Choosing an ITSM Solution: What you really need to know

I work with a lot of organizations who are looking for new ITSM solutions. They struggle with the amount of information being thrown at them from a slew of self-professed ITSM experts. We also receive pages and pages of RFP questions that take the organizations weeks, even months, to compile, which we then receive and spend weeks responding to questions about features and functionality the organization will never, ever use.

To simplify things for us all, I thought I would cut through the marketing hype and provide some insight into what you really need from a new ITSM solution. Every vendor worth discussing has integrated Incident, Problem and Change Management, so you can be confident you won't lose your job selecting any of the vendors recommended by industry analysts. The question you need to ask yourself is, what does the vendor offer that stands out, that will really have an impact on your IT organization, your customer base and your day-to-day life?

There are literally hundreds of service desk and help desk software applications available, so choosing the right one for you organization can be a challenge. It can be difficult to know where to start when evaluating your options. The last thing you want to do is select the wrong software, as this can lead to frustrated help desk employees, reduced customer satisfaction and may have a detrimental effect on your business.

For most companies, the service desk is the initial contact point for end users who seek assistance and support, which makes it a vital component of any service strategy. Service agents provide support across multiple platforms. The service desk software manages incidents and service requests throughout their lifecycles, ensuring every problem is resolved in a timely manner. Since even the slightest hiccup in support procedures can result in dissatisfied users, service desk software is a valuable tool for all types of businesses conducting internal and/or external support networks.

What do you need from your service desk software?

You should consider your requirements and IT capabilities before you assess service desk software in order to ensure the software meets your needs.

Every solution you evaluate should manage and track your incidents and service requests, which goes without saying, but how easy is it for your employees to log their incidents? Does the vendor provide a self-service portal? What about online chat or a knowledgebase? Do you want to automate service delivery so that with one click of the button employees can request applications and have them appear on their desktop in minutes? How easy is it for you to get reports? Can you easily see what analyst has the most incidents in their queue? There are a million questions to be asked before you start looking at the software.

Here are the major considerations:

1. Easy installation of software

Ask the vendor how long the average implementation takes. My rule of thumb for an easy-to-use configurable solution is five days per process i.e. five days for incident management, five days for change management, etc.

2. Single user interface

You, and your users, will want to be able to access the software from whatever device you happen to be using, so look for a single-user interface across all platforms, windows, mobile phones and tablets. Ask the vendor how the interface is configured. You don't want to have to recreate the wheel and configure each separate interface for every device.

3. Intuitive and configurable workflows

The software should not only have the ability to record and track incidents and service requests, it should also be able to automate the assignments, actions and tasks related to them. You need to track the activity from start to finish and know where you are within the process, so look for a "quick view button" that shows where you are and what the next steps are. Also, ensure the user can look up the status of their incident or service request so that they are kept informed and do not have to call the service desk for an update.
Workflow configurability is huge. You need the flexibility to change the workflows as your IT organization changes. You will be using this software for at least the next five years and during that time, your IT organization will change and mature, so you want your workflows to change and mature with you. You want to ensure your administrator can make the changes since it is expensive to rely on outside consultants to configure your system.

4. Automation across the business

Another benefit of having a flexible, configurable solution is that you can take advantage of process automation across the organization. Your solution should not be limited to IT service requests. You can leverage the power of the process engine to automate employee onboarding, human resource processes, manage third-party vendor contracts and manage facilities requests and processes. I could go on and on with suggestions, but the list includes basically any business process that can be automated across your company.

5. Integration

Compatibility with existing applications is another very important requirement.
- Make sure the solution integrates with your corporate email system. You don't want your analysts copying and pasting email content into the ticket, and you should be able to dispatch emails from within the system.
- Another important integration is Active Directory so that you can have automatic imports of employee data into the service desk system.
- Finally, make sure it integrates with your desktop management software so that it is easy to populate your CMDB. This integration will help your IT organization contain costs and improve compliance with real-time view of all software and hardware assets in the network
- Integration with a desktop management solution automates the delivery of services from the service catalog. For example, if a user needs an application they can go to the service catalog, click on the application, and as long as they have the access rights, the application is delivered directly to their desktop. We are living in an age where we want to be able to request IT services the same way we go to iTunes to download music, providing automating service requests means your users get what they want without calling IT. The added bonus for IT is that automation reduces calls to the service desk.

6. Service Level Agreements

Look for a solution that provides easy to configure and manage service level management. Your IT organization is

responsible for delivering quality services to the business and to do that we need to have insight into how we are performing. You should be able to set independent SLAs with various levels of escalation and proactively notify technicians and management before and after an SLA violation and invoke processes when service commitments are at risk.

7. Task Management

You would not believe the number of organizations I speak to that create a separate Incident for each task that needs to be performed to resolve the incident, others assign the whole Incident to second Level and then lose visibility and control of the Incident. A much better approach is to have multiple tasks with multiple assignments under one Incident so that you can have deadlines and accountability assigned to each task.

8. Knowledge Management

A knowledge base is a must have to help in diagnosing problems and facilitating employee self-service. End users and IT staff should be able to perform quick and accurate automated knowledge searches. The knowledge base should also have a configurable workflow engine to ensure it follows the best practice process of review – approve – publish. The tools should also provide reports on knowledge use so you can track what articles are useful and what articles need to be revised or retired.

9. Auto Password Reset

This is a big money saver. One of the most common types of incidents are password resets, which in most organizations can range from 25 – 40 percent of all recorded incidents. If you are taking 600 password reset calls a month, this can equate to $45,000 a year in support costs.

Reporting and Metrics

This is my favorite one. Reporting should be easy to use. You are entering a lot of useful data into the system but it is pointless if you cannot easily access and present the information. The software should have multi-level reporting to provide visibility into your service desk operations. And it should track, analyze, and publish a variety of data, including drillable dashboards and SLA reports.

And there you have it. A short list of capabilities you should consider. As a final suggestion, I recommend asking the vendors for ballpark pricing, there is a huge difference in price based on how the solutions are licensed, whether they are subscription or perpetual licenses, whether the solution is hosted or on premise and how long it takes to implement the software.

Happy evaluating!