

INSOURCE

Transforming Business Through Technology

How to Ensure Service Portal Adoption

Brian Treichel, Practice Director ITSM & Service Portal

November 15, 2018

Biography ~ Brian Treichel

Background

- Joined InSource in February 2015
- Over 75 Implementations
- Computer Science & Web Development Background



Certifications

- ITIL v3 Foundations
- ServiceNow Systems Administrator
- ServiceNow Implementation Specialist

Agenda

About InSource

- Offerings
- Partners & Our Clients

Service Portal Adoption

- Understanding Services
- Branding & Design
- Communication & Marketing Plan
- Governance

*Please use the Q&A area for any questions



2018 Partner Award

May 7-10, 2018 Las Vegas

Global PartnerNow® Summit

Congratulations!

INSOURCE

Highest Number of Deployments
Americas Services Partner

knowledge
2018

servicenow



InSource Offerings

- IT Service Management (ITSM)
- IT Operations Management (ITOM)
- Project & Portfolio Suite (ITBM)
- Customer Service Management (CSM)
- Security Operations
- Process Improvement Workshops
- ServiceNow Instance & Process Assessments
- Talent Acquisition
- Okta Partner



Notable Customers



Service Portal: What to consider when launching a portal?

- Understanding Services
- Branding and Design
- Communications & Marketing Plan
- Governance

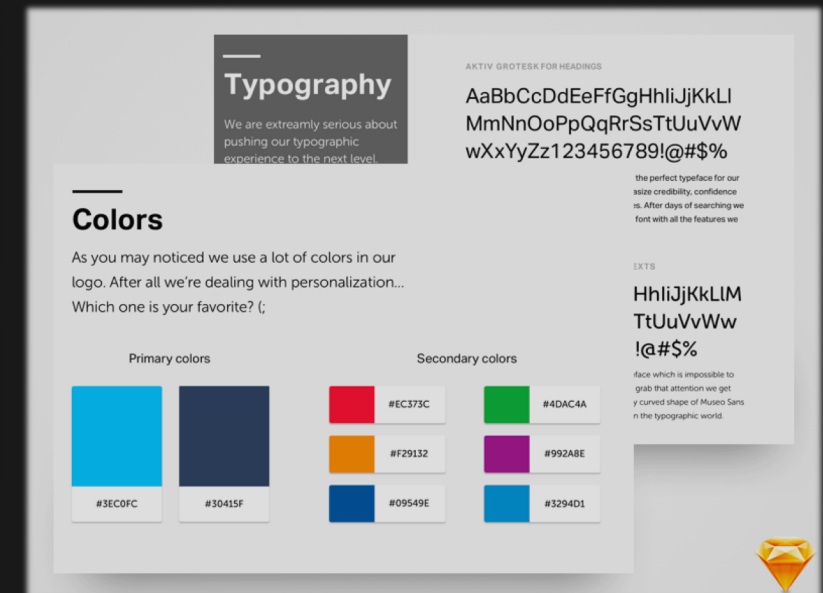
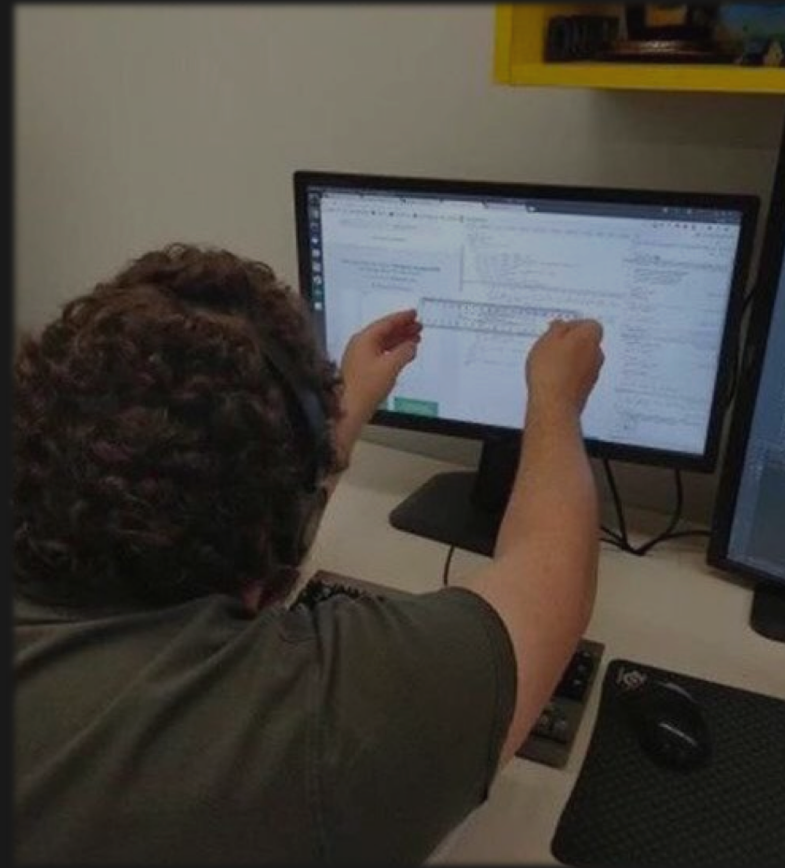
Understanding Services

- What services are important to your department
- What services are important to your users
- Focus groups
- Surveys
- Analytics & Usage



Branding & Design

- Don't let IT design
- Keep it simple
- Application naming
- Leverage Corporate Branding Documents
- Dedicated Design vs. Branding Application



Communications & Marketing Plan

- Email Blasts
- Flyers / Intranet
- Road Shows
- Phone Scripts
- Capabilities & How-To Videos

EquipIT Technology Self Service
Quick Start Guide. Access through EquipIT. .com and use this guide to learn the basics

EquipIT is a self-service technology portal. It is an online tool where you can get help, access knowledge base articles, and submit support tickets. EquipIT allows you get quick access to help, check ticket status, and more without calling the IT Service Desk.

Navigation
Quick access to the Knowledge Base, Service Catalog, My Items, System Status, and your profile.

Get to Other EquipIT Portals
Click here to see other EquipIT portals, like EquipAP (Accounts Payable).

Search Help
Search for help, access research, service catalog, or knowledge base. Type in a keyword to see results that match your search.

Get IT Help
Submit a ticket, make a request, report an issue or chat with a Service Desk Agent.

EquipIT Portal Help
Get help with navigating the EquipIT portal, access training and knowledge-base articles.

SCA Quick Links
Access important links like OSCAR, and more.

View Open Items
Check the status of open tickets or requests. Check the rules or post a question in your ticket.

Quick Links
Easy get to the most important and frequently used parts of the portal.

Password Self-Service
Enroll in password reset self-service, and security questions, and enroll a mobile device.

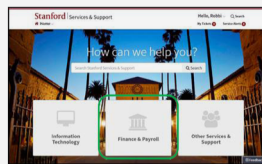
Yammer
View the EquipIT Yammer group feed. Quickly comment, like or post to Yammer from here.

EquipIT portal is mobile friendly!

Bulletin: New Help Ticket Portal for FMS Support Requests (Posted January 22, 2018)

As part of University IT's campus-wide initiative to move to a single, state-of-the-art service management system, Financial Management Services (FMS) will migrate from the HelpSU ticket portal to Stanford Services & Support (powered by ServiceNow). You may be familiar with the new system as University IT has been using it for IIT support services since December of 2016. Stanford Services & Support's up-to-date technology brings a more user-friendly web-based portal, a much improved mobile device interface, and a more flexible service request workflow.

Starting January 29th, select Finance & Payroll to pick from a menu of support request forms specific to financial and payroll inquiries, ensuring fast routing of your ticket to the specialists that can best assist you.



And remember, there are three ways to reach the specialists in the FMS Financial Support Center:

- Call us directly at 650-723-2772 for immediate support
- Send us an email at finhelp@stanford.edu
- Submit a support request by logging into <http://services.stanford.edu> (available January 29, 2018)

For a quick overview of Stanford Services & Support portal and a preview of the new Finance & Payroll domain, view these videos:

- Overview: Stanford Services & Support (1:41)
- Stanford Services & Support: Finance and Payroll (1:23)

It's our pleasure to assist you!

Emory's IT Self Service Portal gets major facelift
By Wade Morlice | Emory Report | Feb. 13, 2017

The upgraded IT Self Service Portal provides an interactive customer experience. Users can easily open tickets to report problems, search for knowledge articles to help resolve IT issues, and find items in the request catalog.

The upgrade provides an interactive customer experience for those needing IT information or help from IT support staff. With the IT Self Service Portal, users can easily open tickets to report problems, search for knowledge articles to help quickly resolve IT issues, and find items in the request catalog. Customers will also be able to view their open incidents and request items, as well as see system status details for major IT-related incidents.

The project, which began in November 2016, allows Emory to take advantage of a more modern user experience, previously unavailable due to the large-scale customizations of LTS' original software. The Service Management team (ITSMO), with support from the Emory community, led the upgrade effort to migrate Emory's IT service modules to a more out-of-the-box configuration. This configuration enables the platform to be nimble and take advantage of future enhancements.

"The upgrade sets the stage for future releases so we can stay up to date with the latest functionality," says Siram Char, director of LTS Middleware Services. "We believe this change gives us the opportunity to improve our collaboration with the Emory community."

The change evolved from Emory's role as an early adopter of the IT service software called

IT SERVICES
ABOUT SERVICES TRAINING SECURITY SOFTWARE & HARDWARE RESOURCES PROJECTS CONTACT

Introduction to the University Service Portal

IT Services is enhancing our online service portal for reporting issues and requesting services.

You can find the new Service Portal by clicking the "Request Help" link on the IT Service website (<http://www.csls.csls.edu>) or by visiting <https://sls.csls.csls.edu/new-portal/>. The new portal looks like this:

Request Help
If something you currently have is no longer working or not working as expected, select the "Need Help?" link.

Request a Service
If you need something new or changed, select the "Request a Service" link.

Knowledge Base
If you are looking for information on how to do something, search our knowledge base that contains articles and tips & tricks.

A message board where the IITs user community can ask and answer questions.

My Requests
A list of your open requests submitted via the service portal.

What's New in IS&T

[Back to News & Events List](#)

IS&T Solution Center Self-Service Portal Update in December will Enhance Functionality
12/05/17

On Saturday, Dec. 16, at approximately 8 a.m., the IS&T Solution Center's Self-Service Portal will be updated to enhance a number of functionalities that will make common activities easier to complete. IS&T teams have been preparing the updates for months and recently held a small discussion group to review and provide feedback about the changes. Reactions were overwhelmingly positive, with participants providing valuable input about changes they would like to see in the future as well.

Enhanced functionalities in the updated Self-Service Portal will include:

- Ability for Center City and Methodist staff to use the Self-Service catalog and request many different types of IS&T services -
 - Hardware, such as desktops, laptops, cables and accessories
 - Account access for new and existing employees, as well as consultants and vendors
- Improved functionality for submitting, tracking and checking status of requests
- Consolidated information in one location
- Improved email alerts and status updates when requests are submitted, worked and resolved

The updated Self-Service Portal will also feature a refreshed look and feel, shown above.

These changes mark the first substantial updates to the Self-Service Portal since it was launched more than a year ago. The Dec. 16 updates are only the first step in a series of improvements, with teams continuing to work on additional enhancements and features that will be rolled out in the future.

Governance

- News, Outages, Events
- Knowledge/Service Catalog Content
- Marketing Upkeep
- Metrics

Notification banner: Email server down. We are aware of the issue and are taking steps to correct it. 1 of 2

Navigation bar: serviceNow Knowledge Service Catalog Requests 1 System Status Cart

Comments

Joe Employee - 2m ago - ★☆☆☆☆
This article did not help at all!

Bob Smith - just now - ★★★★★
Calling the Help Desk is so much easier...

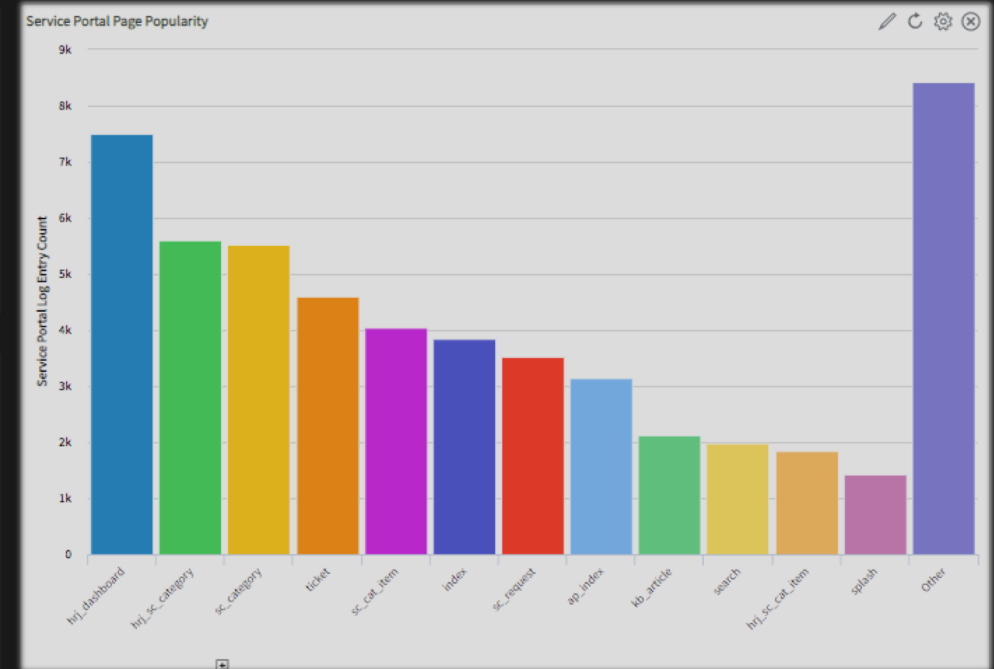
Helpdesk Satisfaction Survey

Helpdesk Satisfaction Survey (Template: Image Scale)

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
How satisfied are you with the Attitude of the support employee?	☹️	😞	😐	😊	😄
How satisfied are you with the response time to your incident?	☹️	😞	😐	😊	😄
How satisfied are you with the technical competency of the technician serving you?	☹️	😞	😐	😊	😄
How satisfied are you with your overall service experience?	☹️	😞	😐	😊	😄

Tell us what you think about IT and what you want or need.

Cancel Save Submit



Portal Adoption - Recap

1. Understanding Services
 - Understand Efficiencies
 - Understand User Expectations
 - Alignment
2. Branding & Design
 - Highlight Important Services
 - Keep it Simple
 - Make it Comfortable
3. Communications & Marketing Plan
 - Emails, Flyers, Intranet
 - Road Shows
 - Help Videos & Articles
4. Governance
 - Determine Roles and Responsibilities
 - Review Feedback and Usage
 - Grow with your Services



How can InSource help?

- RoadMapping
- Health Assessments
- Process Consulting with industry experts
- Implementation
- Custom Training
- Licensing
- And much more!



Questions?

Feel free to contact us:

Product & Capabilities:

Brian.Treichel@insourcenow.com

Sales & Licensing:

ServiceNowWebinar@insourcenow.com



A woman in a black tank top and light-colored shorts stands on the peak of a large, reddish-brown rock formation. Her arms are raised in a celebratory gesture. The background is a bright blue sky with wispy white clouds. The foreground shows more of the rugged, layered rock formations.

**Join us for our next
webinar!**

**ServiceNow Strategies to
Improve CMDB Data
Quality**

December 6th, 2018

2:00 pm - 3:00 pm



Thank You!