

Toolkit

The IT Peer Community. No Vendors. Ever.



HELP DESK / SERVICE DESK

These NOREX Member-contributed documents include RFP, onboarding, offboarding, ticketing, tracking, incident management, guides, resources, scorecards, reports, service catalog, ITIL / ITSM, job descriptions, discussions, and polls. | TK006

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**TO REQUEST A DOCUMENT FROM THIS TOOLKIT,
NOTE THE TITLE / NUMBER AND ADD THEM TO THE
COMMENTS AREA ON THE REQUEST FORM [HERE](#).**

Guides & Resources

MOVING YOUR DESKTOP COMPUTER This document describes disconnection and reconnection of desktop computers, monitors, and their accessories. 8 Pages (20-1069)

IT SERVICE CALL PROTOCOL During the COVID-19 crisis, a protocol was established for help desk support which includes virtual support, concierge service, house calls, and new employee onboarding. 1 Page (20-884)

ITSM ADOPTION PROJECT Presented here is an IT Service Management project described from process planning to deployment and governance. 18 Pages (20-866)

NEW USER PROVISIONING DIAGRAM This workflow diagram shows the process a new user would follow for service desk, training, and security. 1 Page (20-865)

EMERGENCY PATCHING STEPS This document shows the out-of-band patching steps for deploying emergency patching via Symantec Client Management Suite (Altiris). 6 Pages (20-843)

CALL FLOW DOCUMENTATION The following provides information on documenting a company's call flow. 6 Pages (20-316)

CALL FLOW Q&A These questions can help gather information used in determining a company's main phone needs, as well as paging, auto-attended lines, call-forwarding, and after hours messages. 2 Pages (20-315)

TRACKIT TEMPLATE An example of a TrackIt asset management worksheet. 1 Page (20-246)

HELP DESK GUIDE The document begins with a review of Help Desk services, how to access them, and when they are available. The support process is then described. The section on Service Standards identifies the approach to prioritizing requests, the service standards IT strives to attain, and escalation procedures. 16 Pages (20-245)

HELP DESK QUICK REFERENCE GUIDE This quick reference guide is prepared to highlight key processes and standards that the Help Desk follows to support the team. 3 Pages (20-244)

SERVICE PLAN TEMPLATE A Service Plan is designed to transition the sustainment responsibility from the project team to those involved in ongoing operations. 11 Pages (20-236)

SITUATION MANUAL INSTRUCTIONS Provided are instructions and tips for customizing each section of the Situation Manual (SitMan) Template. 7 Pages (20-233)

DESKTOP COMPUTING STANDARDS Standard workstation equipment including monitors, keyboard, mice, printers, and software is listed for task-based and fixed function workers. 2 Pages (20-231)

END USER WELCOME KIT This document guides a new team member in setting up various programs and getting connected with frequently-used resources such as the Help Desk. 2 Pages (20-171)

PHONE ETIQUETTE Often a client's first contact with a business is by phone. The following guidelines will help to make the first impression a good one. 5 Pages (20-150)

SUPPORT DESK ESCALATION PROCEDURE When issues being worked by the support desk teams fall outside of the scope of what a support desk can handle, an escalation is required. 4 Pages (20-148)

HELP DESK GUIDE This guide serves to improve support by improving the prioritization of work and clarifying the process, roles and responsibilities. 16 Pages (10-1737)

CONTACT CENTER OVERVIEW The use of a Cisco UCCE platform and a diagram of contact center technology are outlined in this document. 2 Pages (50-282)

Incident Management

IT OPERATIONS STATUS REPORT This report logs incidents by week, severity, status, security, SQL environment health, and more. 8 Pages (20-1173)

IT SUPPORT DASHBOARD This dashboard records requests, average call handle time, incident volume, workload, order requests, and resolution. 1 Page (20-1172)

SUPPORT DESK TRIAGE PROCEDURE This document outlines a procedure to establish service expectations and informs employees of the method by which Support Desk requests will be prioritized and what resolution times can be expected when an incident is reported. 3 Pages (20-926)

INCIDENT RESPONSE PROCEDURE This document outlines a policy for incident response capabilities that are used to monitor security incidents, determine the magnitude of the threat, and respond to these incidents. 4 Pages (20-922)

TABLETOP EXERCISE AFTER-ACTION REPORT The following is an evaluation template of how a tabletop exercise provided insight into how effective the security incident response plan is in responding to a security incident. 5 Pages (20-900)

TABLETOP EXERCISE PARTICIPANT GUIDE This is a guide for participants in a tabletop exercise conducted to evaluate response procedures, communication, and decisions. 5 Pages (20-899)

TABLETOP EXERCISE FACILITATOR GUIDE To validate your company's security incident response plan, a tabletop exercise will be conducted to evaluate response procedures, decisions, and communication. 6 Pages (20-898)

TABLETOP EXERCISE INSTRUCTION This instruction will help you design, develop, conduct, and evaluate a security incident response plan tabletop exercise. 7 Pages (20-897)

INCIDENT RESPONSE PLAN This response plan describes actions that would be taken after a known or suspected information security incident affected its technology system(s) or data. 9 Pages (20-857)

INCIDENT MANAGEMENT HIGH LEVEL DESIGN This document provides a high level or management view of the Incident Management (IM) Process within an IT department. 24 Pages (20-822)

INCIDENT MANAGEMENT PROCESS ASSESSMENT The objectives of this exercise are to document good practice that is performed across all process stakeholders and to identify gaps for improvement. 4 Pages (20-821)

MAJOR INCIDENT POLICY Processes and procedures related to a major incident are described in this policy. 4 Pages (20-820)

INCIDENT PRIORITY MODEL This model helps designate the impact's degree of failure, urgency, priority, and cost. 6 Pages (20-819)

FOOTPRINTS PRIORITY AND SERVICE LEVELS. Prioritization and severity levels are determined based on degree of impact and who is affected. 3 Pages (20-812)

CYBERSECURITY INCIDENT RESPONSE This procedure and checklist describe processes for responding to potential information security events. 4 Pages (20-589)

CYBERSECURITY POLICY This policy is for the development and maintenance of the information security environment and development of IT requirements that are reliable, secure, and predictable. 3 Pages (20-588)

INCIDENT RESPONSE POLICY This policy is for communication, response, mitigation, and remediation of IT related incidents that impact or threaten computing equipment, data, or networks. 3 Pages (20-551)

INCIDENT RESPONSE PLAN An IRP is a formal roadmap to follow when handling suspected intrusions, system misuse, a cyber incident, or any incident where unauthorized access to confidential information has been detected or suspected. 26 Pages (20-382)

INCIDENT REPORT LOG This document provides the guidelines for the creation, maintenance, management, and secured storage of the Incident Report Log (IRL). 2 Pages (20-350)

IT PRIORITIZATION This document focuses on identification of expected response time, prioritization of incident or requests, and target completion times. 11 Pages (20-235)

ROOT CAUSE ANALYSIS REPORT Event recording, P1 data gathering, and component Q&A are included in this report template. 5 Pages (50-393)

P1 - P2 BRIDGE TRACKER This template is for incident and response tracking. 5 Pages (50-392)

APPLICATION SUPPORT MATRIX Support, communication, server & network integration, escalation, and known problem support contacts are logged in this matrix. 6 Pages (50-391)

INFRASTRUCTURE ESCALATION MATRIX This sample site contract list charts infrastructure escalations and business critical applications. 8 Pages (50-390)

INCIDENT RESPONSE STANDARD This Incident Response Standard provides a documented approach for handling potential threats to company computers, systems, and data. (50-293)

SOFTWARE DEVELOPMENT ORG CHART Organization of software development teams are shown in this example chart. 1 Page (50-288)

WEEKLY TREND INCIDENT REPORT Weekly ITS critical and high incident reports are demonstrated as enterprise-wide and divisional categories. 7 Pages (50-258)

MONTHLY INCIDENT REPORTS Following are examples of monthly incident reports from various locations for a one to two year period. 15 Pages (50-257)

ITS OUTAGE DASHBOARD This outage dashboard records critical incidents by count, duration, and cause. 5 Pages (50-256)

ITIL / ITSM

SERVICE SPECIFICATION SHEET This document is used as a template for understanding what components, potential delivery levels, and responsibilities are required to develop and deliver a service. 7 Pages (20-978)

SLA CONTENT INFORMATION This document outlines what main points should be included in a Service Level Agreement (SLA). 3 Pages (20-977)

SERVICE LEVEL MANAGEMENT This document describes the reporting structure for Service Level Management (SLM). 13 Pages (20-976)

ITSM ADOPTION PROJECT Presented here is an IT Service Management project described from process planning to deployment and governance. 18 Pages (20-866)

RELEASE MANAGEMENT PROCESS GUIDE This document describes the release management process, guiding principles, and critical success factors. 28 Pages (20-847)

RELEASE MANAGEMENT PROCESS PRINCIPLE GUIDE Process principles describe and define the principles that drive the design of the overall process. 16 Pages (20-846)

IT SERVICE MANAGEMENT SOLUTION A list of presentation points and scenarios were submitted for several vendors to address and / or demonstrate their ability to meet them. Following is the process of comparison and the final decision. 9 Pages (20-736)

ITIL RUNBOOK FOR DATA CLASSIFICATION The basic configuration and operation support details of the Data Loss Prevention Program - Data Classification System are an information reference to perform a quick health check/monitor and perform basic tasks prior to escalating it to the relevant support person. 22 Pages (20-366)

ITSM TOOL EVALUATION SCHEDULE This template provides a timeline example for ITSM tool evaluation. 1 Page (50-374)

SERVICENOW ANALYTICS AND REPORTING Build interactive dashboards to visualize KPI, track successes, and present your data in an informative way. 15 Pages (50-355)

ITSM TOOL EVALUATION This workbook categorizes requirements for a replacement ITSM tool. Categories include security, storage & archiving, integration requirements, and service catalog. 63 Pages (50-250)

OPERATIONALIZING ITSM The role of the IT Service Management Office is presented with lessons learned regarding orchestration, ServiceNow, and ServiceNow Discovery. 12 Pages (50-244)

Onboarding / Offboarding

IT SERVICE DESK ONBOARDING PLAN This plan includes specific objectives for the first 30 days of work for an IT Service Desk employee, divided into three periods. 3 Pages (20-1198)

ONBOARDING REQUEST FORM This form is used to determine and chart accounts and equipment provisioning for new hires. 3 Pages (20-1164)

ONBOARDING AND OFFBOARDING EMAIL TEMPLATES These templates are examples of typical correspondence from the IT department for new hires or departing employees. 2 Pages (20-1153)

NEW EMPLOYEE SURVEY This survey evaluates the orientation processes for new hires. 3 Pages (20-1152)

ONBOARDING WORKFLOW This chart displays processes involved in onboarding a new employee. 1 Page (20-1151)

IT ONBOARD PROCESS New employee hiring, prep, setup, and training is outlined in this procedure template. 2 Pages (20-1150)

IT ONBOARDING PROCESS This is a general overview of hiring, prep work, and training processes for IT employees. 2 Pages (20-1148)

ONBOARDING PROCESS WORKFLOW This chart shows a new employee onboarding process through various departments of the company. 1 Page (20-1147)

EMPLOYEE ONBOARDING PROCESS This document lists current new employee onboarding processes and describes future changes for a work-from-home environment. 2 Pages (20-935)

OFFBOARDING TASK CHECKLIST This task checklist helps to track what IT-related items have been completed when an employee leaves the company. 1 Page (20-878)

NEW USER PROVISIONING DIAGRAM This workflow diagram shows the process a new user would follow for service desk, training, and security. 1 Page (20-865)

EMPLOYEE ONBOARDING PROCEDURE The following onboarding packet walks the team through the first day on the job to probationary review. It includes helpful checklists and acknowledgment. 9 Pages (20-638)

OFFBOARDING CHECKLIST Designed for an employer, this checklist example applies when preparing for an employee's departure. 1 Page (20-637)

END USER WELCOME KIT This document guides a new team member in setting up various programs and getting connected with frequently-used resources such as the Help Desk. 2 Pages (20-171)

TRAINING TEMPLATE The following is a loose training schedule template for a Help Desk employee. 2 Pages (20-665)

RFP & Contracts

RFP: REMOTE TIER 1 HELP DESK This RFP is for outsourcing of a provider of support services to users of corporate PCs, laptops, and other devices. 7 Pages (20-1047)

IT SUPPORT SLA This document represents a service description and Service Level Agreement (SLA) between the end users and the IT Department in order to provide support from the Help Desk. 2 Pages (20-746)

RFQ: HOSTED CONTACT CENTER The Hosted Contact Center (HCC) contracts are multiple-award Master Services Agreements (MSA) with prequalified HCC contractors for hosted contact center services under fixed-priced, multi-year terms. 14 Pages (20-413)

WEB HELP DESK SLA Following is a Service Level Agreement for web help desk service requests and incidents, prioritized based on impact and urgency. 2 Pages (20-386)

RFI: CUSTOMER SERVICE MANAGEMENT This Request for Information is to solicit suggestions, ideas, or potential Information Services Customer Service Management (IS CSM) approaches on a non-competitive and non-binding basis. 19 Pages (20-314)

RFP: ITSM The goal of this RFP is to identify and select the correct system for replacement for the current Information Technology Service Management (ITSM). 50 Pages (20-118)

Scorecards & Reports

IT SERVICE DESK MATRIX Included in this matrix are IT categories like infrastructure, business, end user services, and their service desk categories and incident levels. 5 Pages (20-1236)

IT SERVICE MANAGEMENT SOLUTION A list of presentation points and scenarios were submitted for several vendors to address and / or demonstrate their ability to meet them. Following is the process of comparison and the final decision. 9 Pages (20-736)

HELP DESK SOLUTIONS MATRIX Several solutions, including Dell KACE, ServiceNow, SolarWinds, SysAid, Spiceworks, and ManageEngine, were evaluated and compared by a user. The features comparison and notes are outlined in this matrix. 1 Page (20-447)

KPI DASHBOARD SAMPLES Following are two examples of KPI dashboards using Power BI for reporting along with ManageEngine's ServiceDesk Plus. 2 Pages (20-349)

VENDOR EVALUATION WORKSHEETS These requirements and evaluation worksheets are for a Service Management System. 6 Pages (20-113)

TECHNOLOGY ROADMAP This CRM Roadmap diagrams years 1 through 3. 2 Pages (20-036)

Service Catalog

IT SERVICE CATALOG This catalog describes how to request service for specific hardware or application problems. 2 Pages (20-953)

IT SERVICE CATALOG Services and categories for submitting a request or reporting an incident are provided in this worksheet. 2 Pages (20-950)

SERVICE CATALOG LIST This is a listing of an IT department service catalog. 1 Page (20-697)

IT NEWSLETTER TEMPLATE The following are templates an IT Department might use to regularly communicate tips and news with the rest of the company. 4 Pages (20-356)

IT SERVICE GUIDE This document serves as a brochure-formatted guide to IT services such as change requests, incident reporting, contact information, & after hours support. 3 Pages (10-1745)

SERVICE REQUEST CATALOG This presentation includes topics of conversation regarding scope, service owners, request approvals, workflow, and user experience. 7 Pages (50-245)

Staffing

SENIOR IT CUSTOMER SERVICE SPECIALIST 3 Pages (20-1267)

TELECOM SUPPORT ANALYST 2 Pages (20-1264)

HELP DESK MANAGER 2 Pages (20-1263)

DESKTOP SOFTWARE SUPPORT SPECIALIST 2 Pages (20-1262)

MOBILE DEVICE ADMINISTRATOR 2 Pages (20-1261)

HARDWARE SPECIALIST 2 Pages (20-1260)

HELP DESK ANALYST II 2 Pages (20-1259)

TECHNOLOGY SUPPORT ANALYST 2 Pages (20-1258)

TIER 3 SERVICE DESK TECHNICIAN 1 Page (20-1257)

TIER 1 SERVICE DESK TECHNICIAN 2 Pages (20-1256)

IT SERVICE DESK MANAGER 4 Pages (20-1255)

COMPUTER TECHNICIAN III 2 Pages (20-1214)

COMPUTER TECHNICIAN II 2 Pages (20-1213)

COMPUTER TECHNICIAN I 2 Pages (20-1212)

SERVICE DESK MANAGER 2 Pages (20-1207)

HELP DESK SUPPORT SPECIALIST I 4 Pages (20-1206)

SENIOR SERVICE DESK PROCESS IMPROVEMENT SPECIALIST 2 Pages (20-1205)

HELP DESK SPECIALIST 5 Pages (20-1077)

TECHNICAL SERVICES MANAGER 3 Pages (20-1021)

HELP DESK SUPPORT ASSOCIATE 1 Page (20-1007)

DESKSIDE SUPPORT SPECIALIST 4 Pages (20-834)

HELP DESK SPECIALIST 3 Pages (20-833)

SUPPORT ENGINEER 2 Pages (20-815)

HELP DESK / TECHNOLOGY SUPPORT ANALYST 2 Pages (20-747)

TECHNICAL ANALYST 3 Pages (20-687)

HELP DESK TECHNICIAN INTERVIEW QUESTIONS The following are questions helpful to an interviewer who is looking for a qualified Help Desk Technician. 1 Page (20-465)

SERVICE DESK LEAD 3 Pages (20-407)

SERVICE DESK ANALYST I 2 Pages (20-406)

DESKTOP / HELP DESK TECHNICIAN 4 Pages (20-395)

CLINICAL INFORMATICS SPECIALIST 4 Pages (20-394)

NETWORK ADMINISTRATOR 5 Pages (20-392)

SYSTEM ADMINISTRATOR 5 Pages (20-391)

TECHNOLOGY SUPPORT COORDINATOR 1 Page (20-390)

DESKTOP & NETWORK SUPPORT ANALYST 2 Pages (20-339)

CLIENT & INFRASTRUCTURE SERVICE MANAGER 2 Pages (20-337)

IT DESKTOP SUPPORT 2 Pages (20-152)

TECH SPECIALIST III 3 Pages (20-145)

DESKTOP SUPPORT ANALYST 2 Pages (20-144)

SENIOR IT SERVICES TECHNICIAN 3 Pages (50-414)

TIER 2 SERVICE DESK TECHNICIAN 2 Pages (50-398)

TIER 1 SERVICE DESK TECHNICIAN 2 Pages (50-397)

SERVICE DESK SPECIALIST II 2 Pages (50-261)

Ticketing & Tracking

TECHNOLOGY SLA TEMPLATE This is an example of an organization's incident ticket response and resolution targets for help desk. 1 Page (20-1144)

HELP DESK TICKET TRIAGE CHART This workflow provides an example of the possibilities involved with outage or degradation issues. 1 Page (20-624)

IT TICKET FLOW This flow chart helps to demonstrate the path that help desk and other service tickets take between the customer and the help desk or enterprise. 1 Page (20-623)

HEAT TICKET PRIORITIZATION Major, medium, and low impact classifications of incidents are described. 1 Page (20-385)

KPI DASHBOARD SAMPLES Following are two examples of KPI dashboards using Power BI for reporting along with ManageEngine's ServiceDesk Plus. 2 Pages (20-349)

SUPPORT DESK ESCALATION PROCEDURE When issues being worked by the support desk teams fall outside of the scope of what a support desk can handle, an escalation is required. 4 Pages (20-148)

SYSTEM OUTAGE ROOT CAUSE ANALYSIS The following is a chart for recording details of a service desk ticket problem and the subsequent Root Cause Analysis (RCA). 2 Pages (20-120)

IT PURCHASING CHART The following is an example of an ITAM approvals flowchart. 1 Page (50-316)

Transcripts & Polls

PRIVACY LAWS TRANSCRIPT NOREX Members discussed privacy law compliance; departments best suited to manage privacy; sources consulted to measure compliance against; developing and keeping current a Record of Processing Activities (ROPA); Privacy Impact Assessments (PIA) tools; NIST CSF core functions; Chief Privacy Officer or Chief Compliance Officer; audit frequency of IT tools to ensure privacy law compliance; leveraging internal audits to evaluate privacy programs; and US federal legislation on privacy laws. 13 Pages (NV2471)

MFA & IDENTITY ACCESS MANAGEMENT FOR ADMINISTRATORS TRANSCRIPT NOREX Members discussed the definitions of MFA, IAM, and PAM; cyber insurance requirements; MFA tools; MFA usage trends; enforcing MFA with M365; MFA for non-admins; MFA for non-service accounts; threat detection and response; automated detection tools; passwordless authentication; phishing resistant MFA; and password vault usage. 21 Pages (NV2468)

CONFERENCE ROOM TECHNOLOGY SOLUTIONS TRANSCRIPT NOREX Members discussed conference room monitoring and management strategies; staff dedicated to conference room management and troubleshooting; training capable users; tool experiences and recommendations; cost of conference room technology solutions; projectors vs TVs; moving away from complex-type rooms to Microsoft Teams rooms; Microsoft licensing; camera options; using Teams with non-Teams meetings; hybrid solutions; accommodating classroom meetings; microphone considerations; and large occupancy rooms. 25 Pages (NV2464)

GOVERNMENT: CYBERSECURITY TRANSCRIPT NOREX Members discussed significant changes to the cybersecurity program considering the current threat landscape; optimizing the organizational structure; cybersecurity priorities for leadership; AI considerations; accommodating business needs while maintaining

effective security; recommended cybersecurity tools; Microsoft tools utilized; G3 M365 licensing experiences; and security frameworks. 14 Pages (NV2463)

IT STAFF DEVELOPMENT / TRAINING TRANSCRIPT NOREX Members discussed the percentage of IT budget planned for training and development; hours / certifications required per year; measuring success of training completed; vendors or online services utilized for training; soft skill training; encouraging employees who do not want to develop; on-the-job development plans; successfully planning and allocating time for professional development; and Knowledge Skill Tree or Knowledge Map for application development or system infrastructure teams. 18 Pages (NV2461)

CLOUD PHONE SYSTEMS TRANSCRIPT NOREX Members discussed initial cost per user for a Cloud phone system vs VoIP system; Cloud phone providers and moving from a Cisco Unified Communication Manager (CUCM) VoIP system; Teams integration (8x8 vs RingCentral vs others); direct routing vs Cloud-hosted / managed; replacing an older on-prem Mitel system; Dialpad usage; issues with Teams; Operator Connect or direct routing integration with Teams; Vonage Premier unified communications with mobility; all-in-one VoIP / chat / video / mobile solutions for call routing workflows and SMS user requirements; devices on desktop vs softphones; Kari's Law and RAY BAUM'S Act compliance with regard to Cloud Phone Systems; and data ownership and PCI considerations. 23 Pages (NV2460)

PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed leadership buy-in to form an infrastructure PM team; applications in use to track project deliverables and progress; tools utilized for project management; scheduling time for projects daily and across a calendar year; pros and cons of using Microsoft Project Online; combining traditional project management methods (Waterfall) with the Agile methodology (Scrum); working with Agile Development Teams when the business is Waterfall process; platform to work with multiple IT stakeholders who use Jira and ServiceNow; and allocating time for the unexpected work driven by business needs. 18 Pages (NV2451)

HEALTHCARE INDUSTRY IT SECURITY TRANSCRIPT NOREX Members discussed when risk outweighs an operational mandate; managing comprehensive security; successful tool and processes for centralized or almost-centralized security management; state of cybersecurity infrastructure; routine tests to measure cybersecurity readiness; managing outside access requests such as VPN connections, vendor contract workers, etc.; Cloud-hosted EMRs; responding to natural disasters or other emergencies; and best practices for recruiting and retaining talent. 14 Pages (NV2447)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discussed how to distinguish the incident vs service request path; utilizing Key Performance Indicators (KPIs); challenges achieving the most important KPIs; implementing customer feedback and surveys; monitoring processes to ensure they are effective with the changing business landscape; creative use of help desk tools; and blending Agile in operations. 23 Pages (NV2442)

CHANGE MANAGEMENT TRANSCRIPT NOREX Members discussed frequency to allow changes; strategy used to define change windows; intake and prioritization of change requests; Change Advisory Board (CAB); change management toolsets; integrating automated configuration change technologies to catch unauthorized changes; tracking changes in SaaS, IaaS, or PaaS configurations; security review of changes; IT Change Management integration with overall company change management process; maturing Change Management / change enablement process; and change Management in DevOps, CI / CD, and Infrastructure as Code. 20 Pages (NV2439)

IT SERVICE MANAGEMENT TRANSCRIPT 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). 19 Pages (NV2437)

CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed percentage of annual revenue spent on IT; percentage of budget allocated to IT and cybersecurity; staffing ratios; pros / cons with

outsourcing support to a third party; dealing with consistent communication for “undesked” workers; internet access solutions for jobsites and remote locations; paperless onboarding with users not wanting an email address; fleet management software / services in use; Oculus VR headset and local administrator rights; asset label printers for barcodes / QR codes; structure and function of a Project Management Office for IT; and iPad programs. 19 Pages (NV2436)

ERP STRATEGIES TRANSCRIPT NOREX Members discussed managing ERP workload across the organization’s teams; running ERP globally; on-prem vs Cloud-hosted, single vs multi-instance, regional support vs central support teams; running multiple unique ERPs and financial considerations; implementing Electronic Data Interchange (EDI); the value of implementing an EDI solution and ERP solution; Dynamics 365 ERP accessing ERP data through the Dataverse; Asset Management features of Dynamics F&O; implementing a WMS; migrating from EBS to another ERP system; SAP ECC to SAP S/4; and keeping inventory in sync between 3PLs and the ERP. 17 Pages (NV2435)

PASSWORD MANAGEMENT TRANSCRIPT NOREX Members discussed NIST password guidelines; verifying users for password reset without using the last four of SSN or employee ID number; critical steps to be taken before rolling out a Password Management solution; enterprise, end-user password solutions (LastPass, 1Password, Keeper, and Dashlane); user adoption of an Enterprise Password Manager; Windows Hello for Business and Beyond Identity for passwordless authentication; utilizing an MFA security thumb key; requiring two-factor or multi-factor authentication; and secure backup strategy. 21 Pages (NV2434)

MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT NOREX Members discussed preventing MFA fatigue; minimizing the impact to registration of the users before enabling MFA; passwordless MFA configured through Microsoft Azure by conditional access; applying MFA for service accounts; handling MFA for admins; utilizing PAM solutions and if this will be a requirement for cyber insurance; white glove configuration of new laptops; startup difficulties to retrofit SSO into the existing environment; and adopting SSO for third-party accounts that employees frequently access. 19 Pages (NV2432)

IT ASSET MANGEMENT TRANSCRIPT NOREX Members discussed core investments for IT assets in 2023; successes in building an asset management program; resource levels dedicated to ITAM practices; key measures to tracking assets; foundational pieces needed before IT asset management is useful; successful ITAM tools; tracking software assets vs hardware assets; lessons learned implementing a software asset management solution; factors considered for on-prem vs Cloud-based software asset management solutions; experience with doing a formal software asset management process maturity assessment; managing endpoints for a 100% remote workforce; managing assets that do not have an agent installed; and pros / cons to a Managed Security Service. 24 Pages (NV2430)

SERVICENOW TRANSCRIPT NOREX Members discussed the reasons to select ServiceNow and moving from other toolsets; pros / cons with implementing ServiceNow; utilizing customizations within ServiceNow and experiences with customizations during system upgrades; time to implement ServiceNow; staffing model for management; end user experience via mobile usage; Configuration Management Database; Teams integration and deploying the catalog / portal to the Teams client; Employee Center; integrating ServiceNow with work-tracking systems like Azure DevOps; Software Asset Management module; ServiceNow Discovery tools; metrics to measure customer experience; and Project Management module. 28 Pages (NV2429)

EDUCATION IT ISSUES TRANSCRIPT NOREX Members discussed lessons learned while managing a school population that suddenly went remote; remote management tools used to patch and support checked-out equipment; changes in IT staffing needs when changing from on-prem to remote; downsizing Zoom licensing with the move back to mostly in-person classes; implementing Class for Zoom; applications used to manage phones and tablets coming onto campus; applications used to manage and push data to students’ tablets; helpful and / or required security certificates; Moodle LMS and other vendors such as Canvas and D2L; airSlate / signNow over DocuSign and PandaDoc; and partnering with Coursera. 12 Pages (NV2426)

MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed the top three business-facing projects initiated this year, metrics used to measure the performance of IT, improving IT vs the manufacturing lifecycle, the work environment for IT workers, Microsoft Compliance Manager for O365,

introducing user profiles, dealing with passwords, determining support group when issues could be IT or OT, segmenting BT / IT and OT Networks, barcode scanners in a HighJump environment, solutions to track employees and visitors in facilities for emergencies, and CMMS / EAM solutions. 21 Pages (NV2421)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed driving system utilization to improve operational efficiencies, effect of technology deployment on staff and workflows, leveraging Cloud technology, Cloud-hosted for EMRs, separate EMRs for hospitals and clinics, single-patient portals for health information in one app, leveraging APIs, recommended healthcare apps, PMO / SDLC strategies, dedicated project managers, data analytics programs, and managing comprehensive security. 24 Pages (NV2415)

ENERGY / UTILITY INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed IT budget trends, applications used to track compliance requirements, tools to analyze historical meter and weather data to determine the performance of behind-the-meter load control programs, leveraging collaboration tools (MS Teams / Slack) to work with 3rd parties, vendor partners, or stakeholders, use of MS Sentinel as both a SIEM and a SOAR, network tap monitoring tools like CyberX and Darktrace, Identity and Access Management initiatives, maintaining utility-owned communications equipment, partnering with outside Incident Response Services, and capabilities in the area of RPA / Automation. 22 Pages (NV2412)

TALENT RECRUITMENT / MANAGEMENT / RETENTION TRANSCRIPT NOREX Members discussed top-shelf benefits today's IT candidates expect, strategies implemented to retain current talent, challenges with pushing IT employees to return to the office, available hybrid / work-from-home / in-office options, creating bonus programs, targeting and hiring talent that is a cultural fit and has the required skill set, measuring technical knowledge vs what is listed on a resume, questions candidates ask about the hiring organization, promoting employee engagement, and creating a team atmosphere when many employees continue to work remotely. 18 Pages (NV2411)

RUSSIA-UKRAINE IMPACT ON CYBERSECURITY TRANSCRIPT NOREX Members discussed trusting the resiliency of government and infrastructure security, increase in security metrics due to the war, measuring the risk impact of this event, determining dependencies and risks with overseas vendors, important steps of system hardening, email security vendors, utilizing threat intelligence effectively, preparing executives for worst-case scenarios, Honeypot as a security measure, supply chain attacks, securing Operational Technology environments, and the evaluation and address of risks from ransomware. 22 Pages (NV2410)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discussed outsourcing vs insourcing the Service Desk function, IT Service Providers, tracking and reporting key metrics / KPIs, response and resolution targets for Incident Ticket severity levels, the role of the individual answering incoming calls to the Help Desk, the structure of the Help Desk team, best practices for SLAs on Level 2 & Level 3 service requests, dealing with inappropriate escalations, Tier 1 staff engagement, training and professional development, VDI, and Self-Service. 32 Pages (NV2407)

CLOUD PHONE SYSTEMS TRANSCRIPT NOREX Members discussed when it makes most sense to invest in a Cloud-based phone system, caveats to Cloud phones, implementing a Cloud phone system in the workplace, call center performance in the Cloud, handling contact center outages, using Microsoft Teams as a Cloud phone system, 8x8 offerings, combining Zoom telephony with Teams, call recording capabilities, moving Cisco Call Manager to the Cloud, and Vonage Mobility for desk phones and call forwarding. 28 Pages (NV2406)

IAM: MANAGING IDENTITIES & PROVISIONING TRANSCRIPT NOREX Members discussed lessons learned from implementing an IAM solution, the source of truth for employee information and identity, tools used on MFA privileged accounts, tools for account provisioning for Active Directory / Hybrid 365, IAM tools in use to manage user accounts, staff resources devoted to IAM, and Access Reviews / Certifications. 16 Pages (NV2405)

SECURITY INITIATIVES FOR 2022 TRANSCRIPT NOREX Members discussed the percentage of the IT budget directed to InfoSec, cyber insurance, top 3 security initiatives, implementing a governance framework for accepting risk, GRC tools, best practices to apply security patches on Windows OS, automating /

outsourcing cybersecurity processes, MDR services and pen testing, successful tools to protect from malicious web links and sites, VPN requirements, EDR / AI scanners, security strategies, and providing security dashboards to company officers. 28 Pages (NV2401)

MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT NOREX Members discussed struggles setting up users with MFA, conditional access policies, minimizing the impact to registration of the users before enabling 2FA / MFA, experiences implementing Duo 2FA, passwordless MFA configured through Microsoft Azure, integrating with Remote Desktop Connection to servers and / or Terminal Server, MFA products for remote access to network (VPN / RDP) and local login, adopting Single Sign-On for 3rd-party accounts, and pain points with implementing OKTA for MFA and SSO. 19 Pages (NV2396)

FOOD & BEVERAGE MANUFACTURING: IT SECURITY TRANSCRIPT NOREX Members discussed recommended IT Security initiatives, cybersecurity insurance and renewals, segregation of the IT network, communication to the outside world from the OT network, solutions used for 2FA on VPN connections, Artic Wolf, Red Canary, and documented recovery and response plans. 15 Pages (NV2386)

POST-COVID HYBRID WORK STRATEGIES TRANSCRIPT NOREX Members discussed how best to manage a hybrid work environment, provisions for home offices, hardware support and budget, internet connectivity issues, cash allowances and potential legal concerns, achieving equity amongst in-office and at-home staff, best tools for building out conference rooms, and security. 30 Pages (NV2385)

POWER BI TRANSCRIPT NOREX Members discussed getting started with Power BI, experiences with building and executing, visualization services, mining capabilities, dashboard viewing, licensing agreements, backup and recovery strategies, deliverables, and alternative products. 15 Pages (NV2383)

RANSOMWARE TRANSCRIPT NOREX Members discussed Ransomware attacks and what to do once infected, restoring LAN shares and rebuilding workstations, warnings against paying ransom, counter measures and mitigation, backups and patching, cybercriminal activity detection, MDR vs. MSSP, endpoint protection, and the use of an MDM application. 30 Pages (NV2381)

IT ASSET MANAGEMENT TRANSCRIPT NOREX Members discussed tracking assets and industry standard metrics, foundation pieces needed before ITAM is useful, assets tracked, software being used for asset management, IT asset management tools, and Block 64. 25 Pages (NV2380)

CONSTRUCTION INDUSTRY: IT PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed how best to elevate the presence of IT project management in the Construction Industry, community of practice standardization, master service integrators, Construction Management software, credential harvesting, and security. 14 Pages (NV2375)

SECURITY FRAMEWORKS TRANSCRIPT NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discussed the organization and approach to help desk / service desk and its structure, self-help options for end-users, outsourcing, and the collection of metrics. 19 Pages (NV2372)

GLOBAL IT ISSUES TRANSCRIPT NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams,

the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

INCIDENT & PROBLEM MANAGEMENT TRANSCRIPT Member organizations discuss both incident and problem management best practices, tools, lessons learned, and more during this April, 2021 session. Chat comments and polls are included. 24 Pages (NV2364)

IT CHANGE MANAGEMENT TRANSCRIPT NOREX members discuss IT Change Management processes including recommended tools, governance approaches and communication protocols during this April 2021 session. 25 Pages (NV2363)

TELECOM / VOIP / TEAMS PHONE SYSTEMS TRANSCRIPT A great March, 2021 discussion on telecom trends. Strategies and experiences moving to Teams (and others) for voice; softphones comparison; VoIP enhancements; and more. This transcript includes several polls and a lively chat session. 32 Pages (NV2361)

SECURITY INITIATIVES FOR 2021 TRANSCRIPT NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

CONFIGURATION MANAGEMENT TRANSCRIPT From getting started, tools and training, and how to avoid CMDB project mistakes, member organizations discuss Configuration Management during this December 2020 session. 19 Pages (NV2349)

PLANNING FOR 2021 TRANSCRIPT NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 Session. 20 Pages (NV2339)

CYBERSECURITY TRANSCRIPT NOREX Members share cybersecurity best practices and tool recommendations during this July 2020 Session. 19 Pages (NV2331)

SERVICENOW TRANSCRIPT NOREX Members currently using or evaluating ServiceNow discuss justification, ROI, implementation, SLA best practice, and specific functionality during this June 2020 session. 20 Pages (NV2327)

ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 Session. 20 Pages (NV2323)

HELP DESK / SERVICE DESK TRANSCRIPT Recent moves of entire workforces home has put a great deal of pressure on the Help Desks/Service Desks within companies. During this Session, NOREX members discuss the challenges and successes of those moves and the move back, metrics and how they are evolving and tools and training that members are using to service their organizations. This transcript includes a large discussion around tools, help desk to employee ratios and a robust chat log conversation. 33 Pages (NV2318)

COVID-19 PANDEMIC: RESPONSE, LESSONS LEARNED, WHAT'S NEXT? TRANSCRIPT Members discuss how the organization has responded to the impact to the pandemic crisis. Lessons learned on supporting WFH from a technical, hardware, security and team engagement / collaboration, and what is next perspective are shared. Polls, links, and a lively chat section are included in this April, 2020 transcript. 28 Pages (NV2315)

EMPLOYEE ONBOARD / OFFBOARD IT ISSUES TRANSCRIPT What is the corporate lead time to setup new accounts? Who is responsible for opening onboarding tickets; training; off boarding best practices and the

solutions / tools to assist with automation are included in this discussion. Polls, a lively chat and BYOD / MDM best practices are included in this March 2020 transcript. 30 Pages (NV2309)

WINDOWS 7 TO 10 UPGRADE TRANSCRIPT NOREX Members discuss experiences and recommendations for the move from Windows 7 to Windows 10 during this November 2019 Session. 14 Pages (NV2300)

INCIDENT MANAGEMENT TRANSCRIPT NOREX Members dedicate this November 2019 session to the processes, tools, best practices and general experiences with incident management. 15 Pages (NV2299)

PATCH MANAGEMENT TRANSCRIPT NOREX Members share their patching schedules for routine and critical system patching and discuss tools used for applying patches during this November 2019 Session. 15 Pages (NV2298)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discuss Help Desk / Service Desk procedures and recommended tracking tools during this November 2019 Session. 14 Pages (NV2296)

IT ASSET MANAGEMENT (ITAM) TRANSCRIPT NOREX members discuss IT asset management strategies, implementation and tools and during this October 2019 session. 21 Pages (NV2294)

DOCUMENT MANAGEMENT TRANSCRIPT NOREX members share experiences selecting, implementing and managing Document Management systems during this September 2019 Session. 18 Pages (NV2286)

MULTI-FACTOR AUTHENTICATION AND SINGLE SIGN-ON TRANSCRIPT NOREX members share recommendations for the adoption of MFA and SSO processes and tools during this August 2019 Session. 22 Pages (NV2285)

PRIVILEGED ACCESS MANAGEMENT TRANSCRIPT NOREX members discuss the implementation and of Privileged Access Management procedures and tools during this July 2019 Session. 14 Pages (NV2278)

O365 NEW FEATURES / INITIATIVES TRANSCRIPT Members share experiences with the implementation of various Microsoft Office 365 services and features including PowerBI, SharePoint, Skype for Business and Teams during this June 2019 Session. 32 Pages (NV2275)

NETWORK PERFORMANCE AND CAPACITY PLANNING TRANSCRIPT Members discuss strategies for improving network performance with an emphasis on proprietary and open source monitoring tools during this April 2019 Session. 21 Pages (NV2265)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX members discuss IT Help Desk procedures and tools during this March 2019 Session. 21 Pages (NV2262)

SELECT: IT SERVICE MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed substantial changes to ITSM processes and tools; integrating Jira and ServiceNow; importing old data or doing a clean install for a new tool; Cloud-based printing solutions; and when to implement CMDB. 13 Pages (NS244)

SELECT: SECURITY INCIDENT RESPONSE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing an incident response plan; incident communication tips; tabletop exercise recommendations; usage of an incident response service provider; business continuity tool recommendations; post-breach activity; third-party security monitoring; and incident response playbooks. 13 Pages (NS243)

SELECT: APPLICATION MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing a business application catalog; the use of ServiceNow; application tracking and data synchronization; automating processes; user education on the latest apps, tools, and features available for use; identifying a source of truth; asset management; and outsourcing asset management. 11 Pages (NS242)

SELECT: IT GOVERNANCE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed initiating a governance process; the scope of IT Governance; defining IT Governance; decision makers and how decisions are made; establishing governance standards; IT Governance tools; Change Management considerations; maintaining process; and dealing with a less-rigid planning cycle. 13 Pages (NS238)

SELECT: SERVICENOW TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed achieving primary value drivers for a ServiceNow implementation, organization structure, implementation timelines, SAM Pro module, managing services in SNOW, ServiceNow enabling other IT capabilities and systems such as CMDB, and CAB workbench to run a CAB meeting. 18 Pages (NS213)

IT TRENDS 2023 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 36 Pages (DT2023-2)

IT TRENDS 2023 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 45 Pages (DT2023-1)

IT TRENDS 2022 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2022-4)

IT TRENDS 2022 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2022-3)

IT TRENDS 2022 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 43 Pages (DT2022-2)

IT TRENDS: 2022 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2022-1)

IT TRENDS: 2021 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2021-4)

IT TRENDS: 2021 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 59 Pages (DT2021-3)

IT TRENDS: 2021 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 56 Pages (DT2021-2)

IT TRENDS: 2021 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2021-1)

IT TRENDS: 2020 Q3 & Q4 IT Trends is a collection of the NOREX Member input captured in the third and fourth quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 74 Pages (DT2020-2)

IT TRENDS: 2020 Q1 & Q2 IT Trends is a collection of the NOREX Member input captured in the first and second quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 62 Pages (DT2020-1)

CIO: ALIGNING BUSINESS & TECHNOLOGY PLANNING TRANSCRIPT NOREX Members discussed stakeholder involvement in planning; usage of a steering committee; technology roadmap tools; capability mapping; consultant involvement; organizational considerations; business-led ERP implementation; steps to achieve IT objectives; digital transformation and ChatGPT usage; cyber training for leadership; retaining staff; and transferring IT leadership. 17 Pages (CV083)

CIO: IT DEPARTMENT KPIs TRANSCRIPT NOREX Members discussed metrics shared with Executive Leadership to show IT department's value, common KPIs tracked, performance-level KPIs tracked other than MTTA and MTTR, creating a balanced scorecard for infrastructure, help desk and application development, total tickets vs open tickets, measuring customer satisfaction rates, KPIs and data interpretations of security-related issues, key performance indicators to monitor with Managed Security Service Providers, monitoring the effectiveness of patching program, IT ROI, IT expenses, and identifying your cost breakdown. 26 Pages (CV080)

CIO: IT BUDGETING & PLANNING FOR 2022 TRANSCRIPT NOREX Members discussed projecting vendor price increases, cybersecurity goals aligning with legal and cyber insurance needs, percentage of IT budget to overall budget, success stories to acquire more funding and staff, the cost to move to the Cloud, software, infrastructure, and platforms when moving to the Cloud, leveraging ARPA funding in 2022, mid-year reviews to analyze spending, determining the optimal size for an IT organization, critical-success criteria, and measuring productivity of software developers in an Agile Scrum environment. 24 Pages (CV078)

CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

CIO: REMOTE WORKFORCE / WORK-FROM-HOME TRANSCRIPT The benefits and concerns of supporting a remote workforce and a work-from-home program are a hot topic for IT executives. In December 2019, NOREX members discuss experiences, recommendations, policy, tools to support, and general consideration when offering employee remote workforce / WFH programs. 26 Pages (CV073)

CIO IT TRANSFORMATION TRANSCRIPT This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)