

5 Essential Steps to Modernize Your Service Desk

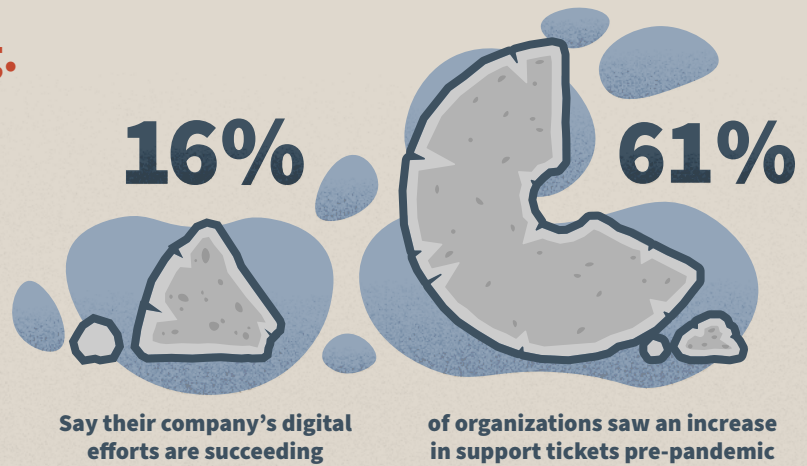
Take Your Support Agents from Stone Age to Space Age



The service desk is evolving.

Don't get stuck in the stone age.

According to a recent survey, **digital transformation is the number one focus for businesses in 2021.**¹ But, despite digital transformation being at the forefront for companies across a variety of industries, research reveals that just **16 percent of executives say their company's current digital transformation efforts are succeeding.**²



Research also shows that the trends prior to Covid-19 were amplified during the pandemic, meaning that companies who already embraced digital change experienced an even greater digital boom, and those who struggled with digital adoption faced increased challenges.³

To make matters more complicated, according to HDI research, **61% of organizations were already seeing an increase in the volume of support cases in pre-pandemic,** which was trending up year-over-year.⁴ This means that in the wake of the pandemic, there are more support desk tickets now than ever, all while digital transformation is underway.

So how can you propel your company to success in a digital transformation while supporting agents who are handling a surplus of support tickets?

It all starts by modernizing your service desk.

Businesses who keep up with the evolution of technology and continually modernize their service desks can see huge returns, including faster ticket handling, a successful shift-left initiative, and happier service desk agents.

This guide will walk you through the five essential steps to modernize your service desk so that your team can continually evolve, grow, and thrive.

Step 1: Map the Customer Journey to Create a Knowledge Management Strategy

Step 2: Embrace Automation

Step 3: Implement AI Technology

Step 4: Introduce Multiexperience and Invest in the Interface

Step 5: Create a People-Focused Initiative

1 ITSM.tools, The Five Hottest ITSM Trends and Topics for 2021, Sophie Danby, 28 January 2021

2 McKinsey Research, Welcome to the Digital Factory: The Answer to How to Scale Your Digital Transformation, Somesh Khanna, Nadiya Konstantynova, Eric Lamarre, Vik Sohoni, 24 May 2020

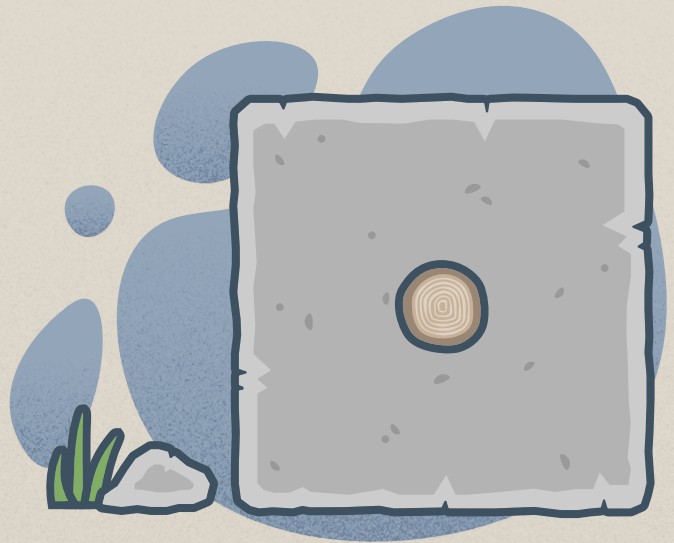
3 McKinsey Research, Organizing for the Future: Nine Keys to Becoming a Future-Ready Company, Aaron De Smet, Chris Gagnon, 11 January 2021

4 HDI, EasyVista, [The ROI of Shift-Left: Optimizing Service Desk Costs with Self Help](#)

Step 1: Map the Customer Journey to Create a Knowledge Management Strategy

The first and most crucial step is something that doesn't seem quite so modern: knowing your customer and creating a strategy to support them using knowledge management. **This step does not have to reinvent the wheel** – instead it should harness the power of what you already know.

Mapping the customer journey and using knowledge to guide that journey is not a new concept or technology, but it is the foundation for the rest of the service desk's success. Before you can go through any of the technology focused steps, you first must harness human intelligence and input to understand the customers, their needs, and the knowledge necessary to meet those needs.



To start, involve a variety of stakeholders, including managers, service desk agents, customers, and other interested parties. Then create a list of your possible customer personas. These are fictional people who represent customers of the service desk. For example, one persona might be a customer support representative who frequently runs into errors and needs to resolve issues quickly while their customers wait. Another persona might be a manager who wants to see their teams' results on a weekly basis, and that person might frequently need assistance with an analytics software.

After creating your personas, map the customer's journey. Think about touch points, pain points, and what types of knowledge they will need access to. This simple step can help you avoid redundancy later on, ensuring the right articles and knowledge are being used for the foundation of your modern service desk.

Once you have established who your service desk is serving, you can home in on the knowledge needed to meet their goals. Then, use the following building blocks to strategically assemble your knowledge management strategy:

Building Block 1: Take inventory of existing knowledge articles

Building Block 2: Decide which articles should be used first

Building Block 3: Using an intuitive knowledge database, be sure that all knowledge articles are **crawable and indexable**

Building Block 4: Refine knowledge articles on the fly

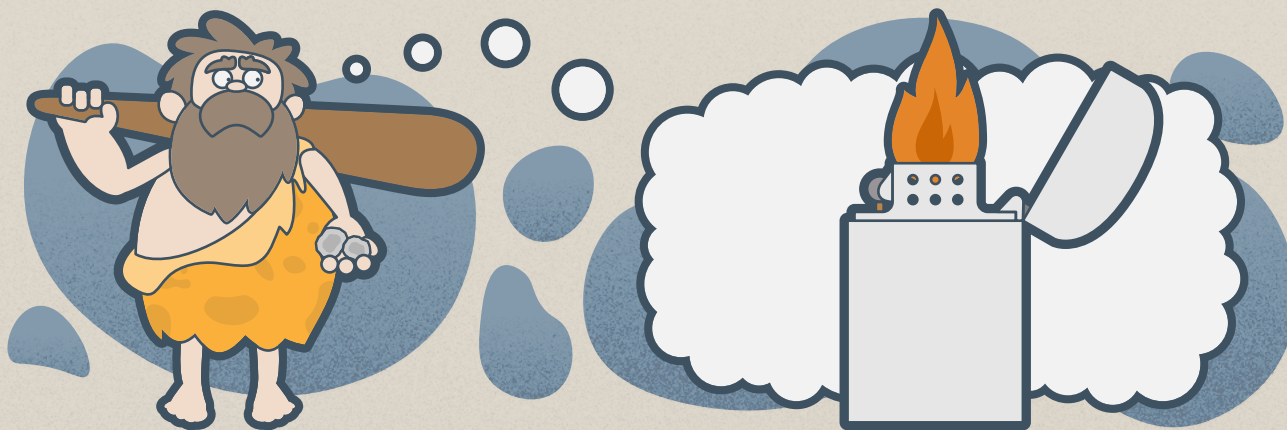
Building Block 5: Create a knowledge review board to periodically update, accept changes, and modify the knowledge database

You can learn more **in-depth knowledge management tips here**, but for now it is important to understand that knowledge is the foundation for creating and sustaining a modern service desk.

Step 2: Embrace Automation

Gartner predicts that **“through 2023, more than 80% of desktop virtualization projects deployed primarily to save cost, rather than to improve security or business continuity, will fail to meet their objectives.”**¹

How can you make sure that your service desk modernization and strategy falls into the 20% of successful initiatives, thereby propelling you into the new era? By introducing AITSM, automated knowledge sharing, and automated workflows.



Automation – specifically automation of shared knowledge, processes, and workflows – directly feeds into improved business continuity. Additionally, automating workflows can reduce onboarding time while increasing productivity, as more redundant and cumbersome tasks (like user creation) are moved to the proper channel (like self-service).

To introduce automation:

- 1 **Map out the tasks you already do that have some degree of automation to them.** This might be as simple as mapping out workflows that already exist.
- 2 **Identify areas with the greatest probability of automation success.** Although your hope may be to enact an aggressive automation strategy, start with automating ITSM processes, like **change and asset management**. Then, once the obvious areas are automated, expand from there.
- 3 **Create a database that indexes and crawls articles, videos, and other assets** so that when a step in a specific workflow is triggered a knowledge article is automatically shared.

For example, imagine a service desk employee has a customer who needs help with their phone. Using information already input by the customer, an automated workflow will trigger knowledge articles related to their specific phone to help complete the task. This will save the agent time searching for the right information and lead to faster resolution time. has a customer who needs help with their phone. Using information already input by the customer, an automated workflow will trigger knowledge articles related to their specific phone to help complete the task. This will save the agent time searching for the right information and lead to faster resolution time.

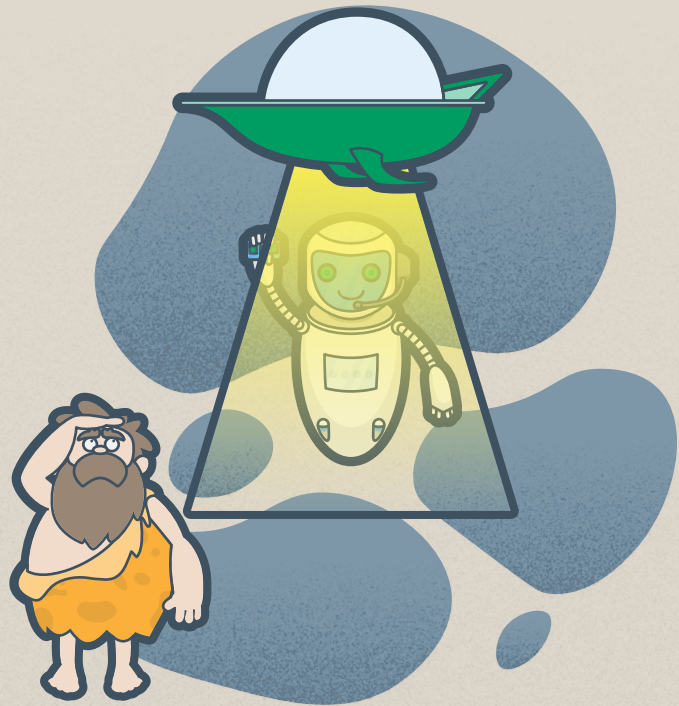
It is easy to feel threatened when automation is introduced. But remember: all automation efforts in this essential step should keep the human agents and customers in mind. Automation for automation’s sake is nothing – automation with a human-focused center is where success lies.

¹ Gartner, Predicts 2021: Digital Workplace Infrastructure and Operations, Stuart Downes, Dan Wilson, Nathan Hill, Michael Silver, Chris Silva, 7 December 2020





Step 3: Implement AI Technology and a Virtual Agent

AI technology takes automation and knowledge management to the next level, making knowledge and information easier to access than ever while creating a way to create and escalate support tickets quickly.

The goal of AI technology is not to replace employees or service desk staff. Rather, it should enhance and augment their experience. AI technology may take the form of a **virtual agent or chatbot** embedded into a website or self-service portal, or it may be accessed through another channel, like Microsoft Teams, Slack, or Skype.



An effective virtual agent should include:

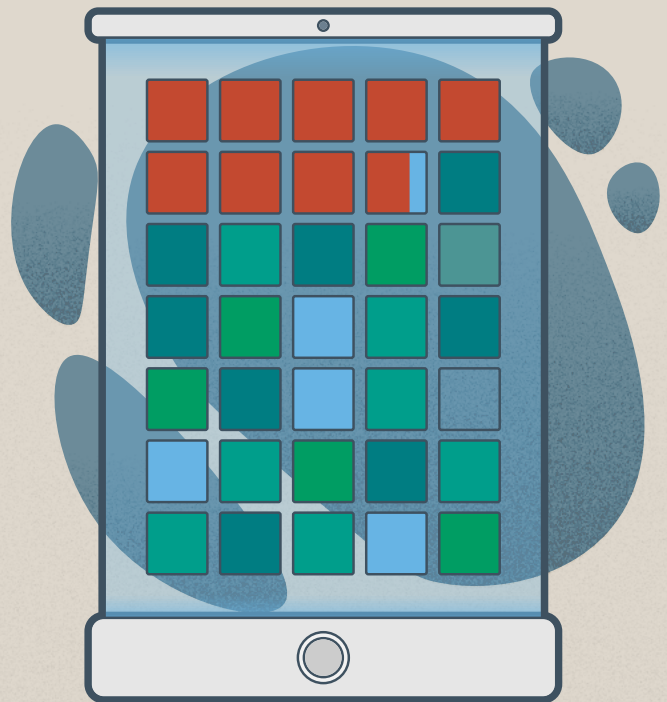
-  **Automatic language translations** which ensure employees can access knowledge in the language most natural and comfortable for them.
-  **Natural Language Processing (NLP) technology**, which facilitates contextualization. NLP is a subfield of computer science and artificial intelligence focusing on language interactions between humans and computers. NLP helps AI interfaces better understand human language so they can converse with humans more effectively and accurately.
-  **Machine learning with Robotic Process Automation (RPA)** which allows technology to learn and improve through experience. Combined with NLP and contextualization, machine learning with RPA ensures that the right answers are delivered every time, to every agent and customer.
-  **Support ticket creation ability** that sends a detailed report of the conversation and information accessed to the service desk. This enables the user to quickly escalate and create a support ticket without having to remember or regurgitate the steps they tried through the chatbot, while giving the support desk a more comprehensive view of what was already ineffective.

At its core, this step should ensure that your modernized service desk is offering a wide range of ways for customers to get what they need, while still freeing up human agents to handle higher-level issues.

Step 4: Introduce and Invest in a Multiexperience Interface

Disjointed interfaces and clashing tools will keep your service desk in the paleolithic era. Both service desk employees and customers are expecting the same seamless experience they get in their personal lives. Yet, a recent digital workplace survey indicated that 22% of respondents were dissatisfied with the applications that the workplace provides.

Consider a multiexperience approach to self-service and ITSM apps to create a smoother experience for increased satisfaction.



Defined by Gartner, **“Multiexperience refers to the various permutations of modalities (e.g., touch, voice and gesture), devices and apps that users interact with on their digital journey across the various touchpoints.”**¹

Multiexperience is important to understand because investing in the interface of your apps, even in the context of ITSM and self-service technology, is the growing trend of modern service desks. In fact, Gartner states that **“by 2023, more than 25% of the mobile apps, progressive web apps and conversational apps at large enterprises will be built and/or run through a multiexperience development platform”**.²

This may sound similar to **omnichannel** or **multi-channel**, however, put simply, those terms refer to where your knowledge sources meet your intended users. For example, omnichannel refers to a support channel which seamlessly meets customers wherever they prefer at every level of interaction within your organization, like giving the ability to access information via Microsoft Teams, Slack, or a web portal without regard to specific devices.

Multiexperience is simply the next step in the evolution of omnichannel because the focus is on tailoring the interface to each different device, rather than simply transferring or translating between devices.

For an example of multiexperience, think of an ITSM self-service portal that can be accessed on a laptop. That portal will need to be tailored and changed for someone accessing from a tablet or cellphone – and tailored even further still for someone trying to access from a wearable tech like a smart watch. No matter what device they are accessing the portal through, the experience should be seamless.

At the core of this step is the consideration of the needs of the end-user. What do the customers of your service desk need the most, and where are their touchpoints? How do they contact the service desk currently? Think back on the foundations of step 1, knowing your customer. Take those touchpoints and tailor them, creating a seamless user experience.

By minding the interface and access points where the service desk will provide service, you can continue to create the user experience that customers and employees expect.

¹ Gartner Digital Workplace 2020 Research Circle Survey, June 2020





² Gartner, Critical Capabilities for Multiexperience Development Platforms, Jason Wong, Van Baker, Mark Driver, Adrian Leow, Paul Vincent, 12 August 2019

Step 5: Create a People-Focused Initiative

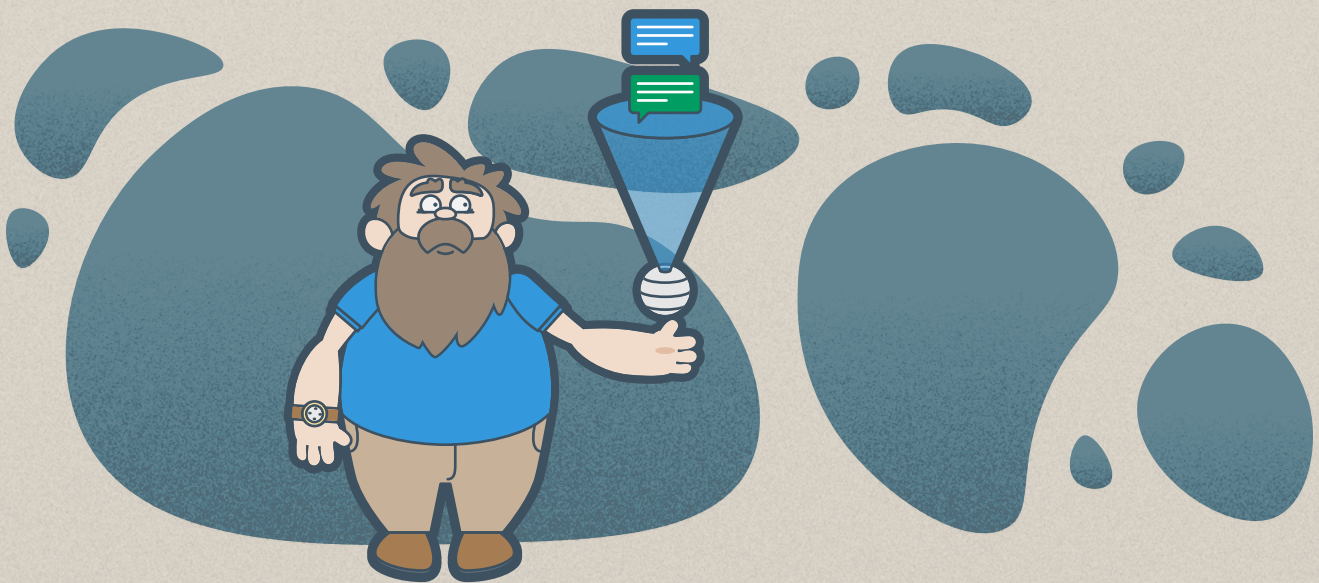
The customer is often the focus of new initiatives, but it is critical to focus on service desk employees in order to reduce employee turnover and increase satisfaction, not to mention increase adoption of these new technologies. The greatest investment in technology will fail if the service desk team does not feel empowered or enabled by it, and adoption will not increase without an investment in the people themselves.

In fact, psychological research shows that the most important factor for employee experience is being able to make progress every day toward the work that they believe is most important.¹ When you give your team the tools they need to free up their time to focus on projects they care about, it can increase their overall satisfaction.

Giving your team the ability to make progress toward what they feel is important means not only creating a people-focused initiative to push the use of new tools like automation and AI, but also making an investment in the service desk team as a whole. Ask yourself:

-  How does each tool impact the service desk team's workday?
-  Does the technology augment and compliment the service desk employee's experience?
-  Have team members been invited to contribute ideas for new tools and technology?
-  Can our team benefit from expanded growth and education opportunities?

By considering these questions and allowing your service desk team to learn new skills, take on new projects, and expand their areas of expertise, you will create a more positive and productive environment for years to come. Keeping human agents at the center of your plans has benefits beyond simple technology adoption. You will be able to ensure that your team is engaged and committed to achieving your evolving goals.



¹ Forrester, The Employee Experience Index, David Johnson, 27 Feb 2019

Ready to bring your service desk into the new era and go beyond the “next normal”?

See how EasyVista can help modernize your service desk.

Creating a modernized service desk will benefit the IT team, customers, and the organization as a whole no matter what the future brings. Throughout each step, it is crucial to keep the human agents and customers as the guiding light.

Want to modernize your service desk and lower level-1 tickets by 30% while creating meaningful customer and employee experiences?

Learn how to deliver interactive knowledge experiences, provide access to answers from anywhere, and incorporate intelligent automation and Service Bots with EasyVista.

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