Q: What is the difference between self-service and self-help?

A: Some organizations use these terms synonymously to refer to any task a user can complete without the assistance of another person. Some companies refer to self-service in the context of tasks linked to the company's service catalog, such as the ability to download software or apply a software update. Such tasks are typically oriented to the Request Fulfillment process. Self-help is then used in the context of more reactive tasks such as customers solving incidents on their own by looking up an error in a knowledge base. Such tasks are typically oriented to the Incident Management process. Your organization can decide whether it's necessary to make the distinction or simply use the terms synonymously. A consideration would be how you want to report on user's activities.

Q: Can we have a few minutes clarification about personalized IT service mainly managed by service desk? How do we measure and express in number the value service desk delivered to the business?

A: The first thing you have to do is understand what the business is doing. ITIL defines a service as a 'means of delivering value by facilitating outcomes' and the service desk must understand what those outcomes are. This type of awareness requires more intimate contact with the business than just handling incidents. The service desk must also look at ways to proactively contribute to business objectives and increase user productivity. Simply minimizing impact is no longer enough. The service desk must become viewed as trusted advisors who suggest ways that users can work more efficiently and effectively. An example would be recommending an authorized App or teaching a user a shortcut which then enables that user to process more loans, close more sales, or ship products more quickly. The concept of Business Productivity Teams is aimed at having that level of understanding in terms of what business users do and then being able to report on how the service desk (or the greater IT organizations) is delivering value in the form of increased productivity.

Q: With a self-service solution, what is the real willingness (or level of trust) by customers to use it vs. calling the service desk by phone and talking to someone live?

A: It depends upon your technology, how it easy it is to use, how well you've done in marketing the availability of that technology, a number of factors. Use your customer satisfaction surveys to listen to customer feedback relative to self-services and do what you can to make improvements. Know too that, to some extent, this is generational. Younger people are far more self-sufficient and often prefer self-services over 'having' to talk to someone.

Q: How can self-service portals be used to distinguish between an Incident or a Request ticket?

A: Typically with self-service, it is more menu-oriented and may be linked to your Service Catalog. You want to be able to track who has requested what service, or who has installed what service and you may need to have mechanisms in place to authorize such services. You also want to ensure any desired linkages to Service Asset and Configuration Management are in place so that you can maintain your Configuration Management System. With self-help, you're typically looking at a knowledge base that with service retrieval capabilities that enable users to location errors messages or symptom and their associated solutions. Knowledge bases are often more difficult to report on but the technology is improving such that going forward we will be able to better track where users have been on our web sites and the path they took in an effort to find a solution.

Q: How do you deal with the quality impact of having short term, contracted staff with fewer privileges than permanent employees.

A: It's a real challenge to have temporary employees on the service desk. You've got to have a robust orientation program in place and you also want to be looking at a methodology such as Knowledge-Centered Support (KCS). KCS would enable you to give the new people coming into the organization a knowledge base for known errors/resolution. It will also enable to you capture the knowledge and expertise of these individuals while they are with you. I encourage organizations to 'stick a vacuum cleaner' to the head of temporary works and capture their knowledge and expertise. The articles you capture don't have to be perfect. A premise of KCS is that you refine knowledge articles as they are being used and publish only those that are most frequently used. If you're having a hard time getting contract workers to document what they are doing you made need to look at the contracts that you have in place and be more specific in terms of requirements. Here's where I can be a bit of a tough guys. Contract works are being paid to do a job and so you are within your rights to demand they do it or have them replaced. The question is; have you been clear when negotiating their contracts in terms of what your expectations are. If not, capture those requirements and ensure they are addressed the next time that contracts come up for renewal.