Virtual Agent on the HI Service Portal

The challenges and benefits realized at ServiceNow
Conducting business in the self-service era

User expectations have changed. It’s no longer enough to fill your office with support agents ready to answer the phone and reply to emails. Today, most users prefer to resolve issues on their own because it’s faster and easier. Conversational chatbots such as the ServiceNow Virtual Agent empower businesses to meet these changing expectations by providing consistent, scalable, and always-on self-service interactions.

The HI Service Portal is ServiceNow’s single location for customers to manage instances, find answers, and request help. It often serves as a pilot customer for new ServiceNow products or features, including Virtual Agent. The HI team focuses on showcasing and demonstrating these new solutions in practical ways from the perspective of fullfillers (the internal team) and requesters (ServiceNow customers).

HI became an early business partner for Virtual Agent by demonstrating the end-to-end deployment process and shaping a repeatable methodology that ServiceNow customers can use to ensure a successful implementation.
The challenges facing HI

The HI team approached their Virtual Agent implementation by focusing on two key challenges:

An increasing volume of support requests
The number of requests HI receives on a daily basis has been steadily increasing over time, and this increase creates a scaling problem with a snowball effect. Simply put, the number of human agents must grow to match the volume of incoming requests to maintain response times and customer satisfaction levels. And there are significant costs involved in scaling the workforce because each additional agent requires investments in additional equipment, office space, and training.

Providing around-the-clock support
The support teams at HI are spread across the globe to provide 24/7 support for P1 and P2-level incidents, but P3 and P4 incidents are typically handled during business hours. This means that customers who need help with standard, routine requests, including password resets, status checks, or profile changes, may need to wait until the next business day to receive assistance. These timelines are acceptable for low-priority requests, but HI wanted to provide an even better experience for users.
There were two primary reasons the HI team felt Virtual Agent was the best solution to help with these challenges. Virtual Agent could free service desk resources to focus on higher-value work by automating the most common, simple requests. And the overall customer experience would improve by offering on-demand answers and access to information through Virtual Agent.

HI followed a four-phase approach—prepare, design, build, and launch—and went live with their Virtual Agent implementation after just 4 months of working with pre-release code. The design process with stakeholders identified and then selected 10 conversation topics for the initial rollout, including these six common requests:

- **Check Status**: Retrieve and show details from recent incidents or requested items with the ability to add new comments to each.
- **Update Profile**: Add, edit, or remove contact information for the user’s HI account.
- **Remove Demo Data**: Step the user through the process of removing demo data on a non-production instance.
- **Update Notification Preferences**: Allow the user to view and adjust the types of notifications received from HI.
- **Reset Password**: Provide the user with a link to pre-existing documentation detailing the password reset process.
- **Search Knowledge Base**: Allow the user to search KB articles for specified terms.

A high number of use cases were identified through interviews, but the HI team brought their Virtual Agent to the service portal quickly by focusing on just a subset of the topics for the initial launch. Many of the remaining use cases have already been incorporated into the deployment as HI continues to iterate and add more functionality to their Virtual Agent.
Lessons learned

The initial deployment of Virtual Agent for HI helped create the following practical guidelines that customers can now follow to improve their own implementation:

1. **Use feedback loops and iterate**
   Providing an easy way for users to share feedback about their experience was absolutely critical to ensuring a successful implementation. HI was able to fine-tune each conversation by collecting feedback provided by employees and customers through early demonstrations and testing phases. Actively soliciting this feedback allowed HI to create a better experience by identifying and resolving potential issues before topics were launched to a wider audience.

2. **Focus on simplicity and empathy**
   The HI team recognized that users were coming to Virtual Agent to get help with a problem, so it was important to design the conversations in ways that simplified the support experience. Virtual Agent’s personality needed to be empathetic towards the user’s issues, and the tone of voice had to be consistent across all topics. Creating user journey maps and visualizing the conversation flows in advance of the deployment also helped ensure users had simple, enjoyable experiences.

3. **Use out-of-the-box topics as a starting point**
   Virtual Agent ships with pre-built topics for some of the most common IT, customer service, and HR service delivery conversations, but every organization is unique and may require its own customizations. The HI team was able to save a significant amount of time by leveraging the out-of-the-box content as a reference and starting point for the team’s needs.

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Out-of-the-box topics are a great starting point, but you will need to spend time understanding your specific flows. The built-in topics will help kickstart your thinking.

— Reid McMenamy
Senior Manager, Support Process
Savings and benefits

Customers immediately found Virtual Agent to be easily accessible and intuitive to use, which resulted in three key benefits to HI:

**Improved service quality and response times**
Customers can initiate conversations on a 24/7 basis with Virtual Agent and receive instantaneous responses instead of waiting until the next business day for information.

**Reduced agent workload**
Support agents can focus more of their time on high-priority and complex requests now that many of the common, routine issues are handled in a self-service manner through Virtual Agent.

**Improved business efficiency and customer satisfaction**
The combination of these benefits allows HI to provide consistent and reliable information at any time. A context-driven chatbot such as Virtual Agent drives productivity and cost effectiveness while maintaining high levels of customer satisfaction at scale.

“Virtual Agent go-live is just the beginning. We plan to continue making improvements to topics based on user feedback and issues reported. And as the solution continues to evolve, Virtual Agent chat will be a key part of guiding users through step-by-step work tasks.”

— Brooke Hendricks
Global Product Owner
Virtual Agent on the HI Service Portal

The challenges and benefits realized at ServiceNow

About ServiceNow
ServiceNow was started in 2004 with the belief that getting simple stuff done at work can be easy, and getting complex multi-step tasks completed can be painless. From the beginning, ServiceNow envisioned a world where anyone could create powerful workflows to get enterprise work done. Today, ServiceNow is the cloud-based platform that simplifies the way we work. ServiceNow software automates, predicts, digitizes, and optimizes business processes and tasks, across IT, customer service, security, human resources, and more, to create a better experience for your employees and customers while transforming your enterprise. ServiceNow is how work gets done.