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Automating Phone Self-Service for IT Service Management

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Introduction

Perhaps there was a time when customers patiently waited on the phone for a support issue to be resolved. Maybe they weren't calling from the car while driving between meetings, not trying to get help with a records system in the 15 minutes between patient appointments, or not processing that week's payroll due within the hour.

Whether your customers are internal or external, they increasingly conduct business away from the office, after hours, or at multiple locations. When they need support, they want it to be convenient and fast. Meanwhile, service desks are continuously working to improve service in this 24/7 environment, while also being asked to lower costs.

Customer self-service has proven to be a viable, cost-effective solution for improving satisfaction and productivity while also reducing the burden on service teams. Self-service delivers a significantly lower cost-per-incident compared to traditional service models. While portals, chat applications, and new technologies like chatbots offer multiple self-service options, the phone call to the service desk still remains a key channel for requesting support and services.

This paper presents several scenarios where an integrated, voice-enabled service management solution can be part of a cost-effective, customer-pleasing communication strategy for service desk teams.

Automated Phone Self-Service

Many organizations offer online self-service where customers can look up frequent issues, log incidents or service requests, or check on the status of a ticket. However, sometimes customers don't always have online access while others still prefer to just pick up the phone. Yet organizations have had limited options and flexibility for handling inbound and outbound communications with traditional phone systems. As a result, most interaction still takes place on a manual, person-to-person basis with the potential for frustrating engagements.

Voice self-service merges the phone with service desk solutions, to extend self-service to every phone call. It can alleviate the challenges and costs of phone-based support for service teams by automating many routine activities and communications like checking on the status of a ticket or resetting a password. Voice automation can also yield significant cost savings given that traditional phone-based support is twice as expensive per-incident as online self-service.

Voice automation can transform and streamline the way organizations interact with internal and external audiences, improving the quality and efficiency of their phone interactions dramatically. It makes information accessible over the telephone for live personal communication as well as self-service. Organizations gain complete control over how and when they communicate, while offering greater flexibility to callers.

Ideally, voice automation shouldn't require separate voice infrastructure, such as a PBX system or specific phones. And organizations should be able to use their existing local area network for voice integration, allowing them to save money while improving service. In fact, analysis of independent cost estimates shows that voice self-service can provide a return on investment in less than two months.

Here are a few examples where voice automation solutions can enhance and expedite both inbound and outbound phone communication and interactions.

24x7 Automated Password Reset

What percentage of your service desk or help desk calls involve resetting customer passwords? Industry estimates indicate up to 35 percent of all calls to a service desk are for simple password resets. Though this is a very simple activity, these types of calls and emails add up and detract from time spent on more critical issues.

Many organizations automate common functions like password reset with voice self-service technology. Leveraging the phone to manage resets automatically, IT

teams significantly reduce the need to personally interact with customers for this type of request. Agents can focus on resolving more complex issues, while expediting password resets. Customers can also get password help anytime they need it, including times when live agents may not be available.

Reset by Phone

When customers call in to the service desk, they are either automatically identified by the phone number from where they are calling or asked to identify themselves securely by entering an ID number, account number, social security number, or any other identifying number. Once identified, the system takes the caller through authorization to ensure a secure transaction. The system can then read back the new password or customers can also choose to have the password e-mailed to them.

When tied to service management solutions, voice systems create and close tickets, supplying organizations an audit trail and a record of the password request for reporting purposes.

Business Impact

- Around-the-clock self-service password reset
- Eliminates service desk calls related to password resets
- Agents can focus on resolving more critical issues
- Significant cost savings are realized compared to person-to-person interactions

Remote Use

Internet technology has resulted in an unprecedented number of remote employees. Service desks and call centers are gaining momentum as particularly viable areas of employment for remote workers. With voice self-service, organizations can now create virtual call centers with little extra cost, allowing workers to work from home with a broadband connection, or in different office buildings throughout the world to provide "follow-the-sun" support.

At-home agents have no direct real-estate costs, and they exhibit lower turnover rates. The same technology provides the option of hosting agents in the office most of the time, or allowing them to work from home during illness, family needs at home, or inclement weather.

Organizations ranging from hospitals to global software companies to school districts have discovered voice self-service and its remote support capabilities to be their communications lifeline during disasters. Agents can remain at home, or report to an alternate location, and continue managing calls and incidents without interruption. They can still route and process calls as though they were in the main office.

Voice self-service also enables organizations to flexibly manage agents based on incident volume. During call spikes, they can add agents at another location to improve call processing.

Business Impact

- Improves incident management during emergencies or spikes in call volume
- Routes calls to different locations as needed
- Reduce staff absenteeism and turnover
- Provides redundancy and emergency backup
- Extends hours of operation
- Lessens response times
- Decreases infrastructure and facilities costs

Automatic Call Back

When customers need assistance, many prefer to log the incident and get back to work, instead of waiting on hold. Voice self-service offers customers more options for how they want to report incidents. They can either choose to wait for an agent, or they can leave a message and receive a prioritized call back.

With voice self-service, a customer hears a message indicating the estimated wait time. They are given the option of logging a new incident and receiving a call back from an agent. When the customer chooses that option, they record a message for the agent. The system confirms the customer's ticket number.

From there, the system queues the call along with all the other live callers waiting on the line. When the agent is ready for the next ticket, the ticket pops up automatically

on the agent's screen. The agent listens to the recorded message attached to the ticket, and is then prepared with all the information needed to address the call as soon as the customer comes on the line. The agent also has complete information in the service management solution about the customer's IT environment, reducing the need to ask callers to repeat themselves.

Business Impact

- Increases customer flexibility and satisfaction
- Automates ticket creation for agents
- Reduces the time to identify callers
- Ensures callers who exit the system are called back quickly

After-Hours Support

Not all support incidents occur conveniently during regular business hours. Plus, customers are dispersed across multiple locations and time zones, often taking care of business when your service desk is closed. But you can improve customer satisfaction by giving them a way to log incidents after-hours and by empowering agents with the information they need to process a call quickly.

When customers call after-hours, voice self-service lets them leave a message describing the incident. Similar to the Call Back scenario, the system creates a ticket in the service management solution automatically and provides the ticket number to the customer for reference. That incident is queued for the next agent. Any agent can then listen to the voicemail before calling the customer back or simply resolve the problem without additional customer interaction. When the issue is resolved, the customer then automatically receives a notice, confirming they can submit issues anytime with the detailed information agents need to expedite resolutions.

Business Impact

- Extends hours of operation
- Increases customer satisfaction
- Cuts call handling time
- Enables 24x7 support without staffing 24x7

Shared Incident Support

Tired of taking call after call for the same problem when a shared, or common, incident occurs? Voice self-service streamlines the processing of shared incidents by giving customers a way to log their issues without involving an agent.

When customers call, they are asked to choose whether they are calling about a new ticket or an existing one. If they choose a new issue and the issue type, voice self-service searches the system to see if an issue matches the customer's. If it finds a match, it reads back the description to the caller, then the caller can open a ticket on that issue. The system reads back a newly assigned ticket number to the caller.

Voice self-service solutions also let service desks alert a group of callers by phone automatically that their shared incident has been resolved. This capability is particularly valuable at times when multiple customers may be experiencing an issue that limits other self-service options, such as a network outage. They can still log the issue while agents focus on fixing the problem quickly.

Business Impact

- Reduces call queue volume
- Lessens the impact of spikes in call volume
- Resolves issues more quickly
- Increases customer communication and satisfaction
- Improves tracking of incident impacts

Emergency Notification

Effective emergency management depends on communication, often with a large number of people. Organizations need both outbound notification as well as a way to inform and process those calling in. Voice self-service solutions connected to service management systems can initiate outbound communications or process inbound calls, leaving a complete record of all interaction in the service management system.

Outbound

With voice self-service technology, an organization can record an outgoing message that is sent automatically to

specific groups. For example, if there's a power outage at a building during non-business hours, the system can notify all employees about the situation on their home and/or cell phones and let them know not to come into work. Because the system can be administered remotely, a staff member can initiate these outbound communications from the safety of home. When the issue is resolved, the organization can record and send an updated message letting staff know that the building has power again.

Organizations can leverage that same technology to reach large groups with non-emergency communications such as announcements about holiday hours or changes in payroll dates. Voice self-service can also be configured to call individuals with targeted messages, such as a reminder to complete healthcare annual enrollment forms.

Inbound

Voice self-service also gives organizations a more efficient way to communicate and process incoming calls. During a technical outage, for example, IT staff can record a message that lets callers know about the outage and when it is expected to be resolved. Callers can choose from automated options to indicate whether they are calling about the outage, in which case it is logged and grouped with all calls about that issue. When the outage is resolved, the system can call those individuals automatically to let them know it is fixed.

Customers wanting to talk with an agent can wait in a queue or leave a message. Just like live calls, the messages reach agents in the order in which they came in. With "screen pop" in voice self-service, agents see the customer's complete information right on the screen in front of them as they initiate the call back to the customer. Whether live callers or messages for call-back, those customer issues are served up one after another for agents to process—with complete information in front of them.

Business Impact

- Notifies internal or external customers about issues immediately and proactively
- Processes incoming calls more efficiently during high volumes

- Increases customer satisfaction with improved regular and emergency communication
- Escalates issues based on service level, importance, priority, urgency, and impact
- Documents and audits steps taken

ITIL® Change Management Support

Voice self-service goes beyond support incidents to help organizations pursue ITIL® best practices. For example, voice automation can expedite the creation of change records, as well as the change or service request approval process.

Users can simply pick up the phone to log incidents or change requests, which are then turned into actionable tickets. Those tickets move through the change process automatically as they are approved by those on the change board. If anyone involved in change approval happens to be out of the office, that individual can receive a message automatically regarding the change, and use the phone to approve the change in the system—ensuring that change requests move quickly and appropriately through the process even when people are out.

With a complete record of the change approval process in the service management solution, organizations have essential documentation for internal or external audits.

Business Impact

- Automates the complete change process
- Enables change approval by phone when approvers are out of the office
- Creates records for auditing purposes

Ivanti Voice Automation

Ivanti® Voice can be a key enabler for a cost-effective, customer-pleasing communications strategy. It lets you replace expensive and limited proprietary telephony hardware with standards-based software solutions that optimize equipment choices. It deploys rapidly, integrates seamlessly, and aligns easily with changing business processes, demand, and staffing. Many teams have increased service levels and productivity, while reducing costs.

Ivanti Voice is integrated with the Ivanti® Service Manager ITSM solution (formerly HEAT Service Management) to provide seamless information access, as well as automated workflows, leading to increased customer satisfaction and lower costs. This comprehensive business telephony solution can be implemented to handle the needs of an entire organization, campus, hospital, or district, or it can be deployed alongside existing systems to support a single department such as a help desk.

Learn More

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