

The ROI of Shift-Left: Optimizing Service Desk Costs with Self-Help

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Introduction

Technology is no longer an “add-on” to the way we work; it is the way we work. Digital transformation is bringing new systems and applications to the workplace, driving increasing demand on support year over year.

Today’s employees and customers want to be able to easily find answers to their questions and resolutions for issues they may be experiencing with the technologies they use every day. At the same time, executives want to decrease the costs of supporting employees and customers while increasing satisfaction. A shift-left strategy can address both of these needs, as it shifts resolution to common issues from Level 1 support to self-help systems and reduces escalations by providing access to knowledge for issue resolutions that reduces the volume of escalations to Level 2.

In order to make shift-left effective, self-help solutions for users must be very efficient and available, allowing any type of user to quickly find and resolve issues on their own. New types of self-help that include AI, virtual agents, and next-generation knowledge management technologies can help organizations reach these goals but do require investment.

***The question, then, is:
What is the ROI of shift-left
and self-help?***

THIS REPORT EXPLORES:

- ✓ **Increased demand for services vs. spending and resource constraints**
- ✓ **The demand for self-help and why organizations struggle**
- ✓ **Cost benefits of shift-left**
- ✓ **The real costs of not providing self-help**
- ✓ **Changes to metrics that indicate shift-left success**
- ✓ **Integrating the right technology**

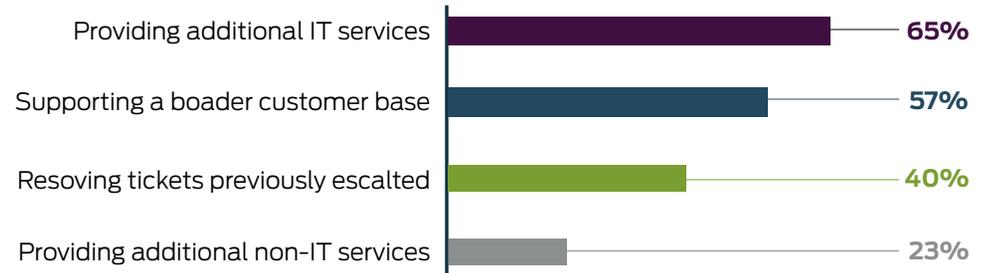
Increased Demand for Services vs. Spending and Resource Constraints

According to [HDI research](#), 61% of organizations saw an increase in the volume of support cases (“tickets”) in 2018. This follows a trend from each of the past nine years, where a majority of organizations have seen an increase year-over-year. The reasons for the increases are many, but the number one reason is that the workforce is growing, so internal support organizations have more customers/users, and organizations whose business is support (outsourced support) are also growing. There’s simply more to be done.

In addition to these reasons, which are fairly consistent from year to year, additional HDI research uncovered some of the changes currently taking place in support organizations as services and service management take hold across the enterprise.

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Factors Contributing to Increased Ticket Volumes

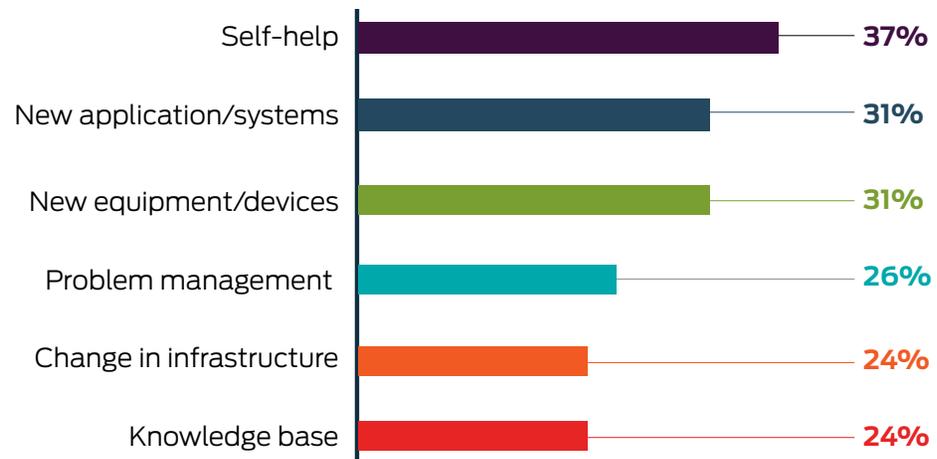


It is clear that support organizations are doing more things for more people—and not only more customers, but a broader range of customers from across the enterprise. But, while [89% of companies expect their IT budgets to grow](#), most of that increase will be spent upgrading outdated IT infrastructure. Only about 27% of organizations are creating and filling new support staff positions according to 2019 HDI data.

Almost every support manager knows that their budget and resources will be constrained, and the support organization has become very adept at finding ways to be more efficient, lower costs, and generally “do more with less.” One of the ways to lessen the burden on support, create more efficiencies, and provide broader service is to provide useful self-help for customers, and many organizations have gone and are going this route. But there are some hurdles, which we explore in the next section.

One of the ways to lessen the burden on support, create more efficiencies, and provide broader service is to provide useful self-help for customers.

Factors Contributing to Decreased Ticket Volumes



The Demand for Self-Help and Why Organizations Struggle

From the perspective of a high-demand, low-budget support organization, it's easy to see why self-help—especially in the form of user-facing knowledge—is a go-to strategy. In fact, it's considered a must-have technology in just about half (49%) of organizations. Having customers and employees resolve their own issues can lower contact volume and reduce the workload in the service desk. Many organizations have taken a Field of Dreams approach to their user self-service strategy based on portals and knowledge articles: If we build it, they will come. Except that they don't come.

The number-one reason [cited by organizations](#) (29%) for their knowledge management programs not meeting their expectations is, "We can't get users to adopt it." Knowledge tends to be hard to find, difficult to understand, and does not provide context or interactions with the user.

But this grows even more perplexing when we look at the reasons why companies and institutions decide to invest in self-help in the first place. Ahead of cost savings and volume-lowering as reasons to build self-help is this: 33% of organizations are responding to demand from users to be able to resolve their own issues.

A self-help solution is about a new way of capturing knowledge from subject matter experts and leveraging intelligent automation to improve syndication to users where they work.

If users want self-service, why don't they use it? The answer is clear, if not pleasant: The execution of self-service in many if not most organizations simply is not very good. One of the most common ways organizations believe they are providing self-service is through Frequently Asked Questions (FAQs).

62% of organizations post FAQs as part or all of their self-service, but 83% of those organizations say that their FAQs are written by support staff. That means they aren't "frequently asked" at all; they are answers to questions the support staff believes users will ask. When customers and employees search through the FAQs, they quickly realize that their questions have not been addressed. Only 35% of the organizations that use FAQs provide actual questions from users.

Additional reasons why self-service is so often not adopted by the people it is supposed to assist include:

- ✓ They don't know about it
- ✓ They can't find what they are looking for
- ✓ Search is poor
- ✓ The verbiage is all "IT-speak" rather than user language
- ✓ The portal technology is "clunky"
- ✓ There are cultural barriers
- ✓ Customers are used to "white glove" service
- ✓ Support analysts don't like sharing knowledge
- ✓ Leaders do not provide the necessary time, resources, and training

The solutions to the adoption issue are rather clear. Organizations have to create a culture of knowledge sharing, understand the customer point of view, and invest in technologies that make it easy to find and use real answers, which is more of a modern self-help solution. These solutions are more than just a self-service portal and knowledge article. A self-help solution is about a new way of capturing knowledge from subject matter experts and leveraging intelligent automation to improve syndication to users where they work.

Cost Benefits of Shift-Left

What Exactly Is Shift-Left?

For our purposes here, shift-left means moving work from higher levels of support toward Level 1 (the front line) and moving repetitive work out of Level 1 into self-help. Some of the cost benefits are fairly easy to see: While the average cost per ticket at Level 1 is about \$16, the cost for a no-contact self-help resolution is generally reported at around \$2.

But there's more benefit than just an average of \$16 per ticket. The [average handle time for a Level 1](#) service desk contact is 8-10 minutes, so even 10 self-help cases—people who don't contact the service desk—reduces the workload by between 80 and 100 minutes.

If your organization can provide self-help that is highly adopted by customers/users, you stand to save money and time, and reduce the pressure to hire additional staff.

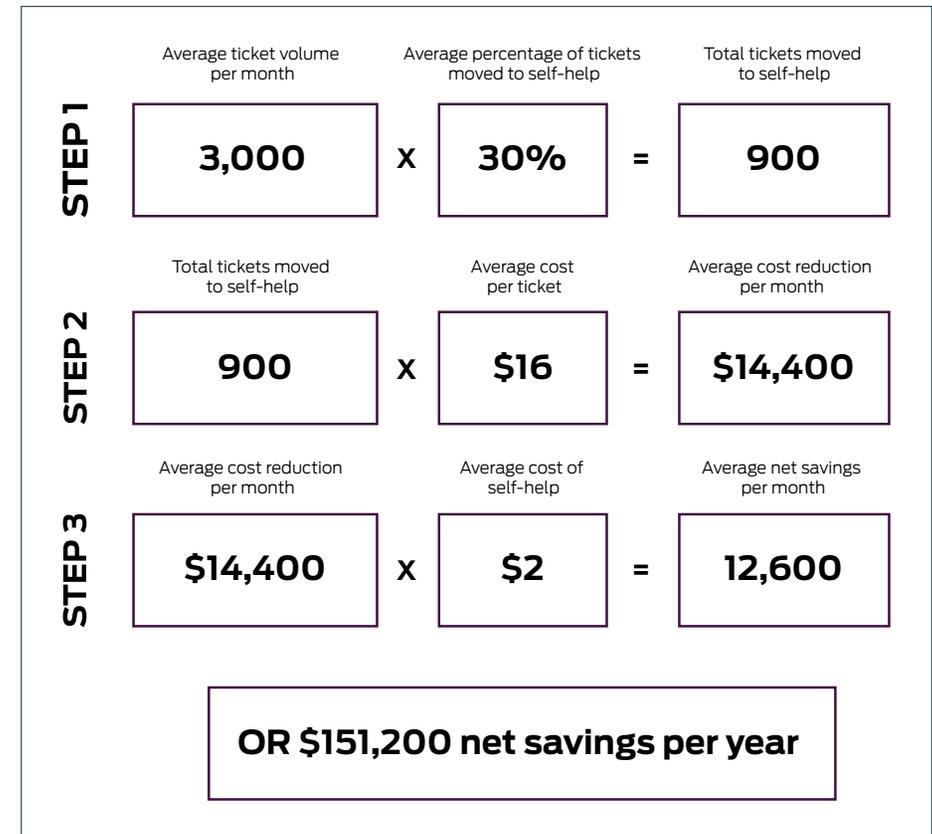
[Click here to calculate your savings](#)

ROI CALCULATION

Let's consider a service desk that has an average volume of 3,000 tickets per month.

Assumptions

- ✓ Average cost for Level 1 ticket = \$16
- ✓ Average cost for self-help resolution = \$2
- ✓ Average service desk contact time = 8-10 mins
- ✓ Average percentage of tickets moved to self-help = 30%



Since we are considering cost benefits and not ROI alone, we should also include the work-time savings. The 900 tickets now being resolved through self-help represent between 120 and 150 analyst hours per month, increasing time that can be devoted to better knowledge management, increased communication, and better customer experience.

The True Benefits of a Self-Help System

The primary goal of any self-help solution must be to make it easier and more efficient for the people who use it. The primary goals for self-service should not be:

- ✓ To deflect contacts and save money
- ✓ To reduce labor costs and save money

While these are all-too-often cited as goals, they should instead be viewed as the outcomes of successful self-service. If users find the answers to their questions quickly and easily, contacts to the service desk will be reduced. The design and content of the self-service portal, then, must be aligned with the goals of user experience and user success. In order to reach these goals, there must be an investment of time and money. Cost saving will come, but it will come later.

If your organization can provide self-help that is highly adopted by customers/users, you stand to save money and time, and reduce the pressure to hire additional staff. That is ROI that comes directly. But there's more information that's hidden, as we'll see in the following section.

The Real Costs of Not Providing Self-Help

The Challenges of a Digital-First Culture

The service desk grew up in an era when no one was using computers outside of work, because the personal computer didn't exist yet and mobile devices were props in science fiction movies. Many of today's users grew up unacquainted with a world without an internet and mobile access to it and to each other.

The entire model of the service desk was constructed in a world where customers were supplicants, more or less at the mercy of the people who understood and had control of the technology. Now we live in an era of empowered customers who use high-powered tech in their daily lives, and who search YouTube for assistance. To these digital natives, it seems absurd to pick up a phone and call for assistance only to wait in a call queue and hope their issue can be quickly resolved. In addition, they are used to extreme ease-of-use provided by the likes of Amazon, Google, Apple, and others, and whether we like it or not, they measure every experience with support against those giants.

Can our organization afford not to provide self-help?

The Loss of Business Productivity

Beyond the cultural and generational causes, there is also the untold story of lost business productivity. Every minute waiting on the phone or for an email or instant messaging response is a minute of lost work. If we take that relatively small service desk that handles 3,000 tickets per month, for example, 8-10 minutes per contact represents 24,000 to 30,000 minutes—that's 400 to 500 hours—of work that is not getting done, and that does not count the wait for a response much less a resolution. So, there are two sides to the cost story: The direct costs of providing support, and the lost productivity seeking it.

We can add to this mix of considerations that today's workforce is extremely mobile, working where and when they can, and that means often when the service desk is not staffed. In 2018, 44% of support organizations reported that they [do not handle tickets after business hours](#).

Changes to Metrics That Indicate Shift-Left Success

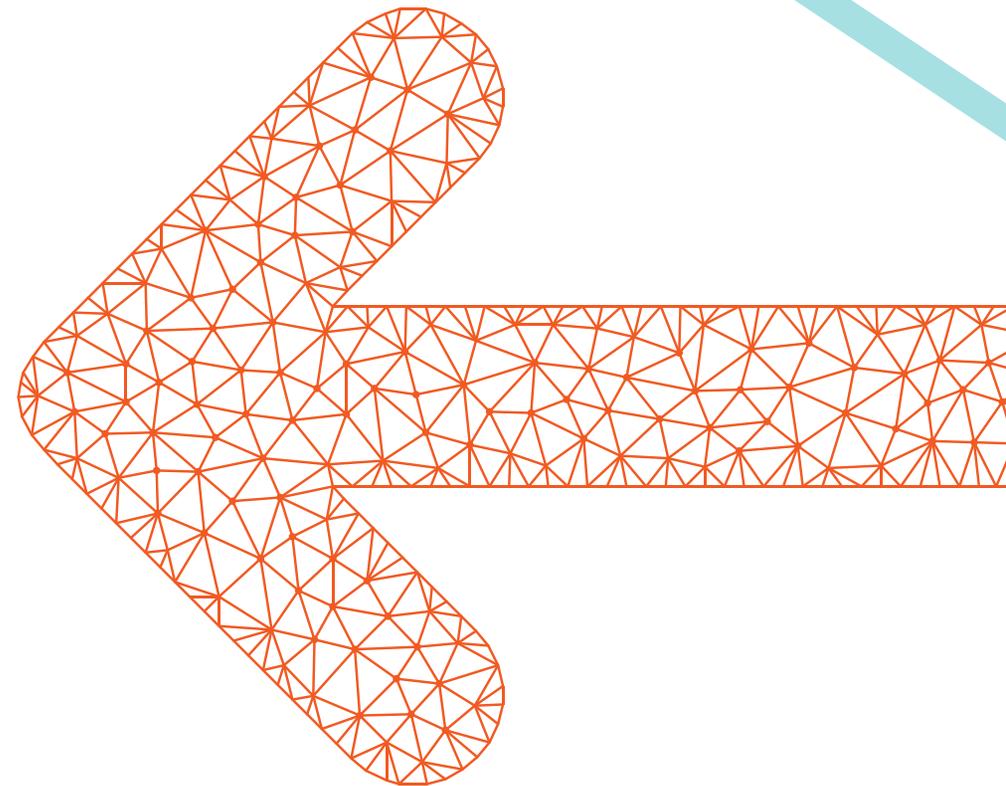
Of course, there are metrics that directly measure the effects of shifting left, for example:

- ✓ Contact volume reduction
- ✓ Knowledge article use and reuse
- ✓ Number of customers searching self-help
- ✓ Reduction in the number of escalations (due to shift-left)

But metrics are not independent of each other; they weave together like a fabric. When one thing changes, it produces effects in other places, like a pulled thread.

When self-help becomes successful, the routine “one-and-done” contacts to support are reduced, so the average complexity of support cases reaching Level 1 goes up. Therefore:

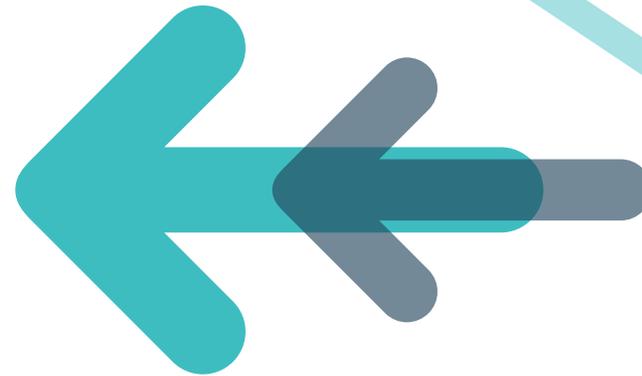
- ✓ First contact resolution (FCR) goes down
- ✓ Average handle time (AHT) goes up
- ✓ Average number of tickets per analyst goes down



Since those three metrics have long been measures of success and productivity for the support organization, managers are often at a loss to explain what's happening. Managers should shift their focus from the traditional, call center model metrics to measures emphasizing the productivity and satisfaction increases provided to the user base, and from transactional measures to ones that more accurately reflect the customer experience overall.

Because traditional customer satisfaction (CSAT) or [Net Promoter Score](#) (NPS) surveys are generally sent out to customers or users who contact support, the number of surveys completed will drop if more people are using self-help. These surveys will represent a smaller and smaller sample of the user base if self-help remains successful over time. Therefore, it makes sense to conduct much broader measurements of customer experience, such as the [Customer Effort Score](#) (CES), which is an indicator of how easy or difficult it is to resolve issues, in this case those related to IT or software. Surveys for CES can be sent out to the user base at large and should ask two questions:

- ✓ Have you had any questions or issues related to our business technology?
- ✓ How difficult (or easy, depending on how you want the scale to read) was it to resolve your question or issue?



As with any survey, there should also be a field for text comments. These comments are often very enlightening and can stimulate positive change. Organizations can also consider [customer journey mapping](#) to better understand the hidden barriers to resolution and minimize or eliminate them.

In any case, support organizations need to come to the realization that they cannot continue to do business as they have in the past, and the measures they have used are far less useful and perhaps no longer valid.

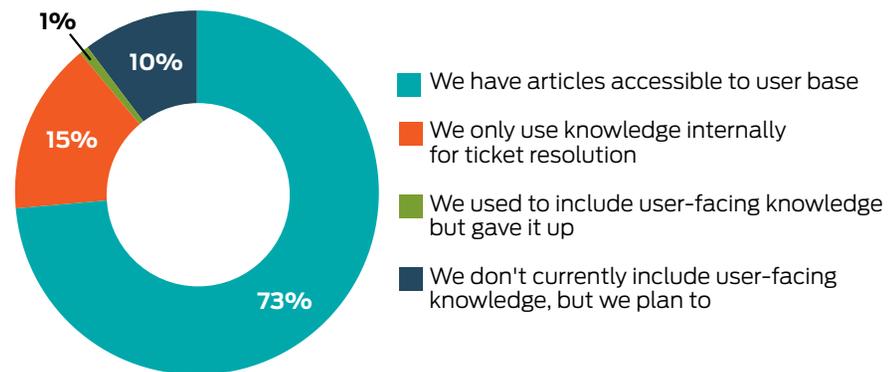
Integrating the Right Technology

[HDI research](#) tells us that about one-third (31%) of organizations consider self-help to be a must-have technology, and that 58% put knowledge management in this category overall. 73% of organizations that responded to one [HDI survey](#) have knowledge accessible to users. But further HDI research also tells us that 43% of organizations want to invest in knowledge management, but do not yet have a plan or budget, and 26% have no plans to invest at the current time. Having the technology is good, but having the right technology can accelerate and boost success.

We have seen that simply creating a self-service portal (in the Field of Dreams fashion) does not produce the desired results. There remains the work of getting customers and employees to get in the habit of using it, which means they have to go there and successfully find what they are looking for more than once.

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User-Facing Knowledge in Knowledge Management Programs



What if the customers/users did not have to go to a destination to find help, but rather help was available to them where they are working and when they need it?

New technologies that include machine learning can help provide omnichannel support by bringing relevant self-help to users, rather than have them going to a destination. These technologies include contextual awareness, i.e., relevance based on exactly what the user is doing in an application, on a web site, with a document, and so on. Assistance follows the user through the work, providing answers as needed. These modern systems may also include virtual assistants or chatbots, integration with collaboration platforms, and the ability for knowledge to interact with other enterprise systems, such as Microsoft Teams, to provide context and the ability to complete tasks.

We previously saw some of the productivity and cost results of successful self-help; these technologies add the benefit of being able to work virtually uninterrupted, reducing the time to find an answer. Instead of stopping work, getting to a portal, and searching one or more times for relevant information, the user can be presented with help within seconds without leaving what they are doing.

HDI research conducted in 2019 found that support staff and management were vocal about their current knowledge management tools. In hundreds of text comments, survey takers told HDI that they needed technology that

- ✓ Has better search capability
- ✓ Has a good user interface
- ✓ Is less “clunky”

The word “clunky” appeared in the text comments on the survey over and over again, indicating that it is difficult for both analysts and customers to use, damaging the user experience and the employee experience as well. (This is precisely the type of information the Customer Effort Score can help elicit.)

Conclusion

Service desks and support organizations have worked very hard at being efficient while remaining effective, and have in large part succeeded, handling increased volume and more varied tasks year after year. But now we have digital native workers who are not used to interrupting their work to seek outside help, and businesses that are focused on velocity as a competitive advantage. Things happen fast, and stoppages are contrary to good business practice and outcomes.

The time has come for support organizations to reassess their mission and focus on contributing maximum value to the business. Executing a shift-left strategy based on self-help can:

- ✓ Deliver significant ROI to organizations
- ✓ Fulfill users' desire to resolve their own issues
- ✓ Create a better employee experience as well as customer experience
- ✓ Minimize lost productivity
- ✓ Reduce contact volume and attendant costs
- ✓ Reduce the demand to increase support staff size
- ✓ Reduce Tier 1 tickets by 30%

All of these should be taken into account as benefits of investment in good self-help practices enabled by good self-help technologies.



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SHIFT-LEFT ROI CALCULATION WORKSHEET

This worksheet walks you through the calculation of what savings your organization can potentially see with a successful shift-left strategy. **Enter your average ticket volume and press return to calculate your savings.**

Assumptions based on HDI research*

- ✓ Average cost for a level 1 ticket = \$16
- ✓ Average service desk contact time = 8-10 mins
- ✓ Average cost for self-help resolution = \$2
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STEP 1

Average ticket volume per month

Average percentage of tickets moved to self-help

Total tickets moved to self-help

X =

STEP 2

Total tickets moved to self-help

Average cost per ticket

Average cost reduction per month

X =

STEP 3

Average cost reduction per month

Average cost of self-help

Average net savings per month

X =

STEP 4

Average net savings per month

Net savings per year

X =

GET A PERSONALIZED ROI