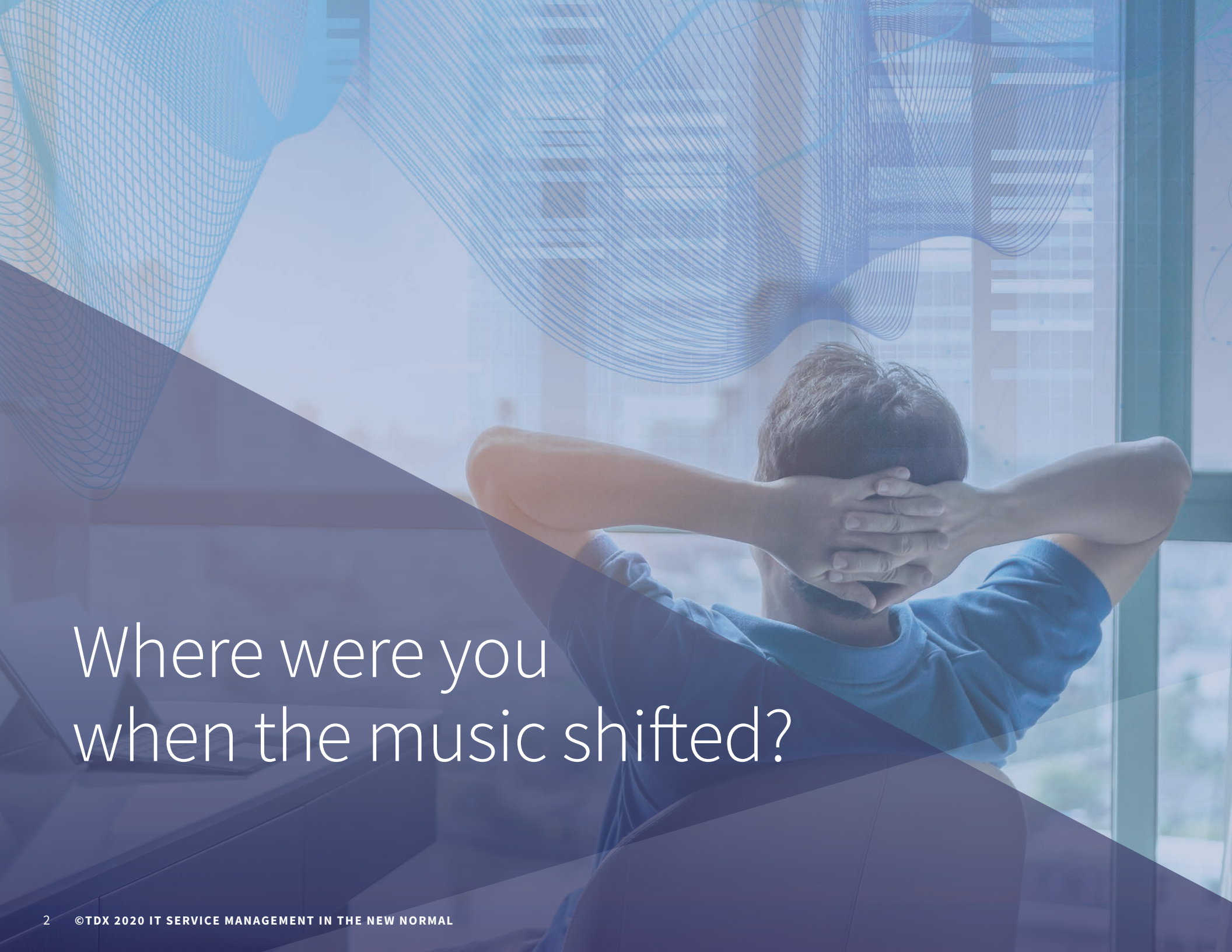




IT SERVICE MANAGEMENT

IN THE NEW NORMAL

2020 Pulse Report - Managing the transition to virtual workforces, distance learning, and remote teams.

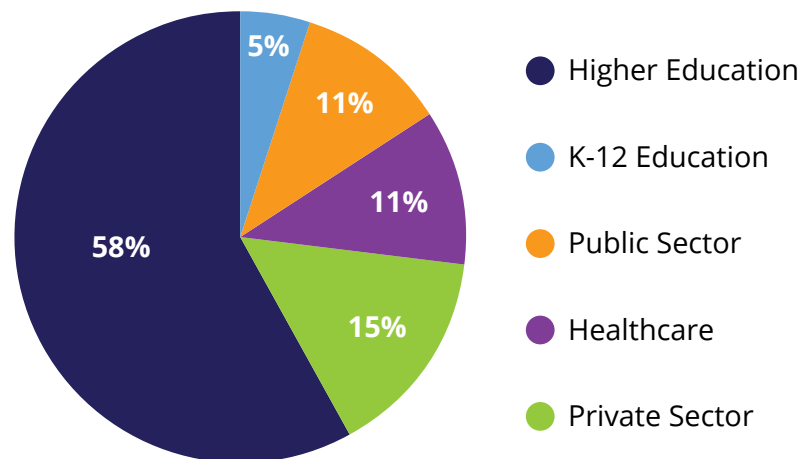
A person with their hands covering their eyes, sitting in front of a window. The image has a blue wireframe overlay and a dark blue diagonal shape in the foreground.

Where were you
when the music shifted?

STUDY SCOPE

An overnight swing to work from home and a mass exodus of campuses across the globe put IT leaders to the test. Business continuity plans were enacted and remote IT support quickly became the norm.

Amongst a sea of uncertainty, we move forward, and as we do, it is important to use this moment in time as tool: what went well & where is there room for improvement? This market study looks at these challenging questions.

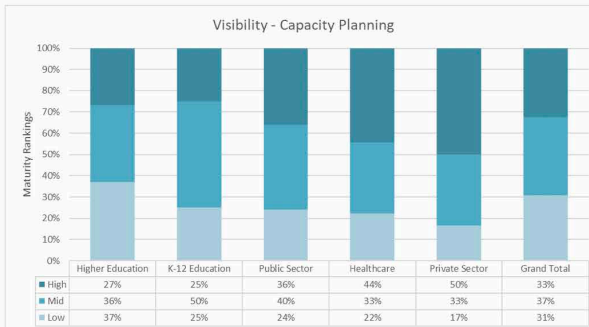
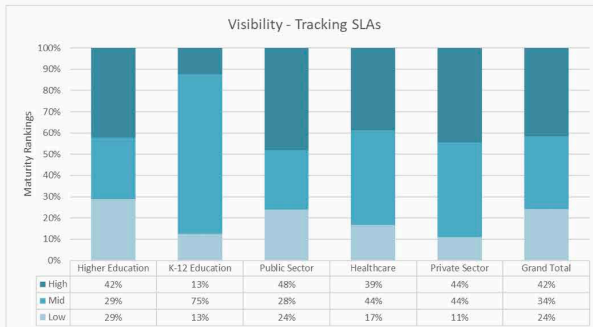


The report contemplates IT maturity and readiness across 5 broad categories: with 166 participants within Higher Education, State & Local Government, Healthcare, K12 Districts and the Private Sector.

Study Scale

The study examines the readiness of each of these sectors and ranks them on a scale of 1 – 6. Those reporting 1,2 were placed in the ‘low’ bucket, those with scores of 3, 4 to the mid range and those with 5, 6 were categorized as highly prepared.





Overnight, the world shifted to work from home (WFH) and distant learning. It was a shining moment for tech as IT Leaders took center stage. In May 2020, a pulse was taken – 166 participants responded to a series of questions looking at what worked and what needs to improve.

IT Leadership shined bright as everyone flipped the switch to WFH and enacted distant learning. **What went well and where do we focus for improvement?**

- 70% - ticketing assignment
- 58% - service catalog in place
- 54% - ability to update project plans
- Ability to quickly pivot the team
- 53% - poor visibility to SLAs.
- 61% - managing project risk.
- 55% - end user portal was not ready
- Cost containment is top of mind

Can IT leaders reduce the strain on their organizations while also managing tightening budgets? The answer is to focus on lowering total cost of ownership - from codeless platforms to enterprise service - a reduced administrative burden and visibility to cloud based data are key priorities.

What key areas will you address as you move forward in the ‘New Normal’?

Total Cost of Ownership / Budget Issues

Platform administration and management can be costly. One key area to contemplate is how easy is to configure and administer your ITSM platform and what exactly does it include? An ITSM platform should not drain your resources – a codeless platform will help mitigate long lead times and overallocation of resources to system admin.

Better Controls & Communication

By enlisting Enterprise Service Management (ESM) together with Project Management, organizations can gain better control over resource time and work output. As resources often balance between ticket and project work, having one screen, one set of dashboards and one platform to manage is key.



“I have my own CIO dashboard. In one look I can see any negative survey and then pivot to look at any project that needs my attention. That’s the wow factor. The pieces coming together in a single pane, for me as a leader to be able to manage and support our organization.”

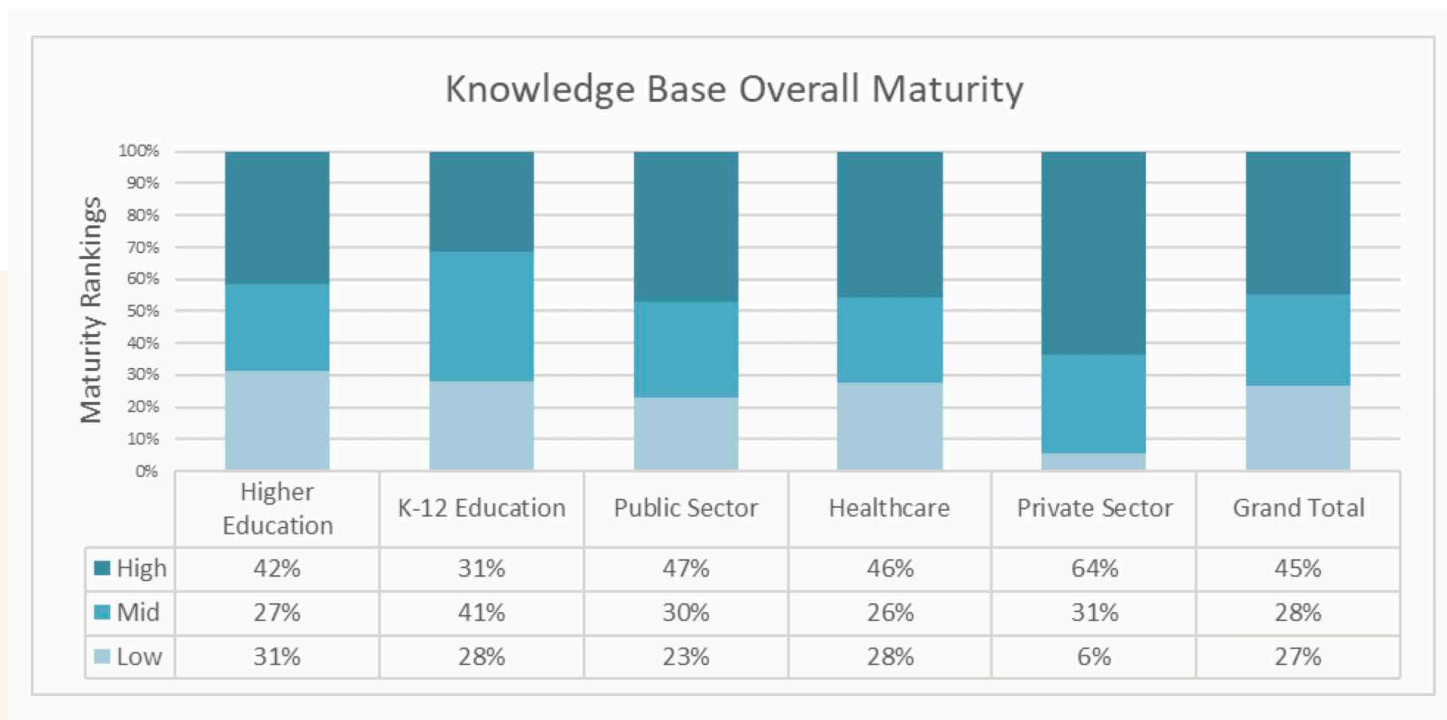
- Frank Fear, CIO, Covenant HealthCare

How ready was your knowledge base?

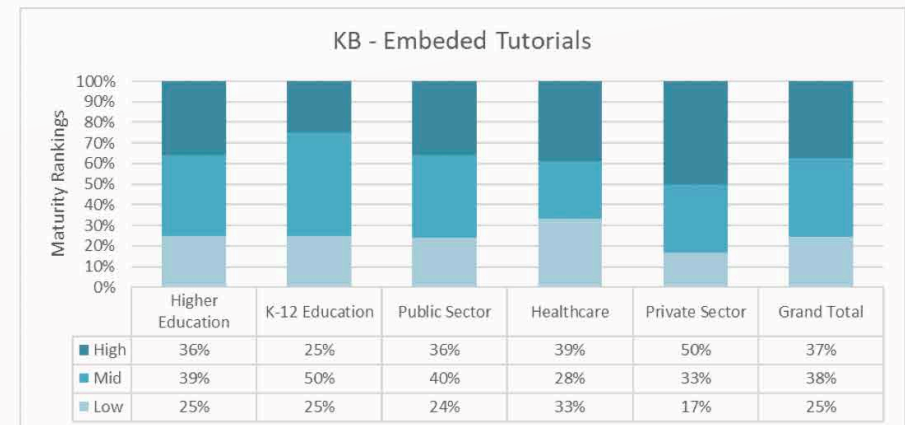
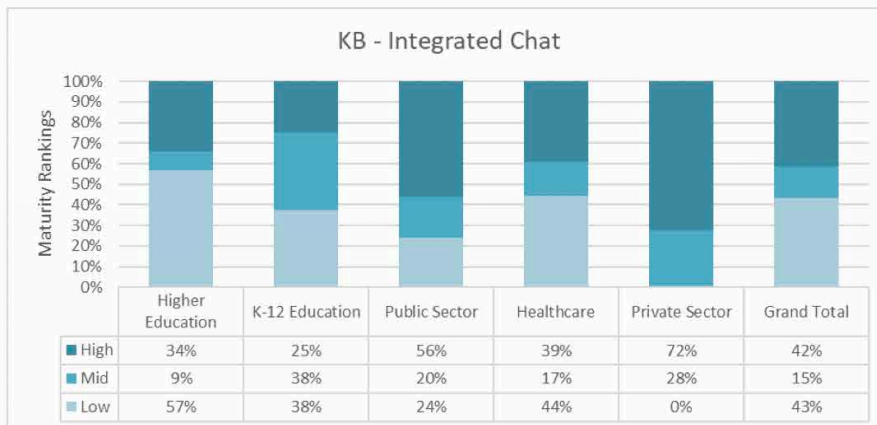
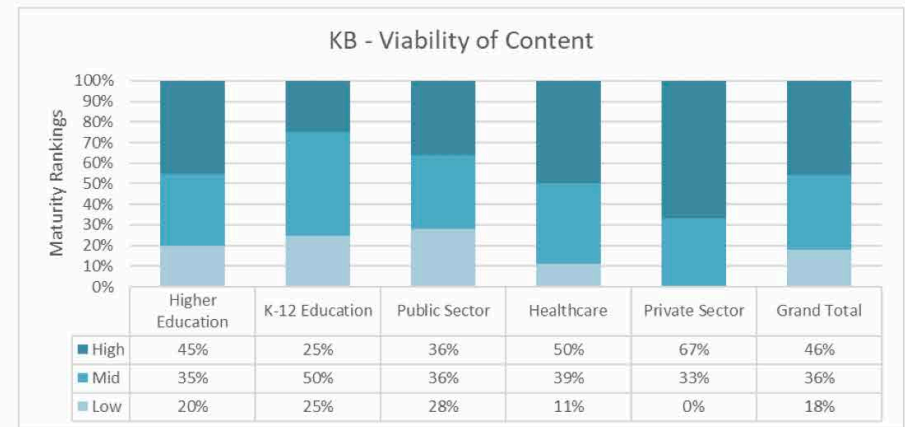
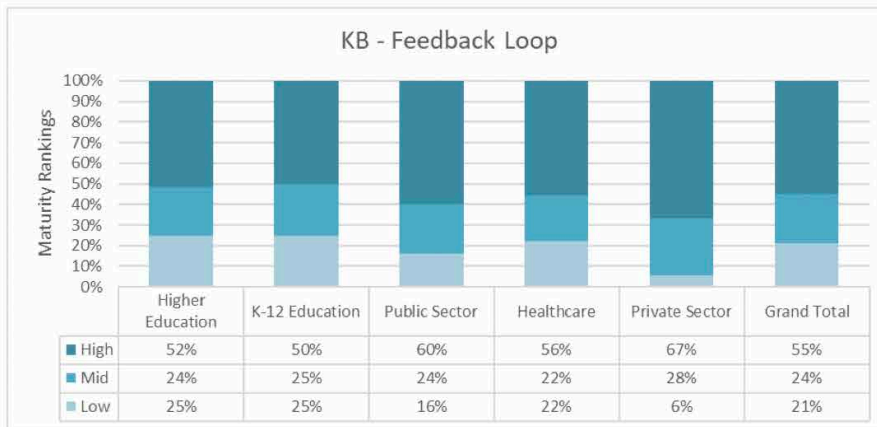


45% were 'highly prepared' with knowledge base content – how can the others improve this area?

When examining across all sectors, 45% of the participants self-ranked to 'highly' prepared to support a remote workforce and distant learning in terms of KB Readiness.. The remaining 55% split between moderately prepared (28%) and entirely unprepared (27%)



How ready was your knowledge base?



Partner with internal resources to enrich your content including online tutorials and video content



Use an integrated chatbot to leverage the content in your knowledge base



Gather input and feedback for Knowledge Centered Service (KCS)



Integrate the KB articles with your ticketing workflow and feedback



Keep content up to date with a refresh cadence



The KB should be easy to search, even on a search engine



5 Pillars to Pairing ITSM & Knowledge-Centered Service

Knowledge-Centered Service (KCS®) can and should be a part of your ITSM playbook as a complementary strategy to self-service. However, launching a KCS style guide initiative can seem like an overwhelming endeavor. Here are five things to focus on to help you get your KCS initiative off the ground.

- 1 Knowledge-Centered Service Base and ITSM Tool Integration:** To fully adopt KCS style guide, your teams must be able to easily and quickly use the KB. Ideally, your knowledge base will be integrated with your ITSM tool so your organization can follow KCS style guide best practices alongside their service management processes.
- 2 Start Small:** Pilot with a small group. You should look to start in an area where KCS style guide will make the most impact. For example, starting in your Service Desk with a handful of Service Desk Analysts is a great start to getting off the ground quickly. Those in the customer service roles will immediately understand the benefit of Knowledge-Centered Service style guide as they will be the first to quickly reap the rewards.
- 3 Don't Try to Boil the Ocean:** Start with a small team – but also start slowly. It is wise to stop yourself from pushing all your existing documentation into the KB try to retrofit it into your new knowledge base. Start following KCS style guide practices with your small pilot team and truly create knowledge on an on-demand basis. A knowledge base is a living entity that will always be changing and adapting.
- 4 Get Trained in Knowledge-Centered Service:** There are a lot of free and paid resources out there to guide your organization to learning KCS style guide. Invest in training and certifying your core KCS style guide management team on KCS v.6. Your champions need to feel empowered and confident that they fully understand the process and can guide the rest of the organization.
- 5 KCS Stay Motivated:** The work of building your Knowledge Base is never “over.” You should always be looking at ways to improve, better capture knowledge, increase customer usage, and finding metrics to monitor your articles. Stay motivated by reaching out to peer institutions and sharing wins as well as losses. Get involved with your knowledge creators and discover what drives them to contribute. Celebrate your organizational success by promoting winning key metrics.

By keeping these five pillars in mind, you will put your organization on a path to having a successful KCS style guide program that will help resolve issues faster, optimize resources, and promote self-service as the primary method for customers when they begin looking for help. Laying a strong foundation is important in any structure and a KCS style guide is no exception.

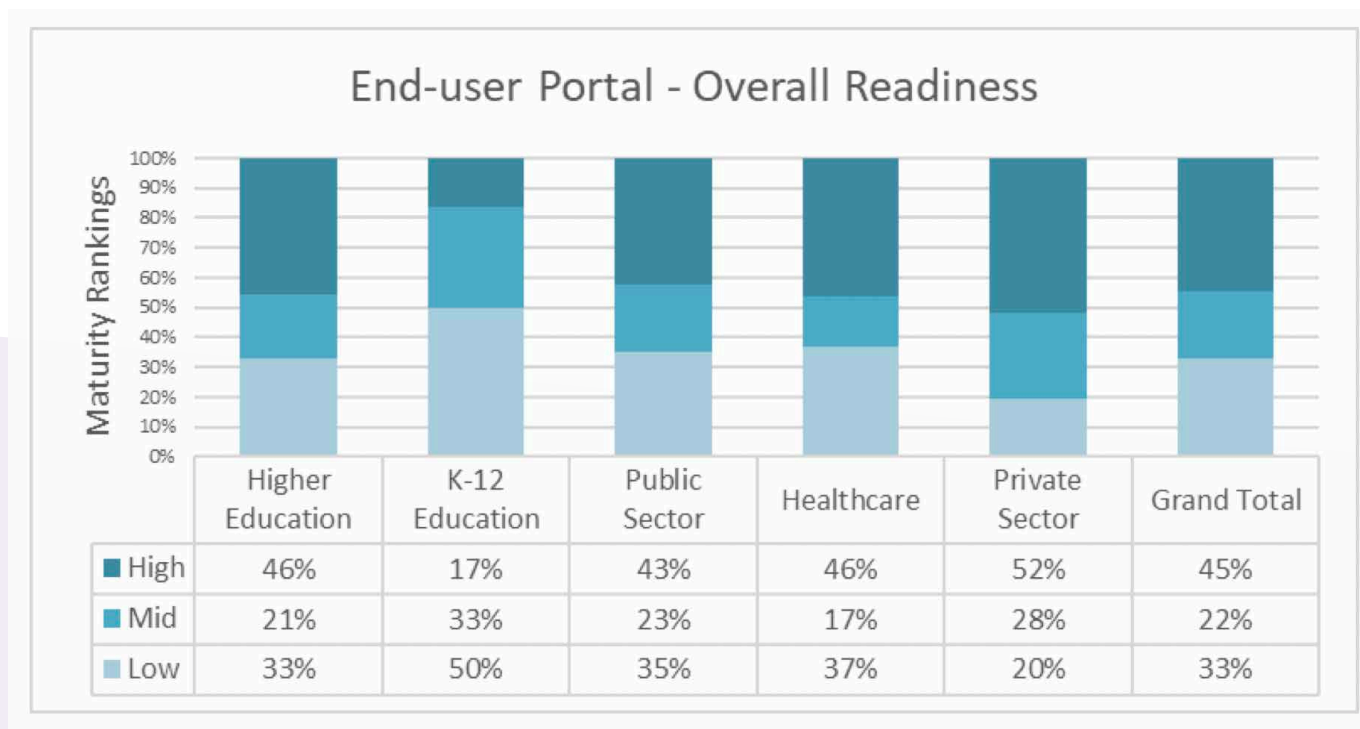
KCS® is a service mark of the Consortium for Service Innovation™.

How ready was your end-user portal?

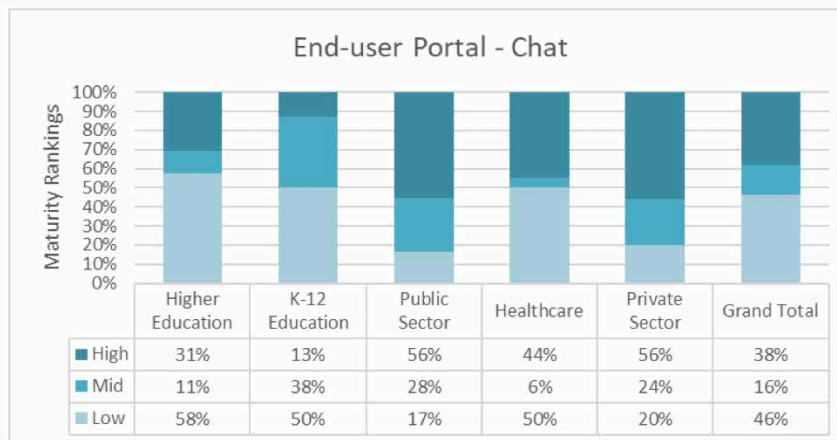
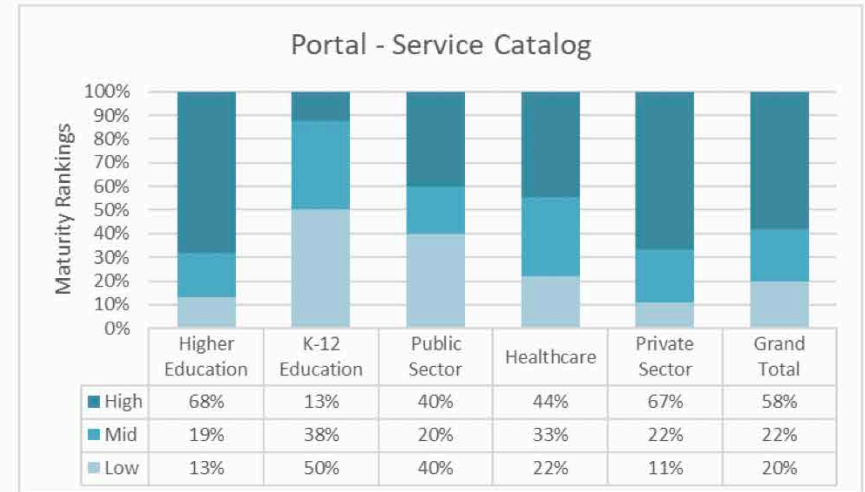
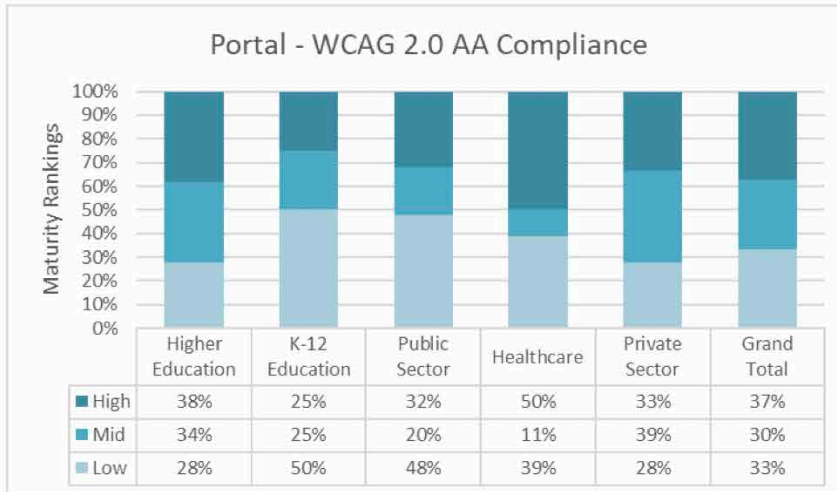


55% did not have a portal ready to go with the full scope of requirements satisfied.

When examining across all sectors, 45% of the participants self-ranked to 'highly' prepared to support a remote workforce and distant learning in terms of having a viable end-user portal. The remaining 55% are split between being moderately prepared (22%) and being entirely unprepared (33%).



How ready was your end-user portal?



In looking at the portal in terms of readiness, 63% did not have an accessible portal – ready to go.

The other key area for improvement focused on the use of a service catalog – navigation and usability are key factors in driving self-service adoption.



IT Service Management – What to Look for in an End User Portal

According to HDI, a support call costs \$22 compared to self-service, which has a cost of just \$2 per incident. With this in mind, it's clear that there needs to be a push toward including self-service in IT Service Management (ITSM) initiatives. But not all end user portals are created equal, so how can you tell what to look for?

Easy to use, own, and operate

For starters, your portal should be welcoming to end users. It must be easy to navigate, include graphical elements (i.e., branding, etc.) that your users will recognize, and use jargon-free language to get your message across. In terms of creating self-service portals, they should be also easy to build and easy to maintain, which means no specialized technical skills like coding or scripting should be necessary, and you shouldn't need dedicated resources to manage it either.

With a highly configurable portal, you can be strategic in your efforts as well—first focusing on frequently asked questions and those issues that contribute to a high volume of incoming help desk tickets.

Knowledge Base

Along with being easy to navigate and written in the end users' own language, stellar portals also leverage a knowledge base (KB) in your end user portal that is highly indexed, provides quick links to the most accessed content, makes it easy to enhance content, and is accessible via mobile devices.

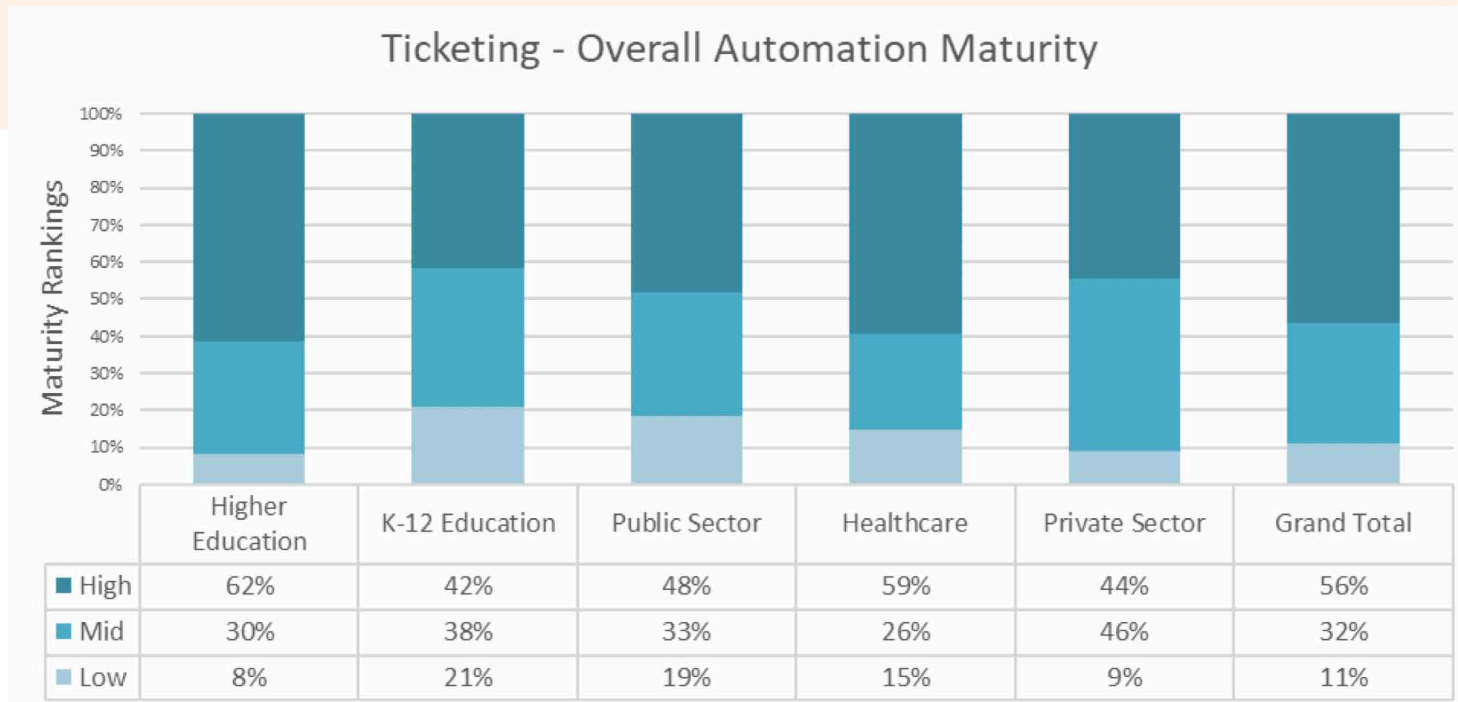
But since a knowledge base is only as good as the content it contains, it's good to follow industry best practices for creating and curating knowledge content in your end user portal. Knowledge Centered Service (KCS[®]) relies on the notion that content is generated as problems arise. While KCS started in ITSM, it's now being adopted across the enterprise. KB articles are living assets that can be leveraged by both the users and technicians, which translates into a dramatic increase in first contact resolution (30-50%).

WCAG 2.0 AA Compliant / Accessible

When creating a end user portal, it is important to be as accessible as possible, meaning it should be WCAG 2.0 AA compliant. Not only should the site be easy to navigate, but it should also be made available to everyone.

Ticketing & Automation

Automation and workflow are essential elements of any IT Support operation. When looking at this data, the majority of responses fell into the highly mature (56%) or the mid-level (11%). To further evaluate this area, we will look at a few key components.



“IT maturity is about moving from a ‘break-fix mentality’ to having the IT department become a strategic partner.”

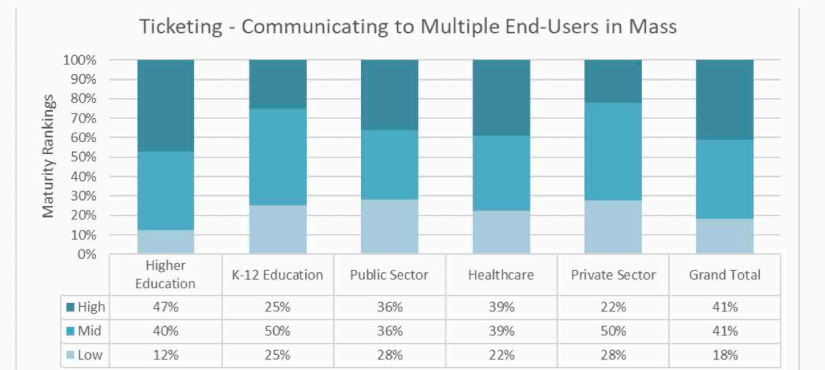
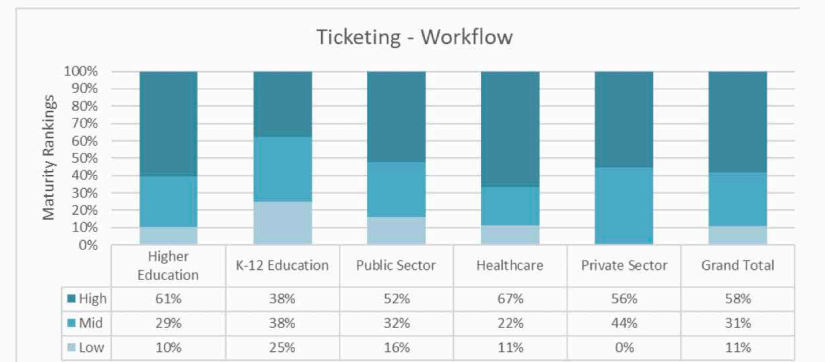
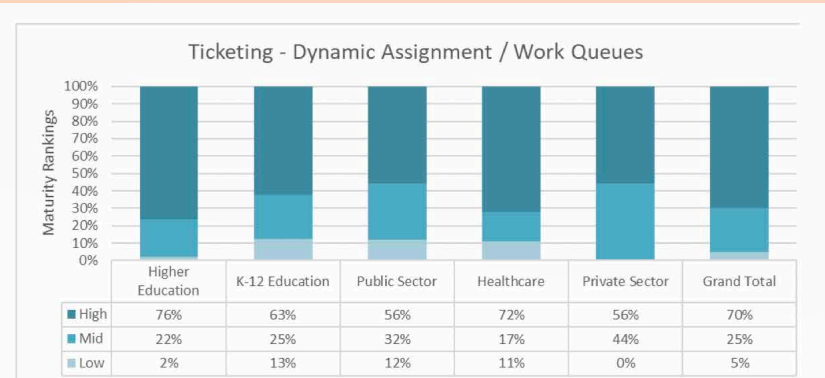
- JUSTIN MICHAUD Senior IT Program Manager for Alaska’s Matanuska-Susitna Borough School District

Ticketing Workflow & Automation

As demand continues to increase, there will be an increased focus on automation and workflow – beyond the more traditional capabilities – what else will be automated for increased efficiencies?

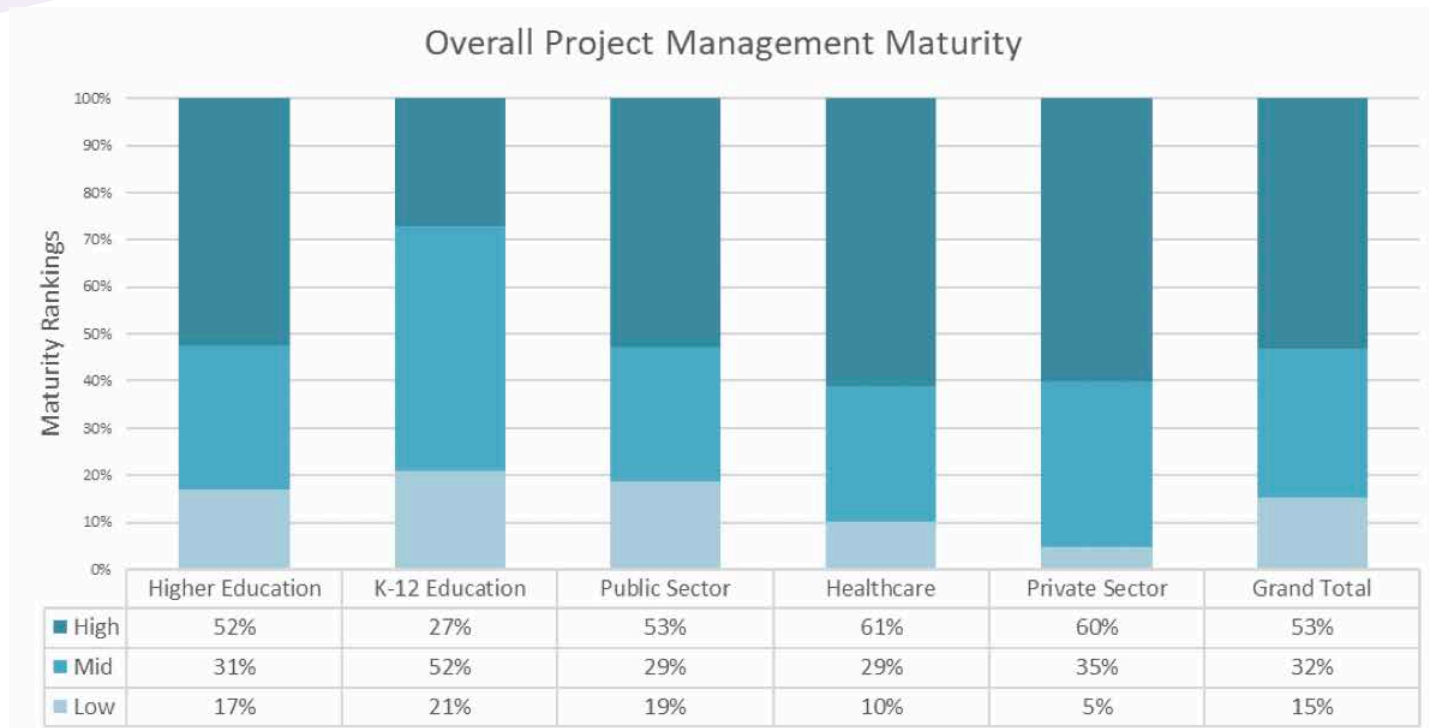
Areas to contemplate for ticketing automation:

- Simultaneously create multiple tickets in multiple applications to manage complex processes
- Route and assign tickets based on advanced business logic
- Monitor the ticketing platform and receive alerts for new assets or changes to tickets/assets and make updates
- Pull data from the ticketing system into a data warehouse
- Conduct mass ticket updates based upon business logic
- Modify user settings based upon business logic or workflow approvals
- Spawn work items in third party systems like Jira from specific tickets
- Update asset/CI data from a closed change





Project Management Maturity

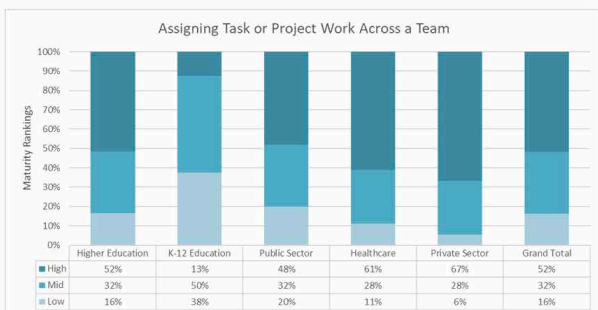
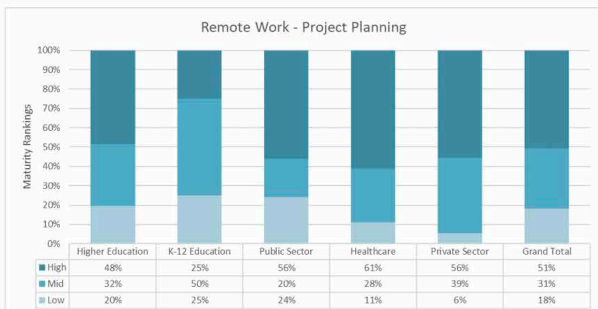
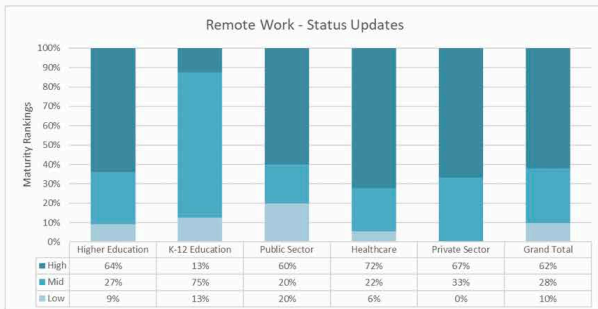


53% of study participants state that they were ‘ready to go’ with the ability to manage remote teamwork.

47% self-rank to just mid or low maturity.

Helping Remote Workers Collaborate

Some of the most prevalent comments on the free form section of the pulse study pertained to the ability to effectively manage team work. Areas of particular concern were keeping project status current, and the ability to communicate and collaborate more effectively as only 33% of the participants stated they could effectively conduct resource capacity planning across both tickets & projects.



“Moving to a single, automated platform gives us better visibility into projects and resources. It improves our ability to plan and adjust, and it makes our department more efficient.”

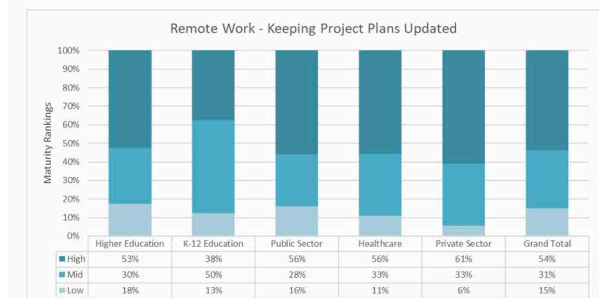
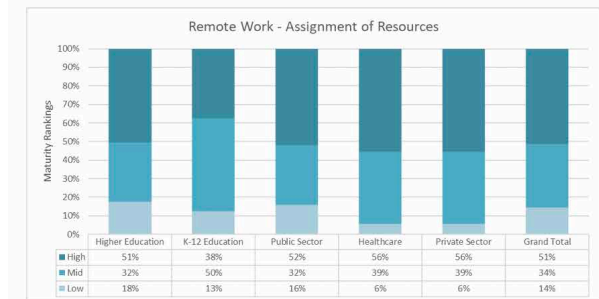
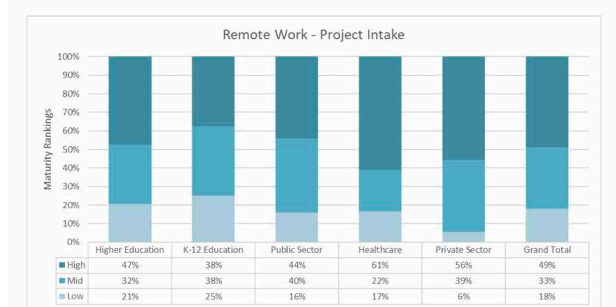
- RICK LITTLE, Manager of Application Services for the Interagency Information Technologies Division of Frederick County, Maryland, government

Focus on Project Intake & Governance

Project intake is always an issue. The topic has risen to the top of previous market studies when looking at project management. In a remote environment, project intake will become even more critical to have a strong project intake process and to institute clear controls for updating the project plan.

In order to successfully manage a project, you'll need to understand what types of resources you'll have at your disposal and determine how best to deploy them. That may sound pretty obvious and even simple, yet in practice, it can be anything but. In today's business environment, it's rare—if not unheard of—to find departments or teams focusing on just one or two tasks. It's likely that the resources you'll have working on your project are dividing their time and energy between multiple projects that are running simultaneous, but may or may not have anything to do with each other. Therefore, tracking and managing the resources you have working on your project becomes critical to its success.

If you've accurately and consistently tracked time for all project resources, you're well on your way to effective and proactive resource management. You'll be able to quickly identify where the bottlenecks are occurring as well as where excess capacity exists within your resource pool. At that point, you'll be able to shift resources around in such a way that the bottlenecks get the help they need without putting other areas of the projects at risk. And while this will help a given project run more smoothly, over the long-term, rolling this information up from the project and department level to the organizational level can help HR and the business units develop hiring plans in a more strategic way.



“There are tools that don’t do half of what TeamDynamix does and are far more expensive. Finding out that TeamDynamix could do both project portfolio and IT service management was a game changer for us.” - HECTOR MOLINA, Director, Central Project Office, East Carolina University

What did we learn?

Can IT leaders reduce the strain on their organizations while also managing tightening budgets? The answer is to focus on total cost of ownership, enterprise service management and increased visibility to cloud based data.

Is it easy to use? easy to own? easy to operate?

IT Leadership shined bright as everyone flipped the switch to WFH and enacted distant learning.

What went well and where do we focus for improvement?

✓ 70% - ticketing assignment

✓ 58% - service catalog in place

✓ 54% - ability to update project plans

✓ Ability to quickly pivot the team

✗ 53% - poor visibility to SLAs.

✗ 61% - managing project risk.

✗ 55% - end user portal was not ready

✗ Cost containment is top of mind

The focus will be on ease of use and administration as well as improved portals, communication and team work.





TeamDynamix



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