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Best practices for ensuring a successful ITSM implementation

How to set up your ITSM strategy
for long-term success

In this eBook we explore what long-term success looks like in ITSM. There's a quick refresher on ITSM, its principles, and its purpose; a deep dive into the reasons implementations fail; and a focus on best practices for a modern ITSM approach. That way, you can be sure the way you're working is fit for today and the future.

Finally, we'll explain how Adaptavist can help you stay ahead of the curve – whether you're setting up your first ITSM solution or migrating an existing one.



Best practices for ensuring a successful ITSM implementation



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What does modern ITSM look like?

Is your IT Service Management (ITSM) strategy up to scratch? Most forward-thinking organisations have been following ITSM principles for a while now – so chances are it's nothing new – but is your approach truly fit for purpose?

ITSM forms the backbone of most enterprise IT organisations. While it used to be a way of handling internal and external customer issues, it now encompasses a whole array of practices that have a big impact on customer satisfaction. Some ITSM tools were developed in the 1980s, so what was once considered best practice is likely out of date. The key tenet of ITSM is continual service improvement, you need to be updating your ITSM provision to ensure you are providing the best customer experience and driving real change.

A modern ITSM implementation - or overhaul - means:

- **Empowering all levels of your business:** equipping everyone with the tools and knowledge they need to solve their own tickets and keeping escalation to a minimum.
- **Embracing 'change enablement':** where all changes made benefit the whole organisation, improve the customer experience, and are everyone's responsibility.

- **Automating routine tasks:** to help teams eliminate human error and cut down time-draining, repetitive tasks so they're free to focus on more strategic projects.
- **Fostering collaboration:** traditional ITSM supports cooperation, where teams are not fully aligned in terms of their goals, but modern ITSM fully supports collaboration.
- **Fit for purpose tooling:** it's hard to let go of legacy systems, but without the right tools your ITSM strategy will struggle to deliver impact and lasting change.





Part one

What is ITSM?

ITSM refers to the way IT teams manage the delivery of their services by following repeatable procedures. This includes all the end-to-end processes and activities needed to design, create, deliver, and support IT services. ITSM regards everything IT does as a service.

A service desk sits at the heart of ITSM – it's what employees use to interact with the IT team. The service desk offers a self-service approach to information and knowledge management. It's a single portal where everyone can access the information they need to support themselves.

Why do we need it?

Keeping pace with evolving technological advancements is vital to retaining a competitive advantage. Efficient management of IT processes means increased productivity, improved customer satisfaction and retention, and reducing unnecessary financial losses. ITSM is a proven way to ensure consistent and smooth management and delivery of IT services.

The need for this might be less obvious in a small company, but in an enterprise organisation, where IT personnel support hundreds or thousands of employees, ITSM enables staff to keep track of requests, prioritise them according to urgency and importance, and deliver crucial services.

Three key business drivers for ITSM are:

- 1. Standardising your processes:** ITSM eliminates guesswork and individual decision-making, two big causes of miscommunication and discord within any organisation, and replaces them with a framework of standardised processes. This enables effective collaboration and reliable decision-making.
- 2. Focusing on more strategic tasks:** ITSM enables IT teams to shift their attention from minor incidents to critical issues, so you get the most value out of your people. Simple tasks like requesting information and resetting passwords, for example, can be resolved using a self-service portal.
- 3. Making data-driven decisions:** Rather than making assumptions about your IT service and your organisation's needs, ITSM provides you with real-time insights. This data enables smarter decision-making so you can make adjustments that will have a real impact.

The four dimensions of ITIL 4

ITSM is typically based on ITIL 4, an evolution of the longstanding ITSM framework. This latest version is designed to move organisations away from the prescriptive requirements traditionally associated with ITSM towards a more flexible way of working.

ITIL promotes a holistic approach when designing your service offering, where all the components that make up an organisation must work together to create value. It references Four Dimensions, an evolution of the 4 Ps of Service Design, which are needed to deliver quality services.

People are at the heart of successful service design. You need to know what your customers want and how they experience your service to **create something that will work for them.**

Let's take a look at the four dimensions:

1. Organisations and people

People are at the heart of successful service design. You need to know what your customers want and how they experience your service to create something that will work for them. You'll also need a proper structure in place with the right staff levels and capabilities to design and deliver it. That means adequate training and the appropriate expertise to make it a success.



Ask yourself: does our corporate culture support the company's objectives? Do we have the right number of people with the right skills to provide a seamless service?

2. Information and technology

Choosing the right underlying technology is paramount when it comes to the tools and measuring processes that are required to deliver the expected outcomes and test whether they're meeting business

requirements. While you will need an appropriate environment, infrastructure, apps, interfaces, and data sources to underpin your design, it's important to balance performance, features, functionality, and budgets when making your choice.



Ask yourself: do we have the right technologies to manage and evaluate our services?

3. Partners and suppliers

Here we're referring to internal and external suppliers; these might be strategic, operational, tactical, or commodity. A service provider might not be able to meet all their customers' needs, so third-party providers can be used to help translate customer requirements. Maintaining a good relationship with third parties is vital, and service-level agreements (SLAs) ensure that everyone knows what's expected from the customer and the supplier.



Ask yourself: who are the suppliers involved in the design, deployment, delivery, support, and continual improvement of our services. What is their relationship to the organisation?

4. Value streams and processes

This dimension looks at the actual service design activities, such as identifying an applicable design model, planning, executing,

and reviewing the design. It's important to clearly define the processes, roles, responsibilities and requirements up front and address any dependencies in the value stream so that the service design stage can deliver efficient outcomes.



Ask yourself: where are our dependencies in the service design value stream? Who will be responsible for which activities and who will be accountable?





Part two

Why do ITSM implementations fail?

ITSM done well empowers your employees, ensures you get the most out of your IT tools, and allows your business to thrive – all great news for customers. But holding on to traditional ITSM principles that fail to live up to modern organisational demands can hold businesses back.

Luckily, there are some **common pitfalls to avoid** – or to identify – that can get your ITSM set-up out of murky waters and back on dry land.

Hierarchies hold up ticket approval

When tickets come in, where do they go? If yours get tied up going through too many people before they're approved, your mean time to resolution will be much higher than necessary. A good management service system avoids this hierarchical chaos and helps you resolve tickets much more quickly without information getting lost along the way.

Lack of collaboration

Without regular communication across different departments, there's often not enough context to resolve tickets. It's important that teams and individuals are not stuck only working on fixed responsibilities, and that they have the opportunity to widen their focus and find out how people are working across the business. With more context, issues can be fixed more easily and effectively.

Dated knowledge management practices

Traditional ITSM tools aren't designed for intuitive knowledge sharing. With a 'come and ask me' approach, peer-to-peer knowledge sharing is easy. Rather than article dumps where no one knows where to start, employees are encouraged to find the answers they need, connecting people across the organisation and leaving them feeling empowered.

Legacy tools are letting you down

Beyond poor knowledge sharing functionality, traditional ITSM tools are rigid and harder to customise – hardly ideal for a fast-paced market. They also won't work seamlessly with the tools your developers depend on day to day, meaning an extra step is often required between the ticket arriving and it being added to their backlog. This switch between programs can cause information to get lost, meaning the customer has to wait even longer for their issue to be resolved.

Design without the customer in mind

If services are designed around the people who deliver them, rather than the people who use them, you're going to come up against some big blockers. Considering the customer experience – their needs and the way they work – and building the service desk and any other tools around that is vital for a successful implementation. It's not too late to reassess if your service is already up and running. Remember to think about the key outcomes your ITSM solution will deliver first, ahead of the technical aspects and IT team's requirements.

Forgetting the whole value stream

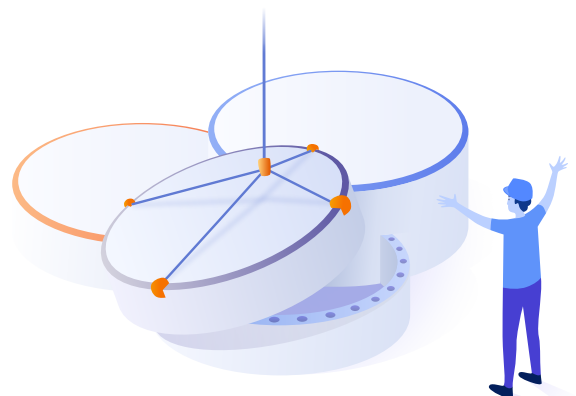
Seeing a service in isolation is problematic – it will inevitably result in missing key handovers and integration points. Thinking beyond the service provider and service user to consider the wider value stream will make any service more successful. For example, a new user will need a login, but before they can get set up, procurement might need to order them a laptop, and facilities management might need to create a key card to let them in the building.

Not thinking long-term

Working with agility is great, but the big picture should always be in view. Making quick fixes to a service to solve immediate issues could cause significant wasted time and effort down the road if the service fails to align with wider business goals.

Choosing the wrong tool

If you didn't perform a tool assessment ahead of time, you might have ended up with an ITSM solution that doesn't match your organisation's needs and causes implementation havoc. It's important to know what you need and look at the features different solutions offer. Another consideration is how much support the vendor offers and their reputation. You don't want to get saddled with an expensive tool that won't be updated over time.





Best practices for ITSM implementation

To transition to a modern ITSM approach, you'll want to work through the following key stages:



1. Designing

This is where you capture the processes and people involved to ensure the service you're planning aligns with what your customers need.



2. Creating

To build a service that meets expectations, your approach should be agile and incremental, and include frequent feedback loops.

- You'll need a service desk – the business facing element of your service – to support your workforce, especially if it's remote or widely distributed. This should be as easy as possible for stakeholders to interact with.
- Next is a robust knowledge management system for effective self-service. This can prompt users to fix issues themselves when they raise a ticket, taking pressure off staff and reducing resolution time.



3. Delivering

Once built, the service needs to be delivered to customers, validating that the solution delivers exemplary customer service.



4. Supporting

Once live, you'll need to continue to support the service to ensure its success. This includes adjusting quickly based on data analysis. Your service catalogue should be kept up to date. Think of it as a dynamic, living document that matures as your services do.



5. Managing

You'll then need to manage the service, iterating on the foundation you've built and driving further efficiencies while adopting a culture of continual improvement. Don't lose sight of the data – keep measuring to make sure the way your IT service operates reflects your organisation's needs. This proactive, rather than reactive, approach will ensure your service is a success.



6. Continuous service improvement

Finally, it is fundamental throughout the implementation process, to ensure the continued alignment of all the ITSM services with the organisation's requirements. This will include realigning to changes in organisational context as well as the overarching principle of always striving to improve existing ITSM services. Any improvement initiative

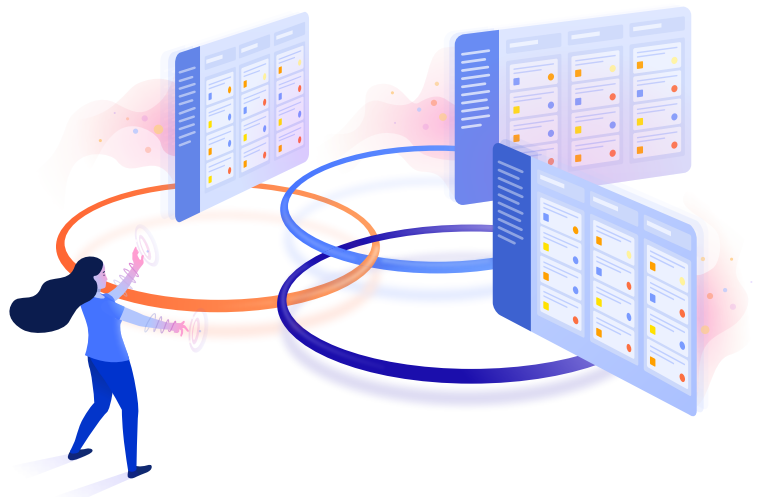
should make sure the objective is clear. The following Deeming Cycle is often used as a framework.

- **Plan** for the change and identify the improvement opportunities.
- **Do** implement improvements.
- **Check** the improvements have achieved the expected results.
- **Act** on the results - including accepting that not all changes achieve the expected outcome and thus you may need to plan again.

This approach enables the process to adapt according to changing requirements whilst also reducing the risk of services becoming stale or inefficient.

In ITIL 4 Continuous Service Improvement was made central to the Service Value System and should be applied across all areas used to create, manage or support services.

Take a look at the ITIL Continuous Service Improvement model on page 17.



ITIL Continuous Service Improvement model



ITSM is all about shifting left – equipping everyone across the organisation, so they can solve tickets themselves instead of escalating.

Bringing out the best of your ITSM

As we just mentioned, continual improvement is key for your ITSM strategy to stay ahead of the competition and work well for your organisation. That means following a few best-practice approaches from designing through to managing your service.

Empower everyone

ITSM is all about shifting left – equipping everyone across the organisation, so they can solve tickets themselves instead of escalating. That means sharing quality, up-to-date information wherever possible, and providing accessible and effective service desks and knowledge management systems.

Embrace change enablement

ITIL 4 redefined 'change management' to 'change enablement', because 'change management' was seen as a hindrance to change, where 'change enablement' focuses on facilitating change. With this update came a move to ensure the right level of governance was in place for each change. This reduced the risk that change could be roadblocked

by just a few senior people as a top-down approach, due to the 'change management' process. With this approach, changes are categorised based on their level of complexity and urgency to benefit the wider organisation and improve the service you provide for your customers.

Routine low-risk changes can be made without new authorisation, while medium-risk changes follow an assessment and authorisation process. High-risk changes, like a serious incident or carrying out a security patch, are the ones where a change advisory board or change authority steps in before they're implemented. Emergency changes will still follow a process but some of the approval may be retrospectively applied.

Lean in to automation

Automation is what takes the pressure of time-draining, repetitive tasks off your teams and frees them up to focus on more important projects. It eliminates the possibility of human error and of tickets being misplaced. Tools like Jira Service Management (JSM) offer automation features to help your support team manage tickets – whether it's routing tickets to the right person, sending alerts to make sure high priorities are taken care of, or automatically assigning tickets based on keywords.

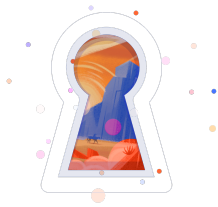
Support collaboration

Without collaboration, your ITSM approach will be stuck in the dark ages – and you can forget being able to provide an excellent customer experience. Make sure all your teams have the tools to communicate easily and share information. This kind of open communication enables cross-team collaboration, more effective solutions, and faster response times for customers.

Make more of modern tools

Replacing legacy systems isn't easy, but it's essential if you want to modernise your ITSM provision. These tools will give your teams what they need to implement the techniques described here – and avoid some of the pain points. They should integrate with your other essential tools, offer cross-platform availability, be flexible, customisable, and easy to maintain, and allow you to monitor security risks and secure your data. Unfortunately, traditional tools just won't cut it.





Conclusion

Getting started with ITSM

Implementing change across a large organisation is difficult, especially if you try to go it alone. But with the help of trusted experts like Adaptavist, it's possible to migrate your existing ITSM solution or set up something new, ensuring modern ITSM principles, practices, and tools are at its heart.

As a world-leading Atlassian partner, our solutions include everything your organisation needs to make the most of modern ITSM.

We conduct a readiness assessment using a tried and tested blueprint to understand where your business is at in its digital transformation. Our experts will advise on what steps to take – either replace, renew, enhance, rebuild or sunset your existing service offering.

Then we design a tailored strategy and help implement it across your business. We can also help with the migration, maintenance, and management of your set-up, optimising what's on offer to serve your customers better.

At Adaptavist, while we know that tools alone won't transform your ITSM strategy, we're proud to recommend Jira Service Management (JSM) to our clients. It's packed with powerful features, many you might recognise from Jira Service Desk, including automated risk assessments and ticket categorisation. And because JSM is built on the same platform as your Jira software, collaboration and adoption is so much easier.



At Adaptavist, we have a team of experts ready to help you unstick your IT service management strategy and catapult it into the future. Get in touch with our experts today.

adaptavist.com/itsm



We help organisations transform to continuous change being their business as usual. We do this by supplying technology, providing advice, and delivering change through modern, iterative approaches to development, deployment, and application lifecycle management.

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