstitute.com

