Improve self-service with ServiceNow

How to create effective self-service channels and increase consumer adoption

What’s in this Success Playbook

This Success Playbook will help you build smart, effective approaches to the design, implementation, and maintenance of your self-service channels. You’ll learn how to:

• Target the right opportunities for self-service improvement
• Design an effortless self-service experience
• Make self-service success an organizational priority
• Build momentum for self-service adoption

Key takeaways

The most important things to know

• Make the self-service user experience effortless. Focus on a small number of key interactions in the user journey where user experience is won or lost.
• Prioritize self-service improvement and maintenance. Define measurable goals for self-service and make it a priority for your service teams.
• Nudge users to adopt self-service. Help users overcome change inertia through a variety of tactics, from branding to the use of key influencers.

The payoff of getting this right

A typical self-service interaction can be 98% less expensive than a phone- or email-based interaction—meaning that your organization can save millions of dollars by moving more support requests to self-service.
What you need to get started
Prerequisites
You need to understand your current self-service offerings and adoption rates.

Playbook overview
Follow these stages to build, grow, and sustain your organization’s self-service capabilities:

Stage 1 – Assess your opportunities for self-service improvement
Stage 2 – Design for an effortless self-service experience
Stage 3 – Make improving self-service an organizational priority
Stage 4 – Build momentum for self-service adoption

Note: Although this playbook focuses on self-service for internal employees, the insights are equally applicable to improve self-service for external customers (end users), partners, and prospects. Service consumers: For this playbook, we consider service consumers to be internal employees and ServiceNow customers who need to request services from the organization’s internal support groups, such as HR and IT.

Terms and definitions
Service Portal – The Service Portal is an alternative to content management systems and a simple way to create a mobile-friendly self-service experience for end users. It provides a unified, intuitive way to access all applications, including the service catalog, knowledge base, communities, and chatbots.

Knowledge Management – The Knowledge Management application lets you share information in knowledge bases. It helps you create, categorize, review, and approve articles. Users can search and browse articles as well as provide feedback.

ServiceNow Communities – This app is available for customers who have ServiceNow Customer Service Management. The Communities application lets customers connect and engage employees, customers, partners, and prospects so they can get quick responses to their issues by posting questions, reviewing blogs or videos, and searching for previous discussions. Our New York release includes new features like featured content, user mentions, emailing community users, moving forum content, and quick start tests.

Service Catalog – The ServiceNow Service Catalog is an end-user application that service consumers can browse and use to request individual goods, services, or information.

Self-service fundamentals
Before you get started, familiarize yourself with these self-service fundamentals.
Self-service defined
Self-service is the ability of a service consumer to resolve their issues and needs without having to call support. Self-service solutions can include everything from using simple FAQ pages, knowledge base articles, and the Service Catalog to complex humanlike chat sessions.

With the advancements made in IT and business process automation, self-service has expanded from simply sharing knowledge with consumers to conducting complex, automated operations, like password resets, without any human interaction.

Self-service benefits
Accustomed to the conveniences offered by technology today, customers demand immediate, relevant, and effortless solutions to their requests. Self-service is an effective way to make this happen. Forrester Research indicates that “two-thirds of customers say valuing their time is the most important thing a company can do to provide them with good service.”

Additionally, organizations can save millions of dollars if customers and employees choose to self-serve. Also, according to Forrester Research:

- A typical self-service interaction costs less than $0.10
- A phone interaction averages $6 to $12
- Online web chats and email responses can cost up to $5

Why does self-service fail?
Self-service success isn’t just about making the technology available. Organizations have to take a programmatic, customer-centric approach that looks at how people work and where self-service can deliver the greatest gains in satisfaction and productivity.

This approach requires organizations to:

- Understand the productivity needs of service consumers
- Encourage consumers to adopt self-service solutions
- Monitor self-service usage and needs
- Update solutions as needed
Figure 1: A complete root cause analysis of why organizations struggle to make self-service successful
Stage 1 – Assess your opportunities for self-service improvement

Effective self-service is a matter of good design and maintenance. Start by understanding your organization’s self-service objectives, customer needs, and opportunities for automation. Objectively assess your self-service failure points as well as your improvement opportunities.

KEY INSIGHTS

- Create a small set of metrics to objectively define your self-service goals.
- Use interviews to identify where the pain points are in your service consumers’ key interaction with request fulfillment.
- Visually analyze potential self-service use cases based on their business value, value to the service consumer, complexity, and cost.

Successful self-service reduces both your service consumers’ pain points and the number of service requests made by phone or email. Many organizations assume that self-service opportunities are simply a matter of technology, but that approach leads to low adoption.

To avoid that pitfall, start with an objective analysis of your organization’s self-service improvement opportunities based on the business benefits you expect and the perceived consumer value. Following these steps will help you objectively assess your self-service failure points and improvement opportunities.

Step 1: Define your self-service outcomes

Don’t look at self-service in isolation. To capture the benefits of self-service, be sure to define measurable outcomes and align them with your strategic goals for the Now Platform®. Your strategic goals might include improving employee experience, improving service desk efficiency, or fast-tracking issue resolution.
### Table 1: Common self-service outcomes and related strategic goals

<table>
<thead>
<tr>
<th>Strategic Outcomes</th>
<th>Self-Service</th>
<th>Metrics Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve service desk efficiency</td>
<td>Increase case deflection</td>
<td>The rate that users resolve individual issues using self-service channels instead of calling the support desk</td>
</tr>
<tr>
<td>Improve employee experience</td>
<td>Minimize customer effort</td>
<td>Measures how easy it is for service consumers to get what they need</td>
</tr>
<tr>
<td>Faster issue resolution</td>
<td>Reduce time to resolve</td>
<td>Measures how quickly users can get the help they need</td>
</tr>
</tbody>
</table>

Use these self-service outcomes as your North Star for analyzing demand and prioritizing use cases.

ServiceNow® customers have access to out-of-the-box Incident Management Performance Analytics solutions that process owners can use to visualize incident self-service adoption and conduct in-depth analyses. These things will help identify opportunities for improvement. You can see an example of this in Figure 2.

Figure 2: An in-platform solution to analyze self-service performance
Step 2: Build a (measurable) understanding of the service consumer journey

To get to self-service that works, it’s important to understand who your service consumers are, what their expectations and needs are when it comes to service request fulfillment, and what success looks like for them.

Understand the service consumer journey

Begin with an initial understanding of the service consumer journey. Engage service process owners, experienced support reps, and subject matter experts to build an initial understanding of your service consumers’ journey.

Use the questions below to capture your findings:

- Who are your service consumers?
- What outcomes do they expect to enable through the service (e.g., less time on tasks, lower error rates)?
- What triggers their service need? Is it on a schedule or initiated by some external event?
- What process or workflow does a typical consumer follow to solve for their service need?
- What risks are associated with the service request from both the consumer’s and the organization’s perspective?
- What would be the ideal experience for the consumer? How do you envision them talking about the solution once it’s live? Will they possibly write a tweet about the success of this self-service use case?

Not all service consumers need or expect the same things. We’ve found that the most successful ServiceNow customers generate persona types that capture information on consumers’ request motives, personal preferences, work profiles, and psychographics. See Figure 3 for a persona example of a consumer who frequently travels.
Figure 3: Persona of a service consumer who frequently travels

**User journey maps**

Next, employ user journey maps to discover where self-service can succeed (or fail). Chalk out the step-by-step user journey from the time the service need arises until it’s resolved. As you do this, be sure to provide insight into why service consumers switch away from (or toward) self-service. Also outline where self-service paths can break down.

When you create effective journey maps, you can see where the majority of channel switching, or abandonment happens. Then you can invest heavily at these points. See Figure 4 for examples of a service consumer making a request.
### Key Interactions in Consumer Journey

<table>
<thead>
<tr>
<th>Key Interaction</th>
<th>Attributes</th>
</tr>
</thead>
</table>
| 1. Access Service Portal | • Easy to find  
• Available on mobile  
• SSO enabled  
• Preloaded profile description |
| 2. Browse Catalog | • Simple navigation  
• Relevant catalog items  
• Simple language  
• Information completeness |
| 3. Make the Request | • Limited data input needs  
• Clear next steps  
• Highlights what to expect |
| 4. Request Fulfilment | • Auto-alerts on the progress made  
• Automated Approvals |

**Figure 4: Sample key interactions in the service consumer journey**

**Identify measurable attributes**

Identify measurable attributes that shape the self-service experience at each key interaction where the majority of channel switching, or abandonment happens. Assess each key interaction to understand the attributes that help enable self-service (like availability of self-service options on mobile devices) and those that are getting in the way of self-service. Figure 5 shows a sample analysis template you can use to identify the right attributes for each interaction point.
Along with engaging internal SMEs and stakeholders, use a combination of user observations, interviews, and survey techniques (see below for sample questions) to generate user personas and identify the key integration points and attributes that shape the self-service experience.

### Sample service consumer interview questions

- What do you immediately do when you need to do ____________?
- Where do you look for alternatives?
- I saw that you did __________. Can you explain what you were trying to accomplish?
- What do you do when you get stuck on a screen or a step in the process?
- Can you walk me through the ____________ process again?
- Where do you most often bump into challenges when trying to complete __________?
- What frustrates you most about your current process?
Step 3: Evaluate opportunities for automation to prioritize high-ROI use cases

Given its benefits, you might feel the urge to make everything self-service. But not all service use cases are well suited to deliver a good self-service experience, especially when you have constraints in simplifying and automating the service workflow.

To prioritize and invest in the right self-service use cases, analyze each based on:

- Its expected self-service value for the business and the customers
- The complexity of implementing self-service, which is determined by the sequence of activities required to complete a service request, such as generating records, getting approvals, or running scripts

Create an objective, consistent method to measure the expected value and complexity for all your self-service use cases. Then visually analyze them to highlight your quick wins and automation needs.

Figure 6 shows a sample prioritization matrix you can use to visually analyze your self-service improvement opportunities.

![Prioritization matrix to visually analyze self-service improvement opportunities](image-url)

*Figure 6: Prioritization matrix to visually analyze self-service improvement opportunities*
The expected value from self-service use cases depends on how well they align with your self-service outcomes (defined in Step 1) and your findings from the customer journey analysis (Step 2).

The solution complexity depends on the number of activities, types of activities (such as approvals that require human oversight), user input requirements (such as user-specific data that service consumers need to provide), and the security and data risk (including regulation and compliance risks).

Resist the urge to prioritize based on a first-come-first-served basis or according to whomever has the loudest voice. Instead, when you evaluate your expected self-service value and solution complexity, use a closed-ended scorecard with mutually agreed upon evaluation factors and criteria like the one shown in the table below.

### Expected Self-Service Value (For the Business and Customers)

<table>
<thead>
<tr>
<th>Factors That Drive Self-Service Value</th>
<th>Description</th>
<th>Sample Impact Scoring Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost savings per request</td>
<td>Change in people, process, and technology cost of serving users through self-service vs. traditional channel</td>
<td>□ 1-Low: &lt; $5&lt;br&gt;□ 2-Medium: $5–10&lt;br&gt;□ 3-High: $10+</td>
</tr>
<tr>
<td>Frequency of request</td>
<td>Volume of support requests/calls received per week</td>
<td>□ 1-Low: &lt; 3 requests/week&lt;br&gt;□ 2-Medium: 3-10 requests/week&lt;br&gt;□ 3-High: 10+ requests/week</td>
</tr>
<tr>
<td>Number of service consumers impacted</td>
<td>Number of service use-case customers</td>
<td>□ 1-Low: &lt; 40% (or no group/function-level impact)&lt;br&gt;□ 2-Medium: 40–60% (or group/function-level impact)&lt;br&gt;□ 3-High: $10+</td>
</tr>
<tr>
<td>Time to resolution improvement</td>
<td>Time from service need identification to fulfillment</td>
<td>□ 1-Low: No charge&lt;br&gt;□ 2-Medium: Small improvement&lt;br&gt;□ 3-High: Significant improvement</td>
</tr>
<tr>
<td>Customer effort improvement</td>
<td>Expected change in service consumer’s perception of how easy or hassle-free it was to get what they need</td>
<td>□ 1-Low: No charge&lt;br&gt;□ 2-Medium: Small improvement&lt;br&gt;□ 3-High: Significant improvement</td>
</tr>
</tbody>
</table>

**Overall expected self-service value (average value)**
### SOLUTION COMPLEXITY SCORE

<table>
<thead>
<tr>
<th>FACTORS THAT DRIVE SOLUTION COMPLEXITY</th>
<th>DESCRIPTION</th>
<th>SAMPLE COMPLEXITY SCORING SCALE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk</td>
<td>Highlights any sort of risk associated with the service workflow, including security, data integration, regulation, compliance, and information privacy concerns.</td>
<td>☐ 1–Low  ☐ 2–Medium  ☐ 3–High</td>
</tr>
<tr>
<td>Interdependencies with other applications</td>
<td>Highlights the number of multiple difference applications or databases the solution workflow touches to resolve the service request.</td>
<td>☐ 1–Low  ☐ 2–Medium  ☐ 3–High</td>
</tr>
<tr>
<td>User input requirements</td>
<td>Capture the volume of information/data the user needs to provide to fulfill the service request</td>
<td>☐ 1–Low  ☐ 2–Medium  ☐ 3–High</td>
</tr>
<tr>
<td>Number of approvals needed</td>
<td>Highlights the number of approvals that require human oversight to process</td>
<td>☐ 1–Low: 0-2 approvals  ☐ 2–Medium: 3-5 approvals  ☐ 3–High: 5+ approvals</td>
</tr>
</tbody>
</table>

**Overall solution complexity score (average value)**

**Table 2: Self-service use case prioritization scorecard**

In the next table, you’ll see an example of a completed scorecard for a **self-service password reset** use case.

**Note**: The factors that drive the expected self-service value, along with the scoring scale, are unique to each organization. These depend on your overall service goals, business processes, and customer pain points. Get together with your key stakeholders and SMEs to come up with a self-service use case prioritization scorecard that aligns with your organizational context.
### Expected Self-Service Value (For the Business and Customers)

<table>
<thead>
<tr>
<th>Sample Use Case 1: Password Reset</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost savings per request</strong></td>
<td>![1–Low: &lt; $5] 2–Medium: $5–$10</td>
</tr>
<tr>
<td><strong>Frequency of request</strong></td>
<td>![1–Low: &lt; 3 requests/week] ![2–Medium: 3-10 requests/week] ![3–High: 10+ requests/week]</td>
</tr>
<tr>
<td><strong>Number of users impacted</strong></td>
<td>![1–Low: &lt; 40% (or no group/function-level impact)] ![2–Medium: 40-60% (or group/function-level impact)] ![3–High: 70%+ (or enterprise-level impact)]</td>
</tr>
<tr>
<td><strong>Time to resolution improvement</strong></td>
<td>![1–Low: No change] ![2–Medium: Small improvement] ![3–High: Significant improvement]</td>
</tr>
<tr>
<td><strong>Customer effort improvement</strong></td>
<td>![1–Low: No change] ![2–Medium: Small improvement] ![3–High: Significant improvement]</td>
</tr>
</tbody>
</table>

**Overall score** High
Table 3: Prioritization scorecard for a password reset

Don’t limit your focus to low-complexity self-service use cases. Instead, continuously invest in automating IT and business processes to prioritize use cases that help improve the service experience and reduce support costs.

Get inspired by these successful self-service use cases commonly deployed by ServiceNow customers.

Table 4: Common self-service use cases that ServiceNow customers have implemented
Related resources

- Out-of-the-box Knowledge Management Performance Analytics solutions
- How do I create effective user personas?
- How do I create effective journey maps?
Stage 2 – Design for an effortless self-service experience

Service consumers expect an easy, intuitive solution to their requests. Design your self-service experience to minimize effort first, delight your consumers second.

KEY INSIGHTS

• Instead of focusing on consumer delight, focus on making self-service effortless.
• Take a mobile-first approach when designing the user interface.
• Build in advanced search capabilities to help users find what they need faster.
• Use in-context personalization to highlight relevant needs.

Self-service is a choice for users. A satisfactory user experience—often misinterpreted too narrowly as providing pleasing aesthetics or graphic design—isn’t sufficient to drive lasting self-service adoption. To get your people on board with your solution, you need to deliver an effortless experience, one that lets users achieve their desired outcomes with minimal effort using an intuitive, easy-to-use interface. To reach this goal, you need to measure the effort your consumers put toward accomplishing tasks.

**Measure consumer effort**

Based on [research from Gartner](https://www.gartner.com), reducing the work that consumers must do to get their problem solved is a much better indicator of customer loyalty than customer satisfaction or net promoter score. The customer effort score is measured by asking a single question: “How much effort did you personally have to put forth to handle your request?” It’s scored on a scale from 1 (very low effort) to 5 (very high effort).

To identify the areas you need to improve, conduct an in-depth effort audit by analyzing the customer effort score alongside measures such as repeat calls, transfers, and channel switching.

**Step 1: Design for an intuitive, easy-to-navigate user experience**

When service consumers go to service reps for help, they’re typically not asked to choose from a long menu. But when they try to self-serve, they’re often handed a long taxonomy to navigate, or they’re asked to run through multiple, confusing forms to get to their desired outcome.
Effective self-service solutions provide an intuitive user interface that minimizes both the effort of navigation and the mental effort required to understand jargon-heavy forms.

**Make self-service easy to find and access**

Often consumers are required to go through different platforms to access individual self-service applications like HR, IT support, or finance. Or they have to browse through multiple solutions that may include the knowledge base, videos, communities, and service catalog. Effective approaches create a single portal, like the Service Portal, that houses references to all the self-service solutions and content across the organization.

The self-service experience must be smooth—not just in terms of look and feel but also in terms of access. We encourage our customers to configure the Service Portal based on corporate branding and to incorporate single sign-on (SSO) so users don’t have to remember multiple passwords or enter a password multiple times.

Here are two great examples from ServiceNow customers.

![Figure 7: A configured ServiceNow Service Portal customer example that provides unified access](image)
Incorporate design principles that provide a human-centered experience

Instead of focusing only on aesthetics, ensure users can easily find and act upon what they’re looking for. See below for suggested design principles.

<table>
<thead>
<tr>
<th>Principles of an intuitive, human-centered design</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Less is more</strong> – Instead of trying to provide all possible options, declutter the page to highlight the most relevant solutions and information.</td>
</tr>
<tr>
<td>2. <strong>Speak in the consumer’s language</strong> – Avoid all jargon and use simple, nontechnical language to name and explain services.</td>
</tr>
<tr>
<td>3. <strong>Clearly signal users’ next steps</strong> – Highlight each anticipated next step for the user.</td>
</tr>
<tr>
<td>4. <strong>Make switching between pages and applications easy</strong> – Use menu tabs so users can switch between pages with one click instead of having to press a back button multiple times.</td>
</tr>
<tr>
<td>5. <strong>Include interactive filter navigation</strong> – Instead of making users go through a taxonomy, allow them to filter and search for relevant choices.</td>
</tr>
</tbody>
</table>
Make self-service mobile ready

Because people expect to access everything using a smartphone, it’s paramount to design for a good mobile experience. Instead of optimizing for a web experience and then trying to replicate it on mobile devices, design for mobile first and then apply the same principles to your web platforms.

The ServiceNow Service Portal uses a page that enables responsive mobile optimization and allows customers to organize content to design meaningful service portal experiences.

Figure 9: ServiceNow Service Portal page layout (out-of-the-box)

While the mobile-first approach is extremely powerful in creating a good omni-channel experience, not all service use cases are best suited for mobile. For example, use cases that require users to fill long forms are not well suited for mobile. Before offering self-service use cases on mobile, carefully evaluate what the mobile experience will be like.
Figure 10: Mobile experience on the ServiceNow Service Portal (custom design)

**Step 2: Configure advanced search capabilities**

With many different solutions put together, a service portal can get very busy and cluttered with technical taxonomy. A good **search functionality** goes a long way in helping people get what they need fast.
The advanced Zing text indexing and search engine from ServiceNow allows customers to configure contextual search to refine type-ahead suggestions and provide “Did you mean?” suggestions so users have a more Google-like search suggestions experience. While these are functionalities very valuable, for a good self-service search experience you also need:

- **Resource titles and descriptions that match your users’ language** – Users don’t always know the technical terms or industry jargon of what they’re looking for. For a seamless search experience, title and describe resources in terms of how users address them. Make good use of the meta tags in knowledge articles to add additional terms that users don’t necessarily see in the descriptions but that are commonly used as search terms.

- **Good knowledge management practices** – If the knowledge base is cluttered with unmanaged, duplicate, and redundant information, good search technology is of limited help. (See Stage 3, Step 2 for disciplined knowledge management practices.)

- **User access rights defined based on relevance** – Often, search results include links to resources that aren’t applicable to the user. Instead, carefully define user rights for all your resources based on relevance and only display records that users can access.

For more details on what to consider when building a good, searchable knowledge base, refer to our Success Playbook on how to Knowledge management for HR.
Step 3: Use personalization to solve for relevant needs

Personalization shouldn’t be superficial, but it should eliminate irrelevant information, offerings, and catalog items to reduce the effort of browsing through your service portal. An effective solution will anticipate user needs and focus on providing in-context services proactively.

Use the personas and user journey analyses from Stage 1 to design tailored user experiences. The Now Platform lets customers configure user criteria for the Service Portal so they can provide a customized service page, widgets, and search results.

![ServiceNow Service Portal](image)

The system is contextually aware of the user’s approvals/requests.

Popular items are tied to the user’s role in the organization.

Figure 12: A personalized ServiceNow Service Catalog experience (out-of-the-box)
Many support calls are made for known issues. Instead of waiting for the user to ask, use push notifications and Service Portal announcements to proactively alert users of relevant events and
issues. (See Figure 14 for an example.) Allow users to also configure personal notifications to organize their views based on their preferences.

Figure 14: Service portal announcements and notifications (out-of-the-box)
The next wave of self-service: Chatbots

Chatbots are artificial intelligence systems that interact with users via messaging, text, or speech using sophisticated natural language processing algorithms to simulate human conversations. According to a report by Grand View Research, 45% of users prefer chatbots as the primary mode of communication for customer service activities. In fact, based on a survey conducted by ServiceNow, 92% of HR teams think that, in the future, chatbots will be the natural way for employees to find the information they need. Most chatbot customers want to enjoy the benefits of always-on customer service, easy or effortless communication, and getting instant responses to their requests.

Consider deploying chatbots for:

- Requests with a well-known or predicted solution – Chatbots perform well with solutions that follow a defined decision tree. For example, your benefits FAQs might start with this question: “Which health plan is more suitable for my needs?”

- Requests with multiple steps – Browsing through long online forms or websites can be daunting. However, with natural language processing, a chatbot can handle instructions with multiple data points as one step. For example, a user might ask, “Can you reschedule my flight to Santa Clara to next Wednesday for 3 pm and get me an aisle seat?”

- Reminders and alerts with a follow-up action required – Chatbots eliminate the need for the user to log in to an app or website to complete follow-up steps, reducing the customer response rate. For example, when a user asks about a purchase request, the chatbot could answer, “The laptop configuration you requested is no longer available. Would you consider getting an alternate configuration?”

Now Platform has expanded on Virtual Agent capabilities by offering Natural Language Understanding (NLU), topic categories, and reusable topic block for easier topic management, messaging integration with Facebook Messenger, notifications, and several other enhancements.

Related resources

- Service Portal
- Service Portal configuration
- Mobile configuration and navigation
- Service Portal pages
• Knowledge base articles to improve SEO and reduce incidents
• Community: Harness the power of knowledge search
• User criteria for Service Portal
• Service Portal announcements
• Create personal notifications
• Success resources: Predictive Intelligence
Stage 3 – Make improving self-service an organizational priority

Self-service enablement is not a one-time activity, and it’s certainly not just about making the technology available. For sustained growth, tailor your organizational processes and incentives so they drive self-service success.

**KEY INSIGHTS**

- Clarify employees' roles and responsibilities in driving self-service success and align their performance incentives with self-service goals.
- Create knowledge management practices that let everyone easily solicit, share, modify, and consume knowledge.

Although self-service capabilities improve support desk efficiency and lower costs, support staff and service process owners may not invest in them. Many organizations still incentivize “firefighting” performance, using criteria that encourages support staff involvement, such as the volume of incidents closed, rather than case deflection.

Instead of firefighting, create an environment where support staff, service fulfillers, and process owners make self-service adoption a priority.

**Step 1: Build line-level incentives and KPIs around improving self-service**

It takes a village to create an effortless self-service experience—it’s not just the responsibility of the process owner or UX team. Often, service support staff don't understand how they can help or what they’re responsible for in driving self-service adoption. Instead of simply asking them to contribute, clarify their roles and responsibilities so they’re actively geared toward self-service awareness, adoption, maintenance, and enhancement. The RACI chart below shows how you can do this. In this chart, “A” stands for “accountable,” and “R” stands for “responsible.”
Support reps – Given that support reps are the first point of contact with service consumers, they play a critical role in building, maintaining, and driving awareness of self-service capabilities. Here are some examples of support rep activities that can help improve self-service:

- Proactively participate in highlighting service consumer pain points during design and use case prioritization discussions.
- Document and share knowledge with service consumers and support staff peers in an actionable, consumable format.
- Actively market self-service capabilities through email signatures that highlight the advantages of self-service or during conversations with service consumers.
- Provide in-the-moment coaching to service consumers on how to use self-service capabilities by doing a demo or walking them through your service portal.

Service process owner – Process owners are primarily responsible for driving self-service success for their service. They oversee the entire self-service lifecycle, like a product manager, and are required to have a good understanding of consumer needs. They can make sure the self-service experience is effortless and that service consumers frequently use self-service.

Service marketing – This could include staff in employee communications, IT communications, or external marketing depending on the service type. This group is primarily responsible for making consumers aware of the benefits and features of the self-service experience.

Self-service champions – Identify and engage self-service champions among your service consumers. The self-service champions are accountable for making consumers aware of the benefits of self-service (often by highlighting their own experience) and discovering consumers’
adoption pain points. The self-service champion community can be a solid source of insight into why consumers like or dislike self-service.

Even with roles and responsibilities clearly defined, service staff may fall back on old behaviors (for example, maximizing their individual support call volume) if they don’t have the incentive to focus on self-service improvement. To avoid this, tailor your service staff goals or management by objectives (MBOs) and performance metrics to align them with self-service success. The table below provides several examples.

<table>
<thead>
<tr>
<th>PERFORMANCE KPIs</th>
<th>MBOS OR GOALS</th>
<th>WHO IS IT APPLICABLE TO?</th>
</tr>
</thead>
</table>
| Case deflection rate | Ensure 80% of requests are self-served. | • Process owners  
• Service marketing  
• Self-service champions |
| Customer effort score | Maintain a customer effort score of less than 2 (see Measuring customer effort in Stage 2). | • Process owners |
| % of positive responses | Ensure relevant and comprehensive support across self-service channels (knowledge base, catalog, etc.). | • Process owners  
• Support reps  
• Self-service champions |
| % of outdated information | Remove outdated knowledge articles. | • Process owners  
• Support reps |
| Number of outages | Ensure 99.9% availability of the self-service solutions. | • Process owners |
| Self-service abandon rate | Minimize breakage in the self-service user journey. | • Process owners |
| % of repeated users | Maintain a high volume of repeat users. | • Process owners  
• Self-service champions |
| % of consumers who are aware of self-service | Promote self-service availability. | • Service marketing  
• Self-service champions  
• Support reps |
| % decrease in support calls per year | Reduce the number of support calls to increase service desk efficiency. | • Support reps  
• Process owners |

Table 6: Example MBOs and KPIs

ServiceNow recommends you create service platform dashboards to track details like the most common search terms on the portal. Doing this will help you make informed decisions to update catalog items, knowledge article descriptions, and meta fields based on how well users are able to find what they need. Other graphs, like view counts, can be useful for determining what content to feature most prominently across applications.
Step 2: Create a knowledge-centered service delivery focus

Knowledge is a key asset that enables self-service. Unfortunately, documenting knowledge is often treated as an overhead, administrative activity that gets in the way of service reps closing additional tickets or requests. Knowledge base articles may be heavy in technology jargon, incomplete, inaccurate, or they may have multiple versions. Solutions to known issues and requests often exist largely as tribal knowledge among support reps.

Instead, take a more disciplined approach to knowledge documentation and distribution.

First, build a knowledge management team. Give the team clearly defined roles and responsibilities to manage knowledge content creation, distribution, and maintenance.
<table>
<thead>
<tr>
<th>ROLE</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge author</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Knowledge reviewer</td>
<td>Review submissions</td>
</tr>
<tr>
<td></td>
<td>Review articles</td>
</tr>
<tr>
<td></td>
<td>Retire/cancel</td>
</tr>
<tr>
<td>Knowledge manager</td>
<td>Final review</td>
</tr>
<tr>
<td></td>
<td>Publish</td>
</tr>
<tr>
<td></td>
<td>Retire/cancel</td>
</tr>
<tr>
<td></td>
<td>Recover from retired or canceled</td>
</tr>
<tr>
<td>Knowledge admin</td>
<td>Delete articles</td>
</tr>
<tr>
<td></td>
<td>Train, troubleshoot, and support</td>
</tr>
<tr>
<td></td>
<td>Direct and track defects and requirements</td>
</tr>
<tr>
<td></td>
<td>Develop</td>
</tr>
<tr>
<td>Service desk agents</td>
<td>Consume knowledge</td>
</tr>
<tr>
<td></td>
<td>Submit knowledge from cases</td>
</tr>
<tr>
<td></td>
<td>Provide feedback on knowledge</td>
</tr>
<tr>
<td>Employee community</td>
<td>Consumer knowledge</td>
</tr>
<tr>
<td></td>
<td>Provide feedback on knowledge</td>
</tr>
</tbody>
</table>

Table 7: A ServiceNow customer’s definition of its knowledge team roles and responsibilities

Knowledge management doesn’t necessarily require a full-time team. Many ServiceNow customers have communities of practice for knowledge management with members who take on knowledge management maintenance responsibilities in addition to their regular tasks.

The Now Platform allows you to configure multiple different knowledge management roles to maintain knowledge content.

Second, templatize your organization’s knowledge to make it consumable. Using predefined templates for knowledge articles not only helps build consistency in the knowledge base—it also makes things simple for the service rep (the knowledge creator) and the reader who knows where to look for what, without having to read everything. The best templates focus on breaking the content into bite-sized messages for the reader.
Third, declutter the knowledge base. A knowledge base can get so bogged down with multiple versions of similar solutions that finding the right answer can feel like searching for a needle in a haystack. Use these best practices to declutter your knowledge base:

- **Define knowledge categories and topics** – Instead of having consumers search through the entire database, create categories and topics that enable efficient search and also help declutter the page.
- **Version articles cleanly** – Make good version management part of the knowledge management workflow.
- **Seek feedback on article quality** – Let your consumers tag articles as helpful or not helpful and flag them when they’re incorrect.
- **Proactively retire knowledge articles** – Use the feedback and SME advice to proactively retire knowledge articles when they’re no longer relevant.

Each section has a specific key takeaway/message for the reader.
The role of knowledge communities in increasing case deflection

We rely on our friends to help us resolve our day-to-day issues. Today, relying on others for help is even easier. When you have a question, you can access the knowledge, expertise, and experiences of not just those within but also those outside your social network.

Knowledge communities are online social platforms where users and experts can ask, respond to, and rate questions and provide access to crowdsourced knowledge through discussion forums. Research shows that communities can help to significantly enhance your customer service. Make enabling on-demand, crowd-sourced knowledge access through online user communities is a critical component of your self-service strategy. ServiceNow deflected 70% of support questions to the community in 2017, for example.

Related resources

- Dashboards
- Knowledge Management
- Knowledge Management roles
- Knowledge article templates
- Knowledge article category
- Article versioning
- Knowledge feedback
- Retire a knowledge article
Stage 4 – Build momentum for self-service adoption

"Build it and they will come" approaches to self-service don’t work. Instead, nudge service consumers to adopt self-service with the influence of early adopters and in-the-moment reminders.

KEY INSIGHTS

• Build momentum for self-service adoption with the help of pull marketing techniques: targeted branding, referrals, and peer-to-peer coaching.

• Highlight the immediate benefits consumers can get when they opt for self-service.

Despite the obvious benefits of self-service, people have a tendency to stick with their old behaviors, like directly calling the service desk for support. This is why a “build it and they will come” approach to rollout is guaranteed to fail. To keep your self-service investment from falling through the cracks, use pull marketing techniques like targeted branding, referrals, and peer-to-peer coaching.

Step 1: Give self-service a brand that highlights its benefits

Organizations typically promote self-service only as a new added feature. While this may help in building awareness of the solution, it doesn’t help consumers change their behavior. To truly get the ball rolling, brand your self-service as an effortless, anytime, anywhere solution to their service needs.

Effective branding messages communicate:

• **A simple, memorable message** – “Take control of your needs.”

• **Why customers should use it** – “Never wait in a line again!” “No more calls on hold.”

• **When customers can use it** – “Anytime, anywhere, on any device!”

• **How it aligns with organizational values** – “Excellence at work!”

Step 2: Highlight self-service benefits in the moment

Old habits die hard. Sometimes even when service consumers are aware of self-service benefits, their old ways, like calling for help, seem easier, even though they’re not.

Remind your consumers of their self-service options and the immediate advantages of using them—this will nudge them toward adoption. Try some of the in-the-moment nudges pictured here to drive self-service adoption.
You don’t always need to provide a great deal of data—all service consumers need is a little reminder that they should try self-service.

With the ServiceNow Service Portal, you can make your self-service widgets more attractive to consumers by configuring them using the widget context menu. This context menu can help you create nudges, like how long a consumer waits on hold versus how long it takes to self-serve.

Figure 17: Advanced configuration of ServiceNow’s Service Portal for highlighting self-service benefits in the moment
Step 3: Use early adopters’ influence to change old behaviors

As with any new product, self-service adoption follows a bell curve. There will be a few early adopters who don’t require a lot of convincing to use it—and some probably never will. Between these poles is a large middle-of-the-road population that needs just a little encouragement to make the shift.

Be sure you engage early adopters and use their influence to reinforce self-service benefits. Here are a few ways you can engage your early adopters and encourage your middle-of-the-road population to adopt quickly:

1. **Build knowledge-based communities** – Provide a platform for service consumers to connect with each other to share experiences, ask questions, and help each other. Make sure you include plenty of information and distribute it in a consumable format. When you use ServiceNow Customer Service Management, you can also use the community to help you create knowledge base articles to add to your self-service solution.

2. **Highlight early adopters as self-service champions or brand ambassadors** – It’s easier to trust that something is real once we’ve seen some evidence. When it comes to self-service, the evidence of its benefits comes from early adopters’ success, so market your early adopters as self-service champions. Share their success stories on posters and give them all-star status.
Task your self-service champions with helping other consumers who are struggling with adoption.

3. **Create a friendly competition** – Gamification is an effective marketing technique that quickly engages consumers with a product or service. Instead of using traditional push marketing, build inherent momentum with the help of friendly competitions, such as weekly quizzes on self-service functionality, cross-team self-service usage dashboards displayed publicly, and small giveaways for first-time users.

![Image of Harvest Knowledge option on Now Platform](image)

Figure 19: The Harvest Knowledge option on Now Platform (out-of-the-box)

**Related resources**
- Widget context menu
- Communities
- Champions
- Gamification
The takeaway

Increasing self-service is not a one-time investment—it's an ongoing initiative. To improve your self-service experience continuously focus on:

- **Making the self-service user experience “effortless” —** Focus on a small number of key interactions in the user journey where users form their service experience perception. Use advanced search, personalization, and intuitive design to provide an effortless experience at those key user interactions.

- **Prioritizing self-service improvement and maintenance —** Define measurable goals for self-service improvement and align them with your strategic goals for the Now Platform. Clarify roles and responsibilities to make self-service improvement a priority for your entire service staff.

- **Nudging users to adopt the self-service option —** Help users overcome change inertia through targeted branding, in-the-moment benefit reminders, gamification techniques, and the social influence of early adopters—your service champions.

Next Steps to improve self-service with ServiceNow

**Stage 1**

- Evaluate your self-service health against measurable outcome metrics.
- Understand the pain points and expectations of your consumers at key service interaction points.
- Objectively evaluate self-service use cases for your ROI and use automation to reduce workflow complexity.

**Stage 2**

- Design an intuitive, easy-to-navigate self-service user interface:
  - Unify access to all self-service applications through a common service portal.
  - Provide a human-centered experience.
  - Design for a mobile-first experience.
- Enable advanced search functionality.
- Use in-context personalization to solve for relevant needs.

**Stage 3**

- Clarify the roles and responsibilities of service staff in driving self-service success.
• Align service staff incentives and performance KPIs with self-service success.
• Build a good knowledge management discipline.

Stage 4
• Create self-service branding that highlights its benefits.
• Build in functionality to nudge service consumers to choose self-service in the moment.
• Engage and highlight early adopters’ success to influence others to adopt self-service.