

# Top 10 Key Elements for Leading Edge Service Management

Service Your Way for Your Organization

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## How do you Deliver Industry Leading Service within your environment

Every organization is unique with its own business practices, policies and service flows. This can be based on the size of the user community, the varied level of technical expertise of the end user community and the service desk or distinct industry vertical requirements. Whatever the reason, no two organizations are the same and implementing industry leading service management can provide a competitive advantage.

There is a plethora of tools on the market which implement industry best practices; but many of these tools force fit your organization into the way they think you should deliver service rather than the tool enabling you to provide industry leading service that best fits your organizational requirements.

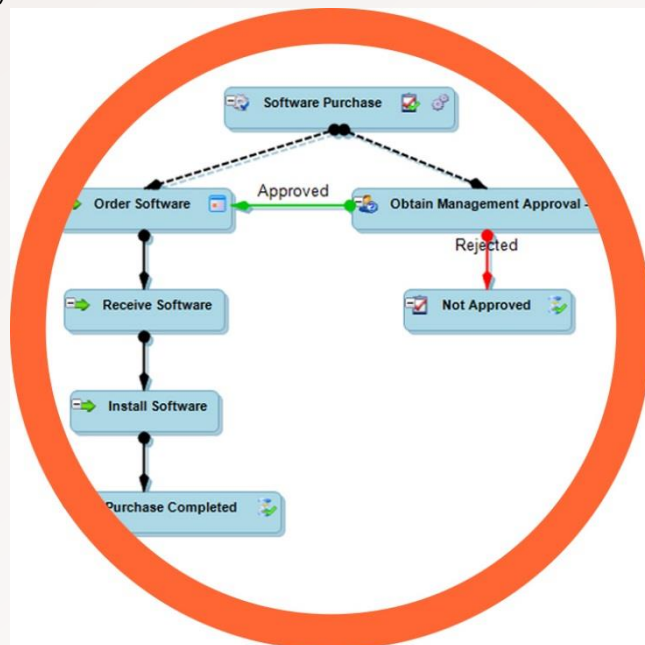
In this document we'll look at the **top 10 key elements required from an application** which will provide a service management framework flexible enough to operate **your way** delivering **your service**.

### 1. Workflow and Routing

Although we cover this under the same heading (only to keep our top 10 list to 10) this should never be synonymous. Routing is the ability to route a request from one individual to another and workflow enforces a certain policy flow for managing requests. A Service Management Framework (SMF) must support both to enable you to define the workflow of a given service process and also support routing such that certain steps of the workflow can be routed to individuals, teams, or queues. From this you can derive the distinct difference:

- **Workflow** enforces the flow or steps required for any given service process
- **Routing** handles the ability to route individuals, teams or queues based on the workflow steps.

The workflow process must support reusable processes, varying levels of approvals (i.e. single level approval, multi-level approvals or voting approvals) and branching based on out-of-the-box request properties and also user defined properties. For example you may require a software purchase approval for anything over \$500 but anything under \$500 is automatically ordered. This should be a simple point and click operation during the configuration to manage this (done your way for your organization).



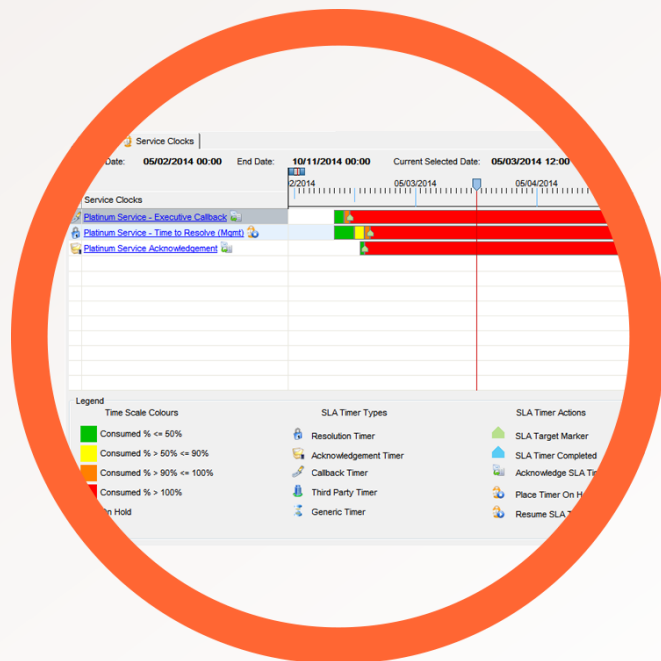
## 2. Skillsets / Subject Matter Experts (SME)

One often overlooked requirement is the ability to define skillsets (or Subject Matter Experts) at the individual, team or queue levels. We've found over the years that organizations, depending upon the type of request, time of day, season etc. the skillsets may vary. For example a retail organization during the holiday purchasing season may require that all requests are directly assigned to an individual (irrespective of the inbound channel – i.e. mail, phone, support portal, mobile request, chat etc.) to ensure that any issue is resolved immediately as a broken cash register directly impacts an organization in peak season. Whereas during the summer months they may wish to operate in queue mode when things are less hectic. To further elaborate on this point many organizations want to enable inbound web and E-mail requests. We all know this is a great facility for service but also implies that the service desk must be open 24 hours a day 7 days a week and many are not staffed or tooled for this type of support. Therefore during core working hours many organizations work to a direct assignment of an inbound request based on load balancing algorithms and support queued requests when they are received off hours. What this means to your organization is, with the correct skillsets defined, requests are routed to the correct individual who can best service this request. If it is received off hours it will go to the queue of those personnel who can best service this request when operational hours commence or the night shift can service the queue (again this is service **your** way for **your** organization)

## 3. Service Matrix

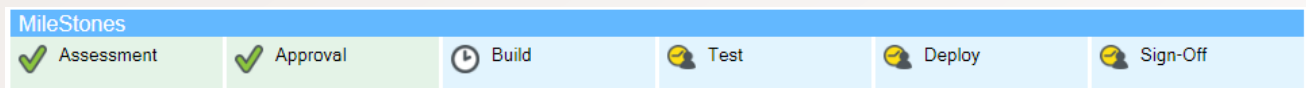
A key element in service management is knowing whether or not you are managing the client's expectations. To do this you need a framework which enables you to map your client's service expectations into a manageable configurable definition. Again the framework must be able to map these service expectations (or Service Level Agreements if you are contractually bound) based on properties of the request. In the screen shot we depict a request which has a call back definition for an executive since the properties of the individual coordinate with the service policy and engage this clock. Therefore your SMF must support varying types of service clocks throughout the request lifecycle and must adapt based on your service policies. This alleviates the service desk from manually setting these policies or looking up the policies during the request lifecycle and simply providing service and engaging the end user.

It's all based on **your** policies for **your** organization. The framework, at minimum, should support Resolution Timers, Call Back timers and Assignment Timers. Further to this, most modern frameworks should also allow you engage timers to manage any Third Party entities which need to be involved or Generic Timers which facilitate the tracking and reporting of any milestone timers which may be required within your environment. Additionally, support for your working hours for calculations should be supported.



## 4. Service Catalogs

Ok, there's been a significant push from the IT industry to implement Service Catalogs. The fact is that this requires a significant effort to design the necessary forms to capture the correct input. Additionally, the techno-babble needs to be removed such that the end user views the catalog in **their** words in **their** organization (we all know terminology changes from organization to organization). Therefore, any framework must enable you to publish service catalog groups, with necessary security and visibility with the terminology that enables the user to access it their way. Additionally, the forms designer must provide robust configuration capabilities to define the forms which are easy for the user to use and access. Additionally, a milestone marker providing immediate feedback as to the state of the request should be available and this must be defined based on the type of request and the workflow initiated (not generic) for the Incident, service request or request fulfillment. Essentially, any type of request that can be submitted.



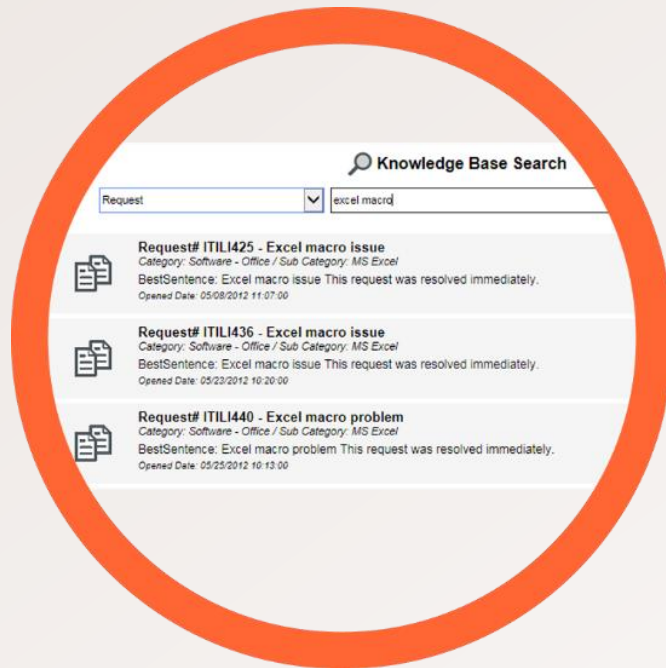
Service catalogs should be integrated within the framework where different types of requests can be grouped into a single overarching group for easy access and optimal usability. They should integrate directly with the workflow and skillsets where the service catalog simply inherits the process capabilities that it is attached to. A modern SMF will have Service Catalogs wholly integrated enabling you to define a service for ANY type of request which the service desk can fulfill (not just limited to those defined in ITIL).

## 5. Out-of-Band Communication

In today's work environments the service desk has requests coming at them from a variety of inputs. Leading edge service desks employ a Single Point Of Contact (SPOC) approach but this still does not eliminate the need to effectively manage out-of-band communications which may result from walk-ups, chat sessions, E-mail with cc lists etc. Service your way implies that a tool should facilitate the aggregation of all these disparate communication channels into a Single Point of Contact so your service policies, skills definitions, workflows and messaging components work seamlessly regardless of the origin of the service request. For example a user sends in a request through E-mail which has their manager cc'd on the originating E-mail. It's too time consuming for the service desk to keep that manager in the loop so this aggregation of E-mail carbon copies should be automatically handled.

## 6. Knowledge Management

The ability to capture your knowledge, seamlessly is paramount in today's world of continually evolving IT. Service Desk personnel require the ability to quickly search historical information for previous resolutions as well as publishing documents for the end users to better aid them in a continuous engagement throughout the entire request lifecycle. This integrated approach should also aid in the advanced ability to quickly link Incidents with Problem Management. This affords the opportunity to easily integrate Problem Management within the service environment, ultimately providing a huge win in saved unproductive corporate time.



## 7. Integrated CMDB/Assets and Event Management

Having an integrated CMDB which supports the orchestration of Network Management events enables the Service Desk to have a holistic view of the corporate environment – enabling them to better service the user community. Furthermore, this also facilitates a comprehensive Change and Release Management cycle.

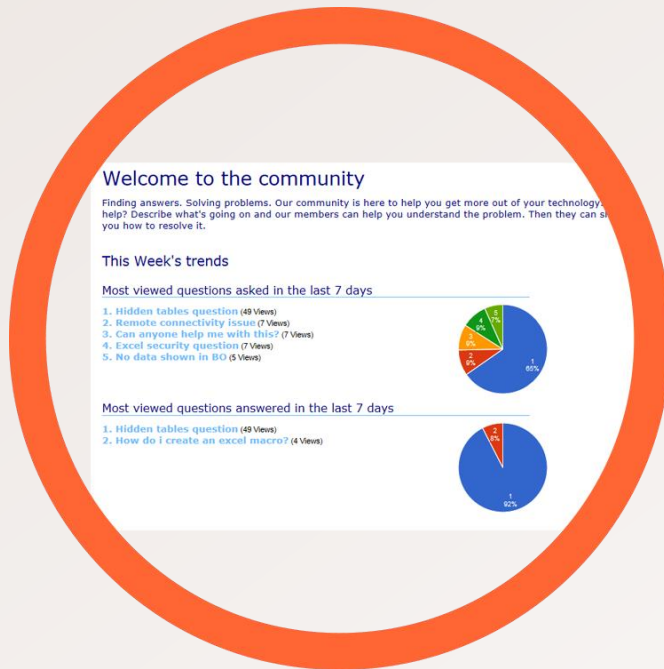
Any modern CMDB/Asset Management should support the concept of assets or Configuration Items which are consumables (i.e. software, spare parts, hard drives, monitors) and consumers (i.e. those assets which consume a consumable) which result in a compound asset.

This type of approach provides dual capabilities:

1. To provide an integrated asset inventory of licenses and consumable assets.
2. To develop relationships, or topologies of the CMDB/Asset repository to ultimately better service the end user community.

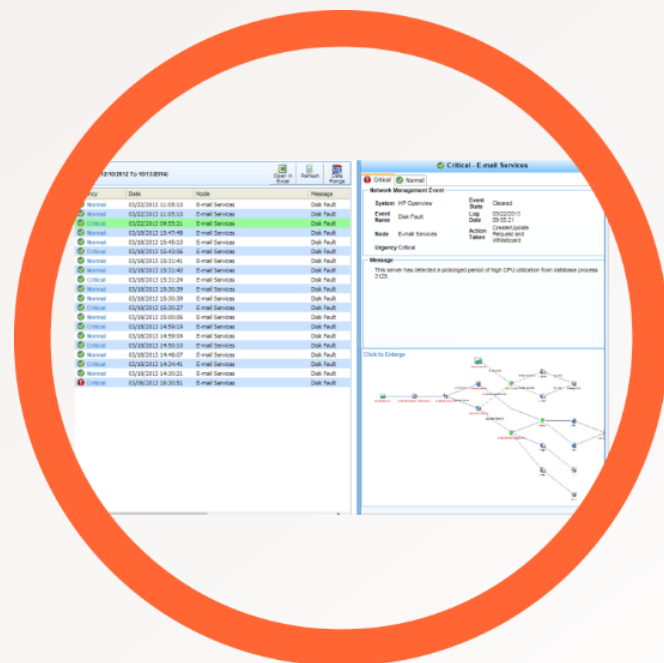
## 8. Communities

In today's Bring your Own Device environment augmented with a Social IT spin you need a way to engage the user with other users while not losing the valuable information that is entered through a socially interactive environment. Having separate wikis outside of the service desk complicates the aggregation of data and also loses the focus of the value of the service desk since this will not be viewed by the organization as a significant offering of the service desk. The concept of Communities enables you to define your own communities for the end users for them to interact and engage on peer basis while the service desk can moderate the communities and ensure that the correct information is supplied when moderation is required.



## 9. Messaging

Everyone is mobile in today's fast paced environments making Just-In-Time notifications and messaging paramount in providing leading edge service. Outbound messaging and notifications should be policy based and derived from the service management processes ensuring that the service desk personnel are abstracted from when someone requires a notification – the system configuration should manage the formatting and sending messages at the correct time to the correct individuals. As the service desk's reach becomes more global in scope you need to handle multiple languages in a single installation including data entry and any notifications sent from the system. The user should be able to correspond in their native language – simplifying the interaction with the service desk for all organizational employees.



Not everyone is on schedule 24x7 and therefore you need a robust notification schedule to handle off hours high priority items, off-hours on-call notification, off hours ops-centre, vacation

redirection; all without having to reassign or re-queue requests. Ensuring that the correct personnel receive notifications at the correct time.

## 10. Open API/Data Exchange

For those unfortunate times when your service desk has to integrate with in-house applications or portals, an open API supporting modern approaches such as web services and service oriented architectures are a must. This will allow you to integrate with third party applications and also third party support systems within a robust framework that can scale to your needs.



## A Final Word About IncidentMonitor™

IncidentMonitor enables you to easily adapt to the needs of your organization. With its configuration capabilities and unique project concept you are able to start with a simplistic linear request management system and grow this over time. We see many implementations start with a simplistic Incident Management approach which simply aggregates all of the out-of-band (i.e. e-mail, chat, web requests, etc.) and in-band data (service requests, incidents, change requests etc.) into a single system for reporting and statistics. Then as the organization matures (by organization we mean your service organization and your end user community) other aspects are turned on (or enabled).



## About Monitor 24-7 Inc.

Monitor 24-7 redefines service management by helping organizations improve their customer-facing functions. Monitor 24-7 provides simple solutions that tackle complex help desk processes -- right out of the box. Our goal is to help customers reduce running costs, manage change, implement a fully functional advanced software solution and lower the cost of ownership.

Monitor 24-7 is a software development organization focused on service management. Years of experience and many different customers have brought us where we are today. We believe we have proven ourselves and we are very proud of our flagship IncidentMonitor -- an enterprise service management solution which is being used in many different environments.

- 100% dedication to Service Management since 1999
- Over 250 customers, more than 10,000 licenses sold
- Active in 10 countries

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