



Ten Most Pressing IT Service Management Leadership Issues

Where Do Directors of Service Management Feel Urgency to Change the Status Quo?

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|---|--|----|--|
| 1 | Service Catalog Content and Structure | 6 | Facilitating Chargebacks |
| 2 | Service Level Agreement Creation and Enforcement | 7 | Promoting Service Across IT Units |
| 3 | Help Desk Operations | 8 | Asset Management and Automated Maintenance |
| 4 | Selecting and Training Student Employees | 9 | Access Management |
| 5 | Service Management System Administration | 10 | Accessibility Policies and Services |

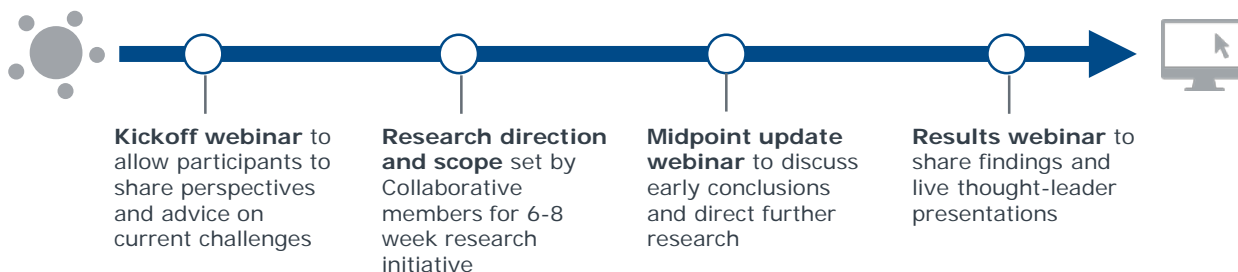
Introducing Functional Collaboratives

Giving Voice to IT Director Issues

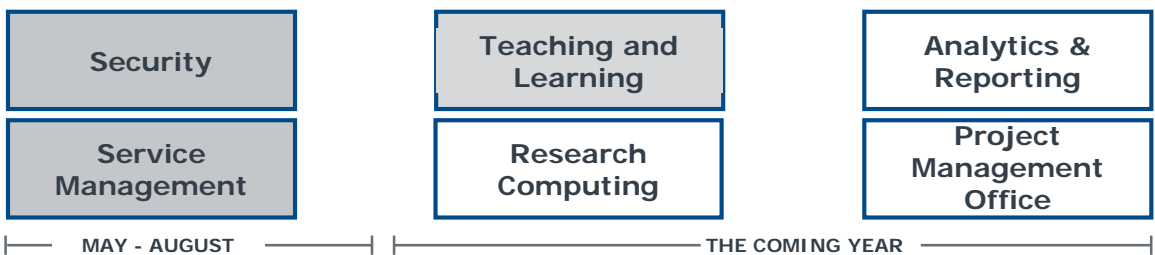
Responding to CIO encouragement to help rising IT leaders expand their peer network and share advice on “live” issues, the Forum is delighted to launch our new membership service: IT Functional Collaboratives. They’re designed as cohorts of 10-15 director-level higher ed IT professionals that the Forum convenes virtually for a roundtable discussion to share “pain points”, calibrate campus policies, and compare assumptions about emerging technology rate-of-approach and change management strategies. In contrast to peer groups in state systems and industry associations, which are often successful at defining high-urgency questions but lack capacity to research answers, Functional Collaboratives will pick the handful of issues of broadest interest for an 8-week research effort culminating in short reports profiling innovative practitioners or aggregating reusable planning and communications IP.

Over the next membership year, the Forum will start Functional Collaboratives for the major boxes on the IT organizational chart. This report profiles first findings from our second Collaborative, serving service management leaders.

Timeline of a Functional Collaborative



Functional Collaboratives Launching across 2017-18



What's Keeping IT Service Management Leadership Up at Night

All the Perennial Service Management Issues Still There

Each of the ~50 service management leaders participating in the Collaborative took shared their particular pain points (and victories) on their campuses. Without fail, they began by reiterating the shared, likely perennial challenges of the service management role: expanding a service mindset to IT staff not specifically tasked with service management, partnering with unit-based staff to provide frictionless service, and an ever expanding portfolio of services they are expected to provide, with flat or declining budgets. In spite of their clear-eyed assessment of the challenges that follow from these issues, service management leaders are always eager for new approaches.

New (or Newly Urgent) Issues Now Arising

Beyond these perennial issues, Collaborative participants were eager to see if others were spending more time and mindshare on challenges of emerging importance, which standard operating procedures aren't fully prepared to handle. From the hundreds of perceptive comments across our webinars, a common list of shared challenges took shape. Again, these are not necessarily the most important service management issues, but they are the ones where members are most eager to to compare notes and learn from each other.

Ten Pressing Higher Education ITSM Leadership Concerns

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#1 Service Catalog Content and Structure

The point of a service catalog is to speed resolution of a request. Without a considered approach to maintenance and structure, service catalogs will collect dust rather than help in this task.



We want to create something that campus will use, but we're also tackling questions of the balance between how to get help quickly and the breadth of services. For example, should we have a single service catalog that includes HR and Finance, or separate ones for each division?"

Director of Service Operations
Private Research University

Demands on Service Management Require End User Empowerment

An environment of constantly changing technical needs creates a deluge of requests for service management teams. At many campuses, there is an expectation that IT staff will support any device or tool, whether purchased by the institution or not. This growth in support requests is compounded by constant updates from vendors that lead to additional requests from end-users.

To maintain high quality service, and allow time for more complex requests, leaders in service management are introducing more self-service strategies, which often start with a visit to the service catalog. But a service catalog that is incomplete, infrequently updated, difficult to navigate, or filled with jargon will discourage utilization and fail to lower resource consumption.

Develop Service Catalogs that Promote Self-Service



Determine what units to include: On many campuses, the question of how far to expand the range of services in the service catalog is a pressing one, as other units push for inclusion and the creation of a single portal or an administrative “one-stop shop.”



Increase accessibility with clear language: Negotiating shared terminology between IT units can lead to jargon-heavy descriptions of services. Sample definitions and solutions that typical campus members can understand further goals of self-sufficiency and decreased reliance on IT professionals.



Engage campus in development: Service management leaders are working to gather meaningful input from end users without relying on endless focus groups. The emergence of user experience audits identifies service “chokepoints,” which highlights areas in need of changed or remediated services.

#2 Service Level Agreement (SLA) Creation and Enforcement

Service management leaders recognize that managing to SLAs holds staff accountable and drives both trust and utilization of IT services. However, many ITSM leaders rarely review their performance in relation to their stated SLAs or consistently discuss them with staff.



We have SLAs but they aren't monitored or managed. We just talk about expectations without measuring them."

Support Center Manager
Public Research University

A Drive Towards Accountability

Service management leaders recognize that SLAs that are communicated to stakeholders, and then used as operational goals, build trust in units across campus and that ultimately, the service and credibility that SLAs engender decreases the likelihood of shadow processes developing within units. This metrics and accountability posture is growing in importance as more institutions move to funding models that include chargebacks for IT services, which increases the scrutiny of service quality from customers.

Where Service Management Leaders Want to Compare Notes



What are SLA benchmarks Across Higher Ed: What SLA targets have other universities selected to align with institutional mission? What are the target response times for different services at other institutions? How often do other institutions meet those targets? What metrics do they collect to evaluate performance?



How do you enforce without micromanaging: How do managers at other institutions balance SLA enforcement and employee autonomy? In an environment where SLAs are not currently monitored, how can we most effectively introduce enforcement without disrupting employee motivation? What are the consequences for employees or units that consistently fail to meet targets?



What can encourage consistency: How many separate SLAs do other service management organizations have, and how do they track them? How standardized can you make an SLA? What carrots and sticks have been effective in discouraging service customization for each unit?

#3 Help Desk Operations

Campus communities are becoming more geographically dispersed, either through online reach or global student populations. This expanding reach is forcing service management leaders to contend with demands for a multi-time zone and 24/7 helpdesk.









When study aboard was our only population outside Central Time Zone we felt comfortable with limited help desk coverage. But now with campuses across the globe and online students we need to figure out 24/7 support."

Director, IT Service Management
Private Master's University

Anytime, Anywhere?

Increased enrollment in online courses and an expanding university presence in other countries forces helpdesks to reevaluate their hours of operation and modes of interaction (e.g., in-person, email, online chat) with campus users. Often, this request for expanded access comes without additional resources, and service management leaders must determine which modes of communication they will continue to offer, and which to stop offering to reallocate resources.

Wanted: What are Others Doing? National Help Desk Benchmarks

-  What are average helpdesk hours of operation?
-  What are the modes of interaction for the campus community to contact the helpdesk?
-  What trends have you observed in mode of interaction preferences with the helpdesk? Which have grown or shrunk in popularity? What modes have you introduced in the past 2 years, and which have you discontinued?
-  What Tiers of support does the helpdesk provide? What percentage of tickets fall into each of those Tiers?
-  How many FTEs does the helpdesk employ? How many of those staff are student employees?
-  Is some or all of the helpdesk outsourced, and if so to whom? If you have outsourced part or all of your help desk what factors contributed to that decision? What was the process to implement the change?

#4 Selecting and Training Student Employees

With an innately transient workforce, all of the staff management challenges related to recruitment, training, and motivation grow exponentially.



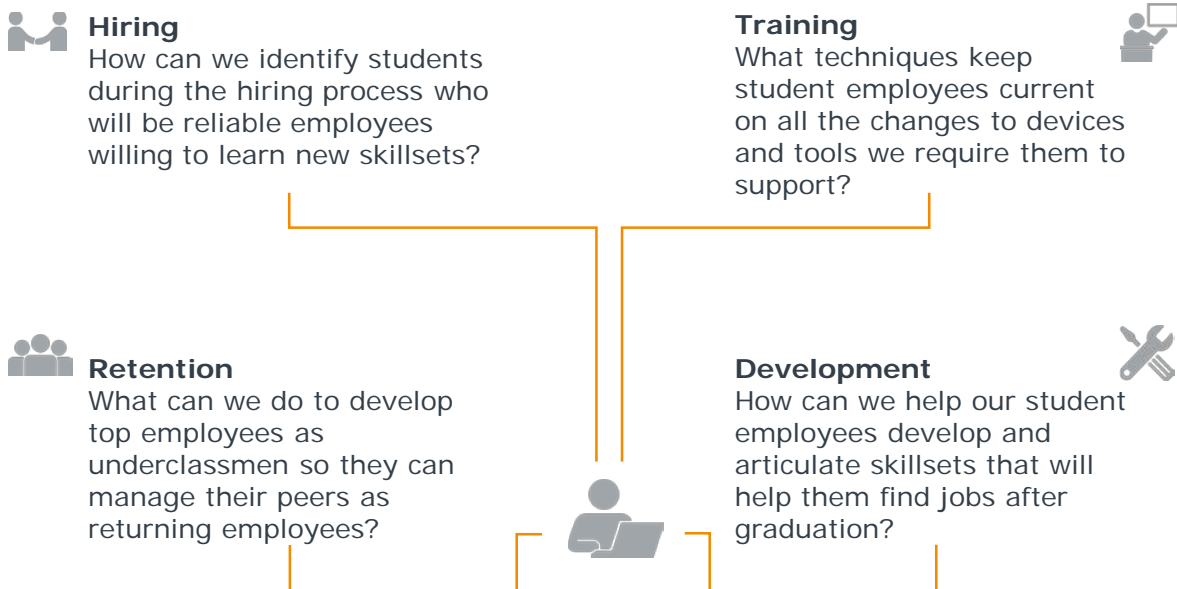
*How can we train student helpdesk workers on constantly evolving technology, **and** make sure we can provide coverage when they disappear for midterms or finals?"*

Associate CTO
Private Master's University

Stabilizing a Revolving Door

Student workers are a staple of IT service management, in particular as staff for helpdesks. Benefits to the institution include easy access to a pool of potential employees, some familiarity on their part with institutional culture and processes, and relatively low-cost labor. But service management leaders would like help improving the effectiveness of their student workforce by enhancing their ability to identify reliable and qualified candidates, keep their training up to date, and build leadership capabilities in underclassman.

Strategies to Build a Sustainable Student Workforce



#5 Service Management System Administration

What are the pitfalls to avoid and the implementation tips to embrace when selecting a service management system vendor, implementing a new system, or sustaining momentum for subsequent module roll outs.



We've stretched our current ticketing system to the limits, but we can't get it to the level of sophistication we require in term of metrics we assess and tracking the complexity of services we provide without a service management platform."

CIO
Public Master's University

Avoiding a "Silver Bullet" Mentality

The decision to implement service management platform is a cause of excitement among service management leaders. Expanded capabilities can facilitate streamlined metric collection and seamless transitions of requests and service tickets between departments. But a rollout that doesn't consider the needs of campus, nor a through communications strategy, will fail to increase utilization and lead to low adoption.

A Ticketing System Roadmap



Which System do We Choose?

- How can we make the case for funding to campus leadership?
- What factors (e.g., cost, existing staff expertise, timeline to implement, capabilities, vendor support, integration with existing systems) led to the selection of a vendor at other institutions?
- Who can we talk to that has recently made this decision?



How do We Rollout to IT and Campus?

- In what order should we introduce new modules?
- What staff and financial resources should we expect to dedicate to implementation?
- What communication strategies are most likely to increase adoption of the new tools?
- How do we build process redesign into implementation?

#6 Facilitating Chargebacks

Greater transparency in terms of the services provided is increasingly non-negotiable. Transparency into resource consumption and value-creation is in the costs of those services are critical in a cost-focused (and resource-constrained) environment.



We're moving to a budget model that requires chargebacks and I have to figure out how much it costs to offer the services we provide, and what to include in the charges for those services."

Director of IT User Services
Public Master's University

IT Solutions – At a Cost

In an environment of flat or declining funding for higher education, many institutions have transitioned or are transitioning to a responsibility center management (RCM) or RCM-lite budget model that requires IT to charge other units for services. Even at institutions where budget models are not changing, there is increased scrutiny on the costs of each service and that data is informing future resource allocation decisions.

Comparing Expectations for Costs and Services



Gather Data to Establish Baseline: With outdated ticketing systems and inconsistent data collection, we may struggle to even determine the cost to offer services. We want to understand both the initial and ongoing costs of a service as well as the staff time to provide that service.



Norm Against Other Institutions: What are average administrative overhead and institutional subsidies that other institutions offer? (ITSM leaders hope to rationalize their needs in the context of similar institutions to mitigate pushback from central finance and units.)



Communicate Costs and Services: ITSM leaders reposition early service management communication regarding costs and service expectations to mitigate grumbling or negative feedback from units. Examples of effective communication and case studies of budget model transitions help leaders struggling with resistance to a “fee for service” model.

#7 Promoting Service Across IT Units

Formal mechanisms, such as operational-level agreements (OLAs), as well as informal culture change strategies are necessary to ensure quality of service in decentralized environments.








When a student, staff, or faculty member has a negative experience with an IT unit they don't differentiate between central IT and the unit that lost their ticket and never responded. IT is IT in the mind of campus. We need everyone to value user satisfaction."

Manager of Desktop Support
Public Master's University

Hardwiring Internal Accountability

Even at institutions that use SLAs to hold members of the IT service management team accountable for service quality, OLAs for other central IT departments and IT units across campus remain elusive. And enforcement mechanisms are critical in environments where it is not uncommon for IT staff outside of the service management team do not identify with a customer-first attitude, or where IT staff will fulfill tasks outside of their roles to satisfy a customer when they should ask for support.

Building an OLA Repository

-  What departments or units does service management have OLAs with?
-  What is the structure for the OLA? What templates are available to kick start these on my campus?
-  Who is responsible for monitoring the OLAs and holding department and units accountable? Which units provide the resources for this monitoring?
-  What are the consequences for failing to meet OLA requirements? Who enforces these penalties?
-  Are there any incentives incorporated into OLAs for exceeding targets? If so, what are they and who provides resources for them?

#8 Asset Management and Automated Maintenance

Service management leaders want to easily identify and track technology assets on campus continually, monitoring those assets for emerging service and maintenance needs through automated ticketing or notification systems.



Effective technology forecasting allows us to determine what we'll need to replace in the next 10 years and how much that will cost – and if we can collect data and automate maintenance it will only increase accuracy and decrease costs.”

AVP for Enterprise Service
Private Research University

Polishing the Crystal Ball

Successful asset management contain a full programs inventory technology on campus- tracking when it was purchased, its expected lifespan, and annual replacement and repair costs. But more sophisticated programs that link campus technology, including campus-issued personal devices, classroom technology, and building management systems to ticketing or notifications capabilities allow institutions to begin providing proactive maintenance. This just-in-time maintenance improves staff efficiency and customer satisfaction through improved planning.

Building Blocks to Automation

Identifying Assets

At some institutions, decentralized procurement or unenforced procurement policies mean that service management leaders have an inaccurate or incomplete record of technology on campus.

Share information about effective ways to retroactively identify purchases, and to enforce policies in the future.

Forecasting Resources

Predictive models to estimate the timeline for technology refresh or maintenance programs help service management leaders allocate budget and staff time accordingly.

Provide and analyze model forecasts from other institutions, including estimated lifespan on technologies and calculated resources to replace or maintain them.

Automating Updates

Connecting technology to a system that generates automated notifications or tickets for maintenance and replacement expedites service and business planning.

Identify strategies used to build campus buy-in and highlight creative applications of automation to inspire further innovation.

#9 Access Management

To move beyond the less efficient and less secure practice of case-by-case access determinations, many institutions have moved to role-based access (a commonality in private industry).







Data access is the new password reset – it's taking dedicated staff that we just don't have in our current environment to determine and update permissions."

Director of Technology
and Client Services
Public Master's University

A Delicate Balance

In higher education, arguments abound for both high security and broad access to institutional data and other resources. Resistance to processes that limit access can lead to staff storing data locally, and possibly insecurely. To balance security and openness, institutions typically approve data access on an individual-by-individual basis. This is, unfortunately, both slow and inefficient. At some institutions changing access permissions requires a full-time employee dedicated solely to task, and in many instances end users wait from two to four weeks for updated access.

Streamlining Access

-  What are the most powerful and easily implemented methods for segmenting confidential data from public data?
-  How many different segments can we support?
-  What is current and aspirational role-based ID management? How can we implement this on our campus?
-  How will role-based access change the resources we spend on data access? What will the effect be on customer satisfaction?

#10 Accessibility Policies and Services

The threat of lawsuits has incentivized institutions to create policies to encourage websites' compliance with the American Disabilities Act (ADA), but in a decentralized environment enforcing that compliance is difficult.



High-profile suits have reminded us that ADA compliant websites aren't just the right thing to do, they're also a risk if policies aren't consistently ADA compliant across all university-affiliated webpages."

AVP Client Services
Public Research University

Fighting the Hydra

The risks of decentralized website management present in innocuous ways, such as inconsistent information and branding, and in higher-stakes behaviors such as non-ADA compliance. At institutions there are dozens, even hundreds, of staff with web editor responsibilities, meaning they all have the power to add or change content on institutional websites. Communicating risks, providing training on policies, and determining funding models for institutional tools that deliver capabilities such as closed captioning are critical to encourage adherence across the institution.

Scaling ADA Compliance



Institution-wide Policies

Sample policies from other institutions provide language regarding ADA-compliant design and content. Cost benefit models detail the scope of compliance, and generate ideas for enforcement strategies.



Web Editor Trainings

Presentation templates, training schedules, and sample emails to web editors across campus highlight effective communication to frontline staff who update institutional websites.



Funding Models

Benchmarks for departmental chargebacks or institutional subsidies for tools or staff required to comply with the ADA help set expectations for the cost of compliance and help service management leaders advocate for additional resources.

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