

The Service Portal Reimagined:

Getting Started With An Innovative Service Portal

Session #503



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Thank you for providing me with an opportunity to be with you
(after all, you could be at Universal or Disney)

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About me...




- Author Blogger
- International Keynote Speaker
- Winner, 2023 HDI Lifetime Achievement Award
President itSMFi 2019-2021
- ITIL v3: Expert
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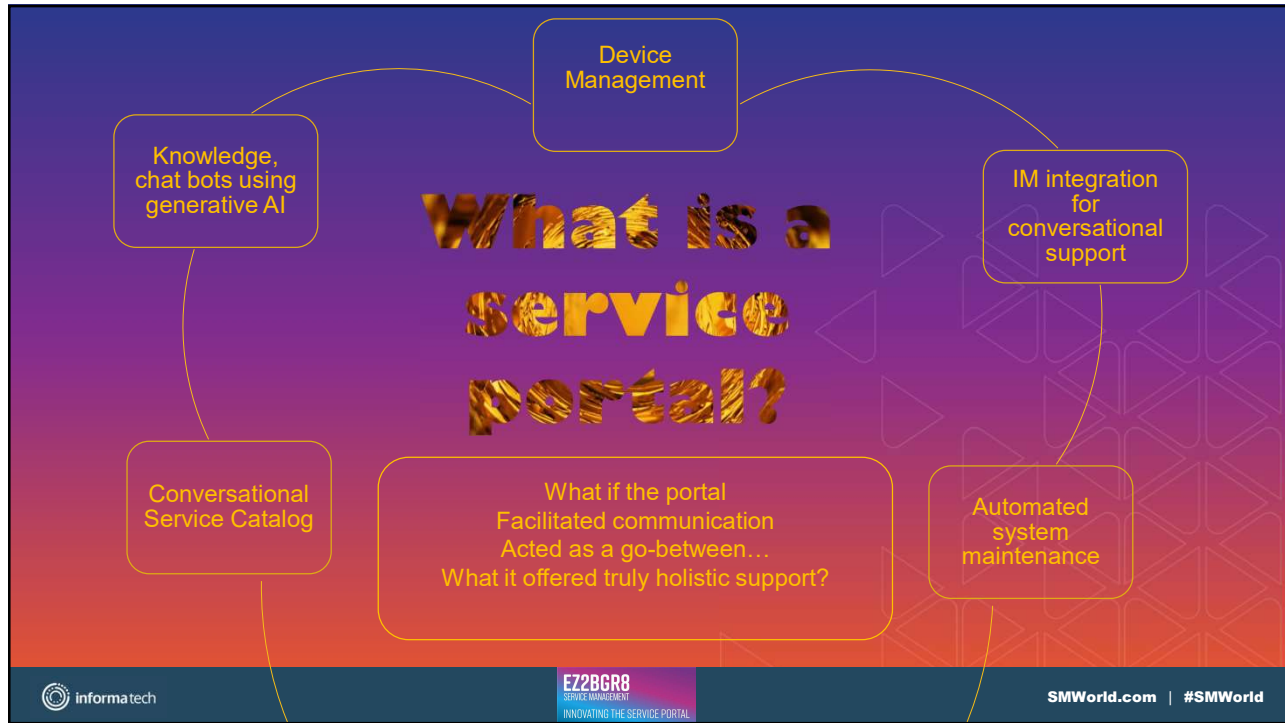
What is the Service Portal?



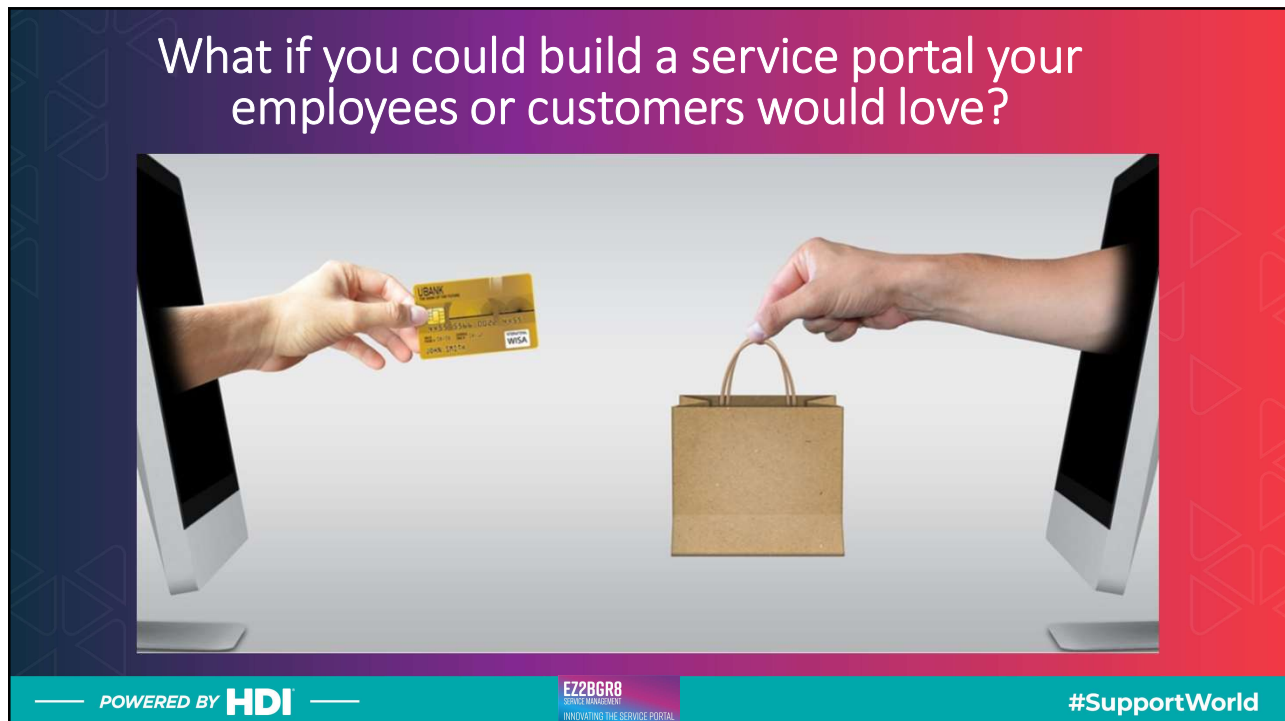
- The entry-way to the organization's services
- Online service channel, providing information and support
- IT or Enterprise-Wide online employee support

A poorly designed service portal can damage the user experience and lead to customer loss or employee dissatisfaction

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Why do portals offer poor experiences?

They are not designed for employees/customers!

- IT implements them to **lower call volume**
- The focus is enabling **ticket submission**, not a genuine self-service environment
- **Taxonomy is too technical**, people can't find things
- Organizations **"set it and forget it"**
- **Content is missing!** There is little information, no knowledge/tips/FAQs, and no context for the support experience
- They don't support a real **omnichannel support**

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Designing the portal experience requires an organization to design a holistic support model:



Using innovative solutions to deliver an excellent support experience

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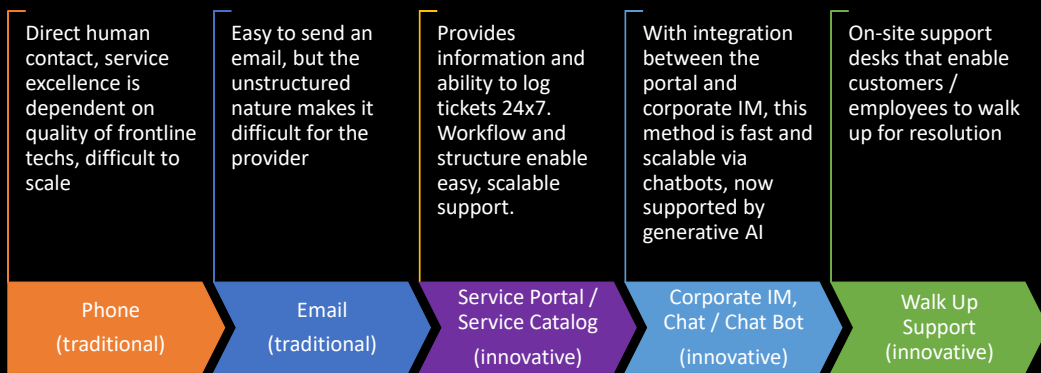
Designing the portal experience requires an organization to design a holistic support model:



Understanding support channels and the employee / customer's expected experience is critical to the outcome

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Support Channels

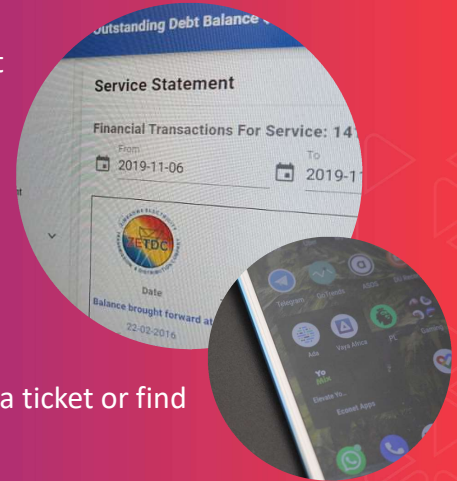


A diverse workforce of different generations and work styles will choose different support channels!

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Service Portal / Service Catalog

- Online service channel, providing information and support
- Customer-facing portals are becoming very popular, but if not properly designed can damage the customer experience and lead to customer loss
- The portal is designed to offer self-service:
 - Ticket Submission
 - Help via knowledge bases
 - **Beware: this is NOT self-service**
- Self-service is **automated fulfillment**, not the ability to log a ticket or find instructions for self-resolution



A portal and self-service are innovative if they use modern technology and design thinking to realize the channel's true potential.

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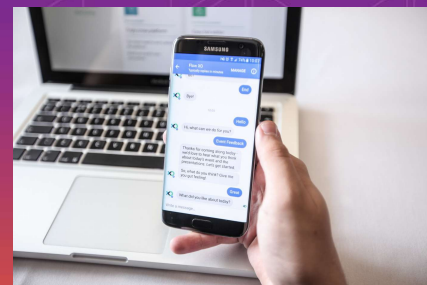
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Chat / Bots (AI)

- Chatbot adoption has been slow due to its complexity
 - Requires establishing conversations for every outcome
 - Best results require a mature knowledge base
- Portal chat integration with IM programs like Teams and Slack offers a better user experience and higher adoption levels
- Generative AI and Generative AI Knowledge Bases are changing the game!



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Walk Up Support, Vending Machines and Lockers



Walk-up centers, concierge desks, vending machines, and lockers provide an instant service environment, improving support (especially in a hybrid office setting).

Best-of-breed portals offer:

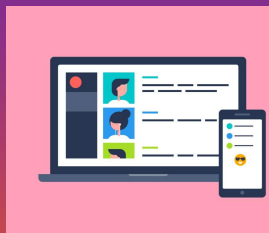
- the ability to register for an appointment
- add your name to a list for walk-up
- use QR codes via automated emails for hardware exchanges and approved locker pickups
- Vending machines can be keyed to use cost centers and credit cards enabling easy access to supplies, accessories

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Omnichannel Support



- Support follows the user through the entire journey
- Regardless of where they start, a ticket is created in the background and made available in any subsequent channel they leverage
- Think portal to phone, chat to phone, chat to portal, walk up, locker...all support channels are integrated



Omnichannel support addresses a customer pain point:

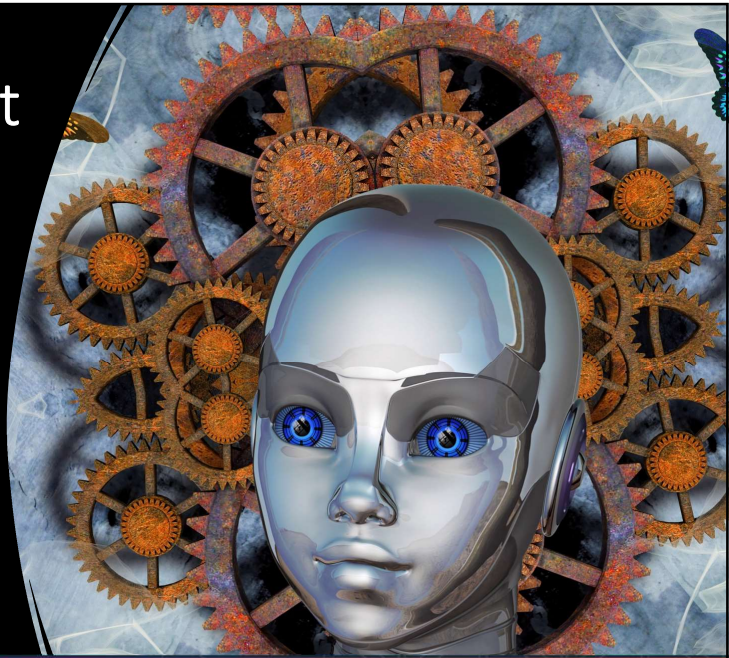
Why do I need to enter or tell an agent the same information over and over?



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Reimagining Support

- Generative AI knowledge integrated with corporate IM may become the future of portal interactions
- Phone support can be done through corporate IM, a phone assistant like Siri or Alexa
- The portal and service catalog will still power these interactions, but customers can choose how they communicate
- Proactive incident management will reduce the need to interact even further

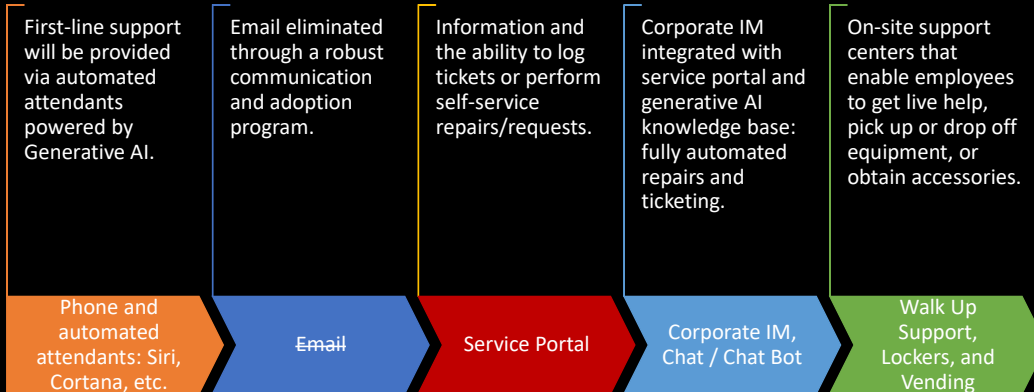


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Reimagining Support: Future Support Channels



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What if you had a conversation with your portal via Teams or Slack like this one?



Why is my PC running slowly?



Various factors can cause a slow PC, often related to hardware, software, or a combination of both. Here are some common reasons your PC might be running slowly: not enough available storage, too many open programs, malware or viruses...

To diagnose and fix a slow PC, you can try the following steps:
- Check your disk space, close unnecessary programs, run a malware scan



Would you like me to run a health check on your PC while you continue to work?

Yes! 😊



I've opened ticket I-292828 for you and started a systems check. I'll inform you of the results.

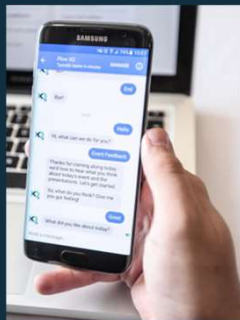
*Using Generative AI, Monitoring, Predictive Analytics, Machine Health Checks, Automation, and Lockers



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Hi, I have the results of your systems check...



My health check found several issues. I deleted temporary files and created more space on your hard drive, addressed some malware issues, and updated all required patches and virus signatures on your computer. It now passes all health checks, and I have closed ticket I-292828. Please let me know if you continue to experience slowness.



My health check corrected several issues, but I also found that your computer is due for replacement. Your replacement was ordered, approved, and provisioned. You may pick it up from locker 39. Use the QR code below to open the locker. Please leave your old laptop in the locker for proper disposal. If you prefer we ship it, just let me know.



My health check found some faulty hardware (your hard drive). A replacement PC has been placed in locker 39. Use the QR code below to open the locker. Please leave your old laptop in the locker for repair and reprovisioning. If you prefer we ship it, just let me know.



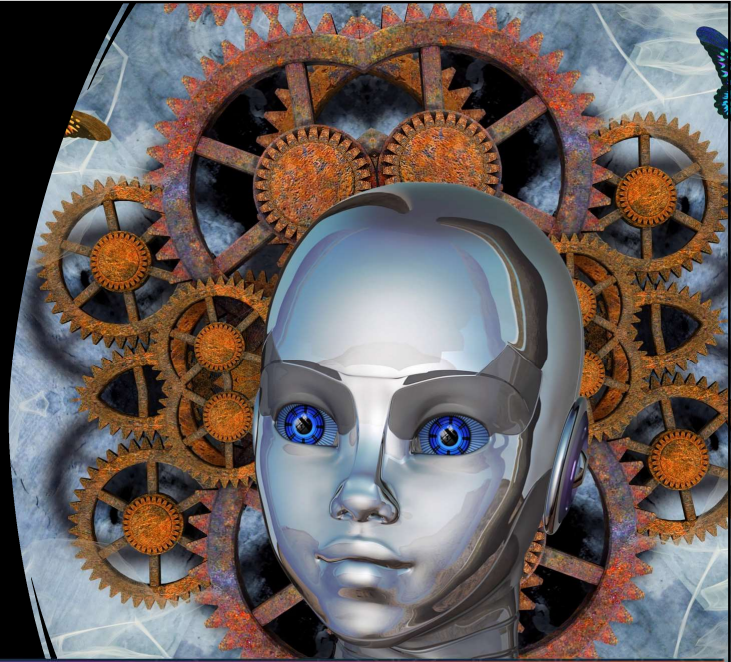
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Does this mean the portal is dead?

NOT
TODAY

- The portal may still be the channel of choice for many users
- The portal will still drive the transactions when corporate IM or automated voice channels are used
- The portal will still sit between the customer's preferred intake channel and the ITSM ticketing system



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Humanizing Your Service Portal Experience



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Start with Modern Approaches

- Omnichannel support
- Automated fulfillment
- Concierge desks, vending machines and lockers
- Generative AI Knowledge, automated support
- Automated employee lifecycle provisioning
- Integrated chat through the corporate platform
- Automated (ticketless) support

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Offer a Robust Portal Experience

- Information
- Knowledge
- Helpful Links
- Goods (Products)
- Services

Service Catalog

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Offer a Complete Service Catalog



- Equipment
- Software
- Accessories
- Office Supplies
- Paper/Ink
- Stationery
- Mobile Devices



- Enterprise planning
- Invoicing / Receivables
- Facility Support
- Building Security
- Travel
- Benefits
- Payroll
- Technical Services
- End User Computing



- Self service computer issue resolution
- Equipment updates
- Requests for enhancements / demands
- Online training and information

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Maintain an Experience Focus

Design Thinking is Critical to Creating the Desired Future State

Digital Blueprints

- ✦ Document the current state process,
- ✦ Add user's feelings about them to identify pain points
- ✦ Include both end users and fulfillers

Value Stream Mapping

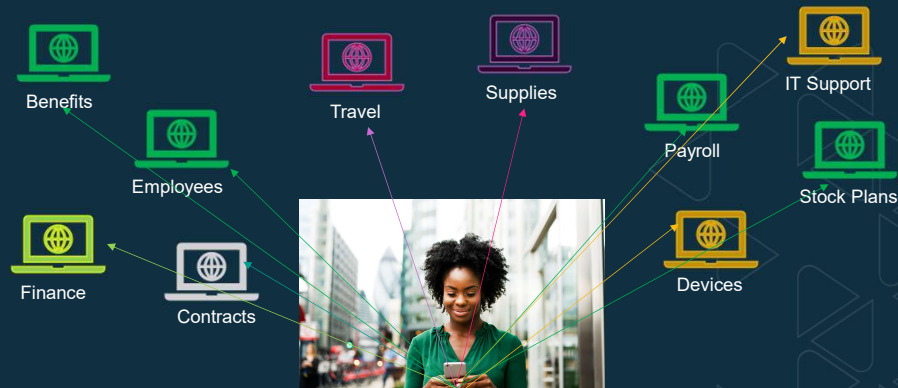
- ✦ For each service, document how fulfillment occurs
- ✦ Look for bottlenecks and pain points
- ✦ Looks for optimization opportunities

Journey Mapping

- ✦ Using the blueprints and value stream maps, meet with stakeholders and design the future state support journeys to be implemented
- ✦ These become requirements

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A Single Portal Offers the Best Experience



Combine all Intranet sites and support portals under one “pane of glass.” Providers can continue to use their systems where needed; use “deep links” and common design elements to drive a unified experience.



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One last thing: A First Impression Starts at Onboarding

What does your onboarding experience look like?

- Is it fully enabled from mobile devices?
- Is there a clear roadmap of their tasks?
- Does it take all providers into account?
- Are back office processes enabled and automated?
 - Employee badges, IDs
 - IT accounts and provisioning
 - Payroll/Benefits and verification
 - Contract/vendor setups
- Remember: Customers are on-boarded too!



Your Service Portal should enable all of this!



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5 Tips to Guide You on Your Journey

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Engage Others
(Stakeholders)

2

Maintain an
Experience
Focus

3

Ensure
Service Levels
are met

4

Organize
Around the
Business

5

Work Like the
Internet

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Final Takeaway: Creating Your Roadmap

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The smartphone screen displays the Service Management World logo, the event dates (November 17-21, 2024), and the location (Loews Sapphire Falls Resort at Universal Orlando). The background of the phone screen shows a boat on a lake in front of a resort building.



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