evergreen
IT that aims higher

Background and Challenge

A Premier Transportation Company launched initiatives to improve its IT infrastructure and processes. It had found it was unable to accurately measure its Key Performance Indicators (KPIs) based on the metrics provided by its IT Service Management (ITSM) solution. From an operational perspective, incidents were being assigned and then re-assigned to incorrect support teams and often lost in a black hole. From a customer service perspective, users did not have a web portal where they could request help and get accurate completion estimates for reported common issues. *From the business perspective, this made IT's service delivery appear to be inconsistent, inflexible and not well managed.*

Senior management wanted to make it clear to both employees and IT staff that they recognized the problems with IT and were serious about addressing them. Their plans included the adoption of an IT Service Management tool (HP Service Manager) with the focus on automating processes aligning with ITIL v3 best practices, and improving the clarity and visibility of their Key Performance Indicators and Operational metrics.

Along with these high-level goals came two constraints: Due to resources and other projects this effort had to be completed in ten weeks and delivered on a fixed-price basis.

Evergreen's Approach

The Client was introduced to Evergreen by HP as a trusted partner capable of delivering the business solution needed, built upon HP Service Manager 9.2. Evergreen began a discovery process, interviewing the key stakeholders to clarify the business goals and determining the functionality and integration points needed to support them, within the time and budget available. Functionality needed included Employee Self-Service (ESS), Service Desk, Incident Management, Service Level Management and Configuration Management.

The project began with reviewing the scope, roles, project plans and iterative milestones. Design workshops were held to review Service Desk, Incident (plus SLAs/SLOs) and Configuration Management processes. These included recommendations on industry best practices as well as product technical demonstrations for needed functionality. The result of the workshops was a "best practices" process-aligned functional design and technical specification, which documented the proposed Client's solution. Once reviewed and accepted, Evergreen used the design to build and implement the solution.

Throughout the project, in addition to the normal weekly status reporting, Evergreen facilitated iterative checkpoints with key stakeholders and executives to demonstrate the evolving solution and how it would support and streamline current processes. Additional requirements were uncovered and discussed, including an executive dashboard, dynamic notifications to specific response groups and service-level targets provided to end users for common issues. These requirements were well aligned with the business objectives, so they were added to the solution – without impact to the project timeline.

Within 10 weeks, Evergreen designed, built and delivered an ITSM solution meeting the Client's requirements, which automated processes, eliminated key pain points, established proactive control over service quality and closed the functionality gaps that existed in the previous solution.

Highlights included:

- Tailored Self-Service (ESS) portal to allow customers to report on common issues and view the expected time to completion; also provided customers the ability to see response and resolution time(s) for escalated incidents

- Collaboratively configured graphical charts and dashboards to conceptualize and communicate key performance indicators and operational metrics, aligned with industry best practices

- Created Service Level Objectives, aligned with the Client's target times, to track and alert on potential and/or breached resolution and response targets for high-priority incidents

- Controlled and managed the migration of system code between Deployment and Production systems

- Created an organization-wide test plan and documentation (including test scenarios and testing checklists) and facilitated User Acceptance Testing

- Created an organization-wide training plan and documentation (including training presentation and user guides) and conducted training sessions

- Provided Solution Documentation (including a system administration guide)

- Provided onsite support, oversight for production rollout and post-production support to ensure successful business adoption

Outcome and Benefits

The IT Service Manager project delivered the designed solution on schedule and under budget. The solution has the Client's operational ability at a new level, providing improved customer access, the ability to deliver service more rapidly through automated processes and better management and proactivity through the ability to set and accurately measure KPIs in support of the business improvement goals. Additional benefits include the following:

- *By completing the project under budget* (from both an estimated expense and service perspective), the Client was able to shift remaining funds to support other initiatives.

- *The solution not only supports the newly improved IT processes, but is also flexible and scalable* to sustain the Client's evolving process improvement plans for the year ahead:

  ◦ Knowledge Management – today support documentation is not organized, maintained or available throughout the organization. The Client would like an integrated solution where knowledge capital is categorized, reviewed and readily available to both internal support teams and customers.
  ◦ Problem Management – today all Root Cause Analysis activities are managed individually by each support team, which yields a high volume of repetitive incidents and no coordinated focus on finding permanent solutions. The Client would like to create a common, formalized Problem Management process integrated with Incident Management, to eliminate the time and resources wasted on common, repetitive activities.

- *Established the foundation for transforming from a silo-based IT organization into a service-oriented IT organization* by guiding the creation of a Service Hierarchy. IT had been focused on supporting

applications, rather than providing services to customers. The creation and application of a service hierarchy for supporting applications has provided teams with the end-to-end visibility into the customers and services they support.

- *Provided a process improvement plan for converting the Help Desk into a "Single Point of Contact" Service Desk.* The organization was lacking a "face of IT," and many customers did not know who to contact with an issue or simply lacked confidence in the Help Desk. The plan provides for a training and incentive plan designed to build the skill set of the Service Desk Analysts that will lead to improved customer service.

- *The new employee self-service (ESS) portal provides a one-stop shop where customers can review news and updates from IT as well as request help.* Customers can also report common issues and will instantly be provided estimated solution times.

- *The new dashboards, based on Key Performance Indicators, provide management an instant view of the health of their IT services processes.* These dashboards now drive weekly operational meetings on service quality.

- *Previously, Service Level Objectives (SLOs) were simply target numbers posted on the outside of cubicles. Now, SLOs are set, tracked and managed.* A heightened degree of accountability and sense of urgency now pervade Service Management. For example, notifications and alerts are now sent to support team members as reminders to acknowledge and close their incident reports. As a result support incidents are no longer getting lost in a "black hole."