Internal IT support strategies often fail to incorporate the unique technology requirements of different sets of business users. I&O leaders must identify and build business user personas for the most frequent users of IT services to best meet business needs and reduce bureaucracy in IT support.

Overview

Key Findings

- I&O leaders design support channels based on old habits and report data that is missing patterns of behavior, resulting in lower business user satisfaction levels.

- A “one size fits all” approach to IT support reinforces the perception that the IT service desk is ill-equipped to deal with business units’ unique technology requirements.

- IT service desk staff are dependent on business users to provide data on their fundamental technology needs. This results in service delays and frustrates business users.

Recommendations

I&O leaders focused on infrastructure, operations and cloud management should:

- Develop business user personas by analyzing service desk data to identify the most frequent users of IT services.

- Streamline request fulfillment by automating user-persona-based authorizations and entitlements.

- Enhance the business user experience by building curated IT support experiences specific to user personas that evolve as usage patterns change.
Introduction

Business users prefer specific support channels and have distinct technology needs depending on their role within the organization. But I&O leaders typically do not factor these unique preferences and requirements into IT support strategies. This lack of perspective results in a reactive IT support model that creates inefficiency through unnecessary calls to the desk and degrades the service experience for business users.

How can I&O leaders build a proactive IT support model that provides for a curated IT service desk experience? This research describes the three steps that I&O leaders must take to build user personas that enable a purposeful and curated IT support experience for business users (see Figure 1).

Figure 1. Use Personas to Curate IT Support Experiences for Business Users

Analysis

Identify the Most Frequent Users of IT Services

A persona is a planning tool that enables the identification of key business user segments involving demographics, job roles, location and consumption patterns.

Developing user personas enables service provider organizations to adapt their service strategy to business user expectations rather than taking a “one size fits all” approach. Developing personas as part of an IT support strategy can be a resource-intensive process. Hence, it is important to take a “big rocks” approach that delivers maximum value for the effort invested. Some business users are more frequent consumers of IT services than others since their role in the organization has a greater dependence on IT technology and services.
Build user personas based on these users by taking the following steps:

1. Analyze IT ticketing information for the last eight to 10 months — mainly incidents and service requests (including IT self-service and manually processed tickets).

2. Sort the list of users to identify the highest consumers of IT services.

3. Group users based on job role, mobile work or not, age demographics, and preferred channel of support. Identify the top three to four job roles with similar aforementioned parameters (mobile work or not, age demographics, etc.) that represent the highest support volumes.

4. You can also add one to two job roles that do not necessarily contribute to higher workload volumes but are considered critical to the organization's success (for example, executives).

This will give you a list of five to six personas. Additional personas can be considered depending on the capacity of the I&O team to develop and support the personas in the IT service management (ITSM) platform.

Analysis of more than 10,000 business employees during the COVID-19 pandemic revealed several demographic factors that influence user preferences for different support contact channels. Age is the most predictive factor (similar to previous digital workplace studies in 2017 and 2019), with comparatively older people preferring to get IT support by phone or email, and younger people preferring to ask a colleague or search the internet.

I&O leaders should expect different attitudes and requirements of IT support within their organization. Gartner has identified five types of digital workers based on their use and engagement with technology: Caretakers, Engineers, Mavericks, Navigators and Pilots (see Note 1). These are summarized in Figure 2 and are fully explained in Understand Five Key Types of Worker to Energize Your Digital Workplace. Figure 2 also shows how these worker types differ in their preferences of IT support options. In the Figure, support channels labeled “prefers” are comparatively more likely to be selected by that type of digital worker than the others, and the opposite when labeled “avoids.” This shows how worker types can differ, but does not reflect the overall popularity of a support channel.

For example, phone, searching the internet and asking a co-worker are generally more popular than virtual support agents or asking a friend. Finally, Figure 2 provides examples of common job roles that align to these categories, based on how workers in such roles responded to a survey.
**Figure 2. Gartner Digital Workplace Worker Types and Preferences**

<table>
<thead>
<tr>
<th></th>
<th>Caretakers</th>
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<th>Engineers</th>
<th>Pilots</th>
<th>Navigators</th>
</tr>
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<tr>
<td><strong>Digital Workplace Worker Types</strong></td>
<td>They believe digital skills don’t help them and that their organization gives them poor technology.</td>
<td>Young workers who bring their own technology to work and have distinct attitudes about digital work.</td>
<td>Late-career experts in digital technology who are satisfied with their work.</td>
<td>Midcareer workers who feel comfortable with technology and who spend less time at their desks.</td>
<td>Office workers in midcareer who are deft but not expert with digital technology.</td>
</tr>
<tr>
<td></td>
<td>They express by far the lowest satisfaction with IT.</td>
<td>They are common in IT departments and fairly common in sales and management.</td>
<td>They have the most affinity with senior managers and believe them to be in touch with digital technology challenges.</td>
<td>They are extending their skills to use devices and applications that their organization authorizes or that they obtain without authorization.</td>
<td>They are keenest to see time to work from home. Given the choice, they could work at home 35% of the time, on average.</td>
</tr>
</tbody>
</table>

- **PREFERENCES**
  - Phone
  - Send email
  - Ask a co-worker
  - Virtual support agents
  - Ask a friend
  - Ask a freelance expert
  - Self-service
  - Internet search
  - Live chat
  - Self-service
  - Ask a co-worker
  - Internet search
  - Live chat
  - Virtual support agents
  - Walk-up center
  - Ask a freelance expert
  - Ask a friend

- **AVOCADO**
  - Warehouse manager
  - Medical practitioner
  - Therapist/counselor
  - Marketing/product development
  - IT system administrator
  - Software developer
  - Financial analyst
  - Maintenance technician
  - Teacher
  - Home tutor
  - Account executive
  - Construction superintendent

These general trends can help with planning support strategies, but I&O leaders should carry out their own local research within the organization to better represent their business user expectations. The Gartner Digital Worker types are not personas by themselves, but they provide good insight into understanding business user behaviors and consumption patterns. I&O leaders can use all or part of **Tool: Understand Digital Workplace Sentiment — Resources to Survey, Benchmark and Share Key Takeaways** to survey business consumers within their own organization.

Once I&O leaders establish the initial list of personas, additional personas can be added over time to cover more employees in the organization.
Automate User-Persona-Based Authorizations and Entitlements

Based on the personas identified in your organization, strengthen existing channels and, if needed, implement additional support channels that represent the personas’ preferences. I&O leaders usually find it difficult to fund additional support channels. However, mapping the most frequent business consumer groups to personas will provide adequate justification to supplement additional support channels as required. This is a pragmatic approach to IT support strategy as opposed to a generic IT support strategy that does not account for user preferences. Advertise newer IT support channels, especially to the personas that will most benefit from them. Leverage the IT portal, email, newsletters, town halls and other engagement channels to get the message across.

Enhance business users’ experience by capturing personas’ typical technology needs. At a minimum, capture the following for each persona:

- Minimum hardware entitlements for the persona
- Minimum software entitlements for the persona
- Minimum system access entitlements for the persona

A sample entitlement list for personas is provided in Table 1.
### Table 1: Persona Entitlements List

<table>
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<tr>
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Source: Gartner (October 2021)

The list in Table 1 is for illustrative purposes only. Listed personas and their entitlements may differ by organization. Also, these entitlements represent the bare minimum technology needs of employees mapped to the personas akin to a minimum viable product. Any nonstandard/special technology needs should be fulfilled via the normal request-fulfillment process.
Leverage past service consumption data, and firm up the entitlement list by interviewing a sample population of employees in the roles mapped to short-listed personas.

Use chatbots and agents supporting live chat to automate the service request catalog and authorizations for predefined entitlements. Predefining these entitlements for the personas avoids toil for business users as well as IT service desk personnel. A common complaint from business users is that I&O’s processes are bureaucratic, and most service requests result in a lot of phone calls and a spate of email exchanges. Defining entitlements for personas avoids this. Once these persona entitlements are predefined in the ITSM platform, business users will be gratified to know that the IT service desk understands their needs and is willing to help them get what they rightfully need to do their job.

**Build Curated IT Support Experiences for Personas**

A curated IT support experience can further enhance IT service for each persona. I&O staff representing the IT service desk, service management office (SMO), or ITSM practitioners and ITSM platform support teams will have the most important role with regard to persona management.

Persona management includes defining the personas, documenting their entitlements and developing curated IT service experiences. I&O leaders must support funding requirements with regard to personnel allocation and ITSM tool implementation activities.

Based on service consumption patterns, identify typical incidents and service requests for each persona. Most modern ITSM tools will be able to feed these consumption patterns into the IT service portal that is uniquely designed for all business users mapped to a particular persona. Figure 3 shows a mockup of an IT portal curated for a software developer persona.
The curated information displayed for each persona will be refreshed automatically based on changes in consumption patterns as recorded by the ITSM platform. Providing this customized information to business users mapped to a persona will save them time and help I&O personnel to review the entitlement list for each persona.

Analyze the IT self-service and keyword search requests by business users mapped to personas to understand the gap between requested services and predefined services. For example, if business users mapped to a persona regularly request an item from the IT service catalog, including this item in the persona's predefined entitlements will allow such requests to be processed in a “no questions asked” manner. Fulfill preapproved service requests by automation to the extent possible using software deployment and access management tools. The goal is to provide a service experience that is as close as possible to business user expectations.
Evidence

1 GEAR showed a more than 200% increase in inquiries around personas in the period from June 2019-July 2020 through June 2020-July 2021 for the ITLTP/ITL group. Gartner search Analytics showed more than 900 search requests for “personas” from October 2020 through July 2021.

2 Gartner’s Digital Worker Experience Survey was conducted to understand workers’ technological and workplace experience and sentiment. The research was conducted online from November through December 2020 among 10,080 respondents from the U.S., Europe and APAC. Participants were screened for full-time employment in organizations with 100 or more employees and were required to use digital technology for work purposes. Ages range from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income, so that results are representative of working country populations.

Results of this study do not represent global findings or the market as a whole but are a simple average of results for the targeted countries covered in this survey.

3 This analysis is built on job titles from advertised vacancies pulled from Gartner TalentNeuron in November 2020. Gartner TalentNeuron is the premium end-to-end labor market intelligence solution combining real-time insights from trusted global data sources, deep research and expert advisors to guide decisions on location, talent and competition. For more information, see Gartner TalentNeuron: Trusted Labor Market Insights. These job titles were consolidated into broader roles, and, from this, the top 50 most commonly advertised job roles (2.6 million vacancies) were used for this research.

4 The top 50 job roles extracted from the TalentNeuron search were matched with the most closely available industry and business unit types that Gartner Digital Worker Experience Survey participants selected. For example, cashiers/tellers were matched with customer services business units in the financial services industry. Healthcare workers and teachers were categorized under other and unspecified business units in the healthcare and education provider industries, respectively. Human resources workers were matched with human resources business units in any industry.
The average support channel preferences of participants in each of the 50 job roles were compared with the average support channel preferences of the five digital worker types (i.e., Caretakers, Engineers, Mavericks, Navigators and Pilots). To identify different types of workers, a segmentation analysis was conducted. We used cluster analysis — a generic approach taken to identify groups of individuals who are similar to each other but different from individuals in other groups. We used an iterative two-step cluster algorithm, because it can handle all types of variables.

**Note 1: Gartner-Defined Worker Types**

To identify different types of worker, a segmentation analysis was conducted to identify groups of individuals who are similar to each other but different from individuals in other groups. See Understand Five Key Types of Worker to Energize Your Digital Workplace for more information.
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**Recommended by the Authors**

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- **8 KPIs That Demonstrate How Self-Service Initiatives Advance Your IT Service Desk**
- **Design IT Self-Service for the Business Consumer**
- **3 Simple Ways IT Service Desks Should Handle Incidents and Requests**
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