HDIResearchBrief.

Technology for Empowering End Users

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Through various types of technology solutions, support organizations are empowering end users to resolve or submit their own issues and requests online. By offering these types of support options for a more self-sufficient workforce, organizations are embracing customers' various work styles and preferences. As a result, customers feel respected and supported, which ultimately leads to a better overall experience with the support organization. While some organizations implement self-service portals as a means of cost reduction, if implemented well, customers experience expanded service options and more opportunities to access solutions and support teams on their own.

With our latest survey, we set out to learn more about the types of tools provided to end users, as well as the processes, benefits, and even pain points that go along with offering and supporting these technologies. Via an online survey distributed in May and June 2015, HDI collected data from 349 technical support professionals on the subject of technologies used to empower end users. This report reveals the results for two types of technologies provided to empower end users: self-service options available to end users to resolve their issues without assistance from the support team, and online forms as a channel for submitting their own issues to the support team as needed. Highlights include:

- Only about one out of four respondents rate their current online form as "very successful," with the biggest hurdle being end-user adoption.
- SLAs and ticket handling practices vary widely for issues submitted by end users through online forms.
- Access to ticket status or history is the most common self-service (unassisted) solution provided, followed closely by password-reset solutions and knowledge base/FAQs.
- End-user awareness, access, and adoption are the biggest hurdles for unassisted (tier 0) support tools.
- Most tools available for empowering end users are accessible through self-service portals or company (or IT) websites; in addition, 15–20 percent of respondents provide access to the tools through mobile apps.

Research Findings

Unassisted (Tier 0) Support Tools

Self-checkout at the big-box stores, self-check-in at the airport ticket counter, and even self-serve soft-serve ice cream at your favorite restaurant are all examples of unassisted self-service, and are the equivalent of technical support's tier 0. No staff members are engaged to help customers with their needs; instead, customers help themselves. While in many situations the skills and knowledge of technical support analysts are needed to assist end users, some customer issues can be resolved without occupying an analyst's time. A variety of tools are available that allow end users to help themselves. Figure 1 shares the percentage of technical support organizations currently providing end users with access to each type of tool.
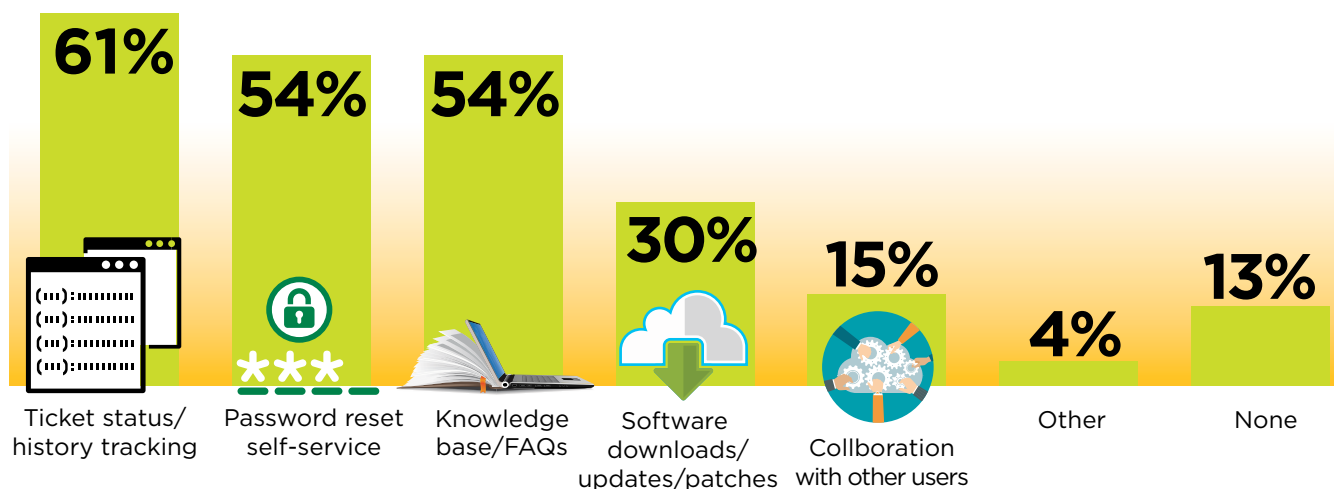

"After seeing the success of the operation, Corporate is very supportive and users are adapting rapidly."

— Survey Respondent

When customers contact the support center to inquire about the progress of a previously submitted request or to review the history of prior tickets, this takes time away from the support team that could be used to respond to more complex questions. Sixty-one percent of support organizations attempt to reduce these types of calls by permitting online access to ticket status or history.

Password reset self-service and knowledge base access are the next most common tools provided. For years, support centers have felt the impact of the rapid increase in the number of applications requiring access, along with related security concerns and password requirements. In 2012, about 30 percent of total tickets logged by the average support center were related to password resets.

Figure 1: Types of Tools Provided for End Users to Resolve Issues or Requests on Their Own (i.e., Tier 0/Unassisted)

Tool	Percentage
Ticket status/history tracking	61%
Password reset self-service	54%
Knowledge base/FAQs	54%
Software downloads/updates/patches	30%
Collboration with other users	15%
Other	4%
None	13%

Percentage of organizations providing each tool type

Today, most organizations (54%) are trying to buy back some of their staff's time by purchasing or creating password reset solutions for use by end users.
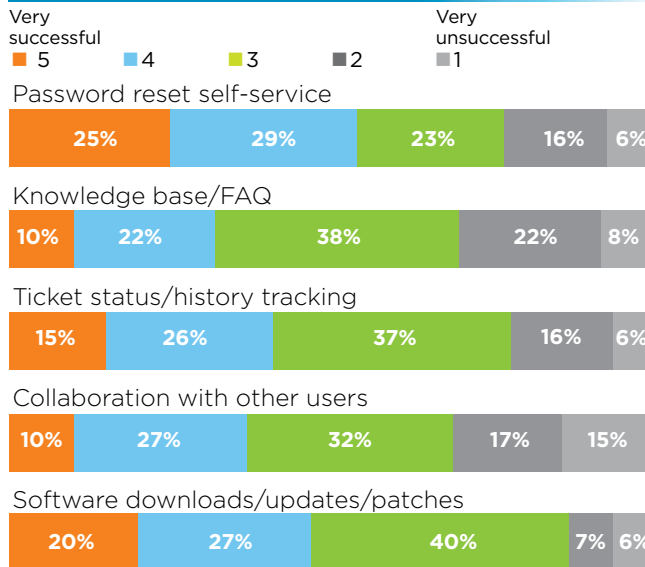
In addition, 54 percent of organizations allow end users to search for solutions to their issues via access to a knowledge base or FAQs. As we've discovered through other HDI research, access to knowledge is one of the most common factors contributing to decreases in ticket volumes. End users access the knowledge base, along with password-reset tools and ticket status tracking, most commonly through a self-service portal. It is also common (56%) for an organization to provide knowledge base access through the company (or IT's) website, instead of, or in addition to the self-service portal (location to access each tool is displayed in Figure 2).

Figure 2: Where Each Self-Service Tool Can Be Accessed

	Mobile app	Self-service portal	Company (or IT's) website (not a portal)
Password reset self-service	16%	62%	44%
Knowledge base/FAQs	18%	59%	56%
Ticket status/history tracking	15%	73%	39%
Collaboration with other users	19%	38%	50%
Software downloads/updates/patches	8%	43%	46%

Percentage of organizations providing access through the following channels (includes only those with each tool)

Figure 3: Success of Self-Service Tool Types

Very successful
■ 5　■ 4　■ 3　■ 2　Very unsuccessful ■ 1

Password reset self-service

| 25% | 29% | 23% | 16% | 6% |

Knowledge base/FAQ

| 10% | 22% | 38% | 22% | 8% |

Ticket status/history tracking

| 15% | 26% | 37% | 16% | 6% |

Collaboration with other users

| 10% | 27% | 32% | 17% | 15% |

Software downloads/updates/patches

| 20% | 27% | 40% | 7% | 6% |

Percentage of organizations providing each tool type

Figure 4: Time Using Current Tool

■ Less than 12 months
■ More than 1 year, less than 2 years
■ More than 2 years, less than 3 years
■ More than 3 years

IT service request form

- 21%
- 14%
- 11%
- 54%

IT incidents form

- 19%
- 18%
- 12%
- 51%

Non-IT tickets form

- 15%
- 14%
- 16%
- 55%

Percentage of organizations

For a self-service tool to be successful, it needs to be useful and utilized. Password resets appear to be the most successful type of unassisted support tool, with one in four organizations reporting that their tool is very successful. Very few organizations (one in ten) report great success with the self-service knowledge available, either through tools that enable collaboration with other users or through access to the knowledge base. In fact, more than 30 percent say these tools are currently unsuccessful in their organizations. While one respondent shared their success with collaboration, "[Collaboration has] improved the ability to solve issues outside the service desk," another response made a point that "other users don't always have the right information, and this can cause other issues to arise."

It's very interesting to learn that 54 percent of organizations provide knowledge bases for customer use, yet less than one-third of those respondents say those tools are successful. Based on the write-in comments, poor or outdated content, as well as marketing and communication about the tool, play into low acceptance and usage by end users, which has an effect on success. Figure 3 illustrates the success of each tool type.

Online Forms
Of the organizations surveyed, 81 percent provide an online form through which end users can submit their own support issues. End users are more commonly able to submit IT service requests (72%) than IT incidents (66%)
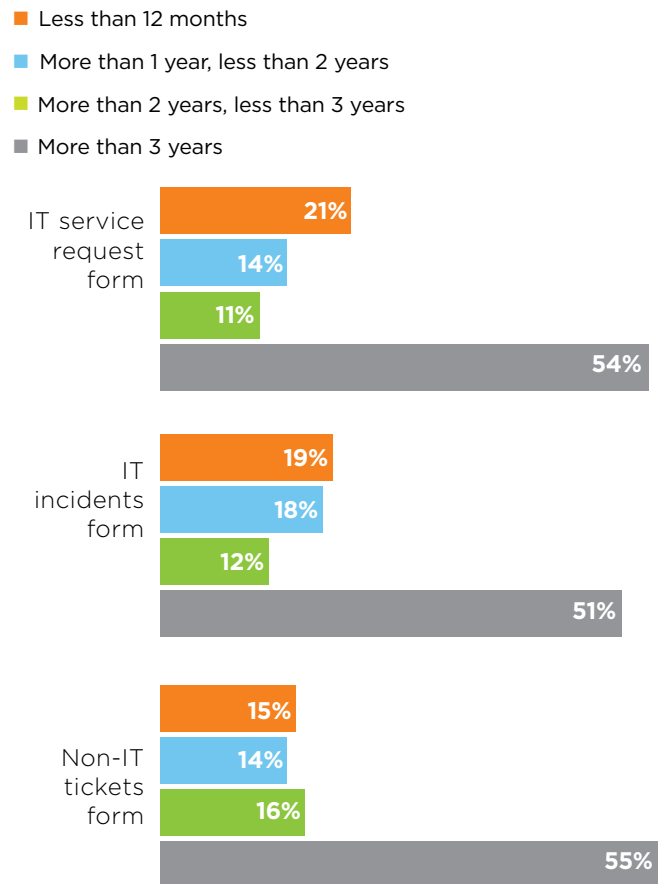
through the online forms. In addition, 34 percent of organizations provide an online form that allows end users to submit issues for support for non-IT-related issues. Most organizations with online forms currently in place have been using their current solution for longer than three years (Figure 4). More than half of those who don't currently have an online form are planning to implement one soon, and those who aren't planning to implement this channel most commonly report that they don't have the staff to implement or support it (30%).

"You can now reset your password from anywhere with Internet, and it has reduced password calls by more than 80%."

— Survey Respondent

Username:

Password:

○ Remember Me
○ Forgot Your Password? Click here.

Submit

Register
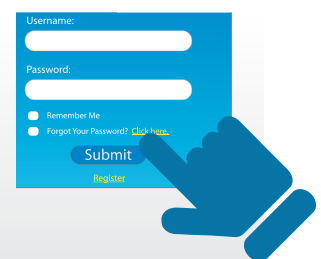
Self-service portals are the most common location for end users to be able to access the online form and submit their issues (Figure 5), which may or may not provide self-service options (e.g., knowledge base, downloads, password resets, ticket history) that enable them to resolve their own issues. A non-portal location on a company or IT website is also a common place for the online form to live. Mobile apps, while less common, are available for end users in some organizations. We expected a deeper analysis of the results to reveal that organizations with newer solutions (i.e., less than one year old) would be more likely to have the form available in a mobile app, but this assumption wasn't borne out by the data. Mobile app use does not increase for those with newer technologies. However, both mobile app and self-service portal use for online forms does increase for the group that has had their current technology for two to three years. It's possible that these organizations have established their online form processes and adoption well enough to add the mobile app feature.

One of the struggles that resonated through the industry years ago, when email was establishing its place as a contact channel, was around the use of email for urgent issues. Phone was the quickest means of addressing an urgent issue, yet high-priority tickets were being sent to the support team via email. Addressing SLAs and educating end users has helped set expectations and adjust behaviors in some industries, but the same measures aren't being taken consistently for online forms. In 68 percent of organizations, support staff can access tick-

> **"Call deflection components have reduced costs of managing cases and improved customer experience efficiencies."**
> **— Survey Respondent**

ets submitted through the online form; 52 percent route tickets depending on type, while 30 percent assign tickets based on skills. More than half of organizations don't have staff dedicated to handling tickets submitted by end users through the online form. Only about one-third of organizations (34%) have an analyst or team dedicated to this channel during business hours. Most commonly, online tickets are addressed between phone calls or as agents have availability. What are these organizations doing to prevent urgent tickets from being submitted to an unmanned channel?
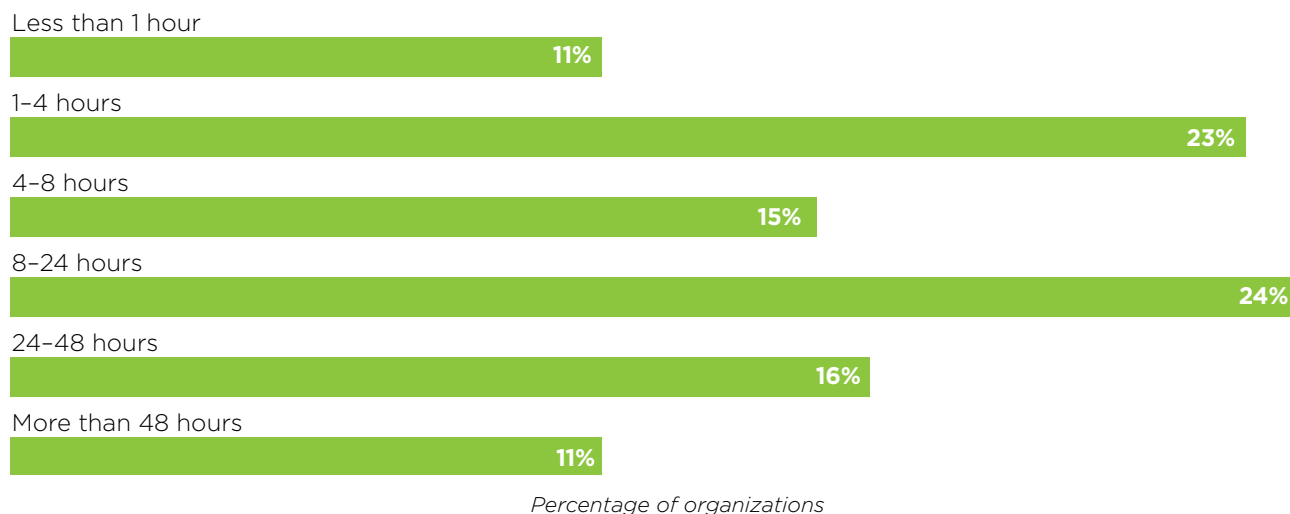
Only 39 percent of organizations discourage the use of an online form to submit urgent issues, and they communicate this to their end users. One of the ways to set and communicate expectations with end users is through the use of SLAs for the support channel. The use of SLAs for online forms and the actual SLAs set vary widely across the industry. Twenty-one percent of organizations with online forms don't have SLAs in place for this channel. Those that do are all over the map in terms of the time it takes to respond to an issue submitted online.

Figure 5: Where Each Online Form Can Be Accessed

	Mobile app	Self-service portal	Company (or IT's) website (not a portal)	Other
IT service request form	15%	68%	44%	5%
IT incidents form	15%	69%	43%	7%
Non-IT tickets form	12%	58%	47%	8%

Percentage of organizations providing access through the following channels
(includes only those with each type of form)

Figure 6: SLA for Time to Respond to a Ticket Submitted Through the Online Form (includes only nonurgent tickets)

Less than 1 hour
11%

1–4 hours
23%

4–8 hours
15%

8–24 hours
24%

24–48 hours
16%

More than 48 hours
11%

Percentage of organizations

While about a quarter of those who provide online forms see improved customer satisfaction/user experience and/or more efficient support (Figure 7), the average reported success ratings for online forms are barely above neutral. Only about 20 percent report their forms as being a 5 (very successful), while the largest percentage (with regard to IT forms) reported a success rating of 3 on a 5-point scale.

Respondents were asked to explain their rating. Those who rated their tool highly spoke mostly about convenience for end users: by providing another option for contacting support, customers don't have to wait on the phone for a resolution.

Knowing what we do about our community, it was no surprise to find the biggest hurdle to overcome is adoption—that is, getting end users to actually use the tool. Survey respondents also struggle with end users submitting incomplete or incorrect information from the customer through the online form. This phenomenon could cause longer resolution times and handle times when agents need to reach out to customers to collect additional information. In these scenarios, online forms add additional touch points instead of removing them.

Figure 7: Top Benefits of Online Form Use

Rank	
1	Improved customer satisfaction/user experience
2	More efficient support
3	Improved perception of IT
4	Better documentation
5	Better reporting
6	Increase user productivity
7	Impact on performance metrics
8	Increased number of tickets
9	Less support staff needed
10	Other

"We placed a specific Top 10 list on the service desk homepage to educate customers on the information needed to assist them. Adoption was eased by multiple videos and numerous emails/how-tos showing how easy it was to use the self-service tool."

–Survey Respondent

Figure 8: Rating the Success of Organizations' Current Online Forms
Does it benefit both the end users and the support team?

IT Service Request Form

Rating

5	21%	Rate it very successful	53% rate it at least somewhat successful
4	32%		
3	35%		
2	10%		13% rate it unsuccessful
1	3%	Rate it very unsuccessful	

IT Incidents Form

Rating

5	19%	Rate it very successful	50% rate it at least somewhat successful
4	31%		
3	36%		
2	11%		15% rate it unsuccessful
1	4%	Rate it very unsuccessful	

Non-IT Tickets Form

Rating

5	19%	Rate it very successful	53% rate it at least somewhat successful
4	34%		
3	31%		
2	13%		16% rate it unsuccessful
1	3%	Rate it very unsuccessful	

Note: Percentage of organizations does not total to 100 due to rounding

Figure 9: Biggest Pain Points or Hurdles to Having a Successful Online Form

Rank	
1	Adoption by end users: Getting end users to use the tool
2	Collecting the correct and needed information from end users
3	Corporate buy-in
4	Additional staff needed to support this channel
5	Decreased efficiency for support

However, organizations are working to improve the success of their online forms. Write-in responses revealed some common solutions:

- Implementing a continuous improvement cycle of collecting feedback from customers and actively updating the form and process based on that feedback
- Consistently educating end users and staff
- Proving the value and gaining buy-in at the executive level
- Removing email as a support channel
- Communicating the convenience of using the online form
- Overhauling the form to make it user-friendly and to make it easier to enter the correct information

For those organizations that do provide this contact channel to end users, about 21–30 percent (median) of their total technical support tickets are submitted via the online form. The percentage of tickets submitted through online forms is higher for smaller organizations that use it, possibly due to fewer incoming contact channel options, such as chat or text, available to end users. Figure 10 breaks down the current use, practices, and success of online forms for different sizes of organizations. Larger organizations are more likely to provide online forms, but their reported success is lower. Only one in ten large organizations report their tool's success rate as "very successful." These larger organizations are struggling with collecting the correct and needed information from end users through online forms, while smaller organizations are trying to get end users to use the tool at all.

Figure 10: Information about Online Forms for End-User Issue Submission (by Size of Organization)

	Small (Fewer than 2,000 customers)	Medium (2,000 – 10,000 customers)	Large (More than 10,000 customers)
Have online forms for end users to submit their own issues	66%	75%	93%
Most common means of accessing online forms	Self-service portal	Self-service portal	Self-service portal
Most common time with current tool	More than 3 years	More than 3 years	More than 3 years
Success of tool (5 = Very successful)	3	4	3
Tickets submitted by end users through tool (median)	31-40%	21-30%	21-30%
Have SLAs for online form submissions	81%	75%	79%
Most common SLA for response time to issues submitted through online form	4–8 hours	8–24 hours	4–8 hours
Biggest hurdle	End-user adoption	End-user adoption	Collecting the information needed
Biggest benefit	Improved customer satisfaction/experience	More efficient support	Improved customer satisfaction/experience

Conclusion

If your organization is struggling with any of the tools provided to empower end users, you aren't alone. Based on the survey results, the industry as a whole has not fully realized the potential benefits of self-service technologies even though most organizations have had their technology—specifically online forms—in place for more than three years. It's important that organizations find the best technology solutions for their customers; yet, it's equally important to focus on communicating with customers every step of the way. Market the value and the benefits of utilizing the available technology. Make sure their expectations are appropriately set, and educate them on the required and suggested use of the technology. The tools you provide should benefit the support organization and empower end users, not frustrate them.

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