

Global Survey of 2,400 Managers Highlights Major Gap  
Between Workplace Services and Consumer Services

# Today's State of Work: The Service Experience Gap



## To what extent are workplace services automated – and is automation alone enough to close the gap?

### Introduction

The Internet has given rise to a huge number of online consumer services. We can rent a car online, choose from more than 400 million products on Amazon, hunt for a bargain in eBay auctions – and much, much more. We have enormously high expectations of these services – they have to be easy to use, offer the products and services we want, and deliver almost instantly. These consumer services set the benchmark for customer service – in the incredibly competitive digital economy, they win by turning visitors into loyal buyers.

In our 2015 State of Work survey<sup>1</sup>, we asked managers whether there had been a similar revolution in the enterprise. Was requesting a workplace service – such as opening a purchase order or asking for IT support – as easy as buying a book online? The answer was a resounding “no.” Overwhelmingly, these services rely on manual, unstructured tools – rather than the efficient, easy-to-use technology found in leading consumer services.

Our 2016 survey explores this gap in depth. To what extent are workplace services automated – and is automation alone enough to close the gap? How does the front-end user experience compare? Are back-end fulfillment processes comparable – or do workplace services lag far behind consumer services? How are managers affected by the way that workplace services are delivered – and what impact does this have on their ability to drive business forward?

To easily compare consumer and workplace services, we used the survey results to calculate a simple metric called the “**Service Experience Index.**” This index is based on 8 key service characteristics – factors such as how fast services are delivered, how easy they are to use, if they are accessible via a mobile device, whether they give estimated delivery times, and whether they generate status alerts.

The survey covered 2,400 managers in Australia, France, Germany, Singapore, the U.S. and the U.K. Respondents came from all working age groups and from a wide range of industries, business functions and companies.

The results showed a dramatic gap between the services we seek out in our personal lives and those we tolerate at work. Despite significant technological advances that allow for delightful customer-facing experiences like those from Uber, Amazon and Airbnb, most companies are not integrating those capabilities into employee-facing services.

### Methodology

ServiceNow commissioned Lawless Research to design and conduct a study about the state of work in companies with 500 or more employees. The 10-minute survey was fielded between March 25 and April 4, 2016, in Australia, France, Germany, Singapore, the U.S. and the U.K. 2,400 managers who supervise at least one employee and use workplace services completed the survey. Research Now, an independent market research company, hosted the online survey and provided respondents from their panel. The margin of error for the study is  $\pm 2.0$  percentage points at the 95% level of confidence. Tests of significant difference were conducted at the .01 level (99% probability that the difference is real, not by chance).

<sup>1</sup>Today's State of Work: [The Productivity Drain](#)

Managers rate  
**consumer** services  
**103%**  
 higher than  
 workplace services.

Automation is  
 associated with a  
**50%**  
 improvement  
 in the Service  
 Experience Index.

## Survey Highlights

1. **Popular consumer services ranked 103% better than workplace services.**  
 Consumer services outpaced those at work in terms of ease of use, notifications, and speed of delivery. Workplace services fell behind in every category. Consumer services have a “Service Experience Index” of 63, whereas workplace services have an average Index score of 31.
2. **The Service Experience gap is driven by outdated technologies that sap productivity.** Managers reported that they are 5 times more likely to use email, and 5 times less likely to use a mobile app. 7 in 10 say that manual workplace services leave them less time for strategic initiatives, lower their productivity or cause them stress. 8 in 10 say that monitoring email interferes with completing tasks.
3. **Those companies with mostly manual services lag even farther behind.**  
 Only 43% of managers say that these manual services are easy to use, as compared to 79% for consumer services. Even less – 19% – say that these services are delivered quickly, as compared to 65% for consumer services. The Service Experience Index for companies with mostly manual services was only 25, 60% lower than the consumer Service Experience Index.
4. **Automation drove a 50% improvement in the workplace Service Experience Index.** Injecting automation in workplace services starts to diminish the consumer services gap. When a service is automated, 40% more managers say it is easy to request, and nearly 60% more say the service is delivered quickly.
5. **Mostly automated workplace services still contain a lot of manual work.**  
 Only 32% of managers say that they receive notifications of estimated delivery times, as compared to 66% for consumer services. 9 in 10 say that they often or sometimes use email to find out the status of their service request status, even though 3 in 10 order these services online.

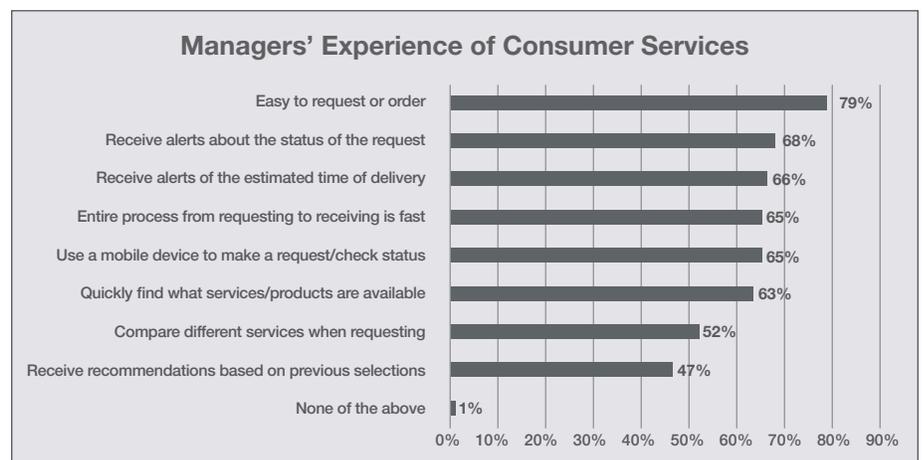
94% of managers said they had experience using automated consumer services – and the majority gave strong positive feedback.

## Automated Consumer Services Deliver a Positive Experience

First, we asked managers about automated consumer services, such as Amazon, Uber and Airbnb. Is the experience a positive one? Do managers find consumer services easy to use, and are they satisfied with the speed of delivery?

Specifically, we asked about these 8 factors – whether:

1. Services are easy to request or order
2. The entire process of the services from request to delivery is fast
3. The services can be accessed via mobile device to request services or check the status
4. It's quick to find what services or products are available
5. Alerts on status of the request are provided
6. Alerts on estimated delivery times are provided
7. It's easy to compare services with others available
8. Recommendations are provided based on previous selections



94% of managers said they had experience using automated consumer services – and the majority gave strong positive feedback:

- 8 in 10 find it easy to request products and services. This shows that consumer services do a good job of optimizing the **front-end consumer experience**. This is supported by other responses. For example, 2 in 3 say they can quickly find out what products and services were available, and 1 in 2 say they can compare different products and services.
- 2 in 3 say that products or services are delivered quickly. This shows that consumer services also have strong **back-end fulfillment processes**, although there is still room for improvement. Again, other responses support this. For instance, 2 in 3 respondents say they receive alerts about estimated time of delivery and the status of their request.

Along with this consumer services baseline, we also looked at how managers perceived workplace services. Are these on a par with consumer services, or do they lag far behind? Do they deliver a consumerized front-end experience, and are the back-end fulfillment processes automated effectively?

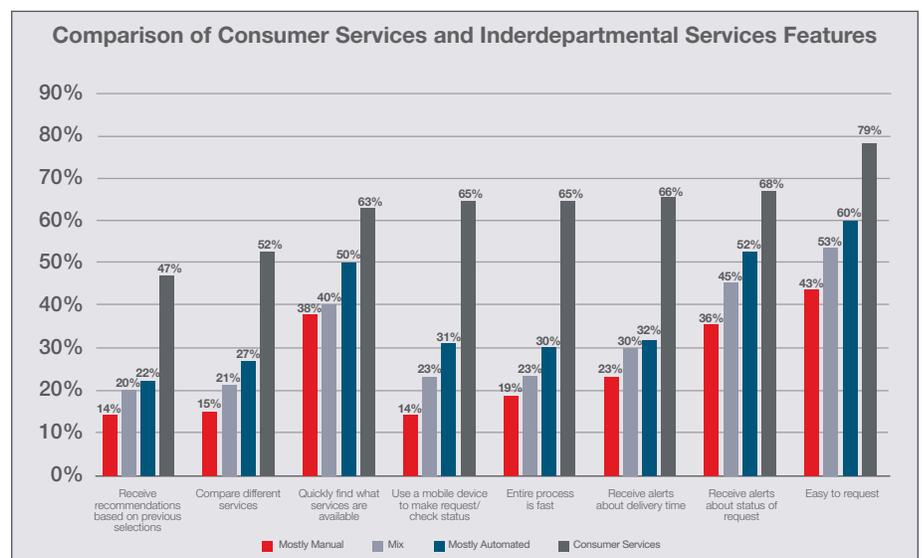
To measure the gap between workplace services and consumer services, we asked managers to rate workplace services using the same 8 criteria we used to measure consumer services.

## The Services Experience Index – Workplace Services Lag Far Behind

To measure the gap between workplace services and consumer services, we asked managers to rate workplace services using the same 8 criteria we used to measure consumer services.

We asked about the most common services, such as opening a purchase order, requesting help from HR, requesting help or equipment from IT, requesting sales materials from marketing, asking legal to review a contract or getting info on HR policies.

Managers also told us whether the workplace services they use are mostly manual, mostly automated or a mix of the two. This let us categorize workplace services into 3 maturity levels, so that we could see the impact of increasing maturity – and how each level compared to the consumer services benchmark.



The results were deeply concerning. Workplace services lagged far behind in all 8 criteria, in most cases only scoring half as well as consumer services. Automation had a positive effect, but still failed to live up to the consumer services gold standard. Manual workplace services performed dismally.

There is a direct relationship between the amount of automation companies inject into their workplace services and the quality of the experience that these services deliver.

To provide a clear measure of the relative service experience, we calculated an overall “Services Experience Index” for each service category. This is a score from 0 to 100. The index is calculated by averaging the percentage score across all 8 criteria. The results confirm the huge gap that exists:

- **Consumer** services had an index of **63**
- Companies with mostly **automated** workplace services had an index of 38
- Companies that said that they had a **mix** of automated and manual services had an index of **32**
- Companies that said they used mostly **manual** workplace services had an index of **25**

From a geographic perspective:

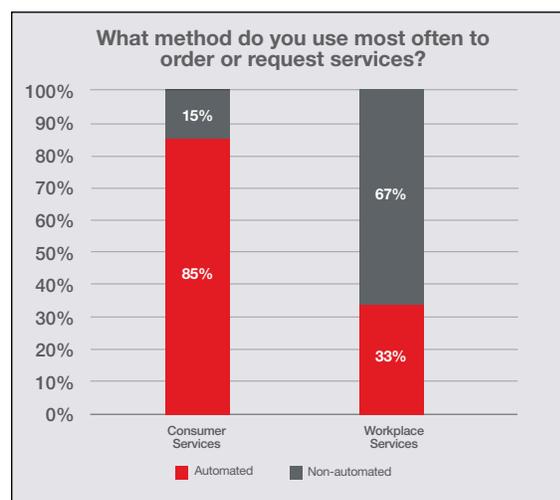
- For consumer services, the **U.S.** had the highest score with 68; **France** had the lowest with 53
- For manual services, **Australia** had the lowest score with 19; **Germany** and **Singapore** ranked the highest with 30

These results show that popular consumer services ranked 103% better than typical workplace services. There is a direct relationship between the amount of automation companies inject into their workplace services and the quality of the experience that these services deliver.

Armed with this overall comparison, we then started to drill into the underlying reasons for this enormous disparity – focusing on both front-end user experience and back-end fulfillment processes.

## Only 3 in 10 Managers Request Workplace Services Online

To find out whether workplace services deliver a consumerized front-end experience, we asked managers how they request these services. Do they request them online – using web portals and mobile apps – or do they still use manual methods such as emails, telephone calls and personal visits? We also asked managers the same question about consumer services.



We found that manual methods continue to dominate workplace services. Only **3 in 10 managers** request these services online, with 7 in 10 still using manual methods. In comparison, more than **8 in 10 managers** say that they request consumer services online.

Modern technology has overtaken email and other legacy approaches, with web portals and mobile apps delivering a far better front-end user experience.

The gap between workplace services and consumer services became even more apparent when we looked at specific request methods:

- Managers are **5 times more likely to use email** when requesting workplace services
- Managers are **5 times less likely to use mobile devices** when requesting workplace services

These results show that workplace services lag far behind when it comes to technology adoption. Email, introduced to the enterprise more than 20 years ago, still accounts for **5 in 10** workplace service requests, even though consumers have widely adopted web and mobile. Workplace mobile adoption lags particularly far behind, with mobile apps used for only **1 in 20** requests.

It is also notable that there is a major generational difference in mobile usage. Millennials are nearly **90%** more likely than Boomers and **33%** more likely than GenXers to use a mobile app to order consumer services. In the workplace, Millennials are 4 times as likely to use a mobile devices to request services as compared to Boomers.

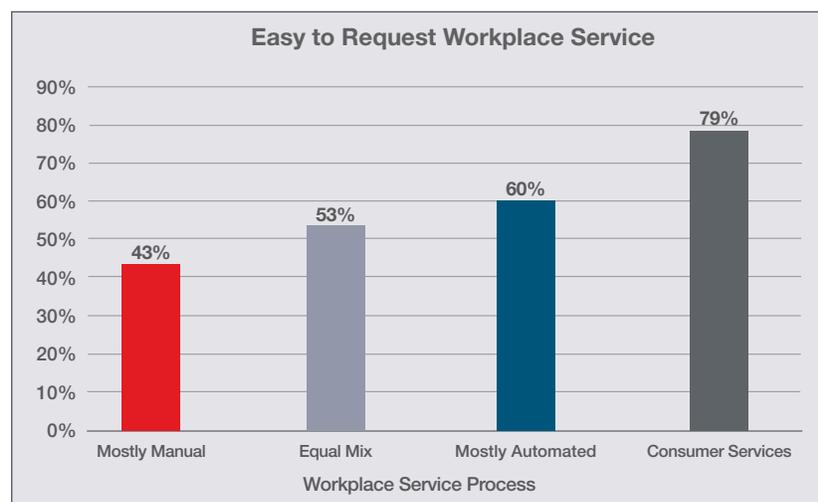
What is the impact of this gap on the user experience? Do managers find it easy to request workplace services manually, or has email been surpassed by modern web and mobile technology?

## Manual Workplace Services Deliver a Poor Front-End Experience

To explore this impact, we asked managers whether the workplace services they used were easy to request, so we could identify any differences between manual and automated approaches. Again, we asked managers the same question about consumer services.

The results were enlightening:

- Only **4 in 10** managers say that manual workplace services are easy to request
- This number increased to **6 in 10** managers for automated workplace services
- Consumer services came out on top, with **8 in 10** saying these services are easy to request



This clearly shows the benefits of automation. Modern technology has overtaken email and other legacy approaches, with web portals and mobile apps delivering a far better front-end user experience.

Given an increasingly mobile workforce and the entry of mobile-savvy Millennials into management ranks, this gap points to one of the sharpest divergences between consumer expectations and the reality of today's workplace services.

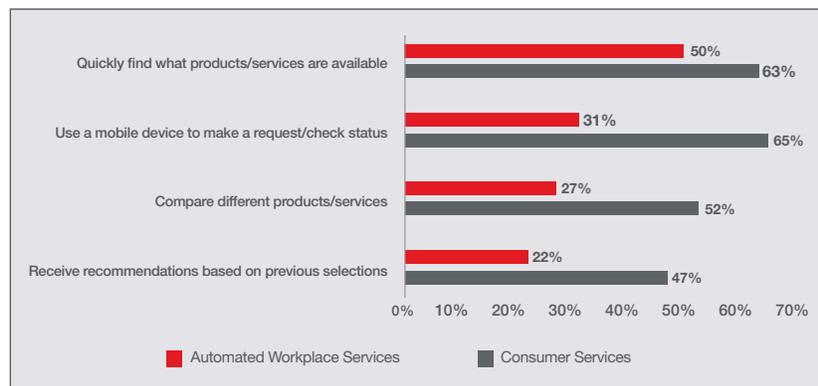
## Front-End Automation Is Not Enough

However, even when workplace services are automated, they still fall short of the benchmark set by consumer services. Why?

In our previous 2015 survey, **3 in 4** managers said they wanted simple, self-service support processes that are as easy to use as FedEx or Amazon, with **9 in 10** saying this would make them more productive. However, these types of consumer services are not just automated – they are consumerized. Companies such as Amazon focus on the user experience, with the overriding goal of turning visitors into buyers. It is not enough to put a list of products and a shopping cart on a website. For example, consumers want to easily search for and compare products, and to check out in seconds.

This is often not the case with workplace services, even when they are automated. For instance, our 2016 survey results show that with automated workplace services:

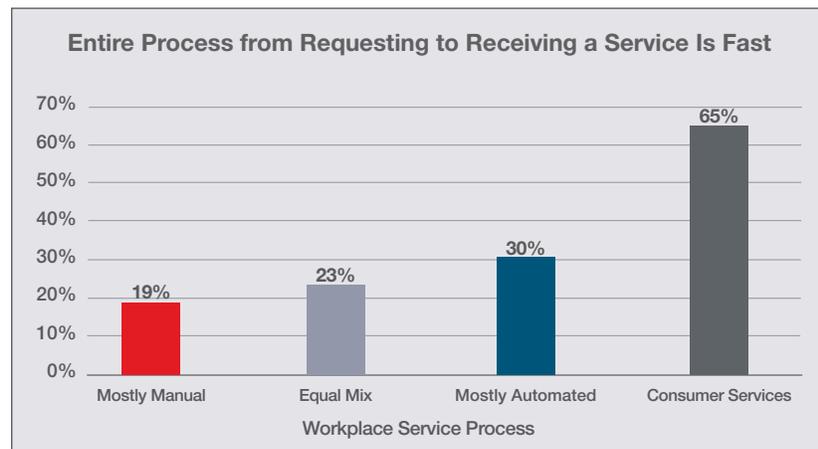
- Only **50%** of managers say that they can quickly find what products or services are available, versus more than **63%** for consumer services. While this may not look like an enormous gap, there are only a limited number of workplace services whereas consumer sites often list millions of products. Despite this, managers still find it easier to find what they want on consumer sites.
- Only **31%** of managers say they can use mobile devices to request workplace services, compared to **65%** on consumer sites. Given an increasingly mobile workforce and the entry of mobile-savvy Millennials into management ranks, this gap points to one of the sharpest divergences between consumer expectations and the reality of today's workplace services.
- **27%** say they can compare offerings when requesting workplace services, and only **22%** say they can receive recommendations based on previous selections. In comparison, **52%** say they can compare products on consumer sites, and **47%** say they receive recommendations.



To reap the full benefits of automation, processes also need to be optimized.

## Back-End Workplace Fulfillment Processes Are Slow

Having characterized the front-end user experience gap, we then turned our attention to the back-end fulfillment of workplace services. To do this, we asked managers whether the entire process from requesting to receiving a workplace service was fast. We also asked the same about consumer services.



- Only **19%** of managers said that manual workplace services are delivered quickly
- This number only increased to **30%** of managers for automated workplace services
- Consumer services were the clear winner, with **65%** saying delivery was fast

The result for manual workplace services echoed what we found in our [2015 State of Work Survey](#). At that time, the majority of managers said that slow delivery of workplace services caused significant delays in the work. Depending on the workplace service and geographic region, the number of managers reporting delays ranged from 66% to 85%.

As we noted in our 2015 survey, the problem with emails, phone calls and personal visits is that they do not drive an end-to-end process. Once a request is submitted, there is no easy way of tracking it, or of identifying when a request is stalled. When fulfillment spans multiple departments, there is no structured way to pass the request from department to department – with managers often involved in shepherding their request through the organization.

Our 2016 survey results highlighted the impact of manual workplace services on managers. **7 in 10** reported that they were negatively affected, with issues including less time for strategic initiatives, lower productivity and stress. Clearly, these manual processes are a major drag on the enterprise, preventing managers from driving the business forward both operationally and strategically.

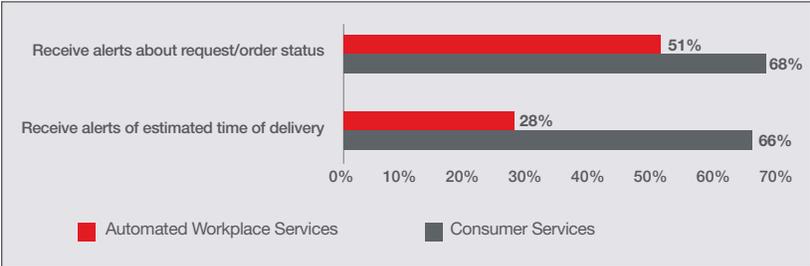
Collaboration combined with automated documentation is key to fulfillment.



## Automated Back-End Fulfillment Processes Still Need to Be Improved

It was surprising that automated workplace services still did not close the gap with consumer services. There was an improvement compared to manual fulfillment, but the results still left much to be desired.

We believe that this gap may be due to the way that back-end fulfillment processes are automated. First, any process can be automated – whether it is good or bad. If enterprises simply automate their existing inefficient or shoddy fulfillment processes, then they will only see limited benefits. To reap the full benefits of automation, processes also need to be optimized. Second, automation needs to bring both visibility and control. Fulfillment processes must be tracked, but there also must be clear **service-level agreements**, accompanied by **automated escalations** when requests are delayed or run into issues.

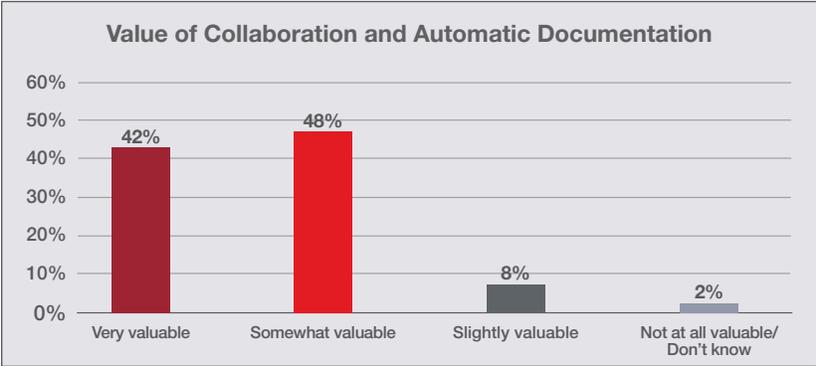


Our survey results show that enterprises are making progress on visibility, but may still be struggling with control. For example, **5 in 10** managers who use automated workplace services say they receive status alerts, as compared to almost **7 in 10** for consumer services. On the other hand, only **3 in 10** managers say that they receive alerts of estimated delivery times, with consumer services again coming in at almost **7 in 10**. This indicates that enterprises do a better job of tracking workplace service fulfillment than they do of controlling fulfillment processes – although, in both cases, they still fall short of consumer services.

We specifically focused on collaboration capabilities, combined with automatic tracking and documentation of requests as they made their way through the fulfillment process.

### Collaboration Combined with Automated Documentation Is Key to Fulfillment

We wanted to know whether there were specific ways to improve workplace service fulfillment processes. We specifically focused on collaboration capabilities, combined with automatic tracking and documentation of requests as they made their way through the fulfillment process. This could mean a request to create a marketing asset, such as a white paper or graphic. The team could have a common record to post new versions of documents and receive status alerts when there's been an update. To do this, we first asked respondents whether they were responsible for providing workplace services, as opposed to just being users of these services. Once we had identified this provider group, we then asked them whether a combination of collaboration and automatic documentation would be valuable.



The response was overwhelmingly positive. Among 1,083 respondents who provided workplace services, **9 in 10** say that the combination of collaboration and automatic documentation would be very valuable or somewhat valuable. This confirms that managers see the profound benefits of automation, and that instant communication was also essential to get information and solve problems when driving fulfillment processes forward.



By automating workplace services, companies can increase the productivity of their managers, allowing them to focus on high-value work that moves the business forward.

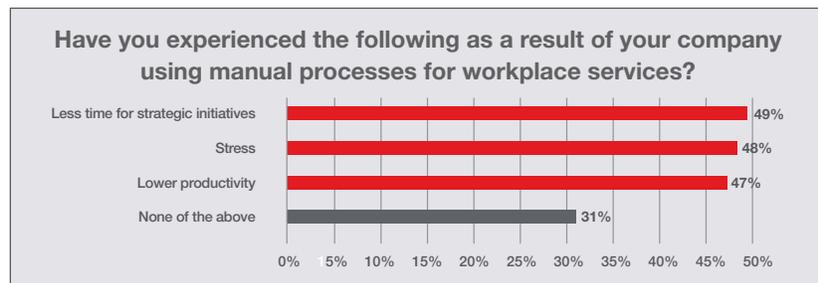
## Industry-Specific Insights

- Financial services respondents were more likely to have automated processes (41% v. 32% of all top industries); however, 30% of financial services firms say their workplace services are still mostly manual
- Government and public sector respondents had the highest percentage of mostly manual services with 43%
- The tech industry was most likely to use mobile apps to order workplace services (16% v. 5%) and least likely to use email to request services (35% v. 47%)

## The Productivity Penalty of Relying on Email for Workplace Services

Finally, we explored the impact of manual workplace services on productivity, focusing on the most commonly used method – email. We specifically looked at tracking the progress of workplace service requests, since our 2015 survey showed that progressing a service request could require a manager to engage in 10 or more interactions.

First, we asked managers whether they were negatively affected when workplace services were delivered manually. What was the impact on their work, and how did it affect them personally?



The vast majority of respondents – **7 in 10** – say that they are negatively affected. From a work perspective, they experience lower productivity and have less time for strategic initiatives. **5 in 10** say that manual workplace processes cause them personal stress.

Next, we asked managers to what extent they use email to track workplace service requests. The results were consistent with the way that they request these services. **9 in 10** said that they often or sometimes use email to track status.

Given the high level of email use, we wanted to know how email affects managers' work. A resounding **8 in 10** said that the need to monitor email interferes with their ability to complete tasks. Furthermore, the majority said that they spend 3 or more hours a day on email during normal working hours, and **5 in 10** say they spend an hour or more on email after their normal working day.

Email places a huge burden on managers, and manual workplace services are a key part of this problem. That said, email itself is not the enemy. It is a symptom of a broken process that waylays corporate productivity. At work, firms expect employees to manually push services forward with email, wasting precious time chasing work status and searching inboxes.

By automating workplace services, companies can increase the productivity of their managers, allowing them to focus on high-value work that moves the business forward – rather than being mired in what should be routine administrative tasks.

By consumerizing workplace services, firms can dramatically enhance the service experience for service users – and for those who provide these services.

## Recommendations from ServiceNow

**This gap can be closed in five steps.** Organizations can easily streamline and automate their workplace services today. The technology to do this already exists. By consumerizing workplace services, firms can dramatically enhance the service experience for service users – and for those who provide these services. Nearly every part of the organization provides workplace services, so the opportunity to increase productivity is immense.

1. **Identify work tasks that require coordination among employees or across departments.** Target those coordination activities that currently use email, team rooms or phone calls. Consider typical interdepartmental processes that require heavy coordination, such as employee onboarding and offboarding.
2. **Outline the coordination process and then define what it should be.** Start by identifying the requesters, fulfillers and approvers, and then define the rules or logic that the process should follow. For example, when a new employee starts, there's a long list of activities that need to get done – such as arranging for a workspace, credit card, security access and phone. These activities involve multiple departments – such as HR, IT, facilities and finance. The key here is to map out the optimal, most efficient way the service should be run. In a perfect world, who should be the approvers? What parts can be removed from or need to be added to the workflow?
3. **Design an intuitive, frictionless interface for employees.** The user interface is as important at the back-end delivery of the service. Make sure employees can engage with that workplace service in a natural, intuitive way. If the interface is not as easy to use as email – or easier – there's likely too much friction. Then, enhance the experience with front-end consumer features. These can include alerts, comparisons and recommendations to improve the employee experience.
4. **Tap into consumer-like techniques such as portals, workflows and catalogs.** Firms should expose the right information and create a standard, consistent way for employees to request and fulfill services. This parallels the online portals, one-click shopping carts and online delivery tracking that employees enjoy in their personal lives. For services such as onboarding, use workflows to track the status of each activity and remind people automatically if they are behind schedule. If an activity is stalled, configure the workflow to escalate this automatically. Workflows can also eliminate some manual processes entirely – for example, they can create email accounts, and even update HR and finance systems automatically.
5. **Track and analyze services.** Service management software turns a coordination process into an automated service workflow that produces metrics on service delivery. This gives managers insight into how well services are delivered and pinpoints where there need to be tweaks to the service. This is how consumer services continue to delight their customers.

By adopting service management software and practices, organizations can transform the employee experience, making it as easy and enjoyable to get work done at the office as it is at home. Early adopters have already shown that this approach increases corporate productivity, as described in this [IDC study](#).

Workers have to leave their 21st century lives at the door when they go to work.

## Conclusion

Today, online consumer services are easy to use, delivering products and services quickly and efficiently. Most companies have a maniacal focus on the experiences of their customers, pulling out all the stops to build both satisfaction and loyalty. They realize that it is very easy for a customer to take their business elsewhere.

Companies aren't applying those same principles to their internal-facing experiences. The workplace still relies mainly on email, first popularized in the 1990s. In effect, workers have to leave their 21st century lives at the door when they go to work.

The majority of managers don't find workplace services as easy to use as services in the consumer world. They also complain about long delivery times, and say that these manual processes lower their productivity and prevent them from focusing on more important work. Unlike the consumer world where they can switch to a competing site when dissatisfied, at work they have little recourse. If they don't like working with the HR department, there's no alternative.

Managers are telling us that automation is the way forward. By automating workplace services, enterprises can create a better user experience and accelerate service delivery – freeing up skilled and experienced management resources to drive business growth and profitability.

However, our results also show that automation alone is not enough. To close the gap, enterprises need to truly consumerize their workplace services. Just putting services on a webpage isn't the answer. Consumerization means focusing on the front-end user experience, creating an intuitive self-service portal where managers can easily find and request the services they need. It also means creating efficient back-end fulfillment processes – including well-defined service-level objectives and escalation processes – rather than just using automation to simply track existing processes. To do this, enterprises need to make the right automation technology choices, and then leverage these capabilities to their full potential.

Organizations can close this gap today.

