

Leading

A Successful ITSM Tool Implementation



NAVVIA

Welcome to the Webinar

Your hosts for Today



Cecile Hurley
Customer Success Manager



David Mainville
CEO & Co-founder

About Navvia

The Navvia Process Designer

The easiest and most cost-effective way to design, document and share processes

Used by great companies like...



Hi Everyone!



David Mainville

CEO, Co-founder, Navvia

- 37 years in IT
- ITSM Practitioner
- ITSM Consultant / Architect
- Manager
- Executive

Always looking forward to my next outdoor adventure!

When it comes to
implementing ITSM tools...

Its seldom the tool that's the problem..





The failure rate of IT projects is appalling...

... despite more than 50 years of history and countless methodologies, advice and books, projects keep failing...
irrespective of the methodology – waterfall or agile



Gartner – October 2014

So, if not the tool... then what?

- Out of the box
- Lift & shift
- Time pressure vs scope creep
- Poor requirements definition
- Biting off more than you can chew / unrealistic expectations

What issues have you seen in your career...





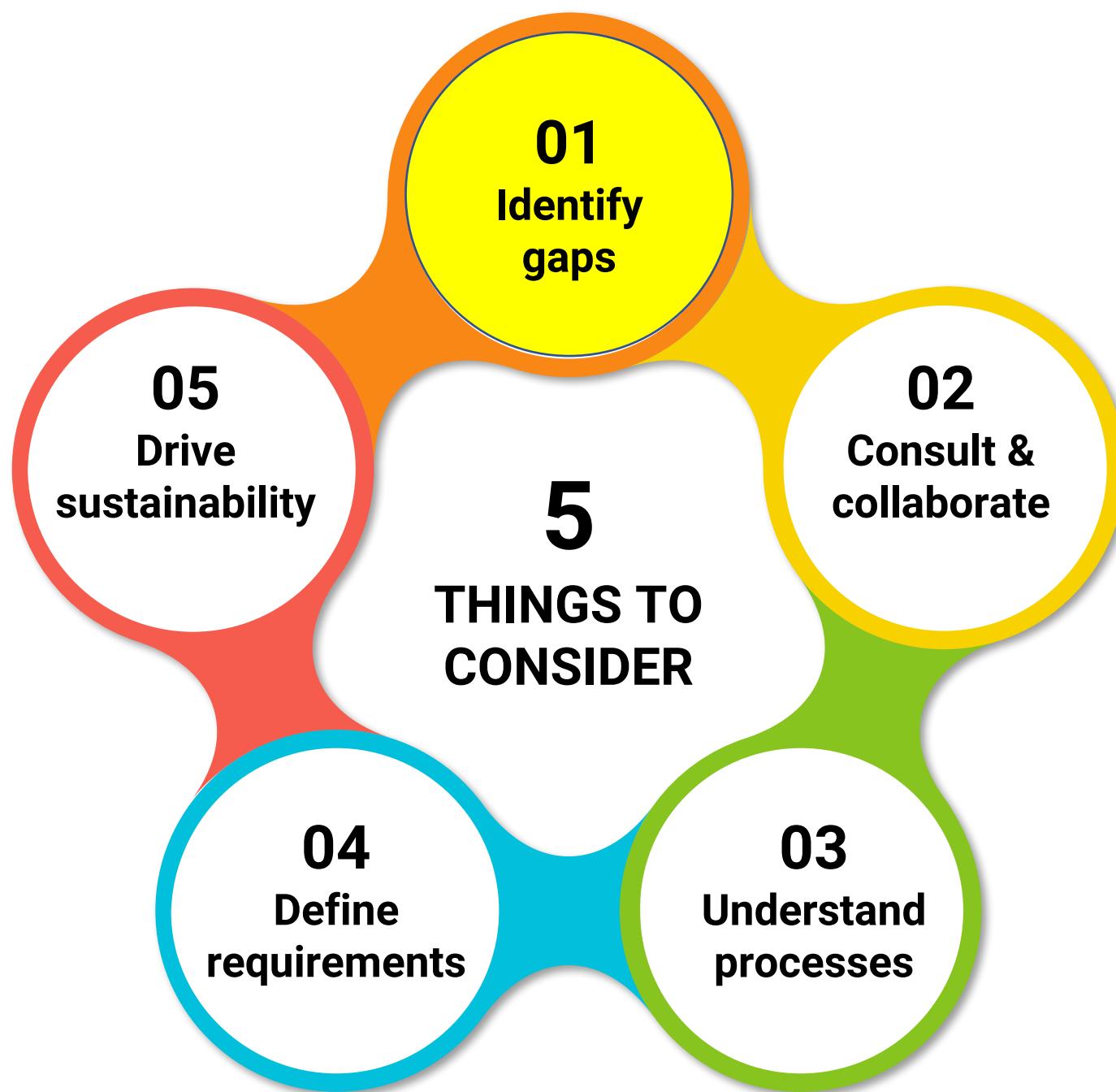






Everyone can (and should) take a leadership role

- If you are an executive sponsor listen to the advice of your team over that of the vendor
- If you are a program / project manager remember Brooks' law "When a product is crashing, burning and delayed, throwing more people at it only makes it crash harder, burn faster, and be more delayed".
- If you are a stakeholder make the time to contribute – it's your opportunity to shape the outcome
- If you are a process lead make sure the process is focused on improving business outcomes over adhering to process dogma
- If you are a tool specialist / developer resist the urge to jump in and start customizing screens and fields – remember you are automating a business process



Poll Question

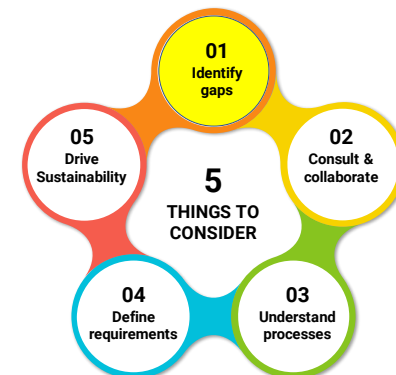
How do you evaluate the capability of your processes?

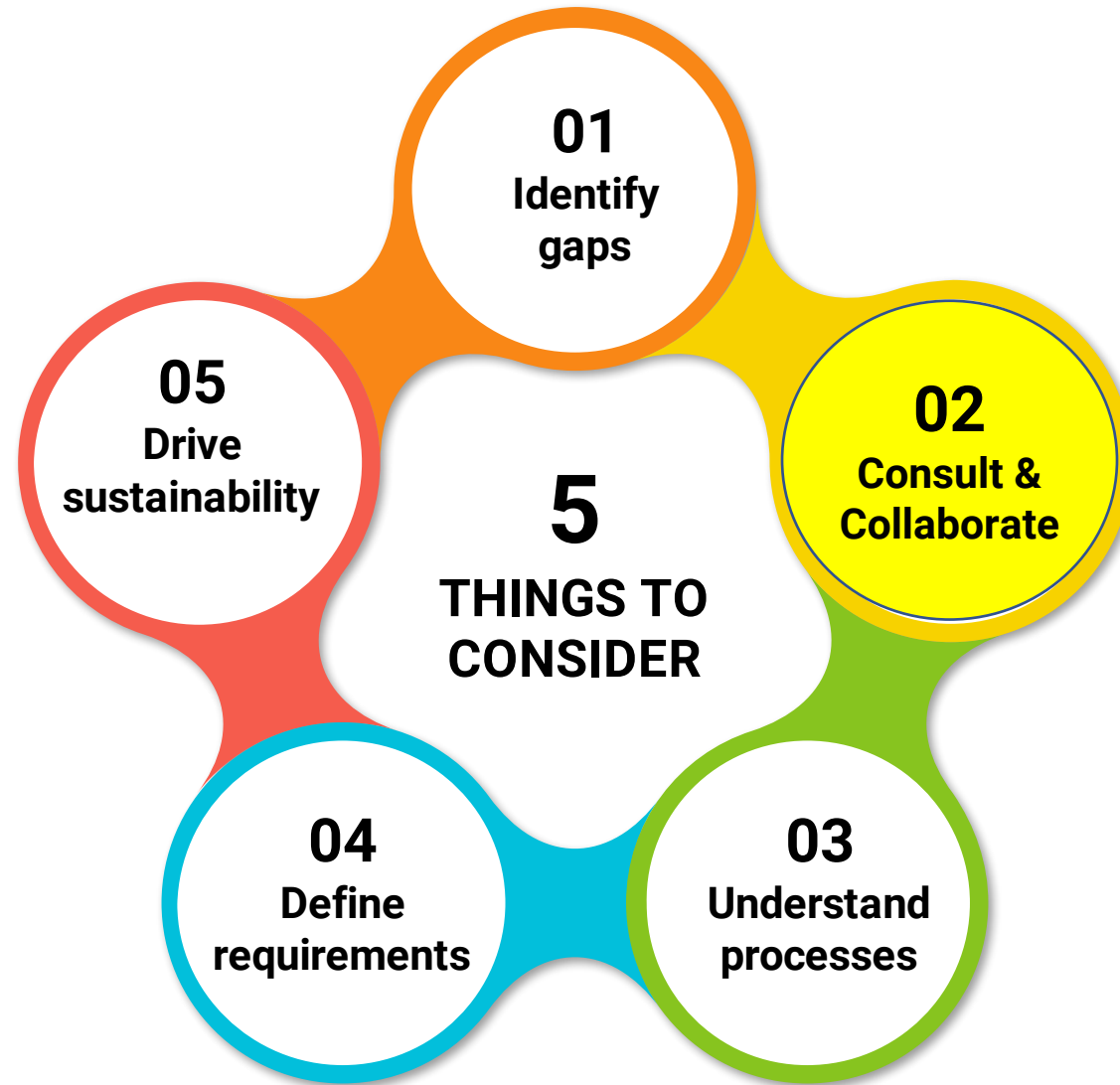
- A. We formally assess & report on process capability
- B. We conduct informal reviews of our processes
- C. We inherently know what's wrong without need for review
- D. We do not evaluate our processes



Identify Gaps

- What are the business outcomes you are trying to achieve?
- How do your existing processes / tools contribute?
- What are the pain points?
 - Service requests too slow?
 - Change requests too complex?
 - UI too confusing?
- Get out and talk to the users...don't make assumptions
 - Use combination of interviews, workshops and questionnaires

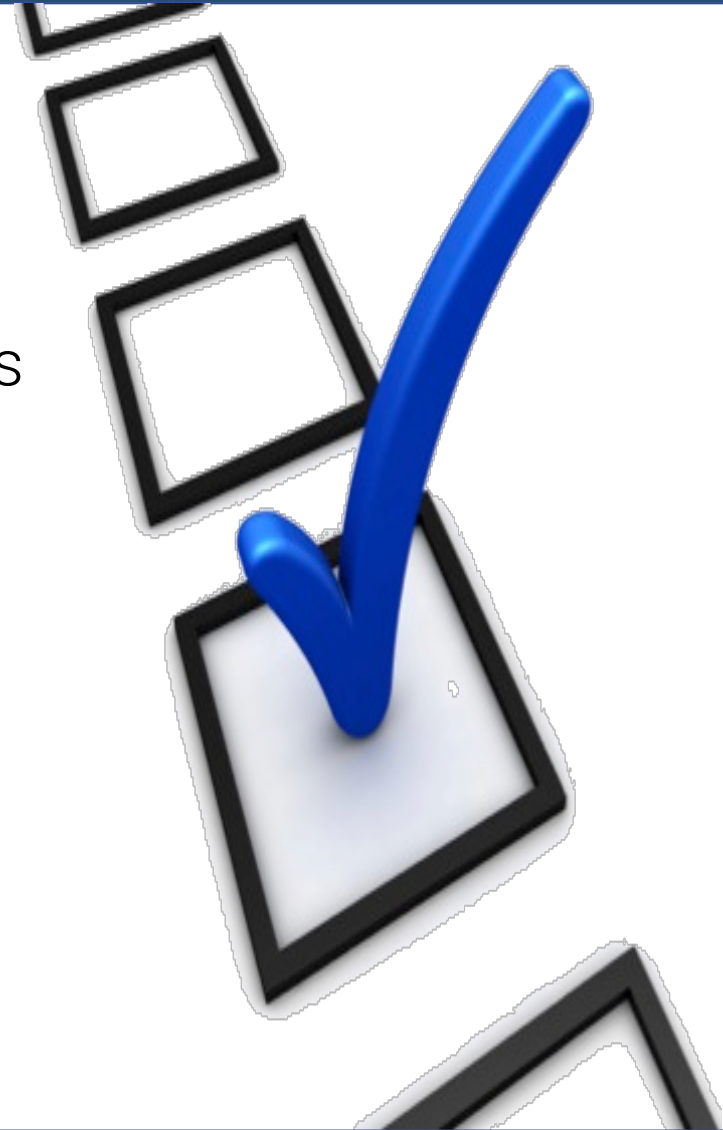




Poll Question

When implementing new ITSM tools...

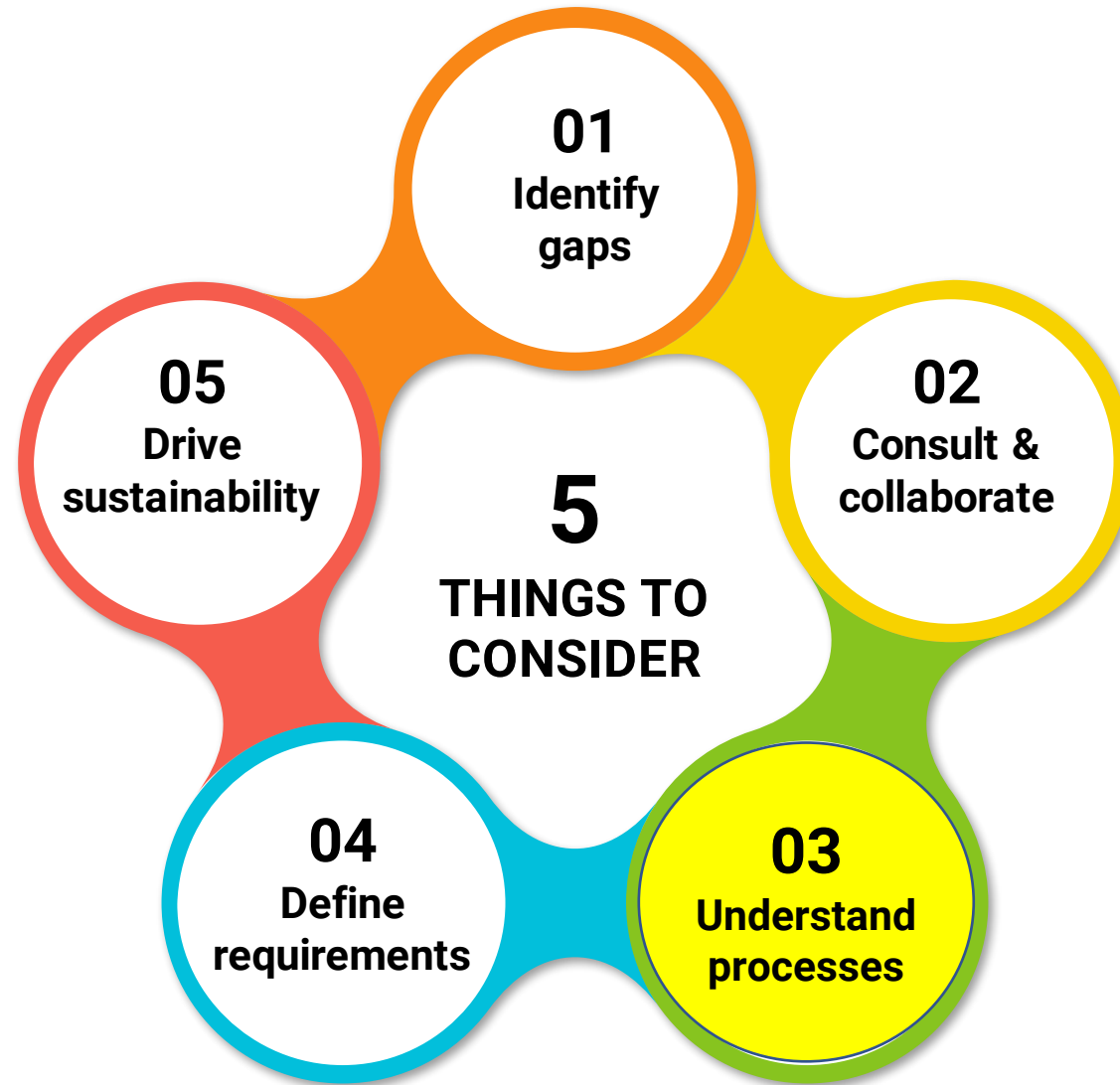
- A. We build a team that includes all IT & business stakeholders
- B. We bring together a team from within IT
- C. We create a small team of internal subject matter experts
- D. We rely on vendor/consultants to drive implementation



Consult & collaborate

- Involve the stakeholders in the design
 - They understand the processes & requirements better than you do
- Collaboration mitigates resistance to change & drives adoption
 - Make the stakeholders part of the solution
- Communicate “what’s in it for me”
 - Which differs from one stakeholder to another
- Get the right people involved
 - Core team, SME, stakeholders and steering committee





Poll Question

Our IT processes are...

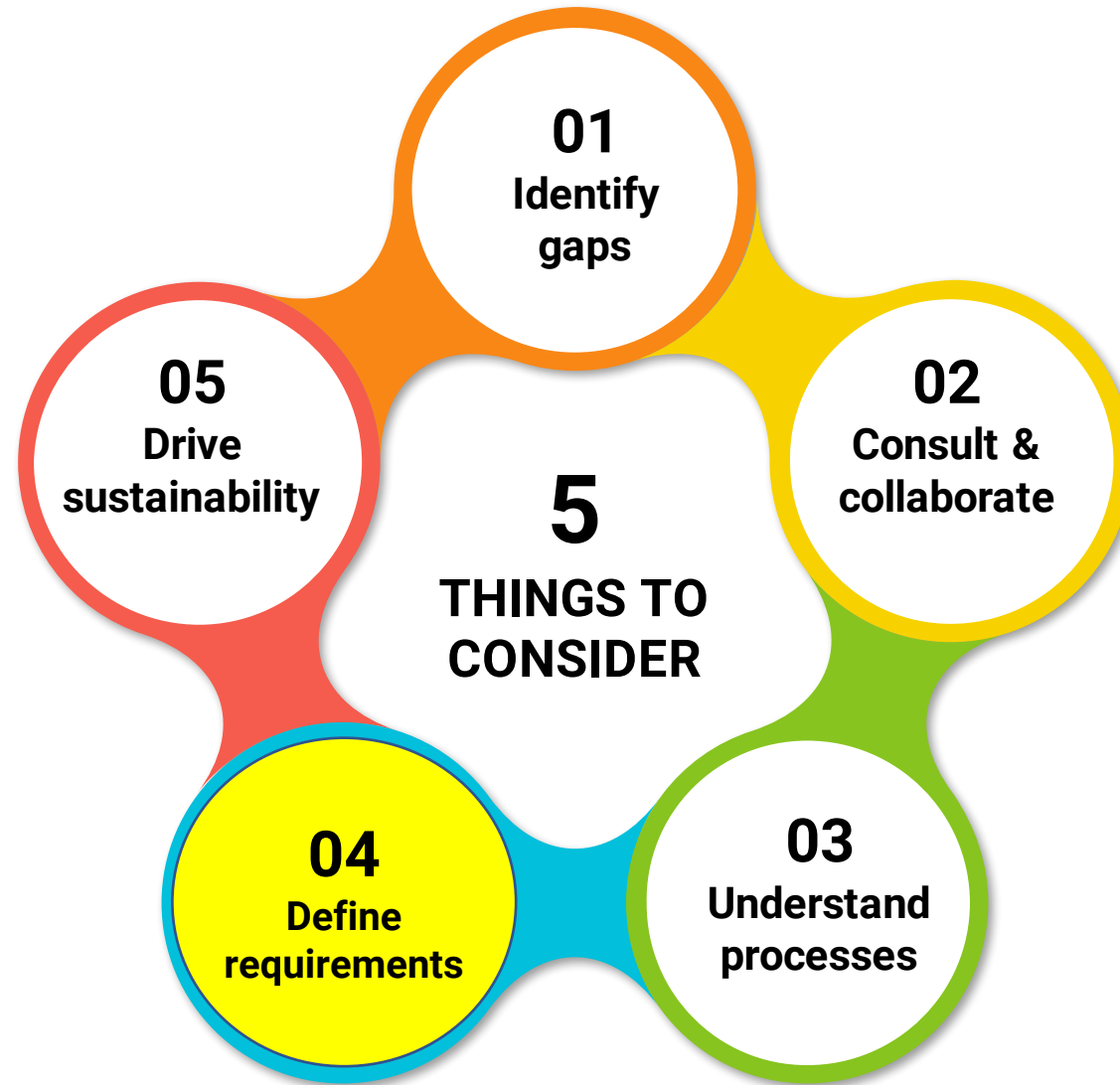
- A. Well defined, owned, managed and continuously improved
- B. Inconsistently defined and / or managed across groups
- C. We rely primarily on departmental procedures
- D. Process, what process?



Understand your processes

- Identify the process owners & managers / make them accountable
- Discover what is done today and what needs to be improved
- Distinguish between processes and procedures
- Get consensus on a documentation standard
- Establish a central repository / single source of truth for processes
- Keep process diagrams simple to enhance understanding
- Create contextual documentation
- Build living documents

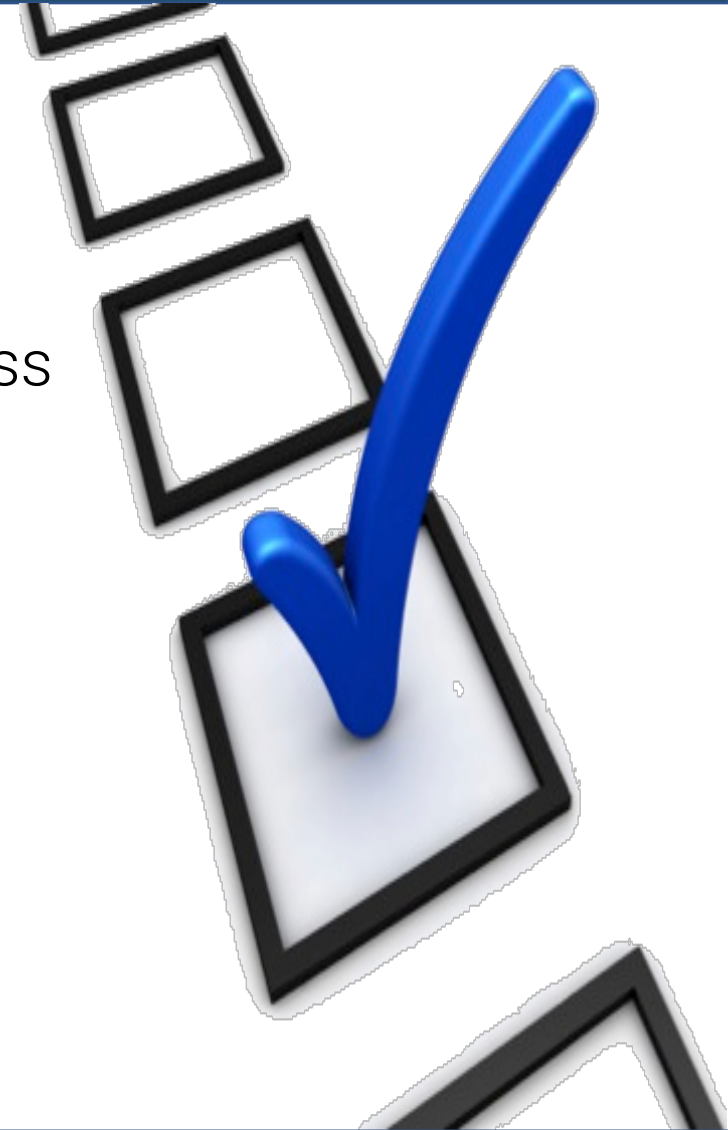




Poll Question

When it comes to defining requirements

- A. We solicit REQS in business terms directly from the business
- B. We focus on soliciting technical requirements from SMEs
- C. We let the tool drive the automation requirements
- D. We let vendor/consultant drive requirements

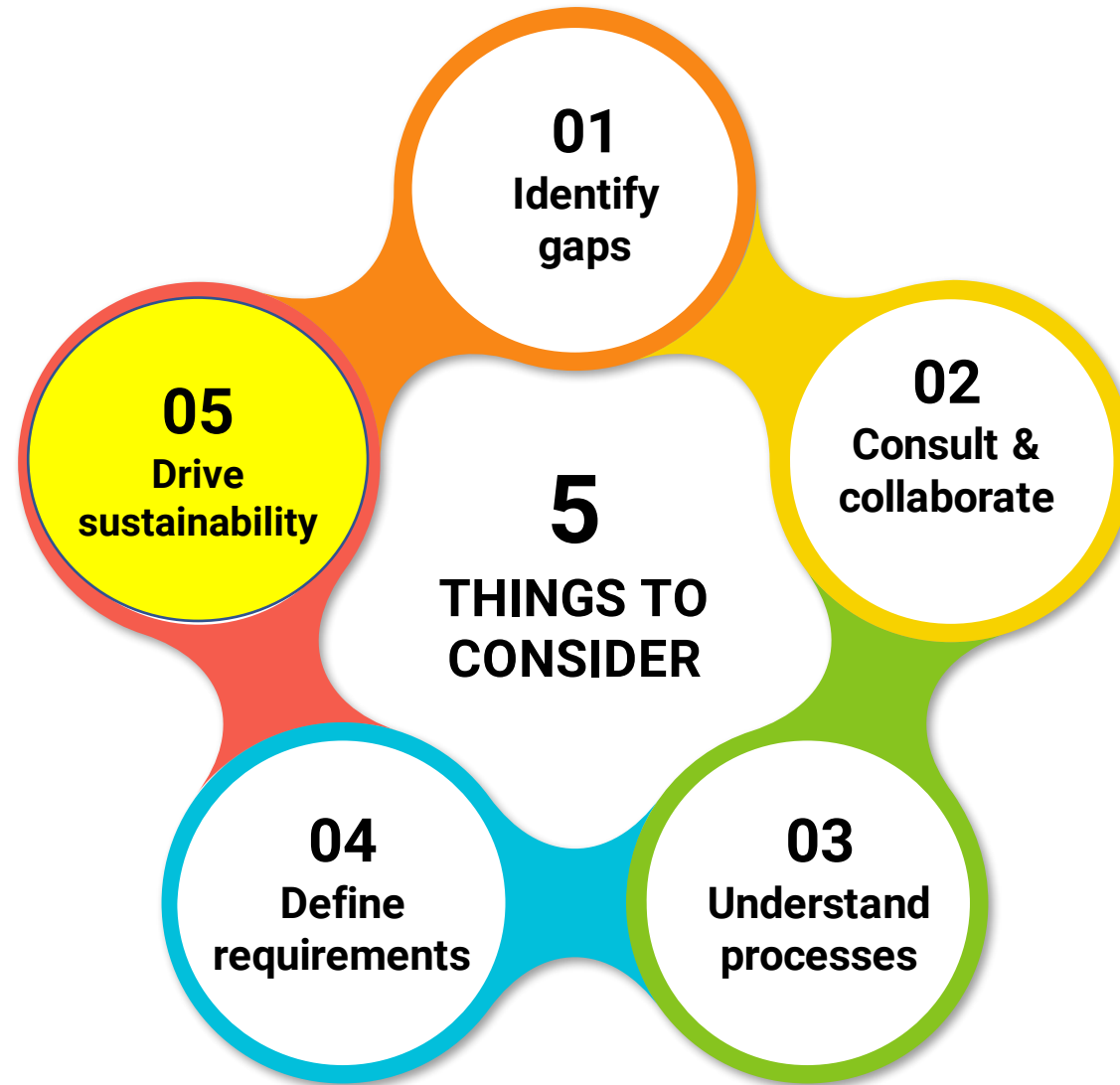


Define requirements

As a <persona>, I want <feature>, so that <benefit>.

- Create personas for each category of user
- Describe features in business, not technical terms
- Ensure all your personas are considered when developing requirements
- Capture role / persona requirements in "stories"
 - As an unauthenticated user, I want to see the login link in the upper right hand corner of each page, so I don't need to navigate back to the homepage or some account page to login.
 - As a sales associate, I want to be able to pull up my current active leads, deals and tasks on my iPhone, so that I can still follow up with clients and update deals status while traveling.
- Roles / personas, and associated stories, are critical for testing





Poll Question

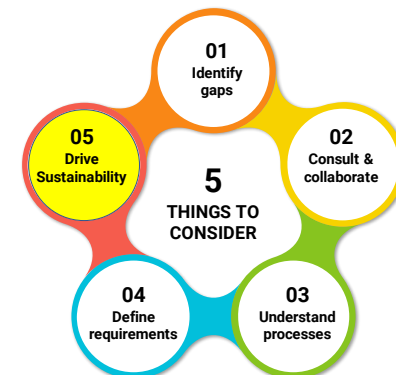
Regarding the sustainability of your processes...

- A. We actively monitor, govern and proactively improve
- B. Improvements tend to be reactive
- C. We are not focused on process improvement
- D. We blame the tool and look for a new one



Drive Sustainability

- Build control objectives into processes and track compliance
 - Work with auditors to build the right controls, policies and metrics
- Metrics
 - Its better to have a few actionable ones vs metrics for the sake of metrics
 - Metrics need owners
 - Ensure data for metrics is automatically captured by the tool / reports generated
- Accountability
 - Reward positive behavior and call out bad performance
- Use training to drive adoption
- Establish a formal governance & review approach
 - People, process & technology
 - One option being a Service Management Office



Summary: Leading A Successful ITSM Tool Implementation

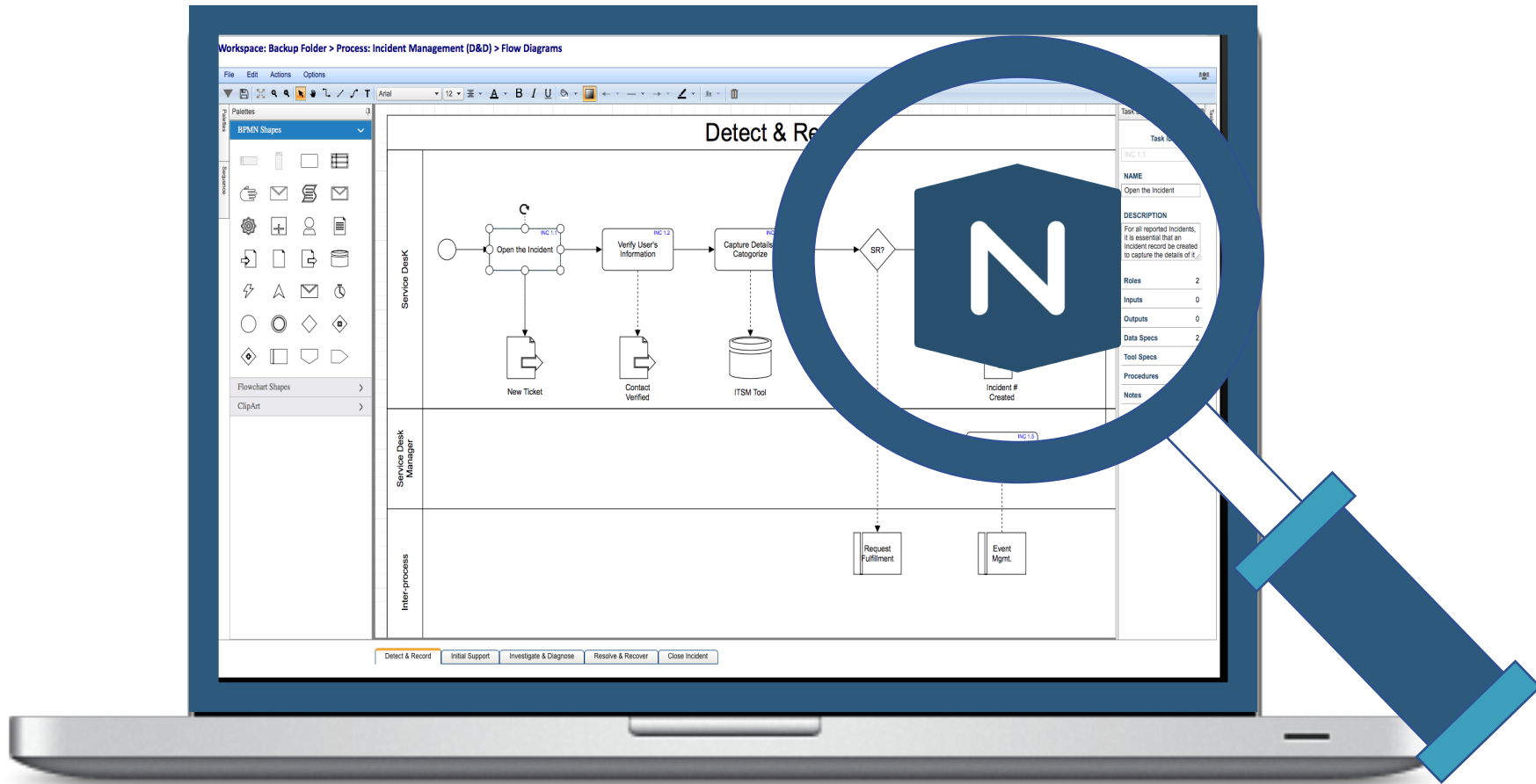


Summary

“Success is more about People & Process than it is about the Tech”

- Don't fall for “out-of-the-box” or other “quick fixes”
- Take a leadership role and provide guidance on “doing it right”
- Implement based on business objectives and closing gaps
- Collaboration is critical - you can't do this in a vacuum
- Don't ignore processes – that's what you are trying to automate
- Develop requirements based on user stories and personas – not tool driven
- Build sustainability into your implementation (or risk having to do it again)

Quick Demo



Want to learn more?

Register for our weekly demo

Navvia.com/demo



Thank you!

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