



SIX PITFALLS TO AVOID ON YOUR WAY TO AGILE SERVICE MANAGEMENT

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The Current State of Agile Service Management

Agile Service Management has been on the agenda of most IT leaders for some years now, and even more so since the publishing of ITIL 4. In many blog posts, industry experts have made comparisons between agile development and agile Service Management. The agile manifesto has been translated to fit the concept of services. However, little has been written about using agile methods in real IT operations and on real tool configurations based on ITIL 3. This guide will help you avoid the most common pitfalls when applying agile in practice on your service operations.

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1. Directly applying Scrum in your Service Request Management

There are two major approaches to agile service management: Kanban and Scrum. A few years back, Scrum used to be very dominant in agile development. Scrum assumes that a team splits work into two- to three-week sprints. The benefit of the sprint concept is the implicit commitment of the agile team to deliver the work as planned because the sprint content is mutually agreed.

However, when changes in priorities occur, like unforeseen support and maintenance duties, the rigid two-week format becomes challenging.

Therefore, we do not recommend trying to apply scrum and sprints to service request management or even incident management. The nature of IT services, even with all the predictive maintenance of the world, will remain unpredictable, to some extent. Delivery times, except for well-rehearsed service catalog items, will flex more than a two weeks' time window allows.

Instead of Scrum, Efecte recommends using the more continuous Kanban method. Kanban allows the needed flexibility while leveraging benefits of the scrum method such as backlog refinement and retrospective meetings.

	SCRUM	KANBAN
IDEAL CASE	Scrum is best suited for cross-functional teams working in a setting where the tasks can be broken into a 2–4-week cycle.	Kanban is best suited when tasks are unpredictable, and the “work” should be deployed as soon as possible.
PRINCIPLES	<p>Transparency: Environments must be open, and all team member should be aware of the issue's others are having. Reoccurring or lasting problems should be continuously brought up.</p> <p>Inspection: Teams should continuously reflect on how processes are working with daily meetings, sprint reviews, and retros (discussed below in practices).</p> <p>Adaptation: The team should continually review how things are progressing and discuss items that are an issue or confusing.</p>	<p>Start with what you do now, agree to improve based on incremental changes, and encourage leadership.</p> <p>Understand and focus on customers' needs.</p> <p>Manage work, but let people self-organize.</p> <p>Evolve policies to improve outcomes.</p>

[Download our Agile eBook to learn more about Scrum & Kanban!](#)

2. Trying to Drag and Drop your incidents on a Kanban Board

If your ITSM tool includes the functionality that allows managing incidents on a Kanban board, you probably would like to drag-and-drop incidents into the resolved status. Nevertheless, before changing the status of an incident to the next, you will need to fill in one or many fields. If you move from “New/Untouched” to “Solving” you will have to fill in a lot of information regarding the classification and the support person. If you move from “Solving” to “Resolved” you will need to fill in the information on the resolution provided. Thus, simple drag-and-drop will not work.

Your ITSM solution might have the means to fill in the mandatory fields from within the Kanban tool, but typically these hard-coded implementations will be

very hard to customize for your processes. Managing the status of incidents is easier to do from a dedicated view. Also, automated status changes can easily be created based on the completeness of a form, but not the other way around.

In practice, a Kanban board is a great tool for visualizing the status of incidents and ranking the work which should be done next, but the drag-and-drop action should be applied to simpler projects and release management practices. If you have a dedicated form to manage service desk interactions, this problem will not be any different. Even for managing changes, you might face the same challenge.

The screenshot displays the 'efecte' Service Desk Interactions interface. The top navigation bar includes the 'efecte' logo, a search bar, and a 'Save' button. The main area is a Kanban board with seven columns representing different incident statuses:

- 1 - Untouched (6 Max 5):** Contains three incident cards. The first card (INC-1154) is titled 'Zugangsberechtigung für SharePoint' and is a 'Self-Service' incident. The second card (INC-2099) is titled 'Drucker hat kein Papier mehr' and is an 'E-mail' incident. The third card (INC-2101) is titled 'Grosse Dateien werden nicht geladen' and is an 'E-mail' incident.
- 2 - Solving (117 Max 15):** Contains three incident cards. The first card (INC-2093) is titled 'VPN Verbindung hängt' and is a 'Phone call' incident assigned to 'Smaga Michal'. The second card (INC-693) is titled 'F-Secure Virusssoftware läuft nach MacOS Update nicht mehr' and is a 'Self-Service' incident assigned to 'Christerson Jans'. The third card (INC-1260) is titled 'Drucker in Gebäude 270 E hat kein Toner mehr' and is an 'E-mail' incident assigned to 'Durkin Aleks'.
- 3 - Pending - waiting for customer (2):** Contains two incident cards. The first card (INC-1195) is titled 'Facility Cloud Service antwortet nicht' and is a 'Phone call' incident assigned to 'Aboly Mary'. The second card (INC-1739) is titled 'Lenovo Display defekt (Kaffee)' and is a 'Phone call' incident assigned to 'Dalberg Erika'.
- 4 - Pending - waiting for 3rd party (3):** Contains three incident cards. The first card (INC-1150) is titled 'Microsoft 365 upgrade hängt' and is a 'Phone call' incident assigned to 'Gwiazdowski Eryk'. The second card (INC-1168) is titled 'Laptop crashed' and is a 'Phone call' incident assigned to 'Gulczynski Radovac'. The third card (INC-1173) is titled 'Ubuntu on Windows 10 has weak performance' and is a 'Chat' incident assigned to 'Aquino Carlos'.
- 6 - Resolved (7):** Contains three incident cards. The first card (INC-1191) is titled 'Druckerserver reagiert nicht im Gebäude 420' and is an 'E-mail' incident assigned to 'Dalberg Erika'. The second card (INC-2105) is titled 'Passwort zum Intranet bitte zurücksetzen' and is a 'Phone call' incident assigned to 'Christerson Jans'. The third card (INC-2103) is titled 'My mail does not open anymore' and is a 'Chat' incident assigned to 'Administrator Demo'.
- 7 - Closed (0):** This column is currently empty.

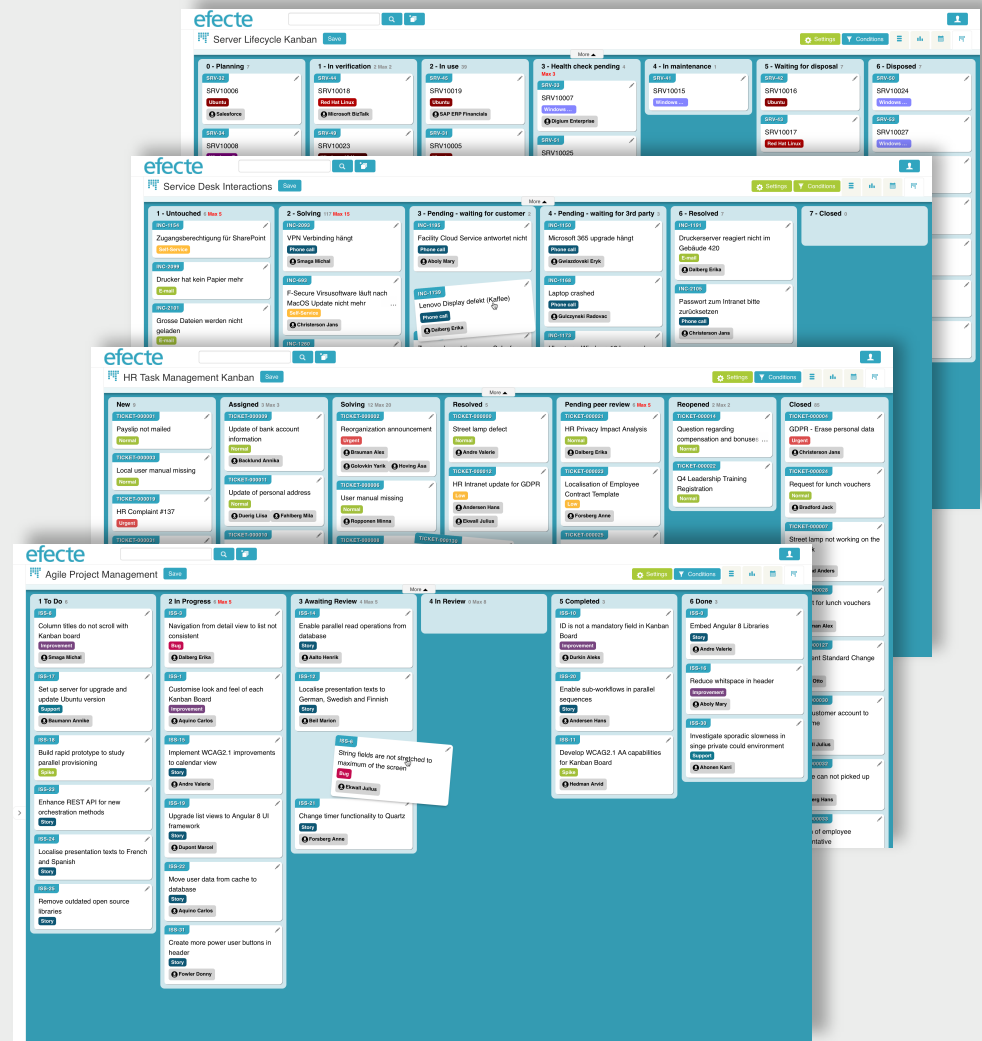
Each incident card also includes a small 'More' button in the top right corner. The interface is clean and modern, with a blue and white color scheme.

3. Starting Agile Service Management with Incident Management

Incident Management is not the only, or even the first, process where you should use Kanban. You might be more successful starting its use with simpler things, such as managing the backlog of improvement ideas that are handled in retrospective meetings. (In case you are not familiar with retrospectives, please check out our [eBook on the principles of agile](#)). Project Management in IT is also an easy way to introduce a Kanban-style of working.

Incident management, is a challenging process to start learning agile and the Kanban-style of task management with. The priority order of things is expressed by how high a task is in a column on the Kanban board. If you follow this ranking principle for service desk tasks, you might quickly notice that SLA- or priority-based ranking of issues will conflict with the order of tasks in your backlog. The multi-dimensional nature of organizing service desk issues (not to mention VIP tickets) makes the correct ranking of these tasks from top to bottom a challenging job.

If, even with these considerations, you decide to start your agile transformation with Incident Management, then we recommend not to stop there, as there are practices much more natural to the Kanban-way of working. Things like Release, Deployment and Change practices will enable many of the benefits of agile much quicker. If you have software development and testing practices in your IT, which already work in base on some agile practices, they can be easily transfer to the Kanban board of your ITSM tool. Nevertheless, before starting, make sure that your ITSM tool can cover all these practices with dedicated Kanban boards.

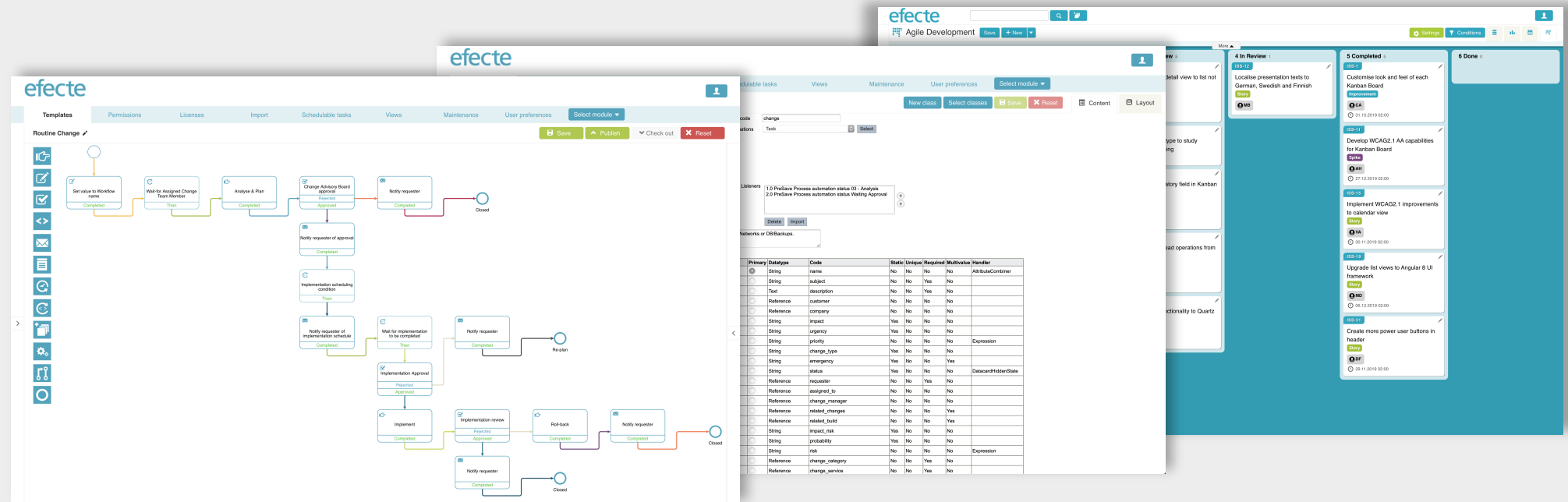


4. Attempting to make a PinkVerify-certified configuration agile

Is your Change Control (formerly known as Change Management) configuration in line with the requirements identified in PinkVerify? If so, then you might have a lot of fields that could slow you down on the path to becoming an agile organization. There may be a multitude of fields related to scheduling implementation, testing, and releasing. You might have two fields for each phase: one for the planned timing and one for when a phase actually happened. All this is good for precise timing and analytics, but is this useful for an agile approach? When using a Kanban methodology for the implementation of changes, they get done and tested whenever resources become available and whenever the backlog says so. Trying to nail down the implementation of a change to a particular day might prove to be a fruitless effort. A more meaningful approach can be assigning a change to a particular release or a program increment if you follow the Scaled Agile Framework approach.

Another opportunity to “remove waste” in the Change Control practice of an agile organization is the classification of changes. Traditionally you calculate the priority from two factors: the impact and the urgency. How about empowering your agile team to come up with the priority directly, without a matrix? You should re-evaluate every click, every analysis, and every field when introducing agility to any process but especially Change Control.

Lastly, think about whether you can afford to remove some approval steps in your Change Control process. Approvals disrupt progress. They annoy both the persons waiting for the approval and the persons expected to review a given change. It makes good business sense to require one approval for investing significant resources for a medium or major change. But do you need more approvals than one, or can you trust the team? Going agile means more lean management and also moving responsibility to the team.



5. Introducing SAFe methodology before all teams are agile



Maybe you feel that introducing a Kanban board in one of your teams is not good enough? Do you want to have many agile teams? Are you thinking about going all-in and introducing the Scaled Agile Framework (SAFe) for the entire IT organization, on top of agile ways of working at the team level?

There are two sanity checks to make before you go down that road:

1. Make sure that all teams, really, work according to the principles of SAFe. This working style should include all the great things such as backlog refinement meetings, retrospectives, and peer reviews. Trying to fit teams together under a SAFe umbrella will be very burdensome if some teams still adhere to their traditional waterfall principles and consider these more important than the program increments of SAFe.

2. Confirm that the agile way of working is deeply rooted in the behaviors and mindsets of the individual teams. SAFe, with its program increments, might be a reasonable excuse for a team to fall back to a “short-period waterfall” approach instead of a true Kanban. It’s better to “live and breathe” Kanban for some time before introducing program increments and agile release trains.

If you want to learn more about SAFe and Agile Service Management, please listen to our [webinar recording](#) on the topic.

STEP 1

Implement Agile processes and practices into the individual teams that you want to include into SAFe.

STEP 2

Review the teams usage of agile processes and practices to make sure they are truly agile and efficient.

STEP 3

Begin introducing SAFe concepts only to the teams who have completed the first steps and are really ready.

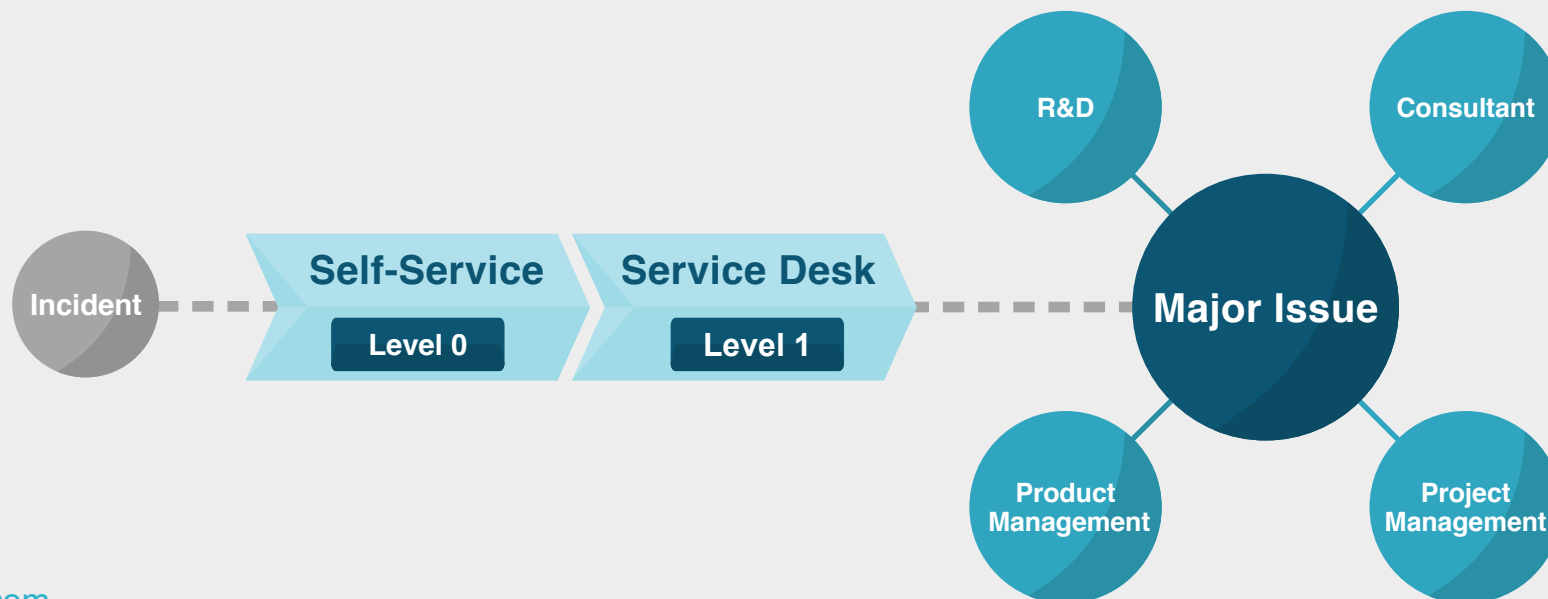
6. Approaching complex issues with a traditional 3-tier approach

The traditional way of solving issues is through a 3-tier approach. Level 1 (after Level 0 which should be self-service) is often the service desk – either the global front line to all issues, a service provider or a regional instance of the service desk. Level 2 can be a small team of problem managers, a global service desk or something in between. Level 3 is often the final stop of vertical escalation, often close to the company's product development. Some complex issues might require the knowledge of tier 3 for diagnosis. In the traditional approach, a complex, unknown issue is escalated one tier at the time towards its final destination.

There is nothing wrong with that approach because each tier should filter out the issues that they can solve on that level. However, this also means that the reporter of the issue needs to wait while the issue gets escalated through the tiers with a new pair of eyes trying to diagnose and solve it. That takes time and lowers customer satisfaction. To avoid these negative impacts, there is a

method called swarming. Swarming is an agile way of working together in a team. When applied to issues, it means that after a quick initial diagnosis the complex, major issue is assigned to a team consisting of for-purpose selected experts. They come together as a “swarm” around the topic. This team can consist of any experts from any tier and any part of the organization. Such teaming ensures the right amount of people with relevant competence can solve the issue quickly.

The concept of swarming is a great way to break up silos and tiers in the organization. But swarming also needs to be used with care. It is, by nature, more resource-intensive than the traditional tiered model, and it more easily utilizes the scarcer deep expert knowledge in level 3. Hence, it should be only used for complex and major issues and not for trivial cases. Nevertheless, even with these shortcomings, the approach of swarming can do magic to customer experience.



If you are interested to find out more about tools and consulting around agile service management, then do not hesitate to contact us at info@efecte.com. We'll be in touch.



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