SDI
Service Desk Institute

10 STEPS TO SUCCESSFUL ITSM TOOL SELECTION

Inspiring service desks to be brilliant

INTRODUCTION

Replacing your IT Service Management (ITSM) tool can be a major project. It's likely to be disruptive but should bring significant benefits to your colleagues and customers. It's important to make the right decision, choosing a tool that will meet your technical requirements as well as finding a service provider with whom you can build a long lasting and productive relationship.

One of your biggest challenges will be convincing management to allocate the budget. For this you'll need a business case that explains the expected cost of the project, return on investment and tangible service improvements. Once funding is secured, you can start writing a 'request for tender' that details your requirements and sets out the process for choosing a supplier and product.

It's important to fully investigate your requirements at the start of the project: Speak to the service desk team, other IT support groups, and, of course, your customers. Research the market to understand changing trends and recent innovations. You should try to define not only what you want from the project from day one, but also what your organisation is going to need in 3 – 5 years' time. Here are 10 steps to help you with a successful tool selection process.

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As an IT manager and leader working in the aerospace, manufacturing, IT services and education sectors, Matt has developed a reputation for creating and maintaining high performing ITSM teams. In each team Matt has focused on building a brilliant service desk function: As the first point of contact, it defines the customer's perception of the whole department.

STEP 1
Understand your company

Many of the ITSM tools on the market will have the functionality you need. What differentiates them is the culture of the company; how they do business. You are embarking on a relationship that's likely to last at least three years, and therefore you should choose a supplier you're going to enjoy working with during that time. To do this, first understand your own company culture. Review your vision and mission statements and speak to senior managers. This will help you to identify like-minded organisations during the tender process.

STEP 2
Understand your requirements

ITSM tools have developed far beyond traditional logging and tracking of tickets. They can provide support for end-to-end service management processes, including problem and change management, they can automate workflow, increasing the efficiency and effectiveness of IT support, and they can integrate with other support and development tools. You may also be considering enterprise service management (ESM), integrating IT best practice into other departments, such as HR, finance, or facilities. If that is the case, it's vital that you understand each department's requirements and challenges.

Your requirements **could** include:

- A fully integrated ITSM tool to enable a joined up, holistic approach to service management and delivery
- ESM capability
- Automated approval and workflow
- Improved customer experience
- Clear and accurate performance information

STEP 3
Identify your critical success factors

It's important to understand how you are going to measure the success of the implementation. The first question to ask is 'why do you need a replacement ITSM tool?' Ensure you understand the scope of work, benchmark current performance and set realistic targets. You may be looking for improved customer service, faster incident identification and resolution, improved first level resolution rate and consolidation of the service desk as the single point of contact.

Here's an **example** of the top-level success criteria for your ITSM software project:

- Achieve high quality success and excellence through ITSM functionality
- Engage with an ITSM vendor with experience and capability to deliver large and medium-scale projects
- Work with a vendor partner with a track record of successful implementation of highly resilient and secure solutions
- Achieve a balance between quality capability (product and services) and cost efficiency
- Engage with a partner that is a good corporate fit in terms of size and profile

STEP 4
Plan your journey for implementation

The implementation of a new ITSM tool is a significant project, no different to any other IT project your organisation might undertake. Engage with colleagues in the IT projects team, if you have one. If not, speak to those colleagues with experience of running similar projects. Plan your project from procurement to implementation, taking into consideration the timescales for tendering and any key dates in the organisation's calendar.

Public sector organisations have stringent rules and regulations for procurement. The process may require a supplier to submit an 'expression of interest' before the bid. This is an initial stage of the tendering process that helps buyers to see who's interested in bidding and draw up a shortlist of possible suppliers. Following this, shortlisted suppliers will receive an 'invitation to tender' or a contract notice inviting them to bid for the contract. The procurement procedure is complex and time consuming, and can follow up to four different routes: the open procedure, the restricted procedure, the competitive dialogue procedure and the negotiated procedure. Equally, private sector companies have rules that must be adhered to, so do your homework and be thorough in understanding your organisation's procurement process.

STEP 5
Identify roles and responsibilities

Setting governance and ensuring you have the right people involved in influencing the decision-making process at an early stage is paramount to the success of the project. In addition to defining the service desk strategy, objectives, measures and benefits sought, you also need to secure the buy-in of other support teams and your key customers. In today's world with the rise of the knowledge base and self-service it is imperative that everyone is on side with the purchase. A good ITSM implementation may result in consolidation of a number of disparate systems in order to ensure 'one version of the truth', with all technical teams utilising the same solution. It is therefore essential to identify and include key users of the system at this stage and ensure all system requirements are captured.

STEP 6
Research, research, research

The ITSM software market is complex and competitive. Many tools offer similar functionality with few differentiators. None of the suppliers will be keen to tell you what their tool can't do. The only way to find out is to compare the different options. Fortunately, there is help available to support your research.

1. SDI Software Showcase

This one-day SDI hosted event is held 3 times a year in various locations around the country. It includes practical advice for selecting the right tool and live software demonstrations from up to 10 leading suppliers. Between presentations there's an opportunity to meet the suppliers, ask about their products and discuss your specific requirements. You will also meet other service desk managers who are researching the market.

2. SITS - The IT Service Management Show

SITS is a two-day trade show for ITSM professionals held annually in central London. The event attracts over 4,000 delegates who come to discover new tools, skills and connections, but more importantly to meet a wide array of ITSM suppliers who are showcasing their products.

3. SDI Online Software Exhibition

This online resource gives you access to videos of real-time software demonstrations from popular providers. The online exhibition is regularly updated with new videos and is free to access. Simply go to servicedeskdemos.com and create a login.

4. SDI Conference

This two-day event is also held annually and provides a fantastic opportunity to engage with hundreds of service desk professionals, meet software suppliers and listen to inspirational expert keynote presentations. The event also incorporates the IT Service & Support Awards.

5. PinkVerify

There are a number of independent ITSM tool research sites. One in particular is PinkVerify from Pink Elephant. It is an ITSM tool assessment service, providing certification against 15 ITIL processes. Please note that the supplier pays to be verified.

6. SDI's IT Service Buyers' Guide

This guidebook provides specifications for dozens of products and includes customer case studies. servicedeskinstitute.com/ITBuyersGuide

STEP 7
Engage with the experts

With so many ITSM tools available, choosing the right one can be time consuming and overwhelming. You may only get one chance to get it right, so make your task easier and reduce the risk involved by seeking expert advice.

SDI's Tool Selection service can be tailored to your specific requirements, offering a variety of options to support you at each stage of the project. This might include research and tender creation, tool selection workshops or full implementation. The tool selection workshops provide vendor independent advice on the complexities of the procurement process and give you recommendations from market experts on the options that are most suitable for your unique specifications and requirements.

There are a number of online forums with useful information and tips from peers. The SDI LinkedIn group is a good place to start. SDI can also connect you with other organisations that are using the ITSM solutions you're interested in and may be able to arrange a site visit. There are also a large number of independent ITSM consultants who can help with tool selection.

STEP 8
Create the right tender

Key to getting the right tool is a clear and comprehensive request for tender document. Below are some top tips from the experts:

1. Get advice from your legal and procurement teams - they will provide expert guidance based on your organisations code of conduct and financial regulations, and often have a template for the procurement document

2. Set out your procurement timetable including details on:

    *   Issue date of tender
    *   Submission deadline
    *   Evaluation date
    *   Dates for demonstrations
    *   Notice period
    *   Standstill period
    *   Contract award date
    *   Go live date

3. Include a contextual statement – provide background and context to your requirements. Include vision and mission statement, accreditations and future intentions

4. Provide a current overview of your service including details on:

    *   Structure and operating hours of service desk
    *   Current ITSM systems and system integration requirements
    *   Service Level Agreements
    *   Service performance metrics / growth targets
    *   Data migration and support requirements

5. Supplier ability - confirm the supplier's commitment to market and details of their account management approach

6. Functionality - list the modules that you require but don't get bogged down with detailing the fundamental functions for each module. Refer to PinkVerify Certification and only detail your 'above and beyond' or unique requirements

7. Detail your license requirements - length of contract, number of licenses, whether they are concurrent or perpetual and state if you require cloud based or on-premise solution

8. Provide details of what you require from the onsite demonstrations - set boundaries including how long the demonstrations will be. Ideally you want all vendors to demonstrate the same functionality so you can score them evenly

9. Scoring - ensure you can score consistently and compare like with like. You could set pass/fail criteria to ensure you only score vendors that can demonstrate they have, for example, the right number of PinkVerify processes; system integration capabilities and the right value insurance in place

STEP 9
Getting the most out of the demonstrations

On the day of the demonstrations, make sure you have the right people in the room. Ensure everyone knows what to look for and how to score against each of your criteria. A great tip is to time each section of the demonstration, this way the suppliers know they have to demonstrate their product clearly and concisely. Don't forget it's not just the functionality you want to see; you should also probe the vendor on their market commitment, escalation routes if you run into difficulties and how they will support your company's aspirations and growth in the future.
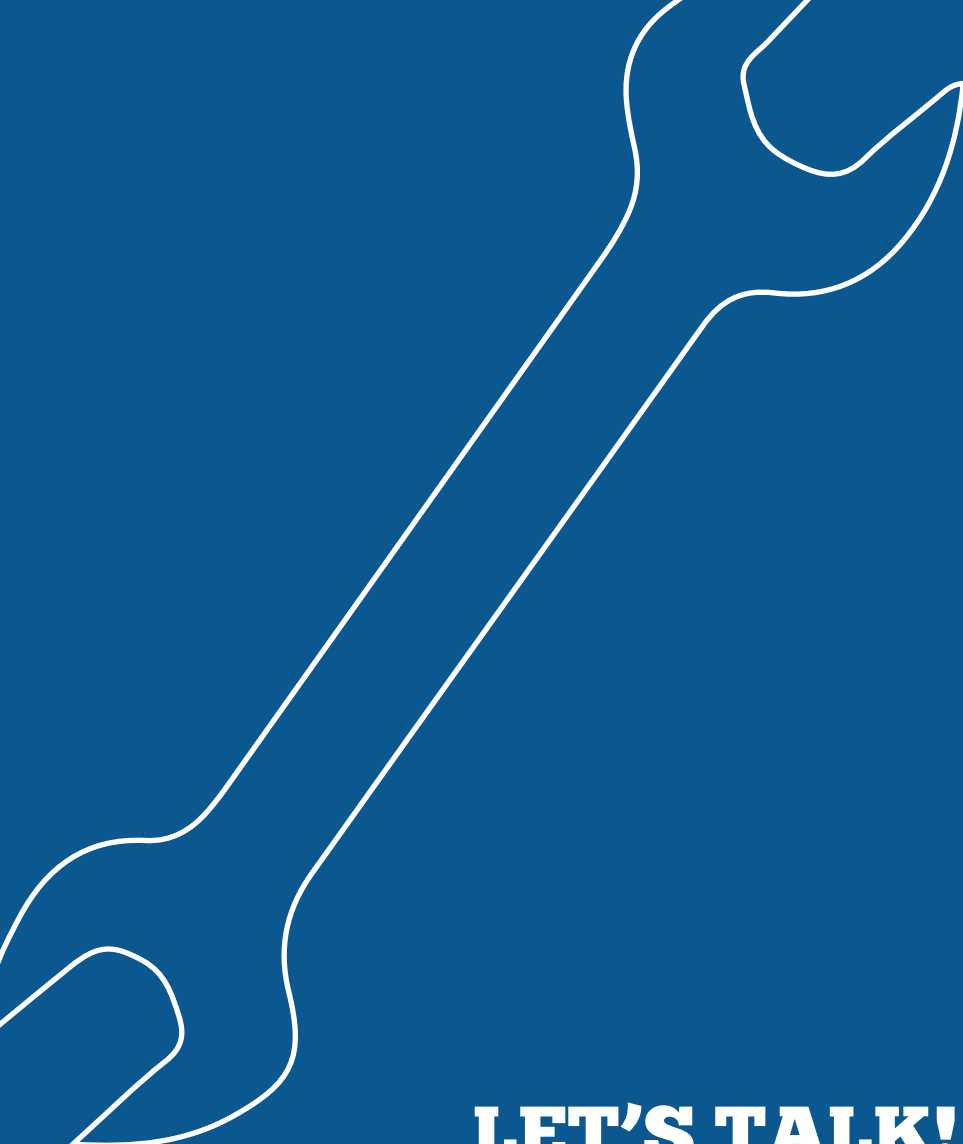
STEP 10
Prepare for implementation

So, you've conducted your research, attended events and engaged with the experts. You successfully navigated the tender process, shortlisted your top vendors and awarded the contract to your preferred supplier. Now starts the next chapter in your journey - you are ready to start your implementation project.

There simply isn't space here to address the implementation stage in all its complexity. However, having been so thorough in your efforts to select the right tool for your service desk, it is important to take the time to plan and prepare for implementation without losing momentum. Here are a few key questions to think about to help get you started:

- How will you assign roles and responsibilities for the project?
- What project management framework or methodology will you use?
- Who are your stakeholders?
- Who else needs to be consulted or involved?
- What timescales are you working to?
- Will you need additional resource or consultancy?
- Is there any budget assigned to this project?
- How will you measure the success of each stage of the implementation?
- Will service levels be impacted?
- What training and self-help guides will be provided to IT staff and customers?

With the right preparation and a clear plan, you can ensure that selecting the right software is just the beginning of a brilliant new era for your service desk.

LET'S TALK!

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