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Automation, Service Desk and Zero Touch resolutions

Automation and Zero Touch resolutions are big buzz words. But what do they mean? Why would you do it? And is it even possible?

Automation and Zero Touch resolutions are two of the biggest buzz words used in the past year in the ITSM world. Everyone has started to talk about them, but what do they mean, why would you do them, and are they even possible?

We certainly think it's a big thing to help us provide an even better service!

About a year ago I joined our Remote Services team on a part time basis from our software team. Let me share the story of how we developed automation and zero touch resolution to help our customers at Waterstons.

Automation

Firstly, let's focus on automation – if we look up its definition, it means: "performs tasks that were previously performed by humans". Sounds a bit sci-fi? But it's very much possible!

So, can we automate EVERYTHING?

Well, the short answer is no – we'll still need humans for some decision making and just because we can automate something, doesn't mean we *should*.

That said, we can automate any process that has set boundaries around it – anything that follows a flow chart. Sounds simple?

Let's take an example - a New Employee Account process – simple on paper but once you start to scratch the surface, it can get very complex, very quickly – how do you decide what permission groups you grant the user? Is it based on knowledge such as their job title and location? Or is it based on a matrix of roles vs location?

We must make a judgement call about whether to automate a process and how far to go with it – otherwise you'll end up spending so much time automating, the time saved will never pay for the cost of the automation in the first place.

Start by picking your quick wins – simple tasks which are run many times. Watch out for dull, time consuming processes – they are often favourites to automate but if they only actually get run twice a year then it won't be worth the effort. Also, only pick tasks which rarely change – otherwise you'll end up spending the time tweaking your automation rather than doing the task.

It's important to identify good candidates for automation early to avoid frustrations and taking on mission impossible.

Why automate?

There are so many simple requests which can make life better if they are automated (for both the person asking for help and us!) – everyone is busy and doesn't want to give up 30 minutes to let someone do something on their computer.

Imagine if you could just visit a self-service portal and request that your hard drive is cleared of temporary files; any time of the day, click a button and it just happens. Taking into consideration the current pandemic work patterns, childcare, flexible working around shopping, caring for family members and so on – this is just the sort of thing we need.

People are empowered to solve the issue when they want, without disruption, and our teams are free to deal with more challenging issues or improvements – far better value for us all.

Zero Touch Resolutions

So now, what do we mean by Zero Touch? Zero Touch means that our users can go and use services without a 'human' service desk agent needing to fulfil them. Sound scary? We are trusting the technology and empowering the person who needs help. Of course, it needs to be reliable; if it fails, it will need a human to intervene.

Ok, so how do we do it?

There are many ways to automate but you need three things:

- A way for people to access the service– A portal, a chat bot, or even a call centre phone system. Something that can take someone's request, ask the right questions, and pass it on.
- An execution engine – The glue between your portal and the script to do the task – it tells your systems to run the automated task with the information provided – this might be a remote management tool, an orchestrator tool, or even a basic task scheduler.
- The automated task itself - Written out and scripted in a way which our execution engine can run.

We use FreshService as our self-service portal, and we plug it into our 'MindIT' platform which most of our clients use in some way. This means we can automate most of our tasks relatively easily (and cheaply).

If you wanted to request something we'd automated, all you'd have to do is access your self-service portal, find the relevant request and enter the necessary information. This creates a ticket, and tells MindIT to run the script, which makes the changes, and closes our ticket once complete.

We've used this approach to let architects restart a license server – sounds simple but this keeps them working without having to call us or wait for someone to pick up a ticket.

We've also used it to automate permissions management on a file share which holds sensitive information – this saves us time but also eliminates the risk of human error causing someone to have the wrong permissions.

How far can you take it?

You can automate small tasks that are time consuming as I mentioned, but also big tasks. Imagine being able to spin up new servers in the cloud because your company keeps opening new offices -such as construction sites, they come and go all the time. You could then further build on this to automate back-office processes around these activities to further free up time for other departments such as HR, purchasing and finance.

For us, it gives the people we work for control over simple requests, which are delivered much faster, whenever they want, without needing to speak to anyone. Our teams spend less time doing those mundane tasks, and that frees them up to focus on the stuff that they are really needed for. We are starting to work in a way where automation is mentioned daily, and the team are starting to reap the benefits that extra time gives them.

So there you go – automation – it is a buzzword, but for good reason. We're looking forward to exploring how it can make life better for all of us.