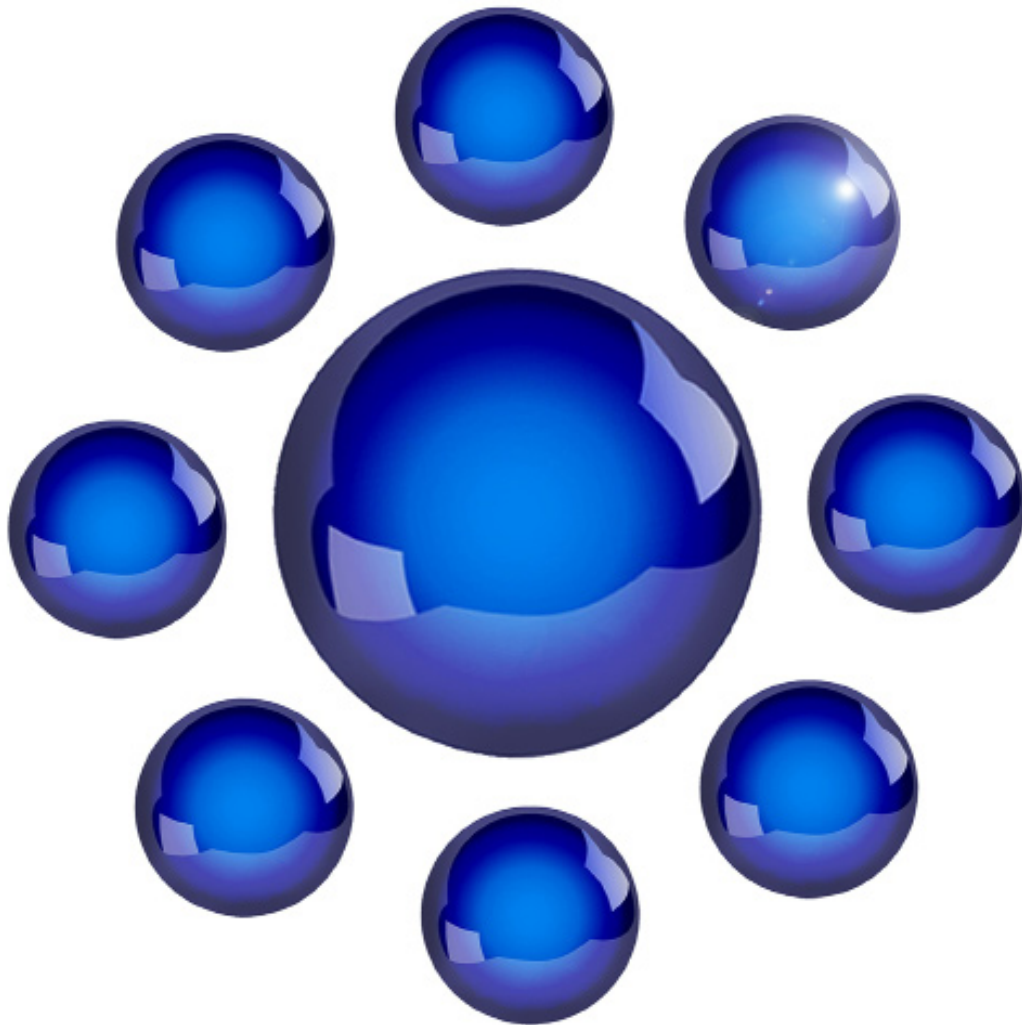


# White Paper: ITIL & e-Service Desk Business Case

Simple, accurate and flexible - that's the new reality for progressive Service Management Strategies;  
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**BYTES**  
SYSTEMS INTEGRATION



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## Recommendations

The following are the recommendations of the working party who have contributed towards this document:

### Investment in a new Service Management Tool

The investment in a new service management tool is recommended to enable IT to deliver the objectives laid out in this document.

### For the business and IT to adopt ITIL best practise disciplines

This document describes how the adoption of ITIL and industry best practise will be of benefit to the business.

## Management Overview:

It is recognised that dependence on IT has become critical in order to satisfy the business needs and strategic aims. This increasing dependency has led to a growing requirement for high quality IT services. These services are also required to meet the evolution and future business needs and user requirements.

It is proposed that a best practise solution is introduced to ensure that IT services meet and exceed the expectations made of them.

As part of this best practice solution there is a requirement to replace the existing Helpdesk application with a solution that is based upon industry best practice.

## Introduction:

### IT Service Management

IT Service Management focuses on the following deliverables:

- Management of IT Service Provision
- Delivery of IT Services to meet business needs
- Support of IT Infrastructure, Systems and Services

To help achieve these deliverables it is proposed that the business adopts an industry best practise called ITIL

### What is ITIL?

Information Technology Infrastructure Library (ITIL) was created by the Office of Government Commerce in the mid 1980's and is a framework of best practices to manage IT operations and services.

ITIL's main objective is to align the business's objectives and strategy with Information Technology.

ITIL has now become globally accepted as the de facto standard for IT Service Management. Businesses who have adopted ITIL have proven that efficiencies are gained in the management of software, hardware and human resources resulting in continued and uninterrupted business.

## Reasons for Adopting ITIL:

### Improvement of Service

It is recognised that IT Services provided to the business have been poor due to the following reasons:

- Merger of departments and support teams with little communication to customers on staffs new roles and responsibilities
- Distribution of offices with no consistency in IT policies and procedures at these offices
- Increase in business size with no corresponding alignment with IT Services

This improvement can be achieved by adopting the ITIL standard which is followed by competent practitioners.

The absence of this standard has meant there has been no baseline to measure service against and improve on.

With the introduction of this standard a baseline can be established and measured and also compared against other service delivery departments in the industry.

### Improved Financial Management of IT

This will be achieved through better matching IT services to the overall needs of the business.

Through adopting ITIL the spend on IT will be fully accountable and attributed to the IT services delivered to the business. This will provide a full cost of ownership of IT services and also assist management decisions on IT investment by providing detailed business cases for changes to these services.

The scope of Financial Management in ITIL allows:

**Budgeting**

Through variable and fixed costs against cost types such as Hardware, Software, People, Accommodation etc.

**Accounting**

Through direct and indirect costs and unabsorbed overheads.

**Charging**

Possibility of billing internal customers for services provided.

**Improved relationship between IT and the business**

Through the need to deliver quality inputs to feed processes such as Change Management there is a requirement for increased levels of interaction and communication with IT staff which can only be beneficial to the business.

By providing an excellent quality of service through the alignment of IT Service Delivery and business demands this will also be seen on both a functional and process basis.

Adopting ITIL will encourage the business to integrate IT services into overall strategic planning using it to assist in delivering new services and products to sell to end customers.

**Process Benefits**

ITIL provides clear best practise processes with clear ownership and accountability for these processes. This allows improved support to other business units and their own processes.

**Reasons for Purchasing New Software:**

The reasons for the purchase of a Service Delivery tool include:

- To provide centralisation and automation of key service management functions
- To provide analysis of raw data
- To assist in the identification of trends
- To allow preventative measures to be implemented
- Increased sophistication in customer demands
- Increased business dependence on quality IT services
- Requirement for the integration of multi-vendor environments
- Increasing complexity of IT infrastructure requiring management tools
- Increased range and frequency of IT changes

### Drivers for Change (Business):

It has already been recognised that the perception throughout the business that the Quality of Service (QoS) provided by IT is poor. Discussion with managers of different business units and a recent customer survey highlighted the following issues:

- IT Support via telephone was variable with inconsistent response times (or no response at all) and inconsistency from IT staff in terms of how work was prioritised or carried out
- Calls not being logged correctly
- Reliance on individuals to carry out certain work resulting in staff absence or workload having an unnecessary high impact of quality of service
- Little or no communication from IT support staff
- No standard in how calls are prioritised
- No standard for escalation
- Lack of understanding of other business units roles and priorities
- Changes being carried out to services with no consultation or planning with affected business units resulting in loss of service at critical times
- Changes being carried out to services with no understanding of dependencies with other services

### Drivers for Change (IT):

The requirements for change have also been discussed in recent IT meetings with IT staff raising the following issues:

- No definition of service levels provided to customers resulting in disagreements in prioritising of calls
- No clear roles and responsibilities of support staff
- Escalation of calls impossible due to no clear structure of roles or responsibilities
- Little documentation of known bugs and processes and what documentation does exist is either inaccessible or held in disparate locations
- Experienced support staff having to resolve minor incidents
- No clearly communicated route for logging calls with support resulting in 'corridor attacks', 'shoulder tapping' or calls being initially logged through senior IT managers bypassing support completely
- Service Catalogue and CMDB not sufficient to have visibility of dependencies between services and configuration items
- Requirement to support major projects with no provision for resource or release into live environment

### Impact Analysis:

On analysis some existing IT processes already follow best practice standards to some extent, although on a very informal basis.

#### Processes

As such the initial business impact to formally adopt ITIL within IT is minimal. The requirement to invest in an industry best practice tool will reduce this impact even further and will allow IT to formally adopt these best practices.

#### People

There may be impact in encouraging all staff to adopt best practise and the usual initial resistance to change.

#### Training

Training on a new service management tool will be required. There would also be benefits to be gained from sending key IT staff in ITIL foundation courses and all staff on ITIL awareness courses (although this could be carried out in house)

#### Staffing

There is no change envisaged in the short term however this should be reviewed on an annual basis as a change to structure could be needed to reflect the adoption of ITIL processes

#### Facilities

There are no facilities requirements for this project

### **Project Scope:**

The improvement in quality of service delivered by the IT department to the business through the delivery of IT services to meet business needs, by effectively supporting the IT infrastructure, systems and services and the management of IT service provision.

### **Project Objectives:**

The objectives listed below will be used as a baseline to measure the success of the project. Each objective could potentially have its own scope, objective and deliverables

Implementation of a new Service Management Tool

- Identify the ITIL disciplines that are appropriate to the IT department and the business in general
- Implement the identified ITIL disciplines within an agreed timeframe
- Define Services provided to the business and identify stakeholders for those services
- Define Service Level Agreements for Services with the business and appropriate stakeholders
- Reduce business impact when incidents occur
- To set KPI baselines for IT Services and Support
- Provide management reporting based upon those KPI's

### **Deliverables**

The project deliverables will be set against the appropriate ITIL disciplines identified from the project objectives. The list below has been generated from ITIL disciplines that at this stage it is anticipated will be required.

#### **Service Desk**

- Provide a SPOC between IT support and users of IT Services
- Reduce costs through efficient use of resources
- Improve customer satisfaction with service delivered
- Eliminate 'corridor attacks' and 'shoulder tapping'
- Reduce business impact from incidents

#### **Incident Management**

- Restoration of normal service operation to users as quickly as possible and reduce time calls are open
- Ensure staff skill sets are used more efficiently
- Implementation of appropriate escalation routes
- Ensure incidents are consistently categorised
- Ensure incidents are handled within agreed SLAs
- Allow IT management to make sound decisions on resource allocation based on reporting provided on KPI's

### **Project Deliverables:**

#### **Problem Management**

- Ensure root causes of Incidents are identified and recorded
- Ensure Known Errors are then investigated and improvement actions initiated
- Ensure Known Error resolutions are published to the business
- Prevent re-occurrence of Incidents
- Improve communication of Known Errors and resolutions within IT
- Allow Incident handling staff to resolve a larger number of calls at first point of contact
- Allow staff with broader or more specialised skill sets to investigate more complex issues

#### **Change Management**

- Minimise the number of change related incidents
- Improve service quality and availability
- Apply standard procedure for all changes
- Resources to perform changes are scheduled
- Appropriate stake holders are involved in change decisions
- Communication of planned changes is made to the business
- Review of all changes is carried out post implementation

## Project Deliverables:

### Release Management

- Only correct, authorised and tested software will be installed in the live environment
- Software versions and licenses will be controlled through a Definitive Software Library (DSL)
- Hardware stock will be controlled through a Definitive Hardware Store (DHS)
- Communication will be improved between project development teams and support
- Appropriate documentation and training will be delivered to service users
- Training will be required to all appropriate staff

### Configuration Management

- CMDB will kept accurate and up to date
- Accountability and control over IT assets and configurations
- Ability to diagnose incidents relating to configuration items
- Accurate impact analysis for changes will be made

## Project Strategy:

### Rollout Strategy

Due to the size and complexity, the involvement required from all IT departments and consultation required with other business units this project will be rolled out through delivery in phases.

A project team will be appointed and will be responsible for managing each phase and to report on progress.

The project will also have phases for pre and post 'Go Live' The initial deliverables for 'Go Live' are Service Desk and Incident Management.

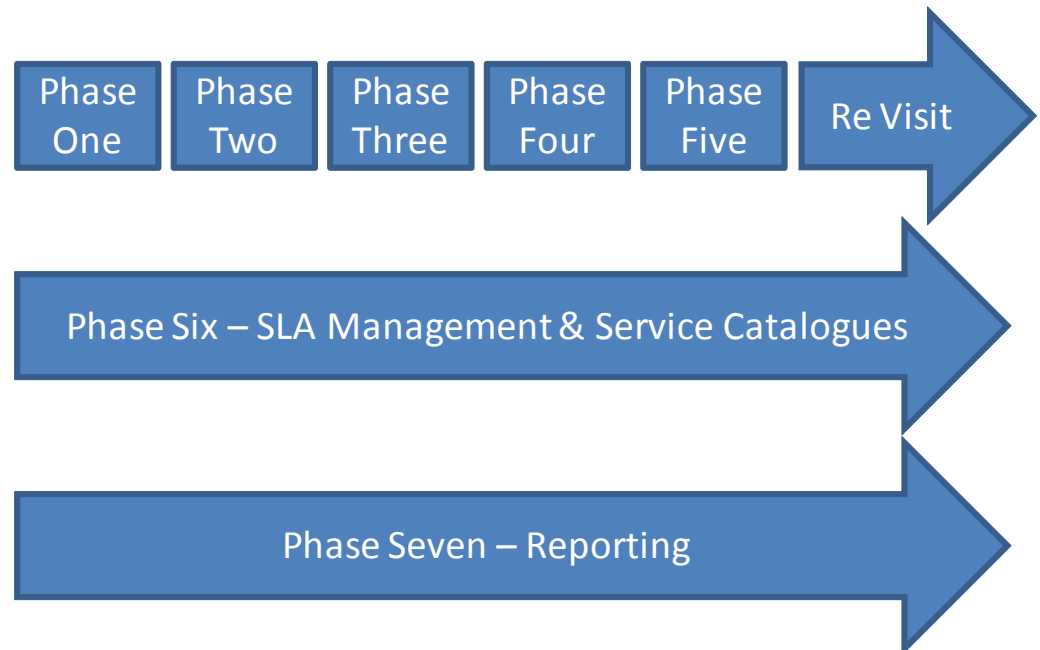
### Pre 'Go Live'



Phase 1 –Define Project Requirements \*  
Phase 2 –Assess products and vendors and purchase solution \*  
Phase 3 –Infrastructure Preparation (1 week)  
Phase 4 –Software Installation and Integration (2 weeks)  
Phase 5 –Perform UAT and Pilot (4 weeks)  
Phase 6 –Deployment (1 week)  
Go Live –Key Milestone 1

\* These phases have already been completed or part completed

Post 'Go Live'



- Phase 1 –Problem Management (Key Milestone 2)
- Phase 2 –Change Management (Key Milestone 3)
- Phase 3 –Release Management (Key Milestone 4)
- Phase 4 –Configuration Management (Key Milestone 5)
- Phase 5 –Project Review
- Phase 6 –SLA Management (Underpinning Phase)
- Phase 7 –Reporting (Underpinning Phase)

**Pre Go Live:**

**Phase 1 - Define Project Requirements**

Planning areas for project requirements include but are not limited to:

- Resources required (personnel, technical, facilities)
- Tools required
- Communication Strategy
- Training Requirements
- Investigate and rectify any existing process inefficiencies
- Identify KPI's and baselines for service support

**Phase 2 - Assess Service Management Software Vendors**

This phase involves an investigation of the market place for suitable service management tools which will meet the requirements of the projects. Each vendor will go through robust selection criteria as defined by the business procurement department. In brief each vendor will be required to demonstrate the following:

- That the product has been awarded Service Support Enhanced certification by PinkVerify™
- The product has a 100% fit with mandatory requirements in the selection criteria
- The product has an 80% fit with desired requirements in the selection criteria
- The product is business/process driven not technology driven

### Phase 3 - Infrastructure Preparation

The existing IT infrastructure will need to be assessed to check whether the technology and people will be able to deliver the project deliverables to the Go Live date. Actions that may be required are:

- Deliver training to appropriate personnel (e.g. ITIL training)
- Communicate relevant information to IT and the business at appropriate times
- Tidy up existing data (e.g. Active Directory data)
- Install required hardware or software (e.g. servers and operating systems)

### Phase 4 –Install Service Management Software

The chosen Service Management Software will be installed on the test/development environment and required integration with other business software. Actions that may be required are:

- Installation of service management software on test server
- Integration of solution with other business software
- Delivery of system training
- Data migration

### Phase 5 -Perform UAT and Pilot

Test data will be imported into the development environment and user acceptance testing will be carried out and measured against the project objectives and deliverables.

For Pre Go Live the only deliverables required will be Service Desk and Incident Management Deliverables

Once UAT has been completed and sign off obtained the solution will be recommended for migration to live environment.

### Phase 6 –Deployment

Service Management Software will be deployed into live environment.

## Post Go Live:

### Phase 1 - Problem Management

Problem Management will be the first ITIL discipline to be introduced once the system has been migrated to the live environment. It is likely to be adopted quickly as this process is already being done informally by some IT staff

### Phase 2 - Change Management

Change Management is likely to be a large project in its own right due to the buy-in required from senior IT management and the whole of IT within the business. The benefits of introducing change management are summarised in the project deliverables

### Phase 3 - Release Management

It is likely that Change Management and Release Management will be implemented as a 'pair' due to its close dependency on Change Management.

### Phase 4 - Configuration Management

Ideally Configuration Management should also be implemented with Change Management. It is proposed however to roll this discipline separately to allow staff time to adjust the changes already made and also to try to reduce any 'resistance to change'

### Phase 6 -SLA Management and Service Catalogue

This phase will be running in parallel to other phases for the following reasons:

- Involvement and negotiation will be required with other departments
- Both SLA's and the Service Catalogues will be 'works in progress' and will be introduced slowly to ensure quality of delivery
- They will provide the basis of KPI's and management reporting which will also be 'work in progress'

### Phase 7 –Reporting

This phase will also be running in parallel to other phases for the following reasons:

- Until management reports are being provided on a regular basis against good data it is anticipated that reporting requirements will change during the project
- Reporting may be required not just by IT management but by business management. These reporting requirements will invariably change once new disciplines are brought on-line

### Phase 5 - Review

It is not intended to get each phase 'perfect' first time but to introduce concepts slowly and simply. The project will be reviewed on a regular basis to take each discipline to the 'next level'.

### Project Team:

It is anticipated that the following roles will be required to ensure the success of the project:

- IT Director
- IT Manager
- Appropriate Business Managers
- Support Manager
- Project Manager
- Support Team Leader/Supervisor
- Service Desk Engineers/Agents
- Other Support personnel

### Cost Implications:

In order to obtain a true cost of ownership the following costs will need to be included in the project:

- Purchase of Service Management Software
- Purchase of new Hardware (e.g. servers)
- Purchase of new Software (e.g. Windows Server 2003, SQL 2003, Business Objects Enterprise)
- Consultancy costs for implementation of each project phase
- Training costs for staff (e.g. ITIL)
- Any depreciation costs
- Annual Support and Maintenance costs
- Upgrade Costs

### Cost Benefits:

The following calculations are based purely on the number of incidents logged with IT support on a monthly basis using a telephone service. This does not take into consideration the perceived 'value for money' from the business through improved quality of service or other cost benefits such as reduction in staff turnover which are a side effect of introducing ITIL.

Number of Incidents logged per month	2500
Current Cost per Incident <sup>1</sup>	£15.30
Total cost per month	£38,250
Industry average cost per incident <sup>2</sup>	£10.17
Savings per month	£12,825
Projected saving on industry average <sup>3</sup>	15%
Total projected savings per month	£16,638

<sup>1</sup>This has been calculated on the average salary of the support team and also the loss in productivity of average time a call is open against the business average salary.

<sup>2</sup>Taken from numerous industry white papers quoting \$20 per call

<sup>3</sup>Projected savings when implementing ITIL. User Self service has also been proven to generate savings of 15%-40% but this has not been included in this projected ROI.

### Risks:

The following risks have been identified:

#### Lack of Management Support

Senior Management buy-in is essential for the success of this project due to the change in working practices required.

#### Inadequate Training

In order for IT staff to understand the benefits that these changes would bring it is essential that they have visibility of ITIL and a basic understanding. Appropriate foundation and management courses are also essential to the success of the project.

**Resistance from business units to Services and SLA's**

There may be disagreement between business units as to what should take priority in terms of SLA's creating resistance from those who are used to 'shouting loudest'

**Ignoring users and key stakeholders during implementation**

It is tempting to generate a mindset that this is an IT project when its purpose is to improve quality of service to the business and thus should involve the business

**Staff bypassing established processes**

There is a risk that ITIL could be perceived as too bureaucratic resulting in staff bypassing the introduced processes.

**Assumptions**

The following assumptions have been made:

- This project will be limited to the implementation of a new service management tool
- The project will be limited to the launch of identified ITIL disciplines
- The project will launch these disciplines in a phased and controlled manner
- That necessary resource will be made available to the project team with effort made to minimise impact on their normal duties
- That relevant stakeholders will take an active role in the project
- That project sponsors support the project and resolve issues in a timely manner
- The project will not cover installation of any other software
- That no other processes will be implemented as a dependency to this project
- The project will not contravene any of the businesses policies or procedures

### **About ICCM Solutions:**

One of the overriding directives of ICCM Solutions is the simplification of complexity in Service Management environments. Founded in 1998 ICCM provides a global client base with sophisticated ITIL aligned Service Management Solutions built on Business Process Management (BPM) Architecture, from Metastorm BPM®.

The BPM platform provides ICCM clients the opportunities to implement and deliver successful technology strategies to ensure the collaboration between the business and IT – ultimately reaping the rewards of business innovation and competitive advantage.

ICCM's software allows organisations to support and drive best practice, via a turnkey technology, and is available as a 'Commercial off the Shelf' Solution.

ICCM Solutions was named a Gartner 'Cool' Vendor in 2010.

[www.iccm.co.uk](http://www.iccm.co.uk)

### **About Bytes:**

Bytes Systems Integration designs, implements and manages customised IT solutions through the integration of hardware and software systems from global technology leaders. It has five distinct business units, all providing clients with world-class solutions and services based on platforms, processes and methodologies from acknowledged industry leaders. They include SAP, Kronos, Microsoft, MTN, Motorola, Cisco, Enterasys, SAP Business Objects, Honeywell, Symantec, HP, Wonderware,, IBM, Oracle, Juniper, ICCM, and the sole distributor for Teradata in South Africa.

The company is part of Bytes Technology Group, which is wholly owned by JSE-listed Altron.

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