

## Summary

Thanks to Javier Garcia Arcal for his reviews and comments in this white paper.

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## ManageEngine White Paper:

# How ITIL-based IT Help Desk can help Small and Medium Businesses

Contents	Page
<b>Businesses Must Grow, Not Problems</b>	2
<b>How ITIL Can Help SMB's</b>	2
<b>Steps To Implement ITIL</b>	3
<b>Implementing ITIL-Based Service Desk</b>	4
<b>Incident Management</b>	5
<b>Problem Management</b>	6
<b>Configuration Management Database</b>	7
<b>Change Management</b>	7
<b>Summary</b>	9

## Businesses Must Grow, Not Problems

Everybody knows Bob! Bob works in the IT department of a Financial Services company. When the Office staff has a problem, they call him and say, “Hey Bob, I have a situation here, Can you fix it”. Bob knows all the employees by name and their assets details. He fixes all problems and runs a great show. The business is going great and the company expands adding more employees providing them more IT Services. Can Bob still run the show? Let us see how ITILbased Help Desk Software can help Bob and businesses with a similar IT Help Desk team to run a great show.

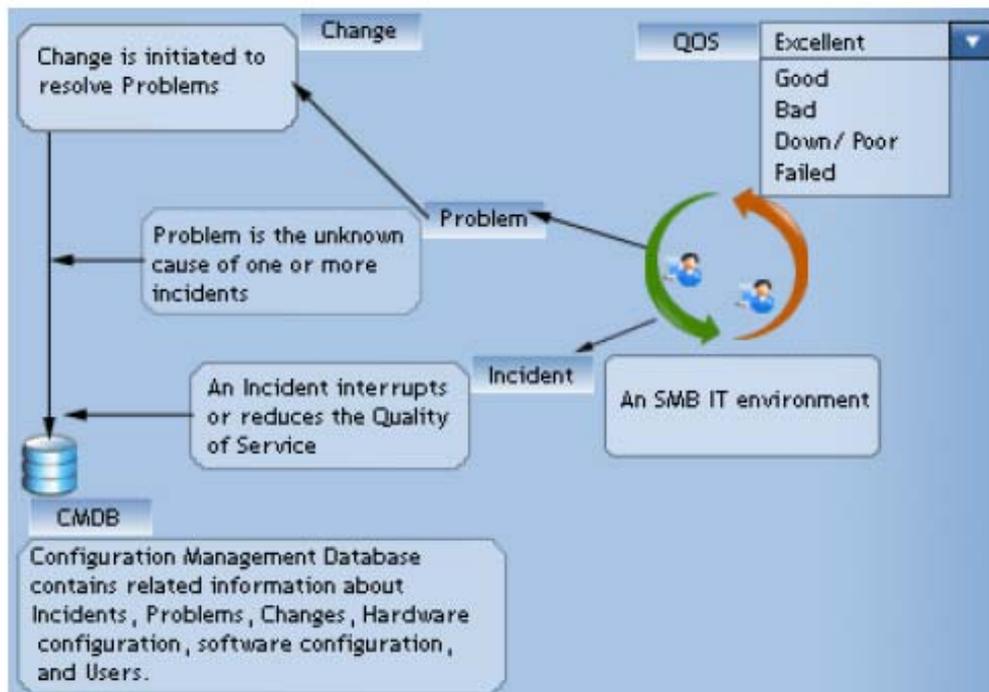
## How ITIL can help SMBs streamline IT Service Support?

Information Technology Infrastructure Library (ITIL) is a framework of best practices to manage IT operations and services. Government of Commerce, UK defined ITIL in the mid 1980s for business to efficiently manage their IT environment.

ITIL ‘s main objective is to align business and Information Technology. ITIL’s IT Service Support process helps organizations to efficiently manage software, hardware, and human resource services to ensure continued and uninterrupted business. ITIL defines that the core function of IT Service is to offer “uninterrupted and best possible service” to all users. It defines 5 processes such as Incident Management, Problem Management, Configuration Management, Change Management, and Release Management to offer uninterrupted and best possible service.

ITIL does not mandate enterprises and organization to implement all the framework specifications. This freedom to choose is one of the prime reasons why ITIL is still very relevant even today to enterprises of all sizes. SMBs need to have a cost savings approach to ITIL implementation; this approach helps them to adopt the right features without getting caught in standards-sake ITIL implementations.

Here is an illustration that shows how SMBs can manage an IT environment with an ITIL-based Service Support solution.



Consider an Office with users having IT and non-IT assets. Consider that IT and non-IT asset services are handled by the IT Support team and Quality of Service offered is at an excellent level. The *Excellent QOS* is an end result of the IT Support team and all the components such as IT, non-IT assets, and complete IT infrastructure functioning at their best.

As shown in the illustration, all requests from users are classified as Incidents and problems, a workaround is suggested to ensure that normal operations and services are not affected. Problems are traced to their root cause and a Change is initiated to eliminate problems and related incidents. Using ITIL's Incident, Problem, Configuration, and Change Management, the IT Support staffs continually ensure that all components perform at their best level, to contribute to the *Excellent Quality of Service*.

Most SMBs start with a modest email-based IT Support setup, but as they grow and as service requests increase, the quality of service drops drastically. The IT support team gets into a firefighting mode, just resolving requests to avoid service failure. Without ITIL, there is no vision to proactively identify and resolve problems before it affects service and business. ITIL provides the framework or the "common sense approach" to IT service support so that each issue is analyzed to determine the root cause. Finally, the root cause of the problem is eliminated to prevent similar problems in the future.

## Steps To Implement ITIL

- Make a clear plan of high-level goals to be achieved with the ITIL implementation
- Implement an ITIL-based Service Desk with Incident, Problem, Change, and Configuration Management

### Planning your ITIL Implementation

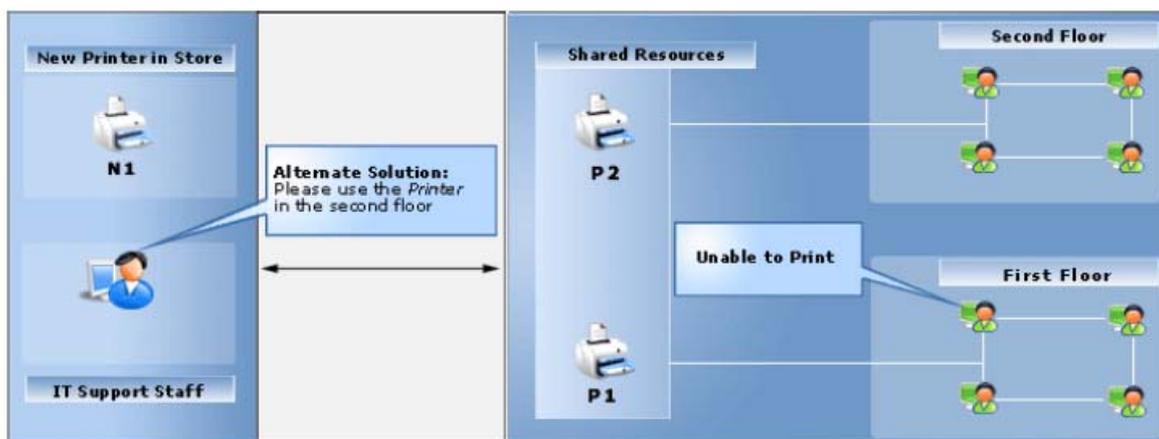
Enterprises need to plan ITIL implementation with clearly defined short term and long-term goals. This helps enterprises to stay focused on their vision with every step and on the whole move. A simple plan with the following key points can help SMBs to stay focused and implement ITIL successfully.

- What is the Vision?
- Where are we now?
- Where do we want to be?
- How do we get where we want to be?
- Check Milestones to ensure the organization is head towards defined vision.

<b>Define Your Vision</b>	<p>Define high-level objectives you need to move towards. These objectives can help you define and refine your goals.</p> <p><b>Example:</b></p> <ul style="list-style-type: none"> <li>• Move towards ideal minimal cost to provide the best &amp; uninterrupted services possible</li> <li>• Provide 99.9% service uptime</li> <li>• Provide new services to users and take services to the next level</li> </ul>
<b>Where We Are Now?</b>	<p>Take a baseline statistics of Key Performance Indicators. Track statistics and trends to measure KPI.</p> <p><b>Example</b></p> <ul style="list-style-type: none"> <li>• Total number of incoming call volumes</li> <li>• Total number of first call resolutions</li> <li>• Average Service downtime in a week, month, quarter, and year.</li> <li>• New services introduced</li> <li>• Service Support staff distribution taking level1, level2, and level3 calls</li> <li>• Total time spent by Service Support staff by level of issues</li> </ul>
<b>Where Do We Want To Be?</b>	<p>Define specific goals to improve on Key Performance Indicators based on the KPI statistics; define specific goals to improve service. This can be considered as short-term goals towards improving the service.</p> <p><b>Example</b></p> <ul style="list-style-type: none"> <li>• Reduce Incoming service calls by 40%</li> <li>• Increase first call resolution rate by 20%</li> <li>• Reduce the most frequent service outage</li> </ul>
<b>How Do We Get Where We Want To Be?</b>	<p>Implement ITIL process or part of the process to reach your short term goals</p> <p><b>Example</b></p> <p>To reduce incoming service calls by 40%</p> <ul style="list-style-type: none"> <li>• Implement a Self-service Portal with solution to common problems users can resolve themselves</li> <li>• To Increase first call resolution rate by 20%</li> <li>• Implement a Help Desk solution with asset management and network monitoring software to drill into problems and resolve them faster.</li> </ul>
<b>Check Milestones and Directions</b>	<p>Check Milestones and KPIs to ensure you are heading towards your vision</p> <p><b>Example:</b></p> <p>Define Timelines to check the impact of short-term goals on your KPIs</p> <ul style="list-style-type: none"> <li>• Check how many users logged in to Self-service portal to solve their issues and analyze how it reduced your level1, level 2 calls.</li> <li>• Check if your first call resolutions rates have increased</li> <li>• Analyze results from User Satisfaction Survey</li> </ul>

## Implementing ITIL-Based Service Desk

Enterprises can implement an ITIL based Help Desk for proactive IT service management and to reduce service downtime. Consider a financial services company with multiple teams of employees. Employees are spread across two floors and all employees have a workstation to run their applications. Employees access a shared resource pool of printers to print out cheques or transaction reports. Employees print cheques often as they sanction loans and provide financial reports to customers. Workstation or printer failure can be critical for business. Let us see how IT Help Desk staff can implement an ITIL-based Help Desk solution to identify and manage service requests, eliminate problems and provide uninterrupted service.



## Incident Management

When an employee sends a request saying that he is unable to print. There can be various reasons why he is unable to print, the service staff needs to ask the right questions to understand and pinpoint service problems. Here are a few possibilities:

### Right Questions

- Is the Printer configured in his machine
- What is the name of the printer he is configured to
- Are the required Device Drivers working properly
- Is the Toner Low in Printer
- Is the Printer out of paper
- Is there a Printer Paper Jams

### Right Details

- Requestor details
- Requestor location and network connected to
- Workstation details
- Hardware and Software installed
- Printer Status & Details
- Network Status & Details

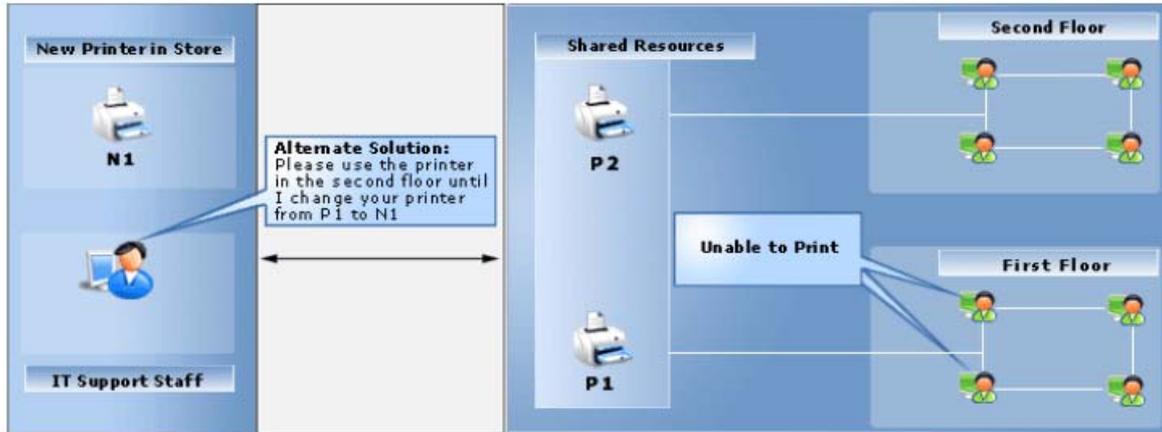
### Right Answers

All the information is pulled out from the requestor and the support staff gets back to the requestor with alternative problems to print by anyone of the following options:

- Directing the request to another functioning printer
- Configuring the printer
- Restoring the printer

**An incident is an event that it is not part of the standard operation. It interrupts or reduces the Quality of Service.**

In this instance a single user is unable to print, this affects the user alone and might not affect business in a big way. This event only reduces the overall QOS from Excellent to Good, so this event can be classified as an Incident.



## Problem Management

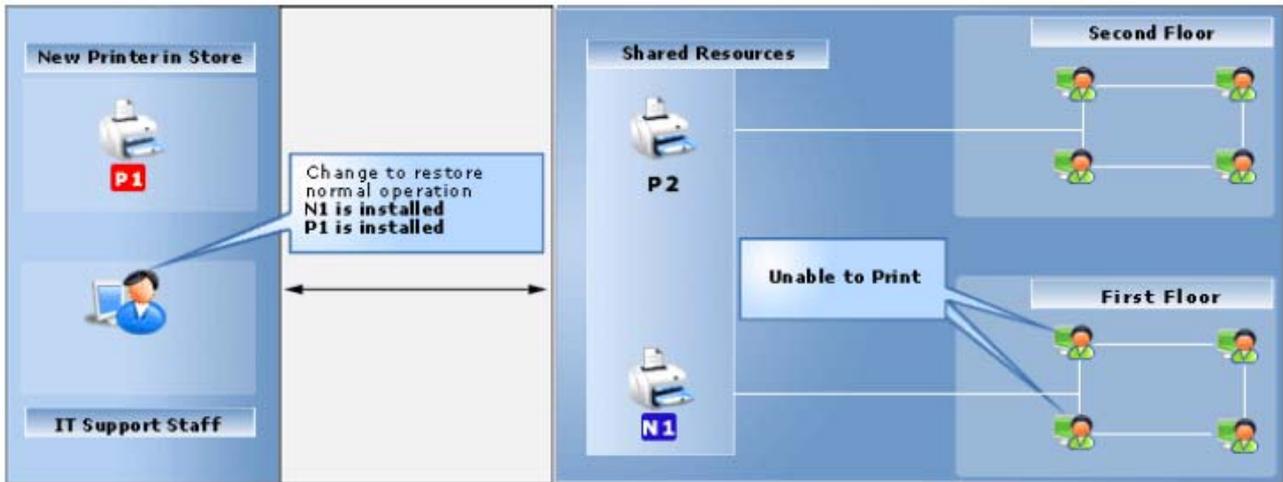
The Office operations are not affected in a big way by Incidents, as only a single employee is affected in this case. But when another employee or a group of employees send requests communicating that they are unable to print. This can be problem as all reported individual Incidents point to a single source. This might adversely affect business as a group of employees are affected. The Support Staff must provide resolve the situation to restore the QOS. After asking the Right Questions and getting the Right Details, the support staff zero in on the problem. Say if there is a printer malfunction that is causing the problem. The printer needs to be replaced and normal operation must be restored to affected users at the earliest.

Problems	Solutions
Printer not configured	Configure Printer / Provide detailed steps to configure printer
Printer Problems	Provide detailed steps to load paper, load toner, or clear a paper jam

The main goal of problem management is to find the root cause of the problem and eliminate all the related incidents. The Support staff can get back configuring the workstation or rectifying or by providing users an alternative way to print. The goal of problem management is find the root cause of the problem and to eliminate incidents and prevent further incidents related to the problem.

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## Configuration Management Database

The CMDB is one integrated database that contains all the details about employees, workstations, devices, incidents, problems, changes, and complete details of all the components in business. It provides a public knowledge base of *known errors* and solutions that help employees search and resolve minor incidents themselves without contacting the Help Desk. It provides private knowledge base for the Support Staff get detailed reports about all assets with problem history, work-around and temporary fixes.

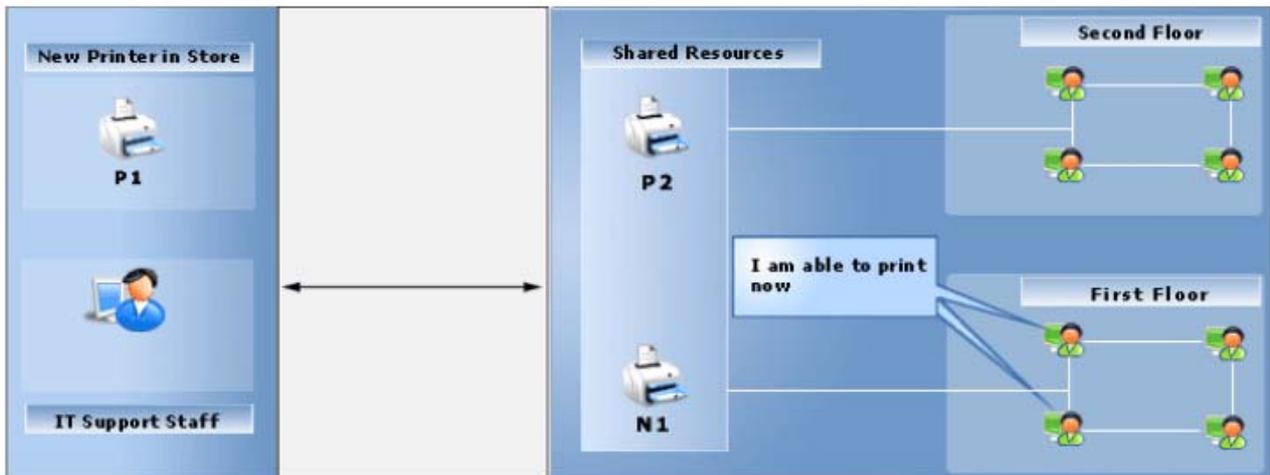
<b>Requestor Details</b>	<ul style="list-style-type: none"> <li>• Requestor Name</li> <li>• Requestor Contact Details</li> <li>• Requestor Location</li> <li>• Associated priority</li> <li>• Associated Workstations and assets</li> </ul>
<b>Workstation Details</b>	<ul style="list-style-type: none"> <li>• Location of workstation</li> <li>• Workstation type, manufacturer, vendor with complete request history</li> <li>• Workstation Hardware and software details</li> <li>• Complete associated inventory details</li> </ul>
<b>Associated Assets</b>	<ul style="list-style-type: none"> <li>• Associated assets details such as printers, scanners, and webcams.</li> <li>• Asset Status, availability reports, and problem history</li> </ul>

## Change Management

Now employees are given a workaround to print, still the problem remains and points to the printer. A detailed report with workstation and printer problem history from the CMDB shows that the printer has been failing repeatedly. To eliminate the problem, the printer needs to be changed and replaced with a new printer to restore normal services. A change is initiated to resolve a problem and a proposal is raised to replace the old faulty printer with a new printer.

A proposal to change printer is submitted for approval, the approver can be IT manager or COO based on the cost of purchase. A detailed plan is prepared to implement change with a roll- back plan acting as a safety net. After implementing the change, the requestor needs to verify that change was successful.

Steps	Explanation
<b>Proposal for change</b>	A proposal for change is planned based on the requestor’s information and problem history report of the printer. The proposal for change must state, why change is required now with complete details
<b>Evaluation of Change</b>	The change plan is submitted to the approver and with an implementation plan that ensures minimal downtime during change. Example, if a new printer is installed and it might require printer configurations in all machines. Support staff needs to ensure that change plan is implemented on non-business hours so that there is a minimal business impact.
<b>Execution of Change</b>	After the approval, the Change plan is executed
<b>Post Implementation Review</b>	After executing the change, approver(s) reviews the change to ensure it was successfully. Incase of an unsuccessful change the previous state is restored. If the change is successful it is approved
<b>Close Change Request</b>	Once the Requestors verify that implementing the change eliminated the problem. The change request is closed.



Enterprises can continually ensure excellent QOS by implementing Incident, Problem, Configuration, and Change management process to efficiently and proactively handle service requests.

## Summary

Growing SMBs with an expanding IT environment often struggle to provide uninterrupted IT services to users. Enterprises need to adopt a standards based solution to handle their IT services.

- ITIL can help IT support staff to control IT environment and provide uninterrupted IT Service at best QOS
- Enterprises must adopt a cost saving approach while implementing ITIL
- The Cost saving approach will help SMBs to plan and implement ITIL in the right way without getting lost in the standards
- “Chaos Management with ITIL” shows how enterprises can plan and implement ITIL to proactively handle issues using Incident, Problem, Configuration, and Change Management and maintain excellent QoS.

Getting back to Bob, ITIL can help Bob manage IT Services, no matter how big his IT environment expands. It can help Bob and his team, resolve problems faster and prevent a few from even arising.

### Source

*itSMF*: An introductory overview of ITIL

## About ServiceDesk Plus

ServiceDesk Plus implements most of the ITIL standards with an approach to solve business problems, reduce downtime for efficient Help Desk and IT asset management. ServiceDesk Plus offers compelling value for SMBs as it combines Ticketing, Asset Tracking, Purchasing, Contract Management, and Knowledge Management into one affordable package.

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