



Automating Service Delivery for the Entire Enterprise

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Many IT teams have a proven record of fighting fires to providing engaging services and creating more value for the business. To innovate effectively, they have leveraged the functionality of their IT Service Management solution to automate and support the service delivery lifecycle, from request capture to remediation. With automated workflows, IT teams have eliminated costly manual processes while making IT operations more efficient, compliant, and secure.

But a modern service delivery experience doesn't have to be limited to IT. For many organizations, it's becoming clear that all business departments can become more efficient and proactive by transforming manual processes currently driven by ad hoc emails, dated spreadsheets, or paper documents to automated, more streamlined workflows.

IT teams that have updated their operations with a modern IT Service Management solution are well positioned to help automate the services and offerings of other departments.

This approach of leveraging an ITSM platform to manage requests for, and delivery of, services beyond IT has been called Enterprise Service Management (ESM) and has been successfully realized by several customers of Ivanti® Service Manager, a recognized leader in ITSM solutions.

What is Enterprise Service Management?

While there are many definitions of ESM, most are similar in their inclusion of IT systems management practices and technology applied to other areas of an enterprise or organization with the goal of improving performance, efficiency, and delivery for services needed and used by employees. ESM helps automate previously manual steps so service delivery can operate more efficiently with ongoing tracking of key performance metrics, something that ITSM teams routinely deliver. Successful ESM initiatives also have a strong focus on the end user and their experience finding and requesting services.

ESM promises to automate processes across numerous lines of business from a single 'location' for employees. These processes could be ones for departments like IT, Human Resources, Facilities, Education, Legal, and more; really any department that provides some sort of service that is repeatable or routine. ESM is typically delivered through a service management platform that enables these departments to deliver services to employees in a consistent and cost-effective way. Any departmental team that handles requests for employees, users, or customers via a group mailbox or similar system is a service provider and can benefit from ESM to improve productivity, service performance, and efficiency.

ITSM teams will recognize ESM as an expansion of the already proven practice of IT Service Management (ITSM) concepts to the enterprise. ITSM enables IT teams to standardize, automate, and streamline critical IT service capabilities. While independent service management solutions outside of IT exist, ESM especially benefits organizations when previously siloed processes are combined into a single workflow designed for easy management and delivery of services routinely used by employees, often with a heavy leverage of ITIL best practices.

Value of Enterprise Service Management

Some of the main ESM benefits can be summarized as:

- Improved process efficiency within the individual functions and workflows that make up a service.
- Removed the bottlenecks that often occur between departments, so services can be better coordinated.
- Increased the consistency and predictability of service delivery.
- Improved operational visibility with reports and dashboards to track performance.
- Increased return on investment when more departments leverage an existing ITSM solution.
- Enhanced the user experience for employees searching for and requesting services or information.

The focus on the end user and their experience is one of the keys to a successful ESM initiative. IT professionals involved in successful ESM projects recognized that employees want to stay focused on their jobs, not spending more time than they need talking with service providers. Employees for the most part want to find what they need, make their request, submit an incident, and then get back to work. Consider the example of a sales representative who would much prefer to spend time selling rather than waiting on hold, filling out endless forms, or sending countless emails for what should be considered a routine request. Offering a single place for employee engagement to find and ask for what they need makes for a much better user experience.

Often the user experience can motivate a group to join an ESM initiative. An IT director shared how he gained support from the Security team by showing how a new approach to onboarding could be realized without needing to find, complete, and submit seven separate forms; all necessary information could be instead gathered and submitted at once.

The user experience for managers and executives can also be improved with ESM. For example, a common scenario is a manual approval process that often requires over a dozen emails, voicemails, callbacks if not more if several approval levels are required. Instead the process could be automated, including routing and rerouting, status checking, with multiple approval modes available from simple email acknowledgement to approving from a chatbot.

The increased visibility of service delivery activity provides further benefits to departments. Service Level Management translates well for departments who wish to track and analyze their performance and availability when their services are delivered through an ESM solution. For example, how well does the Legal team meet their agreed timeline to review a contract within two weeks? Automated service delivery also makes it easier to do audit checks as the audit team has visibility to requests and associated changes.

Use Cases

Any department that deals with requests for service or information from employees, users, or customers via emails, paper forms, or phone calls can benefit from an ESM solution to help manage those requests. Good candidates for joining an ESM initiative are departments who receive a high number of collaborative, time-sensitive requests around routine topics that need to be tracked and managed properly, including necessary approvals.

Processes from other departments that may benefit from ESM capabilities include:

- Human Resources: Handling requests for leave, changes to health plans, training and staffing, salary enquiries, and onboarding new employees.
- Facilities: Managing requests for repairs, office relocations, and furniture.
- Security: Onboarding new employees and performing security checks.
- Customer service: Dealing with large number of requests and follow-ups.
- Education: Searching course offerings or programs; managing cost approvals for paid courses.
- Legal: Reviewing, approving, and certifying documents; requesting standard contracts or legal forms.
- General Administration: Requesting office supplies, managing printing and shipping services, and tracking meeting rooms.

Most employees have submitted a ticket to or requested something from their IT department – it's a familiar system that is the foundation of IT Service Management. Most of the example processes above have similar requirements as IT and could leverage capabilities such as ticketing, workflow design and automation, self-service, knowledge management, and more for uniform and efficient service delivery across the entire enterprise, not just individual platforms.

Lessons Learned

In discussions with IT organizations, some common success factors emerge. One key factor is to ensure IT

has a firm service management foundation and delivery before helping other departments. Once achieved, IT can then better offer other teams the use of their platform to track tickets, automate workflows, route requests, and monitor activities, while the other business department focuses on the back-end fulfillment part of their service. Here are some other important lessons learned:

Realize other departments don't think like IT. Many departments don't know what ITSM or ITIL is, nor do they necessarily want to model themselves after IT. Recognize they have different needs and divergent meanings for common terms. For example, an 'incident' to an HR professional requires an "all-hands-on-deck" situation, while for the IT service desk it's just another day in the office. Instead of thinking like an IT provider, talk to them about a single place for employees to go when they have a problem makes for a better experience for everyone. Investing time up front makes ongoing collaboration easier and keeping the focus on the employee experience helps increase support for ESM initiatives.

Pick motivated departments. While IT can educate and help other groups, it's up to each department to understand what ESM can do and own those processes and outcomes. Especially with initial ESM forays, work with departments that are motivated, have bought into the value potential, and are willing to be an engaged partner. IT can help, especially with the technology, but ESM is more than an IT project as other departments will still be responsible for their request fulfillment and problem resolutions. Collaboration is often easier when IT works to gain a good understanding of departmental needs and business model.

Start small. As one IT director recommended, don't wait until you think you know everything and have mapped out the whole path. Pick initiatives that line up with both IT's and the target department's strengths, then begin with small, reasonable, and measurable steps. Start with a few processes (such as moving away from a shared mailbox to submitting, routing, and tracking non-IT incidents), adding on capabilities as quickly as your teams learn and users adopt. Build upon each success, moving to the next opportunity or team, while applying lessons learned for continual improvement.

Leverage processes. Different IT teams may not have the same processes so it's no surprise that other departments would as well. For example, HR already has many well-documented processes, from general information to more involved confidential ones. Review processes with them and look for improvement areas, first within the department and then across other impacted departments.

Collaborate on workflows. Work together with your business partner to see the steps, linkages, and triggers for the overall service. One common example is the new employee onboarding process. When viewed end-to-end, it's HR that kicks this process off during the recruitment phase, which moves through compliance review, background check, offer proposal, additional training needs, and more. On-boarding also touches other departments—IT for computing equipment, Telecom for phone and PBX set up, or Facilities for office space and supplies. These additional linkages and related workflows can also be included in the overall onboarding process so timely notices and needed information can be sent once the new employee's start date is clear.

Consolidate knowledge. Just as IT has its own processes and workflows, other departments have many documents employees need access to—such as the knowledge, policies, and documentation of HR. This is "low hanging fruit" in terms of immediate value creation because the employee experience is made better with just one place to find needed information.

Protect sensitive data. Many business departments, such as HR and Finance, are very sensitive about their data and reluctant to let other departments (such as IT) get too close. Make sure your ESM platform has options to let you protect and lock down fields and records to maintain needed confidentiality; it's often not a question of "if" but "how" to protect sensitive data. It may be necessary for these departments to separate their data and for IT to train these departments to work with it themselves. Discover these requirements up front before implementation so that they can be factored into the project.

Expand the Service Catalog. The Service Catalog is often a key part of ESM initiatives since it's the user's

entry point for the service portfolio offered by other departments, especially as interactions move away from the phone. The Service Catalog will change as your ESM program grows, with a service pipeline representing ongoing investment and innovation and retiring services representing past assets you want to recoup or sunset.

Don't forget the phone. Many users still prefer to make a phone call when they need something. Offering one service desk phone number doesn't mean the team manning the desk (like IT) needs to know how to fix everything, but it could mean having one phone number for employees to call, ideally backed up with an appropriate Interactive Voice Response (IVR) and skill-based routing system to avoid the phone transfer runaround.

Deliver a consistent experience. Keeping the focus on the user experience means finding and providing services needs to be done in a consistent way: the common phone number, the single website, similar service level agreements, maybe even common turnaround times for level 1 support. Different departments then look like they work together to make it easier to keep employees productive.

Celebrate success. Recognize ESM is a journey; you'll be working with new departments, updating existing offerings, adding new services, and finding new areas of innovation. Recognize team member contributions and

celebrate each successful rollout and update. Continue to measure your gains so you can highlight ongoing value contributions to employees and the rest of the organization. Nothing promotes more support and success than success.

Summary

For many organizations, ESM initiatives have shown they can improve the user experience and deliver higher productivity and lower costs. Bringing IT and non-IT service desks together and building on the foundation of proven ITSM solutions and best practices delivers clear value to other business departments and all employees with more efficient processes and engaging self-service capabilities. Teams should remember that this is an ongoing journey where each improvement and realized milestone should be recognized and celebrated as the successes they indeed are.

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