

Automation Strategies and Common Pitfalls

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Introduction

Automation technologies are becoming increasingly commonplace within the IT industry, which has brought about perceived opportunities as well as threats for service desks. While simple automation can greatly reduce the amount of time an analyst spends on basic, repetitive tasks, and increase the efficiency of the service desk, the future of this technology can cause some service desk professionals to feel intimidated. The service desk must consider a number of factors when planning to integrate automation into its service; this report will explore these considerations to allow you to evaluate if and how automation could improve your service.

Automation has developed considerably in the last few years – new technological advances have allowed the capabilities for automation to grow and become more complex. Combining automation and ITSM has allowed service desks to transform their processes and workflows, as well as the service their customers receive.

Automation has been around for years in several forms. One of the most common automation capabilities within an IT support operation is a password reset support option, with around 60% of service and support organisations having a self-service password reset capability.¹ In 2016, when surveyed, 33% of respondents identified that more than 25% of calls to the service desk were password related, with 11% identifying that this proportion was over 40%. Therefore, it is clear to understand why automation is becoming an essential capability on the service desk.

¹ SDI, Password Management On The Service Desk, 2016.

Automation in ITSM

Examples of automation in ITSM include: ticket logging and/or routing; account creation; and reporting. Automating elements of a process can help improve the efficiency, speed, and throughput of that process. An example of this would be automating account creation to support the onboarding process, or ticket logging and/or routing to support the incident management process. There is also the potential to automate aspects of service; for example, a self-help portal can use automation to direct users to knowledge base articles to attempt to solve their issue. There is also the possibility of automating routine service requests.

Robotic Process Automation (RPA) is undeniably becoming a significant asset in IT Service Management. Alongside self-service and other elements of service automation, the ability to automate basic and repetitive processes, such as data entry and batch processing, has become a popular tool optimization capability for service operations. By utilising RPA, service desk staff are able to intelligently optimize workloads and effectively automate tasks that otherwise would require low value human intervention. This allows more resource time to be spent on more valuable and proactive tasks.

While traditional automotive functionality, such as password resets or ticket routing offer efficiency benefits, RPA harnesses the power of software with artificial intelligence and machine learning capabilities to handle high-volume, repetitive tasks. For example, RPA software can be trained to capture and interpret the actions of specific processes in existing

software applications, manipulate the data, trigger responses, initiate new actions, and communicate with other systems autonomously.

Self-service and self-help capabilities are also encompassed in automation. Both capabilities have rapidly gained popularity, and are continuing to advance and become more ingrained into everyday service. Utilising automation in support channels can be a great asset to a service desk, and has the potential to increase efficiency while reducing costs. If successfully implemented and maintained, customers can also realise the benefits of service automation, which can improve customer experience (CX).

A knowledge base also is an excellent resource for a service desk internally, but it is also a critical element to a self-service capability, and can help ensure its success. Using automation to link a self-service portal to a knowledge base can allow end users to solve their own incidents, for example by utilising suggested help and Natural Language API. A Language API works by analysing text to extract data from content such as concepts, keywords, categories, relations and semantic roles. Therefore, if a user is logging an incident on a self-service portal, a Language API can potentially link the content their inputting to a knowledge base article, and guide the user towards this before allowing them to complete the ticket logging process. This promotes user education whilst removing a number of simple yet time-consuming tasks from service desk analysts.

Automation can also lead to better cohesion between incident and problem management. After an incident has been logged, automation can be utilised to review and record recurring incidents, which allows problem management to work more proactively to perform root cause analyses (RCA), and find a solution or work around. If a customer calls the service desk with an incident that is a known error, automation can be used to show the service desk analyst a recorded work around in order to speed up the resolution of the ticket.

However, despite the potential benefits of automation, none of it is possible without suitable people, processes, and technology. Automation can be a daunting prospect for service desks, and holds the potential to go wrong if implementation and maintaining is handled poorly. Therefore, there are a multitude of considerations that any service desk should take on board before automating processes and services.

Common Pitfalls

We have established that it is essential to involve the customer when planning to implement any type of automation. It is possible that a customer-centric focus may be neglected in favour of driving down costs, for example, if an automation initiative is led by the business solely as a cost cutting exercise. Instead, it is important to consider what channels the customers would be most willing to use, and how automation will make their customer journey easier and more pleasant. Automation projects often fail because organisations do not implement the best solution for their customers, and therefore they are more inclined to bypass alternative automated support channels, and continue to call the service desk.

Quite often, automation initiatives go awry due to making service automation, such as self-service, too complicated, which can potentially cause it to become counterproductive. For example, when calling the service desk, automatic speech recognition can cause customers to become frustrated if there are too many steps, and may have to repeat themselves for their command to be understood. This can lead to simple enquiries taking longer than necessary, and will inevitably have a negative impact on customer satisfaction. When implementing an automation initiative, the business needs to consider how a customer would use the service or support channel, the typical customer journey, and how to resolve issues as quickly and effectively as possible. Unnecessary complexity can have a negative impact on customer satisfaction.

A considerable error some service desks may commit is to not integrate new automation ventures into existing infrastructure.

Implementing stand-alone automation can present problems in terms of user friendliness. Segregated automated processes or support channels can lead to end users running into barriers in service; for example, if a stand-alone self-service feature has not been “trained” to deal with a specific scenario, the end user would then need to restart the ticket logging process, and provide multiple pieces of information regarding their issue again. This can have a negative impact on CX, and lead to frustrated customers and a lower user adoption rate of alternative support channels.

Another example where it would be necessary to integrate automation into existing infrastructure would be for new starters. Automating the onboarding process can significantly reduce the time spent on account creation, payroll set up, administration matters, and so on. However, implementing onboarding automation separately on IT, HR, and Finance service desks can be counterproductive, and create a fractured process. However, integrating the automated processes can create a seamless flow between each department, and could allow the onboarding process to become incredibly efficient and effective.

When implementing automation, it can be tempting to automate everything at once. However, this can present problems in ensuring accuracy and speed of deployment. It is important to start automating simple processes or services, especially if automation will play an integral role on the service desk in the near future. Expanding at a rate the service desk can cope with is necessary to ensure success in an automation project.

The usual considerations for implementing anything with ITSM are still relevant for automation. Considering the existing security regulations, infrastructure, and resources, as well as the potential cost and return on investment (ROI), integrability, and scalability are vital when planning to automate on the service desk. However, there are several things that may not be as obvious to consider.

The Service Desk

Firstly, a service desk's processes need to be reviewed to ensure that they are as efficient as possible, and there is no waste or non-value-add procedures. Furthermore, a simpler, more user-friendly design for automated support channels will mean users are more likely to have a good experience, and could increase user adoption. Ensuring that automation initiatives are designed with the end user needs is essential to good CX.

It is important to consider whether you have sufficient and adequately distributed resources on your service desk before implementing automation. While automation can significantly reduce the workload of service desk analysts, if there are too few analysts to sufficiently deal with the volume of traffic to the service desk, or there are not ample servers infrastructure to support faster processes, then it may be difficult to ensure the success of automation on the service desk. One method to ensure that all resources are accounted is to have a robust configuration and asset management process in place.

Communication

Communicating with stakeholders about the impact on them, their concerns, and their thoughts regarding automation is essential to its success. It is also important to consider the impact that the shift towards automation will have on service desk analysts. Automation aims to remove repetitive, low value tasks from analysts, improve the service the customer receives, and improve the efficiency of the service desk and, in turn, the wider organisation. Implementing automation capabilities without considering the implications it may have can be detrimental to the company. One example could be that an unnecessarily complex procedure has been inadequately automated and slows down a process, which can have a knock-on effect on an analyst's ability to perform their job. The impact that automation will have on your customers is also significant and deserves consideration. You might also consider including customer opinions and feedback when implementing automation on the service desk. Understanding how customers use your service and what contributes to a negative experience will aid the decision as to whether automation, such as a self-service portal, will benefit customers and increase CX.

The Business

For the most part, securing buy-in and budget for an automation project will require the business' input. As such, it is necessary to consider the wider impact of automation, i.e. how the business will be affected and, hopefully, benefit. One example would be to consider the ROI that can be gained from investing in automation, as well as the non-fiscal value that could be achieved.

As well as considering the impact on the business, it is necessary to align the service desk objectives with those of the business. However, before this, the service desk needs to consider what it hopes to achieve with automation; is the main motivation to improve CX, process efficiency, KPIs or reduce cost? Does the service desk want to reduce time analysts spend on low value tasks, such as password resets, to allow more time to be spent on meaningful and proactive work? Establishing what the service desk aims to accomplish with automation will allow suitable KPIs to be set, which will also allow the service desk to monitor the success of the automation implementation.

External Expertise

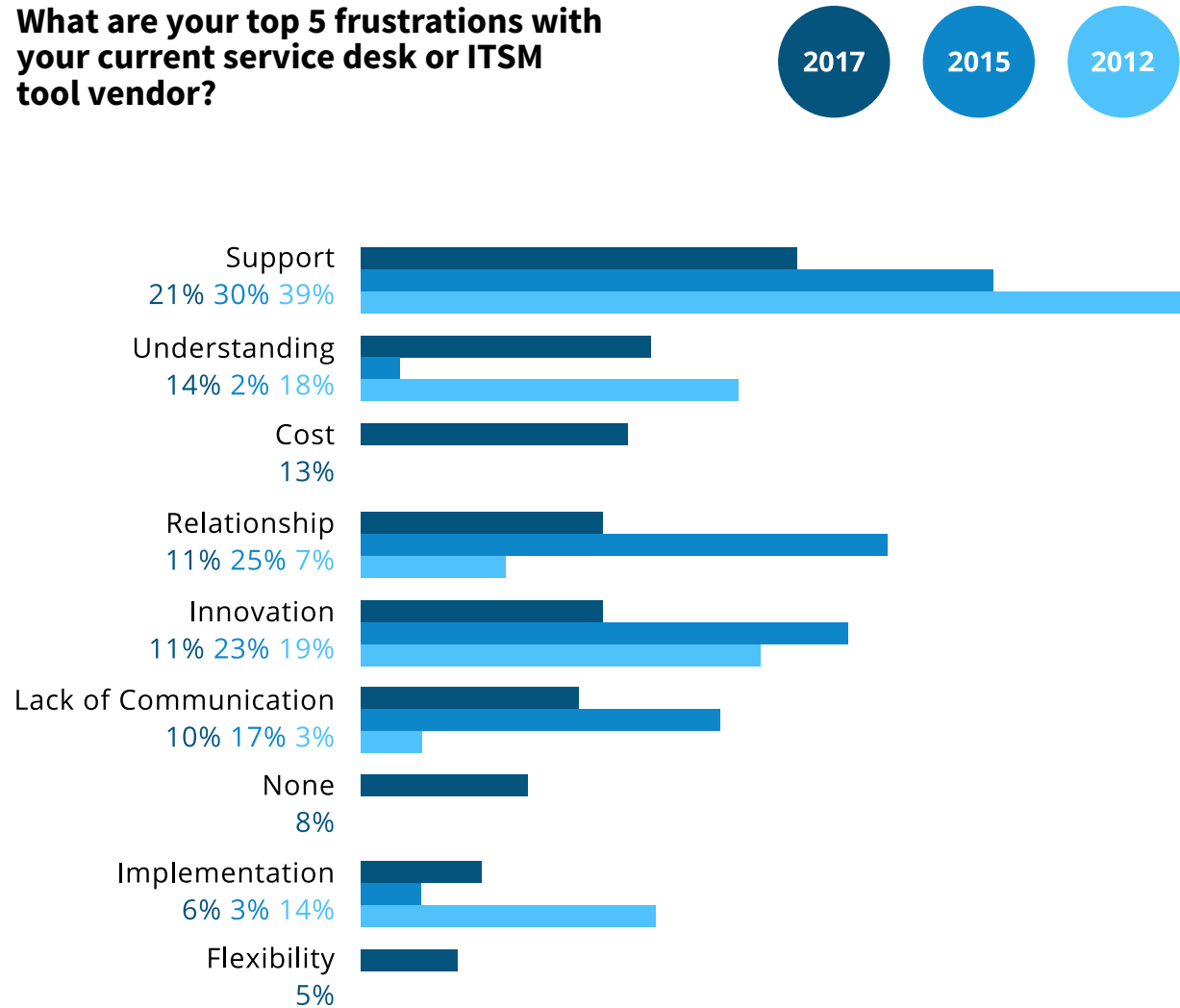
It is also important to determine whether there are employees in IT who have the necessary skills to implement and maintain automation on the service desk. It is possible to bring outside expertise into the service desk to implement automation into the products, services, or processes. However, this can present problems, as even with the best intentions, external professionals may not fully understand the business, which could lead to a negative impact on the service the service desk provides. This further supports the point that a service desk should review its processes in order to better understand the impact shifting towards automation could have. If your automation initiative includes implementing a service management new tool, or developing an existing one, to integrate automation on the service desk, there must be some consideration around tool vendors and selecting the right one for your organisation. Working

Steps to success

with an external vendor to implement automation can have a significant impact of the service desk, but the challenge is ensuring that impact is a positive one.

Many service desk professionals run into problems when working with vendors, and find that the relationship is fraught with frustrations. In 2017, 14% of service desk professionals identified that one of the main frustrations with their tool vendor stemmed from a lack of understanding of the business.¹ Therefore, to avoid this frustration and the potential problems this can present, it is essential to work closely with a vendor to ensure that all service desk and business needs are met. Assuming that it would be essential to develop and maintain the tool or capability over time, it is also important to consider whether it would be necessary to employ or train staff to develop this internally, or whether a future relationship with the vendor will need to be maintained.

What are your top 5 frustrations with your current service desk or ITSM tool vendor?

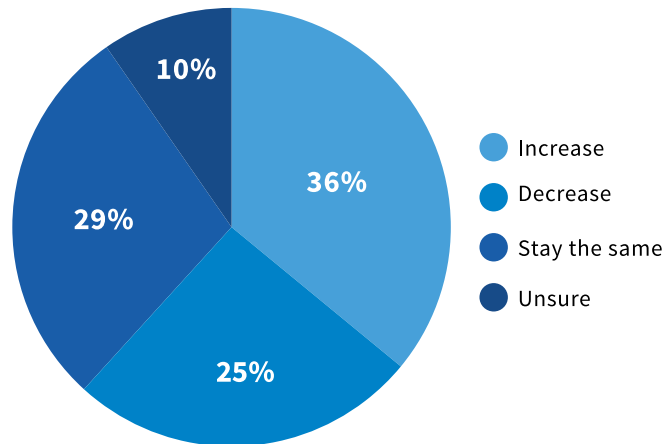


¹SDI, A View From The Frontline, 2017

Automation and Analysts

There is a perception within the ITSM industry that automation, alongside other advanced technologies (i.e. Artificial Intelligence and Virtual Assistants), will cause service desk analysts to lose their jobs. However, recent data suggests that the majority of service desk professionals actually believe that headcount will either stay the same or increase in the near future.¹

Do you think service desk headcount will increase, decrease, or stay the same in 3 to 5 years' time?



While automated support channels, such as self-service, can displace basic service desk analyst tasks, there is still a significant amount of work that will still require human involvement. As such, the role of the analyst will not become redundant or replaced by technology; instead it will evolve into a role where technical knowledge and skills become more integral. This will enable them to work alongside automation, and deliver a more efficient and effective service.

Conclusion

Clearly, there are many factors to consider when planning to undertake an automation initiative, from the existing state of the service desk, to how automation will affect different groups of stakeholders, to how the service desk will develop with automation in the future.

One of the most important methods of ensuring the success of an automation project is to communicate with all stakeholders at all points throughout the process. Adequately communicating how different groups will be affected and potentially benefit from automation can relieve fear of change and development that some stakeholders may have, and addressing customer concerns can lead to customers feeling valued.

Despite automation not being a new topic, only now is it gaining mass recognition within the industry; as such, there is little knowledge or best practice surrounding the topic. However, due to newer developments with automation, there are now greater possibilities and advantages for the service desk, and as such more content which aims to set some guidelines for implementing.

About SDI

The SDI company mission is to inspire service desks to be brilliant. To achieve this mission SDI has developed a set of goals by which it aims to inspire service desks to:

Embrace:

To raise the quality of service delivery by valuing best practice

Engage:

To create an inspiring and engaging customer experience

Invest:

To empower their teams to be inspired, take action and be better

Shine:

To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery. For more information about SDI please visit www.servicedeskintstitute.com

Automation: The Alemba View

At Alemba, we are big advocates of considered IT process automation. After all, automation can help you achieve a wide range of game-changing benefits, including freeing up Service Desk staff from repetitive tasks, drastically reducing call resolution times, and the speedy identification and elimination of problems.

However, automation purely for the sake of automation can lead to a great many pitfalls. We have found that a more systematic approach to IT automation is usually the wisest route. As this report illustrates, there are many considerations to bear in mind when first considering implementing IT automation. This includes existing automation efforts, identifying suitable processes for automation and key indicators for success.

Depending on your organisational and process maturity, you may find that a 'low-hanging fruit' approach to automation works best for you - start by automating those services that would be the easiest to do and have the largest impact. Every organisation is different and it is important that you take some time to identify an automation strategy that best fits your unique requirements.

Alemba assists organisations in scoping and implementing bespoke automation projects across the entire business.

The vFire Enterprise Service Management solution combines a powerful drag-and-drop workflow engine, dynamic forms designer, integration platform, and self-service storefront to deliver true end-to-end automation. An approval and human orchestration system ensures compliance and governance.

From on-boarding new starters to automating the provisioning of virtual environments, vFire is built for complex business process automation.

Use Case: Liverpool City Council

Liverpool City Council implemented vFire to end-to-end automation of their procurement and business change processes. vFire is utilised to present the council's ICT customers with self-



service access to the various services they provide. Known internally as the Userhub, vFire allows all faults to be reported through the 'Report it' option with the information pushed through to the core vFire application.

Similarly, the majority of the council's Service Requests (over 100) are now available through the 'Request it' option. The council saw the benefit of being able to automate approvals, notifications and allocation of tasks. Consequently, they have built workflows for all of these Requests, allowing the customer to identify and select what they want and then raise their Request from the Userhub.

Other menu options such as 'Relocate it', 'Dispose of it' and 'How do I' provide links to pages on the Liverpool City Council Intranet. The 'Tell us about it' option pushes feedback, compliments and complaints into the vFire system.

One of the council's business drivers was to increase customer self-service and reduce call-handling. Within months of implementing vFire, telephone call volumes to the ICT Service Desk were reduced significantly.

For the last 3 months, compared to the same 3 months in 2016, Liverpool City Council have seen a 30% reduction in phone calls to their ICT Service Desk.

"I like the fact that the system is very configurable. This has given us the opportunity to challenge existing processes and look at how best we can deliver our service using vFire and the underlying automation it offers." - Brendan Lavelle, Programme Manager at Liverpool City Council

If you are interested in finding out more about vFire's automation capabilities, you can visit our [website](#), contact us info@alemba.com or read one of our case studies to see how we've help some of our clients achieve automation success.