MEXON TECHNOLOGY

EXCELLENCE in Service Management

What to consider when implementing a Self Service Portal

A WHITE PAPER BY MEXON TECHNOLOGY

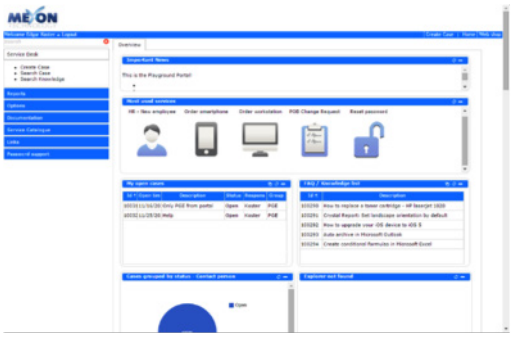
1. Introduction

The world of Service Management is, as ever rapidly changing. The IT Service Desk used to be the first point of contact for all (ICT-related) questions and issues. Today, customers and employees want to increase their speed of operations by getting around a time-consuming human interface; that is the IT Service Desk. And of course, everything should be done online, from any device, anytime and anywhere. To make a long story short employees and/or customers demand Self Service!

Self Service is growing strongly.
You can think of functionality like:

- Submitting and tracking (status) of personal inquiries, requests, orders or even complaints
- Downloading or consulting documents and information, like procedures or instructions
- Ordering and approving the necessary IT resources to be able to do your job, such as a laptop, phone or software
- Keeping up with relevant (ICT) technology news
- Registering a new employee (HR)
- Consulting FAQs
- Chatting online with a support engineer

Through the seamless integration of the Self Service Portal with your ITSM and other back-end systems, all information can be retrieved, displayed and stored completely and safely. ITSM processes can be executed in optimal performance by eliminating errors and optimizing the allocation of IT resources and enhancing the quality of your services to the business.



Setting up a proper Self Service environment requires careful preparation. Understanding the key principles in advance increases the end user acceptance and success of your Self Service implementation. The first, and probably the easiest, thing to determine is whether your organization provides services to internal customers (colleagues) or external customers (clients) or both. This aspect affects the user experience in a crucial way and has great influence on your project.

This White Paper discusses topics which need your attention and explains why they need your attention before you start with the implementation of Self Service. These topics have been grouped in preparation, initial project phase and others. Although these are not limitative, and other items could be important as well, we believe that all of the ones mentioned in this white paper belong in all Self Service projects.

2. What questions to ask yourself initially

Any of the following questions, or better yet the answers to these questions, can and will create a different end result of your portal project. Doing a Self Service implementation without asking, and confirming the answers to these questions may lead to a project which is likely to get in trouble because the scope and/or content changes and probably will take much longer then desired.

1. What is the main goal or expectation of the customer?

Increasing speed of ordering (and delivery) of IT resources and incident resolving. 24*7 access, independency (from the IT department), etc.

2. What is the main goal for the IT department?

Reducing resources (IT Service Desk Personnel), decreasing input errors, increasing the level of automation of IT actions leading to reducing time-to-delivery.

3. Whom are we going to provide services to? Only internal services (and insights) to our colleagues or are we providing external Services to our (external) customers or both?

If your organization provides services to internal and external customers you have to consider the implementation of two separate Self Service portals. When implementing one portal it is crucial to be able to differentiate between internal and external parties. Not only the products the portal serves and delivers may be different, but also the service levels.

If you are, for example, a software manufacturer, your end-customer will probably use Self Service for issue reporting and tracking. This reporting and tracking will usually only pertain to the product you deliver and not to other 3rd party products you do not service and deliver. You may want to allow an internal user to request a new PC, whereas you would not provide this opportunity to external customers.

4. What type of security is needed?

Although security is accomplished by technical solutions and is the domain of experts, it is essential to have a good understanding of the impact of security measures before implementing them into Self Service, or a part of it. Maybe you need authorization on certain content parts only. Usually there are special facilities needed to provide access to users/customers who reside outside the boundaries of your network to Self Service.

The (technical) possibilities of creating a secure environment are endless. It is necessary to ensure that the solutions are in alignment with company regulations and policies. If your portal is about to go live but the users have no technical access due to security reasons you may find your project a bit delayed.

5. What languages will be used?

It seems obvious that users will want to read everything in their own language. Make sure you understand in what areas language may be an issue that has to be addressed. First of all it is necessary to determine if your portal is technically able to supply an interface in more than one language (depending on user preference) and if you (or your organization/department) want to serve your customers in the language of their choice (instead of your preference or standard) .

Language issues can be divided into the following areas:

1-Languages of the portal itself (menus, labels etc.)
2-Languages of the portal's content (descriptions of services, questions and answers in questionnaires etc.)
3-Languages of messages which are sent to the user and triggered by usage of the portal.

Number 1 is the most obvious and usually easiest to address.
Number 2 is a tricky one. If the portal does not allow for multi-language entry of descriptions you may learn that you need certain things in more than one language.
Number 3 is an interesting one. If someone uses an English language portal does that mean the choice of language of this person is also English for e-mails? What do you want to deliver? Keep in mind that the maintenance of each language is a task you need to complete, also for e-mails.

6. What type of devices do you expect will connect?

The appearance and ease of operation of a Self Service portal has a strong link with the type of devices that are used by the users. If both desktop users and mobile users have to be supported you need to address the issues that come with that. Mobile devices have a different screen resolution, which may lead to dedicated window handling or design.

Are you going to pay special attention to mobile devices or are we assuming they will use their browsers to get access? Browsers on mobile devices are for sure not 100% identical to desktop browsers and this may lead to usage issues later on. This will also mean that you need to decide to what level responsiveness has to be used.

7. Which kind and versions of browsers do you expect?

Although this may seem like a strange question, does not the technology work in all browsers you may think, but it is not. Bigger companies have good reasons to run out-dated versions of browsers. This may mean that your users will try to use your portal with a browser which is incompatible with the version required for your portal. You need to know this up front and try to understand what the impact will be. Delivering a portal which functions in the latest MS Internet Explorer version, but has some quirks in version 8, is not uncommon.

8. What Services will we provide?

Self Service is a broad term covering many things. Are you considering first only the tracking of inquiries to provide insight? Will the user be able to report issues? Will the user be able to request things (materials, services or access to software or other resources which may even reside in other systems like for example SharePoint)? The scope of your project will change a lot based on the answers to these questions.

9. Who are 'we' actually?

Usually, Self Service projects are run and triggered by the IT Service Desk (servicing end-user). This automatically seems to limit the scope, but there is a potential for immediate optimisation. It may very well be that there are other initiatives from other departments like Facility Management.

Generally, it will not be a good idea to offer users multiple portals where they can order stuff or report failures. When it comes to facilities it is currently difficult to determine in which domain something belongs. Just take a simple example like a beamer which hangs in a training room. 50% of the companies will put this in the Facility domain and the other 50% in the ICT domain. Why should a user know all this? If it does not work, reporting it to a central point seems to make sense.

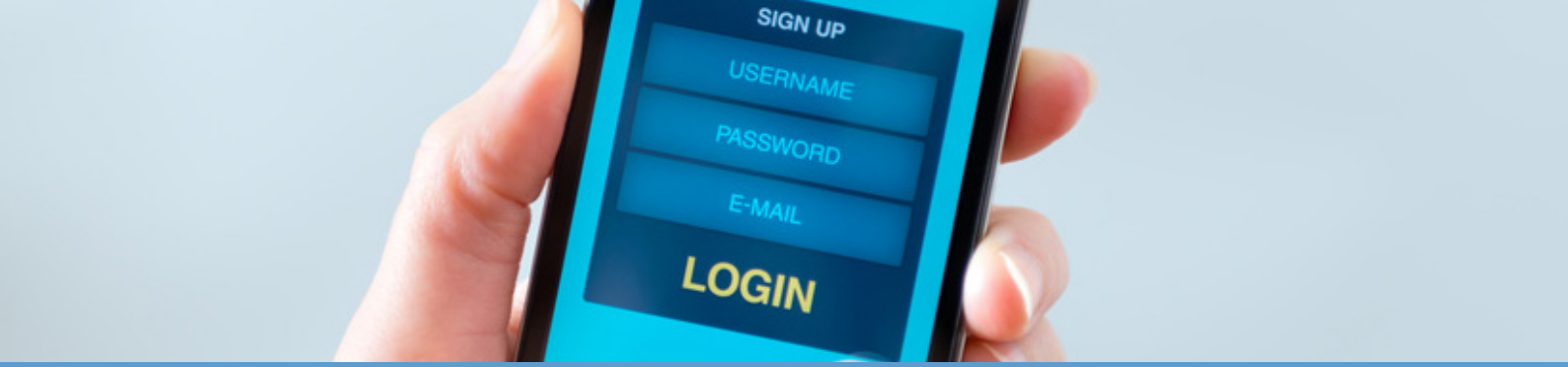
10. Will the Self Service portal need to trigger automated activities?

If an approved Self Service request should automatically give someone access to something or install a bit of software it may be good to understand as early as possible how this is achieved. It does happen that IT Architects provide information on how to achieve this automation in theory but that it is actually new to the other IT people. At the end it could be your project that has to determine and implement the automation of delivering the orders/purchases that are made available on the portal.

A topic like this tends to be accompanied by discussions where things like "I thought it worked that way" or "In theory…." are not uncommonly heard of.

11. Do the offered services have an (automated) workflow in your ITSM tool?

When your solution is able to reduce the time of sequential activities by automating the flow of actions (for instance the approval of a manager or the delivery of software) it will increase the satisfaction of the customer.



3. What topics need attention immediately at the beginning of the project?

In the beginning of the project when you have all the information you think you need, you will quickly learn that some things which seemed to be easy and available are actually not available at all or do not exist in the form your project requires. This section provides an insight to what these things may be.

1. Manage expectations

Although Self Service has a lot to offer for both the internal IT organization and the Self Service clients/ users it is a good practice to manage the expectations.

2. Is there an existing style guide, document or other resource which details and/or dictates the look & feel for your portal?

If you need to follow existing intranet or extranet guidelines, do the guidelines exist in a documented form? It is quite common that everybody believes it exists, but no recent, actual documentation is found. Does this make sense? If it is not there, do not bother making it. But be sure you get it early. If the look & feel of your portal is subject to subjective opinions on topics like fonts, logos, or colors it will delay your project. Especially if there is a veto possible for the whole portal based on these opinions.

Also make sure the documentation is complete, the portal can have styles that are not present in documents, i.e. highlighting of text and on click style of a button.

3. Can someone provide all logos and pictures you need in the right format?

Good quality pictures and icons of the products and services your department provides through the Self Service portal are important. Pictures should be consistent in quality, size and style in order to create a tasty and inviting catalog. The more products your portal offers, the more effort it takes to get the right pictures.

This may seem easy but if the catalog contains more than 100 items you will more than likely need the equivalent number of pictures. The internet is a great source for finding pictures but it may be rather time consuming and it may be difficult to find images of equal quality, size and similarity of the pictures and that will show in your portal.

4. If you are going to use a catalog like request system, do you know what the contents would be?

There is a difference between a portal that is operational from a technical perspective and one that is operational from a functional perspective. It becomes functional if it is filled with the right information. If the content of the catalog is determined by or has to be delivered by a source outside your project make sure it exists and is available. Preferably in a neutral format, for instance in MS Excel. That makes it easier to review the information in its own context rather than in the original environment.

Make sure the content is suitable for use in the Self Service portal and make sure that it remains possible to link the data with the backend/back office/supporting systems. Review this list and make sure the content is ready for your portal. This is something which actually often seems to continue after the go live of a portal. Of course things will change over time and so does a catalog, but getting it right at the beginning should be an objective.

5. Often catalogs like request systems require questionnaire type interaction, do you have the questions and answers available?

Are there already Service Desk scripts which can form the basis of these questionnaires? Do all requests have the same questions and answers? Is it possible that answer 'a' leads to question 'b', but that answer 'c' leads to question 'd'? If yes, start as early as possible documenting all this or reviewing it – if the documented Service Desk scripts are actually suitable for this type of interaction (someone reading a script may skip certain questions because they know that they can/should, an automated interrogation like a questionnaire will follow what you configure and that is a big difference)

6. A flow-type chart for e-mail triggers needs to be developed

Usually the transactions done in a Self Service portal are confirmed through an e-mail. The number of e-mails and the trigger on which they are sent can vary. E-mails confirming an order or asking for approval or confirming approval will inform the stakeholders about the status and reduce the need for monitoring the status. An overload of e-mail messages may result in ignoring them and adds to the risk of missing the urgent or important issues. It is imperative to create a flow-chart to describe these e-mail triggers.

This supports the design of the flow of e-mail messages and their content. A flow-chart describing the triggers (and exceptions) showing which e-mail is triggered at what event may proof to be very helpful. Also in this flow-chart make it very clear which e-mail is triggered by numbering or naming the mails for example with names like “MailToUser-Nr1” or “MailToIT-1”. The name is a hint of where it is going and makes re-using the same mail in the flow-chart possible, but also facilitates using distinct mails.

7. Develop a document containing the mails in the flow-chart

Create a word document or excel file which per e-mail referenced in the flow-chart describes:

1. Title
2. Subject – Line
3. Body of message
4. Is it plain-text or HTML
5. Logos used etc
6. Example result as the user gets it

All these e-mails you will need early since they may need to be checked by your marketing and/or communication department, especially when dealing with external customers. E-mails tend to take a long time and get a low priority in the project but they are really important actually and need to be there from the start of the first trials! Please do not create any of these e-mails in the system until it is agreed what it should be. If not, you will for sure keep on changing every time someone receives it. Take into consideration what will/should happen if a user replies to the mails they receive.

8. Who will be responsible for managing the content after (or even before) go live?

It is advisable to have this person in the project thus enabling a smooth transition after the project.

9. Go for less is the better approach

Instead of putting as much functionality as possible into the Self Service, think of what is actually used by the end user, and whenever possible merge the functions.

10. Will other existing ‘portals’ be merged into this project?

If this is the case, usually some budget will be available from other parts of the business, and even more important, an evaluation of the existing functionality should be done to see what can be removed and what must remain.

4. Other success factors

Good preparation and doing the right things only helps to make the execution easier. A lot more effort is necessary for a successful result and overall acceptance. The right preparations will make the execution easier, but do not guarantee good acceptance.

1. A waterfall project approach is good for the beginning of the project but should not be continued

Once the scope is defined and all preparations are done you should abandon a waterfall approach to the project. Once the realisation starts, it is important to have enough interaction with the user representatives. Creating the whole project result from the preparations you have done without interaction will lead to failure (which is likely to happen with waterfall).

Interact with users and project members by using firstly presentations. Deliver the results periodically on a test system and let stakeholders evaluate the portal. As a minimum consider a pilot. This way the project receives valuable feedback and increases the probability of success.

A lot of (valuable) input can still be provided in this phase. An agile development method like SCRUM or at least a good prioritisation is a helpful tool to handle this input. With the periodical deliveries you will not deliver all at once in the beginning, so start with the most important things to the business.

2. Be prepared to get input and allow budget for this, because it will come!!

Even if you have defined everything and everybody agrees on all items there still will be input if people start to see the results and start to use it for test purposes. Maybe the project members can envision everything based on the input, but users will for sure provide valuable input which you could not have thought of in the first place. Even if the project does not allow for modifying the agreed results, the level of acceptance will be much higher if things are documented and discussed and stored for a future phase II.

3. Be prepared for a phase II

It is impossible to predict what input your project will receive. Some issues may be impossible to implement in the current project and therefore have to be addressed in the future. The world changes while you are running this project and you have no control over that. Even a well prepared project may take easily two to three months from start to end. And let us not forget if you do this project well, people in your organisation will think of other things which may also be well suited for a place in the Self Service portal.

4. A Self Service portal should be self-explanatory, so will anybody actually read the manual?

Normal project practice is to document what is delivered. In case of a Self Service project it is not very likely your user will read a manual on how to use this portal. The portal should be self-explanatory and if it is not, the project is not completely successful. Use the time available for creating documentation for dotting the proverbial i's and crossing the t's (take the users` input on for example wording and positioning and make it better). If possible, make use of interaction designers from the start and not at the end.

5. Every Self Service project is unique?

Prepare yourself to learn from the past, but do not make the mistake to always replicate what was done in the past. Something being fit for purpose does not make it necessarily fit for use.

ABOUT THE AUTHOR

Titus Klijsen, Certified ITIL Service Manager since 1999, managing Professional Services for an IT Service Management software distributor and implementation vendor since mid '90's. Self Service project experience for over 10 years with different products, different customers, and different industries. Previous responsibilities include responsibility for the Service Desk of a Software Distributor.

Mexon Technology is a partner of Wendia, an internationally recognized provider of Service Management solutions for all types of industries and for every major market. With more than 20 years of experience, Wendia is offering a proven and certified solution to large-scale and medium-sized service and IT organizations in Europe and the North America.

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