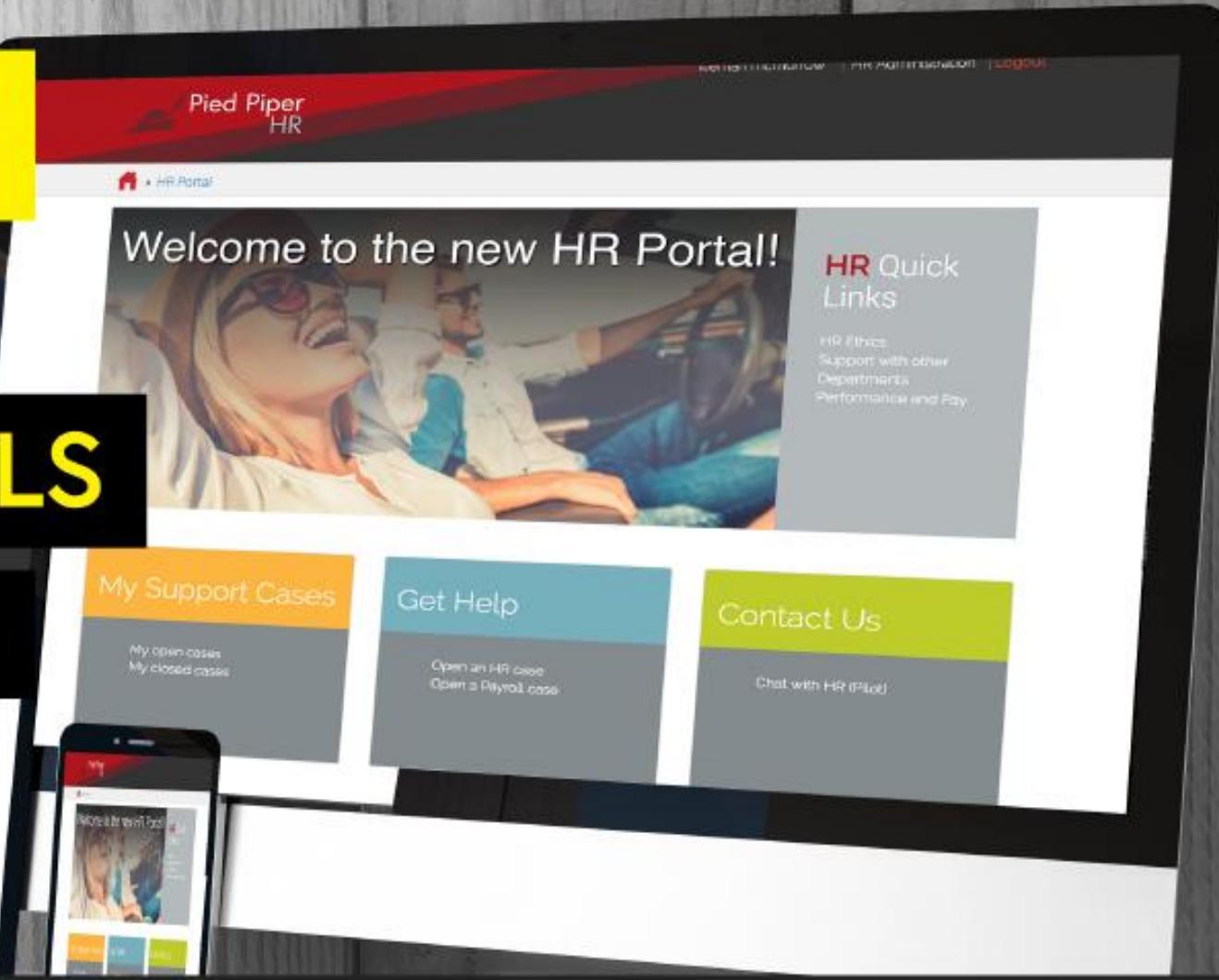


5 ESSENTIALS

ALL GREAT

SERVICE PORTALS

HAVE IN COMMON



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email: info@cernasolutions.com

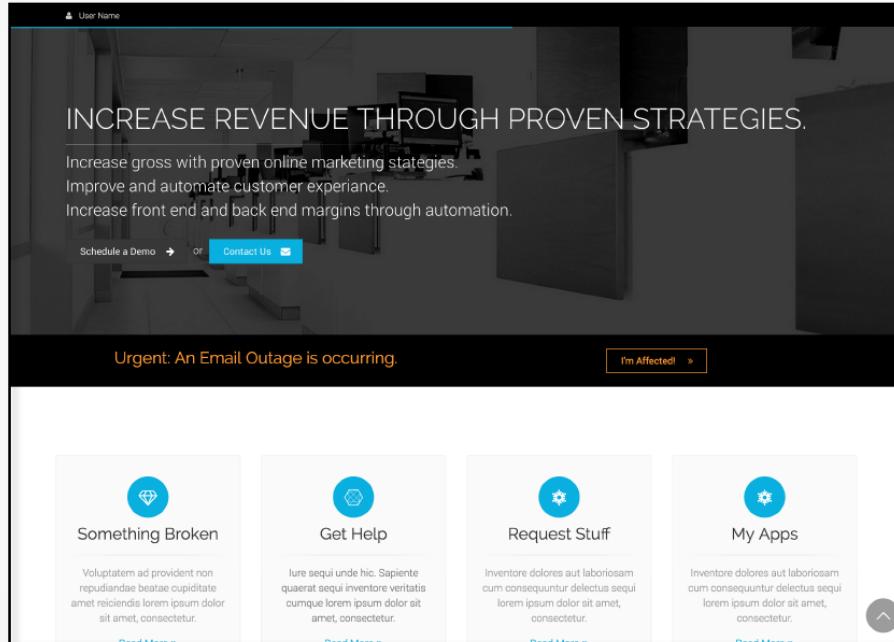
Presented by: Jeff Pierce
Portal Practice Manager
September 7, 2017

Introduction

Cerna Solutions specializes in ServiceNow consulting, implementations, integrations, and unique product offerings. We focus in service portal consulting, test management services and solutions, and remote administrative services.



service portal consulting by cerna solutions



- Over 7 years of experience building custom employee portals
- Expert solutions, including:
 - Single or Multiple Service Desks
 - Incident Deflection with Knowledge Base
 - Optimized Mobile Portals
 - Asset Based Self-Service
- Focus on transform Service Management for ALL users
- **FREE SERVICE PORTAL WORKSHOP**

Introduction

Jeff Pierce

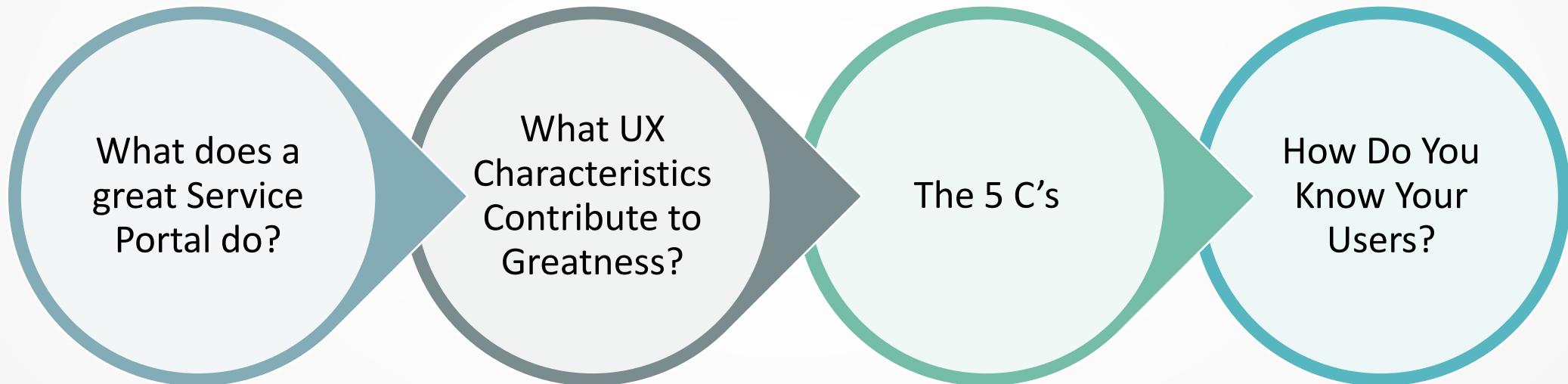
Portal Practice Manager

jeff.pierce@cernasolutions.com

- Seven years of ServiceNow portal & platform experience
- UX designer
- Ukulele & SCUBA enthusiast



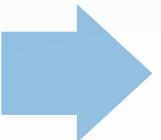
today's agenda



what does a **great service portal** do?



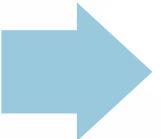
Fulfils a business goal



Saves service desks money



Has a comprehensible interface



Increases productivity



Gives users a positive emotional experience



Creates confidence in support

A blurred background image showing a person's hands interacting with a laptop and a white computer mouse on a wooden desk. Large, semi-transparent white speech bubbles are scattered across the top right of the image.

What UX Characteristics Contribute to Greatness?



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what UX characteristics contribute to greatness?

Consistency



“I know what to expect.”

Conversation



“I can understand this.”

Culture



“This was built for me.”

Concision



“I can quickly find what I’m looking for.”

Clairvoyance



“I like how intuitive this is.”

Consistency

I know what to expect.

- Consistent style and location of elements develops intuition.
- Controls that look similar are expected to function in the same way.
- A user's knowledge of previous experiences can be leveraged.
- Content should be consistently distinctive.

Breadcrumbs

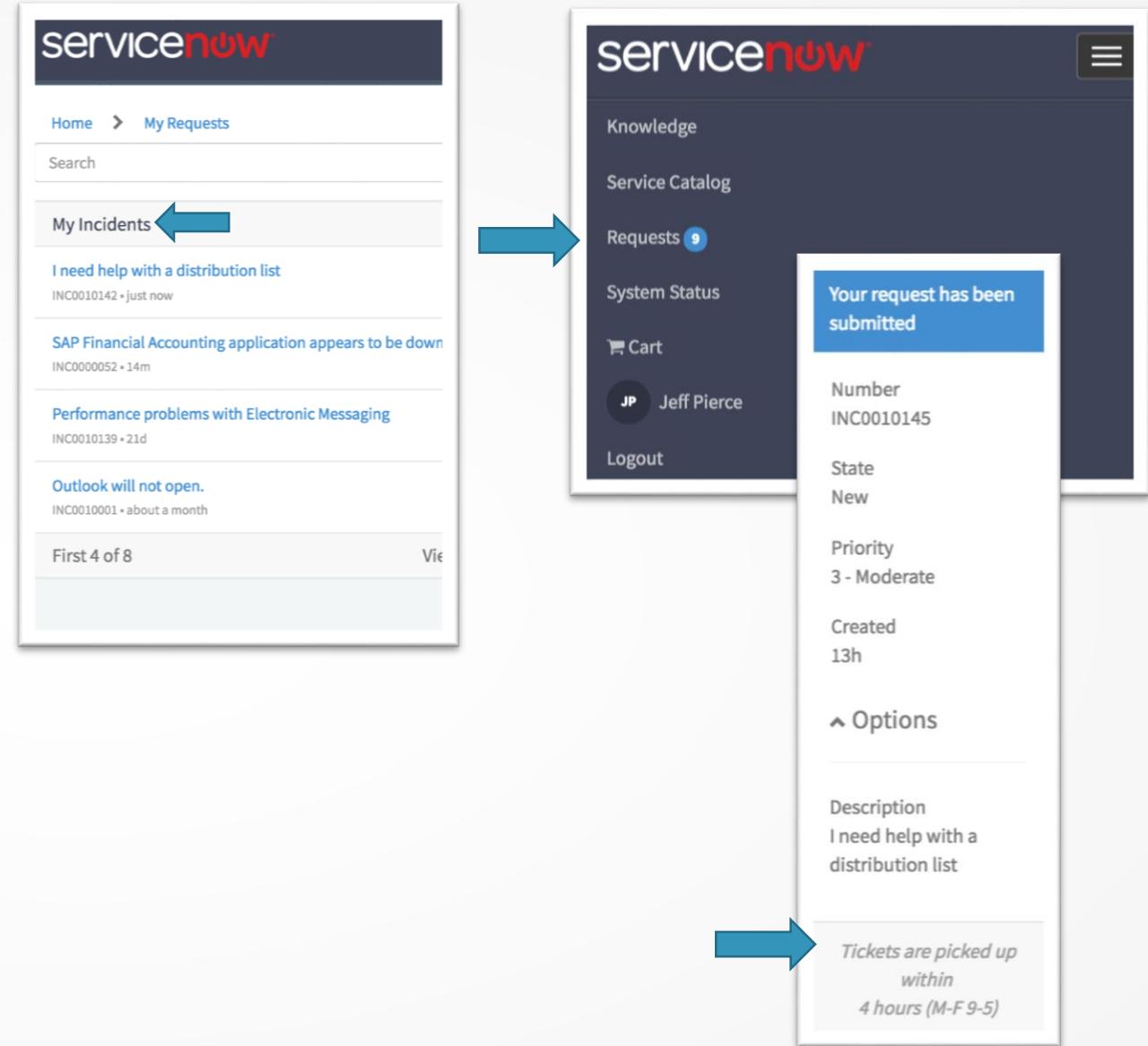
- Every page should have a breadcrumb trail leading back to the beginning.
- If I have breadcrumbs when browsing to a KB article, I would expect to see breadcrumbs when I view the article.

The screenshot shows a ServiceNow Knowledge Base interface. At the top, there's a navigation bar with 'service' and 'now' in red. Below it, a breadcrumb trail reads 'Home > Knowledge Base > Applications'. A search bar is present. On the left, a sidebar titled 'KB Categories' lists several categories with counts: News (5), Applications (2), Devices (1), IT (7), Email (8), Suppliers (1), and Operating Systems (12). The main content area displays a list of articles under 'Applications'. One article is fully visible: 'Managing Settings in Internet Explorer 10 for Windows 8' by Boris Catino, with 3 views and 8 months ago. Below the article, a summary states: 'Learn to set up a home page, connection settings, and parental control in Internet Explorer.'

This screenshot shows a ServiceNow Knowledge Base article page. The breadcrumb trail at the top is identical to the one in the previous screenshot. The main content area displays the article 'Managing Settings in Internet Explorer 10 for Windows 8' by Wayne Webb, with 3 views and 8 months ago. The summary for the article is: 'Learn to set up a home page, connection settings, and parental control in Internet Explorer.'

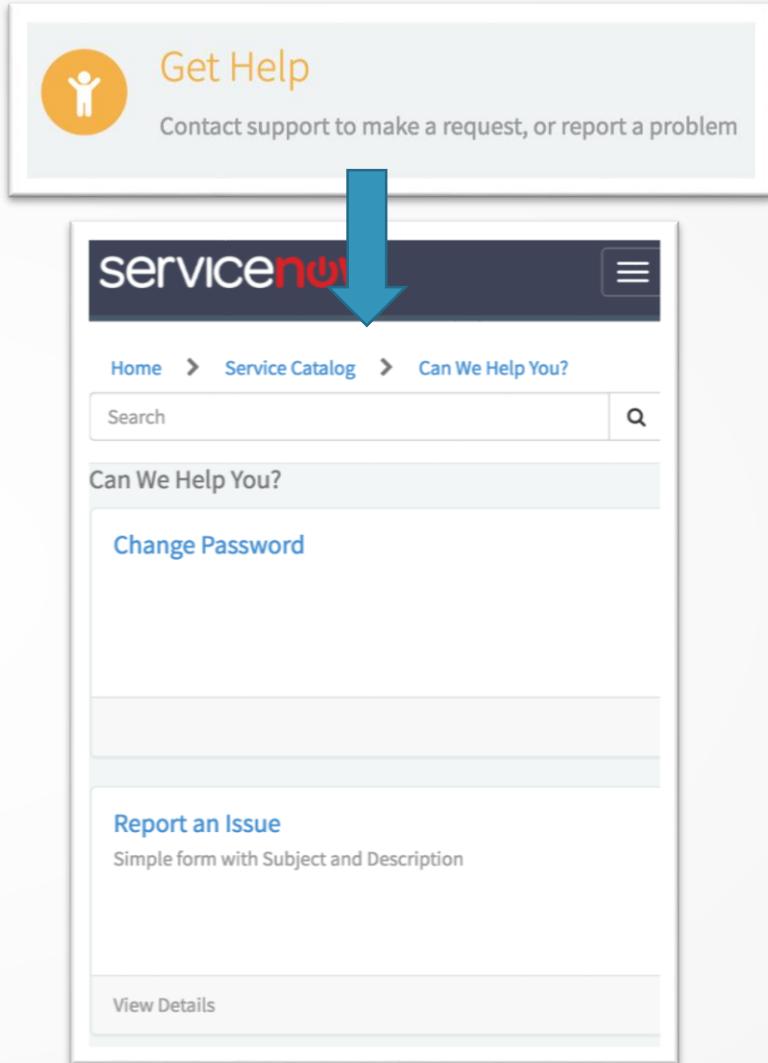
Labels

- A very common source of confusion is lack of consistency among labels.
- In this example, the user will remember the label ‘My Incidents’, but on their next visit they will only find a link to ‘Requests’.
- The top level label should be something more general and encompassing.



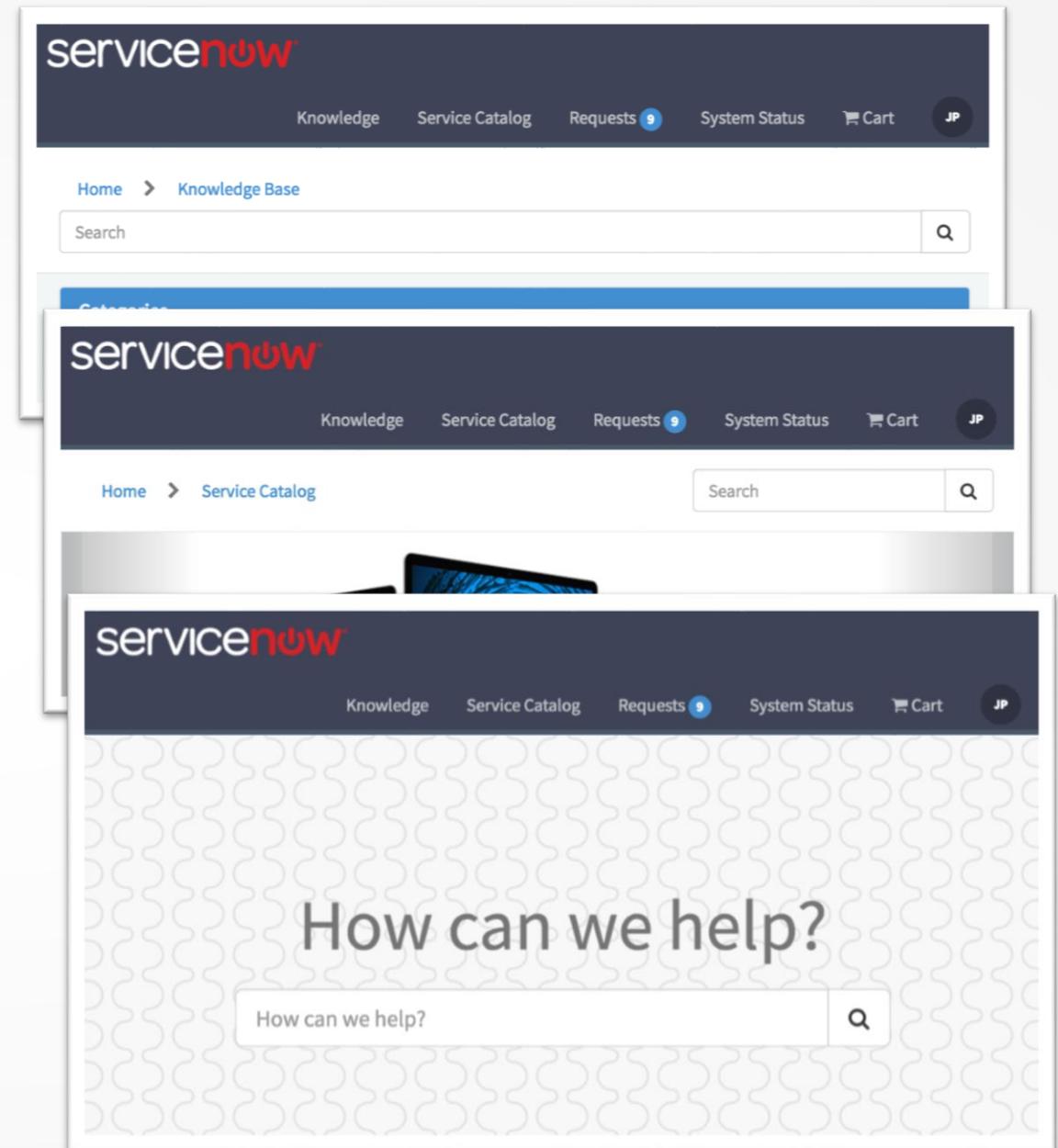
Labels (more)

- The labeling of a link should give the user a clear expectation of what to find on the other side.
- In this example, the link description and the labels on the subsequent page provide a very inconsistent experience.
- The user may be wondering if they clicked on the right link at all.



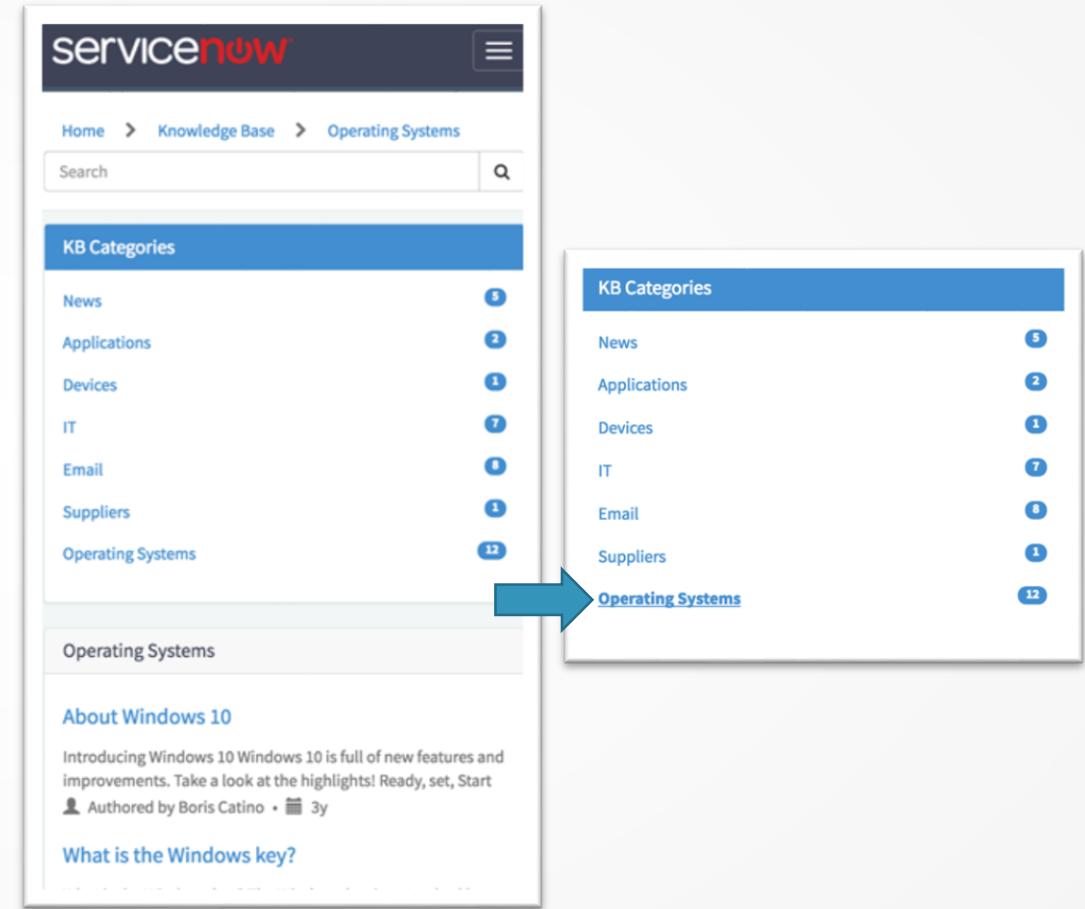
Search Inputs

- Search inputs that search the same sources should have consistent placement and placeholder text.
- Any search inputs that look similar should always search the same sources.



Consistent Distinction

- Consistent distinction, or lack of ambiguity, creates confidence.
- It can come in the form of visual feedback, as a response to selections and navigation.
- Users may not notice the breadcrumbs change. Furthermore, if the list of categories were longer, the user would never even see a change in the list of articles.
- Wouldn't it be nice if when I click on a category I received a visual cue of my selection?



Consistent Distinction

- Too much of the same becomes a boring blur. The average user won't take the time to read through these lists.
- With a little touch of color and some helpful section titles, users can easily distinguish between these lists.
- Note how the colors and order of the lists correspond to the respective links directly above them.

The screenshot shows a user interface with a light gray background. At the top left is a box labeled 'Current Status' containing the text 'No system is reporting an issue'. Below it is a box labeled 'News' containing several news items: 'Company holiday next week' (7mo ago), 'New portal launching soon with Service Portal' (7mo ago), 'Lorem ipsum dolor sit amet, consectetur adipiscing.' (7mo ago), and 'Reached number 1 on Forbes 500 list' (7mo ago). To the right of these are three columns: 'My Subscribed Questions' (listing 'Is Microsoft 365 the greatest or what?' by Jeff Pierce), 'My Approvals' (listing 'You have no pending approvals'), and 'My Open Incidents' (listing 'My email inbox isn't getting new mail' and 'I need help with a distribution list').

This screenshot shows a similar user interface but with a more organized and color-coded layout. At the top are four links: 'Order Something' (blue), 'Knowledge Base' (green), 'Get Help' (orange), and 'Community' (red). Below these are three main colored sections: 'Status and News' (green), 'My Stuff' (orange), and 'Community Questions' (red). Each section contains a list of items, such as 'Current Status' (No system is reporting an issue), 'News' (Company holiday next week, New portal launching soon with Service Portal, etc.), 'My Approvals' (You have no pending approvals), 'My Open Incidents' (My email inbox isn't getting new mail, I need help with a distribution list), 'Popular Questions' (Is Microsoft 365 the greatest or what?), and 'Community Questions' (My Subscribed Questions).

CONVERSATION

I can understand this.

- People respond best to warm language, in a recognizable vernacular.
- Engaging language creates more understanding.
- If nothing else, conversational language provides a better experience.

Search Inputs

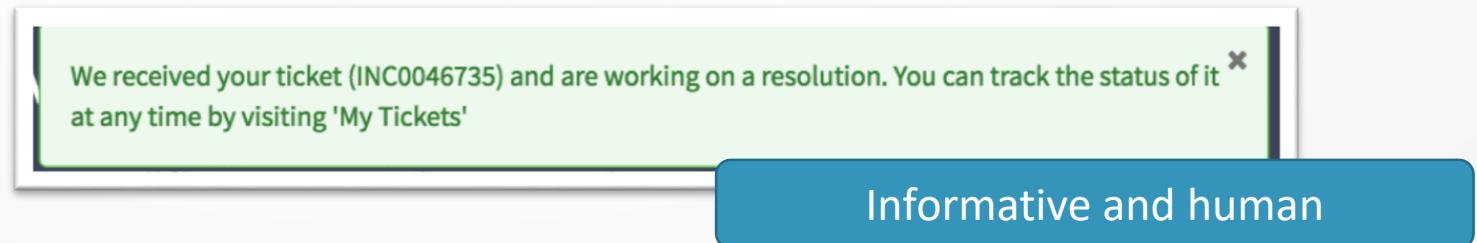
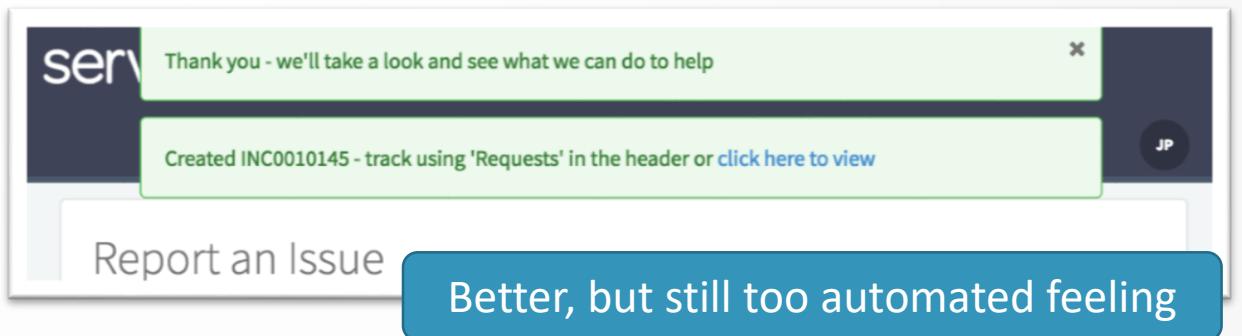
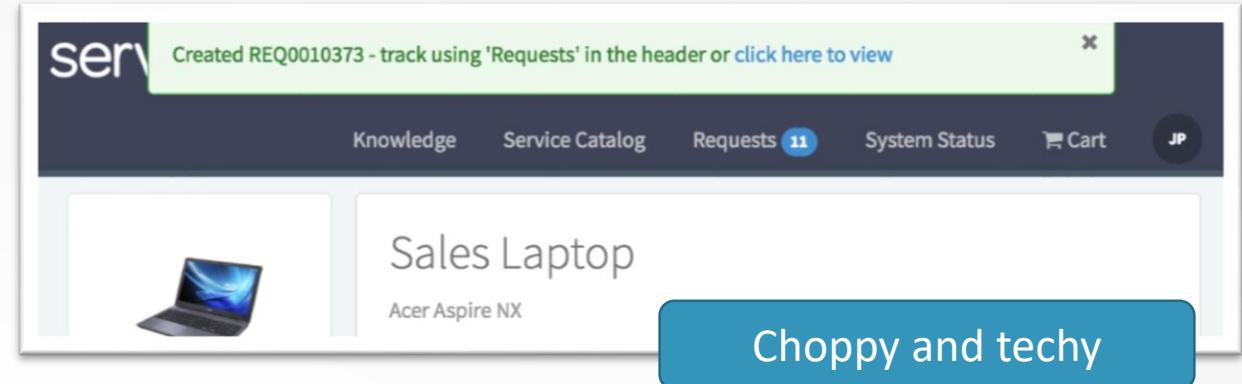
- Use plain, descriptive language to let users know what they are searching.
- Vague labels leave a lot of uncertainty.

The screenshot shows the ServiceNow Knowledge Base interface. At the top, there's a dark header with the ServiceNow logo and navigation links: Knowledge, Service Catalog, Requests (9), System Status, Cart, and a user icon. Below the header, the breadcrumb navigation shows Home > Knowledge Base. A search bar is present with a magnifying glass icon. A blue callout box labeled "Vague and empty" points to the search bar area. The main content area has a heading "Categories" and a large, faint watermark-like text "How can we help?".

This screenshot shows the same ServiceNow Knowledge Base interface as the previous one, but with a different search input. The search bar contains the descriptive text "Search for services and answers". A blue callout box labeled "Descriptive and helpful" points to this improved search input. The rest of the interface, including the watermark text, remains the same.

Confirmations

- Close the service loop with a happy, confident feeling.
- Let the user know that you care.
- Let the user know 'what next'.



Form Labels

- You have plenty of room on a form.
Why not use it?
- If you were being asked these
questions by a human, how would
you feel?

Caller

- or -

Who is experiencing the issue?

It might be me, might
be someone else...

Form Labels

- You have plenty of room on a form.
Why not use it?
- If you were being asked these
questions by a human, how would
you feel?

Description

- or -

What seems to be the issue?

Are you getting any error messages? What browser and
operating system are you using?

Help the user help you.

Form Labels

- You have plenty of room on a form.
Why not use it?
- If you were being asked these
questions by a human, how would
you feel?

Impact

- Low
- Medium
- High

- or -

Who does this affect, as far as you know?

- Just me
- Several of us
- Everyone

Don't ask them to classify the
incident. Ask them for information.

Form Labels

- You have plenty of room on a form.
Why not use it?
- If you were being asked these
questions by a human, how would
you feel?

Urgency

- Low
- Medium
- High

- or -

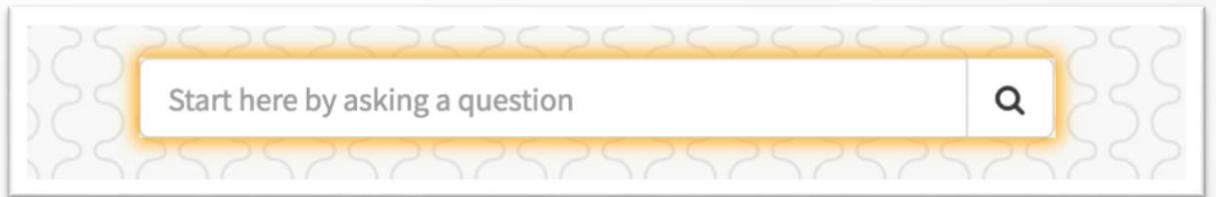
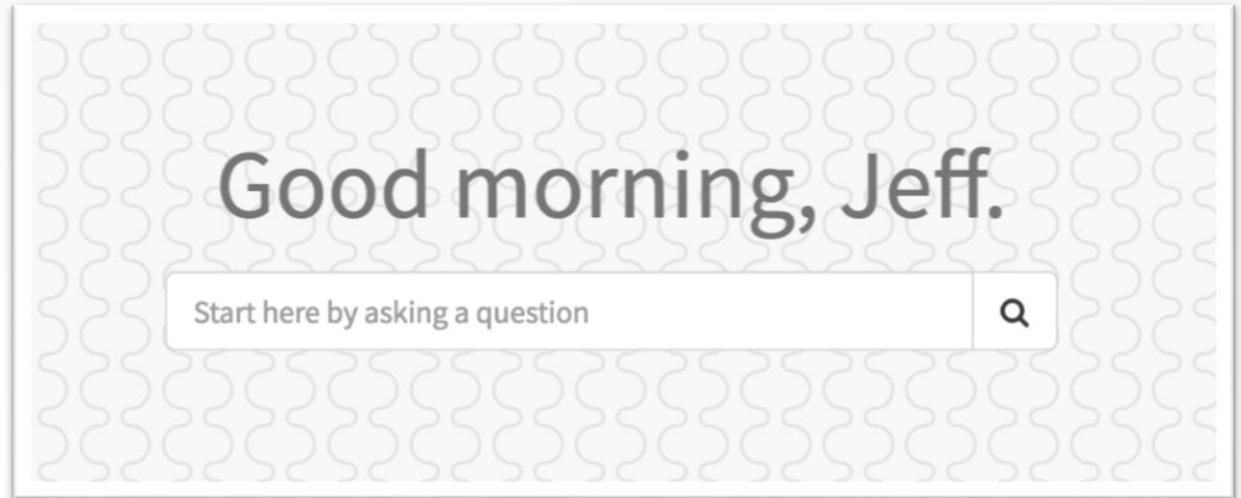
How is your productivity affected?

- It's not
- Somewhat
- I can't do my job

Ask questions they know
how to answer.

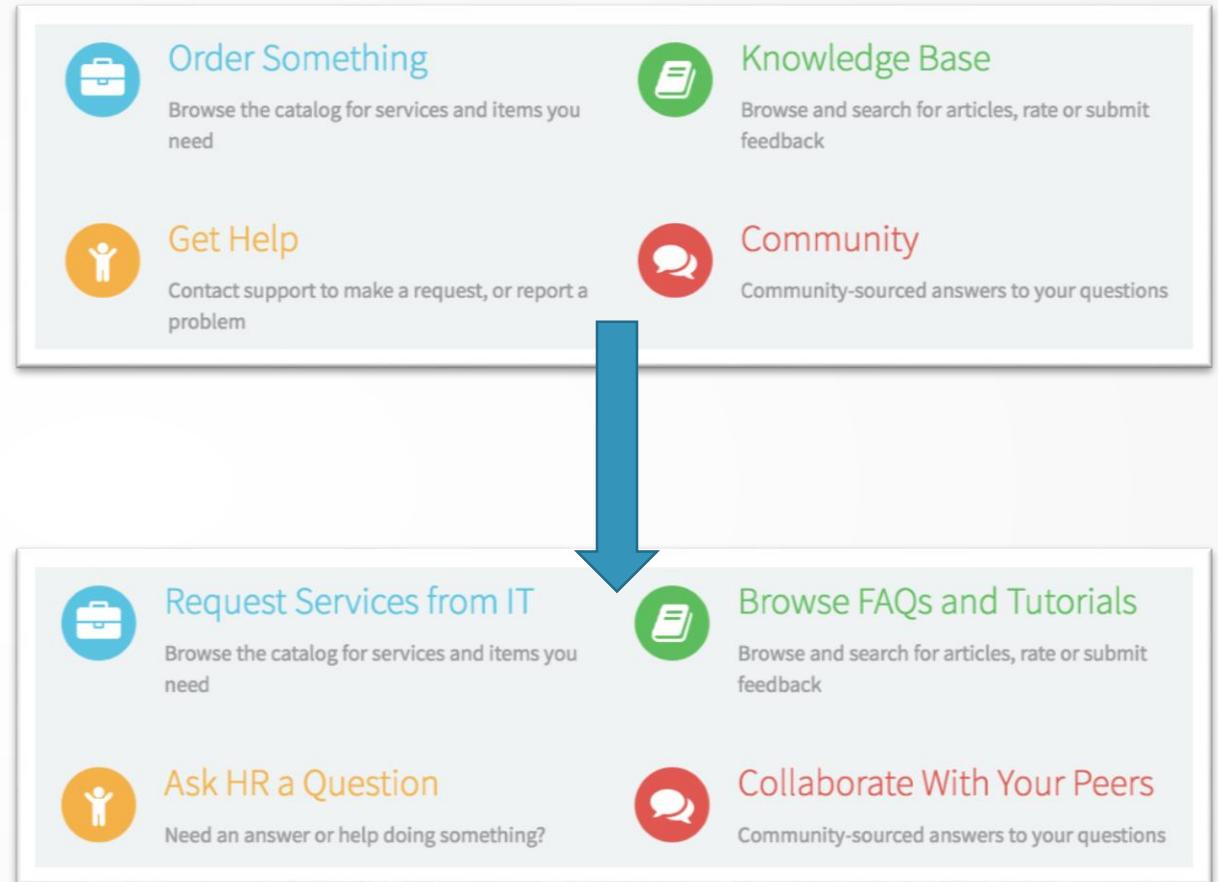
Homepage

- Welcome them by name.
- Let them know where to start.
- You can even give them a hint by flashing an element.



Navigation

- Get more conversational with link labels.
- Use engaging language.
- Get descriptive and friendly.



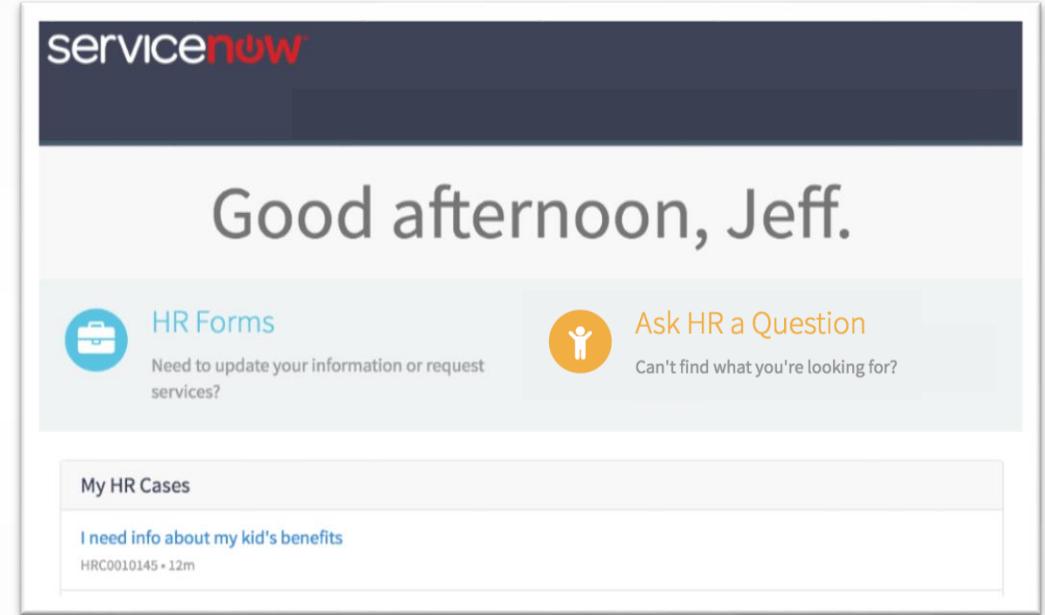
CULTURAL

This was built for me.

- Would a particular style of navigation be harder for some users than others?
- Are you using any terms or jargon that would not make sense to some users?
- Is the information you are presenting relevant to the way users from different departments, fields, and roles make decisions?

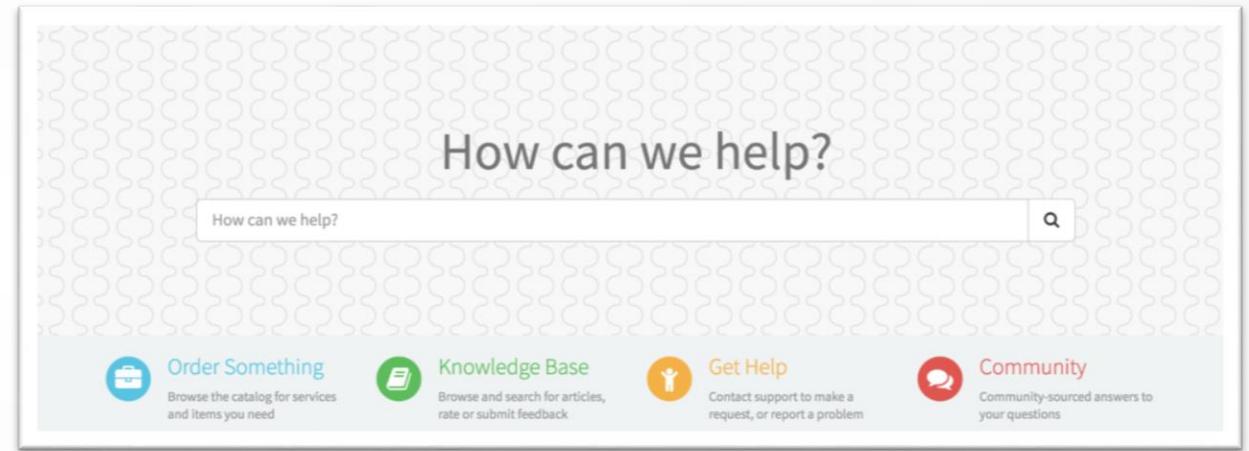
Navigation

- Are you experiencing high call volume from a low-tech audience? Then focusing on search may not be appropriate. Users may respond better to a small number of focused options.



Navigation

- Are your users comfortable with searching for information? Are they familiar with your offerings? Perhaps a larger focus on search and browsing is the way to go.



Terminology

- Do your users know or even care about ITIL terms?
- Consider familiar, umbrella-like language.
- Incident, Request, Case
 - Ticket
- Knowledge Base
 - Help Articles
 - Information
 - Policies & FAQs
- Service Catalog
 - Requests
 - Services
 - Equipment
 - Forms

Appropriate Info

- Are you inviting confusion with more information than is necessary?
- Do the state, priority, and SLA info help or complicate?
- Is there a friendlier way of presenting these details?

The screenshot shows a user interface for submitting a request. At the top right, a blue bar displays the message "Your request has been submitted". Below this, the ticket details are listed:

Number	State
INC0010145	New
Priority	Created
3 - Moderate	16h
Updated	
3h	

Below the ticket details is a section titled "Options" with a downward arrow icon.

The "Description" field contains the text: "I need help with a distribution list".

A note below the description states: "Tickets are picked up within 4 hours (M-F 9-5)".

At the bottom of the interface are two sections: "Location" and "Attachments". The "Location" section includes a globe icon and a large empty input area. The "Attachments" section includes a paperclip icon and a placeholder text "Drop files here".

Tips for understanding the culture of your organization

- **Power Distance (PD)**
The extent to which members understand the distribution of power.
- **Femininity vs. Masculinity (MAS)**
The distribution of emotional roles across groups.
- **Long-Term vs. Short-Term Orientation (LTO)**
The time horizon of the org.
- **Collectivism vs. Individualism (IDV)**
The degree to which individuals are integrated into groups.
- **Uncertainty Avoidance (UA)**
The degree of tolerance for ambiguity.
- **Indulgence vs. Restraint (IND)**
The extent to which the org suppresses gratification.

Or you can simply ask your users what they value in a support tool.

- Why would you call or email the service desk rather than use a self-service tool?
- What websites do you use on a regular basis? What do you like about them?
- What would you like to see in a self-service tool?

CONCISION

I can quickly find what I'm looking for.

- **Focus on Critical Use Cases**
- **Less Text**
- **Use of White Space**
- **Clear Navigation without Redundancy**

List Fatigue

- Users will lose interest if forced to wade through too much content.
- If a piece of content is not most useful to most users, then move it off the front page.

The screenshot shows a complex user interface with multiple sections:

- Current Status:** A green box stating "No system is reporting an issue".
- My Subscribed Questions:** A list of questions:
 - Is Microsoft 365 the greatest or what? (posted 0 days ago by Jeff Pierce)
 - When will Jeff Weiner's chariot come? (posted 0 days ago by Jeff Pierce)
- My Approvals:** A message: "You have no pending approvals".
- My Open Incidents:** A list of incidents:
 - I need help with a distribution list (INC0010145 - about an hour ago)
 - Help please (INC0010147 - 14 hours ago)
 - I need help (INC0010146 - 14 hours ago)
 - My email inbox isn't getting new mail (INC0010143 - 14 days ago)
 - I need help with a distribution list (INC0010142 - 14 days ago)
 - Performance problems with Electronic Messaging (INC0010141 - 1 month ago)
 - An application Blackberry beginning 06-16 15:41:44 (INC0010139 - 5 months ago)
 - I need help (INC0010136 - 3 months ago)
- News:** A list of news items:
 - Company holiday next week (posted 7 months ago)
 - New portal launching soon with Service Portal (posted 7 months ago)
 - Lorem ipsum dolor sit amet, consectetur adipiscing. (posted 7 months ago)
 - Reached number 1 on Forbes 500 list (posted 7 months ago)
 - Company voted best place to work (posted 7 months ago)
- Popular Questions:** A list of questions:
 - Is Microsoft 365 the greatest or what? (posted by Jeff Pierce 3 months ago)
 - When will Jeff Weiner's chariot come? (posted by Jeff Pierce 3 months ago)
- Top Rated Articles:** A list of articles:
 - Getting Around in Windows (5 stars)
 - What is a cookie? (4 stars)

A blue callout box in the center-right area contains the text "Information Overload!".

Text & Field Fatigue

- Blocks of text get ignored.
- Break useful information up and strategically place them.
- Every additional field needs to be critically justified.

Report an Issue
Simple form with Subject and Description

What's wrong? We'll help put it right if we can.
If you want to report that something you were previously using now no longer works or has developed a fault (such as an application, internet connection, email, telephone etc) you're in the right place. If your request relates to something you wish to obtain, get access to or change, submit a Service Request through the catalog.

Typical incident notifications:

- My work computer/application won't start/launch
- The network/telephone line seems to be down
- I can't access my email/file server/printer

Description

Additional Information

Submit

Report an Issue to IT

What seems to be the issue?

Are you getting any error messages? What browser and operating system are you using?

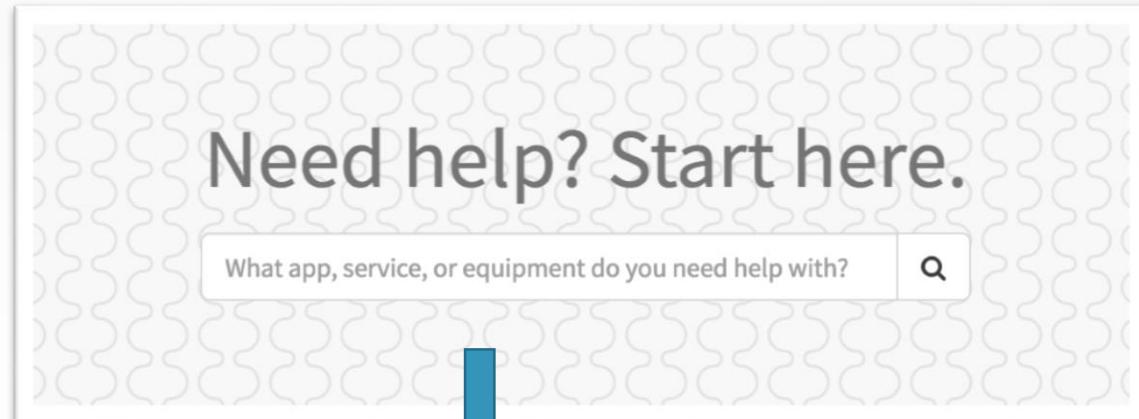
Submit

 Add attachments

Could be this simple

Consolidation

- Knowledge Base and Incident Submission could theoretically be consolidated into one experience.

A screenshot of a knowledge base or ticketing system interface. At the top, the text "Need help? Start here." is displayed. Below it is a search bar with a magnifying glass icon. The main area shows a "distribution list" with three items:

- [Create And Edit A Contact Group](#) (highlighted in blue)
- [Eclipse configuration for Android development](#)
- [Can't find what you're looking for? Open a ticket.](#)

A blue arrow points upwards from the distribution list towards the "Need help? Start here." text at the top of the page.

Menu Redundancy

- If you have a good landing page, do you really need a dropdown menu?
- For example, the Service Catalog page is sufficient for browsing the catalog. It would be redundant and superfluous to include a dropdown of categories or popular items.

The screenshot shows the ServiceNow Service Catalog page for a Microsoft Surface Pro 3. At the top, there's a navigation bar with links for Knowledge, Service Catalog, Requests (13), System Status, Cart, and a user icon (JP). Below the navigation is a breadcrumb trail: Home > Service Catalog. A search bar is located in the top right corner. The main content area features a large image of a Microsoft Surface Pro 3 tablet with its keyboard dock. To the left of the image, the text reads "Microsoft Surface Pro 3" and "Get that can replace your laptop." Below the image, there's a sidebar titled "Categories" with sections for "Can We Help You?", "Hardware" (23 items), "Office" (4 items), "Quick Links" (2 items), "Software" (17 items), and "Standard Changes" (0 items). To the right of the sidebar, there's a "Popular Items" section with cards for "Sales Laptop" (Acer Aspire NX, \$1,100.00), "Automated Testing Fixture", and "Spigen iPhone 6 Case". There's also a "Report an Issue" section with a link to a simple form.

List Redundancy

- How many kinds of lists are enough?
- Answer = 1

My Incidents

SAP Financial Accounting application appears to be down
INC0000052 • 32m

I need help with a distribution list
INC0010145 • 4h

Help please
INC0010147 • 16h

I need help
INC0010146 • 16h

First 4 of 12

View all

service

Knowledge Service Catalog Requests 13 System Status Cart JP

View all requests

SAP Financial Accounting application appears to be down
INC0000052 28m

I need help with a distribution list
INC0010145 4h

Help please
INC0010147 16h

I need help
INC0010146 16h

Sales Laptop
REQ0010373 17h

Outlook will not open.
INC0010001 6d

My email inbox isn't getting new mail
INC0010143 14d

Incidents New Keyword Search

All > Caller is Jeff Pierce > Active = true

Number	Category	Short description	Priority
INC0010146	Inquiry / Help	I need help	3 - Moderate
INC0010001	Inquiry / Help	Outlook will not open.	5 - Planning
INC0010136	Inquiry / Help	I need help	3 - Moderate
INC0010135	Inquiry / Help	Outage on application Blackberry beginning at 2017-06-16 15:41:44	5 - Planning
INC0010147	Inquiry / Help	Help please	3 - Moderate
INC0010142	Inquiry / Help	I need help with a distribution list	3 - Moderate
INC0010002	Inquiry / Help	Sales forecast spreadsheet is READ ONLY	5 - Planning
INC0000046	Software	Can't access SFA software	3 - Moderate

CLAIRVOYANCE

I like how intuitive this is.

- Predict the user's need
- Personalize content
- Deflect incidents with relevant knowledge suggestions

Easy, Personalized Access

- Determine what 80% of users will be looking for, and put that right up front.
- Chances are, users will be looking for:
 - Their open tickets
 - The link to open a new ticket
 - Their assets

The screenshot shows a user interface with two main sections: "My Open Incidents" and "My Stuff".

My Open Incidents:

- I need help with a distribution list
INC0010145 • about an hour
- Help please
INC0010147 • 14h
- I need help
INC0010146 • 14h
- My email inbox isn't getting new mail
INC0010143 • 14d
- I need help with a distribution list
INC0010142 • 14d
- Performance problems with Electronic Messaging

My Stuff:

- MacBook Pro 13"
Issued: 03/10/2017
- Thunderbolt Display
Issued: 03/12/2017
- Adobe Creative Suite License
Issued: 03/12/2017

Current Events

- Notify the user of anything that might be of interest to them:
 - Outages
 - Updates
 - News

Your password is due to change in 6 days.

How can we help?

How can we help?



There's been an update to your ticket INC0042345.

Microsoft Outlook will be undergoing routine maintenance this evening.

KB Suggestions

- Suggest KB articles when submitting incidents
- Provide top read/searched article links on the homepage

The screenshot shows a ServiceNow interface with a sidebar titled "Articles that may help you resolve your issue". It lists several articles with their descriptions and a "Request" button:

- VPN Requests**: Use this form to request IPsec VPN Service. ServiceNow provides secure communications with customer networks over the public Internet using IPsec VPN technology.
- Create New Enhancement Request**: Use this form to submit an enhancement request. ServiceNow works with customers to enhance our product.
- Rename an Instance**: Use this form to rename an instance according to ServiceNow naming policy.
- How business rules work**: rule should run and what action is triggered when a business rule runs. Business rules run based on two sets of criteria: system-defined and user-defined.

On the right, there's a box titled "These articles are popular in your department" containing:

- Getting Around in Windows**: ★★★★★
- What is a cookie?**: ★★★★☆

Anticipate Questions

- If something moved or changed, let the user know.



Describe the issue (Required)
business rule not working

Select Issue Type (Required)

Question
If you want more information on using or administering your ServiceNow instance.

Request
If you need ServiceNow to perform a task in your instance not available in the [Service Catalog](#).

Something is broken
If you experience unexpected behaviour in your instance.

Performance issue
If you experience slowness with your instance.

Outage
If you cannot access or use your instance.

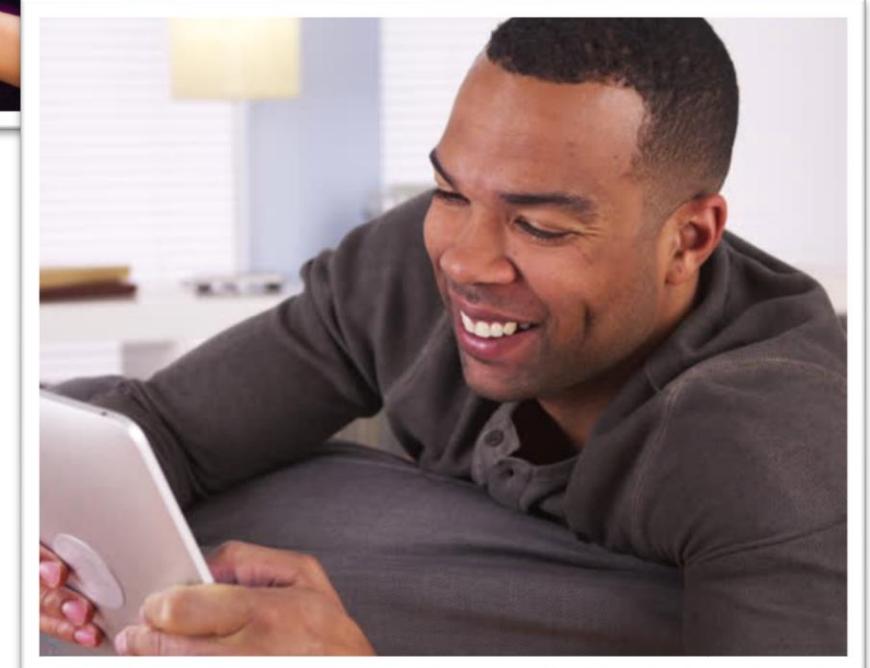
What happened to Category?
We're testing new routing logic that doesn't require you to select a category!



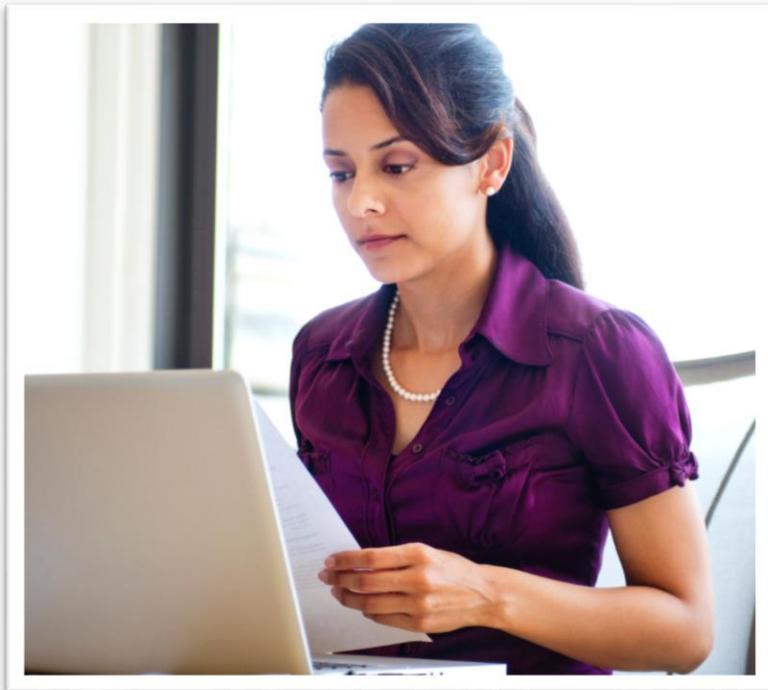
How do you know your users?

User Personas

Walk in a user's shoes.

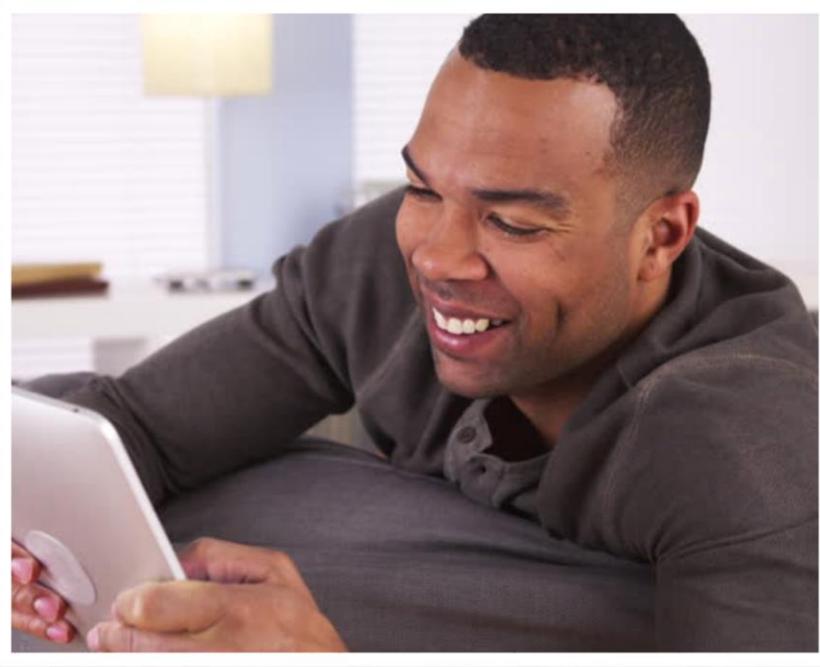


Anna



- Quick Stats
 - 38 years old senior Manager
 - Has over 20 direct reports
 - With the company for 4 years
- Typical Tasks
 - Publish reports
 - Writes a lot of emails
 - Attends a lot of meetings
- Comfort Levels with Technology
 - Long time user of a variety of apps and software
 - Familiar with the company's technology
- Self-Service Use Cases
 - Submit incidents and track their status
 - Approve employee approvals
- When & Where
 - Works 40 – 50 hours/wk in the office on her laptop
 - Approves requests over lunch breaks
 - Submits incident when under pressure to meet a deadline

Chuck



- Quick Stats
 - 24 years old sales rep
 - Works on a team with 5 other reps
 - With the company for 3 months
- Typical Tasks
 - Sales calls
 - Visit client sites
 - Publish contracts and sales materials
- Comfort Levels with Technology
 - Comfortable using popular apps and email
 - No familiarity with technical terms
- Self-Service Use Cases
 - Submit incidents and track their status
 - Order equipment
- When & Where
 - Works 30 hours/wk on the road with an iPad and iPhone
 - Reports incidents from a coffee shop

Stories & Use Cases

Why do we need both?

- Start with a blank page.
- Ask, “What needs does the end user have?”
 - I need to order services.
 - I need to get something fixed.
 - I need to learn how to do this myself.
 - I want a status update on my ticket.
 - I need to approve my direct report’s request.
- Define specific examples that represent 80% of each use case.
 - Chuck needs to upgrade his mobile phone.
 - Chuck wants to know the status of his request.
 - Anna needs to report a bug with a reporting tool.
 - Anna’s direct report needs her to approve a request for new monitor.
- The former are stories. The latter are use cases.
- Use stories for developing.
- Use use cases for designing and testing.

questions / comments



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