

Using ITinvolve: With a third-party ITSM or Service Desk solution

The Business Challenge

Many IT organizations spend significant time and effort getting their current IT service management (ITSM) or service desk solution up-and-running. Yet many also continue to struggle with accurately assigning tickets to the right individuals, suffer too many outages or performance degradations from IT changes, and have a recurring problem backlog that continues to grow faster than they can reduce it. While these IT managers often want to take a different and more modern approach to these issues, they simply can't part with or discard their existing investments either.

IN THIS SCENARIO

An IT organization leverages the power of social knowledge management and collaboration in combination with its existing ITSM solution. The IT management environment includes a configuration management database (CMDB) that is used by the service support team as well as data and information that are scattered across Visio diagrams, Microsoft SharePoint sites, and Excel spreadsheets among a variety of individuals.





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In this scenario:

1. Terry is a first-level support technician, whose job is to quickly resolve basic support issues and assign more complex issues to the right second or third level support personnel.
2. Charlie is a change manager, responsible for documenting change requests, obtaining appropriate approvals, and ensuring the successful execution of IT infrastructure changes.
3. Peter is a problem manager, responsible for identifying the root-causes and finding permanent resolutions to recurring incidents

How Poor Visibility and Scattered Information Impacts the IT Team

A typical day for Terry will involve resolving a dozen or more basic support issues and assigning several more complex issues to other more senior colleagues. Terry's manager frequently discusses the importance of correctly assigning these complex issues to the right individual the first time, so that they don't have to be re-assigned to others, which reduces overall productivity and delays resolution. Unfortunately, Terry and her manager find that she is only able to get the ticket assigned to the right team a little more than half the time, and she struggles to identify the right individual within those teams most of the time. Terry is frustrated because she wants to be effective in her role and knows that her ability to correctly assign tickets to the right individuals is important to her company.

Charlie's personal goal and his manager's goal are for a 100% change success rate, meaning that all changes are successfully executed without issue. He also carries a performance objective to avoid any business downtime caused by changes that he has managed. Despite his best efforts, Charlie has failed to meet both of these objectives since joining the organization last year. This has impacted his performance review and his bonus compensation causing him to start seeking employment opportunities elsewhere.

Peter is more insulated from the day-to-day firefighting in this IT organization, but his role is no less critical. Many of the problems he is working on have persisted for months and, despite his best efforts, he has not been able to identify root-causes nor implement permanent resolutions. One of his major problems involves a recurring weekly outage. The outage typically lasts for an hour or more while other IT resources execute a complex workaround procedure to stop a running application and its supporting database then reboot the server and bring everything back online in the right sequence. In addition to lost productivity for the impacted users, the recurring nature of the outage is hurting the credibility of the IT department with the business unit that uses this application, and the CIO is now personally getting updated on Peter's progress weekly.



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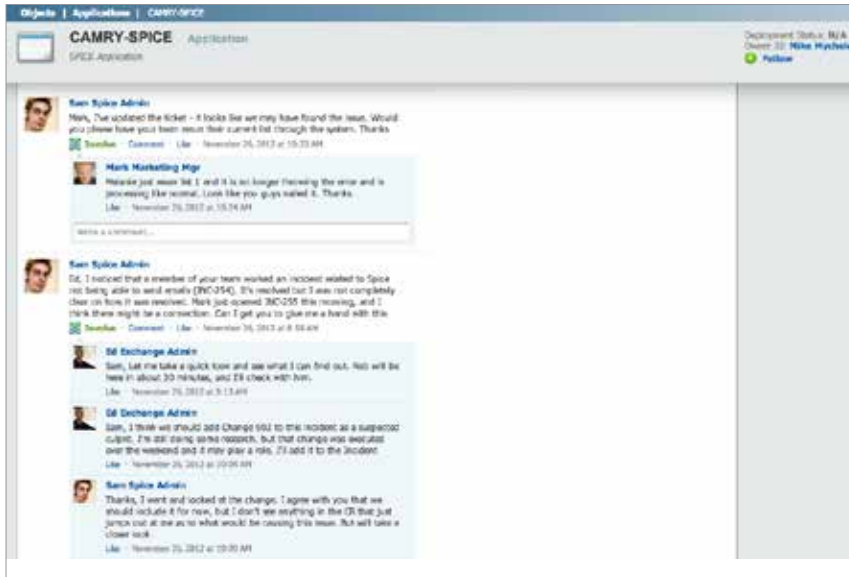


Figure 2:
An Activity Stream for a Social Knowledge Object

With powerful visualization capabilities, ITinvolve enables the team to create role-based and personalized views (Perspectives) of the knowledge objects in the environment. These knowledge objects can be physical entities such as servers, network devices, or applications, but they can also be logical entities such as relationships, best practices, lessons learned, common fixes, incidents, changes, problems, and more. Using this “social object” approach from ITinvolve, IT teams finally have a solution that is easy-to-use and provides them with real value that matches the effort they put into using and maintaining it.

1. How ITinvolve Helps Traditional ITSM and Service Desk Solutions Improve the Management and Resolution of Incidents

With ITinvolve deployed along with her organization’s existing service desk tool, Terry can make significant improvement in assigning complex incidents to the right teams and individuals. Using the Scenarios capability in the ITinvolve solution, Terry is able to quickly analyze the impact of object(s) – e.g. servers, network devices, applications, databases – she has associated with the incident. She can review existing knowledge about those objects, such as best practice documents, policies, and key settings, and also identify the individuals or teams responsible for the objects. In this way, Terry can make a much more informed decision when assigning the incident to the right individual or queue. By associating the incident scenario object to the other objects, the individuals who are following those objects are also notified and pulled into a collaborative triage process that allows them to contribute their expertise in identifying the root-cause of the incident and any available workarounds. This ensures the organization is bringing all expertise to bear to assist the specific individual who has been assigned to work the incident by Terry.



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By using the ITinvolve solution to complement their existing Service Desk, Terry's organization gets the right individual or team working on the issue right away and alerts others who may have expertise to assist. Thus, they are able to reduce the amount of time it takes to identify the root-cause and implement appropriate fixes or workarounds to significantly reduce the mean-time-to-restore-service (MTTR).

This incident management scenario can be managed by ITinvolve in two ways. The simplest option is to deploy ITinvolve as a standalone solution. After Terry creates the incident in her third-party Service Desk, she simply opens the ITinvolve solution, creates a new scenario object with basic details about the incident and then associates one or more impacted objects to the incidents. Once resolved, she (or the final ticket owner) documents the resolution as a new knowledge object involved in the scenario, and then returns to the third-party Service Desk solution to close the ticket.

The second option is to integrate the third-party Service Desk and the ITinvolve solution. Once integrated, the scenario object will be automatically created containing the details Terry has provided from the third-party Service Desk record. When the incident is resolved, the information added to the scenario object in the ITinvolve solution is then passed back to the incident record in the third party Service Desk and Terry closes out the ticket. Additionally, if the third-party service desk and ITinvolve solution are using the same naming convention for objects, then the object at fault can also be inserted into the incident record prior to closure.

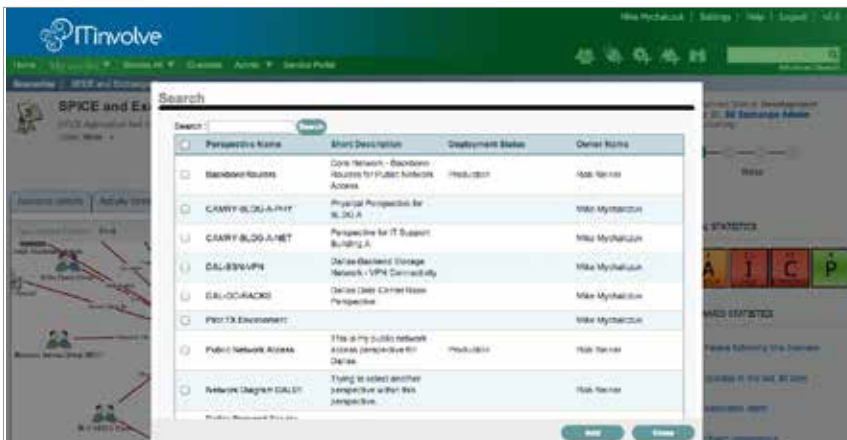


Figure 3: Impact analysis of objects associated with the Incident Scenario Object helps identify appropriate Perspectives and who should be assigned to work the incident

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Figure 4:
An Example Perspective (in this case for an Application Administrator's point of view)

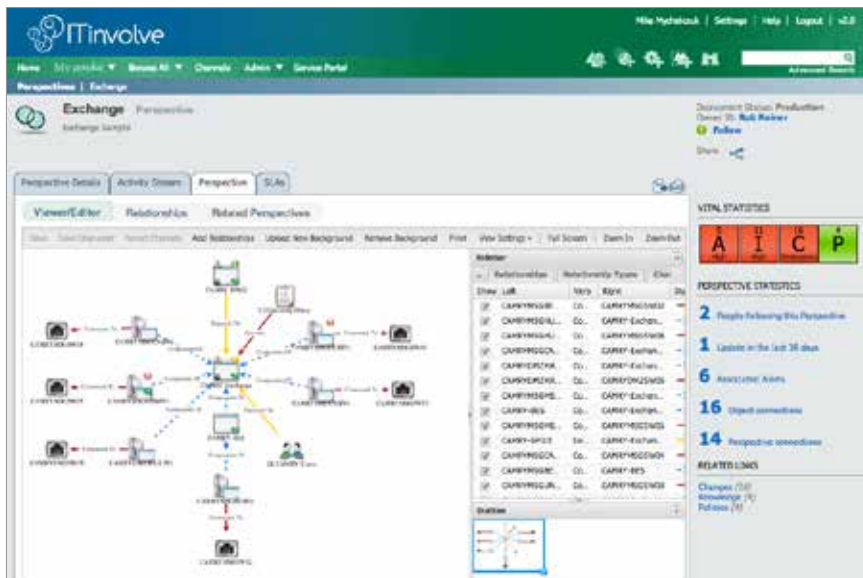


Figure 5:
An Example Perspective (in this case for an Exchange Administrator's point of view)



Constituency	ITinvolve	Benefits
Service Desk Technician	Identify relevant Perspectives and related subject matter experts who are best suited to triage the incident	Quickly identify the best individual(s) to work the incident; reducing not only the number of re-assigned tickets, but also the time required to triage incidents
Level 2 & Level 3 Personnel	Automatically update object owners and followers when things change in the IT environment	Accelerate time to incident resolution and restoration of service by keeping IT experts up-to-date on changes in the environment
	Proactively engage subject matter experts in triaging incidents for items they are responsible for or are experts about	Accelerate time to incident resolution and restoration of service by getting the right individuals assigned quickly to work the issue Avoid lost productivity through incorrect assignment of tickets to the wrong teams and individuals
Service Support Managers	Monitor incidents and have immediate visibility into current collaborations to resolve active incidents	Increase transparency into the real working state of active incidents Avoid re-learning and accelerate time to incident resolution through proper assignment of incidents and re-use of knowledge learned in prior incidents
	Capture knowledge of incident resolution for re-use	

2. How ITinvolve Helps Traditional ITSM Solutions Better Plan and Execute Changes

A change manager named Charlie is struggling to achieve a 100% change success rate and ensure there is no business downtime caused by changes he has managed,

Prior to ITinvolve, Charlie was under tremendous pressure to quickly assess the risk of changes and get them in front of the Change Advisory Board (CAB). However, lacking a full understanding of his organization's complex IT environment and who he could rely on as subject matter experts to assist him, Charlie has missed several key dependencies when planning recent changes and also failed to correctly note several key settings that needed to be verified after change execution.

As a result, there have been two very high profile outages in the last two months as well as several smaller outages that occurred during off-work hours that required others on the IT team to respond from home, and even come into the office. Charlie has requested more time to plan changes, but was told that IT is already holding back the business when making changes within current SLAs and that asking for additional time is simply not possible.



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With ITinvolve deployed, Charlie is now able to meet the challenge of managing risks much more effectively. That's because he can more easily and quickly identify the right IT and business stakeholders who need to weigh-in and provide their risk assessment when he is planning changes. For example, when evaluating a proposed change, the ITinvolve solution automatically identifies the key stakeholders for Charlie and initiates a collaboration process with them so that they can weigh in on the proposed change with their own individual risk assessments.

Just as important, ITinvolve gives Charlie full visibility into the IT environment including dependencies, relevant policies, relevant key settings, and best practices from prior changes for the key objects involved every new change. With the ITinvolve solution, Charlie gains a much more accurate understanding of risks, including the opinions of IT experts, so that when he finalizes his recommendations to the CAB, he can do so much faster and with a higher degree of confidence.

Improving change management with ITinvolve can be implemented in two ways. The simplest option is to deploy ITinvolve as a standalone solution. Charlie first creates the change record in a third-party Change Management application and then replicates this information as a new scenario object in ITinvolve.

After this step is complete, he associates the scenario object with one or more additional objects in ITinvolve. This enables him to investigate the relevant Impact Factors for these objects – e.g. key settings that he needs to be aware of – and also leverage the ITinvolve Impact Engine to visually understand upstream and downstream impacts. The ITinvolve solution then automatically assigns and notifies the object stakeholders to initiate the change risk assessment weigh-in step. Once all relevant stakeholders have provided their risk assessments, Charlie reviews them and further engages in an online collaborative dialog as needed to arrive at a final risk assessment from all subject matter experts.

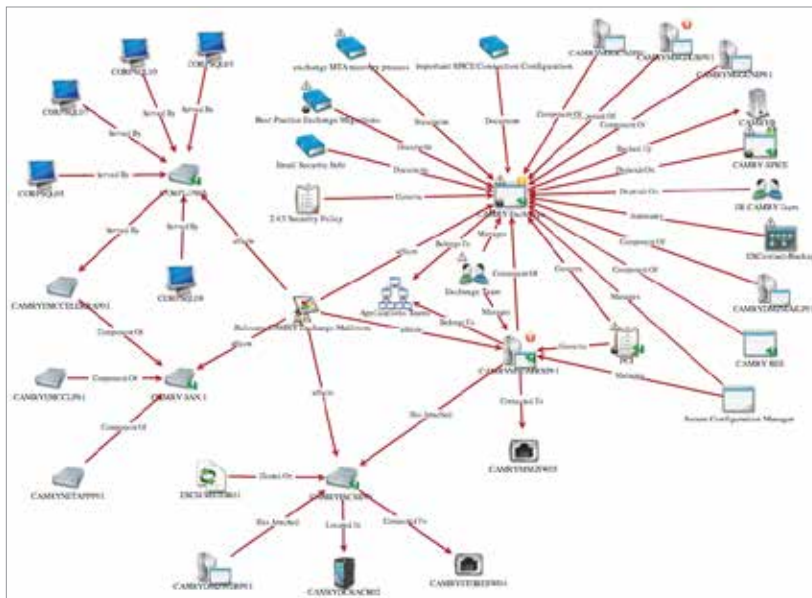


Figure 6:
Visually powerful Scenario Impact Analysis in ITinvolve

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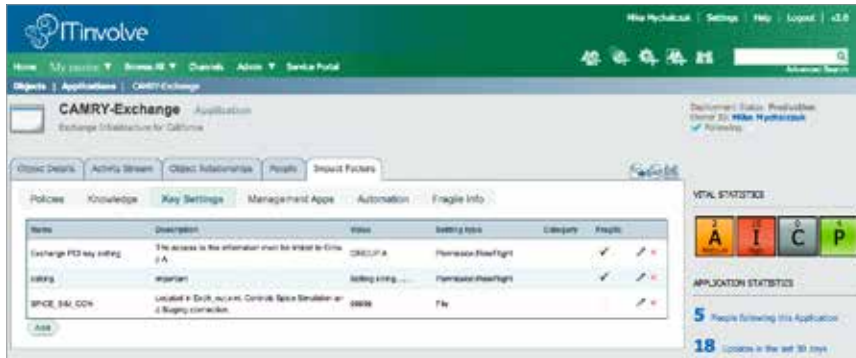


Figure 7: Documentation and quick access to Impact Factors in ITinvolve

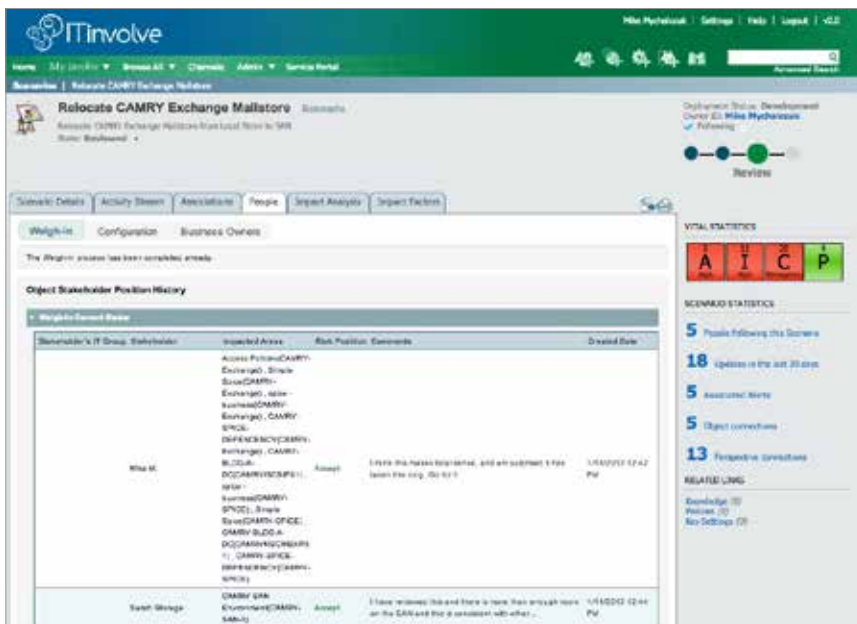


Figure 8: Weigh-In for Change Risk with ITinvolve



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Charlie then documents the consensus opinion from the weigh-in step and links the scenario object as a URL in the third party Change Management system so that CAB members can easily view more detailed information. Finally, he waits until the CAB has made its decisions, and then updates the scenario status in the ITinvolve solution.

The second option is to integrate the third-party Change Management application and the ITinvolve solution. Once integrated, the Change scenario object will be automatically created containing the details Charlie has provided in the third-party Change record. Charlie then completes the same steps as the standalone option mentioned above, including investigating Impact Factors, viewing upstream and downstream impacts, and the ITinvolve solution automatically assigns and notifies all stakeholders. Stakeholders then complete their weigh-in and Charlie notes the consensus in the scenario object. The weigh-in consensus information is then automatically passed to the Change Record in the third-party system. When the CAB completes their review, the status of the decision is passed back to ITinvolve and all stakeholders are notified of the decision.

Summary of ITinvolve benefits for Change Management

Constituency	ITinvolve	Benefits
Change Manager	<p>Identify objects (e.g. services, applications, servers, databases, etc.) that will be affected by the change along with relevant impact factors, key settings, and upstream/downstream impacts</p> <p>Identify Perspectives and related subject matter experts who are best suited to weigh-in with a risk assessment</p>	<p>Quickly and accurately identify which elements of the IT environment will be impacted by a change</p> <p>Ensure change execution plans are complete with key settings that need to be validated or addressed after the change</p> <p>Ensure relevant IT and business stakeholders can provide their expert assessments of the change risk and make recommendations on how to mitigate it</p> <p>Improve change success rate by ensuring all relevant input on change execution plans are incorporated</p>
IT and Business Stakeholders	<p>Provide the ability to weigh-in on changes that relate to objects stakeholders are responsible for or interested in</p>	<p>Every change includes the input of appropriate experts to identify and mitigate risks</p> <p>Reduce or eliminate business downtime from changes; or when downtime is required, ensure all relevant parties are aware</p>
Change Advisory Board (CAB) Members	<p>Provide the ability to review risk assessment from relevant IT and business stakeholders</p>	<p>Improve the confidence of CAB members when approving changes</p> <p>Focus CAB meetings on high risk changes and those with exceptions</p>



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3. How ITinvolve Helps Traditional ITSM Solutions Reduce the Problem Backlog

A problem manager named Peter is struggling to reduce his overall problem backlog, including a specific problem that is causing regular outages and harming the reputation of IT with business users.

Prior to ITinvolve, Peter has been using a patchwork of information to investigate the root-causes to recurring problems. These include the company's CMDB, Visio diagrams provided by several IT architects, a SharePoint site where workarounds are catalogued, as well as several asset spreadsheets that contain information not available in the CMDB. Lacking a single source that provides an up-to-date view of his organization's complex IT environment, Peter has had to schedule several meetings with engineers and architects to get a better understanding of the current IT landscape in order to properly address his top problem. In these meetings, Peter has been gaining bits and pieces of information that have helped to identify several potential root-causes, but the application and its environment are highly complex and his organization has not been able to justify investing in a fully configured clone of the environment to test his assumptions. Therefore, he had to wait for the next outage to occur so that he could monitor all the relevant system logs and test his assumptions. This exercise helped him rule out some of the possible root-causes but was not conclusive, forcing him to wait for the next outage to see if he could observe different characteristics to test his remaining assumptions.

With ITinvolve deployed, Peter can immediately see a far more complete and up-to-date picture of the affected application environment including supporting objects and relationships. He can also bring key engineers and architects into a collaborative process where they can share their expertise with each other and quickly crowd-source their knowledge to reduce the number of likely root-causes.

The ITinvolve solution also allows Peter to model changes in the relevant objects to mimic characteristics from past outages, and identify what he believes is the most probable cause -- a weekly batch job that appears to hang. Peter adds the batch job to the problem scenario object and engages the job scheduling team in an additional collaboration process, including pointing out to the team that this job is likely causing significant business impact. The job scheduling team prioritizes investigation of the job and realizes that a key setting has not been included, causing the job to enter a perpetual wait state. The job scheduling team then resolves the error by applying the key setting.

Peter notifies his manager that he believes the problem has now been fully resolved. His manager updates the CIO with this status and, after two weeks without a further outage, the problem record is closed.



Figure 9:
A Scenario Object for a Problem with relationships to other relevant objects

Identifying and resolving problems with ITinvolve can be implemented in two ways. The simplest option is to deploy ITinvolve as a standalone solution. After Peter creates the problem record in his third-party Service Desk, he simply opens the ITinvolve solution, creates a new scenario object with basic details about the problem and related incidents and then associates one or more impacted objects to initiate the collaborative problem management process. Once the problem is resolved, he documents the permanent fix as a new knowledge object associated with the scenario object, and then returns to the third-party Service Desk solution to close the problem record

The second option is to integrate the third-party Service Desk with the ITinvolve solution. In this approach, the scenario object will be automatically created containing the details Peter has provided in the third-party Service Desk problem record. When the problem is resolved, the information added to the scenario object in the ITinvolve solution is then passed back to the problem record in the third party Service Desk and Peter closes out the problem record.

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Summary of ITinvolve benefits for Problem Solving

Constituency	ITinvolve	Benefits
Problem Manager	Ability to have comprehensive visibility into the IT environment and dependencies	Speeds the ability to identify potential root-causes and reduce them to the most likely cause or causes
	Ability to identify relevant IT experts to collaborate on the problem	Ensures relevant experts can leverage one other's Perspectives rather than Peter having to be the sole unifying thread
	Ability to model scenarios to test possible root-causes and their impact	Reduces the need for re-learning should similar problems occur in the future
	Ability to document the permanent fix in the context of the problem and its related objects	
IT Experts	Ability to leverage the input of other experts	Faster identification of root-causes Ability to avoid lost productivity due to numerous meetings
Business Users		Increased satisfaction with IT Reduced business downtime

Extending the complementary solution further with Scenario Channels

Channels within the ITinvolve solution further facilitate collaboration within teams and across teams. IT organizations can set up Channels or queues for various scenario types (incidents, changes, problems) but also other scenarios such as disaster recovery planning.

They enable IT managers, support technicians, and more senior staff to monitor the status of scenarios at the type level and quickly engage in collaboration streams around a given scenario they have something to contribute to.

Additionally, they provide the ability to assign actions, create agenda items for team meetings around assigned work, and enable a unified virtual workspace so that items don't get lost in email inboxes or team members fall "out of the loop" due to private hallway conversation or 1:1 instant messages.

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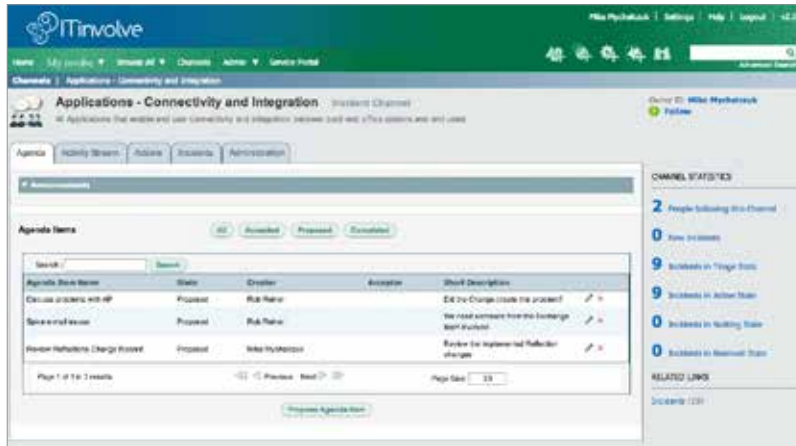


Figure 10:
A Virtual Channel for Incident Scenarios

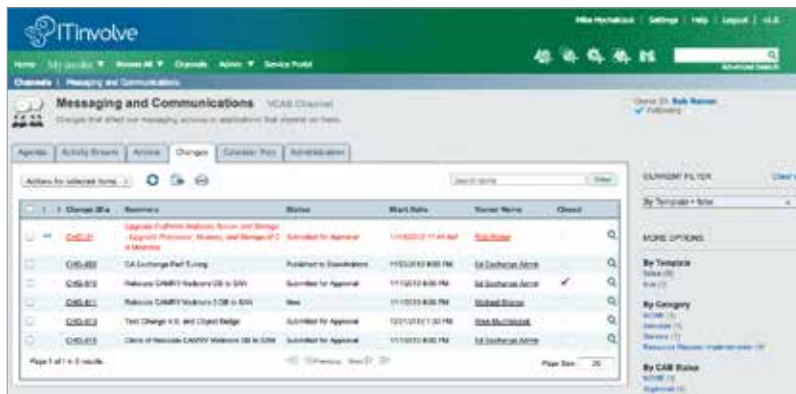


Figure 11:
A Virtual Channel for Change Scenarios



You can learn more about how ITinvolve works to resolve incidents, manage changes and solve problems by signing up for a free trial at www.itinvolve.com or email us at sales@itinvolve.com to set up an online demonstration at your convenience.

USE CASE SCENARIO

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