



Self-Service Success

A Strategic Guide to Self-Service for the IT Help Desk

*Self-service support can be a make-or-break proposition. A self-service strategy that is properly **developed, tested, implemented, and managed** over time can add remarkable business value through saved costs and improved employee productivity. A failure in any one of these four steps can result in unemployment. This white paper provides a clear and comprehensive roadmap to ensure that your self-service initiative is successful:*

OVERVIEW

Self-service: It can't work, it won't work, and it will never work. Yet it works efficiently, consistently, everywhere, 24/7.

Think about it.

Every day you encounter a self-service outlet of some kind — the ATM, pay-at-the-pump, Amazon.com, eBay, self-service airline ticketing. Given the marvelous flexibility, availability, and ease of use of these vehicles, would you really want to go back to...

- Standing in line waiting for a teller to give you cash?
- Going to the bookstore to buy the latest best-seller?
- Get to the airport late, and then stand in line at the ticket counter?

Here's the conundrum: In spite of overwhelming empirical evidence that self-service is not only accepted but preferred by users, why is the notion rejected when applied to Corporate IT? Research and years of experience yield a simple answer — because most IT departments implement self-service in the wrong way, failing across a variety of critical areas: Debugging, cultural awareness, user training, communication, and management.

Remember the first time you were forced to use a self-service airline ticket kiosk? It was probably intimidating (especially in front of an impatient crowd), but airline personnel were standing by, waiting to help. They had learned from previous attempts that enforced self-service, without an initial awareness campaign and subsequent training was a failure in perception (by customers) and reality (by airlines). In continuous learning fashion, they positioned trained counter agents to teach customers how to best interact with the kiosk, thus taking the guesswork, time and frustration out of the experience.

By creating a single point of contact (SPC), coaching customers through the process and providing incentives, airlines changed perceptions and created genuine

enthusiasm and use of the service. The user experience was enhanced in ways that are most meaningful to travelers' — time and ease of use with no added cost. The airlines' secret was no secret at all; they created an awareness of, and need for, better and faster service with all the features and functionality of a counter agent, yet with none of the wait and all of the control over the experience.

Their learning's, good and bad, included:

Good

- Easy access to the self-service solution
- Convenient and available kiosks
- Trainers provided hands-on learning during the initial rollout
- Easy to get started – slide you credit card
- Automated and personalized processes
- Added additional features that added value to the single point of contact experience
- Familiar interface and easy navigation

Bad

- No business case made for the transition (effectively communicating the demand for, and benefits of, self-service in ways that meet customers needs, wants, and expectations)
- Poor-to-nonexistent customer training

Rules of the Road

Self-service is all about getting more done faster and feeling better about the experience. That is what is important to any consumer of any kind. The airline illustration is proof of concept — that self-service, properly debugged, preceded by an awareness campaign and supported by hands-on training and communication, can stimulate corporate employees to use self-service support rather than making the all-expensive phone call. Once they experience its benefits, self-service becomes a mindset and eventually baked into the cultural DNA.

Self-service success is not an oxymoron

Self-service success is more common than imagined, but far and away the exception rather than the rule in corporate America. The “**If we build it, they will come**” strategy is the typical reason behind most self-service implementation failures. Success is achieved only when you:

- Know what you are trying to achieve (vision)
- Develop a detailed, sequenced roadmap to bring the vision to life (objectives, strategy, implementation plan)
- Create the need for it (awareness campaign)
- Coach and support users through their learning curve (training)
- Manage it (continuous learning and improvement)
- Measure the before-and-after impact (the bottom line)

Self-service is not an end in and of itself

Everyone knows an IT person who fell in love with and then championed cool technology not because it was strategically and functionally better, but simply because it was cool. These are the tragically hip, not true business leaders. Self-service is not the be-all, end-all of IT initiatives. The results of any self-service implementation should show:

- Reduction in the total cost of support
- Optimized customer support experience
- Improved customer productivity — the biggest win of all

Self-service is not for everyone

Not all customers are created equal. Some will readily adopt self-service, while others will resist it with all their might. Not knowing your target audience is a failure point. Creating your self-service strategy with a realistic picture of who will use it, when, how, and for what purpose will help set realistic expectations with senior management.

Silence is golden

The most common and enduring mistake IT leaders make in launching self-service is trumpeting it as a miracle cure. Do not over-commit or over-sell self-service success. Instead, take the route pharmaceutical companies follow in developing and launching new drugs: Build, test, test again, test some more, conduct a stealth launch, then launch broadly with an educational campaign.

Self-service success comes from a **long-term, phased-approached** to generate an increase usage. Be focused, patient, persistent, communicative, and supportive in influencing in behavioral change.

Raving fans are your best friends

Frequent users are the most reliable measure of success. Focus on them, understanding what additional functionality, features and solutions you need to phase in over time to ensure sustainability and comeback usage.

These raving fans are your best allies and evangelists, exerting greater influence over outliers than anyone else. In them, outliers see peers who have not only adopted the new process, but have become more productive because of it. Use raving fans early and often.

Self-service success is unachievable without metrics

The service desk exists to increase the productivity of customers, including the IT operations staff. Self-service success metrics should measure both the operational and business metrics that speak more to quality, value, and cost than traditional service and support metrics.

Conventional, phone-based delivery metrics focused around operational efficiency (e.g., average talk time/work time, first-call resolution, abandons, average wait in queue) are inadequate for measuring self service success. Newer self-service metrics

must be more detailed in relating a 360° picture of providing the 24/7, end-to-end service management:

- How many problems, requests, and how-to training contacts are being handled?
- How many from each access channel (web, email, phone, walk-up, chat, etc.)?
- How many contacts have been deflected month over month through RCA and elimination? What are the cost savings/business impact (productivity) associated with these deflections?
- How much costs savings are realized and business value added by implementing self-service?
- How have customer satisfaction and productivity, IT business image, and perceived value of self-service increased?

Success is unachievable in a vacuum

A self-service implementation driven solely by an IT organization is doomed to fail. These nightmare testimonials say it all:

- *“They made me reduce my staff before they approved any investment in self-service solutions.”*
- *“During the implementation phase, there was a business downturn. I lost key designated resources to properly maintain, update, communicate, and enhance the self-service solution. Just like that, we were dead in the water.”*
- *“The self-service tool vendor improperly set management’s expectations around projected ROI based upon customer utilization. His subsequent recommendation for reduction in staff killed the project before ever started.”*
- *“Nobody told me that the toughest part of the project would be in changing people’s behavior. I had the technology, process and project planning down, but I missed the change management, training and marketing campaign by a mile!”*
- *“We have a ‘pick up the phone and call’ culture.”*
- *“Our customers are too busy to use self-service.”*
- *“Our Service Desk is best in class — they answer the phone in less than 15 seconds and resolve the problem on first contact around 75% of the time. Our customers have no incentive to use self-service.”*
- *“Our self-service website is TOO busy and the solutions are too buried for anyone to find and use them easily and consistently.”*
- *“Our self-service website was designed and developed by Application Developers, who don’t know much about customer preferences regarding self-service design and navigation.”*
- *“We have no way of measuring who uses it, what they use it for, and if they successfully found what they were looking for.”*
- *“Self-service... Yeah – we tried it once.”*

TOP 10 PRIORITIES

One person's failure is another's learning. Those who have been down the self-service road provide us a clear set of priorities in order to avoid their mistakes:

1. Work first, last, and always to change customers' beliefs and behaviors around self-service.
2. Justify investment in a prototype and conduct multiple pilots to identify the correct value drivers, debug, and finalize requirements.
3. Minimize risk and the downside — don't set the bar or expectations too high.
4. Avoid a full shotgun rollout with a loud marketing launch. Start small, be stealthy, and prove/measure it first. Silence is golden.
5. Timing is everything. Link strategy and goals to current corporate initiatives, especially cost-cutting ones.
6. Design for simplicity — customers like directness and lots of white space (think Google).
7. Track and measure every self-service interaction.
8. During initial rollout, follow up via telephone survey with every self-service customer.
9. Distinguish and apply the correct metrics — change team and individual performance goals to reflect the new mix of self-service and traditional phone metrics. Beware of the contradiction between self-service success and individual success, as well as taking credit for self-service resolutions, call avoidance, and any targeted problem elimination.
10. Take the time needed to accurately and intimately identify your target audience and the problem types and categories to be self-served.

INCH BY INCH, STEP BY STEP:

BUILDING A SOLUTION WITH CEMENT, NOT QUICKSAND

It is never easy to wake up one morning and decide to implement a self-service solution. The complexity, demands, and mile-a-minute business changes already make the life of an IT leader stressful and taxed. It's likely that over the past few years, you have consolidated help desks into a single-point-of-contact service desk; continued to handle the entire customer base's problems, requests, and training needs; and begun to support an ever-growing portfolio of Business Critical applications.

The challenge is clear: Continue to increase contact volume and problem complexity — which results in increasing demand against “stay-the-course” service desk staffing levels, — or develop and implement a self-service strategy to manage demand, deflecting non-value-add requests, issues, and training to self-service while freeing up the phone queue to respond to and resolve issues of greater urgency and impact.

If you choose the self-service option, how do you build your solution with cement rather than quicksand? Inch by inch, step by step...

1. - Build a business case

The business case process, the single most compelling influence on senior management, ensures that your plan is thoroughly researched, and the business need and value of your investment is well justified. The process forces you to ask the right questions:

- How will customers benefit from this?
- How will this enable them to work more efficiently and effectively?
- How will self-service benefit the business in the short term and long term?
- What are the value drivers that make up the cost/benefit analysis and financial metrics?

The business case is the means by which you can obtain buy-in, funding, and resources for the first phase of the self-service initiative. In this phase you define business value and the requirements necessary to deliver it; identify an approach that will balance investment with return and begin the process of creating a clear vision and strategy for success.

2. - Create a vision and strategy

There are many compelling reasons why successful companies create a vision and strategy for initiatives such as self-service, but one rises above all — if you don't define what success looks like, how will you get there, and how will you recognize it?

Envision the end-result first. What does it look like? Does it have both functional and emotional appeal? Is it clear and compelling? Does it define the service desk's value-added business impact?

An aligned strategy, comprised of business goals, success metrics and performance incentives, brings the vision to life. The strategy fleshes out and strengthens your pitch, gathering support and momentum for your plan. Ensure that your pitch passes the senior executive sniff test — brief, direct, and articulates the three most persuasive reasons why self-service is a business imperative. Ask yourself the right questions to build your strategy:

- Does your self-service strategy clearly articulate which activities, roles, and responsibilities are necessary to achieve success?
- Does it set proper expectations in the short- and long-term regarding requirements (resources, processes, tools, training, etc.)?
- How will you change behavior? How do you get people to visit, use it, and come back time and again?
- What will be the measure of success?

Remember, in the world of business, your vision and strategy remain the undisputed anchor point for any necessary change or action. Don't make it good, make it great. It will guide you through all phases of your self-service initiative.

3. - Create a change management plan

The change management plan provides the necessary framework and sequence for identified tasks and communications to occur. Your plan should include operational and business metrics, training (customers and service desk professionals alike), and your marketing communications strategy. It should also include activities such as ongoing maintenance, support, and knowledge management.

Above all, do not try to change everything at once. If you have the luxury of time, buy it! Set the right pace to introduce this cultural change. Remember — the best way to make change happen is to lead change. (See **Appendix A. John P. Kotter's 8-Step Program for Winning at Change.**)

Your change management plan should:

- Recognize where you are.
- Prepare for fear of, and resistance to, change.
- Anticipate criticism and appropriate responses.
- Drive change down to the grass-roots level.
- Get to the heart of the resistance.
- Recognize that you cannot please everyone.
- Celebrate measured success.

4.- Engage your customers

The best way to increase your success rate in the short-term of the rollout of self-service is to involve your customers in the functionality requirements and design stages. Bringing them into the process creates a sense of ownership — now they have skin in the game and become your best partners and advocates. Engage them in all phases.

5. - Walk the walk, talk the talk

Business leaders must become influencers, demonstrating the benefits of self-service by consistently and publicly role-modeling the right behaviors. Leaders need to show people how to leverage self-service to get what they need and better contribute to the organization's bottom-line: "Let me show you how I use self-service to get my job done better and faster."

6. - Communicate creatively, consistently, constantly

Identify the key messages you want stakeholders to communicate. (See **Appendix B. Sample Marketing Communication Plan to Drive Change**). These core messages should be delivered from and to all levels of the organization. The messages should:

- Address the reasons for change
- Describe how the change will positively impact their day-to-day productivity
- Guide them in using the self-service solution
- Direct them to training and support resources
- Champion the front line
- Address barriers, objections, and outliers
- Create a two-way communication channel
- Capture customer feedback

Remember — you can never over communicate around an initiative that involves driving cultural change. Leverage all existing communication channels, be creative in developing new vehicles and ways to deliver them, be consistent in your messaging, and never stop communicating.

However, under no circumstance should you over-promise or over-commit.

7. - Create a training plan

Make training the lynchpin of your plan. Remember the airline example? They failed at first because they ignored customer training.

Allocate the proper resources and budget necessary for training. Get traction by identifying training needs, targets, and opportunities. First train leaders, influencers, customer advocates, front-line professionals, and the local experts. Create a train-the-trainer approach to cascade training to everyone in the company. During rollout, make sure to use customer feedback and self-service tracking logs to continually improve training and communications.

8. - Identify performance metrics

If you are changing the rules of the game for the players, make sure you change the metrics by which their performance is measured. It's common sense and good business practice to align job descriptions, key performance indicators, and incentives of service desk professionals who must sell the self-service solution to customers. Recognition is the best enabler and motivator! Use incentives, contests, rewards, and celebrations for customers who regularly use the self-service solution, and for team members who drive acceptance of self-service. Make your recognition plan flexible — both methodical and opportunistic in the way you celebrate customer and team-member wins. Create performance metrics and embed them in your training and communication plans.

SOLUTION PHASES

Phase I: Planning and Design

Phase II: Implementation, Communication and Rollout

Phase III: Maintenance, Measurement, and Support

Phase I: Planning and Design

First impressions are everything when it comes to self-service. Employ these practical recommendations (some of which have already been described) to ensure customers will react favorably to the solution and use it.

- **Evaluate current problem demand**

- Apply Root Cause Analysis (RCA) techniques to accurately identify problem types and categories best suited to be resolved by self-service.

- **Translate problem information**
 - Quickly convert it to customer-friendly knowledge.
 - Make the process easily repeatable.
 - Ensure access to knowledge is simple, fast, and targeted to match the right problem with the right solution every time.
- **Collaborate with customers during the design phase**
 - Hold focus groups with them and create customer advocacy teams to spread the word.
- **Select a self-service technology process that supports your vision and strategy**
 - Must be easy for your customers to use and easy for you to maintain.
 - It should be intuitive and intelligently designed.
 - Deliver comeback value by continuously updating content, features, and functionality.
- **Identify all of your constituencies — Different strokes for different folks**
 - Young employees
 - New employees
 - Early adopters
 - Part-time/seasonal workers
 - High-turnover positions
 - Positions that normally go untrained
 - Administrative positions
 - Partners
 - Vendors
- **Target the right problem-type grouping**
 - Rollout of new applications, functionality, services, technologies, products, programs, etc.
 - Legacy applications or applications or to be retired.
 - Business Cycle applications (used periodically like expense reporting, budgeting, planning, special programs, etc.).
 - Frequently Asked Questions (FAQ).
 - On-boarding and supporting new employees.
 - Installations, Moves, Adds and Changes (IMACs).
- **Build in feature/functionality they will use and value**
 - Identity Management/Password Management.
 - Compliance processes requiring 100% tracking (e.g., Sarbanes-Oxley, HIPPA, etc.).
 - ALL Service Requests/Requests for Change.

- Submitting, status checking and searching known errors and workarounds in your Incident/Problem Management systems (when normal business operations (productivity) are NOT impacted).
- Simple, canned, proven resolutions.
- Scripting solutions that, when downloaded by the customer, are applied quickly and seamlessly to resolve the problem.

Phase II: Implementation, Communication and Rollout

Your proactive, visible leadership is the key to Phase II success. Get out of your office and lead by example. Be visible, supportive, and enthusiastic with your team and your customers. Monitor usage and results hourly. Frequently mystery-shop the self-service solution yourself during rollout. Record all successes, failures and corrective actions taken during this stage.

As in the planning and design phase, continue to survey early adopters to understand their self-service experiences and collect data around the details of their issues and resolutions. How can we improve it? Would you recommend the self-service solution to a colleague? Would you provide a testimonial?

- **Remember the 3X rule: It takes at least three impressions (verbal, written, and/or tactile exposures) to remember a message**
 - Just as you tire of your messaging, people are starting to hear and remember it.
 - DON'T change your messaging. If you do, people will either get confused or think you are not serious.
- **Enlist the help of others to get the message out**
 - Create customer advocates — Raving fans.
 - Encourage senior management to walk the walk and talk the talk.
 - Develop peer management “pitchmen.”
- **Ask yourself: If I were a customer – would I use it on a regular basis?**
 - Use it yourself and regularly mystery shop.
- **Is self-service so easy, so simple, and so intuitive that even a senior executive could use it?**
 - Can an executive use it to get their problem solved, request fulfilled, or question answered?
 - Facilitate a discussion with senior leaders on needs and expectations.
 - Anticipate their future needs and always stay one step ahead of them.
 - Automate as much as possible. Use data field triggers to continually advance them through to the solution's end.
 - Personalize as much information as possible.
 - Eliminate as much data entry and keystrokes as possible.
 - Communicate with leadership before, during, and after... electronically, of course!

- **Be patient**

- Do not try to do too much, or do everything at once.
- Attack the low-hanging fruit first.
- Continually learn from your mistakes.
- Do not make too many changes at once. Otherwise you'll frustrate end users and greatly reduce customer satisfaction.
- Manage everyone's expectations, including your own. Anticipating immediate results will create disappointment and the perception of failure.
- Give customers enough time to get used to the new way of working.

Phase III: Maintenance, Measurement, and Support

Implementing a self-service application takes a great deal of effort. Once a system goes live, IT professionals often feel that most of the work is behind them. Enhancements, fixes, and updates are made to the self-service solution, but rarely do project leaders go back to the customer to address additional needs and requirements.

- **Maintenance and tracking**

- Continue to drive senior management support and engagement in the self-service initiative.
- Conduct regular follow-up training to ensure everyone knows all of the functionality available to them and how to use it successfully.
- Continuously incorporate additional functionality and features.
- Integrate your self-service solution with your ticketing system by aligning problem categorization and access methods.
- Track and measure customer self-service usage. Know who they are.
- Also know which customers don't use self-service, and why. Understand their objections and find ways to address their concerns.
- Consistently communicate wins, especially those related problem types, number of contacts deflected through the self-service solution, increased productivity, and business value added.

- **Measurement**

At the end of the day – what is the measurable impact of self-service? What will you measure and report on?

- Establish multiple success criteria with a Balanced Project Scorecard (BPS), with measurements that:
 - Are critical in demonstrating success and establishing credibility
 - Assist in quickly identifying and closing gaps.
 - Are valuable input into the investment decision making process.
 - Illuminate successes, opportunities, surprises, causes, gaps, etc.
 - Demonstrate business benefits delivered.
- Business benefits may include, but are not limited to:
 - Self-service utilization
 - Successful resolutions

- Customer satisfaction
- Repeat customers
- Call category deflections
- Total cost of support savings (See **Appendix B. Tracking and Reducing Cost Per Resolution.**)
- Service desk resources freed to concentrate on mission-critical business services.
- Productivity improvements
- Bottom-line benefits
- Measure and graph baseline, actual, and target over given time periods.
 - Present data graphically, numerically, or in table format to best highlight successes, opportunities, surprises, causes, and solutions.

• **Support**

- The Service Desk must OWN accountability for the self-service solution and focus on usage, customer satisfaction, content refresh, training, communication, and the processes that link Tier-0 support to Tier-1 support when escalation is required.
- Regularly review the contact logs (tickets) for both Tier-0 and Tier-1 to determine problem types and categories that are better resolved at Tier-0 rather than Tier-1.
 - If the functionality and proof of successful resolution of those problem types are evident, you must address WHY customers continue to rely on phone support.
- Regularly review Service Desk metrics for both the individual and the team to ensure that the current self-service strategy is not creating undesirable behavior based on the current self-service focus.
 - Make sure all Service Desk metrics are properly aligned with the self-service goals and objectives.
- Increase customer usage by:
 - Selling the customer on self-service, especially when they are calling about problems/requests that have self-service solutions.
 - Taking every opportunity to demonstrate the easy, simple, fast, and personalized nature of the self-service solution.
 - Identifying and correcting issues that prevents or deflects users from utilizing self-service.
 - Pinpointing additional functionality and features that can direct more problem types and categories to self-service.
- Make sure self-service support is simple, fast, easy, and intuitive:
 - Service desk phone numbers, email address and web-chat session should all be strategically located.
 - Give the customer the option to escalate and route the ticket to the Service Desk with details of what they have done to date for immediate follow-up.
 - Create a self-service dashboard that gives you real-time statistics

SUMMARY AND CONCLUSION

Evidence abounds outside the workplace that self-service not only works, but quickly becomes the preferred method for customers to handle their own transactions. Consider the prevalence and cultural acceptance of such self-service outlets such as ATMs, online shopping (Amazon.com, eBay, etc.), airline self-service ticketing, and pay-at-the-pump.

While self-service is a choice for customers, it is not optional for IT organizations. In the face of increasing support demand against reduced resources, IT leaders can and should develop and maintain a self-service solution that meets the needs of its customers and the business. However, the devil is in the details, and more organizations have failed in their attempts to institutionalize self-service because of poor planning, management, and communications. Their failures, though, are instructive, because understanding their mistakes illuminate the pitfalls to avoid and critical success factors that must be in place.

Pitfalls include:

- Over-promising levels of service and benefits
- Failing to understand the target audience, their needs and expectations, and design a solution tailored to their world
- Neglecting to incorporate customers in all phases of design, development, testing, and rollout
- Failing to manage change against legacy thinking and behavior
- Lack of role modeling by leadership

Success factors include:

- Know what you are trying to achieve (vision)
- Develop a detailed, sequenced roadmap to bring the vision to life (objectives, strategy, implementation plan)
- Build a business case to gain support and resources (sponsorship, authority, and checkbook needed)
- Create the need for it (awareness campaign)
- Coach and support users through their learning curve (training)
- Manage it (continuous learning and improvement)
- Measure the before-and-after impact (the bottom line)

Above all, the greatest challenge for IT leaders is understanding and strategically managing the cultural change driven by a self-service solution.

What makes self-service appealing? Fast and easy access to a single point of contact, attractive design and intuitive navigation, personalized processes, hands-on training during rollout, and continuously added content, functionality and features.

What are the barriers to self-service? Legacy thinking, no incentive to change, lack of leaders role modeling self-service behaviors and mentoring others, and poor use of customer advocates.

The key to success lies in building and living the business case. Knowing and proving the constraints and costs of service delivery by phone versus self-service support is the most effective way to justify, develop, manage, and improve self-service support.

There are three phases to creating a self-service solution:

1. Planning and Design
2. Implementation Communication, and Rollout
3. Maintenance, Measurement, and Support

In the planning phase, it is crucial to:

- Build a compelling business case
- Articulate your vision (emotional) and strategy (functional)
- Establish your rules of the road and key priorities
- Incorporate customers and turn them into raving fans
- Identify your audiences and design a tailored solution
- Create a training plan
- Identify performance metrics

As support leaders, we must be proactive in our thinking and actions, providing our customers self-service solutions that are easy to access and use; offer them satisfactory answers and solutions; and deliver a consistent, positive, successful experience.

The value proposition for the organization is simple: Reduced costs by deflecting non-critical-path issues away from phone support and to self-service. Expensive labor involved in providing non-value-add support to phone-generated contacts is a waste of a company's resources and money. Providing support via the phone is a one-to-one relationship — labor is committed to that one issue, question, problem, or customer for that period. Self-service support creates a many-to-one relationship, with extraordinary functionality, knowledge, and information accessible 24/7 by anyone and everyone. Moreover, a return on each self-service asset is generated every time a customer successfully accesses it and gets what they came for (resolution, answers, forms, etc.).

Throughout the three solution phases, focus on identifying problem types and categories, and quickly converting them to posted knowledge and resolutions on the self-service solution. Keeping track of progress is critical to your success. Developing baseline metrics to accurately gauge performance improvement throughout all phases of the self-service project should be reported using the Balanced Project Scorecard tool.

Given the realities of the current and near-future regarding the ever increasing demand for services, the intensified complexities of support, and the pressure to

increase services while maintaining headcount, IT leaders must find innovative ways to deliver on service level commitments. This is reality; this is a business imperative.

A practical self-service solution is the way to go — slowly, carefully building traction, credibility, support, and utilization by providing the self-service solution that your customers asked for and are now willing to use because you thoughtfully designed and implemented it and now maintain it to work... all the time. The time is now.

ABOUT MCGARAHAN & ASSOCIATES



Peter J. McGarahan is the founder and president of McGarahan & Associates. Pete is also the acting Chairman of the IT Infrastructure Management Association, a sister organization to HDI. Pete's value to the service and support industry and business is his thought leadership. As a practitioner, product manager and support industry analyst and expert, he has influenced the maturity of the service and support industry.

His passions for customer service led the Taco Bell support organization to achieve the **Help Desk Institute Team Excellence Award**. IT Support News also named him one of the **"Top 25 Professionals in the Service and Support Industry"** in 1999. Support professionals voted McGarahan **"The Legend of the Year"** in 2002 and again in 2004 at the Help Desk Professionals conference for his endless energy, mentoring and coaching and his valuable contribution to the support industry and community.



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APPENDIX A.**JOHN P. KOTTER'S 8-STEP PROGRAM FOR WINNING AT CHANGE**

1. **Instill a sense of urgency.** Confront reality, and identify existing or potential crises/opportunities.
2. **Pick a good team.** Assemble a strong, guiding coalition with enough power (authority and checkbook) to lead the change effort. And make them work as a team, not as a committee!
3. **Create a vision and supporting strategies.** We need a clear sense of purpose and direction. In less successful situations you generally find plans and budgets, but no vision and strategy; or the strategies are so superficial that they have no credibility.
4. **Communicate.** As many people as possible need to hear the mandate for change loud and clear, with messages sent out consistently and often. Forget the boring memos that nobody reads! Try using videos, speeches, kick-off meetings, workshops in small units, etc. Also important is the teaching of new behaviors by the example of the guiding coalition
5. **Remove obstacles.** Get rid of anything blocking change, like bosses stuck in the old ways or lack of information systems. Encourage risk-taking and non-traditional ideas, activities, and actions. Empowerment is moving obstacles out of peoples' way so they can make something happen, once they have the vision clear in their heads.
6. **Change fast.** Little quick wins are essential for creating momentum and providing sufficient credibility to pat the hard-working people on the back and to diffuse the cynics. Remember to recognize and reward employees involved in the improvements.
7. **Keep on changing.** After change organizations get rolling and have some wins, they don't stop there. They go back and make wave after wave of other actions necessary for long-term, significant change. Successful change leaders don't drop the sense of urgency. On top of that, they are very systematic about figuring out all of the pieces they need to have in place before they declare victory.
8. **Make change stick.** The last big step is nailing big change to the floor and making sure it sticks. And the way things stick is through culture. If you can create a totally new culture around some new way of managing, it will stay. It won't live on if it is dependent on one boss or a couple of enthusiastic people who will eventually move on.

**APPENDIX B.
SAMPLE MARKETING COMMUNICATION PLAN TO DRIVE CHANGE**

Identifying expensive, desktop-related problems are typically Tier-2 activities, which include an onsite customer visit and resolving them with the help of Remote Control, Knowledge Bases, Training, and Documentation.

Stakeholders	What	How	Why	When
Senior Management	<ul style="list-style-type: none"> • Progress/Results • High-level Summary • Business impact/alignment • SLAs & cost-effective delivery • Customer sat/experience 	<ul style="list-style-type: none"> • Face-to-face • Informal presentation • Elevator speech 	<ul style="list-style-type: none"> • Improve image and credibility • Show value and alignment • Prove cost-effective deliver of best practices 	Quarterly
Peer Management	<ul style="list-style-type: none"> • Progress/Results • Trending • Call/Problem escalation • Root Cause Analysis 	<ul style="list-style-type: none"> • Face-to-face • Meetings • Formal presentation • Email 	<ul style="list-style-type: none"> • Improve image and credibility • Show value and alignment • Partner to provide seamless, end-to-end service management 	Monthly
Leadership Team	<ul style="list-style-type: none"> • Progress/Results • Customer sat/experience • Performance metrics • Training/Development progress • Shared Resources 	<ul style="list-style-type: none"> • Face-to-face • Meetings • Formal presentation • Email 	<ul style="list-style-type: none"> • Grow Leaders • Build teamwork and trust • Reinforce goals and objectives 	Weekly
Professionals	<ul style="list-style-type: none"> • Progress/Results • Performance metrics • Business impact/alignment • SLAs adherence 	<ul style="list-style-type: none"> • One-on-one meetings • Team meetings • Formal presentation • Email 	<ul style="list-style-type: none"> • Show leadership commitment and follow-through on commitment • Increase trust and credibility in Leadership • Increase morale, retention, image, productivity and pride through training and 	Weekly
End-User/Customers	<ul style="list-style-type: none"> • Progress/Results • Customer sat/experience • SLA adherence • Adding value 	<ul style="list-style-type: none"> • Departmental meetings • Training • Email • Marketing collateral • Town hall meetings 	<ul style="list-style-type: none"> • Improve customer experience • Show value-add and alignment • Improve SLA adherence/performance metrics 	Quarterly

**APPENDIX 3.
TRACKING AND REDUCING COST PER RESOLUTION**

As problems escalate from Tier-1 to Tier-2 and Tier-3, the cost to resolve them increases about 75% from one tier to the next. The goal, then, is to reduce Tier-2 issues to Tier-1 to Tier-0 to elimination altogether. The benefit of developing and implementing a right-to-left support strategy is the way in which call types and categories can be identified and directed to the appropriate tier, and cost savings/benefits derived from it

Targeting and shifting more problems for resolution at the lowest levels (Tiers-1 and -0), is imperative to manage demand and resources across the most vital dimensions: Business impact, situational urgency, issue complexity, first contact resolution, mean time to resolve, total cost of support, customer satisfaction, and continual learning.

IT service and support organizations must regularly practice Root Cause Analysis (RCA) to identify recurring problems (hardware, software, business applications, connectivity, email, internet or printing) and work to eliminate or deflect them to the self-service solution. A large number of everyday problems, requests, and questions are naturally driven to the Tier-0, self-service solution (For example, identity/password management, request management, opening and status of tickets, and searching the knowledge base repository). Identifying where problems are resolved in the service and support model, then creating an action plan to shift them to self-service — where the cost of resolution is dramatically lower — is the value proposition to create organizational support.

