Project Remedies Inc.

Implementing Project Oriented Customer Service

Creating a seamless helpdesk to project response capability while reducing costs

A White Paper from Project Remedies Inc.

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Project Remedies Inc.

Table of Contents

Abstract

This is a how-to paper focusing on the process and tools needed to implement a customer service regime that can seamlessly escalate complex customer service requests into integrated project / program plans for implementing solutions the fastest and most efficient way.

Executive Summary

Most service management tools on the market address simple incidents, problems, and changes, not the complex responses that make up a growing portion of the work seen in IT organizations today. As service response to customer Action Requests grows more complex, enterprises need solutions that are program / project oriented and provide customers with:

- Seamless movement of service request data to the project plan that can help avoid mistakes, reduce redundancies, and safeguard against dropped requirements.
- Improved human and other resource management, scheduling, and work planning. (See Resource Management Chart on page 10.)
- Accurate time-at-task and expense-at-task cost tracking.
- Greater accuracy in estimating completion dates for each request.

Key elements of a comprehensive Action Request solution set include:

1. Assess the Need for Project-Oriented Customer Response: Make sure the effort will bring significant ROI to the enterprise. Make sure the new technology aligns with (a) enterprise strategy for customer service; (b) existing technologies and processes (e.g. ITIL); and (c) related improvements in the enterprise.

2. Acquire Good-Fit Project-Oriented Customer Response Tools: Project Remedies Inc. (PRI) ActionProgram Manager Plus (APM Plus) installs neatly into an existing BMC Remedy Action Request System (AR System) environment.

3. Create Customer Response Strategy Teams (CRS): CRS Teams steer, provide process modeling, and coordinate cross-enterprise process improvement.

4. Decide Which Processes to Integrate: CRS Teams ensure best approaches, processes, and task plans that can generate repeatable–use task templates.

5. Integrate the PRI Applications into your existing Action Request System environment: Looking for strategic early wins, take advantage of PRI's rapid-install (usually one-two days) capability, then set up time-at-task tracking (implementation usually less than a day).

6. Train Users: User acceptance is an essential component. PRI is cited by users for its fast installation and ease of use.

7. Operationalize: Launch the new technology and process – including task templates and repository for meta-tagged "lessons learned" – to initiate smooth, seamless, efficient project management for Action Requests. Using the PRI templates for predicting costs and completion dates, provide requestors with sharpened project information and begin the flow of continuous improvement. Another useful feature of APM Plus is having Change Management built into the technology. This also feeds into a continuous improvement process.

8. Assign Manpower: Resourcing the task plan, take advantage of PRI's capability to see how busy people are when you assign them to tasks, as well as their robust Resource Management charts.

9. Monitor Request/Project Performance: Measure time and cost results and compare to template projections.

10. Analyze Project Remedies™ Generated Reports for Management Data: Capitalize on PRI-generated reports to assess (a) specific Request costs; (b) aggregated Requests costs per Business Unit; (c) actual workloads and potential time/cost savings; and (d) how well resources align with business strategy and goals.

Use the Project Remedies generated reports for management that show:

- The cost of each request, as well as the cost of all the requests for each business unit. This is a key part of any ITIL strategy.
- How busy your people are. This information allows management to right-size your organization and align resources with the needs and goals of the business.

Project Remedies' Enterprise-Action Management Suite supports/is compatible with these processes and tools:

• ITIL • IT Governance • Balanced Scorecard • Lean 6 Sigma • Requirements Management • Enterprise Information–Sharing • Risk Management • Knowledge Management • Tracking Strategic Initiatives • Sarbanes-Oxley	• Demand / Cost / Resource/ Time Management Systems • Program and Project Management • Time and Resource Visibility across the Enterprise • MS Project • Enterprise Resource Planning (SAP) • Capital Planning • Critical Path Analysis • Earned Value Management

1.0 Introduction: Implementing the Project Oriented Customer Service

As U.S. federal agencies and commercial IT organizations strive to apply increased operational efficiencies to more complex and mission critical customer requests, maintaining consistency, quality, and a focus on controlling costs become essential management goals. In many cases, what appears to be a simple help desk incident may require project management to complete effectively and efficiently. Project Oriented Customer Service incorporates a set of best practices and a proven methodology to create a seamless help desk-to-project response capability. This helps you improve quality while lowering operations costs, while also creating a culture of accountability.

Most service request applications on the market address simple incidents, problems, and changes, not the complex responses that make up a growing portion of the work seen in IT organizations today. The complex responses that are increasingly a part of every-day life in an IT organization exacerbate the immediate pain points that most organizations have with: 1) work intake, 2) providing a consistent answer to the same request, 3) estimating a completion date for the request, 4) accurate time-at-task and expense-at-task cost tracking, and 5) prioritization and planning of the people resources required to deliver and support the services they provide.

Work in an IT organization can usually be divided into 2 groups: work done as part of each person's job, and work generated from requests from users.

Requests from users can be further divided into 3 types:

- Simple requests that can be managed with one task.
- Ones that involve the completion of multiple tasks. Adding a new employee or a facility move are examples of this type of request.
- More complex ones that require program management functionality.

The BMC Remedy IT Service Management (ITSM) Suite™ (or your existing homegrown suite) manages intake and the tasks generated from simple and multi-task requests well. However, the completion of complex and typically large requests requires an enhanced level of governance, program management, resource management and cost management functionality not immediately available from the Remedy ITSM Suite™. This is where our ActionProgram Manager Plus (APM Plus) comes in. This add-on application, like the applications that make up the ITSM Suite, was developed using the BMC Remedy Action Request System (AR System), and integrates seamlessly with any other AR System-based application.

2.0 Getting Started In Implementation

This is a list of steps that includes the implementation steps (through Step 7) and operationalizing the process (Step 8 and beyond) which are repeated as the process and technology are used.

Step 1: Assess the Need for Project Oriented Customer Service (POCS)

Does this fit your customer service model? If there are no projects growing out of requests, use your existing AR System. If there are projects emerging out of requests, then it makes sense to consider implementing POCS. It gives you the ability to create project plans with no loss of information from the original request and creates economies.

> There are numerous cost justifications for the approach, but one is time saved by your technical staff. If 150 people save 10 minutes a day on average by looking in one place and getting the correct project plan information, if you value their time with overhead at $100 per hour, the savings is $625,000 per year. Every year!

Step 2: Acquire the Tools

Install Project Remedies' ActionProgram Manager Plus (APM Plus) on your existing Remedy environment. This is a Commercial-Off-The-Shelf (COTS) software solution, developed in the United States, which utilizes the Remedy middleware without a need to modify the existing system.

This is an add-on application that, like the applications that make up the ITSM Suite, was developed using the BMC Remedy AR System. The AR System is both a development environment and a work-flow engine. No additional hardware or software is needed. It literally takes less than an hour and typically involves only your AR System administrator to install PRI's applications on your existing AR System environment. PRI's applications leverage your investment in Remedy in many ways. A high-level process diagram of this configuration looks like this:

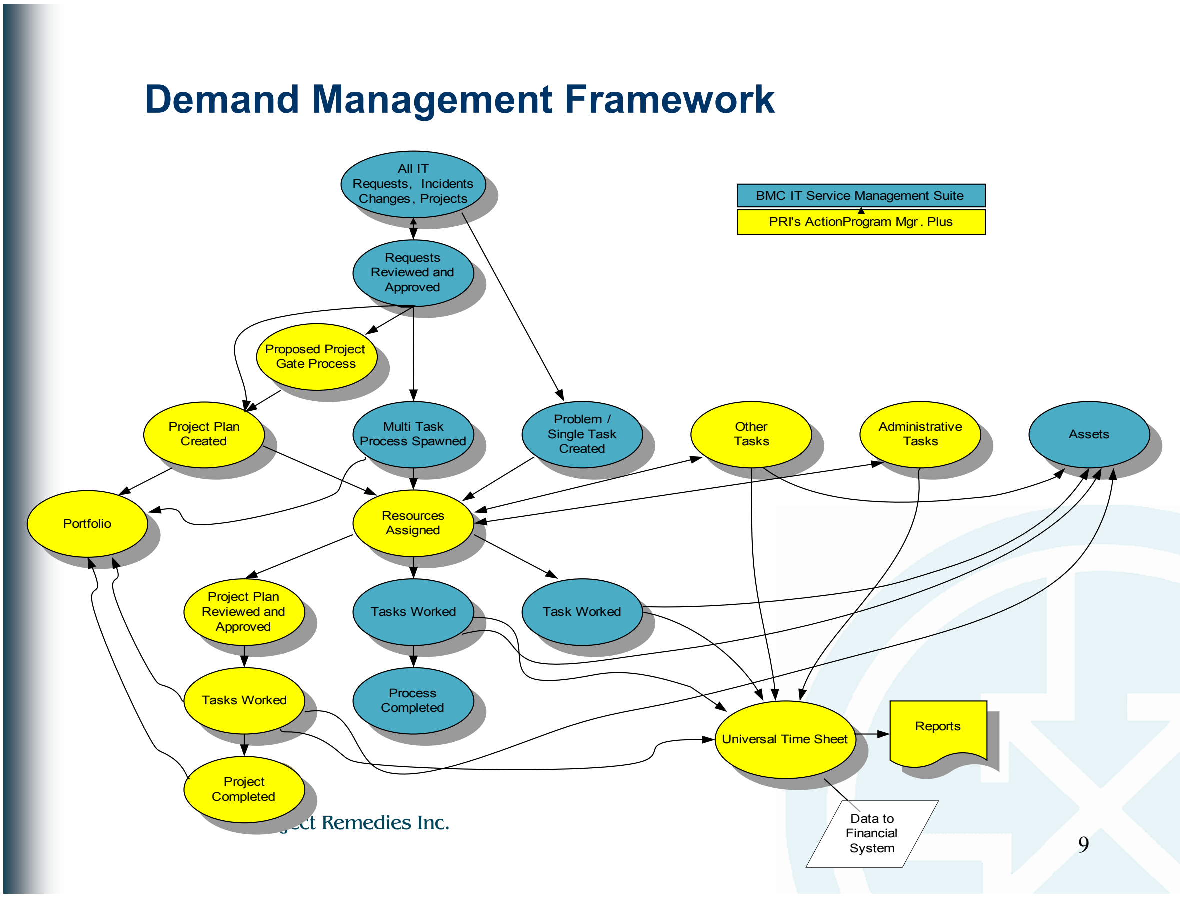

Figure 1 - PRI's Portfolio Management Suite Configured with Remedy's ITSM Suite.

As you can see from this diagram, PRI' solution (Yellow) complements BMC's integrated enterprise-wide service desk and service management applications (Blue). It extends the BMC Remedy Action Request System framework, enabling IT organizations to streamline their business processes, helping them provide efficient delivery and cost-effective IT business services, with increasing customer satisfaction.

Step 3: Create Customer Response Strategy Teams

Create teams of people who function as Customer Response Strategists (CRS). These people act as process modelers and an in-house process improvement team.

These people are experts in specific areas of your business. Have a team for each area. They will become the process experts and will continue to strategize how to further process integration between Project Remedies™ and BMC's AR System.

Step 4: Decide Which Processes to Integrate

Have these teams evaluate your business processes and decide which ones should be incorporated into the system.

Do you want to interface your asset management application with APM Plus so that all costs (time, expense and asset) are brought together at the task level? With this integration, your field techs will be notified that they have a task, can status the task, enter their time against the task and update the asset list, all from the same task.

If you are doing time-at-task tracking in Remedy and interface these applications with your Service Request application, you will have the cost of each request. Since you know who is making the request and the business unit they are in, the number and type of requests from each business and the costs incurred can be accessed at any time. This data can be summarized by type of request. Reports that show how much time was spent on different types of requests last month and the previous 3 months could be generated. The data is current up to the last entry. Here is an example:

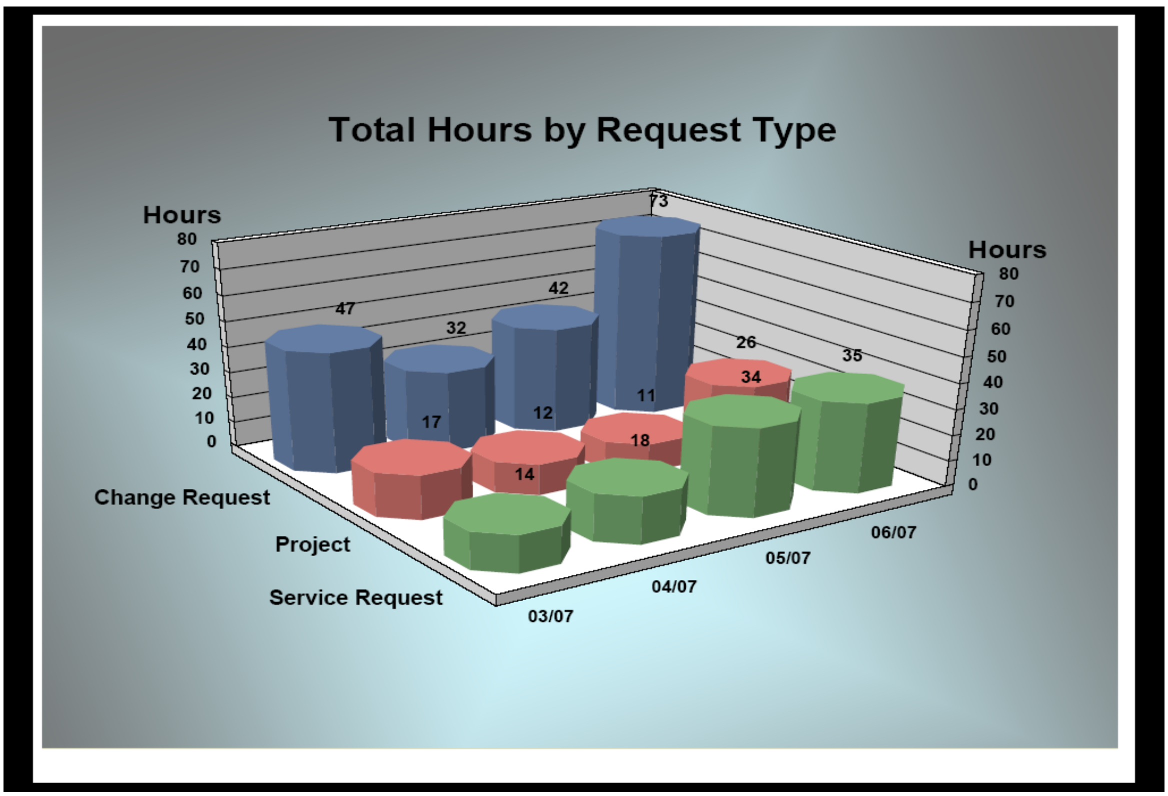

Figure 2 - Summary Report Example.

Have each of these teams determine the best way to satisfy each request and then to create task plans for those requests that require project management functionality. Having task plans is critical to improving quality, lowering cost and improving customer service. Have the teams enter the task plans into APM Plus as task templates so they can be used again and again.

Using templates results in more consistency, which gives the user community more confidence that you know what you are doing. For example, let's say that the same user calls 3 times with the same request, gets 3 different people in IT, and each request is handled differently. Two things happen. First, there is no chance for efficiency because everyone is running around doing the work different ways. Secondly, the requestor is telling everyone he knows that he "called IT 3 times with the same request, got 3 different people, and that IT is working each request in different ways – they obviously don't know what they are doing." Sound familiar?

Creating task templates is easy, and a user function rather than an administrator function. Usually, a certain number of users are given the "process owner" role. Part of their job function is to define and maintain their task templates. These people might be in different geographic regions as well as in different functional areas. The same function might be performed differently in different regions. This capability gives people in each area the ability to define and maintain their own templates.

Step 5: Integrate the PRI Applications into Your Action Request System Environment

Decide how the Project Remedies™ application should interface with your existing AR System-based applications.

There are some easy choices that are quick wins. For example, adding the "Work Time Tab" to your existing incident, problem and change management applications gives you bi-directional time and expense tracking between all applications and the APM Plus Universal Timesheet. The "Work Time Tab" and the workflow involved can be added to all of your applications in less than a day.

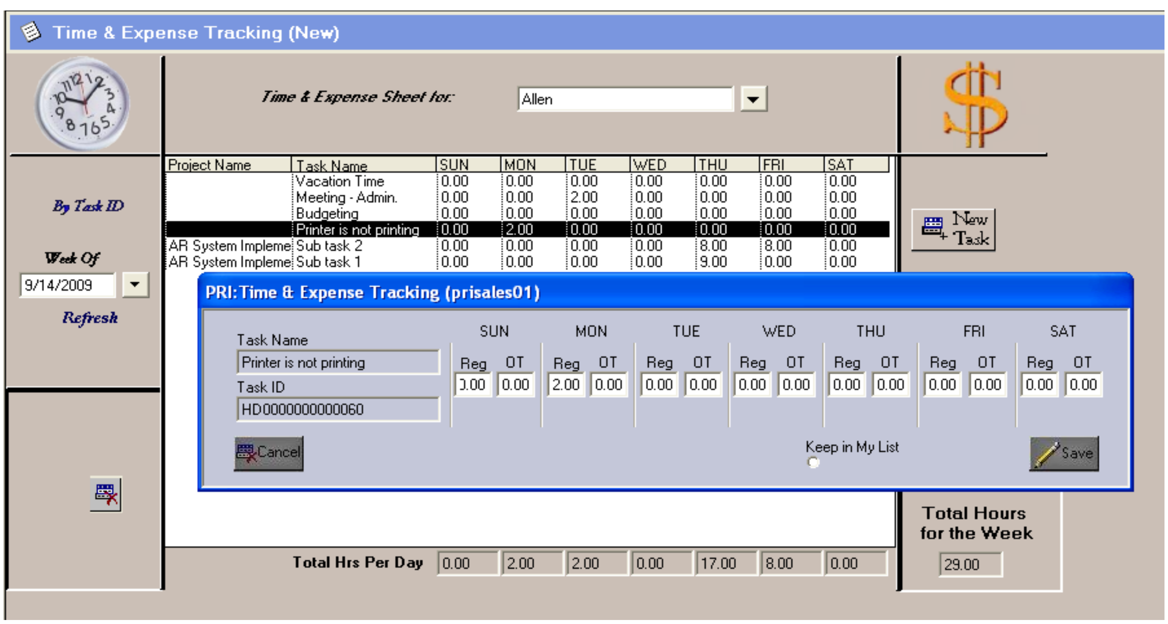

Figure 3 – The ActionProgram Manager Plus Universal Timesheet, Task Name View.

With the time related reports included in APM Plus, with just this one step, you will know the cost of each task and the cost of all work performed by each person.

Step 6: Train the Users on This New Functionality

Each template is a guide for the people working the request. It shows them what the experts think is the best way to do it. The users might want to adjust the tasks in the plan to fit the specific request, and they should be allowed to do this. This feedback becomes part of a continuous improvement process.

Step 7: Operations: Use the templates to predict how much each project will cost

Use templates to predict how much each project will cost, how long it will take to complete the request, and a planned completion date. Provide this information to the requestor.

Also, create a “lessons-learned” repository of meta-tagged data. The CRS teams can review them as customer service situations unfold, and as the teams doing the work learn more about each task plan.

Over time, with user feedback, the CRS teams might decide there is a better way to do a particular function. Since you have been measuring the performance of multiple teams against the tasks in a template, if a template is changed, you will be able to measure if the new way is actually faster, cheaper and results in improved customer service. If not, you go back to the old way, or try still another way.

Step 8: Assign people to the tasks in the task plan

APM Plus shows the person assigning the work how busy each worker is at the time the task is supposed to be done. You will be able to see how busy people are with charts like APM Plus’ Resource Management chart (below).

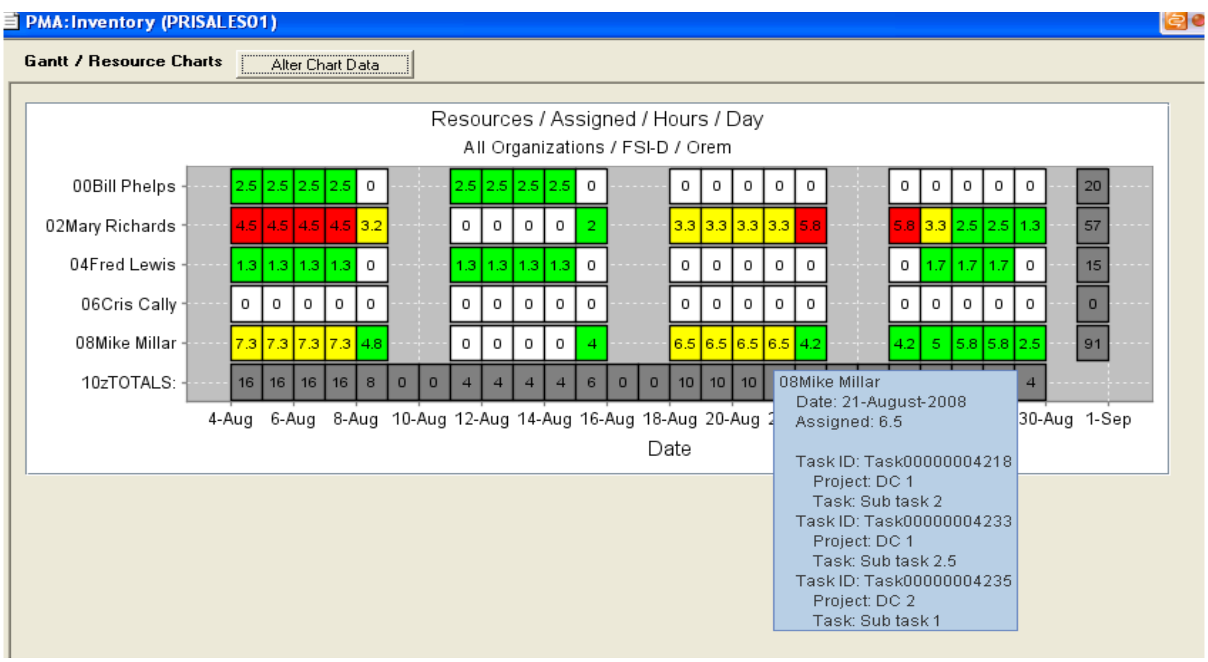

Figure 4 – Resource Management Chart Example: Daily View.

This example shows the “daily” view. If you put your cursor over a particular day for a particular person, the tasks which make up the work are shown. There is also a weekly and a monthly view.

For each person:

- If the box is white, no time has been assigned.
- If the box is green, the person is 1% – 80% assigned.
- If the box is yellow, the person is 81% – 100% assigned.
- If the box is red, the person is over assigned.

If you are having a difficult time getting people to use the system, using this chart can really help. For example, let’s say that a manager comes to his boss and says: “My people are swamped. In order to get the work done, we need to hire a consultant with this skill for this period of time.”

If the boss pushes back on this request and pulls up this chart, it shows that the people really are not that busy. If he shows it to the manager, the manager will go back to his team and tell them that they have to start using the system to communicate how busy they really are. The chart helps prove the business case.

Step 9: Monitor request/project performance.

Clearly, serious efforts at managing cost and lowering cost require time-at-task tracking. Monitoring performance of each team performing the tasks (time spent on each task) is vital to make sure that they are achieving the time and cost results predicted by the template. Time entry in APM Plus is very simple, straightforward and takes a minimal amount of time.

Step 10: Analyze the Project Remedies™ Generated Reports.

Using Project Remedies™ reports clearly shows the cost of each request, as well as the number and cost of all of the requests made by each business unit. This tells the management and head of each business unit the business value of this information.

Request/Project Cost: The cost of each request, as well as the cost of all the requests for each business unit. Are there trends in complexity of project requests? This is a key part of any ITIL strategy and critical for effective operations and maintenance.

Human Resource Allocation: What is the utilization rate of your staff? This information allows management to right-size your organization and align resources with the current needs and future needs of the operation.

3.0 The ROI from Implementing Project Oriented Customer Service

Project Oriented Customer Service utilizing Project Remedies™ has quick ROI because it:

1) Leverages investments that you have already made in Remedy and eliminates the need for the disruptive, time-consuming and costly integration project necessary when integrating disparate products.

2) Creates value through improvement in operational efficiencies in request to project implementation and resource management.

3) Project Remedies is process adaptive and user intuitive so its implementation requires less process modeling and user training.

Building on the BMC Remedy AR System and the BMC ITSM suite reduces the user learning curve and required training, and allows you to better manage the increasing demand for project oriented IT business and operational services. By understanding the demand coming into the IT helpdesk, all of the tasks your people are working and the resultant costs, you have better confidence in and control of your services costs, and the resultant metrics to improve quality of customer service.

For more information about how Project Remedies can help you implement a seamless help desk-to-project response capability, improve quality, increase operational efficiencies, reduce costs and create a culture of accountability, please call your PRI account representative.

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About Project Remedies Inc.

Project Remedies Inc. is a leading provider of enterprise program management solutions, particularly in the areas of IT Governance, Program Management, Demand Management, Cost Management and Resource Management. Headquartered in Los Angeles, Project Remedies Inc. has been in the Remedy community since the company started in 1993, and is a BMC partner in BMC's Technology Alliance Partner program. All PRI applications have been developed in the United States. For more information about Project Remedies Inc., visit www.projectremedies.com.