

Roundtable 55 Transcript

The IT Peer Community. No Vendors. Ever.



IT SERVICE MANAGEMENT

At this 12.08.22 Roundtable 55, NOREX Members discussed adopting a formal ITSM practice; ITIL v3 and v4; other frameworks used; what works well vs what does not; tools utilized; integrating Microsoft Teams with Service Management Software tools; self-service knowledge management tools; implementing a knowledge management framework; and using the ITSM system for Enterprise Service Management (ESM).

EXECUTIVE SUMMARY

There was discussion on where to start with ITSM, and a Manager of Disaster Recovery / Business Continuity stated that incident management is a good place to begin especially if your service desk or help desk is taking frontline calls. He suggested tying problem management to it, and if you really want to grow, get event management into it which would start to mature your overall event, incident, and problem management within the ITSM. Another Member said to look at change because change and incident go hand-in-hand. He specified this is change to infrastructure that could affect the enterprise. You will find incidents propagated because there is poor change management involved; testing and double-checks are not done. To begin, his organization put more focus on change management because if you get your changes right your incidents go away on their own. A Service Desk Supervisor stated it starts with a good incident process. They are trying to have everything come in as an incident, resolved in the change management, and then followed up with a root cause analysis in the problem management. Finally, a Member shared that change is really where it starts because 80% of IT problems are caused by changes or human error. Change by itself does not stop incidents from occurring; problem management is where that steps in and root cause analysis determines what the root cause is. You definitely need incident to start tracking issues, but change control is a close second. Problem is right behind it. Event management is more of a maturity thing.

On the topic of what has worked well and what has not worked well, a Member whose organization is doubling in size questioned what is essential to know prior to growing your IT Service Management. A Service Delivery Manager shared that tool selection is important. If you are a small organization, big tools like ServiceNow and Ivanti are ITIL, completely unnecessary, and will crush you. He suggested looking at the things you are doing, the processes you are taking over, then do them well and grow from there. Accept the fact that you will probably end up with tool replacements every few years as you mature. Looking at customer service tools up front is great because they are flexible and tend to be cheaper. Zendesk is a great example. It is not an ITIL tool so it will not prop up your framework, but it can be a good steppingstone into a more IT focused platform that is going to require less weight on the administration side. A Member with an organization with an IT team of six started with using Salesforce's watered-down ticketing solution. This proved an absolute disaster. They dumped Salesforce and went straight into Zendesk. They are using it just for ticketing and basic change management with solid results. Finally, a Member offered that if you are small and just starting, be deliberate and tenacious about having an accurate CMDB. You need to know where all the assets are and what all the assets interact with. As you move forward this is important, especially when you are trying resolve an incident. When deciding whether a change is going to impact anything else, you rely heavily on that CMDB.

Additional headline topics:

- ITIL v3 or v4? If not ITIL, what framework?
- Utilizing CMMI to gauge maturity levels.

TABLE OF CONTENTS

Adopting a formal ITSM practice.....	3
POLL: ITSM Maturity Level.....	3
Where to start with ITSM.....	4
ITIL.....	7
CMMI	8
Lessons learned for early in the process	9
POLL: ITSM Tools	12
Tool Customization	14
Integrating Teams, SharePoint, and Knowledge Management into ITSM Tool.....	16
Knowledge Management Tools.....	17
Products / Vendors / Technologies shared in this Roundtable 55:.....	18
Appendix A: All Poll Results.....	19

This transcript is from a videoconference. It may contain misspellings and grammatical errors. To preserve privacy, names have been abbreviated and organization names have been deleted. NOREX retains the unedited version in order to facilitate future networking. For networking assistance, please contact your NOREX Member Success Manager.

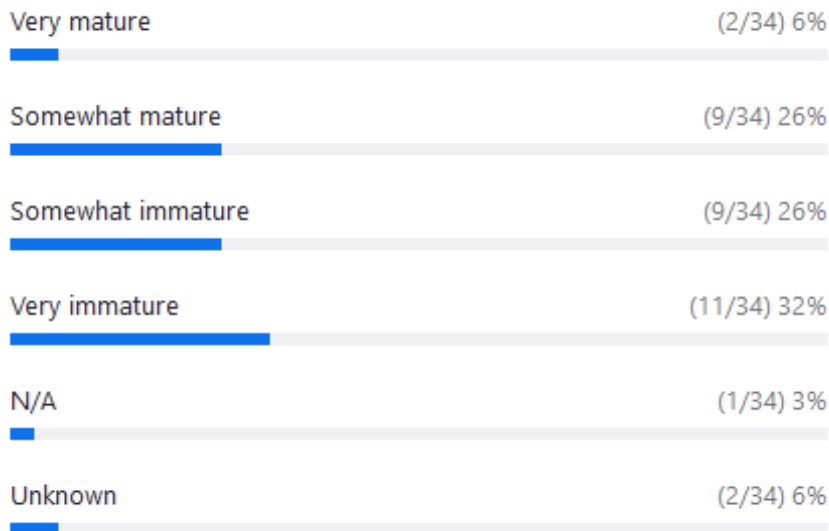
© Copyright by NOREX, Inc., 5505 Cottonwood Lane, Prior Lake, MN 55372. The opinions expressed in this document / recording are those of NOREX Members, not necessarily those of NOREX, Inc. This document / recording is for NOREX promotional purposes and for use by NOREX Members only. Unauthorized use or distribution to non-NOREX Members is strictly prohibited.

NOREX Roundtable 55 Transcript
IT Service Management
December 8, 2022

TOPIC: Adopting a formal ITSM practice

Moderator: Every organization is doing some form of IT Service Management, whether you're small or large, whether it's formalized or not formalized. I thought it would be good today to start out with a poll to see where folks are at with the maturity level of their ITSM process and procedures.

POLL: ITSM Maturity Level



Once we see some of these results, we'll start discussing. I can already see as the results are coming in that we have a fairly good range, a few that say that they're very mature and a few that say they're very immature. That is kind of what I expected. I'm going to go ahead and end the poll and share the results. Actually the majority of the folks on this call are either in the somewhat immature or very immature end of the spectrum. That's why you're here is to learn from one another on this. I'm wondering if any of you who have indicated that you're in the more immature end of the spectrum might speak up and ask some specific questions of the group. We have a group of 11 or 12 folks that have stated that they are somewhat mature. We would love to hear from some of you that are in the less mature realm. What are some of the questions that you have for today? What would you like to get from the session today? Are you just starting or are you at the point where there's a tipping point in your organization where you need to formalize some of your processes and procedures? One of our next questions is around ITIL, which would be the framework for some of this and other frameworks. Who can start us out?

Tommie D.: We're in a very early stage. We have an incident management solution, but it's so basic where it doesn't adopt all the other features of a good ITSM practice. We really want to do something on a global level with all our members. We're talking about 300-400 users that will use the ITSM system to support 6,000 users throughout our facilities, so the scale of that cultural change is something that I'm eager to learn how others have done that in the past. Thank you.

Moderator: Thanks, Tommie. Does anybody have any questions for Tommie that would kind of clarify? You say you have an incident management practice - is it a tool that you're utilizing, Tommie?

Tommie D.: Yes, we're using purely Incidents from ServiceNow, so only that module through a shared platform. That's it.

TOPIC: Where to start with ITSM

Moderator: Is incident management a good place to start? Who can chime in on that?

Doug M.: Yes. If you're going to start someplace that's an important one to start at, especially if your service desk or help desk is taking frontline calls. You would probably want to look into tying problem management into that and potentially if you really want to grow, you could get into event management. That would come into play for the network operations, any application operations teams. That's where you really start to mature your overall event, incident, and problem management within the ITSM.

Moderator: Thanks, Doug. Buzz has his hand raised. Thanks, Buzz.

Buzz W.: I would recommend or suggest that you look at change. Change and incident go hand-in-hand. Incident definitely the first, so you can get your arms around it. But normally you're going to find incidents propagated because there was poor change management involved, testing wasn't done, double-checks weren't, collisions with other applications. That's a great debate, even when you talk at an ITIL level, which chicken or the egg. But they both go so closely hand-in-hand. It's kind of a tough call to make. I know for us we put more focus on the change management piece to begin with right off the bat, because if you get your changes right your incidents kind of go away on their own. And then follow up with the incident piece, because all changes don't go well, and then that gives you the opportunity to do your root cause analysis, see what was wrong, and then go back in and see perhaps maybe you have to modify your change process. Does it have to be a more peer review, more testing, etc.

Moderator: Thanks, Buzz. We have a couple of more hands raised. Bonnie?

Bonnie A.: I'm Bonnie. I'm the IT Service Desk Supervisor. We've actually had ITSM in practice where the service desk is concerned for years. But getting the IT other departments and / or businesses to adapt to that has been a very, very slow process. I kind of have to agree with the gentleman beforehand, but it starts with a really good incident process, because everything comes in as an incident and how you then resolve that incident. It could either be on the incident itself, it needs a root cause analysis, and then change management. We have all of those in practice now, and people are starting to adapt to all of this and the ITIL terms. We're trying to put in where everything comes in as an incident, then it's going to be resolved in the change management, and then followed up with a root cause analysis in the problem management. We're on the path going that way.

Moderator: Thanks, Bonnie. Todd, you had your hand raised. What is your perspective?

Todd S.: We're kind of early adopting. We have a couple of different things that we use currently. We are a utility, and so we've kind of adopted SAP which is kind of a work management tool. But it's not really good for what we do with IT. We actually have a team just recently looking at implementing ITSM and ITIL. I believe the gentleman before mentioned the change management stuff. If you get the change management down first, and that's kind of what we're tackling now is it's identifying the change, the communications on the change, and all of that. Myself and another individual on this

webinar we co-manage the IT support and the IT Service Center within our organization and we made things work, but it's not really ideal for an IT organization. That's where we're looking at how we can improve that.

Moderator: I'm going to ask Fred to speak because he has his hand raised. While I do that I'm going to ask Chuck or Paula to help out. Can we poll the primary implementation? I'm assuming you mean what order you do things, Tommie, and the order folks have taken things in.

Tommie D.: Correct.

Moderator: Is there a way that we can do that on the fly? I'll let you guys take a look at that while Fred joins the conversation.

Fred H.: Good morning, everyone. We are a not-for-profit organization. We have about 250 employees that work statewide for healthcare advocacy and reform. We've had a help desk and overall management of IT systems for about 20 years now. A couple of the things that we've really seen benefit that group is making sure that all of our staff really understand that the very best support they're going to get is by putting in a help desk ticket. You have to put in a help desk ticket for everything you can possibly think of, whether you're looking for a new piece of equipment, you have a problem with your keyboard, something's not working on your monitor, whatever those things are. The other gentleman that talked about if you resolve change that seems like all those help desk calls go away. We have a pretty in-depth change control policy but boy, it sure doesn't make all those calls go away. The other thing I'll mention is we do have a tiered support system. We have 3 different tiers, and for the sake of argument we'll just call them Tier 1, 2, and 3. We have experts in that area. The basic level call comes in, and if it needs to get escalated within that team, it keeps going to the people that have the most experience. We do have a few folks that have been there for 15-20 years, so they have a lot of experience in that in that area.

Moderator: Thank you so much. We've got a couple of more hands raised, and I'm informed that we're not able to do a poll on the fly right now for Tommie. I'm looking back up in the chat to see. He wondered whether folks were implementing incident, change, problem, or event, and what order you're doing that. If you could just maybe put something in the chat that would indicate what your company is doing, then after the fact I'll tabulate that and we'll be able to report that on the transcript. Doug, do you have your hand raised?

Doug M.: Yes. I saw Tommie's question come up and since we couldn't do a poll I mean, basically everyone's comments hit home because Buzz touched on change control. And that is really where it starts because industry metrics, 80% of our IT problems are caused by changes or human error. That's from a cause perspective. But the other thing to what Fred alluded to is, change by itself does not stop incidents from occurring. But problem management, that's where that steps in. Doing root cause analysis and determining what the root cause was, and that could be anything from your QA process which goes into change control is not as diligent as it could be. One of the situations that we face here is our lower development environments where we test and QA in don't mirror production. We have a hard time simulating production users, production traffic, simultaneous connection. From a QA perspective while we do it, we have room for improvement, but it starts with infrastructure. So, Tommie, to your question, the way that I would do this you definitely need incident to start tracking issues. But change control is a close second, and then problem is right behind it. Event management is more of a maturity thing. That makes you a little more proactive in anticipating things that may start bubbling up that haven't yet caused an outage of any sort. But it could be an indication of something coming down in the near term or the future term. I don't know if that helps at all.

Moderator: Thanks, Doug. We'll take one more comment on this, and then we're going to move on to the next couple of slides which will continue this discussion. Go ahead, Buzz.

Buzz W.: I think one thing that came out of listening to everybody's great comments, and all of them have been wonderful, is maybe a clarification of where this gets implemented. We have a Technology Service Desk too. It takes lots and lots of calls and tickets have to be open. A laptop, I want a new piece of software added, something of that nature. When I'm speaking about change management from our point of view, I'm speaking about changes to infrastructure that could affect the enterprise. I'm not talking about the daily operational changes that would happen with something. I'm talking about this a change. This could cause an outage, this could cause a problem in our world. That's why I say from that point of view, getting the change management piece correct up front is going to help reduce the amount of incidents that you have, which will then reduce the amount of problems you have and so on down the line. It's a chicken or the egg. Do you use the incident process to help you develop your change management process? Which I know we did way back when, but when I speak to this from an ITSM practice, I'm talking about enterprise changes that affect the enterprise. Not one-offs like I need something new for a laptop, or my VPN isn't working, or something like that. All those calls go into the Technology Service Desk, and we don't require change processes for those.

CHAT:

Tommie D.: Can we poll on the primary implementation?

1. Incident?
2. Change?
3. Problem?
4. Event?

Aaron A.: In our help desk, we have incidents vs service requests that the user can choose. Incidents for us are actual issues whereas service requests are new requests where nothing is broken. We also use change management for any production changes.

Buzz W.: Suggest using incident to help develop your change management process, but I would look at change first. Also, don't forget SLM.

Kim D.: We follow the same as what Aaron describes.

Jody M.: Incidents need to be completed right away. Service requests need to be completed but not a priority. That is how I have set things up in the past.

Lena R.: We do as well. We are challenged that majority of tickets are created via email so they all start out as incidents. If it ends up being a request, converting it is a somewhat tedious process.

Aaron A.: Agreed, Jody. It helps us set a priority / urgency.

Aaron A.: @Lena, we used to allow email to ticket. We stopped allowing that and enforce that users login to our ticketing system portal to open a ticket. This helps with reporting on our end (category, ticket type, etc.).

John S.: Incident.

Gram S.: Incident first.

Stephen J.: Incident would be the first priority followed by change management.

Fred H.: All of the above.

Bonnie A.: Incident first.

Jim J.: We're working on all of the above. 😊

Jill K.: All of the above.

Kristina G.: I would recommend doing it in the order you have them listed.

Bonnie A.: After incident then we created change.

Hesther B.: Incident, change, service request, task, onboarding and offboarding.

Lena R.: Thanks Aaron. There was discussion around that but the decision was made that it would be too much of a negative impact to require internal customers to go to a portal. In my opinion the portal is too much done from an IT perspective. People should not have to know whether their need is a request or an incident first.

Nick S.: For us, all incidents start as an email from the end user and triage occurs when it hits the inbox. There we flag the type of request and flag the appropriate priority.

Tommie D.: Thank you.

TOPIC: ITIL

Moderator: Thanks, Buzz. There's actually a lot of great information happening in the chat, which will be included in the transcript as well. We're going to move on to my next slide, which was submitted by Jennifer. It's just a general question that maybe we should have taken first, a building block question. She's wondering is everybody here an ITIL shop or is that the framework that you're building your ITSM upon? Just a few comments around that. Buzz, you can start us off.

Buzz W.: Yeah, I just typed mine in. Yeah, back when I had all the processes and were building up about 5 years ago, we were ITIL 3. They're moving into aspects of ITIL 4. It's more around the controls basis of it, if you look at 4 it's more like little nuances and things they didn't so either one of them. I think if you're starting out as a good place if you haven't done anything, I'd start with ITIL 4, because that's the current one out there.

Moderator: Are there other frameworks that folks are using? COBIT, ISO, DevOps? I mean are those competing frameworks or is ITIL basically what everybody's utilizing?

Buzz W.: I think that even if you look at DevOps it still blends into what your ITIL practices are. Agile methodology, all that, it still intersects with your ITIL practices. I would say that it's definitely the prevalent practice and framework that's being used out there for change management. I don't hear very much of other companies using different things, at least not at a large scale. That's just my thought. It's been around, has been for quite some time. ITIL 3 was here for almost a decade, so it's solid. People get used to it, they understand it. It's that common lexicon. When people start talking

like we all understand, change, service level management, event management, problem, it brings it all together.

Moderator: Thanks, Buzz. Doug, what do you have to say about it?

Doug M.: Agree with Buzz. You know, my first certification's back from V2, so I've seen it grow and expand. The thing is with ITIL it blends so well with all those other practices that you've talked about, whether it's Six Sigma, COBIT, all of those. ITIL was flexible. It's not rigid, so you can introduce it into your organization at whatever level you need. It just encourages process and formal process. But yet processes can't get into the way of the business, an ITIL will permit you to have that flexibility. I think that's why I'm a strong proponent for it. We are expanding into other practices. Incident, problem, and change is fairly mature but I'm pushing for more of the demand capacity planning from a strategic standpoint at the start of projects, at the start of new architecture that we're looking at how that's going to impact the business going forward and bringing some of those practices in place as well.

CHAT:

Buzz W.: ITIL 3 moving into 4.

Ryan S.: IRs mean you're unable to do something that's now prohibiting your ability to work. No network connectivity for example SRs are requests like I'd like an additional monitor in my office, or a wireless keyboard instead of a wired one, etc. You're not down or unable to function. *In our structure.

John S.: That is the dream.

Brian S.: Just starting out.

Tommie D.: Just starting out with ITIL indeed. v4

Ryan S.: v4

Stephen J.: Components of ITIL.

Doug M.: We are expanding our ITSM practices.

Kristina G.: We use some ITIL framework.

TOPIC: CMMI

Moderator: Thanks, Doug. We've got a chat from Nitin. Anyone using CMMI? I'm not familiar with what that means. Nitin, would you like to expand on that?

Nitin T.: Sure. CMMI is another model out there. We have some contracts that require CMMI. We have some projects in our organization that are more advanced in their journey. Corporately we're not as advanced and we're looking to enhance things we do have. Internally, I have a struggle of hey, do we want to go with some of our project needs and corporately do CMMI? Or it seems like a lot of folks are really focusing on ITIL, is that where the industry is going, and we just have to crosswalk our controls for these projects.

Moderator: Any comments for Nitin?

Doug M.: I'm not familiar either with CMMI. I would have to do some research on that. But I would be interested to see if other people agree. ITIL has been the foundational structure that most companies have adopted. It's easy to adopt, whereas some of the others are a little more complex and a little more focused to specific industries. But ITIL seems to be flexible and can fit in just about any situation.

Nitin T.: Thanks for the feedback. Yeah, CMMI is not something that internally we looked to implement. It was very much a requirement of some contract. For me it's okay, which one makes more sense for our company?

Buzz W.: CMMI is usually used to give you an idea of where your maturity level is on any process. If you think about it from that standpoint, it's a consistent methodology out there. Five levels, I don't know, start to you're an expert or something. It's like 5 different levels and your maturity of your processes on CMMI. I know Agile uses CMMI a lot to look at it and say where are you at on the Agile maturity line. But it's the thing with CMMI and my contracts usually required is like they want to know where you are to start at, like where do you think you are? How much talent do we need to have? CMMI can be used with almost any type of framework because it's really looking at the maturity level of where you're at in that specific place.

Moderator: So you could use CMMI to see where you are at with ITIL framework?

Buzz W.: Sure, if you wanted to do a CMMI maturity assessment on say your change management process, you could go ahead and do that and it would give you it. It's just this consistent rating methodology. They ask you a bunch of questions, like can you, will you, do you? It's out there if you look on the web.

Nitin T.: That's very useful. Thank you.

TOPIC: Lessons learned for early in the process

Moderator: We're going to move on to the next couple of questions which are more general. This is a general question which I think we have been addressing all along. What are others doing that has worked well and what has not worked well? Is there any more discussion, any stories about what has not worked well? We've heard a lot about what's working well. Any discussion around lessons learned? Your hand is raised, John.

John S.: We're small, and probably in this median term will be growing from like 100 maybe to like double that. If there's things you wish you would have known when you were smaller and that you've grown that you're like I definitely should have put this in place to not cause a problem. So on that same framework, but ah, that would have been nice to know at the beginning of my journey.

Moderator: One of the questions that I was thinking about asking was, is there a tipping point that you have to go to the next level of formalizing your ITSM, or maybe that's the same question. Any thoughts for John for those organizations that are growing and looking at implementing? Gram, your hand is raised.

Gram S.: Hi! Our company is about 1,300 employees now. I think when you're looking at this, tool selection is important. Because I think that people are going to go hey, like ServiceNow and Ivanti, these big tools, that's ITIL. And if you're really small those tools will crush you. They're completely unnecessary. Don't look at your tool and say I'm going to buy a tool to make my thing work. Look at the things you're doing and the processes you're taking over and do them well and grow from there.

Accept the fact that you'll probably end up with tool replacements every few years as you mature and grow to make it work. But if you just go, we're going to be an ITIL shop, and ServiceNow is the best in breed for ITIL. We're going to do that in Europe - seven person IT shop. You're going to be really unhappy with that decision for a number of years.

Moderator: And it's such a huge investment. One of the questions I thought of too is are there other tools that can be repurposed as you grow and utilize for what you're talking about before you step into the huge investment of a ServiceNow, or a tool like that?

Gram S.: To add on to that, though, I would say in that exact vein, looking at the customer service tools up front can be really great. They're really flexible. They're not built necessarily for IT. They tend to be a little cheaper, and oftentimes if you're just looking for incident first and you're building your incident practice like tools that are customer service focused platforms oftentimes are very flexible. They might take a little bit of work to massage them properly, but they're a little cheaper.

Moderator: Can you provide an example of a tool that you that you're talking about?

Gram S.: Zendesk is a really great example. Again, it's not an ITIL tool. It's not going to prop up your framework, but it's cheap. It's easy to prop up. It's pretty flexible. You could do some neat stuff with it, and it can be a good stepping stone into a more IT focused platform that is going to require less weight on the administration side. There's a variety of tools out there like that that are their low admin weight. But they're not going to necessarily support an ITIL methodology in their built-in processes.

Moderator: I have a poll coming up that is going to ask you what tool you're using. Unfortunately it's all the big ones on that poll. Perhaps we can talk about transitional tools before we get to that. We have a couple of hands raised. Let's go to Jim.

Jim J.: Hi! Good morning. We're a manufacturing company. We have about 500 employees and a small IT team of about six, five of which are developers, and that leaves me as the IT guy. When I got here they had nothing in the way of ticketing or anything. We started looking at what it was going to take to get us where we wanted to be in the long run and ended up using Salesforce's watered-down ticketing solution, which was an absolute disaster. To echo what he was just saying about Zendesk low admin cost. We're dumping six months of Salesforce paid services and going straight into Zendesk. So far, so good. It doesn't fit the ITIL framework. We're using it just for ticketing and basic change management, but it's a good stepping stone for a company that's been here for 30 years and has never done anything like it.

Moderator: Can you throw a link in the chat, Jim? That would be great. Thank you. We have a couple more hands raised. Doug?

Doug M.: Gram, to your point, yeah, ServiceNow is like buying a Ferrari if you just work 2 blocks away from your house. It gives you a lot more than what you need. One thing to keep in mind is if your business has any type of compliance requirements, whether it's around SOC or anything else, having a tool that you can document. That's the key. One of the tools we use here - we have ServiceNow and we use multiple capabilities within that tool. But Smartsheets is another tool that we use for some project management that gives you some flexibility. Excel templates, Word templates, as long as it's a template that you can document and retain, then that covers your compliance requirements and capabilities. Then there's other ticketing systems out there that are not built on the ITIL methodology like ServiceNow is. They're still costly. They have a pretty hefty price tag, but maybe they don't give you all the bells and whistles that ServiceNow does, but they do give you basic ticketing functionality.

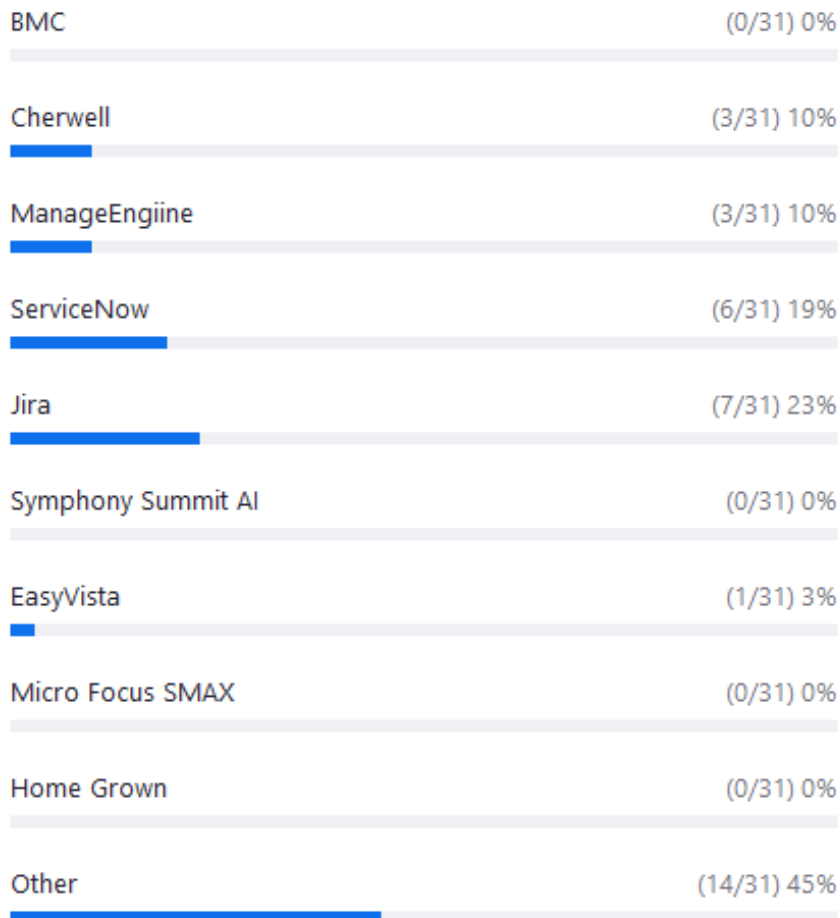
Moderator: Did you name those?

Doug M.: Yeah, like CA Service Desk is one that we'd use here. Remedy was another one going back in the day, and again we've been on ServiceNow for about 7 years so I've lost track of some of the maybe the newer programs that are out there. But there are others out there. Some have their niche based on the industry. I think most of the large companies are gravitating towards ServiceNow just because it's built on that ITIL methodology.

Buzz W.: One of the original questions was if you're starting now, what's important or what do you wish you had? It's really important to have an accurate CMDB for any of these types of things. And if you're small and you're just now starting out be so deliberate and tenacious about having an accurate CMDB. Not only where all the assets are, but what all the assets interact with, because as you move forward in this it's going to be more and more important, especially when you get to trying to and resolve an incident. Trying to decide whether or not this change is going to impact anything else you rely heavily on that CMDB. So if you can start out with that, that's a great thing. Another software out there is Cherwell, of course. That's out there quite a bit. But again all the ones like Remedy, Cherwell, SharePoint, ServiceNow, they come with a pretty high price tag. I know some startups that are using Jira. Jira is relatively inexpensive. You can set up cards, you can configure it to the way you want. You can require approvals. They can move forward to the processes. You can set your columns up how you want to move them forward. And again, it gives you - the nice thing with Jira is it gives you that trackability from an auditor standpoint if you have to show them who approved this, who signed off on it, etc. It also allows you to create some pretty nifty dashboards out of the box that you can show progress and how many you have in flight and that type of thing. Just a couple of other ideas.

Moderator: I did put up that poll since we're talking about tools right now, because I heard some of the tools mentioned even for smaller organizations like Cherwell and Jira and of course the behemoths like ServiceNow. The last three on the tools I threw on this poll, because I was looking back at a transcript from last year, where a few companies were looking into the Symphony Summit AI product, and this SMAX product. I was interested to see if those had gained any steam. And interestingly, nobody has clicked on those. Let's see where we're at with the poll. Cherwell, ManageEngine, ServiceNow, and Jira are the ones that have responses. The others have no responses so far. I'm going to end the poll and share the results, and you can see what folks are using. Nobody clicked on BMC. The two largest are ServiceNow and Jira, somebody's using EasyVista, and there's a whole lot of "other". Let's talk about that.

POLL: ITSM Tools



Fred H.: Using ServicePRO. It seems to be fairly cost-efficient for us, doing a just a few thousand help desk calls per year. The one piece that lacks is any type of follow through or actual specific change management. But as far as ticketing goes it's really nice, because end users all they need to do is send an email to the help desk and it automatically generates a ticket. We're able to immediately start tracking that, and then individuals can go in and look at the actual service ticket itself so they can see the progress on it if they'd like to, or most definitely they can pick up the phone and call the help desk and we can give them those updates as well. It seems to be a pretty good balance and a fairly low end to middle end type product. Cost efficient for us, fairly easy to use, not a lot of set up out of the box, and a lot of flexibility.

Moderator: Thanks, Fred. Kristina, you have your hand raised.

Kristina G.: I was just going to say we're using ConnectWise. However, we're using it through our MSP. There's not a whole lot we can do in terms of customizations. So far it's working out pretty well for our small team.

CHAT:

Tommie D.: Process first, tool second.

Buzz W.: JIRA may be an option for starting out.

Aaron A.: We used Spoke as a ticketing system a few years ago. It was very simple, but we quickly grew out of it.

Gram S.: Tommie - Exactly that!

John S.: <https://www.zendesk.com/pricing/#everyone> Had it up already ;)

Jim J.: 😊

John S.: I'm familiar with Jira and was also looking at Jira Service Management.

<https://www.atlassian.com/software/jira/service-management/features>

Kim D.: We are on Invanti / Cherwell but will be moving to another tool within the next year. We use JIRA for some things as well.

Aaron A.: We use ManageEngine ServiceDesk Plus Cloud. It has all the features we need in incidents, requests, problems, change records, CMDB, projects, etc. It lacks in 3rd part integrations.

Jody M.: I have used Remedy and ConnectWise and SysAid. I prefer ConnectWise or Remedy.

Ryan S.: TDX

Stephen J.: We moved from Remedy to Dynamics 365 for Customer Service. Quickly realized that was not the correct tool and are now looking to implement ServiceNow.

Doug M.: CMDB could be a Roundtable discussion in itself.

John S.: Poll is missing "Email" ;)

Kristina G.: LOL

Gram S.: CMDB is a great call out. Something that gets more and more difficult to put together the longer you wait.

Troy A.: Small team here, using Freshservice.

Gram S.: Much simpler to build up front than it is to build 10 years in.

Kristina G.: We're using ConnectWise via our MSP.

Fred H.: ServicePRO

Hesther B.: We are using Service Manager from Ivanti.

Paul N.: Freshservice.

Brett D.: Moving to Freshservice.

Tommie D.: TOPdesk.

Jim J.: Other: Salesforce now, moving to Zendesk.

Jody M.: We are using SysAid at the moment.

Brian S.: We use Quest KACE Service Desk (small team of 3) for ticketing.

Gram S.: Jim, it's worth looking at SweetHawk as an add-in for Zendesk.

Tommie D.: @Brian, that is former Dell KACE?

Jim J.: I used ConnectWise in a previous position and it was fantastic. Though it is focused, I think, on the MSP market.

Gram S.: They make a bunch of ITSM add-ins for Zendesk that can be really helpful for IT groups.

Jody M.: ConnectWise is nice because they also use ConnectWise automate for an RMM.

Gram S.: Happy to talk offline too if you would like about our experience with it. We've been on Zendesk for about 6 years.

Brian S.: @Tommie Yes that was a Dell product and has worked well as we have grown but I don't know about ITIL.

Moderator: Thank you. And we've just witnessed one of the issues that we moderators have when we think we have a good list of tools and everybody's using something else. Apologies for that. But it's great to hear the other tools that are out there, and you can put more information out in the chat. I was thinking about pros and cons of the tools, and we've already talked about which tools are better for different organization size, customization. Are there cases for implementation partners, who owns the tool in your organization? How is it organized? Any of those thoughts that you would like to talk about?

TOPIC: Tool Customization

Doug M.: Just a caution on when you mentioned customization. You know when you get a tool out of the box and you customize it to meet your own business needs, every time you upgrade that tool those customizations either go away completely or have to be rebuilt. One of the things when we moved from CA Service Desk which was heavily customized and I inherited that coming in. When we moved to ServiceNow we really tried to make everything as it was out-of-the-box work for us. Now we've added some customizations over the years, but we keep those to the minimum because every time you upgrade it poses a challenge. Just a word of caution to others out there. I would be interested in hearing if others have experienced similar things and how they've dealt with it. But just a thought.

Moderator: I see a lot of heads nodding. Another great reason to have our cameras on. As I researched for this and read some other transcripts, I found that to be true from others, where it seemed like it was better to customize your workflows and your processes to the tool versus the other way around. Is that is that a good way of putting it?

Doug M.: Yes, absolutely. When we were talking about the CMDB I put in chat that that in itself could be its own little tabletop discussion. I've implemented 4 CMDBs over my career, and I failed on all of them because they just they're so complex, and you can try to get so much detail. Things sound

great, but it has to be sustainable. It has to be scalable, and if you get too detailed, keeping it current and up to date is a nightmare. That's really a challenge. Same way with customizations. A lot of times the more complex you make things it just causes problems down the road. Keep it simple, let your business grow. Gram mentioned in your infancy don't get too complicated out of the box. Don't try to do too much day one. Just grow into it because there's so many things you don't know day one that you discover, and if you try to anticipate too much that causes problems.

Moderator: Thanks, Doug, and before I go to Buzz I just want to note that in the chat Gram is offering to talk offline with folks that would like to hear more about Zendesk. You've been working with it for about 6 years. Just take note of that and if you would like to connect with Gram we'd be happy to facilitate that, and maybe even have a group discussion around that tool. Thanks, Gram, for offering that.

Buzz W.: The thing too about the CMDB, it's got to be automated. If you don't have an automated process to pull in this data and keep it up to date it won't ever get to where you need to be. As far as customization, I put in a chat it's evil. What we have to be is fanatics about well this the way we've always done it, or we need this because.. No you don't. Here's a new way to do it. I understand it doesn't give you the green dots like you used to have. Now you have red triangles. And if you are fanatic about not allowing customizations and really pushing back to the business and to IT groups it's going to help you in a multitude of ways, because it's going to start driving consistencies. Most of those customizations that you see that are done is because this group wants it this way, and this group wants it that way, and another group wants it in another way yet still. Just say no. Say hey, you know what? This requires however high you can go into your organization approval for us to make this customization, and please provide a business case as to why we have to do all this extra work. Because it will keep you from doing upgrades. And what's going to happen in the world we live today is there's going to be a security vulnerability that's going to come out, and you're going to have to upgrade to the latest version to fix it. And you're not going to be able to upgrade to that latest version quickly because you've done all these customizations. And there you're going to try and figure out what other remediation plans can I put in place to keep you from getting hacked and other bad things happening. Just say no.

CHAT:

Buzz W.: Customization is EVIL.

Tommie D.: That's the lessons we learned, no customizations. 🙅

Jody M.: Thanks Buzz.

Moderator: Just say no, I love it. Thanks. Buzz. Always great insights. Any other discussions around this? We have some specific questions regarding some tools, and I want to make sure that we have time to get to them. Let's go to those now from Bonnie. You had three specific questions around integrating Microsoft Teams with your service management tool, and I'll just go to the next one and maybe we can address them all together. Integrating SharePoint with your service management tool. I think your last question was a self-service knowledge management tool. I think that's different than the first two. Let's address the integration of these other things together first. Bonnie, can you share a little bit with us?

TOPIC: Integrating Teams, SharePoint, and Knowledge Management into ITSM Tool

Bonnie A.: We were last year evaluating integrating Microsoft Teams into Cherwell. We use Cherwell and actually were evaluating going the chatbot way. We haven't done so but I just wanted to put it out there to see if any other companies have done that with their service management tool, if they've been successful, and if they have, in what way? And then the second one was also with SharePoint, if they've integrated with maybe Forms or anything that they've built in SharePoint that they could have integrated back to the service management tool in any way. I think the third one was knowledge base. We're trying to actually get a knowledge base into place. We really didn't like the way that Cherwell's knowledge management tool was set up out of the box, and I was just wanting to get other opinions on if anybody has actually used or built a self-service knowledge management within their tool.

Moderator: Gram, your hand is raised.

Gram S.: I'm going to say what Buzz is thinking right now, which is customization is evil and start there. I think that you really want to think about what your tools are set up to do and are capable of and let that guide those decisions. We've had conversations internally about SharePoint, because we're a SharePoint shop and how we can integrate those on Zendesk. Zendesk has a very robust built-in knowledge management system, because it is a customer service tool. A lot of it's built around self-service and answers. People were talking to me about how we can integrate all these documents we have in SharePoint into what's happening in your ticketing system. And I said we can't. We're not going to do that because we already have a platform that does that. I think starting to separate some of your thoughts and concerns that way, start thinking about what is your tool capable of and what its integration points are. What does it do already out of the box, and how can you adapt your business and the business requirements that are coming at you that are making you think about those things into the tool you have instead of bolting on random stuff? Which then to Buzz's point, Cherwell's going to make an update to something different. You're going to have to go reevaluate every one of those bolt-ons, realize that six of them don't work anymore. Evaluate business impact to those six things, discuss whether or not they feel valuable. It starts to get really messy, and eventually gets to the point where you really have too many things in the backpack that you can't move forward. Every time you have a question I would think back to what your tool is capable of. What's the actual business requirement? What is someone actually asking you to do functionally? Not what are they asking you to do literally.

Moderator: Thanks, Gram. We'll go to Buzz and then we'll go to John.

Buzz W.: Yeah, I love that comment. If someone comes to me and says I want to use this tool, I say okay, let's stop right there. Tell me what you need to do, because I want to make sure I'm using the right tool for the right reason. We're a ServiceNow shop. ServiceNow has a tremendous knowledge base which we use. But one of the things that we found difficult because we have a separate organization that runs ServiceNow, and that the TSD, or Technology Service Desk, wants to go through is I kept running into the problems because of the amount of time it took to update knowledge because of all the processes we have in place that would go through it. One of the things I did differently using SharePoint this year is I moved all of my knowledge into SharePoint. I left the links in ServiceNow. Now I can update something to change this morning, and when that person looks it's got brand new data! To me that's using something. In other words, I'm still using ServiceNow for the tool for the knowledge base. But I'm augmenting the velocity by pointing it to a different source to pull this data back in. We've built some chat bots too that help answer questions, and their capabilities with APIs that you can do that within ServiceNow. Don't know that's the place to do it. It's a lot easier to do using Power Automate and some of the other pieces within SharePoint. Always look and see if the

squeeze is worth the juice. It's like we're an IIQ shop, and it can integrate with Teams, and it can send all these things to it and get all these approvals. Okay, does that really give me a benefit? Is that going to help improve the business? And that's what I liked about the comment from the previous gentleman. It's like, what's your business case to do this? How is it going to make the world a better place to live? And if they just go well, I want it. Wants are good. It's like must dos, should dos, some could dos. Wants to me are coulds, unless you can come on with a really good business case.

Moderator: Thanks, Buzz. I love that. If the juice is worth the squeeze... that's awesome. I'd never heard that one before. We're going to go to John, then Todd, and then we're going to go to additional topics that anybody has. John go ahead.

TOPIC: Knowledge Management Tools

John S.: In my previous life we used Confluence for our knowledge base. I think on the tool side it's also valuable that if you find a tool that solves more problems than just an IT problem then that's perhaps a good one to look at. Confluence if you're not familiar with it, it's basically you get to create multiple Wikipedia's that do whatever you need them to do. It has all sorts of icons and what that allowed us to do is create knowledge base not just for IT, but for HR, accounting and then you can use tools. I think the important thing, though, is you don't want to split everything out. Like if it's IT we want to go here to look for the problem. If it's HR we go here to look for information. One of the nice things that you can do with Confluence and other sort of CMS based things is, you can create pretty good integration. We created a source of truth in Confluence and then we would sync it out to other places. If in Zendesk someone to look wanted to look up I helped us link a help desk article. We didn't update it in Zendesk we updated Confluence and then synced it over into Zendesk. And so I think we saw that single source of truth for organizational knowledge even though it was a different tool from what were using for incident management.

Moderator: Thanks, John. Todd go ahead.

Todd S.: I was just going to comment on the knowledge management tool. Since we don't really have a formal service management overall like ServiceNow or anything like that, we found a product called ComAround. It's by BMC. We've been using that for probably about 2-3 years now, and we use it for both internal IT knowledge base, knowledge retention as well. But then we also use it as a self help for external for our customers that we basically support. It allows them to get in and they can open up articles, and it walks them through either a video or walks them step-by-step, screenshots exactly what they need to do. We've also opened it up to other business units like our HR department, our accounting departments, security groups, and they have the ability to do their own knowledge retention, knowledge base within their own group as well. It's worked out pretty good.

Moderator: Could you put a link to that product in the chat for others to take a look at? Thank you so much. This has been such a great discussion, and I've learned so much. You guys have just taken it away. Everybody have a great rest of your day.

CHAT:

Buzz W.: Thank you, this is a great discussion. I appreciate everyone's insights. 😊

Lena R.: We are starting to look into AI chat that would integrate into Teams and SharePoint but still very early in the evaluation.

Peter B.: We're small, but using Jira Service Management and Confluence for Knowledge Base sdvfn.

Lena R.: Does anyone here consider themselves successful in driving self-service while also being a great experience for the customer?

Kristina G.: Excellent conversation. Thank you for hosting Dawn. I have to drop.

Tommie D.: Thank you for the good discussions. Appreciate all the feedback!

Kim D.: We do a fairly good job on managing incidents and service requests through self-service on Cherwell but always looking for ways to improve the process and customer service.

Todd S.: <https://www.bmc.com/info/comaround-functionality.html>

Stephen J.: Thanks everyone.

Paul N.: Thank you everyone, and thank you, Dawn. Great facilitation.

Troy A.: Welcome back and good job!

Jill K.: Thank you!

Dan L.: Thanks all! Good stuff!

Kim D.: Thank you - great discussion.

Jody M.: Great work, thank you.

Brian S.: Thank you all. Many pages of notes. Great discussion everyone!

Jim J.: Thanks!

End of discussion

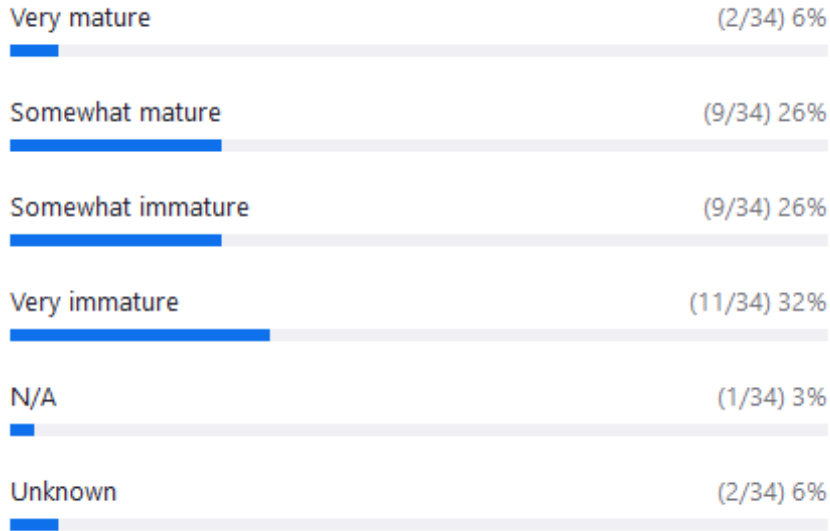
Products / Vendors / Technologies shared in this Roundtable 55:

CA Service Desk
Cherwell
CMMI
Event
Incident
ITSM
Knowledge Management
Problem
ServicePRO
Teams

Change
CMDB
Customization
Freshservice
ITIL
Jira
ManageEngine
ServiceNow
SharePoint
Zendesk

Appendix A: All Poll Results

ITSM Maturity Level:



ITSM Tools:

