

- ✔ Implemented in less than two months
- ✔ Creation of a self-service portal that matches an existing Microsoft SharePoint® implementation, ensuring customer familiarity
- ✔ Very intuitive product with very little training required
- ✔ Within its first year, 30 percent of all tickets came through the self-service portal

The National Trust for Scotland is an independent charity that supports the conservation of natural and human heritage locations. It is Scotland's largest membership organization.



The Challenge

When Scott Newton joined the Trust as Head of IT, he knew the service desk team needed a robust IT service management (ITSM) tool. At the time, the team was logging calls in Microsoft® SharePoint®, and there was no visibility into how issues and requests were managed. Newton sought to gain increased workflow efficiencies and more insight into completed work.

Also, at this time, the Trust was implementing a new version of its SharePoint system, and Newton wanted the new ITSM tool to offer a self-service portal that could be easily configured to match the look and feel of the new SharePoint system.

"Any IT person who looks at a service desk solution expects it to include a self-service offering. This is now absolutely fundamental for improving efficiencies, so it was a mandatory tick box on our requirements list," said Newton.



The Solution

The Trust's service desk team created a shortlist of tool providers and went out to tender. Following this exercise, Cherwell Service Management became the front-runner in terms of features and look-and-feel.

"When we looked at Cherwell, my first impression was, it's similar to SharePoint because straight out of the box, it has a box screen layout, which made it great for us," said Newton.

Cherwell Service Management offers codeless configuration so everything within the tool can be built from the ground up to match specific requirements with no bespoke coding or scripting services required.

“We aligned the self-service portal to look like an extension of the SharePoint page, so we matched the branding, the color scheme, and the top banner. So when a customer clicks to log a call, he doesn’t know he’s now in a separate portal. He thinks he’s still in the same system. This was key to making the portal a success.”

Scott Newton, Head of IT

The Results

When implementing the new self-service portal, Scott and his team didn’t want to take away how things had been done or impose new approaches, but they did want to re-educate their customers and to change behaviors. Therefore, the team started to tell customers that incidents and requests logged via the self-service portal would go to the top of the queue. Email would get secondary priority. Phone would be third. Requests made in person, which was a common occurrence, would be sent to the bottom of the queue.

“This approach has been extraordinary successful,” said Newton. “30 percent of all incidents and requests now come through the portal, and it’s only been live for one year. 30 percent is a massive win for us, and I expect this to rise to 60 percent within the

next year. We have not had one single request for training. Our customers took to it immediately.”

The portal is keeping the Trust’s service desk team very busy, and it’s helping them secure more relevant information to close tickets more quickly and efficiently. According to Newton, the implementation of Cherwell Service Management has helped to raise the service desk’s standing in the organization beyond all comprehension.

“Previously, the Trust’s management team had little insight into the service desk team’s work load, capacity and work rate because there wasn’t a tool in place from which to extract this data. Cherwell has brought massive clarity to this,” said Newton.

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