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# Measuring Success – Service Desk Evaluation Guide for the Midsized Business:

## How to Choose the Right Service Desk Solution and Improve Your ROI

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## Introduction

As IT budgets continue to fall under close scrutiny, it's more important than ever to ensure that software purchases are adding to your company's bottom line. Selecting the right service desk solution for managing your mission-critical operations can help you accomplish this goal. Selecting the wrong one can cost you.

You need a solution that delivers improved financial performance and increased manageability to your business, as well as organizational alignment that puts the right people and resources on the business issues that drive your top and bottom lines. This evaluation guide is designed to help midsized businesses to select the right tools to decrease your costs and improve productivity and service. To do that, we first explore the evolution of the help desk into today's service desk organization. Once you have an understanding of the evolving service desk, we will focus on identifying your own service needs and buying criteria. In this white paper, we provide a worksheet you can use to organize your needs and develop a scorecard. Step-by-step instructions for an in-depth evaluation are also included, as well as information on evaluating your selection. A methodology on calculating your return on investment is recommended at the end of the document so you can analyze cost savings and improvements.

This guide will be a useful tool in the process of analyzing and selecting service desk solutions. Overall, it will help ensure that you select the right solution for your business.

## Evolution of the Help Desk

Simply put, the help desk is an information-providing organization, developed in response to the growth of information technology. As computers became more mainstream and expanded to employees outside of the IT department, the need to "help" non-technical employees became immediately apparent. As the use of computers spread from IT to finance, sales, and beyond, the promise of increased employee productivity was over-shadowed by the increased need for technical support. Each advance in technology posed a new hurdle for IT support. First, IT began supporting a few users on mainframe terminals and printers. As the PC made its way into every office, IT formalized the help desk. As the evolution of technology progressed, employees introduced laptops and wireless devices into the working environment, providing greater mobility, but making it more difficult for technicians to provide good support.

As the help desk became a central call-tracking organization, smart business managers saw it as the central service hub for the management of all service issues. Other departments within the business that needed call tracking and service software were prime candidates for utilizing the same service desk application, allowing managers to reduce costs and improve efficiency. Utilizing a single service tool for facilities, human resources, purchasing, customer service, and even quality assurance allowed IT departments to standardize on a single solution that reduced software and maintenance costs and increased their return on investment.

In the last few years, companies worldwide have embraced the IT Infrastructure Library (ITIL®), as a set of best practices for managing IT service and support. This set of standards help organizations to develop consistent and repeatable processes for managing IT service and support. The improvements that organizations can make in the areas of incident, problem, change, configuration, and service level management are clearly the next step in the evolution of support operations.

## Understanding Your Needs

Understanding your needs and motivation for purchasing service desk software is very important — and often, purchasers don't take the time to really understand all the drivers behind the decision. Taking the extra time up front to evaluate and analyze why you need the software and what it has to do for you will save you time and money when it comes to implementation and training. Always survey the rest of your company and look for other departments or organizations that are considering service desk or workflow software.

### Reducing Costs Through Standardization

Not all service desk applications are flexible enough to meet the needs of different departments. When selecting an application, look for key elements that will allow the application to work successfully across different business processes. A flexible service request system readily adapts and responds to operational dynamics, meets the changing needs of the business, and guards against technological obsolescence. Here are a few of the most important features to look for:

> Group Security – The ability to set security based on individual groups allows you to manage each group of users independently.

> Segregation – To utilize the same central database, the application must have the ability to segregate information by department. For example, all departments may use the client information in the database, but the facilities requests for those users should not be accessible by quality assurance.

> Customizable Forms – Every group has special data requirements beyond the core name, rank, and serial number. A service desk application must have an easy-to-use and intuitive interface for creating and modifying entry forms specific to each group.

> Database Customization – Additional tables or columns are necessary to store special information required for each group.These custom data elements must use the same segregation rules.

> Flexible Business Rules – When business needs change, the business logic for your service desk application will also need to change. Look for an application that can adapt to the organizations unique business process.

> Accessibility – A browser-based solution is ideal for supporting many users from a central installation without requiring software on every desktop. A client/server-based tool will increase installation costs and limit accessibility to workstations that have client software installed.

### Operational Leverage

Operational leverage allows companies to do more with less, or in other words, enables them to experience an increase in quality and efficiency with a minimum investment. A good workflow solution helps you improve operational efficiencies across your organization and allows you to track and report on how those resources are being utilized. Knowing what assets and personnel resources you have and how they are being used is essential to increasing their efficiency. For example:

> People:
  Employees – hiring, promotions, terminations, and benefits
  Vendor Management – contracts, evaluations

> Places:
  Facilities and offices

> Things:
  Hardware and software assets, non-computer inventory

> Ideas:
  Knowledge Management, including policies and procedures

> Capital:
  Purchasing and Finance

A good service desk solution will provide reports that track these valuable resources and provide you with the information you need to manage them effectively. Deploying a workflow tool as part of the service desk initiative provides additional leverage through organizational alignment and putting the right people and resources on the business issues driving your top and bottom lines.

## Identifying Stakeholders

Identifying the stakeholders in the project and identifying their expectations and requirements for the system helps to reduce costs, build organizational alignment, and improve your return on investment. It also helps to ensure that you survey all departments, and take all requirements into consideration. Look for high-impact resources in departments, such as Legal, HR, Facilities, and Purchasing, that can improve productivity through the use of a centralized service and workflow application. Also, examine mission-critical operations that require high levels of service to determine whether they can benefit from this central service workflow tool.

By utilizing the tool across multiple departments you can:

> Reduce administration cost
> Reduce software license costs
> Improve service
> Increase productivity

Usually, the main stakeholders in the selection of any software solution are the IT organization, the service organizations (may be more than one, as identified above), and the business as a whole. Even so, the overall business needs are often overlooked, and selections are made based only on the feature requirements of each department. This is a major oversight. In selecting the right software solution for your organization, you should ensure that the business needs are clearly defined.

## IT Needs

IT concerns itself with the technical requirements of the solution. The central needs of the IT department focus on standardization and scalability, and include functionality such as:

> Integration with existing infrastructure
> Support with open System Architecture Standards
> Ease of implementation, maintenance, and upgrade
> Utilization across multiple departments

## Service Organization Needs

The needs of the organization providing the service will most likely revolve around ease of use, functionality, and training. In addition, key needs are:

> Intuitive interface that is easy to use
> Minimal training
> Integration with e-mail and other applications
> Access from anywhere

## Business Needs

Understanding your business strategy is key to selecting software that can be implemented quickly and that can provide real business benefits. The requirements of the business may depend on the industry, but the core components that most business managers are concerned about are:

> Increased productivity
> Improved internal and external service levels
> Exceptional ROI

Many applications fail — or become shelf-ware — because they attempt to meet every customer demand and address each and every area of the company. In this attempt, they become too large and complex, and many well-planned implementations fail. By focusing on the critical elements that make your organization run, and by simplifying your needs to focus on the basics, you'll increase your chances of a successful implementation and a faster return on your investment.

## Developing a Requirements Check List

### Features

Listed below are the most important and requested features in the selection of a service desk application. Collected from Requests for Information (RFIs) from midsized companies, some may be appropriate for your project and some may not. Use your knowledge of the business and the requirements for each of the stakeholders and add items specific to your business needs.

#### Usability

> Access through a Web browser

> Ability to create custom tracking fields

> Easily customized screens

> Simple user training

> Accessibility to persons with disabilities (Section 508 compliance — U.S.)

#### Call Tracking/Problem Management

> Support for core ITIL processes

> Ability to log and track issues within a central reporting database

> Functionality that supports both external and internal support

> Automatic problem identification

> Automatic generation of tickets

> Display of crisis issues to the user

> Support for service level agreements

> Ability to send and receive e-mail from the application

> Ability to create tickets from incoming e-mail

> Automatic routing of messages and updates

> Ability to forward requests manually and automatically

> Work group routing

> Work queue availability for each staff member

> One-button access to call history

> Classification of requests by categories (i.e., hardware, software, network, etc.)

> Ability to set priorities and severities

> Auto-escalation of requests using business rules

> Ability to attach documents to a request

> Ability to edit tickets as a group

> Log of time spent on each request

> Tracking of standard tasks based on type of call

> Event triggers based on type of request

> Work orders for dispatching maintenance/service technicians

> Automatic generation of multiple work orders for routine tasks (i.e., new hire)

#### Self-Service

> Self-service portal

> Customized end-user screens

> Ability to enter new requests

> Availability of status and updates of existing requests

> Ability to update contact information

> Ability to search knowledge base

> Access to Frequently Asked Questions

#### Knowledge Management

> Access to knowledge management

> Automatic use of problem description to search knowledge base

> Support for prebuilt knowledge bases

> Searches of indexed documents

> Searches of previously resolved requests

> Access to Frequently Asked Questions

#### Asset Management

> Vendor contacts and information

> Record assets and features

> Tracking of history of each asset

> Linking of assets to tickets and work orders

> Application of business rules to assets

> Software compliance and optimization

> Preventative maintenance schedules

#### Change Management

> Out-of-the-box ITIL best practices

> Customizable workflow

> Assessments and approvals

> Recording capabilities for rollout and backout plans

> Display of schedule of changes

> Notification through e-mail and pagers

> Linking of change requests to inventory

> Integration with problem management

> Purchasing

> Purchase requests

> Integration with asset and vendor management

#### Reporting

> Management dashboards

> Prebuilt standard reports

> Flexible reporting package

> Real-time graphical reports

> Custom queries/macros

### Integration

- > Integration with e-mail and pagers
- > E-mail conversation management
- > Integration with remote control
- > Integration with computer telephony
- > Integration with wireless devices
- > Integration with standard automatic inventory tracking packages
- > Integration with bar-code scanners
- > Interface to integrate with external data

### Implementation

- > Quick and easy implementation
- > Drag-and-drop customization
- > Point-and-click business rules
- > No required client software
- > Support for open standards
- > No required programming for form or database customization

## Technical Support

In addition to researching product functionality, it is also important to evaluate the support options for every vendor. Look for a vendor that provides multiple support levels and gives you the freedom to select the right option for your business. One-size-fits-all is not applicable to most companies' technical support needs. When selecting the proper support levels, consider the following:

- > What mission-critical areas of the business will the service desk application support?
- > Are you planning to integrate other applications with your service desk application?
- > Do you require support 24x7?
- > Do you need a technical account representative that knows your implementation and configuration?

Another important item to look for when evaluating support is whether or not the vendor has an independent third-party measured customer satisfaction program. Ask them if they survey customers on service and product-related issues, such as ease-of-use, price, etc. A world-class support organization will provide information on both service levels and customer satisfaction to buyers who are seriously considering their solution.

## Service

When selecting a new tool, do not underestimate the value of both professional services and consulting to the achievement of your business goals. A well-seasoned expert can keep your project on schedule and under budget. Look for vendors that have been in the service business for a considerable amount of time and have developed best practices that help you get the most from their solutions.

## Training

You should never skip training or make the mistake of thinking you can train people yourself. If a vendor does not provide training, move on to someone that does. Most vendors provide classroom training for clients at a central location. Although this is adequate for basic generic product training, it does not address your individual training needs or user environment. Ask if the vendor will provide training at your site. You will not only get your users up to speed quickly, but you will also build their trust in the system and encourage them to embrace the project, ensuring its success.

## Prioritizing Your Needs

Once you have identified the stakeholders and determined their needs, you must prioritize their requests. Some items may be nice to have while others may be absolutely necessary. Review these with each organization to determine their importance.

Use business requirements as the yardstick by which you measure each feature's priority. A Needs Assessment and Prioritization worksheet, like the one on the following page, will help to organize and prioritize the requirements for each group of stakeholders. Since each organization must contribute to the overall business success, the business needs are listed across the top and the requirements of each organization are listed down the left-hand side. An organizational requirement that meets all business needs is considered essential or high priority.

### Needs Assessment and Prioritization Worksheet

| | Business Need No. 1: Improves Productivity | Business Need No. 2: Improves Service | Business Need No. 3: Improves Costs | Business Need No. 4: Improves ROI |
|---|---|---|---|---|
| **IT Department** | | | | |
| Integrates with existing infrastructure | X | | X | X |
| Supports open-system architecture standards | X | | X | X |
| Easy to implement, maintain, and upgrade | X | X | X | X |
| Can be utilized across multiple departments | X | | X | X |
| Reliable with minimal downtime | X | X | X | X |
| **Help Desk Department Requirements** | | | | |
| Easy-to-use intuitive interface | X | X | X | X |
| Requires minimal training | X | X | X | X |
| Integrates with e-mail and other applications | X | X | | |
| Web-based access | X | X | X | X |
| **Human Resources Requirements** | | | | |
| Customizable entry fields | X | X | | |
| Accessible from a browser | X | X | X | X |
| Central database repository | | | X | X |
| Segregation of sensitive data | | X | X | |
| **Facilities Requirements** | | | | |
| Tracks inventory and assets | X | X | X | X |
| Integrates with bar-code scanner | X | | | X |
| Supports wireless integration | X | X | | |
| Work-order management | X | X | X | |

## Evaluating Potential Vendors

Once you have prioritized your organization's requirements, you are ready to begin evaluating potential vendors. Remember, you are not only purchasing a product, you're building a relationship with the vendor you select. Selecting the right vendor can mean a long and beneficial partnership that will help you grow your business. The following questions will help you to judge the strength of the company you are considering.

> How long have they been in this business?

> Do they have a proven track record?

> Is the company financially strong? Do they have the backing to continue research and development?

> Does their product porfolio contain software to meet the needs of different size business or is it "one sizes fits all?"

You will want to select a vendor with stable financial support and many years of experience in the service desk industry. Look for companies that provide for a growth path in their applications and can provide more robust tools and features as your organization grows and matures.

## Estimating Your Return on Investment (ROI)

Do not wait until you have implemented a service desk system to start calculating your return on investment. ROI is an important tool to help you understand the true cost of the solution and can be estimated prior to selecting or implementing a solution.

To calculate your ROI, you will need to gather or estimate data about the service organizations. Some of this may be readily available and some may require your best guess.To help you get started, we have provided industry estimates as compiled by The Help Desk Institute and Help Desk 2000 worksheet on the next page. For a complete Online ROI Calculator, visit www.bmc.com.

### ROI Worksheet

Once you have collected the required information, you can calculate your estimated ROI. BMC has developed a rapid ROI calculator to help you estimate your return. You can ask a BMC account manager to sit down with you to complete an in-depth ROI specific to your business environment.

By doing some analysis up front, and by understanding stakeholders requirements and measuring each feature's priority against your business goals, you will be better prepared to select the right service desk application. Evaluating support and service options and the financial stability of each vendor will allow you to select the best partner and ensure that your service desk project is successful.

## ROI Worksheet

| | | |
|---|---|---|
| **Cost of a Self-Help Resolution**<br>Estimated cost to process and resolve a self-help ticket. Industry analysts estimate this cost is approximately $11. | $ | |
| **Cost of a Level 1 Service Call**<br>Industry analysts have estimated this cost to be approximately $30. | $ | |
| **Cost of a Level 2 Service Call**<br>Industry analysts have estimated this cost to be approximately $50. | $ | |
| **Cost of a Level 3 Service Call**<br>Industry analysts have estimated this cost to be approximately $100. | $ | |

| | BEFORE | AFTER |
|---|---|---|
| **Percentage of Calls Reduced by Self-Help**<br>Estimated percentage of calls eliminated by the use of self-service capabilities and/or automation. Industry analysts estimate that 15-40 percent calls can be reduced through self-help. | % | % |
| **Percentage of Calls Reduced Due to Using a Knowledge Base**<br>Estimated percentage of requests that can be resolved at Level 1 before and after implementing a service solution. Industry analysts estimate 65-80 percent. | % | % |
| **Percentage of Calls Resolved by Level 1**<br>Estimated percentage of requests that can be resolved at Level 1 before and after implementing a service solution. Industry analysts estimate 65-80 percent. | % | % |
| **Percentage of Calls Resolved by Level 2**<br>Estimated percentage of requests that can be resolved at Level 2 before and after implementing a service solution. Industry analysts estimate 15-25 percent. | % | % |
| **Percentage of Calls Resolved by Level 3**<br>Estimated percentage of all requests resolved at Level 3 before and after implementing a service solution. Industry Analysts estimate 5-10 percent. | % | % |

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## About BMC Software

BMC Sof tware helps IT organizations drive greater business value through better management of technology. Our industry-leading Business Service Management solutions ensure that everything IT does is prioritized according to business impact, so IT can proactively address business requirements to lower costs, drive revenue, and mitigate risk. Known for enterprise solutions that enable IT to manage across the complexity of diverse systems and processes, BMC also delivers targeted solutions for the small to midsized business, addressing the challenges unique to this market — from Service Support to Identity Management to Application Monitoring. Founded in 1980, BMC Software has offices worldwide and fiscal 2005 revenues of more than $1.46 billion. BMC Software. Activate your business with the power of IT. For more information, visit www.bmc.com.



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