



## Smart Guide: to selecting your next service desk solution



Practical advice for organisations preparing to select a service desk solution that will best suit their unique requirements.



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## 1. WHERE TO START

‘Pressure, pushing down on me, pressing down on you, no man ask for’ - the opening lyrics of the Queen song ‘Under Pressure’ could be the IT Manager’s anthem. Even when times are good, it’s challenging enough to improve service quality, increase customer satisfaction and demonstrate IT value. But it’s much more difficult when IT budgets, staffing and overall resources are ‘under pressure’.

The economic climate is unlikely to improve dramatically any time soon, so it’s critical to identify the areas where your service desk solution can deliver maximum benefit to your customers and the business.

This guide offers practical advice to organisations actively reviewing their service management function and preparing to make a decision on which service desk software will best suit their requirements.

Managers need to ensure the metrics they choose to collect and report provide an accurate picture of the performance of the service desk, are action oriented, and encourage the right behaviour.

### Build your business case on a solid foundation

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Purchasing or upgrading your service desk software is a strategic decision, and one which should only be made once you have identified the specific service and support requirements for your organisation. Before embarking on the selection process, it is important to be clear about what outcomes you are looking to achieve with the new tool.

An ‘elevator pitch’ that answers the following questions is a great starting point:

- What are your greatest areas of pain?
- What challenges are you trying to solve?
- What is the impact of not solving those challenges?

Once you have answers to the above questions, you will be in a position to set objectives and scope initial requirements before exploring the market.

### Understand your customer’s perspective

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Customers will form a perception of service quality based on what’s visible to them. This is often referred to as ‘the line of visibility’. If the front office provides a good service experience and meets expectations, the customer isn’t concerned about what happens behind the scenes.

Because the service desk is the area of IT that is most visible to the customer, an effective service desk will enhance the business’s perception of the quality and value of IT services. Conversely, the reputation of the entire IT organisation can be damaged by an ineffective service desk. It’s vital we get this right by understanding the customer’s experience.



## Concentrate on service and value to customers

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When you are seeking approval to buy a new tool, remember that the business is mainly interested in two things: what will this cost and what can we expect in return?

Instead of talking about technical benefits, tell them about the value your customers will derive from the new tool as a result of having easier and faster ways to resolve everyday issues - for example through self-service and knowledge bases. These features also reduce service desk workload and leave trained analysts to focus on more complex incidents.

## Upgrade or replace?

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If service is not as it should be, IT organisations can be too quick to point the finger of blame at their current tool. In some cases, the software may be more than capable, but perhaps needs to be upgraded to the latest version, or requires customising to address your requirements.

That said, it is a mistake to assume that upgrading your current tool will always be a less expensive and disruptive option than replacing it. Faced with losing business, the incumbent vendor may offer heavy discounts, or even free software, to tempt you to stick with them. Beware the cost of free.

Before you decide to stick with what you have, weigh up your relationship with the vendor. Have they been unsupportive in the past, made promises they didn't keep, or paid you less attention after they had your money? If so, what will be different this time round?

If you decide to search for a new tool, by all means give your current vendor the opportunity to show you their latest offering. But if you have less than 100% confidence in the partnership, perhaps it's time to see what the rest of the market has to offer as well.

## The service management vendor landscape

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With roughly 200 vendors selling help desk and service desk tools, and around 70 vendors active in the mid-market and enterprise space, selecting the right tool for your organisation is no easy task. The choice is staggering, from basic ticketing systems to full ITSM suites. There are also multiple deployment models and licensing options to choose from.

Depending on the scope of your initial requirements and level of ITSM maturity, components such as service portfolio, financial management, service catalog, configuration management and event management should be considered.

Whether you're looking at basic or more comprehensive service desk functionality, it's vital to understand the scope of your requirements before actively investigating the options available. That way, you will be better positioned to select a tool that meets your service, infrastructure and financial needs.

## 2. AVOID THE 5 MOST COMMON PITFALLS

The same mistakes recur time and again when companies are evaluating ITSM tools and vendors, but they are easy to anticipate and avoid.

### 1 Neglecting opinions of experts and peers

IT groups often form opinions based on vendor information, and particularly product demonstrations. The demonstration is a crucial part of the selection process, but jumping straight in at the demonstration stage often results in a requirements list that highlights your favourite features from multiple products. It pays to do your homework first, by listing the main challenges the tool should help you to overcome, and then using readily available resources to identify products and vendors that may be suitable.

Analyst groups, such as Gartner, Forrester, Ovum and InfoTech, are heavily engaged with the ITSM market, and you may find it useful to speak with their analysts, as well as read their research. Other resources, such as PinkVERIFY™ from Pink Elephant, lists vendors in terms of compatibility with ITIL® processes. (It may be best to select just a few of these processes to begin with, however, as we suggest below.)

If you're a member of industry groups such as HDI, SDI and itSMF, then ask other members for their opinions of the tools you are considering. Remember, too, that many customers are more than willing to share their real-life product experiences on social networks such as LinkedIn groups. Be aware, though, that many vendors and resellers monitor these channels, so responses to your posts may come from those with a vested interest.

'Crowdsourcing' lists can also provide valuable insight without attracting attention from vendor sales staff. One popular crowdsourced list<sup>1</sup> is described as 'The 1st & most visible ITSM / ITIL® tools List, Crowdsourcing your FAVORITES'. Participants vote on the tools they like and dislike, with practitioners adding comments about their experiences.

Although all these resources are useful for research purposes and may prompt questions to ask the vendors, they cannot, of course, guarantee that any tool will be the perfect fit for your particular environment.

### 2 Focusing on frameworks

Many organisations selecting a service desk put 'must support the ITIL® framework' at the top of their list of requirements. Although this is likely to be a major consideration, it is a big mistake to make it your primary one.

The global wave in adoption has driven vendors to produce ITIL® 'compatible' solutions and as a result, most commercial tools support the framework. However, frameworks contain no magic, and won't change your culture overnight. They simply offer guidance.

Support for a framework is no guarantee that the software will improve service quality or deliver value to customers. In fact, it may have the opposite effect by placing too much emphasis on IT process adoption and drawing attention away from the customer experience and the issues that impact the business, which should always be your first concern.

Remember, service management is all about delivering outcomes for customers and value to the business. Establishing this emphasis at the outset allows you to tackle the processes that offer the greatest benefit and ensures that adoption follows the ITIL mantra - 'Adopt, Adapt, Improve' - for identifying, collecting and presenting metrics.

<sup>1</sup> ServiceSphere ITSM Tools List - <http://list.ly/list/CD-itsm-tools>

### 3 Allowing technical bias

Although you're purchasing software, it's a mistake to put technical staff in charge of steering requirements documents. Architecture is an important consideration, but features that drive customer satisfaction, improved communication and service desk productivity should be prioritised over the 'shiny' features that may attract technical staff.

Buyers should not, in any case, let themselves be swayed by just one feature or option - whether it's on the technical or business side - or by the look and feel of a particular product. Once you see the whole picture and understand the options available, you will be better positioned to select a tool that meets all your requirements.

### 4 Overstating initial objectives

Successfully implementing a tool does not signal the end of your journey - it is the start. That's one reason it is important to avoid overstating your initial objectives and to be realistic about what you can achieve within reasonable timeframes.

If you can show that you delivered the returns you initially stated, you can dramatically improve your chance of getting the ongoing management support and funding you need for subsequent phases. Establishing your baseline by capturing metrics, before and after implementation, can provide evidence of improvement.

### 5 Not addressing the 4Ps

The 4Ps (People, Processes, Products and Partners) are the components we must get right in order to achieve better ITSM performance. These elements, explained in the panels, must all be addressed and built into your business case.

#### People

It's no coincidence that we have put 'people' first. Although processes, products and partners are important, it's people who play the most vital role in delivering service. People establish the culture, identify the issues, and propose the opportunities for service improvement.

Decades of experience working with customers and implementing ITSM tools have taught us that a focus on people is vital to success. At Hornbill, we stress this importance by highlighting stories and videos from successful and award-winning customers - the People who Make IT Happen<sup>2</sup>.

Even if your organisation is lucky enough to have the right people, the chances are you don't have enough of them, and it's tough to get approval for more staff. Executives like to say that people are their greatest asset, but for most businesses they also represent the greatest cost. In tough times, the business has to be convinced that existing resources are operating at maximum efficiency and capacity before they will consider an increase in staffing.

To address the 'people' element, your business case must therefore show how you can both improve the service experience for customers and reduce the load on IT resources.

<sup>2</sup> Let's Make IT happen (videos) - <http://www.youtube.com/user/HornbillVideo>

## Processes

Without effective processes, chaos reigns, and it's almost impossible to establish a baseline for improvement. However, too much emphasis on processes can result in lack of responsiveness. Worse still, if a process isn't aligned with the overall objectives of the business, it will fail to deliver value. Running a business well therefore means finding the right balance.

IT organisations are now learning about how to achieve this type of process optimisation from other industries such as manufacturing. A key concept is Lean - an approach that creates more value for customers, using fewer resources by eliminating waste.

It is important to be realistic about which processes your new solution can address in the first instance. Current ITSM best practice frameworks offer guidance on integration of business and IT strategy. However, only a small number of IT organisations have sufficient levels of ITSM maturity - or sufficient resources - to adopt the more strategic ITSM processes, such as service portfolio management. The operational processes certainly deliver value to IT, but ITSM professionals frequently struggle to translate these improvements into value that can be articulated in business terms. A comprehensive Configuration Management Database (CMDB) might be desirable, but is the IT organisation culturally ready to adopt one, and more importantly, will it deliver tangible business value?

## Products

The selection process will naturally focus on requirements for the service desk tool, but it's wise to ensure that enough attention is paid to other products and applications used within your organisation. Requirements documents often specify 'the tool must integrate with...' but fail to explain what is meant by 'integration'. Be specific about what 'integration' means, as this will help vendors understand how well their tool meets your requirements from the outset.

The tool selection process should cover requirements around 'products', but the other pillars of ITSM require just as much attention.

To secure management backing, your business case should target the processes that matter most to your customers, balancing the cost and effort expended against the expected business benefits.

## Partners

It's important to recognise that you're not simply purchasing a tool, but investing in a relationship with the supplier. A reliable partner will take a stake in your success and ensure you are getting the most from your investment. Requirements documents typically ask for information to assess vendor viability (business tenure, financials, geographical coverage, development roadmap) and proof of successful implementations. Although this provides insight, don't expect the vendor to highlight weakness, or mention unsatisfied customers.

The ultimate measure of vendor success is their customer retention rate: a high rate provides worthwhile assurance of a quality service. Other signs that the vendor will provide value include a thorough understanding of market trends, and participation in activities that further the cause of the ITSM community.

Engaging early with the vendors (perhaps before your formal selection process begins) will enable you to form some initial impressions. Do they jump straight into selling product, or do they really make the effort to understand your business and the challenges you are facing? Remember that you should also be seeking independent validation of the vendor's reputation and claims by listening to the opinions of experts and peers, as discussed above.

### 3. ESSENTIAL CONSIDERATIONS WHEN SELECTING A SERVICE DESK TOOL

We have already listed some general principles that should position you to select the right service desk tool: one that enables you to improve customer satisfaction and service quality - both actual and perceived. We'll now discuss some of the essential considerations when selecting a service desk tool.

#### Cost

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Your shopping list may contain some great tools, but can you afford them? The cost of the software itself may only be the tip of the iceberg. You'll need to factor in other costs such as implementation, training, maintenance, administration resources, hardware and other software (if you've opted for an on-premise solution).

Vendors who only sell Software as a Service (SaaS) products sometimes make sweeping claims about the cost of ongoing administration and upgrades. The truth is that not all tools are the same. Even if it's on-premise, modern service desk software shouldn't need an army of internal resources dedicated to maintaining your solution.

Whether you choose a SaaS, hosted or on-premise, it pays to examine the total cost of ownership over the life of the solution. It's also important to have the flexibility to switch between deployment models without compromise, as we discuss below.

#### Time to implement

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Service desk solutions have changed radically in just a few years. With the exception of some legacy tools, many vendors can have you up and running with the most commonly adopted ITSM processes (incident management, problem management, change management and service level management) in a matter of weeks, if not days.

If the vendor is estimating several weeks or months to implement, either your processes are incredibly complex, or the tool requires significant effort to configure. If it's the latter, alarm bells should ring.

#### Ease of configuration

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Conventional wisdom suggests that you need to have your processes defined before selecting a tool. Although there's merit in this advice, few IT groups define all their processes in advance of selecting a tool. Even if they have, as the service improvement programme evolves, these processes will need to adapt to accommodate increasing levels of ITSM maturity.

Most tools are supplied with at least basic processes 'out of the box'. Where possible, make use of them, but also look for options to grow your use of the tool as your ITSM maturity develops. The configurability of most modern ITSM tools means that you should be able to adapt processes without the need for development resources.

#### Ease of use

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Although it may appear obvious, many IT groups get suckered into buying a solution, only to discover that the reality of using the tool doesn't quite match up to the slick demonstration. Examine case studies and testimonials from existing customers. Do they refer to ease of use?

The best possible test is a pilot or evaluation of the software by stakeholders who will use the solution on a day-to-day basis. If service desk staff and customers are happy that the interface is familiar and easy to use, it is far more likely to be adopted across the enterprise.

#### Modular versus 'all you can eat'

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Modular tools enable you to deploy what you need right now, adding extra components as you need them. However, you should investigate the cost, time and effort required to add subsequent modules in the future.

Other solutions offer an 'all you can eat' approach, with all modules bundled within the cost of the software. Although this model is attractive, it is important not to try to implement too much too soon, and also to appreciate that you may incur further costs when you want to put additional modules into production - for example, you may need to engage professional services.



## Flexible licensing

Be sure that you understand licensing options - which may be complex - and that you are comparing like with like.

Fixed or named licences are normally dedicated to specific users and are suitable for personnel who are permanently logged into the application, such as service desk staff. Concurrent or floating licences offer increased flexibility: when users log out, licences are made available to other users.

## Strength of reporting

Possibly the greatest complaint about service desk tools - and the most common reason for replacing them - is weak reporting and dashboards. It's easy to assume that pre-packaged reports will satisfy your requirements, but often, that isn't the case.

Service improvement hinges on effective and comprehensive reporting, so you need to be certain that the new tool offers this capability. Look for flexibility and automation to reduce the effort required to produce and distribute reports.

Dashboards, too, can be extremely effective in communicating ITSM performance and highlighting areas for improvement, but it's important to ensure that the tool has substance behind pretty graphs. For example, can multiple measures (SLA performance, customer satisfaction, call volumes) be collated and presented by a simple graphic? Can one dashboard contain multiple graphs to communicate overall ITSM performance?

## Service and customer centricity

IT groups' Achilles heel is a tendency to emphasise technology and IT benefits at the expense of customer needs and the service experience. An ITSM tool should counteract this tendency by providing features that make it easier to see the service from the customer's perspective.

The service a customer needs and demands will vary according to role, activities performed, their length of service with the business, comfort with technology, and prior interactions with the service desk. The tool should provide service desk staff with information about an individual customer's profile, so that they can tailor the service experience according to the customer's needs and the business's priorities.

## Self-service and customer communication

Self-service offers the potential to reduce demand on the service desk and customers benefit by having another channel to access information and resolve simple issues. The benefits are clear, yet IT often struggles to convince customers to adopt self-service.

Customers are far more likely to see the benefits of helping themselves when self-service is engaging. Consider involving representatives from your customer community in the evaluation or pilot phase if self-service is on your requirements list.

## Choice of deployment models

Will SaaS, a hosted model, or on-premise implementation offer the best fit for your environment? SaaS can look appealing, as responsibility for maintaining the environment and carrying out upgrades falls to the vendor, and upfront costs are typically lower compared with an on-premise solution. However, over the life of the software, SaaS is often the more expensive option, so ensure you are not being tied into a lengthy contract.

A hosted solution can offer many of the benefits of SaaS, as the supplier provides and maintains the infrastructure, but the application itself is under your control. Hosted solutions are typically offered with subscription licences, so, as with SaaS, there will be a tipping point where it costs more than purchasing the software outright.

Some industries, such as the financial and pharmaceuticals sectors, may favour an on-premise solution to support regulatory compliance and demonstrate additional control and governance of the environment.

If a vendor offers a choice of deployment models, make sure they're offering the same software and platform across all deployment models. A few vendors offer even greater flexibility, allowing you to switch between deployment models. Although you're unlikely to change frequently between one deployment model and the next, it can be useful to have this flexibility if business or budget pressures dictate the need for change.

## 4. THE SELECTION PROCESS

Selecting a tool in haste, or with the wrong criteria in mind, can be a costly mistake - one which you may have to live with for years. Put the time and effort in up front, focus on service improvement and customer benefit, and the rewards will be well worth it.

The trouble is that the pressures of supporting modern businesses and the demand for increased agility make time an especially precious commodity in IT. There is therefore a risk that frustration will drive the selection process. Be on your guard if you hear others (or even yourself) saying things like 'Anything would be better than our current service desk tool' or 'A tool from one of the top four vendors is bound to suit'.

Choosing the tool is critical to success, but choosing the right partner perhaps even more so. During the selection process, reflect on the vendor organisations. Ask yourself questions like those on the checklist below.

### Vendor focus and capabilities:

- Does this vendor understand our immediate challenges?
- Are they focused on solving our problems (as opposed to selling their technology)?
- Are they encouraging us to improve service rather than just adopt processes?
- Have they proposed other ideas around service improvement?
- Are they taking responsibility for the success of our implementation?
- Can they get us from where we are now to where we want to be?

### Pricing:

- Is their pricing fair and transparent (no hidden costs)?
- Have they offered to help with cost justification?

### Credentials:

- Does the vendor have a good industry reputation (analysts, membership organisations, practitioners)?
- Does the vendor hold any awards for products and/or services?
- Do their customers hold awards for service?
- Is the vendor contributing to their community, over and above their standard products and services?

### Future-proofing:

- Is there a clear development roadmap and can we influence it?
- Is the vendor in tune with current developments in the industry?
- Can we see ourselves partnering with this vendor for the next five years?

If after talking to a given vendor you can answer 'yes' to most of these questions, that vendor warrants a place on your shortlist. If their service desk software also addresses your requirements, you are likely to have found the right product and the right partner.

## 5. WHY CONSIDER HORNBILL'S SUPPORTWORKS?

Hornbill provides a range of highly adaptable Service Desk applications that automate service management processes to meet the needs of your business.

The highly configurable, rapidly implemented Supportworks incorporates an intuitive user interface with Human Touch features to ensure you can deliver an improved quality of service with minimal consultancy.

### Multiple service desks, one technology

The underlying technology, Supportworks Enterprise Support Platform (ESP), underpins all Hornbill solutions and provides common service management features such as call/request management, service level management, service catalogue, web self-service, reporting, email and messaging, social media integration, knowledge management, transaction management, resource scheduling and calendaring. Supportworks ESP offers a common platform that can be used to consolidate service desks for multiple business areas, such as IT, HR, facilities and customer complaints.

Supportworks solutions are designed to match customer needs and different levels of ITSM maturity. Hornbill's flagship solution, Supportworks ITSM Enterprise, is an ITIL-compatible application (PinkVERIFY™ certified) that includes 10 ITSM processes out-of-the-box.

### Choice without compromise - have IT your way

Hornbill customers have the freedom to choose the deployment model that best serves their business: Supportworks applications can be deployed on-premise, hosted, or provided as a cloud-based SaaS solution using myservicedesk.com.

Hornbill offers customers flexibility and choice, with the ability to migrate between solutions whilst retaining the value of licences already purchased.

### Flexible, all-inclusive licensing

Concurrent and named licences offer maximum flexibility with access to all ITSM processes. Our flexible licensing and deployment options offer freedom of choice to suit any environment and budget. The optional Supportworks Self-Service module includes unlimited user licences.

### The Human Touch: putting people at the heart of service management

When customer service and service desk staff understand the needs of their customers and can correctly prioritise their requests, the foundation is laid for the provision of first-class service.

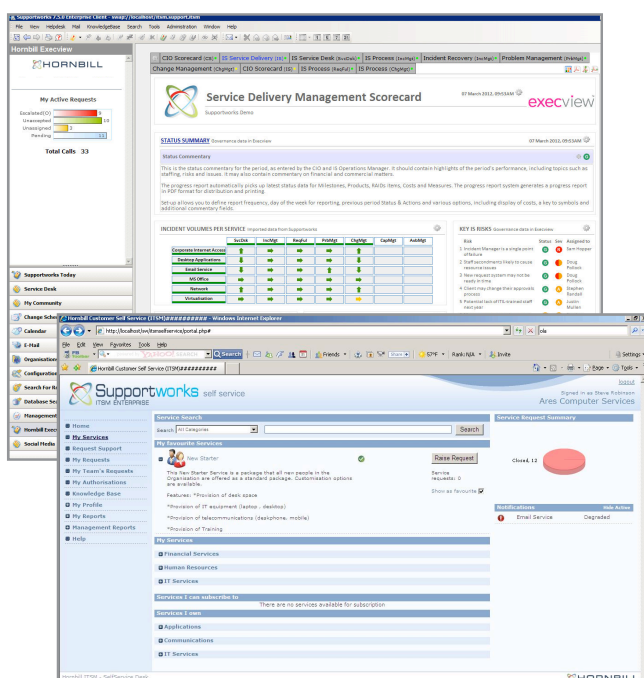
Supportworks and myservicedesk.com place the customer at the heart of every request. Each Supportworks service desk is designed with the purpose of enabling staff to provide their customers with the best possible service experience.

### Comprehensive reporting

Execview is a new IT Performance Management solution that complements Hornbill's Supportworks ITSM and business service desks. Execview gives you the key metrics you need to measure ITSM performance, presented in a straightforward form that makes sense to executives and drives action where necessary. Supportworks plus Execview is the fastest and most user-friendly way to get the metrics you need in order to understand and improve performance.

*"Hornbill is redefining the definition of 'customer service' in the ITSM software space. Whereas others are focused on fault handling times and measuring 'satisfaction' of a phone call that the customer didn't want to make in the first place, Hornbill measures its value by looking at its customers' successes. By funding an award program to highlight the excellent work carried out by its customers, deep participation in Twitter, the ITSM podcast and Back2ITSM, and introducing new technologies to clients, Hornbill is striving to improve itself, its clients and the entire ITSM industry."*

Howard Kendall, Chairman of SDI



## ABOUT THE AUTHOR



### Patrick Bolger

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Patrick Bolger is Chief Evangelist at Hornbill Service Management, helping to shape the direction of Hornbill's ITSM products to adhere to industry best practice, supporting frameworks such as ITIL (IT Infrastructure Library).

Patrick is dedicated to the communication of industry best practices, working closely with customers, industry associations and IT luminaries to identify trends and educate organisations on the opportunities associated with service excellence.

A compelling and popular speaker at events worldwide, Patrick contributes to many industry publications, has significant first-hand experience of the issues facing IT, and is an influential and recognised authority in the service management arena.

### About Hornbill

Hornbill is an industry-leading ITSM solutions provider founded in 1995. Hornbill's award-winning Supportworks service management software is designed to suit your level of IT Service Management maturity. Supportworks applications enable customers to get up and running quickly with minimal need for professional services. Unique Human Touch features improve the service experience, while powerful workflow automates ITSM processes. The highly configurable Supportworks platform and design tools enable customers to tailor the application, or build service desks for HR, Facilities, Customer Service and other areas of the business.

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