Service Relationship Management
In Higher Ed

Tommy Lee
Solution Architect
ServiceNow
CERN

The Makings of a Modern City
The Heart Of It Is...

**request**

*noun*

noun: request; plural noun: requests

1. an act of asking politely or formally for something. 
   "a request for information"
   synonyms: appeal, entreaty, plea, petition, application, demand, call;

**Origin**

- LATIN
- OLD FRENCH
- ENGLISH

Middle English: from Old French *requeste* (noun), based on Latin *require*
# The ServiceNow Portfolio – Core To Your Functional Capabilities

<table>
<thead>
<tr>
<th>Management Applications</th>
<th>Operational Applications</th>
<th>Infrastructure Applications</th>
<th>Platform</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Portfolio</strong></td>
<td><strong>Incident</strong></td>
<td><strong>Discovery</strong></td>
<td><strong>Service Automation Platform</strong></td>
</tr>
<tr>
<td>Add workstation inventory access</td>
<td>Related host - Groups</td>
<td>Backup done by - Groups</td>
<td>Single architecture and single data model - Social IT • Reporting • Survey Management • Content Management System • Knowledge Management &amp; Managed Documents • Service Level Management • Graphical Workflow • App Creator • Team Development • Mobile</td>
</tr>
<tr>
<td><strong>GRC</strong></td>
<td><strong>Change</strong></td>
<td><strong>Asset</strong></td>
<td><strong>Cloud Provisioning</strong></td>
</tr>
<tr>
<td><strong>Cost</strong></td>
<td><strong>Service Catalog</strong></td>
<td><strong>Orchestration</strong></td>
<td><strong>Config. Automation</strong></td>
</tr>
<tr>
<td><strong>Performance Analytics</strong></td>
<td><strong>Work</strong></td>
<td><strong>Orchestrator</strong></td>
<td><strong>Vendor Performance</strong></td>
</tr>
<tr>
<td>10.7 % Mar 14</td>
<td>Order Things</td>
<td>SDLC</td>
<td>Overall Rating</td>
</tr>
<tr>
<td></td>
<td>Computers and Hardware</td>
<td></td>
<td>Vendor Rating</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Service Rating</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Technology Rating</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Feature Rating</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Support Rating</td>
</tr>
</tbody>
</table>

### Platform Features

- **Single architecture and single data model**
- Social IT • Reporting • Survey Management • Content Management System • Knowledge Management & Managed Documents • Service Level Management • Graphical Workflow • App Creator • Team Development • Mobile

© 2014 ServiceNow All Rights Reserved
The Unstructured Service Model

Requester

Provider

I need something
Who do I contact? How?

Send email to individual or alias

Initiate Request

What is this request?
Contact requester to get critical information

Process Request

Provide more information
Is anyone working on it?
Send follow up email
Did anyone receive the request?

Request Fulfillment

Receive request completion notification
What's the status

Identify approvers
Send email to gain approvals
Track down and record approvals
Send emails to request fulfillment contributors

Provide generic status update
Track down fulfillment task status
Notify request is complete

Track down fulfillment task status

Did anyone receive the request?

Receive request completion notification

Provide generic status update

Did anyone receive the request?

Receive request completion notification

Provide generic status update

Did anyone receive the request?

Receive request completion notification

Provide generic status update
Results Of The Unstructured Service Model

INEFFICIENCIES  RISKS  KNOWLEDGE SHARING
Results Of The Unstructured Service Model

COST

MORALE
Four Pillars of Service Relationship Management

- Requester
- Service Experience
- Record Keeping
- Process Automation
- Business Management
- Provider
4 Pillars of SRM – Service Experience

Provide Requestors With A Solution That’s…

✔ Easy To Find
✔ Easy To Use
✔ Easy To Track
Welcome to BYU's Office of Information Technology

We are pleased to provide technology solutions and assistance for the university community. Browse the categories (Employees, Students, CSR, System Admins, Alumni, Guests and Retirees) to see details about services available to you. To see a complete list of services, log in and visit our service catalog. If you need help with an CIT service, please click Report a Problem.
Choose from the following:

I need Help

Do you need any help from IT Operations that you are unsure how to categorize? Submit a ticket here. Help Desk dispatchers will review your ticket and route it to the right group for escalation. Desktop Support issues such as computer equipment or software issues start here as well.

Based on your interest in: Getting things Fixed!!
4 Pillars of SRM – Record Keeping

Provide **All Users** With A Solution That’s...

- A Common Interaction Point
- The Basis for Reporting, Analytics, & Audits
- Securable
Incident | Required field
---|---
**Number:** INC0003035
**Caller:** Yvette Kokoska
**Configuration item:** Google App Engine
**Category:** Inquiry / Help
**Subcategory:** External Application
**Impact:** 2 – Medium
**Urgency:** 2 – Medium
**Priority:** 3 – Moderate
**Short description:** Google App Engine is on fire.

**Time worked:** 00:00:41 / 00:00:12
**Opened:** 2013-10-10 16:02:27
**Opened by:** Yvette Kokoska
**Contact type:** Self-service
**State:** Active
**Assignment group:** Service Desk
**Assigned to:** ITIL User

Notes
---
**Notes**
- **Watch list:**
- **Work notes list:**
- **Additional comments (Customer visible):**
- **Work notes:**
4 Pillars of SRM – Process Automation

Provide **Fulfillers** With A Solution That’s…

- Task-Centric
- Structured
- Repeatable
4 Pillars of SRM – Business Management

Provide Stakeholders With A Solution That Can Manage...

✔ Work
✔ Resources
✔ Performance
Service Relationship Management

Requester

- Service Catalog
- Search Knowledge
- Collaborate

Provider

- Service Oriented Workflow
- Approvals & Notifications
- Reporting & Analytics
- KPI Dashboards

Executives

- Business Dashboards

Update Service Status
Assign & Track Work

© 2014 ServiceNow All Rights Reserved
What’s Out There?

- Where are requests fielded today?
- How many request systems are you aware of?
- What are the top ten requests in each system?
- How satisfied are requestors with the interfaces? How about the fulfillers?
- How satisfied are requestors with the service experience?
- How consistent and automated are the fulfillment processes?
- Are fulfiller groups able to improve their processes through measurable outcomes?
Request Systems Poll

Get Ready For It...
# ServiceNow SRM Evaluation

<table>
<thead>
<tr>
<th>Total licensed apps that can be consolidated to ServiceNow</th>
<th>Total Project Management Systems</th>
<th>Total Reporting Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>52</td>
<td>6</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IT systems to consolidate</th>
<th>Shared services and line-of-business systems to consolidate</th>
</tr>
</thead>
<tbody>
<tr>
<td>42</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Number of Request Systems</th>
<th>Backlogged Development Requests by Department</th>
<th>Data Repositories by Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>463</td>
<td>16</td>
</tr>
</tbody>
</table>

- **IT incident management and request management systems**: 0
- **Shared services and line-of-business case management systems**: 1
- **Email aliases serving as request management systems**: 650
- **Paper-based forms for request management**: 850

- **Information Technology**: 463
- **Human Resources Operations**: 0
- **Facilities Management Operations**: 0
- **Finance Operations**: 0
- **Marketing Operations**: 0
- **Legal Operations**: 0
- **Additional Operations**: 0

© 2014 ServiceNow All Rights Reserved
## ServiceNow SRM Evaluation

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Rating</th>
<th>Redundant Systems</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Catalog</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Service Catalog.</td>
</tr>
<tr>
<td>Request Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Request Management.</td>
</tr>
<tr>
<td>Incident Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Incident Management.</td>
</tr>
<tr>
<td>Password Reset</td>
<td>🟦</td>
<td>1</td>
<td>A single password reset engine built on the ServiceNow platform. Drive automation, self-service.</td>
</tr>
<tr>
<td>Knowledge Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Knowledge Management.</td>
</tr>
<tr>
<td>Problem Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Problem Management.</td>
</tr>
<tr>
<td>Change Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow Change Management.</td>
</tr>
<tr>
<td>Release Management</td>
<td>✗</td>
<td>0</td>
<td>No app in use. Use ServiceNow to extend change and app deploy workflow to manage releases using a single system.</td>
</tr>
<tr>
<td>Work Management (Field Service)</td>
<td>✗</td>
<td>1</td>
<td>A SaaS management tool that consolidates project leaderboards for all projects and uses a single work management platform.</td>
</tr>
<tr>
<td>Project Management</td>
<td>✔</td>
<td>3</td>
<td>Consolidate project tools. Assign and manage all tasks, including project tasks, in a single system.</td>
</tr>
<tr>
<td>Asset Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow IT Asset Management.</td>
</tr>
<tr>
<td>Software Asset Management</td>
<td>✔</td>
<td>0</td>
<td>ServiceNow IT Asset Management in use.</td>
</tr>
<tr>
<td>Service Level Management</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow SLA Management.</td>
</tr>
<tr>
<td>Internal Chat / Social Collaboration</td>
<td>✔</td>
<td>0</td>
<td>Using ServiceNow social capabilities.</td>
</tr>
<tr>
<td>Reporting</td>
<td>✔</td>
<td>0</td>
<td>Currently using ServiceNow. For more dynamic analytic capabilities, check out ServiceNow Performance Analytics.</td>
</tr>
</tbody>
</table>

### Redundant Systems

- **Reporting**
- **Internal Chat / Social Collaboration**
- **Service Level Management**
- **Software Asset Management**
- **Asset Management**
- **Project Management**
- **Work Management (Field Service)**
- **Release Management**
- **Change Management**
- **Problem Management**
- **Knowledge Management**
- **Password Reset**
- **Incident Management**
- **Request Management**
- **Service Catalog**
Engaging The Business

Understand ➞ Align ➞ Synchronize
Engaging The Business

Understand

Understand the Business’ Capabilities and their Priorities/Objectives –

*To establish a baseline language and common outcome.*
Engaging The Business

Understand
So, How Do We Get Started?

Translate and Bridge the Business’ Perspective to IT’s –

To demonstrate an achievable vision to the business.
Framing Service Management for Business Transformation

- **SERVICE STRATEGY**
  - Demand Management
  - Financial Management
  - Strategy Generation
  - Service Portfolio Management

- **SERVICE DESIGN**
  - Service Catalogue Management
  - Service Level Management
  - Capacity Management
  - Availability Management
  - Service Continuity Management
  - Information Security Management
  - Supplier Management

- **SERVICE-transition**
  - Knowledge Management
  - Change Management
  - Asset & Configuration Management
  - Release & Deployment Management
  - Transition Planning & Support
  - Service Validation & Testing
  - Evaluation

- **SERVICE OPERATIONS**
  - Incident Management
  - Problem Management
  - Event Management
  - Request Fulfilment
  - Access Management
  - Operations Management
  - Service Desk
  - App Management
  - Technical Management
  - IT Operations

- **CONTINUOUS IMPROVEMENT**
  - Service Measurement
  - Service Reporting
  - Service Improvement

© 2014 ServiceNow All Rights Reserved
## Framing Clinical Engineering to Service Management

<table>
<thead>
<tr>
<th>Service Strategy</th>
<th>Service Design</th>
<th>Service Transition</th>
<th>Service Operation</th>
<th>CSI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance Mgmt</td>
<td>Skills &amp; Certification</td>
<td>Release Mgmt</td>
<td>Preventative Maintenance</td>
<td>Cost Analysis</td>
</tr>
<tr>
<td>Financial Mgmt</td>
<td>Compliance &amp; Regulations</td>
<td>Project Mgmt</td>
<td>Corrective Maintenance</td>
<td>Supplier Performance</td>
</tr>
<tr>
<td>Business Relation Management</td>
<td>Asset Suppliers &amp; Contracts</td>
<td>SDLC</td>
<td>Parts Transactions</td>
<td>Customer Satisfaction</td>
</tr>
<tr>
<td></td>
<td>Work Order Response &amp; Escalation</td>
<td>Procedures Repository</td>
<td>Time Cards</td>
<td>Work Order Performance</td>
</tr>
<tr>
<td></td>
<td>Device Lifecycle</td>
<td>Device Model Onboarding/Offboarding</td>
<td>Technician Dispatch</td>
<td>Device Model Performance</td>
</tr>
<tr>
<td></td>
<td>Safety Recalls/Hazard Alerts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© 2014 ServiceNow All Rights Reserved
The ServiceNow Portfolio – Core To Your Functional Capabilities

- Single architecture and single data model
- Social IT • Reporting • Survey Management • Content Management System • Knowledge Management & Managed Documents • Service Level Management • Graphical Workflow • App Creator • Team Development • Mobile

Platform

Service Automation Platform
Engaging The Business

Synchronize and prioritize initiatives across the Business –

To maximize investments
## Identify and Highlight Cross-Business Impacts & Benefits

### Manage Essential Management Services

<table>
<thead>
<tr>
<th>Business Strategy &amp; Planning</th>
<th>Products &amp; Services Management</th>
<th>Business Performance Management</th>
<th>Organizational Governance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define &amp; establish strategy</td>
<td>Manage deliverables</td>
<td>Define &amp; establish strategy</td>
<td>Manage partners &amp; alliances</td>
</tr>
<tr>
<td>Implement programs/strategies</td>
<td>Manage projects</td>
<td>Define &amp; establish strategy</td>
<td>Manage partners &amp; alliances</td>
</tr>
<tr>
<td>Test &amp; pilot programs/strategies</td>
<td>Manage customer experience</td>
<td>Manage &amp; control performance</td>
<td>Manage partners &amp; alliances</td>
</tr>
<tr>
<td>Monitor &amp; maintain programs/strategies</td>
<td>Manage &amp; control performance</td>
<td>Manage &amp; control performance</td>
<td>Manage partners &amp; alliances</td>
</tr>
<tr>
<td>Manage &amp; control performance</td>
<td>Manage &amp; control performance</td>
<td>Manage &amp; control performance</td>
<td>Manage partners &amp; alliances</td>
</tr>
</tbody>
</table>

### Operate Essential Management Services

<table>
<thead>
<tr>
<th>Marketing &amp; Communications</th>
<th>Sales &amp; Business Development</th>
<th>Customer Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define customer strategy</td>
<td>Manage &amp; control marketing</td>
<td>Manage &amp; control customer experience</td>
</tr>
<tr>
<td>Implement &amp; manage communication</td>
<td>Manage &amp; control sales</td>
<td>Manage &amp; control customer experience</td>
</tr>
<tr>
<td>Monitor &amp; maintain programs</td>
<td>Manage &amp; control customer experience</td>
<td>Manage &amp; control customer experience</td>
</tr>
<tr>
<td>Test &amp; pilot programs</td>
<td>Manage &amp; control customer experience</td>
<td>Manage &amp; control customer experience</td>
</tr>
<tr>
<td>Manage &amp; control customer experience</td>
<td>Manage &amp; control customer experience</td>
<td>Manage &amp; control customer experience</td>
</tr>
</tbody>
</table>

### Support Essential Management Services

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage &amp; control financial processes</td>
<td>Manage &amp; control procurement</td>
<td>Manage &amp; control service management</td>
<td>Manage &amp; control ICT</td>
<td>Manage &amp; control property &amp; asset management</td>
</tr>
<tr>
<td>Monitor &amp; maintain financial processes</td>
<td>Manage &amp; control procurement</td>
<td>Manage &amp; control service management</td>
<td>Manage &amp; control ICT</td>
<td>Manage &amp; control property &amp; asset management</td>
</tr>
<tr>
<td>Test &amp; pilot programs</td>
<td>Manage &amp; control procurement</td>
<td>Manage &amp; control service management</td>
<td>Manage &amp; control ICT</td>
<td>Manage &amp; control property &amp; asset management</td>
</tr>
<tr>
<td>Implement &amp; manage financial processes</td>
<td>Manage &amp; control procurement</td>
<td>Manage &amp; control service management</td>
<td>Manage &amp; control ICT</td>
<td>Manage &amp; control property &amp; asset management</td>
</tr>
<tr>
<td>Manage &amp; control financial processes</td>
<td>Manage &amp; control procurement</td>
<td>Manage &amp; control service management</td>
<td>Manage &amp; control ICT</td>
<td>Manage &amp; control property &amp; asset management</td>
</tr>
</tbody>
</table>

### Field, Technical Services, Engineering & Construction

- Work order management
- Program/Project Management
- Logistics & Supply chain management
- Environmental services management
- Technical services management
- Warehouse management
- Engineering & infrastructure construction management
- Field services
- Manage safety
Four Pillars of Service Relationship Management

REQUESTER

SERVICE EXPERIENCE

SERVICE EXPERIENCE

RECORD KEEPING

PROCESS AUTOMATION

BUSINESS MANAGEMENT

EXECUTIVES

PROVIDER
What’s Out There?

- Where are requests fielded today?
- How many request systems are you aware of?
- What are the top ten requests in each system?
- How satisfied are requestors with the interfaces? How about the fulfillers?
- How satisfied are requestors with the service experience?
- How consistent and automated are the fulfillment processes?
- Are fulfiller groups able to improve their processes through measurable outcomes?
Engaging The Business

Understand ➔ Align ➔ Synchronize
Ohio State University

The Makings of a Modern Campus

In Closing…
THE NEW AGE OF SERVICE IS NOW.