



Why Wouldn't You?

Make Knowledge Management / Self-service Critical To Your Success.

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It doesn't have to be hard

The question is simple; why aren't more organizations using self-service successfully? In researching the answers to this seemingly simple question, I was brought into engaging conversations, traditional rhetoric, innovative thinking, encouraging leadership as well as the SOSAD (same old song and dance). I want to thank the people I spoke with who reap the daily benefits of self-service success, the ones that continue to struggle with dimmed hopes of success and the non-believers that doubt it could ever be successful at their organization. The main differences between the self-service successful was that they had a strategic purpose, a passionate commitment and established the right partnerships with the sponsors, customers, staff and vendor! I have been in the industry for over 20 plus years and it is refreshing to see and hear people excited about self-service in a very practical and rational way. This grounded optimism is in confidently knowing the potential opportunities by strategically linking the self-service initiative to an organization goal or objective. By setting expectations and clarifying the business benefits, the self-service leader embarks on a continuous journey of selling the value of people helping themselves, 24x7, to achieve lower operating costs and a better customer experience. As one interviewee stated, "I approached, sold and marketed the self-service solution like my career depended upon it!" It's not easy, but it doesn't have to be hard either.



"Does anyone know?"

"Does anyone know" is the rally cry of the uniformed. Why has it been so difficult to implement and maintain a central repository of knowledge that is easily self serviceable to people who need answers now? You know what type of questions they ask repeatedly. You know what problems continue to impact their productivity. You know what systems and services they use and what standard requests (forms) they make in a regular basis. You know what incidents we escalate to Level-2 teams because we do not have the resolution documented and easily accessible. So what's the problem? Why is being successful at Knowledge Management

and Self-service so hard? It could be that we are not identifying the RIGHT targets to measure our success against. To identify real target areas, we need analyze our data through reports, look at the trends for several different incident types and try to identify the point where the business may be impacted. Some targeted areas of opportunities as detailed in the ITIL processes for Incident and Problem management as utilized by the Service Desk to the benefit of all involves:

1. Reducing the volume of incidents escalated to Level-2 and Level-3 support groups. Incidents with workarounds should never be escalated to a tiered support group. This increases first contact resolution while minimizing handle time and enables level-2 support resources to focus on higher priority items and infrastructure and application projects.
2. Monitoring the escalated incidents with no workaround. Analyze the high priority incidents, the most frequently escalated and the longest Mean Time to Resolve (MTTR) as areas of opportunity for creating and publishing workarounds/solutions accessible through the Self-service portal or Incident management tool.
3. Through problem management, justifying the investment in a permanent solution by determining workarounds that are most utilized and which incidents are causing serious business impact and dissatisfaction with the services provided by the Service Desk and IT.
4. Focusing on accurate and complete incident record logging for to more easily identify opportunities to author and publish solutions to Frequently Asked Questions and "How To" training questions.

At what cost?

The transformation of how a business interacts with its customers is in the process of changing forever. The promise has been made before, but only now are businesses truly establishing an electronic presence for all customers to engage anytime, anywhere. Seriously, can we continue to improve the quality and experience of delivering phone support? At what real or opportunity cost to the business? Customers will always have problems, questions and requests. We also need to be mindful of the value and experience we are creating by providing our customers with direct access to the solutions, answers and products and services versus establishing a single barrier only accessible by phone and dependant on the resources and scheduling sparingly allocated to it.

Envision the end result of a success self-service and knowledge management program as if an executive stopped you in the hall and said, "Pete, how's that Self-service solution going?" I would say, "It's better than expected sir! Our user community now has the information and functionality they need literally at their fingertips. They have remarked that it is more than just a repository of solutions, it is a learning tool! It saves us time and effort which we have redirected to other higher value services and it gives our customers the

correct, precise answers to their problems on their first try with a more consistent, easier and pleasant customer experience.” If you could, why wouldn't you?

If you could, would you?

For a long time, I have debated the question, “if I knew the solutions contained in my Self-service portal were used successfully by 25% of my user community and I consistently high on my customer satisfaction rating, why wouldn't I stop taking calls for that subject matter and redirect them to the web for self-service success. Think about it.

I was attending a knowledge management session at industry conference recently when I asked the presenter who was getting 30% adoption, 90% success rate and a high customer rating when they planned to make the automated Password Reset tool the ONLY option for resetting passwords. She said that they were giving it some thought, but were hesitant to make it mandatory. A young lady in the audience said, “You probably don't want to force your customers to ONLY use self-service rather than calling, it might impact customer satisfaction. I thought about it for awhile and said, “You know, I think I would take the hit on customer satisfaction, knowing confidently that my self service solution worked consistently for a statistically valid sample of my user community.” She looked aghast! I further stated, that if I was basing my value on a Customer Satisfaction Index (CSI) based on resetting passwords, then I should think differently about what services I could offer that would be of higher value to the organization.



Think Differently

At what proven point, should calling the Service Desk for requests, password resets, status calls and simple “how to” just in time training no longer be an option? Who will make the tough call? What service leader will defend the position that the self-service portal offers a more reliable, consistent, successful customer experience – and at a lower cost! Think differently about your current service and support situation.

1. Are you doing all the right things according to industry best practices and ITIL processes?
2. Are you satisfied with your current level of respect, resources, funding, tools and scope of services?
3. If you had a successful self-service solution, would you require your user community to always check the self-service repository for their answer before calling the service desk?
4. Would you make the phone queue only available to critical business impact incidents with a high level of urgency?

You know you could do more for the organization, if you only had the right opportunity! Look no further - the right opportunity is right before your eyes! You will not only solve some very real pain points but you increase first contact resolution, increase solution accuracy and consistency while reducing training time and learning curve for new service desk professionals as well as new employees. It is time to give the customers what they want, create some very real business benefits and deliver a return on the investment. The time is now! Seize the opportunity and reap the rewards for creating a long-lasting solution, based on organizational knowledge, shared and utilized by employees for years to come.

ABOUT MCGARAHAN & ASSOCIATES



Peter J. McGarahan is the founder and president of McGarahan & Associates. Pete recently served as the Chairman of the IT Infrastructure Management Association, a sister organization to HDI. Pete offers 25 years of IT and Business experience helping IT organizations optimize their service delivery model to support business objectives. His 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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