

ITSM Handbook for Remote Workforce Enablement

How to Ensure Business Continuity in Uncertain Times

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Introduction

The COVID-19 crisis is challenging fundamental assumptions for organizations of all sizes about disaster preparedness, emergency response, and business continuity planning. While many organizations in recent years have allowed, and even encouraged, working remotely for some individuals and roles, few companies are fully ready to support a predominantly (or completely) remote workforce. And yet the COVID-19 pandemic has resulted in new government guidelines and company policies that require exactly that.

Prior to the outbreak, 43 percent of U.S. employees worked remotely with some frequency, and 69 percent of U.S. employers offered remote work to at least some employees.¹ While current data on the extent of remote work isn't yet available, it's safe to assume that the numbers have materially risen and likely will continue to go up. As of this writing (March 26, 2020) 13 U.S. states are under "shelter-in-place" orders with more likely to follow. Many businesses in these states have adopted remote workforce initiatives as a means of continuing operations. This trend is likely to continue.

Keeping the business functioning while shifting to a fully remote workforce requires preparedness on a number of levels, and the organization must support a culture of flexibility and adaptability.

It must have clearly defined expectations and policies governing how the shift will occur. And above all, the organization must have the right underlying infrastructure in terms of systems and equipment to support the move. One of the most critical components of that infrastructure is effective IT service management (ITSM).

But the jump in demand for remote access has exposed the fact that only a small minority of companies—as few as 10 to 20 percent—are successfully deploying automated ITSM to support their workforces. Automation is key to infusing ITSM with the level of service management resilience required to cope with the challenges of COVID-19. Only an automated ITSM platform can support the employee experience and the speed required to thrive under the stress of COVID-19.

Build Resilience

When a critical event such as a disease outbreak, natural disaster, or network outage occurs, companies must be prepared to respond quickly. Not doing so is costly: research by the Ponemon Institute estimates the average cost of an unplanned data center outage, for example, at \$8,851 per minute, which works out to \$531,000 per hour, and \$12.7 million per day.²

A significant loss in workforce availability, or in productivity levels of the workforce, can potentially incur even higher costs for many businesses.

With these risks in mind, time is of the essence in dealing with COVID-19. To support the challenges it brings, businesses must offer superior rapid-response capability. This is perhaps most crucial when the event occurs and the affected company must urgently identify and locate the employees with the right skills and expertise to resolve the immediate issue. This can also be the most time-consuming step in the response process. Business continuity experts often cite a time frame of 45 to 60 minutes, on average, to assemble a team under normal conditions. Businesses must be able to dramatically reduce that time period not only because of the associated cost savings, but also because doing so can streamline the event response and accelerate resolution.

Prioritize User Experience

The first principle of service management optimization is to make the user experience as simple and smooth as possible. Since most users in the COVID-19 remote-work scenario are employees, this means designing the platform to deliver both what employees want and need—and in a way that engages them. Self-service, automation, and omnichannel accessibility are vital.

It's incumbent on IT leadership to assume responsibility for the user experience. IT leaders must solicit employee input and use it to drive development and management of the employee experience. The result should facilitate collaboration and innovation even though employees aren't physically near their colleagues.

A positive employee experience is directly linked to greater employee productivity. Research has linked high levels of employee engagement with working remotely 3-4 days per week.³ Additional benefits include cost savings as measured by money and time, efficiencies achieved by leaner work processes, and improved ability to optimize overall management of the business.

In the midst of responding to a crisis, time and other resources will be limited when it comes to making changes to the infrastructure driving employee experience. But there will never be a better opportunity to test that experience in real time and document lessons learned in an agile way. The goal should be to make what process and infrastructure

changes are feasible to drive a more engaging and productive experience and to track requirements for managing the employee experience over the longer term.

Manage the Transition

A remote employee management solution can provide employees a simple way to initiate the automated workflow that gives them the information and technology they need to remain productive. Simple equipment request and tracking along with status and announcement broadcasting can keep the workforce informed and effective.

- Rapidly equip their workforce for remote work
- Ensure a smooth transition with minimal impact to productivity
- Efficiently manage a dramatic increase in IT incidents and requests
- Ensure all corporate assets are accurately and simply tracked

The Solution should provide:

- Simple initiation of the work-from-home process via a self-service portal
- A clear, concise way to communicate best practices, policies, and how-to guides for employees making the transition to remote work
- A streamlined equipment and application request process and support
- A quick way to broadcast updated knowledge and announcements

Enable Status Check-in

A crisis management solution enables organizations to gain real-time visibility into employees as they transition to remote work, enabling them to ensure a safe, secure, and productive workforce.

Organizations directly impacted by COVID-19 or a similar crisis need to:

- Track the status and location of a workforce in transition to remote work
- Give employees a simple way to “self-report” status and location (for example “Checked in Safe at 8:00 AM”)
- Notify employees of updates in policy and safety procedures

A crisis management solution should support:

- Simple, integrated self-reporting function
- Self-reporting workflow based on employee status
- Management dashboard to track workforce status and location
- Easy way to send notifications

Secure Your Network

Security is always a priority for IT networks, and even more so as COVID-19 forces users to work remotely. There are three representative security use-cases that arise when companies go remote. The cases vary based on whether users work inside or outside the company.

- **Inside only.** A straightforward case in which an employee switches to remote-only and needs secure access to information and assets on the company’s network. This, of course, is more important now than ever before.
- **Inside to outside.** A customer support representative can no longer visit her customers at their locations and must support them remotely. Both parties must use the representative’s network to conduct business with each other, meaning that customers need secure access.
- **Outside to inside.** A field technician for a company’s vendor fixes machines at a company facility. Normally, the technician services the machines in person, but now must do it remotely. He must use the company’s network to gain electronic access to the machines, diagnose and repair them, and communicate with the employees involved—who themselves are remote. As in the preceding scenario, the technician needs secure network access.⁴

In all of these cases, the service management platform is the entry point for secure access to the network. How easily and flexibly the platform can be integrated with both internal and external systems plays a key role in the effectiveness of the platform overall and, in particular, in keeping the environment secure. As described in the Leverage Automation section later in this eBook, a service management platform that supports simple low-code automation enables a business to, for example, incorporate all security events logged in a separate system (most organizations have multiple security systems) within the service management environment and respond appropriately.

The service management system can then play an important role in maintaining critical security protocols associated with a remote workforce such as:

- Compliance with restrictions requiring employees to only use company devices to access company systems
- Compliance with guidelines governing misuse of company devices, including excessive personal use, accessing unsecure sites, etc.
- Compliance with security protocols requiring regular shut down and rebooting of remote devices

With the appropriate security infrastructure in place, the organization can support a remote workforce without raising significant new security issues.

Partner with Human Resources

Initiating a remote workforce scenario requires a tight coupling of HR and service management processes similar to what occurs during employee onboarding/offboarding, only on a larger scale. The organization must ensure not only network connectivity at home, and access to all needed systems, but also the internal resources employees need to access communications about the company's response to the virus, and the allocation of HR staff to address related issues as they arise.

The service management platform can automate the entire process of reporting virus exposure to the company and, aligned with the crisis management capability described above, track affected employees' movements in the workplace prior to initiating the remote workforce policy. This saves HR precious time in the race to notify others who may have encountered an exposed employee, alert all employees, and disseminate relevant protocols and procedures.

Establish a Knowledge Portal

Another key HR function tied to the service management platform is providing a virtual library for employees. Known as a knowledge portal or knowledge center, this function should be automated to constantly update and upload information on the ongoing crisis and make it available with just a few clicks. Requests for information can be sorted and routed to the right people in seconds, which often results in nearly immediate responses—and satisfied users.



The more advanced knowledge portals allow users to search for information using keywords and customize the responses for departments, business lines, and geographies. Importantly, these portals present search results in order of relevance, unlike less sophisticated portals found in the majority of platforms, which present results in random order and aren't designed for ease of use.

The platform supporting such a portal should have built-in flexibility for users both to create their own templates and processes and to adjust the platform as necessary to meet their changing requirements. They should also be configurable without requiring coding, saving time by enabling most users to quickly revise the system as needed. Additionally, such platforms should be scalable, able to handle the addition of hundreds or thousands of new remote users.

Provide Onboarding and Offboarding

As noted earlier, a critical HR capability is the ability to easily onboard new employees. During highly

turbulent periods such as a pandemic and resulting economic downturn, a resilient environment must also support rapid offboarding or furloughing of existing staff. The combination of rapid and flexible onboarding and offboarding make it possible for an organization to easily reintegrate staff after the crisis has passed.

A leading technical university recently faced a capacity challenge when it told students and most staff to stay away from campus and work remotely to protect against COVID-19 infection. The school's highest period of platform demand is usually the first week of the fall semester, when students arrive on campus and begin to get plugged into the system. But in March, when the university announced that everyone had to leave campus and work online, the infrastructure faced unprecedented demand as students, faculty, and staff simultaneously requested remote access. In this instance, the service management platform used by the institution provided the needed flexibility and could easily absorb the explosion in service tickets.

Enable Self-Service Support

Achieving resilience through the core capabilities outlined in the previous section is a critical foundation for supporting a remote workforce initiative. The next step is to provide an effective self-service support infrastructure enabled by the service management platform. Providing a successful self-service infrastructure requires two key components:

- A fully enabled self-service portal
- A well-defined and accessible service catalog

This section outlines how these two critical components work together to enable the remote workforce.

Provide a Self-Service Portal

As noted in the previous section, a self-service IT support portal is critical for managing a remote workforce.

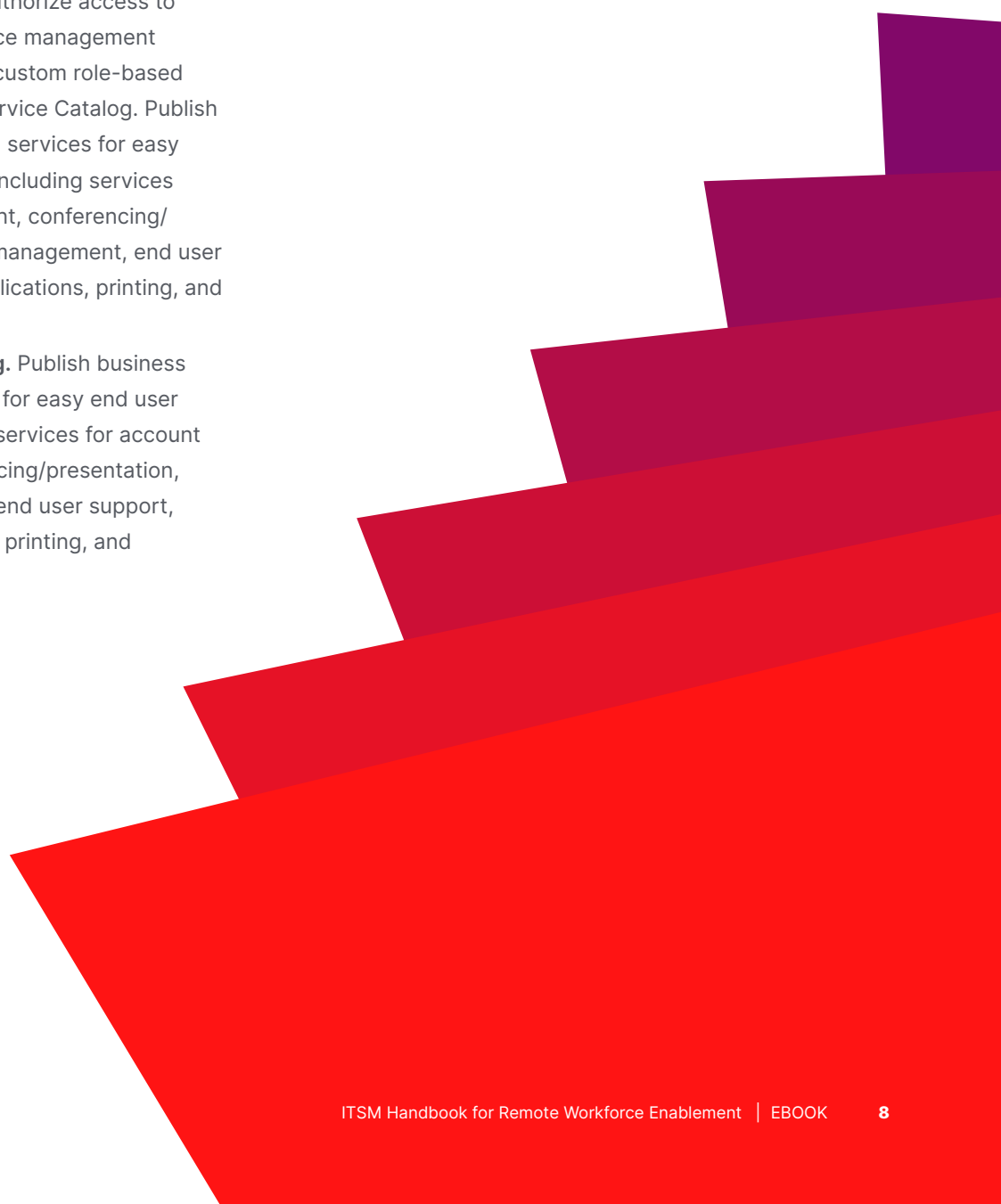
It's estimated that 60 percent of issues can be resolved through self-service. An effective portal provides the best assurance to an organization that all other aspects of its remote infrastructure will be effective. The portal must be easy to access and easy to use. A well-designed portal provides a one-stop shop for both knowledge and support, reducing—and often eliminating—the time delays inherent in email and phone support.

To manage the challenges of supporting a remote workforce, businesses need a configurable self-service portal that provides users with 24/7 access to services and support, automates request fulfillment, and empowers users to resolve their own issues. The platform should support the ability to configure distinct and secure portals for multiple business units, providing a one-stop shop where employees can find exactly what they are looking for, exactly when they need it. The self-service portal will support such employee activities as resetting passwords, requesting services through the service catalog, and browsing knowledge articles to solve issues—without support from a technician. The self-service portal can be configured to match the organization's brand to provide an interface that looks and feels familiar—a key factor influencing self-service adoption.



Key capabilities of an effective self-service portal

- **Automation.** Initiate one or more defined actions (such as creating an incident, sending an email notification, or changing the status of a record), allowing IT staff to create simple or complex workflows without coding or scripting.
- **Multiple Integrated Portals.** Configure and integrate portals for different lines of business—such as facilities and human resources—to provide a one-stop shop for everything end users need.
- **Advanced Knowledge Management.** Capture and leverage organizational knowledge, and make it readily available within the portal. Consolidate multiple knowledge sources into a single knowledge base, so that users (both end users and technical) can quickly find relevant information.
- **Language Localization.** Provide navigation, searching, reporting, and request submission in your end users' native languages.
- **News and Alerts.** Deliver timely and contextual announcements to your end users via news and alerts within the self-service portal. Secure Anytime, Anywhere Access so that end users can take advantage of the self-service portal 24/7/365 from multiple devices, including tablets, smartphones, and desktop computers.
- **Role-Based Access.** Authorize access to different levels of service management functionality based on custom role-based permissions. Robust Service Catalog. Publish business resources and services for easy end user accessibility, including services for account management, conferencing/presentation, desktop management, end user support, enterprise applications, printing, and telephone/fax.
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Expand Your Service Catalog

An effective IT service catalog can be the first place that an employee goes when they need to request a service or get support for an IT issue. The catalog is easily accessible through the employee's own computer or mobile device using the web-based IT service portal, and the information is searchable and well-organized. The employee can quickly find the service they need within the catalog, request the service, report an issue, or determine what steps they could take to address a service delivery issue.

On the technical side, your IT department benefits significantly when the use of the IT service catalog is widespread. Users can request service through a service portal itself, and automated processes can be used to notify approving managers and IT service staff of what items need to be addressed to deliver the requested services.

Organizations that use service catalogs save vast amounts of time by ensuring that employees can be readily connected with the services they need within the organization. The best part of IT service catalogs is that they act as a catch-all for service inquiries—whether a manager is requesting space for cloud storage or an employee is requesting a replacement keyboard for their desk, they can both access the service catalog to determine the fastest route for getting the request approved and fulfilled.



Some organizations include HR or facilities requests in their service catalog, making it even easier for employees to claim bereavement leave, report a sick day, request changes to their benefits plan, and more.

Simplify Remote Access

Although nearly 25 percent of today's workforce already works from home (at least some of the time), many workers being asked to make the transition are not set up to be productive. To enable rapid and

seamless access to systems and equipment, create service packages to facilitate ordering. Filter those packages by region, role, and other key criteria. Most importantly, automate approval flows to get (and keep) your team up and running.

How to create an IT service catalog

Developing and managing a service catalog for your business can streamline processes, save you time and money, and improve your resource allocation. Here's how to get started:

1. Identify the services you will offer in the catalog. The most important and most difficult part of creating a service catalog is identifying all of the services that your business needs to run. This is best done as a collaborative process that incorporates feedback from leaders of several business units. It is useful to think of services in terms of "service requests" rather than "service offerings." You can also reference earlier service requests to get a sense of the kinds of queries that your service catalog will handle. An agile approach is helpful for this exercise. Start with most critical or common items first, and extend over time.
2. Define access, permissions, and approvals. It's great if every employee at the company can access the service portal when they have an IT-related request or issue, but administrators need to set permissions so that certain types of service requests can only be approved or made by managers. For example, it's probably okay to let employees submit Printer Maintenance requests, but a request for expensive new replacement hardware should be approved or made by a manager. In addition to security protocols, as noted above, these kinds of parameters benefit from a platform that provides for seamless automation of tasks. Streamline search - some catalogs list services alphabetically, others categorize them by type, and some contain a search function that lets users find the information they want using relevant keywords. However you choose to organize your catalog, your users need to be able to find the answers to their questions quickly and efficiently.
3. Build the portal. Now that you have your services listed and organized, the next step is to build a tool that allows users to access the catalog. The portal must provide all of the capabilities outlined in the previous section. In order to support a remote workforce initiative, it must be effectively accessible from outside the organization's premises.
4. Test system functionality. Start by offering support for a limited number of services within a small proportion of your overall user base. Like any new software rollout, you'll want to do some early testing to ensure that the system is effective and functions how it is meant to. Once you've ironed out any issues, you can begin offering a wider spectrum of IT services to a broader group using the web portal.



Empower Your Remote Workforce

After putting a resilient infrastructure in place and implementing a service-catalog-based self-service portal, your business is ready to support and enable a remote workforce. However, achieving optimal remote performance requires additional service management best practices, as outlined in this section.

Arm Your Employees with Knowledge

One of the biggest roadblocks for remote workers is finding the information they need to stay on task. Take the time to identify the right knowledge blocks to provide in context for remote workers. Bolster your approach to knowledge management by tracking knowledge usage statistics to improve relevance.

To provide employees the knowledge they need, establish and maintain a Service Knowledge Management System (SKMS) as the central repository of all information needed to manage the service life cycle for all of the services that the IT organization provides.

The SKMS combines several subsystems into a single super system that draws data from multiple sources, uses software applications and technology to synchronize and reconcile the data into usable information, conducts modeling and analytical processes, and presents the resultant knowledge in searchable formats.

Data in the SKMS can be derived from several sources, including the organization's asset management system, the software library, service request management data, service desk metrics and KPIs, identity management systems, and the configuration management database.

Once the data is federated and reconciled within the system, analytical methods can be applied to translate the derived information into knowledge that is usable by the organization.

The Service Knowledge Management System allows the knowledge manager to execute querying and analysis of the captured data, plan and forecast future conditions based on the current data, construct models for business process improvement by manipulating known variables, and monitor the organization's ongoing performance across a variety of metrics. This knowledge is made available to customers throughout the company and used by executive managers to improve decision-making.

Knowledge Management Strategy

Knowledge Management begins with data capture, and any effort to capture data requires strategic planning to determine what data will be collected, how that will be achieved, and the expected business benefit. Organizations should establish a Knowledge Management strategy that describes the kinds of information they would like to capture and how they expect the organization to benefit.

Knowledge Transfer

Identify knowledge gaps within the company, which occur when a person or department needs knowledge that they do not have access to. Develop a communication or transfer plan to communicate the knowledge where it is needed.

Information Management

Implement policies to collect data, define the architecture of the SKMS that will develop that data into something usable, and continually improve the processes and procedures for the use of the SKMS.

The Function of the SKMS

The effectiveness of the SKMS is the ultimate measure of the effectiveness of a knowledge manager. When customers require tech support at a time of the day when the service desk is not available, the SKMS should serve as a reliable knowledge base where they can access any documented information the organization has collected that might pertain to the issue. Knowledge managers control the development of the SKMS and try to make it user-friendly for customers.

Leverage Available Resources with Real-Time Collaboration

A remote workforce is a distributed workforce, lending itself to different models of support from those traditionally used within a single worksite. Traditional ticket reassignment is inefficient and breeds uncertainty in a time when anxiety is already running high. Give your employees real-time results by enabling virtual collaboration and team-based support. Remote collaboration tools foster efficiency and human interaction, reducing uncertainty.

Integrate Collaboration Tools

Integrating existing collaboration tools such as Slack or Microsoft Teams enables an accelerated team support model connecting the right IT support people directly with employees to provide the quickest resolution. Ideally, employees should be able to raise and resolve their own incidents within these familiar chat and file-share environments.

Enable Real-Time Collaboration

Use related item navigation, skills mapping, and integration of chat and file sharing tools to enable a new collaborative model for instant support and faster resolution. A team approach to support provides more context, unexpected insights, and a quicker resolution to the issue.

Build Intelligence

The service management platform should support built-in intelligence features such as related item navigation for service technicians. This capability directs technicians to related records, attachments, emails, and chats. It automatically delivers knowledge in context for faster resolution. Built-in intelligence can also support identifying the correct resource (or resources) to assign to an incident via skills mapping.

Offer a Virtual Agent

A virtual agent provides natural language access to the knowledge base and automated actions service catalog. It can either assist in providing knowledge support or implementing the automated next step defined within your environment. Virtual agents are often useful in addressing such common problems as:

- Submitting a service request
- Logging an incident
- Updating incident status
- Showing your devices
- Resetting your password



Extend Remote Services Beyond IT

IT is vital to worker productivity, but it is only one of several important service types. Providing a shared services portal leverages your employees' familiarity with one service environment and extends it to other areas where they need support. Make sure members of your remote workforce get both the knowledge and support they need to succeed, whatever their function.

Organizations Reduce Service Delivery Costs with Shared Services

Many of the United States' largest private sector corporations, including General Electric, Ford, Pfizer, and SAP, have adopted a shared service model to drive down service delivery costs, saving millions of dollars in the process. In the research conducted by Deloitte, respondents indicated that cost efficiency and driving business value were the top priorities for investments in shared services. The survey revealed that 80 percent of respondents were able to recover their initial investment within three years of a significant Shared Service Centers (SSC) implementation.⁵

Shared services facilitates automated service delivery

The centralization of HR and IT service delivery is already an effective means to reduce costs, but it's even more effective when combined with the technological advantage of a shared services portal. Shared service portals create the opportunity for organizations to introduce automated service delivery processes for repetitive, rule-based activities like password changes or information requests.

- **Standardize reliable service delivery.** The establishment of a single point of contact for service delivery within an organization creates standardization in service delivery throughout the business, eliminates differences in service efficiency and methodologies between business units, and creates a reliable and efficient organization-wide path to request fulfillment. A centralized IT service also brings consistency and standardization to IT service delivery, enabling the IT organization to optimize the delivery of services such as applications, servers, and data processing to all areas of the business.

- **Eliminate service duplication and business unit silos.** Shared Service Centers reduce service duplication and business unit silos within organizations by integrating service functions into a single department. This prevents knowledge silos from developing within business units and ensures that knowledge generated through service delivery can benefit the entire organization. A shared service portal connects users within the organization to this single department where they can access key services through a streamlined process.
- **Centralize service data and promote efficiency.** The establishment of a centralized and standardized service delivery process, along with the implementation of a software-based shared service portal that can capture service data, can inform best practices in connection with service delivery and act as a valuable information source for the organization.
- **Scale up over time to increase functionality.** One of the key benefits of shared service centers is that they offer a fully scalable solution for organizations that wish to improve the productivity and efficiency of their service delivery. Organizations do not need to conduct a massive, multi-service implementation of the shared service model. Instead, they can begin by establishing a single SSC with a single function and slowly increase its capabilities over time.

Leverage Automation

Automation is a critical component of an effective service management platform. Automate simple and complex workflows, common actions, and routine tasks to increase operational efficiency. An effective service management platform will support low-code or no-code automation of activities without relying on costly development resources, so your team can deliver services more quickly and cost effectively. You can run workflows manually or execute them automatically against individual records or groups of records.

As noted above, you might combine automation with API integration to notify your system of all security events logged in a separate system. In that scenario, you can set thresholds for how to respond to these notifications and define the appropriate actions based on incident information provided through the API. Depending on the type or severity of the incident, the platform may generate a new incident for immediate attention or may just log the event for future reference.

Likewise, you can define automations that call a web service to bring in information from other systems as needed. For example, you might call a web service to update status on configuration items from a CMDB system when carrying out an asset management workflow.

In either case, you would embed all the decision-making logic associated with the workflow in the automation. This helps you to ensure that information received from other systems (whether proactively by an API or by request via a web service) is aligned with the defined processes and policies of your business. This greatly simplifies supporting typically time-intensive workflows and better enables remote operations.



Conclusion

Although the COVID-19 crisis is unprecedented in scope, it is safe to assume that it is not the last such event that businesses (and society as a whole) stand to face in the years to come. Lessons learned in real time today can become the basis for strategies going forward—and serve as the foundation for enabling an increasingly distributed global workforce. Addressing the challenges raised by the COVID-19 crisis requires businesses to take action on multiple fronts.

- **Build resilience** through such capabilities as remote workforce management, crisis management, and remote HR and security practices.
- **Enable self-service** through a self-service portal supported by a services catalog
- **Engage in remote support best practices** such as serving your employees with knowledge, leveraging available resources with real-time collaboration, extending remote services beyond IT, and leveraging automation

The key to all of these is leveraging a service management platform that provides flexibility, automation, and multiple engagement channels not only to support a remote workforce in the wake of the COVID-19 crisis, but to respond to the many challenges that lie ahead.



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