



# 5 Proven Strategies to Maximize Service Desk Efficiency

An Essential Guide to Working Smarter—Not Harder

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## Introduction

Digital innovation has fundamentally changed how the world operates. As modern technology permeates every area of our lives, our expectations around the availability of information and the speed with which we can obtain it are higher than ever before. This applies to how we shop, as well as how we make business and major life decisions.

As the digital era continues to unfold, your organization must quickly respond to these ever-changing customer expectations in order to compete and remain relevant. Likewise, your service desk must be nimble and efficient, in order to support shifting organizational priorities, capitalize on new opportunities, and satisfy growing end user demands for instantaneous and seamless service. But this “need for speed,” combined with increasing pressure to lower costs, runs counter to traditional approaches to ITSM that emphasize risk mitigation and control over efficiency and agility—leaving IT teams hamstrung and unable to play to their full potential.

You can strike the right balance between going faster and maintaining control, though. It just requires some new plays. Read on to learn how you can accelerate your service management initiatives by working smarter, not faster—and by introducing more efficient methods with which to serve the business.



# 1

## Optimize Your Approach to ITIL

### The Situation

ITIL is a set of recommended IT service management (ITSM) best practices that promotes interconnectivity among individual processes. But as a whole, ITIL can become overly complex when taken too literally, especially as more processes are implemented. For any given set of processes, ITIL might describe as many as 60 or 70 “best practices” you could implement. But there are likely just six or seven that will deliver the most value to your enterprise.

Furthermore, IT teams have historically operated in silos and, likewise, implemented ITIL processes within those silos. This approach has made interconnectivity an unattainable ideal, creating barriers to efficient service delivery.

Remember, ITIL emerged in the era of mainframes, when the waterfall methodology was prevalent. The emphasis was on process control and risk mitigation, not time to delivery. Of course, standardizing processes and reducing risk remain important today. But when your team leans too far in this direction, it takes too long to release even standard changes.

### The Smart Play: Apply Agile & Lean Practices to ITIL

Look at ITIL as a helpful set of guidelines, not hard and fast rules. Adapt it to your organization’s specific needs, as resources permit, with a focus on outcomes. Integrate the latest guidance from ITIL 4 into your service desk—particularly the guidance around Agile and Lean principles—apply those aspects of ITIL that best serve your enterprise and get you quickly to your desired results.

### People

Get your team thinking not in terms of process, but in terms of results and outcomes. Ensure your KPIs emphasize outcomes, rather than measuring the performance of processes in isolation.

Identify how silos within your organization might be hindering your team’s ability to work efficiently. Where possible, implement a project-based and/or cross-functional team approach that emphasizes value streams.

Share plans for upcoming work across teams. Solicit feedback, so high-value activities can be prioritized.



### **Process**

Minimize work in progress (WIP), such as open tickets, change and service requests, and so on. If queue volume is too great, it's time to identify root causes and adjust processes accordingly.

Think in "lean" terms, and remove work that adds no value. For example, eliminate unneeded steps in workflows, simplify and consolidate forms where possible, and only produce reports that are actionable.

Get "agile" by implementing smaller changes and more frequent releases. Even a service desk software implementation can be rolled out in sprints, instead of using a waterfall approach.

Start simple with a short list of the most impactful ITIL processes to optimize and standardize. Then rinse and repeat, taking on just a couple processes at a time.

### **Technology**

Begin with standard, out-of-the-box (OOTB) ITIL processes to speed implementations and lower administrative overhead.

Seek a "low-code" ITSM platform that enables you to easily customize these processes to suit your unique needs.

Implement dashboards and reporting to support your new KPIs and other outcome- and efficiency based metrics.



## 2

## Develop Your Automation Roadmap

### The Situation

When you're stuck working on mundane, repetitive tasks—password resets being an iconic example—you're left with far less time for higher value work. Yet, these high-value initiatives are the very things that produce outcomes that ultimately help your business move faster.

While automation holds the promise of greater efficiency and more freedom, it can be a big undertaking. Standardizing complex processes, defining sophisticated workflows, and taking an automated approach to multi-level approvals isn't easy. Workflows around requests like deploying server changes, employee onboarding, and product releases can be particularly challenging because they often rely on tribal knowledge and multiple dependencies, which result in new setbacks and slowdowns.

Furthermore, automating inefficient or low priority processes—and trying to automate too much, too quickly—can lead to new problems that overwhelm your automation efforts, or worse yet, grind them to a halt.



### The Smart Play: Automate Routine, Low-Value Tasks and Processes

Develop an automation roadmap, but use discretion, particularly at first. Cherry pick simple, but frequently used processes first, learn from your mistakes, and get more sophisticated as you go. Remember that automation will not fix a process that's broken to begin with; ensure your processes are bulletproof before you automate them.

### People

Enlist the help of your service desk staff to seek out manual, routine tasks that take up a lot of time and can be automated with minimal effort.

Encourage departmental staff and end users throughout the business to identify opportunities to improve and automate existing processes. Move beyond the walls of IT (more on this on page 13).

### Process

Prioritize the automation of simple tasks, like password resets and standard, pre-approved changes.

Identify repetitive manual tasks that can be automated, like sending status emails and acknowledgments. Automate approvals as much as possible, such as sending notifications and managing approvals.

Scrutinize any process or task before automating it. Automating the wrong processes—or broken ones—will only create more work and hinder productivity.

Establish performance metrics to ensure automations are, in fact, saving time and improving outcomes.

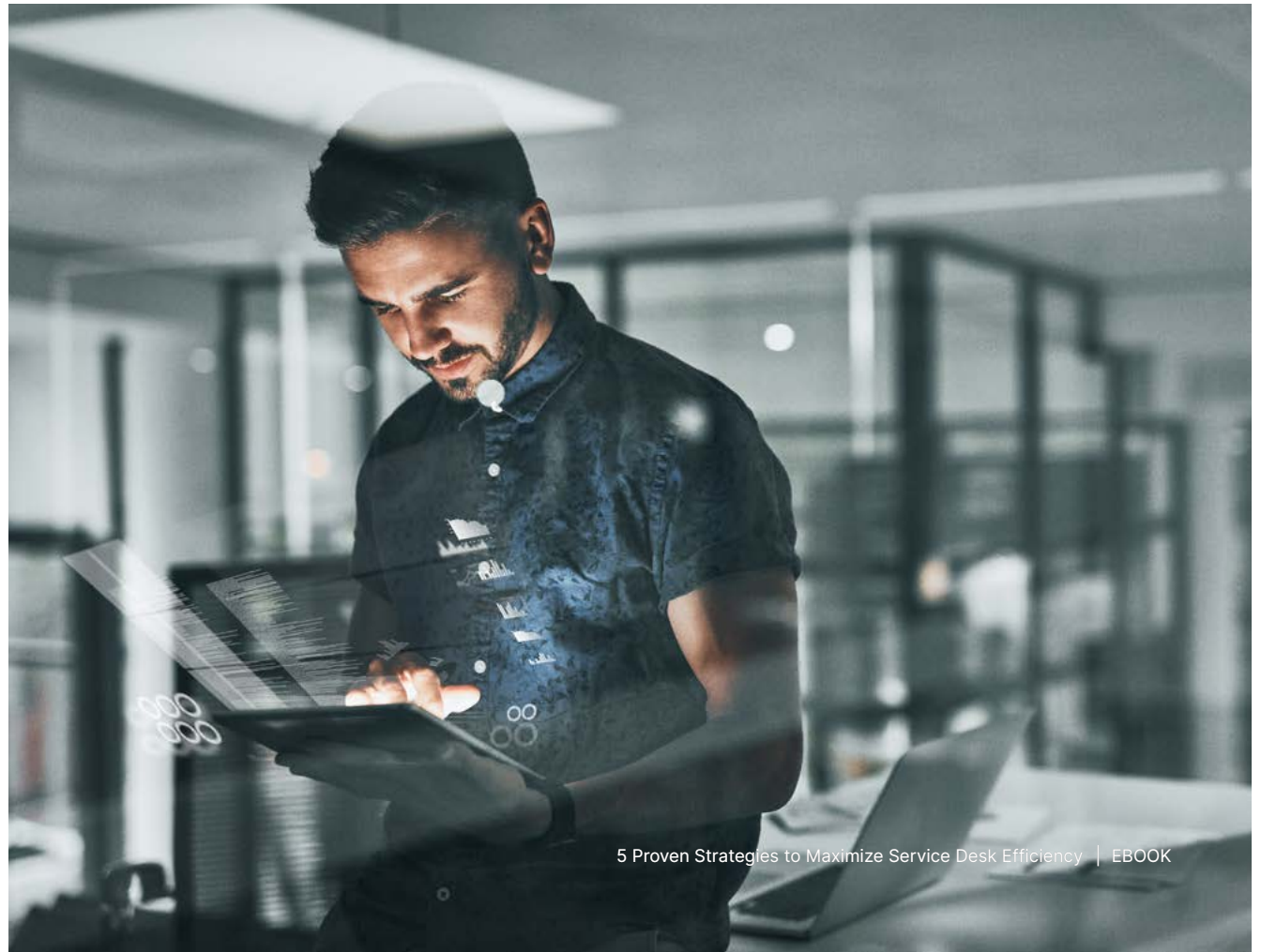
### Technology

Make use of your ITSM solution's pre-built automations, and/or create a library to share and re-use.

Ensure your ITSM platform enables service desk staff to quickly create and configure custom automations (more on this on page 9).

Take advantage of OOTB integrations with endpoints—like Active Directory for a password reset, or AWS or Azure for a cloud VM—to save time.

Use RESTful APIs to extend and integrate workflows beyond the service desk.



# 3

## Minimize Reliance on Developers

### The Situation

Legacy systems weren't designed to meet today's requirements for agility, flexibility, or extensibility—all of which can lead to significant gains in efficiency. Many require special programming expertise just to make simple modifications or upgrade from one version to the next. This leaves you leaning heavily on in-house programming skills or turning to third-party professional services. Unfortunately, both often take too much time and money.

Bottom line: When you're unable to rapidly implement, configure, or upgrade your service management solution, it's virtually impossible to move forward at a pace the business expects. And when you can't deliver new capabilities and services as needed, your business units and end users may begin bypassing IT entirely—not the outcome anyone is looking for.

### The Smart Play: Implement a Low-Code ITSM Platform

If your current ITSM platform requires a team of developers to support basic requirements, it may be time to look for an alternative. Your service management solution should be built on a low-code platform that enables any service desk administrator to quickly configure portals, dashboards, forms, workflows, and tasks—as well as quickly add new features, extend capabilities to other departments, and integrate with third-party products that are part of your IT infrastructure.

### People

Provide the training service desk admins need to be effective with your service management solution. It shouldn't take more than a few weeks to be formally trained, and proficiency should be achieved within a few months.

Join and engage with your vendor's extended user community to learn and share best practices.



### Process

Estimate the costs required—in both time and money—for development resources to administer, configure, customize, and perform ongoing maintenance on your current ITSM tool.

Research alternative technologies that offer lowcode design architecture. Compare anticipated costs with the cost of maintaining the status quo.

### Technology

Leverage OOTB processes to tailor your ITSM solution to meet your needs.

Where configuration is needed (portals, dashboards, service catalog, etc.), leverage a lowcode service management platform that provides a WYSIWYG editor and generates configuration metadata separate from the code base.

Tap into the vendor's library of pre-built integrations and extensions—as well as RESTful APIs—to enable rapid integration with other products and services.



# 4

## Enable End User Self-Sufficiency

### The Situation

Today's workforce expects to find the information they want, when they want it, using the channels of their choice. When your self-service portal doesn't provide a seamless experience—or you lack a portal altogether—it creates a domino effect. Your users are frustrated because they can't quickly resolve their own issues, and they have no choice but to turn to your L1 technicians to solve simple problems, leaving techs bogged down in basic support issues.

Despite this all-too-familiar problem, many self-service portals fall short when it comes to user experience. If your portal is poorly designed, relies on a weak or incomplete knowledge base, or doesn't contain a robust and growing catalog of services, your users aren't able to easily resolve issues for themselves. The result is diminished productivity among service desk staff and end-users alike.

### The Smart Play: Establish a Self-Service Portal Employees Want to Use

Give your employees the self-sufficiency they want by taking a “shift left” approach to the service desk. Establish a best-in-class self-service portal that enables users to efficiently resolve their own problems and check the status of tickets and service requests. When you empower users to help themselves you can free up IT staff to focus on initiatives that deliver game-changing outcomes.

#### People

Utilize UX experts—either from within or outside your organization—to optimize the user experience and ensure the portal is as user-friendly as possible. Constantly ask users for feedback and put yourself in their shoes.

Provide plenty of end user training and support to accelerate portal adoption and foster self-sufficiency.

Continue to offer email, phone, chat, walk-up, and desk-side service to meet your users where they're at. As portal utilization increases, reliance on these channels should naturally diminish.

### Process

Define a simple service catalog, comprised of both business and end-user inputs, and include pertinent details, such as estimated costs and delivery times, for each.

Prioritize automation of the most common requests—password resets, for example—to reduce handling time and shorten time to completion.

Implement online status reporting to significantly reduce inquiries and immediately boost satisfaction.

Conduct regular satisfaction surveys to measure and continually improve user experience.

Establish meaningful KPIs—such as reduction in call volume, ticket volume, and customer satisfaction—to measure the effectiveness of the portal and identify areas for improvement.

### Technology

Ensure your service portal—including the service catalog displayed—can be easily customized for individual roles and, if needed, localized for other languages.

Build a comprehensive knowledge base with intelligent search and curated knowledge. Take it a step further by allowing users to comment, vote on the usefulness of entries, and suggest new ones.

Offer a peer-to-peer discussion board or collaboration forum to empower end users to assist and learn from each other. When service desk personnel moderate and contribute, they'll get valuable insight to common user stumbling blocks.





## 5 Unify the Service Experience Across the Business

### The Situation

Business units outside of IT often lack even the most basic workflow automation for common processes. Chances are, one or more departments have come to IT, asking for help making their own service delivery processes more efficient. Individual legacy systems within departments—if systems exist at all—are frequently (and grossly) underutilized, leaving staff to rely on tribal knowledge, email, and spreadsheets. Furthermore, disparate systems and approaches to service delivery mean there's no single system of record that integrates workflows across departments.

When end users lack a common, consistent method for requesting services and resolving issues, they don't know where to turn for requests from IT, facilities, HR, or legal departments. This fragmented approach results in lost productivity for departmental staff and end users alike.

### The Smart Play: Extend ITSM Practices and Systems Beyond IT

In situations where line-of-business (LOB) processes are immature, ad-hoc, or poorly defined, leverage your ITSM platform, along with its companion HR Case Management, Facilities, or Security solutions. Centralizing IT and non-IT request handling and workflow automation on a single platform 1) enables a better user experience by presenting services in a common portal, and 2) facilitates improved service delivery on the back end by creating a single system of record. This smart play extends to replacing under-utilized legacy applications that are costly and inefficient to maintain. Where best-of-breed LOB applications do exist, consider presenting these in a common user portal.

### People

Approach and collaborate with stakeholders in other departments to identify processes and tasks that can be automated with your ITSM platform.

Form a multidisciplinary task force to collaborate on complex LOB workflows, especially those spanning multiple departments, such as employee onboarding, major security incident management, and disaster response.

### Process

Start with simple non-IT requests and workflows to prove the viability of utilizing ITSM systems and principles outside of IT.

Establish KPIs within each department to measure efficiency and effectiveness of service delivery.

### Technology

Extend your IT self-service portal to other lines of business to offer end users a single system of engagement for all service requests.

Leverage a single service catalog to add LOB services outside of IT.

Integrate the portal with essential enterprise solutions via pre-built integrations and RESTful APIs. This will allow you to extend service delivery with minimal cost and effort.

Where effective systems don't exist, utilize your ITSM platform to manage and automate key processes.





## Ready to Get More Done in Less Time?

IT teams are being slowed down by rigid processes, a lack of automation, and tools that are difficult to customize and extend. You must break free from what's no longer working to gain the speed and agility needed to lead your business through its digital transformation journey.

### Working more efficiently starts with five smart plays:

- Optimizing your approach to ITIL
- Developing your automation roadmap
- Minimizing dependence on developers
- Enabling self-sufficiency among end users
- Unifying the service experience across the business

Perhaps the single most important thing you can do to maximize service desk efficiency is to ensure your ITSM platform is propelling you forward—not holding you back.

When you're supported by a lightweight, flexible service management platform, you're more efficient, more agile, and able to go faster than you've ever gone before.

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