

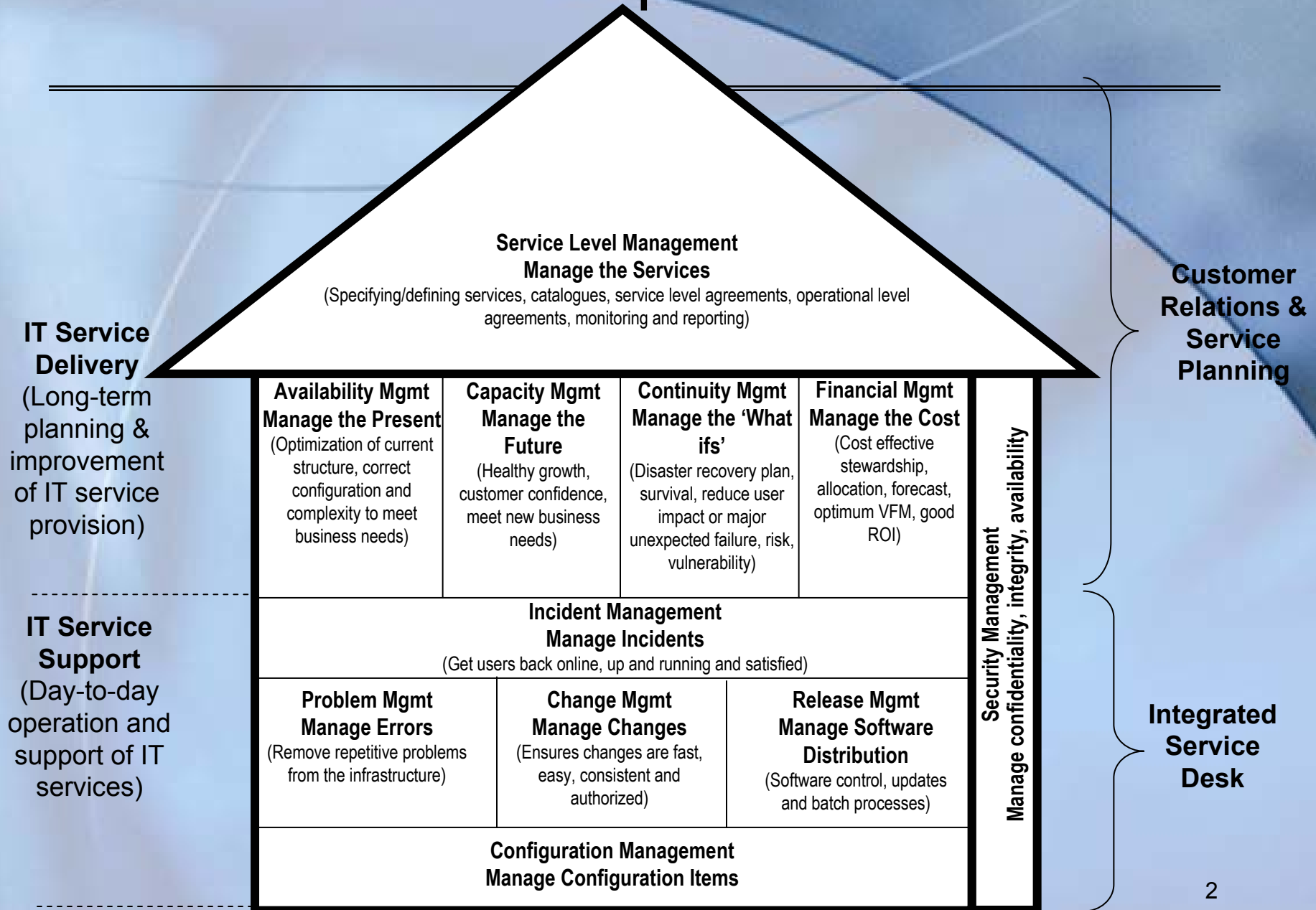
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# Help Desk of the Future: Service Management Center

with  
George Spalding

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# ITIL Conceptual Model



# The Bottom Line

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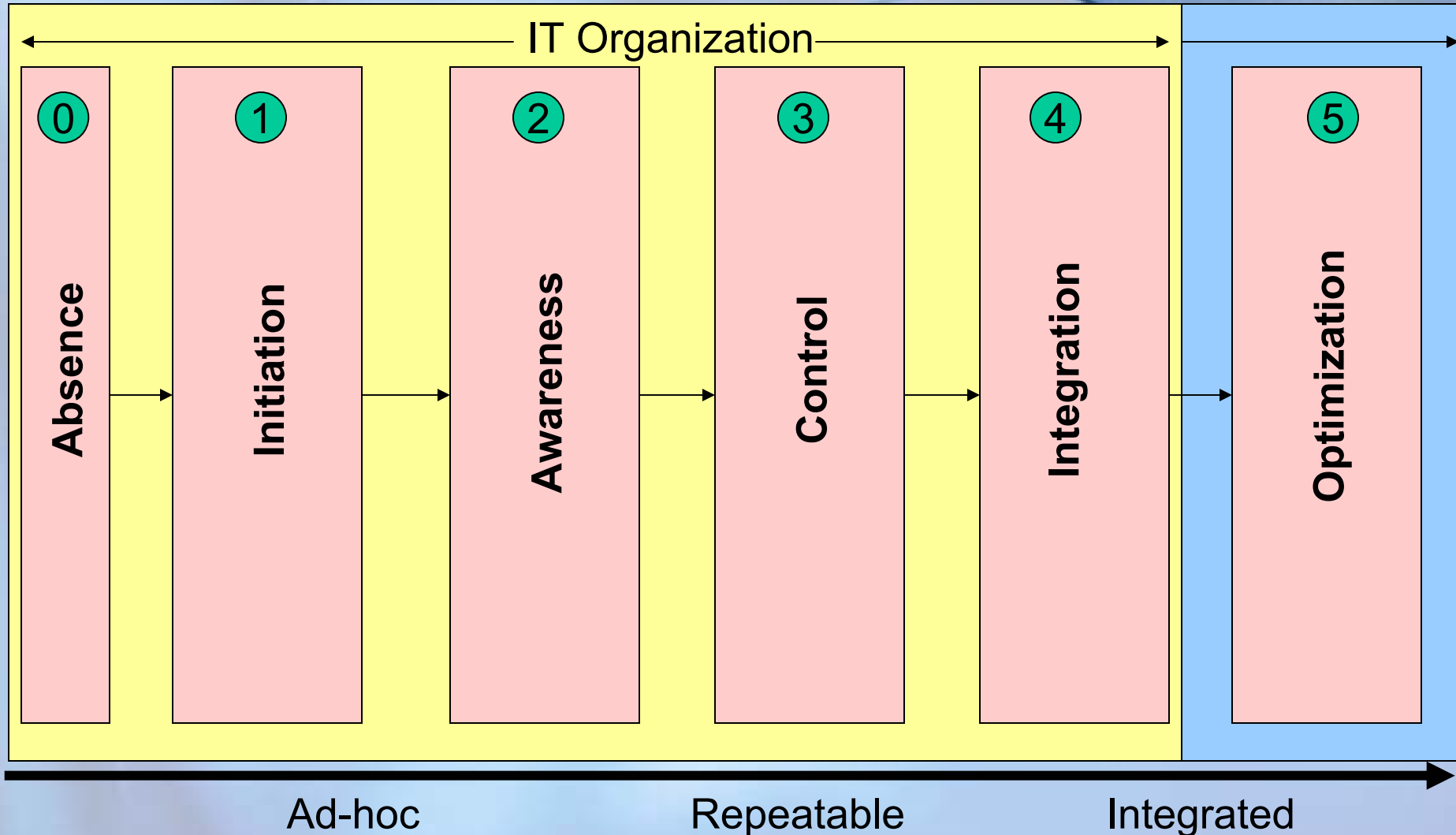
Process improvement should be done to help the business—not for its own sake.



“In God we trust,  
all others bring data.”

- *W. Edwards Deming*

# IT Process Maturity (CMMI & SPICE)



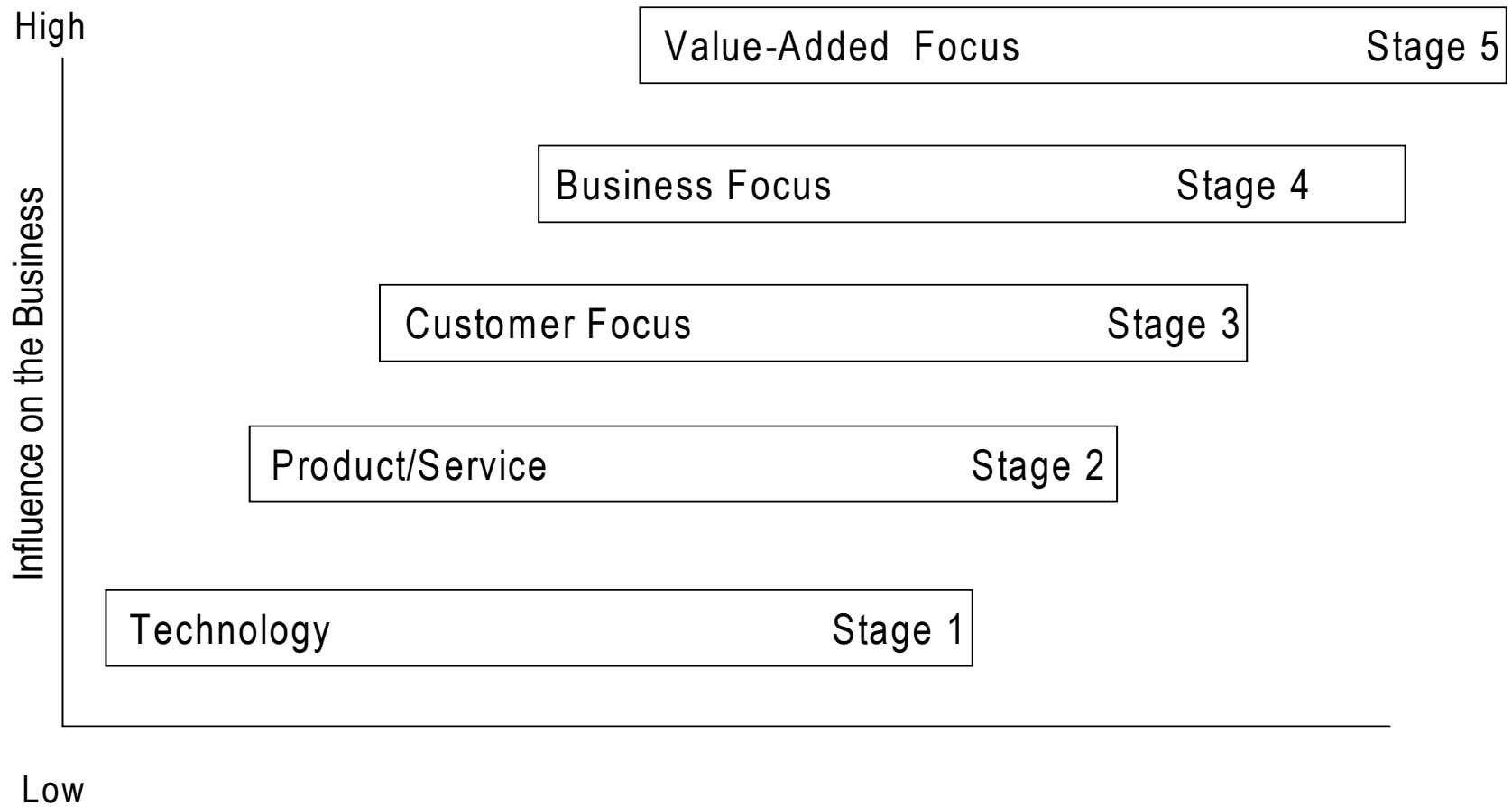
# Call for Action

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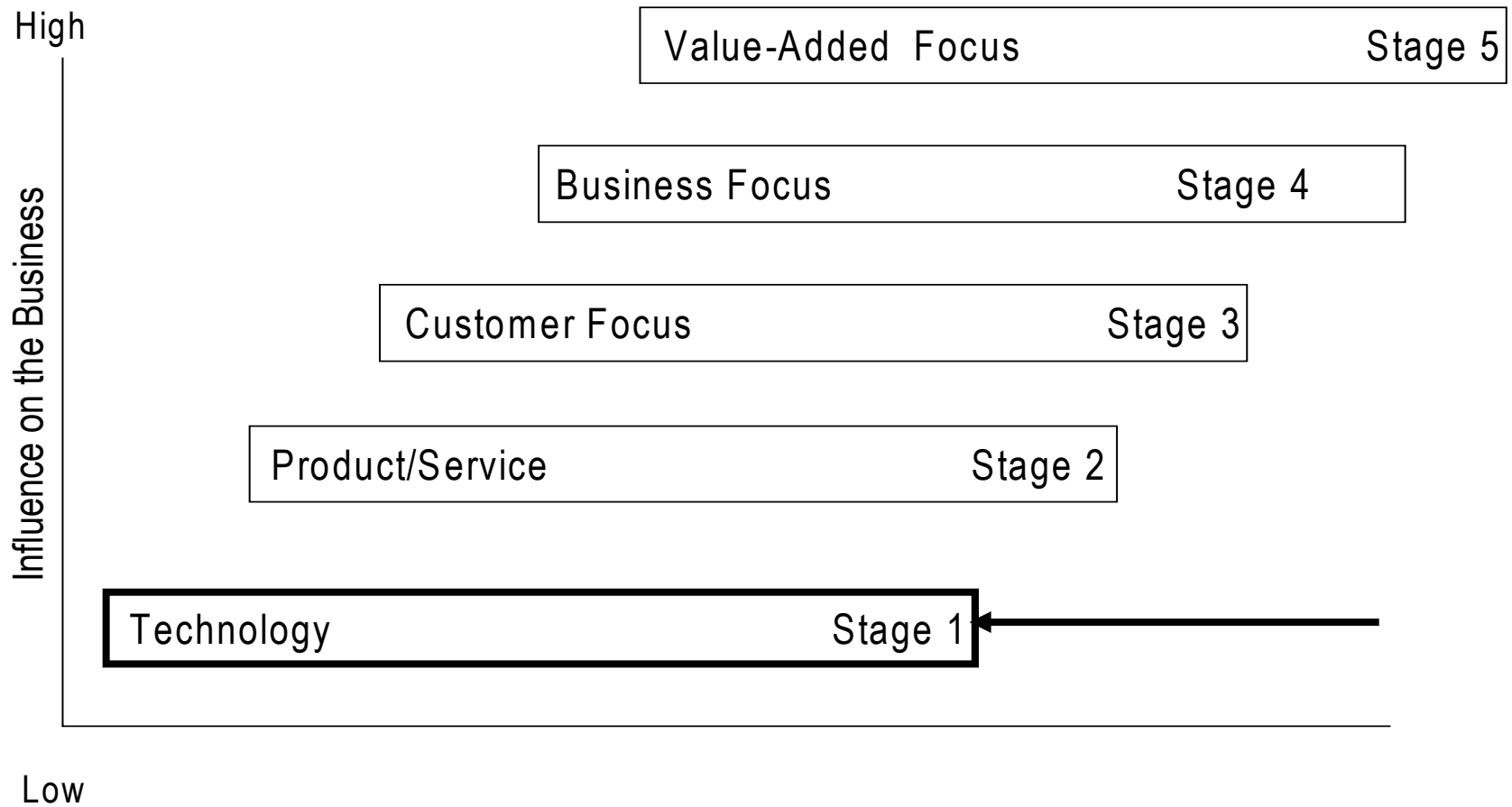
Business-driven IT department priorities result in IT service management and support pressure:

- Provide On-Demand Services “utility model”
- Respond to increased service demand – shrinking budgets
- Create effective Enterprise-wide service delivery structures and accountabilities
- Demonstrate Business Value and impact of IT
- Improve Credibility of IT

# Organizational Maturity



# Organizational Maturity



# Technology – Stage 1

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## Vision and strategy

Business views role of IT as Infrastructure provider (hardware, software and network provider). No clear vision statement on role of IT.

## Steering

Principally driven by cost. Stability, availability and performance of IT platforms and networks are the main focus and implicit steering parameters.

## Processes

Focus on Systems and Network Management, IT design and implementation.

# Technology – Stage 1 <sup>(2)</sup>

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## People

Technology excellence.

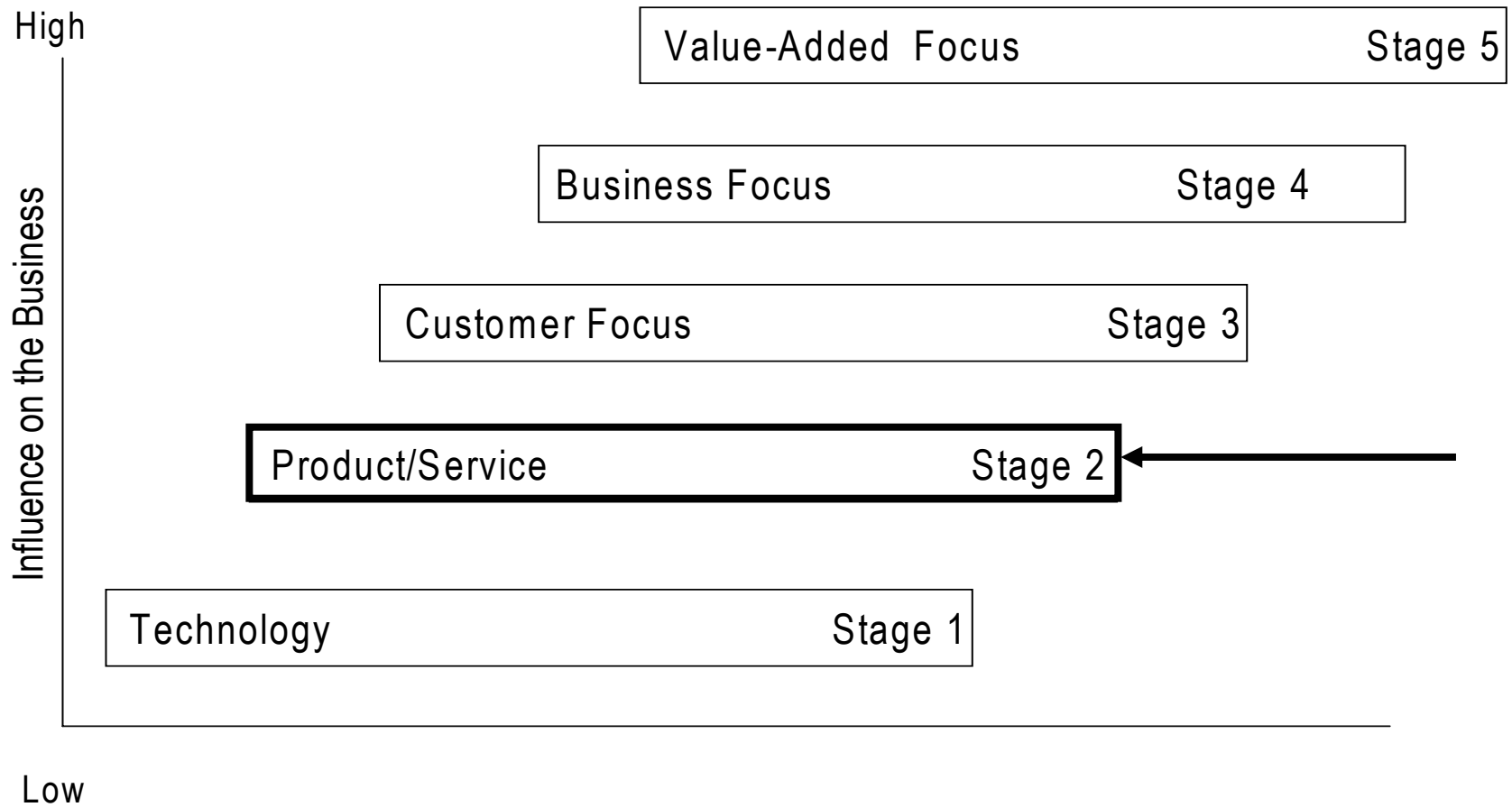
## Technology

Systems and Network Management tools are independently purchased and used to manage technology subsets.

## Culture

'We are IT experts'. There is little interaction or understanding of providing 'services' to the business.

# Organizational Maturity



# Product/Service – Stage 2

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## Vision and strategy

The IT organization recognizes that it delivers a portfolio of products and services to the business. Evidence of IT strategic planning, little input from business.

## Steering

Services are defined in technology terms such as bandwidth, processing performance, disk capacity. Reporting and steering on IT defined parameters.

# Product/Service – Stage 2 (2)

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## Processes

Strong focus on ITIL Service Support processes and the more operational aspects of the ITIL Service Delivery processes, such as performance measurement and tuning, availability measurement and building resilience. Reporting mechanisms are used to improve product and service performance.

# Product/Service – Stage 2 <sup>(3)</sup>

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## People

Clearer definition of IT functions. Recognition of first and second-line expertise.

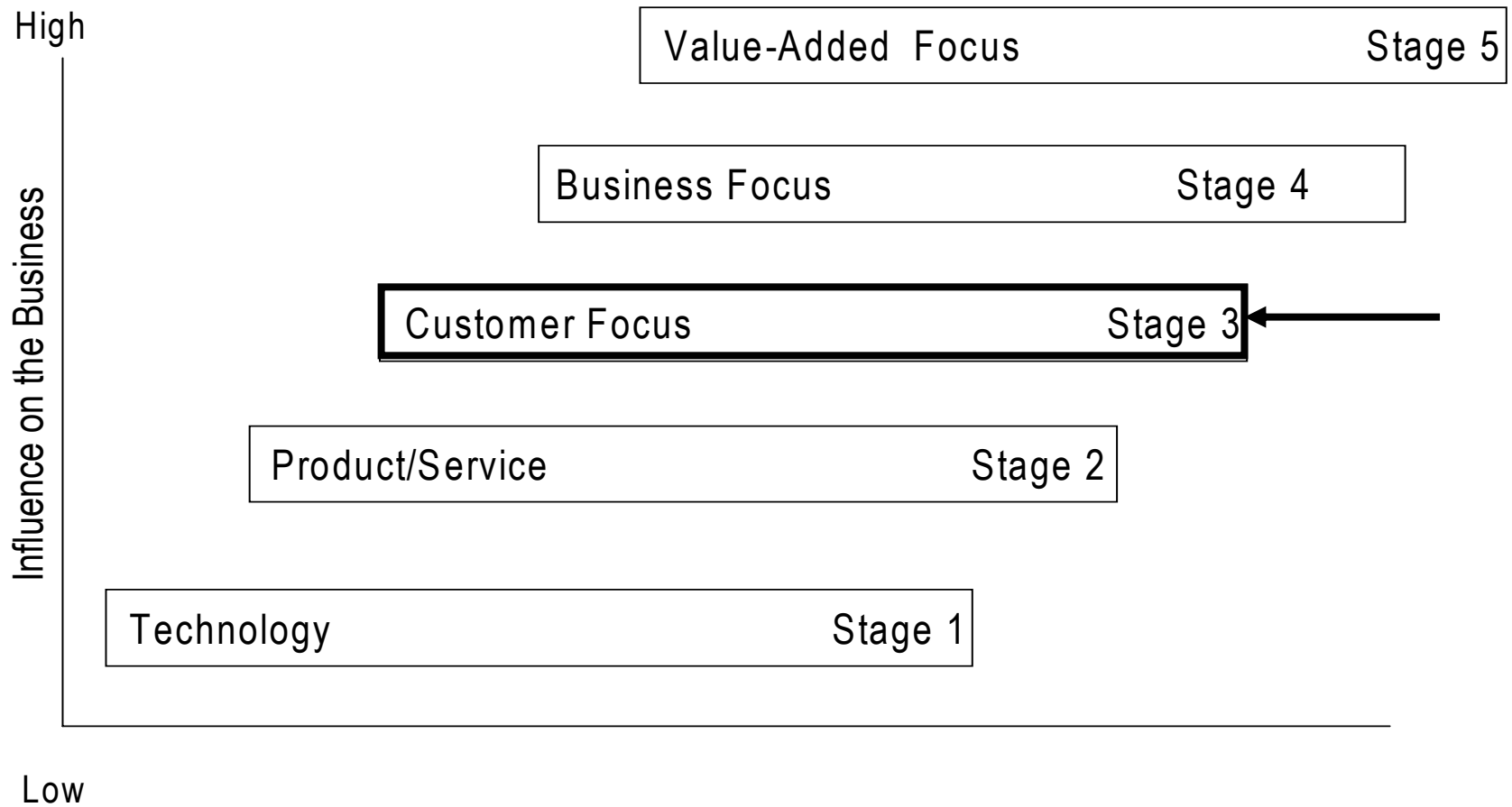
## Technology

More product standardization. Design of architectures and integration into management tools and systems.

## Culture

Team and product orientation. Customer awareness and promotion towards Customers.

# Organizational Maturity



# Customer Focus – Stage 3

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## Vision and strategy

IT seen as IT Service Provider. IT strategy linked to business strategy.

## Steering

Service Level Agreements steer IT. Change Management integrated into project structure for ensuring smooth handover from new IT dev.

## Processes

Service Level Management, formalized Account Management. More focus on planning aspects.

Support processes deliver clear service and Customer-related performance. Process reporting underpins service level agreements.

# Customer Focus – Stage 3 <sup>(2)</sup>

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## People

Service Management training and defined activities and roles. Evidence of process ownership, Formalized Account Management and Service Management roles in place.

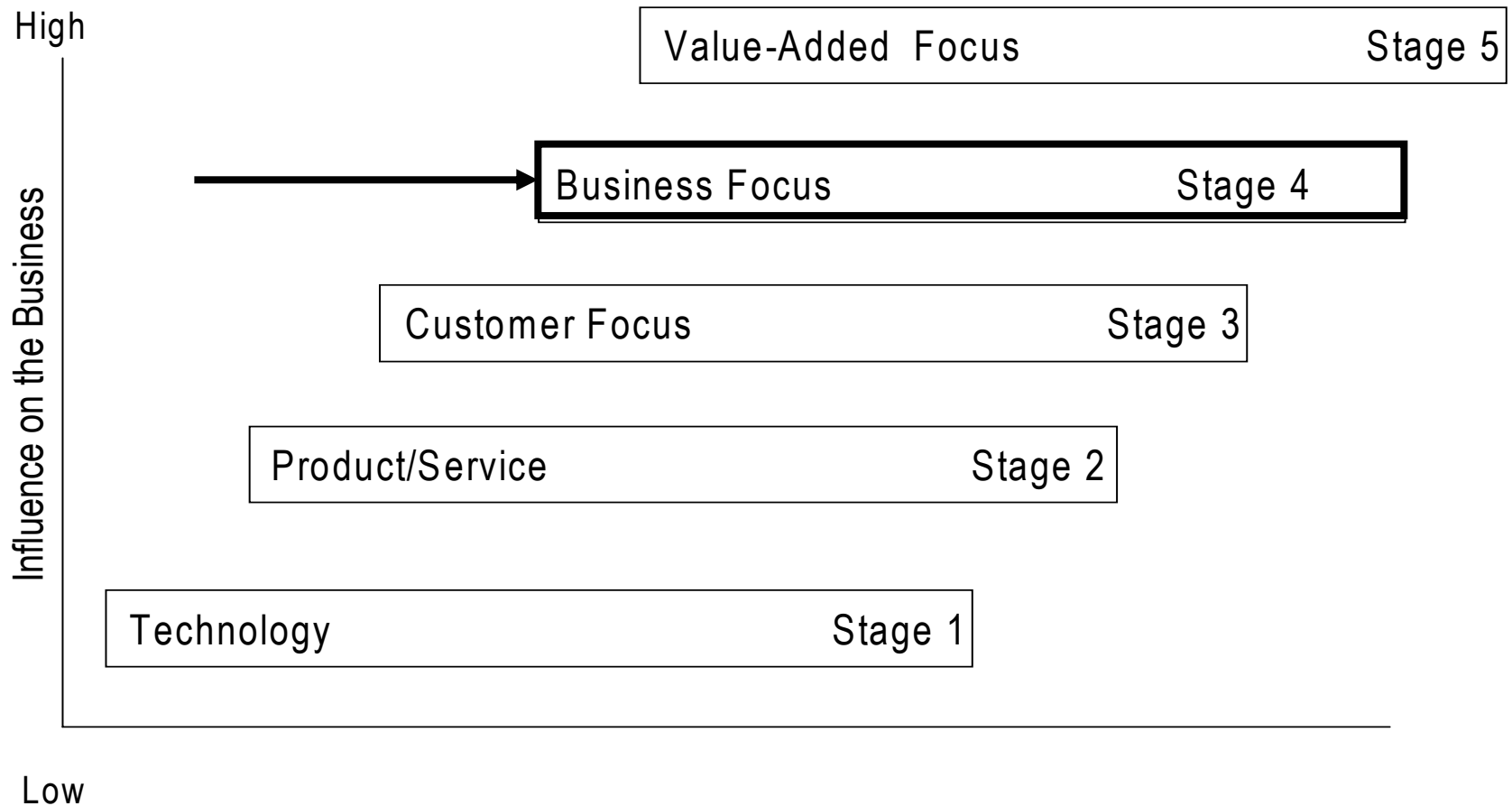
## Technology

Integrated systems and Service Management platforms, manageability built into technology designs and solutions. Operational requirements defined for handover into production environment.

## Culture

Customer satisfaction.

# Organizational Maturity



# Business Focus – Stage 4

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## Vision and strategy

IT is seen as a partner to the business. IT demonstrates strategy realization for the business. IT strategy input to business strategy making process.

## Steering

IT strategic goals, IT proposals made and discussed at board level. Business priority and risk assessments of investing and not investing in IT. Service levels are defined more in business terms, such as 'business transactions processed', 'availability of business functionality'.

# Business Focus – Stage 4 (2)

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## Processes

Business and IT-alignment processes. Strong Integration between Systems development and IT Service Management processes.

Processes deliver 'dashboard steering information'. Service delivery and support processes integrated. Delivery processes deliver sound planning and advice to the business.

# Business Focus – Stage 4 <sup>(3)</sup>

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## People

Business intelligence and business competencies.  
CIO role and CTO role. Equal roles in business and IT.

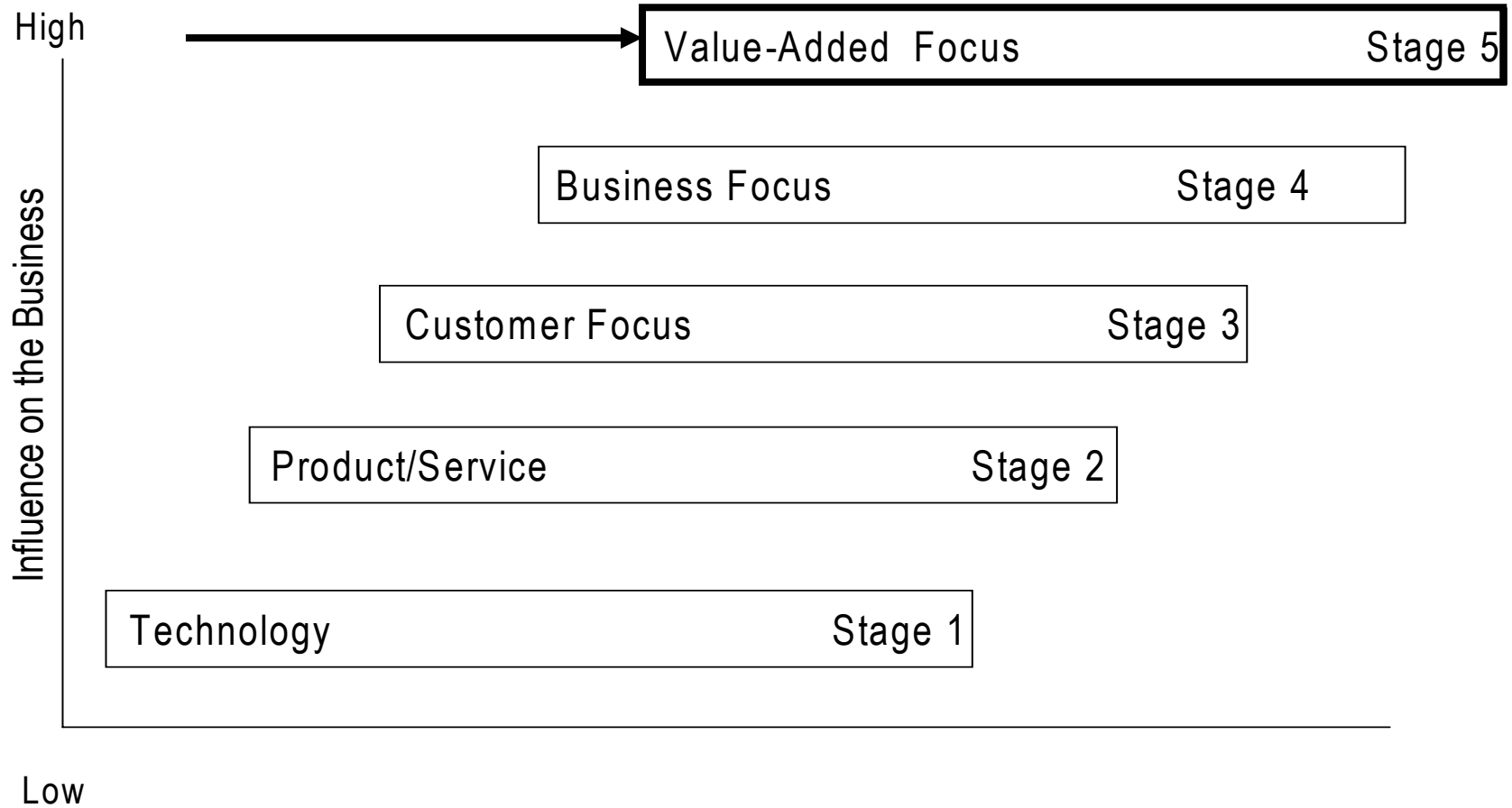
## Technology

R and D and technology pilots. An enterprise-wide management framework exists defining integrated service and systems management toolsets.

## Culture

The IT Organization provides help and advice to the business.

# Organizational Maturity



# Value Chain – Stage 5

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## Vision and strategy

IT is seen as business enabler. IT helps shape and drive business Change and is seen as a value-added partner that helps determine business strategy.

## Steering

IT is steered on added value to the business.  
Business improvements through use of IT.

## Processes

Business and IT strategy making. The IT organization ensures seamless integration with systems development and all other IT suppliers in the value chain to manage real end-to-end services for the business.

# Value Chain – Stage 5 <sup>(2)</sup>

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## People

Strategy making, business planning,  
managing partners and suppliers.  
Infrastructure Integrators.

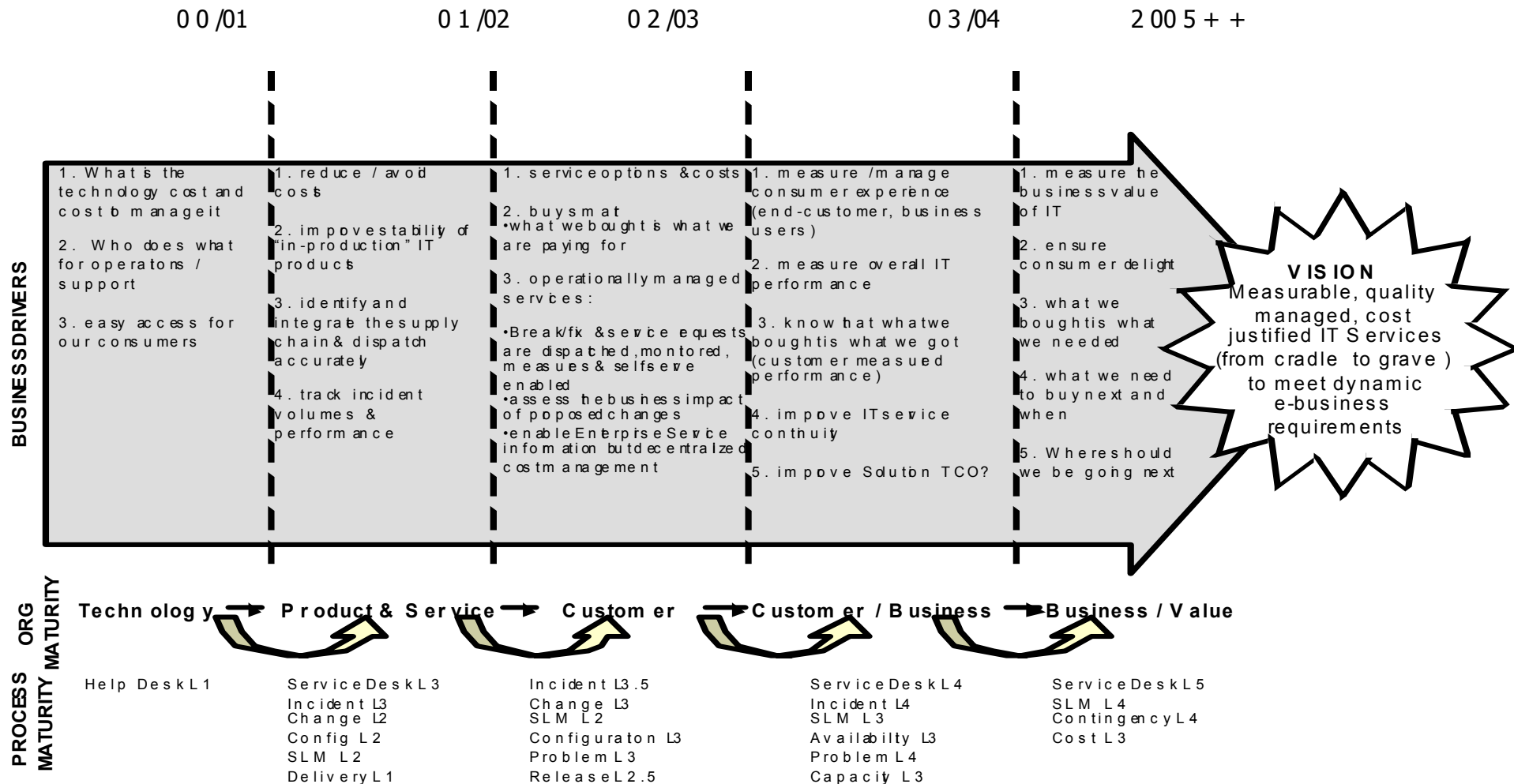
## Technology

Technology interaction between suppliers.  
Solutions integration.

## Culture

The IT Organization enables the business.

# “Service Management Program Status”



# The Next Frontier

## *- Enhancing Service Level Management -*

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### **FROM**

- Identified component services in quasi english
- Measured components
- Focused on break/fix Fisher Price metrics
- 'One-size-fits-all' service levels
- 'After the fact', 'will fix it next time' reporting
- Annual report cards on services

### **TO**

- Services described so your mother could order
- Measure end-to-end service
- Select customer desired key performance indicators
- Varied service level and customer choice
- Real time monitoring for real time 'action'
- Real time report card with 'service' metrics (volume & performance) -- easy to understand & customer friendly

# Current Challenges

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Don't have adequate management of services and collection of information to:

- Demonstrate business value of IT investments
- Accurately predict the costs/service levels of potential solutions (business case development)
- Identify/Respond to service cost rationalization requests
- Manage customers' service experience, nor report on delivered services costs
- Provide targeted IT business views nor demonstrate the performance or value of IT services

# Is There A Silver Bullet!

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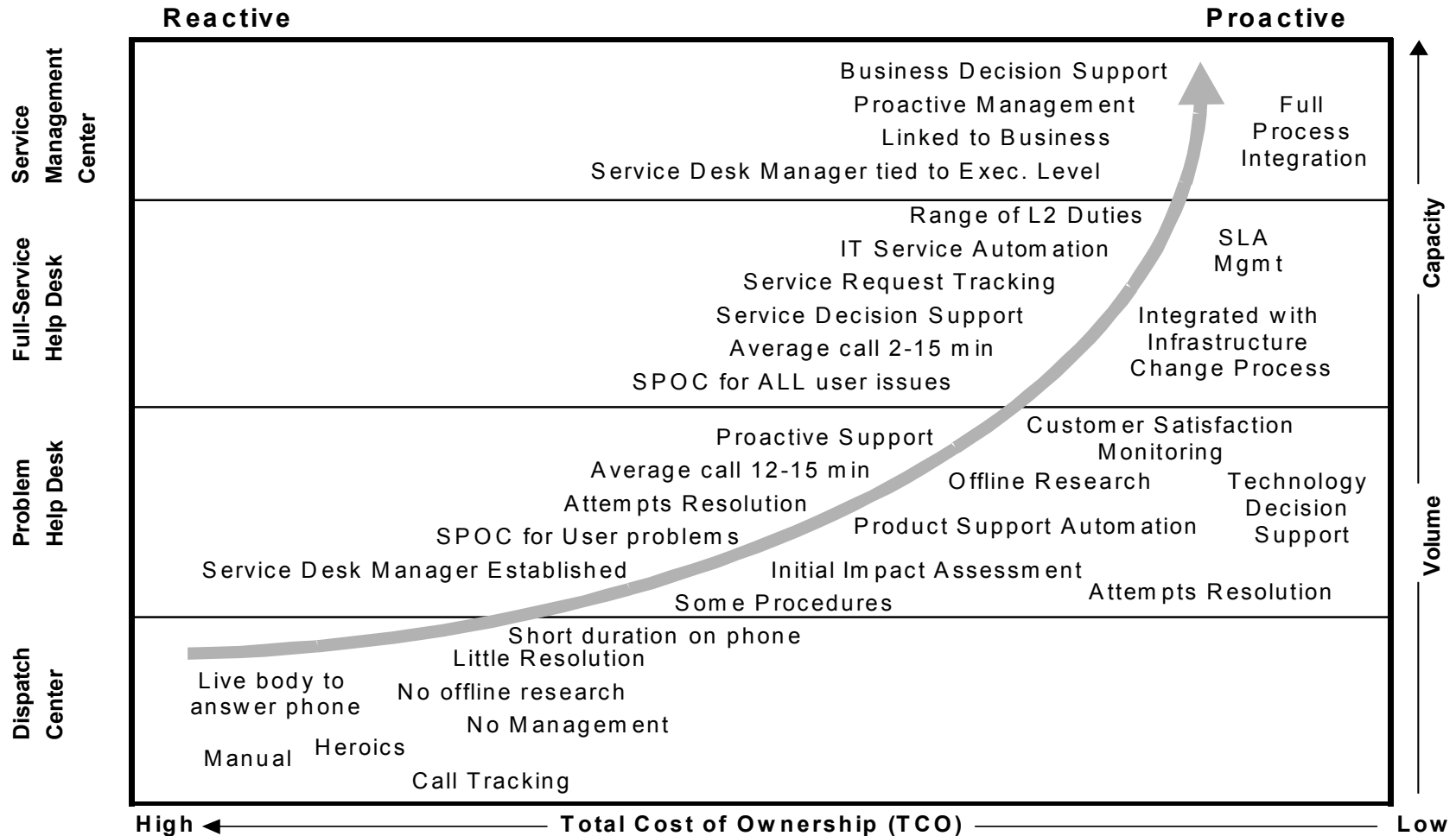
No, but there is a solid opportunity to leap forward by taking advantage of existing capability and investment to transition to a more value-driven delivery model.....Value-Zone Ready

# The Service Desk “Value-Zone”

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- What's the value zone & where are we now?
- What's the difference and what will I really get?
- What's it take to get there?

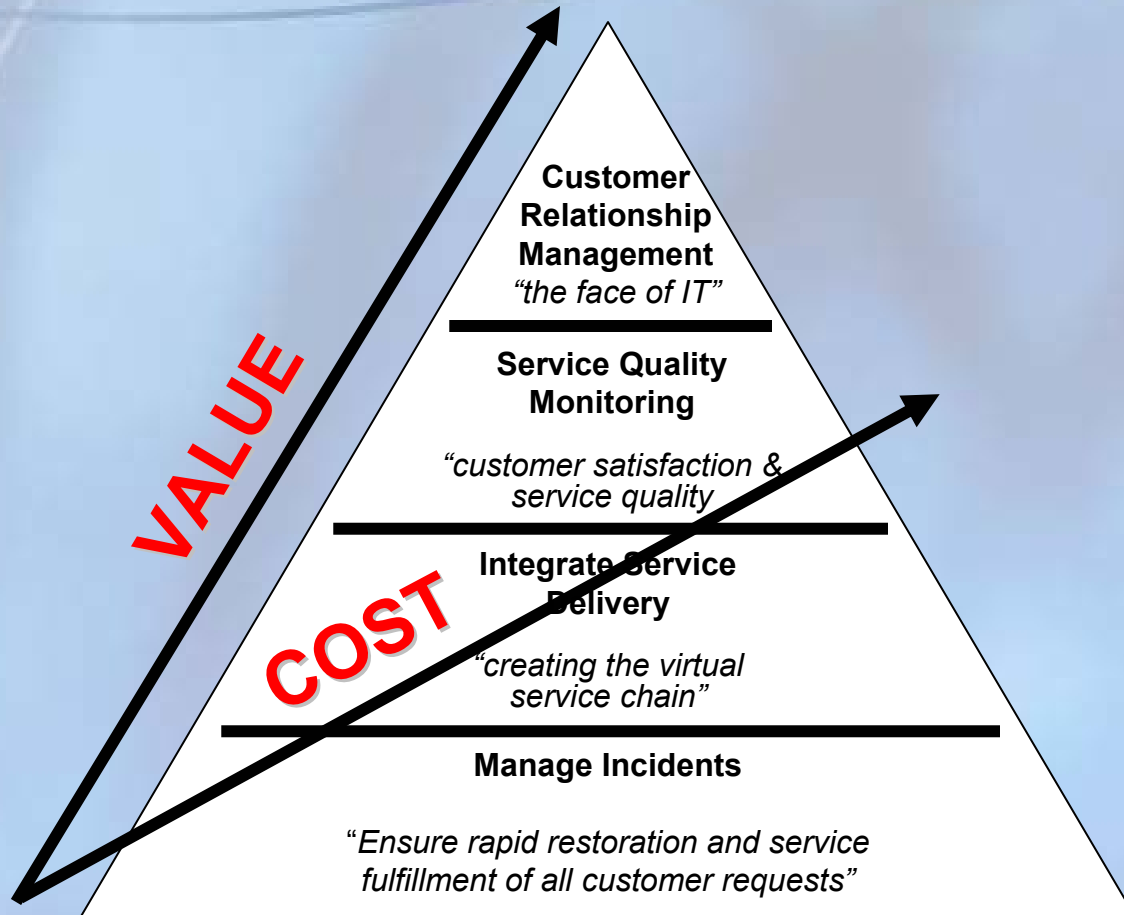
# Service Desk vs. Service Management Activities



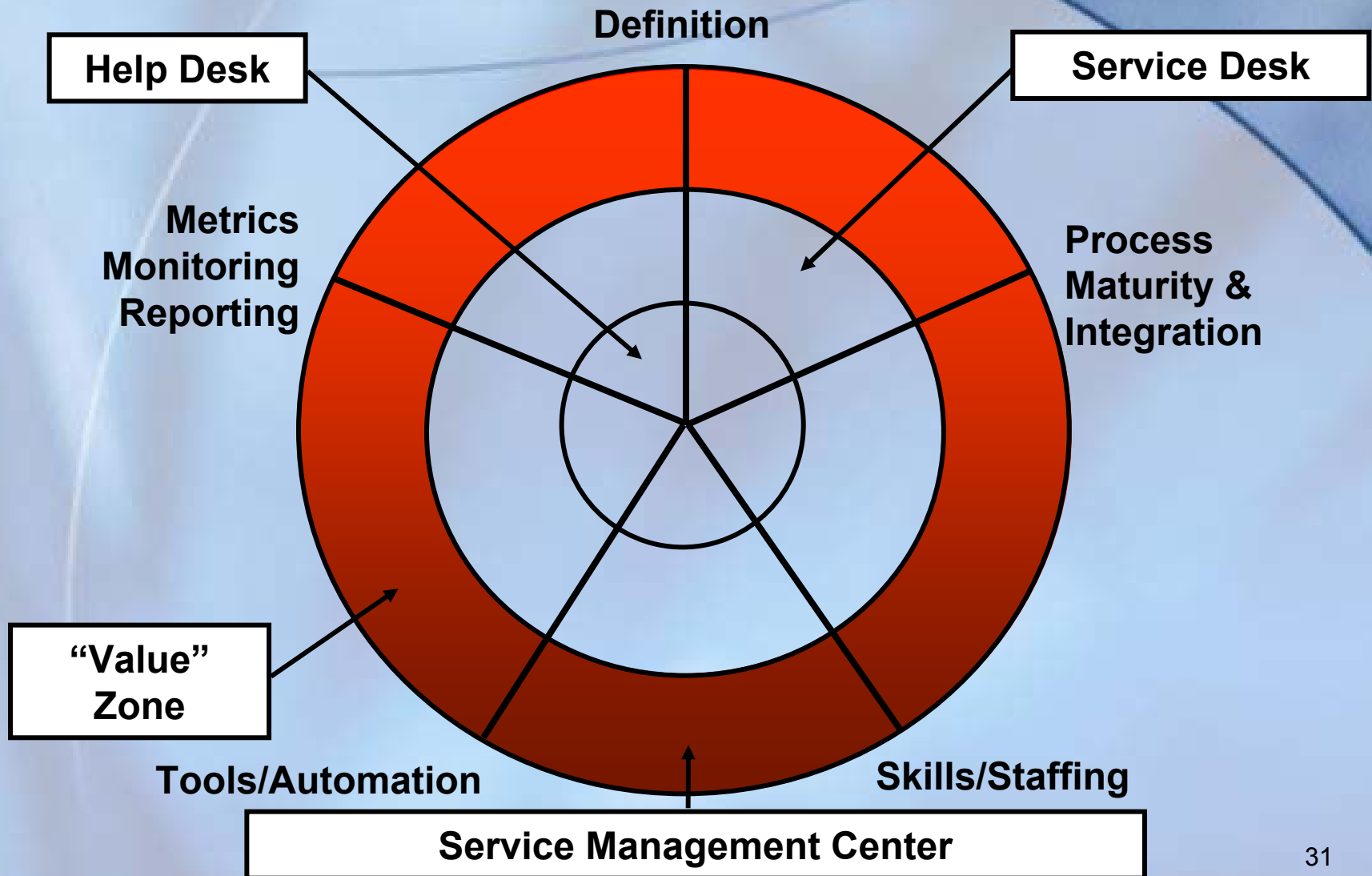
# Service Center Key Activities

## “Value-Based”

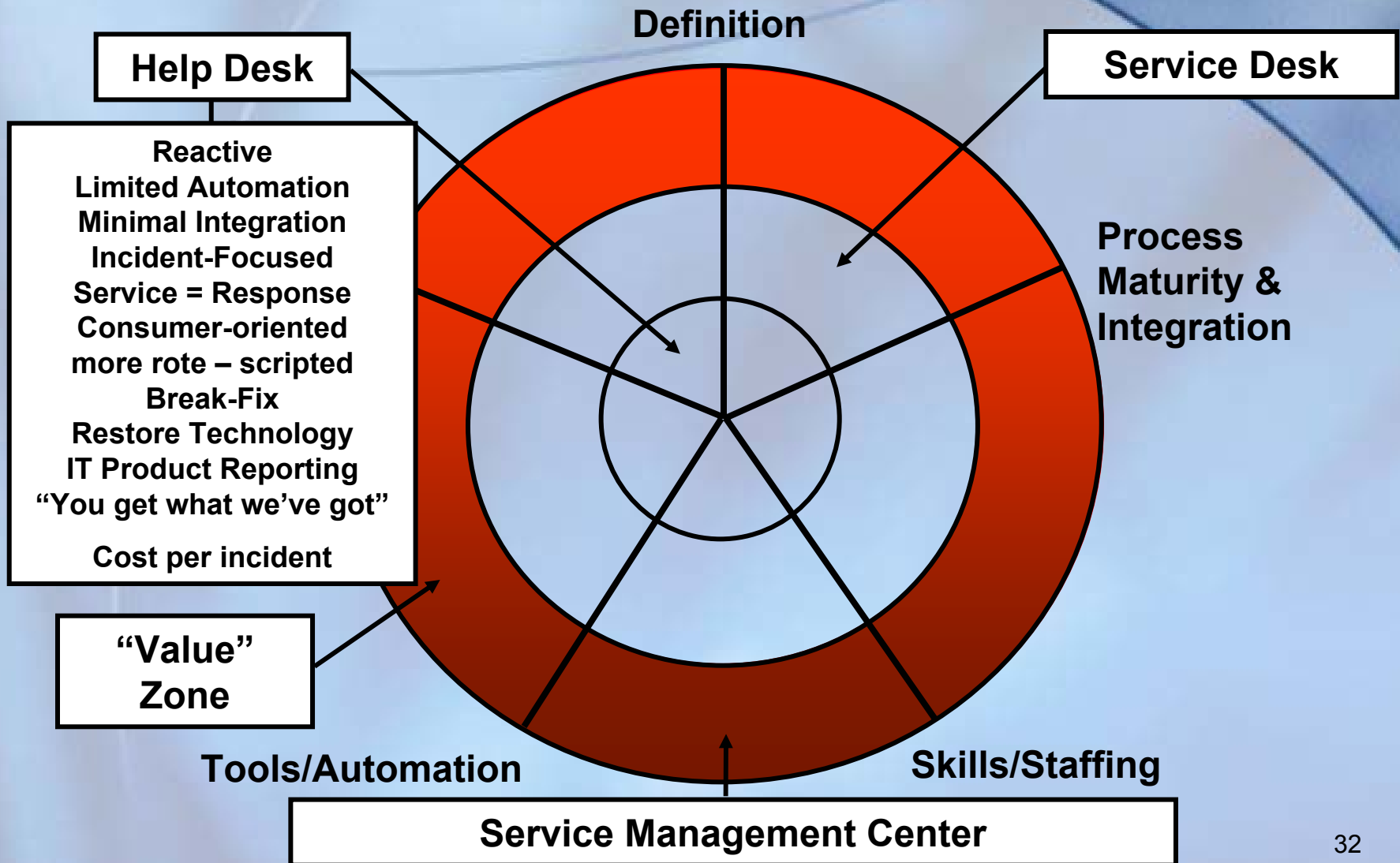
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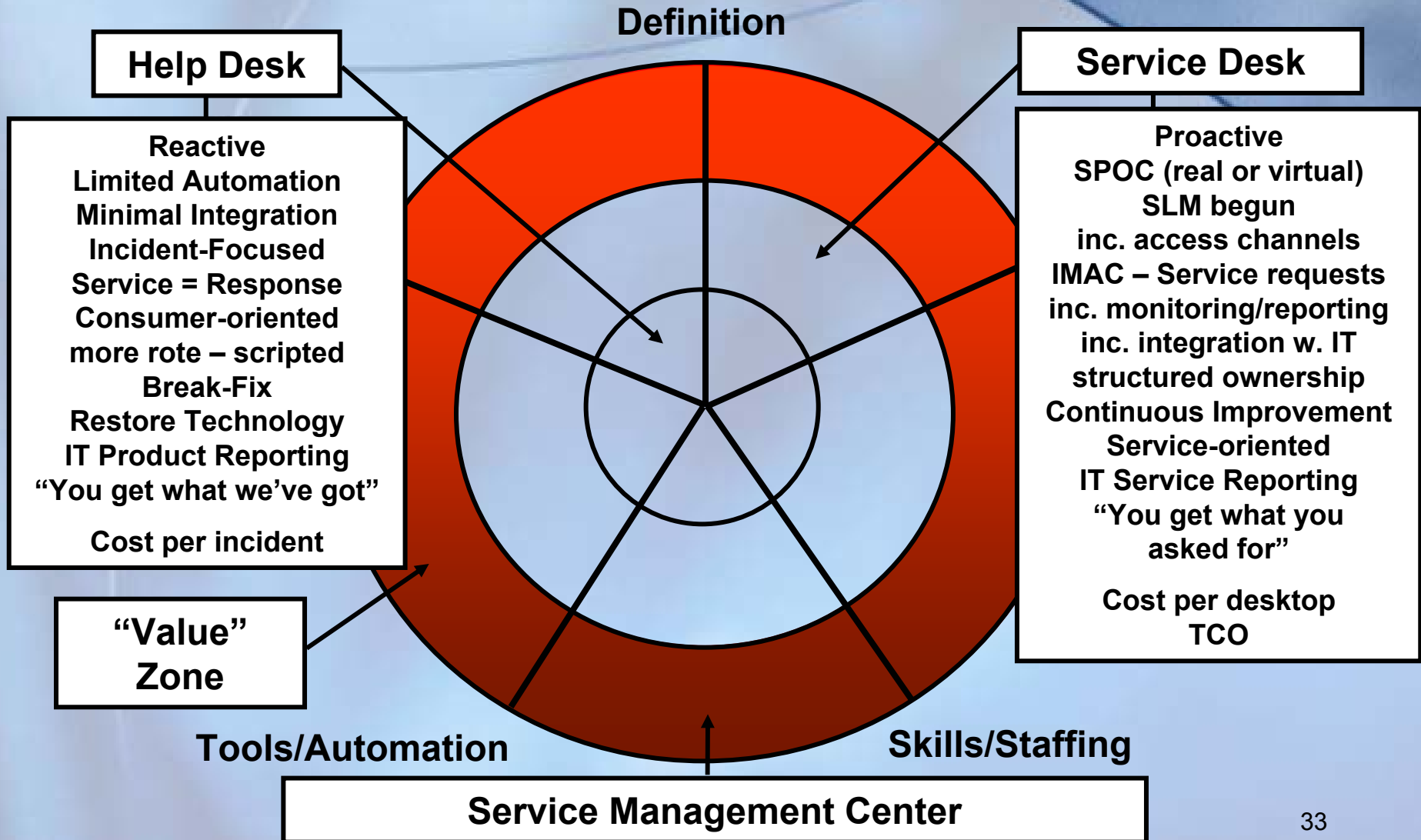
# Service Desk Maturity Levels



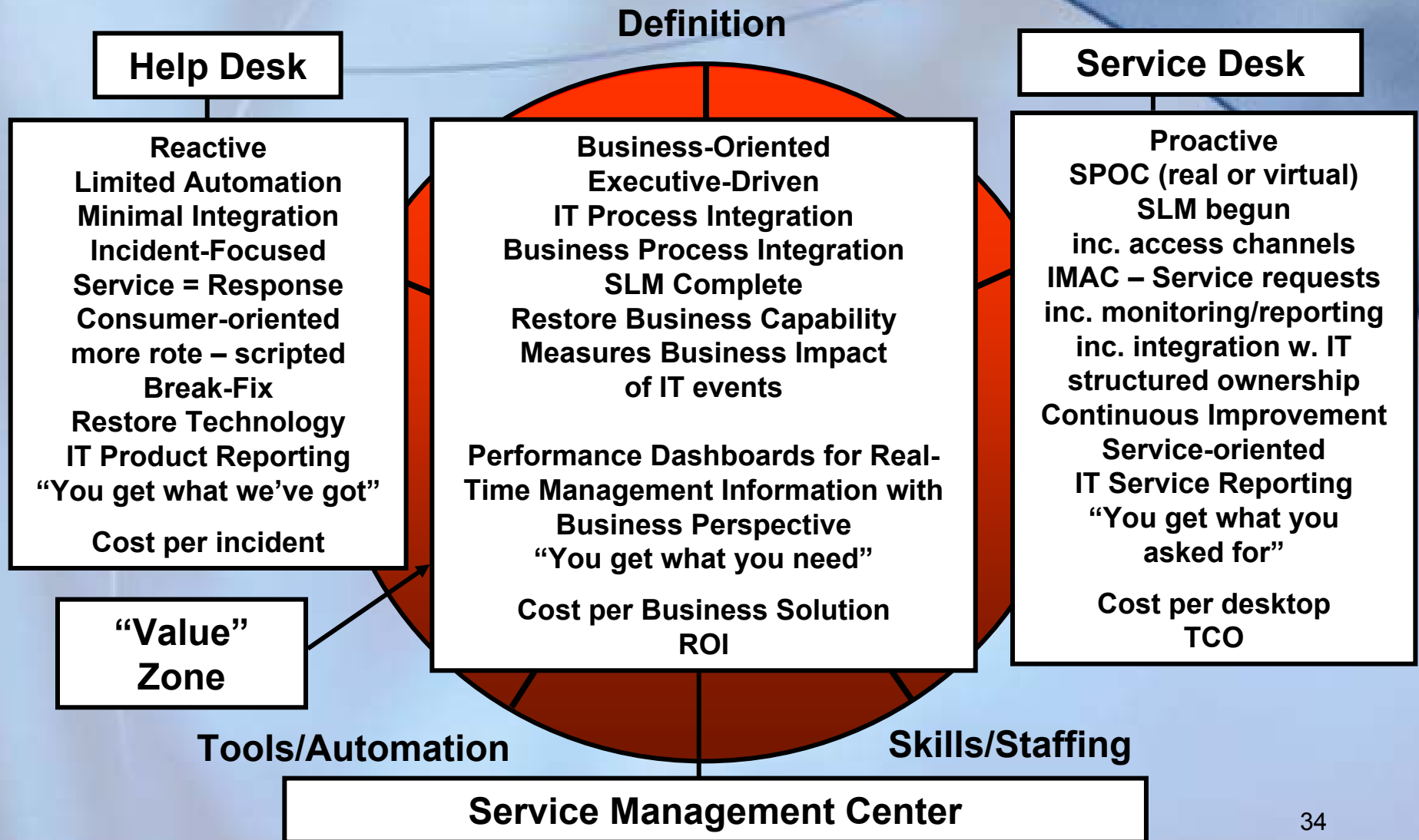
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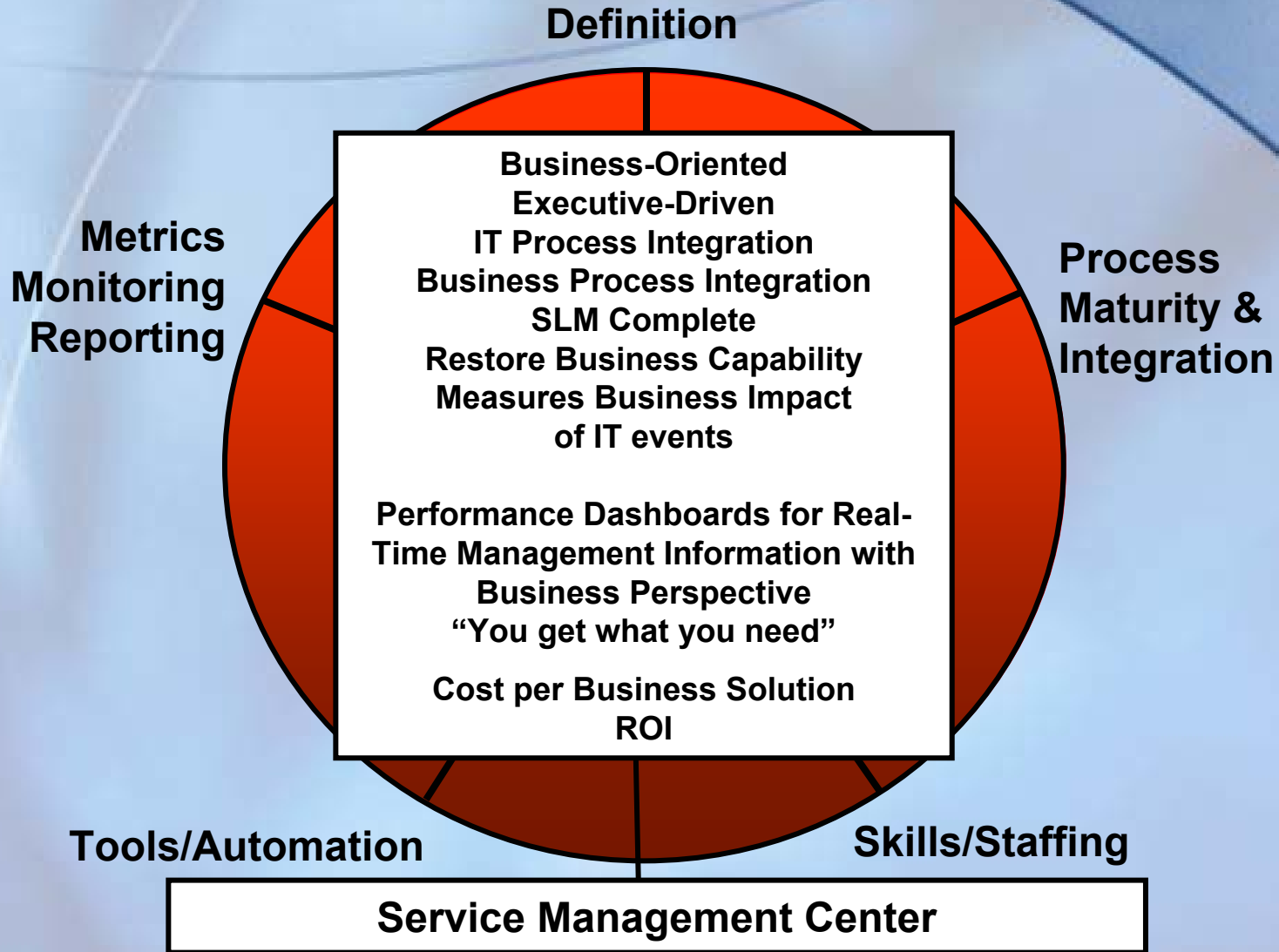
# Service Desk Maturity Levels



# Service Desk Maturity Levels

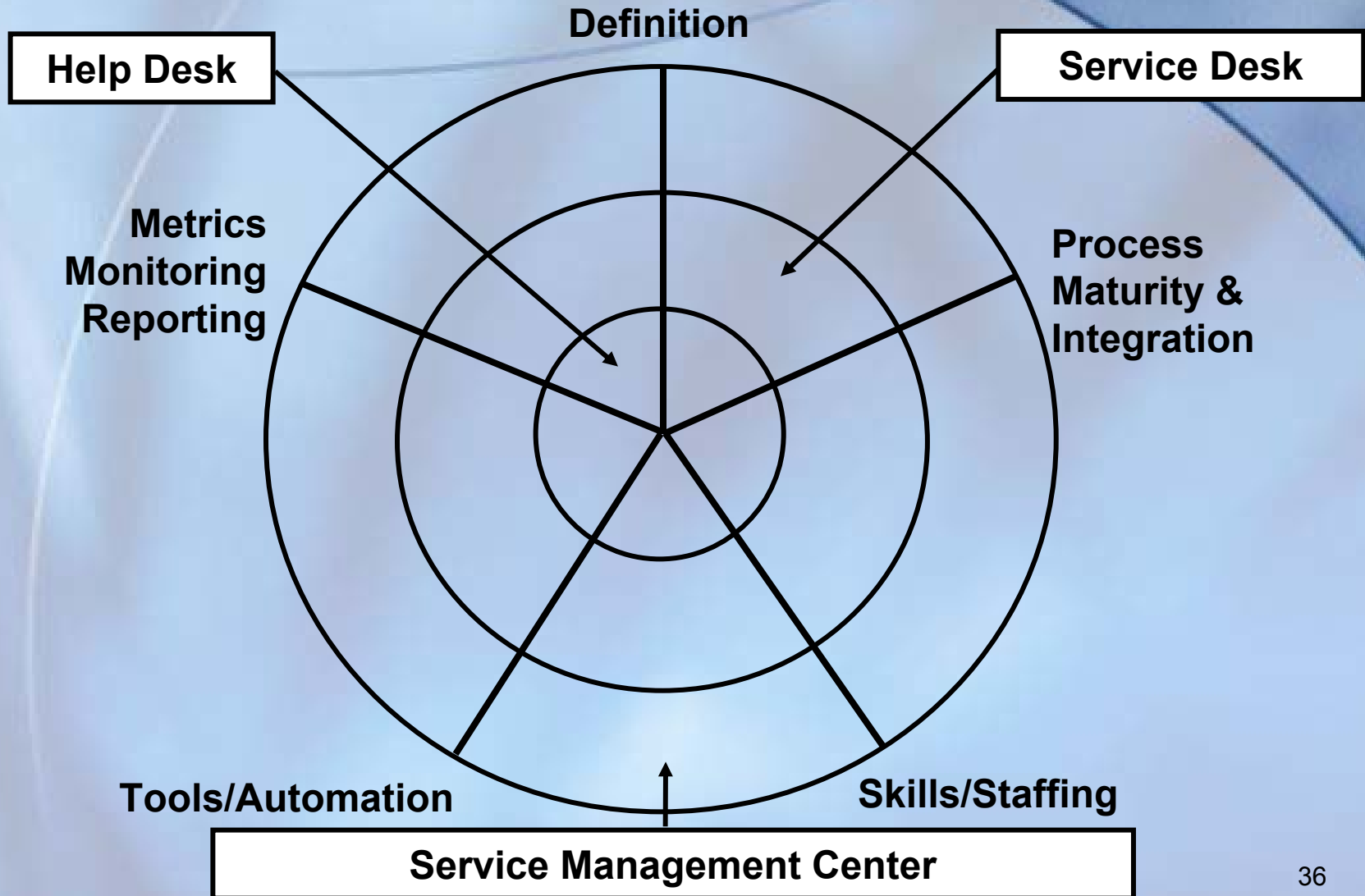


# The "Value" Zone



# Service Desk Maturity Levels

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# Definition

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## Help Desk

Goal: service the end-user; quick restoration of service

- Reactive // limited automation
- minimal integration with other IT processes // stand-alone
- incident-focused
- service levels = severity levels = response times
- Knowledge Base of consumer issues
- more rote – more scripted, routine, less flexibility for staff
- Consumer-oriented
- Break-Fix // Restore Technology
- IT Product Reporting
- “You get what we’ve got”

Measure: Cost per incident

# Definition

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## Service Desk

Goal: Departmental mgmt. TCO, service provider, internal mgmt. practices more structured & rigorous

- SPOC (real or virtual) // more access channels
- IMAC – Service requests
- more monitoring // more reporting // IT Service Reporting
- more integration with other IT processes (e.g. participates in CAB, etc.)
- more structured ownership and escalation procedures (analyst / tier 2)
- Structured communication plan
- Knowledge Base = process/protocols/procedures maintained at this level
- Continuous/systemic quality improvement activities, i.e. analyst coaching
- Service Level Management begun (Level 2/3) // Service-oriented
- “You get what you asked for”

Measure: Cost per Desktop (TCO)

# Definition

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## **Service Management Center**

### Strategic Integration of IT and Business Processes

- Organization
  - ⑥ SMC Leadership reports to (or is) Senior level mgmt.can impact/influence
    - ⑥ Strategy / vision / budget / resources / priorities / objectives / goals
  - ⑥ Accountability Relationship
    - ⑥ Senior process owners (incident, problem, change, config, SLM) must report to (or have an accountability relationship) to the SMC Director
- Business-Oriented // Executive-Driven
- IT (ITIL) Process Integration // Significant IT / Business Process Integration
- Service Level Management Complete (Level 4/5)
- Restore Business Capability // Measures Business Impact of IT events
- Performance Dashboards for Real-Time Management Information
- “You get what you need”

Measure: Cost per Business Solution (ROI)

# Process Maturity & Integration

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## **Help Desk**

- Technology cost and cost to manage it
- Who does what for operations / support
- Easy access for our consumers

# Process Maturity & Integration

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## **Service Desk**

- reduce / avoid costs
- improve stability of “in-production” IT products
- identify and integrate the supply chain & dispatch
- track incident volumes & service performance
- service options & costs // buy smart
- what we bought is what we are paying for
- operationally managed services
- Break/fix & service requests are dispatched, monitored, measures & self-serve enabled
- assess the business impact of proposed changes

# Process Maturity & Integration (SMC)

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## **Incident**

- Cost to the Business // Business Impact
- Projected impact on Program Delivery
- Customer Delight
- Impact of programmatic delivery reductions on the bus.
- SMC plays role in business incidents, i.e. procedural support, activation of business contingency, etc.

## **Problem**

- Cost to the Business // Programmatic impact (FUD)
- Cost justification for root cause analysis
- Track Problems against CI's // track RFC's with change<sub>42</sub>

# Process Maturity & Integration (SMC)

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## Change

Before:

- Estimated Cost of Implementation
- Risk Assessment
- Potential Benefits

After:

- Post Implementation Review
- True Cost of Implementation
- Real Benefits Achieved vs. Risk
- Incidents linked to change
- Cost of incidents created by change

# Process Maturity & Integration (SMC)

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## **Service Level Management**

- Need end-to-end service chain information for reporting and monitoring service levels (start to finish) internal and external service providers
- exception remediation
- consulting recommendations
- SLM must exist (is a natural output of your service definition and service provisioning process and use business case service levels (ROI) translated into IT measures and can roll up into actionable information.)

# Process Maturity & Integration (SMC)

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## **Service Planning/Lifecycle Model: (business and IT service planning)**

- Business defines what service it wants (opportunity) or what business or program capability they need to meet programmatic issues/challenges.
- Use re-usable models / modules / services that already exist
- Ensure service can be operationally managed because relationship of roles can be measured and monitored
- Capture information by customer, provider and Enterprise (roll-up). Tools, (use to create SLA and identify KPI...creates scorecards, dashboards, etc.)
- Information made available (rapid actionable management information) Web dashboards

# Metrics, Monitoring & Reporting

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## **Metrics:**

### **Help Desk**

- daily & weekly reporting -- stats: focused on incident information mainly. call volumes, access, modes, ATA, first call resolution, abandon rate, etc.
- serious issues -- focused, chaos, very operationally focused.
- measure customer satisfaction by incident

# Metrics, Monitoring & Reporting

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## **Metrics:**

### **Service Desk**

- Focus expands to include service request information, some service metrics, information leads to more questions because of awareness by others
- May start to monitor some end-to-end for services / incidents within organizations control
- canned, prescribed metrics....demonstrate if met service level.
- TCO, cost per desktop
- measure customer satisfaction by service

# Metrics, Monitoring & Reporting

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## **Metrics:**

### **Service Management Center**

- Focus is to business impacts and impacts to program delivery, costs, etc. (more cost per transaction, ROI focus).
- detailed to transaction level, i.e. business transaction and impact of IT availability
- measure customer satisfaction by program
- Expect increased demand from business for customized reporting

# Metrics, Monitoring & Reporting

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## **Monitoring**

### **Help Desk**

- Monitoring is internally focused on help desk performance and operations, i.e. open calls, FPOC, basic volumes of inquiries, etc.

# Metrics, Monitoring & Reporting

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## **Monitoring Service Desk**

- Begin to monitor service levels as they exist.
- Desk begins to play role in incident coordination for the enterprise across service providers, notifications, escalations.
- increased sophistication around incident management and status
- begin to identify repetitive incidents and some incident matching for root cause analysis

# Metrics, Monitoring & Reporting

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## **Monitoring**

### **Service Management Center**

- SMC plays alert role prior to SLA breach becoming more proactive internally
- specialized monitoring of specific high priority incidents or protocols, i.e. on-demand monitoring, operational cap...
- Real-time feed from data sources, real time / automated analysis, quick turnaround of information
- Highly developed understanding of business environment and goals, etc.
- Very educated in what business does and why important

# Metrics Monitoring & Reporting

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## **Communication (Reporting)**

### **Help Desk**

- Internally, operationally focused on daily activities, help desk activities, operational management is audience, may be some to IT management as awareness building.

# Metrics Monitoring & Reporting

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## Communication (Reporting)

### Service Desk

- more communication internally (staff musters, shift handoffs, learning events, briefings, more automated real time information to analysts e.g. whiteboards, readerboards, cue information etc.
- more communication with service providers (proactive notification) re: service levels and status of incidents / service requests
- more communication with clients // critical notification
- Audience shifts to payers of service / customer as well as Sr. IT management

# Metrics, Monitoring & Reporting

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## **Communication (Reporting)**

### **Service Management Center**

- Focus to provide timely, accurate, actionable information for decision support.
- Communication strategy includes Enterprise level view of impacts with drill down capability to level of detail required, i.e., business unit vs. Enterprise
- Real-time focus or JIT delivery of key information
- Available through Business Intelligence tools and analysis tools, dashboards, scorecards, web, more agile/ customizable for different types of analysis
- connects dots between IT and business in business terms.
- IT identifies the business impacted and notifies line of business management of business incident

# Tools & Automation

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## **Help Desk**

- basic helpdesk tools, incident tool, telephony, etc.
- may be multiple tools in use
- limited tool integration (telephony, CMDB, etc.)
- functionality focuses on incident
- dispatch capability
- limited knowledge base
- tie in with individual user records, history of incidents/calls to user

# Tools & Automation

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## Service Desk

- tool requirements include service requests, time tracking, and include service levels by business unit or customer
- flag customer traits or characteristics, i.e. executive offices
- incident matching // problem management
- integration with change and incident management
- service chain (virtual) uses one or common tool or bridge
- integrated with CMDB
- automated service desk policies, procedures, searchable, available to service chain (web)
- escalation capability, integrated with notification (paging etc.)
- IT-focused BI capability to manage IT service
- Awareness builds of BI capability and power of metrics

# Tools & Automation

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## **Service Management Center**

- tool requirements and service management req. for vendors and service partners are understood and documented so they can be included in RFP and selection processes.
- BI capability includes business metrics, analysis with IT metrics and produces actionable decision support information
- Real-time customized to business unit or issue
- scenario capability for projections and planning
- modular for quick customization
- reporting requirements are part of service design process and are defined as service is developed
- analysis capability distributed to those who need it.... i.e. business units can do own data mining
- ability to rec. real time feeds from all data sources.

# Skills & Staffing

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## Help Desk

- management that is operationally-focused, focus on customer service and basic process
- core competencies in basic management, HR, customer service
- measurement of success is on meeting or exceeding helpdesk metrics around call, etc.
- management is usually more junior and may not be part of Sr. strategic management team
- analysts who follow procedures, more customer service focus vs. highly technical
- management focus on supervision and following order

# Skills & Staffing

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## Service Desk

- Management needs to be engaged in strategy development and establishment of goals, objectives
- Managers need to have increasing analytical skills, i.e. analysis of increasingly complex and diverse information
- need to be "data / metrics-driven", ID trends, implement changes in process as result, very process-oriented
- management focus on leading and defining process, operational practices, continuous improvement, etc.
- May be multi-level of "management" in the service desk, i.e. team lead, manager -- increased empowerment
- staff need to be multi-tasking, change ready and accept change and process changes easily
- Staff has more flexibility, needs more mature judgment, knowledge of business environments

# Skills & Staffing

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## **Service Management Center**

- Manager of SMC needs to part of executive team, positioned to access & influence decision makers (\$\$\$)
- Strategic SMC thinking and implementation of over time.... years... ongoing
- Business acumen competency -- understands links of financial, program and operational impacts of service and business that they serve.
- Sr. process owners need to report or have an operational accountability relationship to the SMC Mgr.
- Staff need increasingly more analytical skills. See big picture, analyze, skills to use Business analysis tools

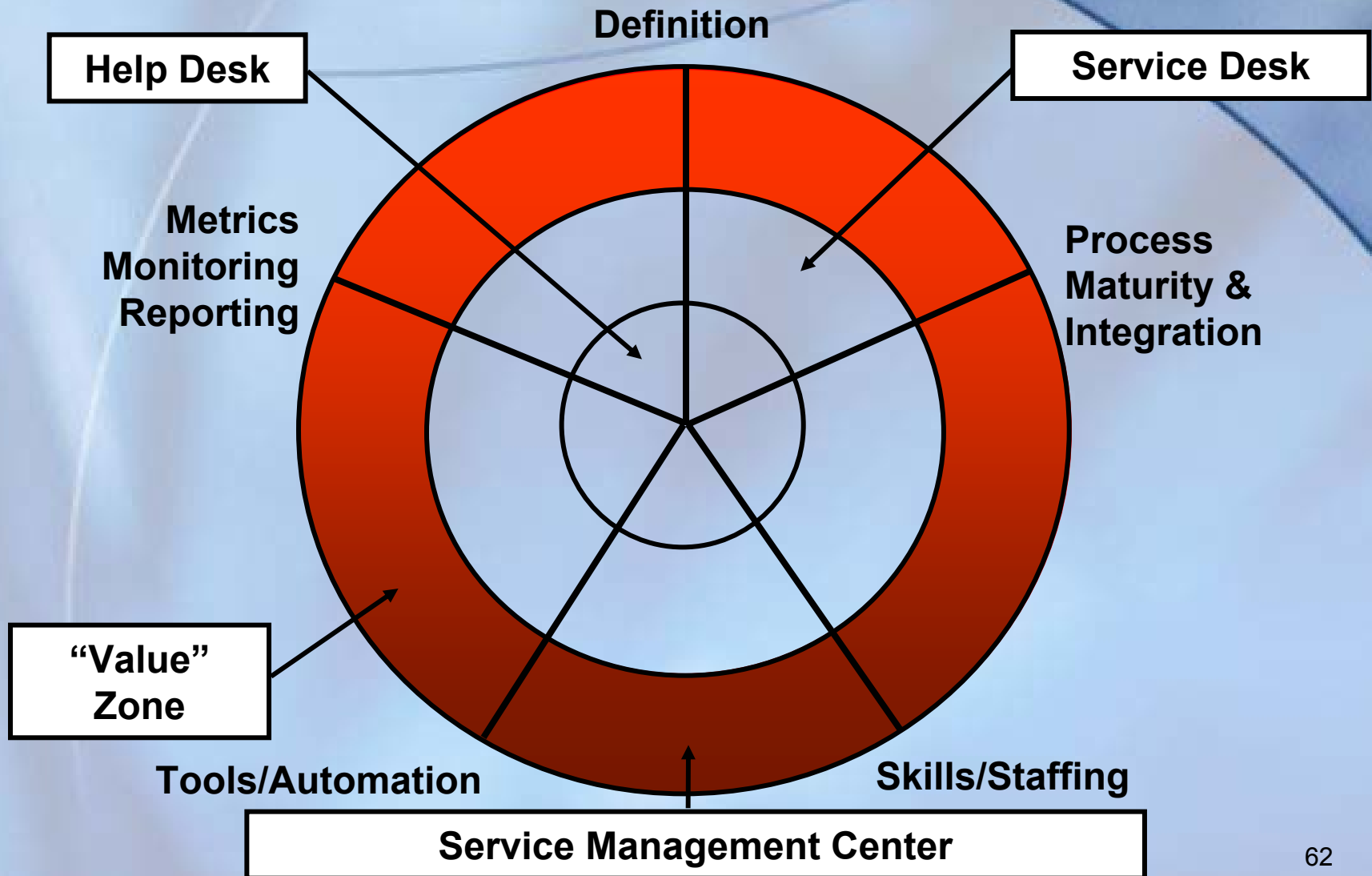
# Skills & Staffing

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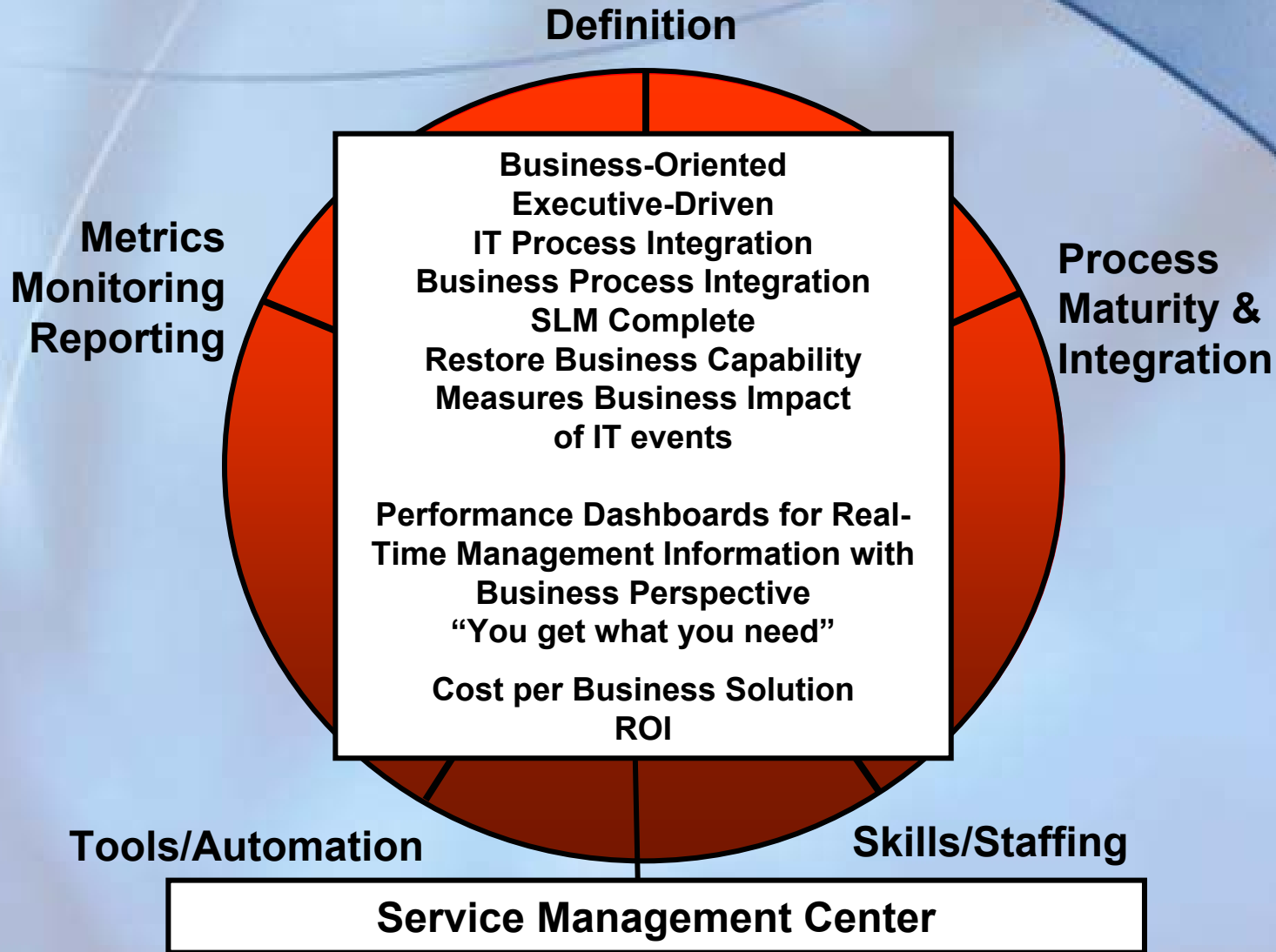
## **Service Management Center**

- Staff must be able to connect the dots between incident->service->program impact
- Require higher level of judgment skills
- shift from technical analyst to business analyst, -  
- repetitive incidents drastically reduced.
- impact and influencing skills to interact with service providers and process owners to do service, problem, etc. coordination...

# Service Desk Maturity Levels



# The "Value" Zone



# Thank You!

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