Reaching new heights with ITSM

12 best practice tips from the HPE ITOM Insiders

Get started
Tip 1: Make sure to spend enough time planning your project.

Tip 2: Don’t customize, configure: Customizations will cost you, more than once.

Tip 3: Don’t forget the power and influence of master data.

Tip 4: Have a single source of truth for your data, and an architecture to map to it.

Tip 5: Engage with social self-service.

Tip 6: Remember we are suppliers and the users are our customers.

Tip 7: Learn from others’ experience.

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Tip 12: Get a “friend” in top management—we are talking about serious improvements here.
We hope you find this e-book interesting and informative. In this e-book, seasoned ITSM leaders from the HPE ITOM Insiders community share their best tips for providing world-class IT Service Management, helping everybody to reach new ITSM heights more quickly. We warmly thank the following leaders who actively contributed to this e-book:

- **Henrick Brattlie**, Manag-E Norge AS
- **Robbie Clay-Ament**, Delta Airlines
- **Frank Eck**, T-Systems International GmbH
- **Padraig Farrell**, Aer Lingus
- **Vadim Gordadze**, Vitte Consulting, I-teco Group of Companies
- **Jeffrey Hall**, American Healthcare Lending
- **Dedan Kanyuira**, Britam
- **Mark Laird**, Sopra Steria
- **Stefan Narnhofer**, Raiffelsen Informatik
- **Philip Randles**, Sopra Steria
- **Sigve Sandvik**, EVRY
- **Jan Schepers**, CTG
- **Thore Senneset**, Helse Midt-Norge IT
- **Chris Visagie**, SORTIT
- **Diana Wosik**, Sopra Steria

We welcome you to join the community; please go to [HPE ITOM Insiders](https://hpeitominsiders.com).

Best regards,

Jean-Marc Bronoel
Senior Director, ITOM Customer Success & Solutions Delivery
Tip 1: Make sure to spend enough time planning your project.

Be sure to take the time to plan what the service should ultimately look like and map out as many features as possible before you actually start working on developing the service. It is extremely difficult to make changes to the service once it is nearly ready. Bottom line: even if your deadline is very tight, don’t underestimate the importance of the planning phase. I’ve personally experienced situations when, at the moment a project was about to be deployed, we realized that somebody had forgotten a crucial feature, and the project was postponed. To avoid this frustration, ask yourself some basic questions, such as:

- What is the service supposed to provide?
- Who should be able to use it?
- What are the deadlines for deployment?
- Are all the features that you have defined feasible?
- Are the teams that are supposed to provide you with your solution available?
- Have you agreed on who will make any final decisions?

**It is extremely difficult to make changes to the service once it is nearly ready.**

- How will the service, once deployed, be managed?
- Who is responsible for its maintenance?
- Have you asked the users what features they expect?
- Have you collected and analyzed the information about similar projects to eliminate any identified issues?
- Has senior management bought into the plan?

This will help you to develop and manage your service effectively and predict any blocking points that might occur before the service is deployed.
For each customization that you make to the software, the cost of upgrades will increase. Adjustments to procedures, organization, and so on are less expensive. Be sure to weigh customizing the tool against perhaps slightly adjusting business process/workflow. The latter might give you the same or better effect at a lower price. This is often the winning argument when saying “no” to a customization. When customizing, make sure to bypass existing functionality rather than change existing functionality. This might reduce risk of recurring costs on upgrades.

**Make it difficult for people to customize without a good reason.**

And remember, the most difficult thing to predict is the future. In addition to understanding how the tool thinks, it might be a good idea to make sure you understand the direction your tool supplier is moving.

Rather than developing code, deliver on customer requests by configuring the software via the provided interfaces. This makes upgrades much easier, quicker and less challenging. Generally when suppliers upgrade products, they test for backwards compatibility with configuration changes, but they cannot test for code changes that they have no visibility into. If you customize rather than configure, then as part of a product upgrade you need to identify all the changes made, identify how they will be done in the new product, decide whether they are still required, recode, test… and the list goes on. So, how do you balance between customizing and configuring?

To start with, make it difficult for people to customize without a good reason. In our case, all customization requests had to be validated and accompanied with director level approval. It’s surprising how many of the “must have” requests suddenly disappeared when they had to be justified.

**Tip 2: Don’t customize, configure: Customizations will cost you, more than once.**
Master data defines the organization and drives the behavior of the underlying processes. If the supporting master data is lacking or “dirty” then the operational environment may suffer. Organizations should focus on the master data during the project planning phase. Questions such as the following become crucial:

- What do you want to report on?
- What do your operational reports look like or what should they look like?
- What is your SLA with your customers?

Answers to these questions can drive behavior throughout the system and can assist the project team in determining what supporting or “master” data is required. These seem to be simple and straightforward, but the perceived simplicity is also the reason why these elements are typically not addressed until operational reporting time comes around.

The team must ensure that the data is actually trusted and clean.

At the project outset, a template for typical master data can also ensure that relevant focus is kept on the master data. An additional benefit of initiating the project in this manner is that it also adjusts the process work of the project and requires the team to focus on the effect the data will have on the processes.

In addition, an implementation project typically involves integration and a discussion of where the trusted supporting data resides. In most cases, the data housed on the existing various infrastructure systems is considered to be the trusted data. Implementation teams must carefully ensure that the data on these hosting systems is truly “clean” or relevant and accurate to the environment being implemented.

The team must ensure that the data is actually trusted and clean, as well as ensure that the data mappings are clearly understood by both systems. This is what will ultimately provide value to the environment and allow the stakeholders to make informed, accurate decisions which improves the business process execution.

Chris Visagie
Solutions Architect, SORTIT
One of the key things for bigger organizations such as mine, a service provider, is to know where the master data is stored, and why they are stored there.

For example: Which system should be the master system for company information? Or which system should be the master system for contacts?

It is vital to know where these data are stored, and how you should set up your solution to enable optimal exchange of these data.

**Know where the master data is stored.**

For example: Should users be allowed to change a customer's company name in Service Manager, even if the customer company information is originated from the sales force automation system? If a user is able to change these data, what should then happen with the source data, and why?

So many times enterprises dive into these efforts without taking the time to map out a data management plan. Part of that plan would be identifying the system of record for each data source. In the case of configuration management, so many systems are used to manage different CI types that each has to be documented.

For instance: If CiscoWorks is the tool that manages network devices then it should be documented as the system of record for network devices. SCCM might be the system of record for Windows® servers, BladeLogic might handle UNIX® servers, etc.

After all, the system that is actually used to manage those CIs would have the most current and accurate data. Additionally, it would have the deepest level of data granularity related to the CIs.
Tip 5: Engage with social self-service.

Provide an engaging self-service portal; the end users will embrace the Single Point of Contact (SPOC) principle. They will want to use the contact point provided by IT as long as it gives them value. This ensures that end users can help each other, and that the organization can harness the knowledge of the users. If Big Data is introduced into the mix, the value will multiply, and organizations can include gamification to drive engagement and collaboration.

End users will embrace the SPOC principle.

When users are engaging in self-help and helping each other through wikis, community blogs, and Q&A, they will open fewer tickets with their IT department. This does not mean that IT is not aware of what is going on; as long as they have Big Data on their side to gather and reuse all the end user knowledge.

Henrik Brattlie
Manag-E Norge AS
As IT professionals, we tend to get tied up in the processes and forget that there are real people out there that need their issues resolved. We need to keep this in focus at all stages in the service development and delivery lifecycle. We are here to deliver value to the business not to indulge in IT technologies. We must remember the ITIL® definition of the utility of a service. It must enhance performance and/or remove a constraint. Do we think of this when designing services.

At the end of the day, IT exists to serve people first and experiment with technology second.

The other aspect of this is that we must remember that when an incident is raised a user is usually unable to perform a task or tasks effectively. This means that the business is not getting the expected value from the service. To put it more simply, it is costing them money. At the end of the day, IT exists to serve people first and experiment with technology second.

Padraig Farrell
IT Service Manager, Aer Lingus
Experience is hard won, quite often the best learning opportunities are provided by your own or other’s mistakes that you have to put right, often under very tight deadlines as a result of a service impact. Therefore it is imperative that not only do you document these experiences, you share them amongst your peers. In this way, the knowledge learnt can be shared without the pain of the learning process.

**Regular talking is essential.**

Within my company, and in previous companies, I have created SME groups of those leading ITIL processes, in order to do this. The Forum meets monthly, and reviews both the processes and the tools used to deliver them. Improvements are identified and adopted into IT service management as required. The most important element is that each SME will bring an issue to the table, and more often than not, another SME around the table has encountered the issue and solved it to some level.

**Philip Randles**
Group PMO, Sopra Steria

Continued learning from those that have shown you the ropes and diligently seeking the knowledge and understanding of those that built the ropes will increase our effectiveness and advance our progression as individuals and as a whole. Constantly monitor if the solution in place is sufficient.

**Jeffrey Hall**
Operations Specialist, American Healthcare Lending

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**Tip 7: Learn from others’ experience.**
Have a clear process definition of the border between change and request management. Change management is an internal process that supports the customer's service request, particularly if the service request requires a change in the technical infrastructure. Be sure you have a hand off and exchange of information between the service request process and the change request process.

**Be clear on how the processes interact.**

For example, if a customer creates a service request for storage extension, then this leads to a commercial order, and invoicing. This is also a change to the infrastructure that requires the change management process. And, you will also need to pull in the configuration management process. These three processes are interconnected, and organizations need to sharpen the process definitions and define the borders between the three. Be clear on how the processes interact, and determine whether you will implement a common tool set that includes all of the processes, or implement a best of breed tool set for each.

Frank Eck
Head of F2R, T-Systems International GmbH

Tip 8: Tear down walls between change and request management.
When designing a Service Item, there are two different perspectives of how this item and the workflow behind it should work. On the one hand, you want your customers to provide the information needed to completely automate and eliminate manual steps. On the other hand, to increase customer satisfaction, you want to reduce the complexity of the Service Item to make it as easy as possible to use and to order. In case of automation at the backend, for example: suppose we design a Service Item in the Service Request Catalog so that customers can automatically install software to their clients.

**Reduce the complexity of the Service Item to make it as easy as possible to use and to order.**

We need to know details such as What’s the computer name of your client?; What software do you want to install?; What version of Microsoft® Windows are you using?; and so on…). But we already have most of this information in our IT systems distributed over many other applications like SAP®, Active Directory, databases and so on—so let’s use this instead of forcing the customers to provide that again and again.

The goal of intelligent service design is to cover both perspectives to get them married in one smooth functioning workflow. This can mostly be easily done by using a complete operations orchestration tool to collect the additional data you need straight from existing data in your distributed systems. Most of the companies have the information we need right in their systems—maybe not directly in Service Manager, but distributed over other systems or databases.

Bottom line: only ask the customer for information you cannot get from other reliable sources. This ultimately improves customer satisfaction as your customers save time in ordering your Service Items.

**Tip 9: Increase customer satisfaction by intelligent service design.**

**Stefan Narnhofer**
Service Manager Administrator, Raiffeisen Informatik
First, a company or organization has to make sure they have a clear view on what is their core business and what is not. I do realize that this is often a challenge by itself. However I think it’s safe to say that in most cases, processes for IT, CRM, HRM and supply chain management are supporting processes for the core business. This doesn’t mean that they are not important; in fact, they are very important since they are the foundation that enables your core business.

In contrast to the core business, where a company should have extensive expertise and should constantly be striving to be unique and innovative, the foundation should be stable. And the good news is that there are a lot of best practices for these supporting processes. These best practices are proven and, rather than spending a lot of money to reinvent them, a better investment is to focus on improving your core business. For IT, best practices include ITIL, COBIT, and testing methodologies. For HRM and CRM there might be less conformity but best practices do exist.

These best practices are proven and, rather than spending a lot of money to reinvent them, a better investment is to focus on improving your core business.

For most of these supporting processes, there are many tools available, with best practices built in. So if you choose a tool to support your supporting processes, and you see some differences with how you work, you may want to re-evaluate your own process against the tool. It might save you a lot of costly customizations and you may see advantages in adapting the process as implemented by the tool.

Of course it is also possible that one of the processes mentioned is really your core business. In that case, you will want to have both a solid foundation for supporting processes, but you should also keep up with trends or, even better, be a trendsetter with your services and the ROI it will deliver to your customers.

Jan Schepers
ITSM Consultant, CTG
Successfully managing all aspects of change, whether a technology change or a process change, has a large impact on the overall success of projects. In my own experience the biggest change is on people. The critical questions for one to ask then would be:

- How do I win the hearts and minds of the people (especially stakeholders) to get their full support?
- How do I deal with organization/departmental culture and positively influence the right culture and attitudes (especially for process change projects)?

**The biggest impact of change is on people.**

- "How does this specific project support overall business objectives and positively impact customers or end users?"
- How do I speak in a language that is plain and clear to all stakeholders devoid of technological jargon?
- How do I "sell" the value proposition of the project to the stakeholders?

Dedan Kanyuira
IT Service Delivery Manager, Britam
Most projects that are implemented with the intent of improving business processes in the company are dependent on getting a lot of input from the customer—both financial and human resources to contribute to process design.

**If you don't have a “friend,” then be prepared to fight for everything.**

When I say that you need a “friend” in top management to make the improvements go live, I mean that the person who approves business process changes, financial flows, and people involvement must be supportive of you and must understand the purpose of the changes as well as the potential outcome of the project. This high level manager should be a decision maker and should show support for the project. If you don’t have a “friend,” then be prepared to fight for everything—even an insignificant change or small amount of financial input from the customer.

Here are two key essential reasons you need a friend in top management:

1. People typically do not like change; they are generally happy with current processes and how they work. However, serious improvement will often require major changes. Without top management involvement, you may encounter conflicts with the individuals who actually need to implement or who are affected by the actual process changes.

2. The top manager can ensure that the proper people are actively involved in process design focus groups. These individuals must understand the process and should have influence on others. They also should be aligned with you on the project and should support it.

Both of these key points are extremely important; to provide real improvement, you need a top manager to be your best “friend” and idea sharer.

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**Tip 12: Get a “friend” in top management—we are talking about serious improvements here.**

Vadim Gordadze
Vice Head of the department, Vitte Consulting
I-teco Group of Companies
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