



**ivanti**

Toolkit:

# Harnessing Automation to Optimize IT Operations

# Inside:

This toolkit provides you with practical steps and illustrative use cases to help your organization scale and innovate, create a foundation for improved service and process management across the entire organization, and improve employee and customer satisfaction alike.

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# Introduction

Imagine a world where IT operations, employee demands and business goals seamlessly align. This frictionless future where you're ensured you'll stay connected anytime and anywhere is closer than you think — thanks to automation.

Ivanti research indicates that 63% of employees now work remotely at least some of the time. There's no denying that this new era of work, while liberating, comes with its unique set of difficulties, especially with ensuring security and delivering helpdesk support. 57% of professionals still face regular technology-related challenges, leaving IT teams with a rapidly growing backlog of issues to resolve.

Employees are calling for a superior digital employee experience (DEX), and 78% believe that their productivity would soar if they had better technology at their disposal.

As businesses strive to meet these demands, the spotlight is firmly set on the transformative power of automation and AI. Developments in the AI-driven automation landscape like next-generation chatbots and low-code and no-code solutions support rapid application and workflow development to democratize digital transformation processes.

These technologies hold the potential to revolutionize IT operations and management and, by extension, revolutionize DEX across all departments.

Throughout this toolkit, we'll explore the hurdles to optimizing operations and discover how AI-driven, low-code automation solutions can enhance both business efficiency and IT management.



## What are no-code and low-code?

No-code and low-code platforms make creating automation workflows quicker and easier than ever.

**No code** requires no programming knowledge at all, making it best for creating simple automation workflows.

**Low code** does require some basic coding skills but can support much more advanced solutions.



01

Strategic  
IT Refocus

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## Challenge

# Navigating away from mundane IT chores and steering toward pivotal goals

IT professionals often find themselves bogged down with repetitive tasks and avoidable issues that divert their attention away from more strategic initiatives. Common problems include lost passwords, locked accounts and issues with application access. Other problem areas include onboarding employees or offboarding those leaving the company, both of which can be time-consuming and fraught with security risks.

These issues compound to demotivate IT professionals who aspire to contribute strategically to the organization. This in turn leads to an increased risk of burnout and a decreased ability for businesses to attract and retain the best talent. At the same time, office workers end up underserved and grappling with technical issues that greatly hinder productivity.



### Did you know?

**17% of professionals — and double that among Gen Z — are contemplating quitting their roles due to discontent with inefficient technological infrastructure.**



# A self-service portal that frees up time for helpdesk teams to focus on strategic goals

Automation and self-service are fundamental in alleviating these challenges. By deploying IT service management (ITSM) automations with the help of no-code or low-code programming, IT support can streamline or even eliminate most mundane tasks. For instance, a self-service portal allows employees to handle common issues like account unlocks, password resets and new application access requests themselves. This not only empowers employees to resolve their issues swiftly, but also frees up IT teams to focus on more strategic tasks.

Furthermore, IT asset management (ITAM) automations can streamline requests related to hardware and software assets. Whether an employee is requesting a new laptop, smartphone or software installation, an automated self-service workflow can take care of all the necessary background checks and approvals. Or, when an employee is leaving the company, automated workflows can revoke access rights and remotely wipe devices. Grouping these functionalities together, we can have automated workflows like:

- **User Access and Communication:** seamlessly manage account unlocks, new email accounts, website access requests and address Active Directory trust errors.
- **Hardware and Software Management:** simplify requests for new computers, phones, software installations and ensure optimal performance with clean disk functionalities.
- **Vendor and System Management:** efficiently handle distribution list creation, system access requests and streamline vendor onboarding processes.

By leveraging these automations, IT teams can refocus their efforts, leading to improved efficiency, reduced burnout and enhanced employee satisfaction.



## Imagine this...



The IT team is regularly overwhelmed with requests for new laptops and smartphones.



They introduce an automated workflow to handle and approve requests in accordance with company policy.



The streamlined process leads to quicker deployments and more efficient onboarding of new employees.

## Out-of-the-box thinking

### Optimize office space with automated bookings

Automation also opens new horizons for facilities management by supporting workflows for allocating resources and handling maintenance requests. For example, IT could implement an automated system to streamline the process of booking meeting rooms and workspaces to ensure the optimal use of space and resources.

### A success story

Restaurant chain P.F. Chang's transformed IT support across their 200+ global locations by adopting a new self-service ITSM solution, leading to a 67% reduction in resolution times.

# 02

## Bridging IT Silos



## Challenge

# Establishing a unified front to boost collaboration between security and IT operations

In today's Everywhere Workplace, the need for seamless collaboration between security and IT operations has never been more important. However, many organizations still face the issue of siloed operations, in which these two critical functions operate in isolation. This separation leads to inefficiencies in many vital workflows, such as onboarding and offboarding for remote employees, vendor management, and ensuring visibility across all devices connected to the corporate network.

Worse still, the lack of intersection between IT and security operations results in an expanded attack surface, new vulnerabilities and miscommunications leading to delayed response times to critical issues. Moreover, without the right tools to promote transparency and collaboration, employees will be less able or willing to do their part in protecting your organization.



### Did you know?

**27% of office workers and IT personnel are frustrated by silos caused by issues like inefficient collaboration technologies and convoluted cybersecurity interfaces.**





## Answer

# An automated system for responding to all routine security and operations needs

To bridge the growing gap between security and IT operations, businesses need an integrated and scalable approach of the sort that only automation and low-code solutions can achieve. With automation, businesses can address routine security and operations needs swiftly and efficiently. This also frees up time to focus on high-priority issues and strategic challenges.

This convergence is essential in today's digital environment. Siloed operations inevitably lead to gaps in threat detection and response, making systems more vulnerable, especially when factoring in the added complexity of remote and hybrid work scenarios. By integrating IT and security workflows, organizations can ensure consistent policy enforcement, real-time threat detection and swift incident response. This unified approach not only strengthens security but also enhances operational efficiency, ensuring that both teams are aligned in their objectives and actions.



## Access and Vendor Management

streamlined processes for handling website access requests, system access requests and vendor onboarding ensure that only authorized individuals and vendors have access to critical systems.



## Security Compliance and Health Checks

automated antivirus compliance violation reports, basic security health checks and self-healing hosts files ensure that systems remain compliant and any anomalies are detected and addressed promptly.



## Profile and Extension Management

Automation can remove aged profiles, manage Chrome extensions and delete Outlook profiles to help maintain the integrity and security of user profiles and applications.

By integrating these solutions, organizations can ensure their IT operations and security teams work in tandem, eliminating silos and enhancing overall efficiency.

## Imagine this...



A new vendor requests access to a company system that's necessary for them to be able to provide their services.



An automated system evaluates the access request to ensure adherence to company policies and security protocols.



The new process streamlines vendor onboarding and enhances collaboration without compromising security.

## Out-of-the-box thinking

### Automate network monitoring for more IT efficiency

Automating the monitoring and management of network access requests ensures continuous protection by instantly analyzing and responding to unusual traffic patterns, flagging potential threats, and initiating appropriate countermeasures. This supports the seamless integration of IT operations and security for enhanced speed and efficiency.

### A success story

Vos Logistics enhanced performance and security by breaking down application silos and making complex user environments easier to manage.

# 03

## Endpoint Security Mastery

## Challenge

# Ensuring that every network node is protected against potential security threats

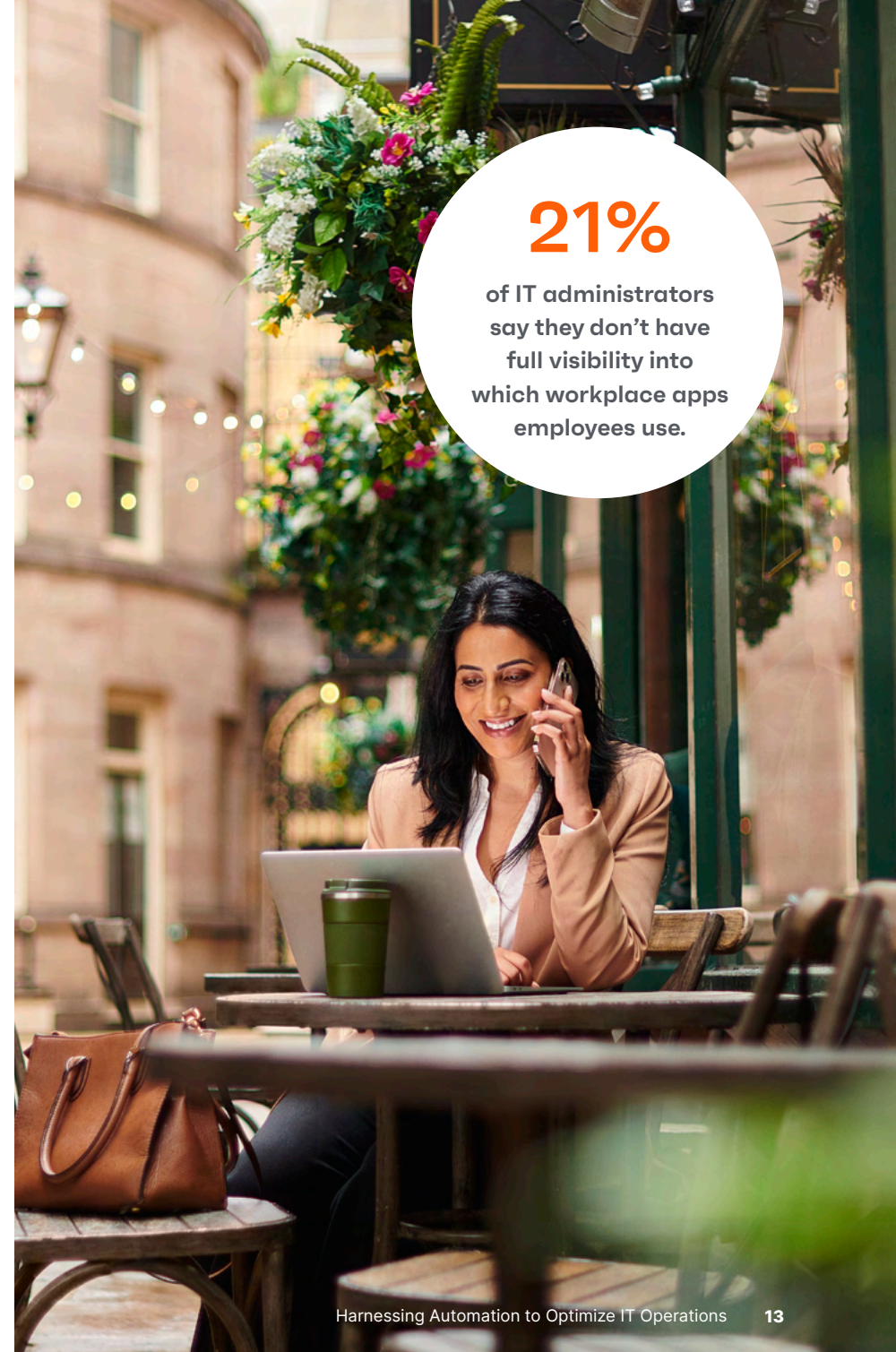
The Everywhere Workplace has ushered in a new era of connectivity, with employees able to access business resources from myriad devices and locations. But this freedom comes with a considerable security challenge, a responsibility that ultimately falls to the IT department. The notion of a secure perimeter is no longer relevant now that endpoints are spread far and wide across locations and networks.

The proliferation of laptops, tablets and smartphones, including devices owned by employees but also used for work, has greatly expanded the potential attack surface. With each device representing a potential entry point for malicious actors, it's imperative that all network nodes and endpoints are secured and managed from a centralized location.



### Did you know?

**Just 43% of IT administrators use an endpoint management solution to track IT assets, with 21% saying they don't have full visibility into which workplace apps employees use.**



**21%**

of IT administrators say they don't have full visibility into which workplace apps employees use.

## A system that automatically finds, heals and protects every device in any location

The only dependable way to face these challenges is with a comprehensive and centralized approach to endpoint security. Automation is an essential component of any such solution, as it overcomes the challenges of scale and complexity in an environment where devices used for work can be located practically anywhere in the world. This involves continuous monitoring and proactive healing and protection for every asset.

The first step is to establish a clear understanding of your digital environment. This involves creating an inventory of all devices that can access the network or contain potentially sensitive corporate data. Next, devices must be categorized based on function and access level to ensure that security measures applied are both rigorous and appropriate. Integrating AI-powered bots and automation tools can then proactively protect all devices by identifying potential vulnerabilities, automating patch management and even predicting threats.

- **Device and Equipment Management:** streamline requests for loaned equipment or new devices and automate smartphone and laptop provisioning.
- **Network and Application Access:** handle requests for access to applications, mobile networks and cloud resources to ensure only authorized devices can join the network.
- **Security and Compliance:** automatically remove aged profiles, self-heal host files, create antivirus compliance violation reports, carry out basic health checks or remove unexpected users from local admin groups.

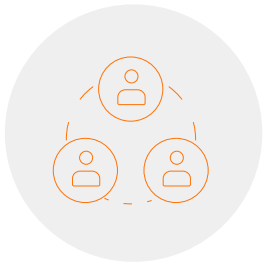
By leveraging these automated tools, organizations can maintain a robust security posture, ensuring every endpoint is shielded against potential threats.



## Imagine this...



Over time, user profiles accumulate on the network, some of which become outdated and pose a security risk.



An automated system identifies and removes profiles that haven't been accessed or updated within a given timeframe.



This process cleanses the network of vulnerabilities and reduces the attack surface to ensure continuous compliance and security.

## Out-of-the-box thinking

### Automate network monitoring for more IT efficiency

Automating the monitoring and management of network access requests ensures continuous protection by instantly analyzing and responding to unusual traffic patterns, flagging potential threats and initiating appropriate countermeasures. This supports the seamless integration of IT operations and security for enhanced speed and efficiency.

### A success story

Southstar Bank adopted a comprehensive device management solution to enhance network access protocols and ensure rigorous compliance with minimal impact on end users.

# 04

## Empowering Self-Service Support



## Challenge

# Slashing redundant support tickets and eliminating preventable issues

Before the Everywhere Workplace, organizations typically gave employees company-owned laptops and smartphones that had similar specifications and ran the same operating systems. Now, it's a very different environment, in which employees use myriad devices of different form factors, hardware standards and operating systems to connect to company resources every day.

While allowing employees to use their preferred devices for work is undoubtedly beneficial for productivity and morale, it has a high burden on helpdesk support, which has to accommodate a much broader range of systems. In the absence of a robust self-service option, employees have no choice but to resort to convoluted — and sometimes risky — workarounds or spend hours waiting for helpdesk support to respond to emails or phone calls.



### Did you know?

**45% of employees call IT helpdesk support by phone, whereas only 12% use an automated self-service tool and 9% use an automated virtual assistant.**



**45%**

of employees  
call IT helpdesk  
support by phone



## A self-service solution powered by a next-gen chatbot and workflow automation

Tools like virtual assistants, next-generation chatbots and user-friendly wizard interfaces, are rapidly emerging as a way to completely transform IT support. A far cry from the much more basic scripted bots of old, modern virtual assistants can understand a huge range of user queries. They can guide users through complex troubleshooting processes, providing instant solutions that once took hours or even days to resolve. Best of all, the vast majority of queries can be resolved without ever having to contact helpdesk support.

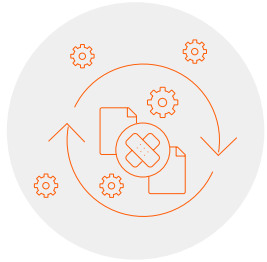
Furthermore, the integration of chatbots with low-code and no-code processes and platforms continues to open up a realm of possibilities. These solutions empower employees with the ability to address numerous challenges autonomously. Not only does this proactive approach to problem-solving reduce ticket volumes and eliminate time wasted on predictable and preventable issues — it also has a huge impact on DEX by helping employees work faster and smarter.

- **Device Compliance and Health:** having tools in place to monitor battery health, track devices with expiring certificates and ensure device compliance helps improve security and performance in remote work environments.
- **System Performance:** automated solutions to address device driver issues, manage print spoolers and enhance overall system performance ensure that employees face minimal disruptions in their daily tasks.
- **Connectivity:** bot-powered workflows like troubleshooting RDP (remote desktop protocol) connections ensure seamless connectivity and help reduce the impact of unplanned outages.

Thanks to these automated workflows, businesses can empower employees, while IT support is free to work more efficiently and responsively.



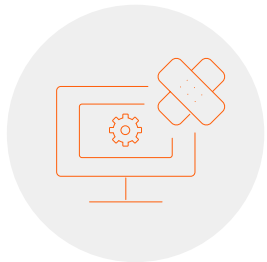
## Imagine this...



IT support teams are inundated with tickets from employees struggling to install a new application on their work devices.



A self-service portal equipped with a next-generation chatbot guides employees through the setup process.



The routine issue is resolved quickly without the need for direct helpdesk intervention, thus enhancing employee productivity.

## Out-of-the-box thinking

### Identify self-service improvements using DEX score

The digital employee experience (DEX) score isn't only relevant to HR teams. IT workers can also leverage the DEX score to identify patterns or common issues in self-service interactions. For example, if many employees consistently encounter issues with a particular type of request, this may indicate a need to develop a more intuitive and automated workflow.

### A success story

Victoria University deployed Ivanti Neurons for ITSM to dramatically enhance user experience, leading to improved service metrics and an award for the 'Most Improved Student Services'.

05

Swift Ticket  
Resolutions

## Challenge

# Empower helpdesk efficiency by ensuring queries are resolved rapidly

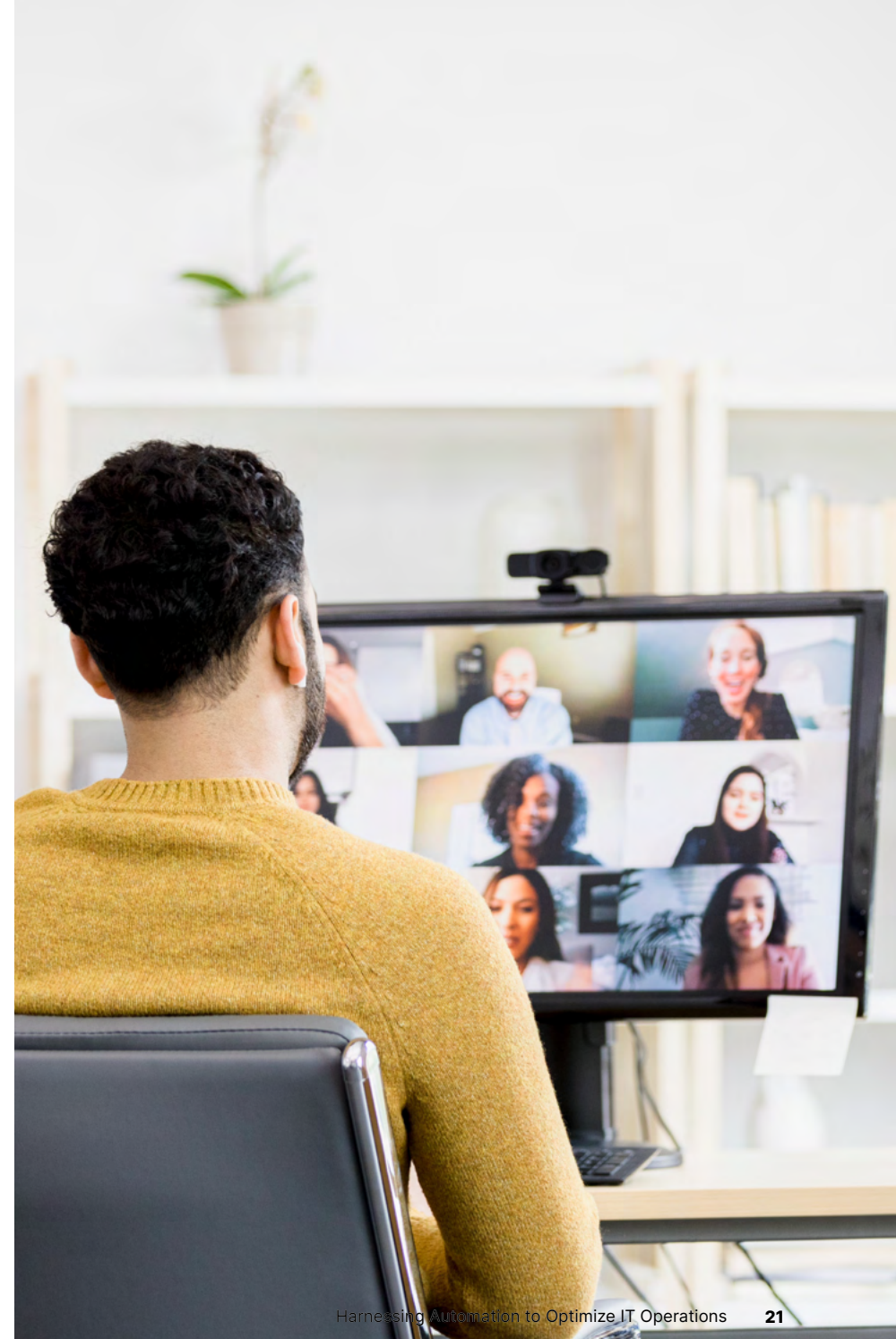
Employees expect near-instantaneous solutions to their technical woes, regardless of how or when they contact support or what sort of device they're using. The shift to remote and hybrid work has further complicated the environment, leaving many helpdesk support teams facing a surge in tickets. With employees scattered across different locations and using a wide variety of devices to access workplace resources, no two support requests look the same either.

For service desks, mean time to resolution (MTTR) is a crucial KPI. The longer the MTTR, the greater the impact on employee productivity and morale and, ultimately, the bottom line. Those still heavily reliant on manual processes will have a harder time prioritizing tickets, resulting in prolonged disruptions. Factors like ticket misclassification, a lack of automation and a growing volume of tickets also contribute to a longer MTTR, impacting both employee satisfaction and operational efficiency.



### Did you know?

**32% of helpdesk support staff have seen an increase in tickets due to remote working, making clear the need for faster resolution times.**



## A system with automated ticket classification to prioritize helpdesk support tickets

The role of automated ticket classification cannot be overstated, especially in more complex environments where employees are spread across the country and beyond and use their own devices to access digital workspaces. With automated solutions, organizations can categorize tickets based on urgency and complexity, allowing helpdesk teams to prioritize and address issues in a more structured manner. In doing so, they'll be able to improve MTTR for all types of problems.

Another promising innovation for improving MTTR is the emergence of highly accurate voice-powered automation functions. By leveraging voice enablement for intelligent call routing and integrated voice response and self-service, helpdesk teams can address a significant portion of queries without manual

intervention. Thanks to voice-powered virtual assistants, which are much smarter than they used to be, helpdesk support representatives will have much more time available to deal with queries that still need to be addressed manually.

- **System Diagnostics and Maintenance:** automated tools can perform operations like reporting on blue-screen crashes, clearing internet browser caches or running network diagnostics to ensure systems run smoothly and issues are addressed preemptively.
- **Extension and Profile Management:** bots can eliminate the need to manually check enabled browser extensions, delete old user profiles and carry out various other vital operations necessary to maintaining security and integrity.
- **Software and Application Monitoring:** automated workflows can also check for any repeated attempts to install or uninstall software, which may point to end users having problems with particular applications.

By deploying these tools, helpdesk teams can reduce ticket volumes and resolution times to ensure a seamless experience for end users.



## Imagine this...



An employee repeatedly faces installation issues with a particular application, pushing them to try multiple times.



An automated solution detects the multiple installation attempts and flags the issue for immediate attention.



The helpdesk team quickly intervenes to provide a lasting solution, reducing downtime and frustration.

## Out-of-the-box thinking

### Leverage ITSM for HR

IT departments can also extend the use of their ITSM platforms to support HR operations. For example, imagine an automated system that, upon a new hire being entered into the database, triggers a workflow to provision a laptop and install all required software and resources. This integration ensures that new employees have everything they need from day one.

### A success story

Loyola University Chicago optimized its service desk support processes for its vast community of staff, students and alumni, granting user access 80% faster than previously.

# 06

## Curbing Escalations



## Challenge

# Handling issues adeptly and minimizing the need for high-level interventions

With employees operating from diverse locations and using a plethora of devices, the volume of support tickets has surged. So too has the number of escalations to specialized support tiers, even though many of them are avoidable. For example, one of the most common support requests is password resets. In most instances, these can be eliminated entirely by using a self-service password reset function instead of having to contact the helpdesk.

Avoidable escalations are often down to helpdesk support teams being overwhelmed with many requests. By automating common problem resolution workflows, requests can be greatly reduced. Moreover, with an automated classification system, issues that do require manual intervention can be categorized appropriately, resulting in more first-call resolutions and a reduced need for high-level interventions.



### Did you know?

**37% of IT teams use speed of ticket resolution to measure and improve support quality, reduce escalations and resolve more issues on the first call.**



# A platform that automates everyday IT support operations and ticket resolutions

The fact is that the clear majority of IT support requests can be resolved automatically, whether it's something as simple as a password reset or a more complex workflow such as provisioning an entire virtual workspace. The emphasis on proactive problem management has never been more important, with automation and low-code workflows emerging as critical enablers in the swift identification and rectification of a multitude of common (and not-so-common) issues.

For example, if an essential workplace application is missing from a work device, it shouldn't be necessary to escalate the issue. Instead, an automated system should detect the anomaly and install the missing application or send an alert to support if manual approval is required. This way, support can keep

ticket escalations to a minimum and adopt a 'shift left' mentality that equips them with the tools and knowledge they need to markedly reduce MTTR, optimize resource allocation and boost overall efficiency.

- **Device and Software Management:** automating routine workflows like identifying and installing missing applications or repeated attempts to install applications ensures that all workplace devices are equipped with essential software and configured as required.
- **Network and Connection Solutions:** network diagnostics tools and remote desktop protocol (RDP) troubleshooting wizards offer real-time solutions to connectivity issues that help minimize downtime.
- **Security and Compliance:** being able to search for invalid certificates and self-heal devices proactively identifies and rectifies potential security issues to fortify IT against a multitude of common threats.

By harnessing these automated solutions, helpdesk teams can adeptly manage tickets, curtail escalations and guarantee a frictionless IT experience for end users.



## Imagine this...



During a virtual meeting, an employee experiences repeated network disconnections, resulting in a helpdesk escalation.



An automated network diagnostics tool identifies a configuration error as a likely culprit and resolves it instantly.



The issue is fixed without the need for escalation, ensuring the worker's uninterrupted participation in the meeting.

## Out-of-the-box thinking

### Proactively solve problems with self-healing informed by DEX

IT teams can leverage the DEX score to identify patterns indicating device performance issues, and, when a certain threshold is crossed, the system initiates a self-healing process. This may involve clearing caches, updating drivers or even performing a system reboot where required. This prevents minor issues from being escalated, while enhancing end user satisfaction.

### A success story

The Denton Independent School District seamlessly integrated its phone system with Ivanti's Service Manager to elevate first-call resolution rates and enhance customer satisfaction.

# 07

## Measuring Employee Feedback

## Challenge

# Tapping into employee sentiment information to drive service excellence

Employee feedback is vital for informing decisions that improve service quality and operational effectiveness. Moreover, employees are much more likely to feel valued if they have a means to provide feedback and know that their voices are heard. That's why, in forward-thinking organizations, HR teams view employees similarly to how sales teams view their customers. However, accommodating and acting upon employee feedback is inevitably more complicated in hybrid work environments.

The common sense of detachment when coupled with potential feelings of being overlooked when faced with technical difficulties can escalate into dissatisfaction and reduced productivity. Fortunately, feedback can serve as a bridge to understanding these sentiments and allowing employees to express their concerns, needs and suggestions. This feedback is a gold mine of valuable insights that are critical in driving service excellence.



### Did you know?

**Only 36% of IT teams use device and application performance metrics to track DEX, and even fewer use conversational AI and collaboration tools to collect feedback in real time.**



## A tool to gauge employee sentiment and track and optimize experience over time

Sentiment analysis has long played an important role in determining how customers feel about a brand. Today, sentiment analysis is rapidly emerging as a way to gauge employee sentiment, too. By using AI-powered sentiment analysis and automation, decision-makers can analyze text and voice to detect underlying emotions, trends and patterns. When it comes to helpdesk support and the digital employee experience, these insights can help determine training needs and even inform the development of workplace culture.

By offering a structured approach to gathering feedback, surveys are another valuable way to gauge employee sentiment to improve service quality. With the added benefits of automation, the process of creating, distributing and

analyzing survey results becomes quicker and easier, too. For example, automated reminders lead to higher response rates, while AI analytics can provide actionable, real-time insights from the data collected.

- **Automated Feedback Collection:** examples include tools that automatically prompt employees to leave feedback after a support ticket resolution or after using a new tool or application.
- **Real-time Sentiment Analysis:** AI tools can analyze employee communications, such as emails, chats or interactions on collaboration platforms, to gauge overall sentiment and alert management about potential concerns.
- **Survey Workflow Automation:** from sending out scheduled employee satisfaction surveys to analyzing the results and generating actionable reports, every step can be automated to ensure consistency and efficiency.

With the help of sentiment analysis and automated survey workflows, companies can leverage the digital employee experience (DEX) score to inform the satisfaction and sense of belonging among their employees.



## Imagine this...



A new software update leads to unexpected usability issues for employees, having an impact on their productivity.



AI-powered sentiment analysis detects increased frustration by monitoring employees' communications on business platforms.



IT support uses automated feedback collection to learn more about user experiences and identify and resolve the issue.

## Out-of-the-box thinking

### Use DEX to inform employee training plans

In a novel application of the DEX score, IT teams can use it to proactively identify employee training needs. By analyzing DEX scores and support ticket information, patterns can emerge indicating areas where employees struggle with technology. For instance, a high volume of tickets relating to a specific application might signal a need for extra training in that application.

### A success story

Foodstuffs used Ivanti's solutions to streamline its IT operations, enhancing user experiences and garnering insightful feedback from employees across the board.



## Summary

In the age of automation and artificial intelligence, the potential for enhanced digital employee experiences (DEX) is vast. As organizations embrace the Everywhere Workplace, they're met with the promise of increased flexibility, productivity and employee satisfaction. However, this new era also brings with it a unique set of challenges. IT teams are now navigating a maze of endpoints, while simultaneously grappling with an influx of support tickets. The demand for swift resolutions and the need to curb escalations further adds to the complexity.

Moreover, the voice of the employee has never been louder. Employees seek intuitive digital workspaces, quick resolutions and proactive support. But with challenges come opportunities. The rise of next-generation virtual assistants, AI-driven sentiment analysis, no-code and low-code solutions and advanced automation tools offers a beacon of hope. These innovations not only streamline IT operations but also empower employees to get involved in digital transformation, further fostering a greater sense of belonging and trust.

By harnessing the power of the strategies and solutions outlined in this toolkit, organizations can transcend these challenges. They can craft a robust IT infrastructure, reduce ticket volumes and, most importantly, enhance the overall DEX. In doing so, they pave the way for improved external customer service and drive superior business outcomes. With the right tools and mindsets, the road to digital transformation is not just clearer but also a clear pathway to sustainable business growth.



Toolkit:

# Harnessing Automation to Optimize IT Operations

Strategic insights for improving your helpdesk support and endpoint security operations while leveling up digital employee experience



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