



ITSM: A practical guide to managing growing pains

Chapter 2 Human factors in ITSM Migration

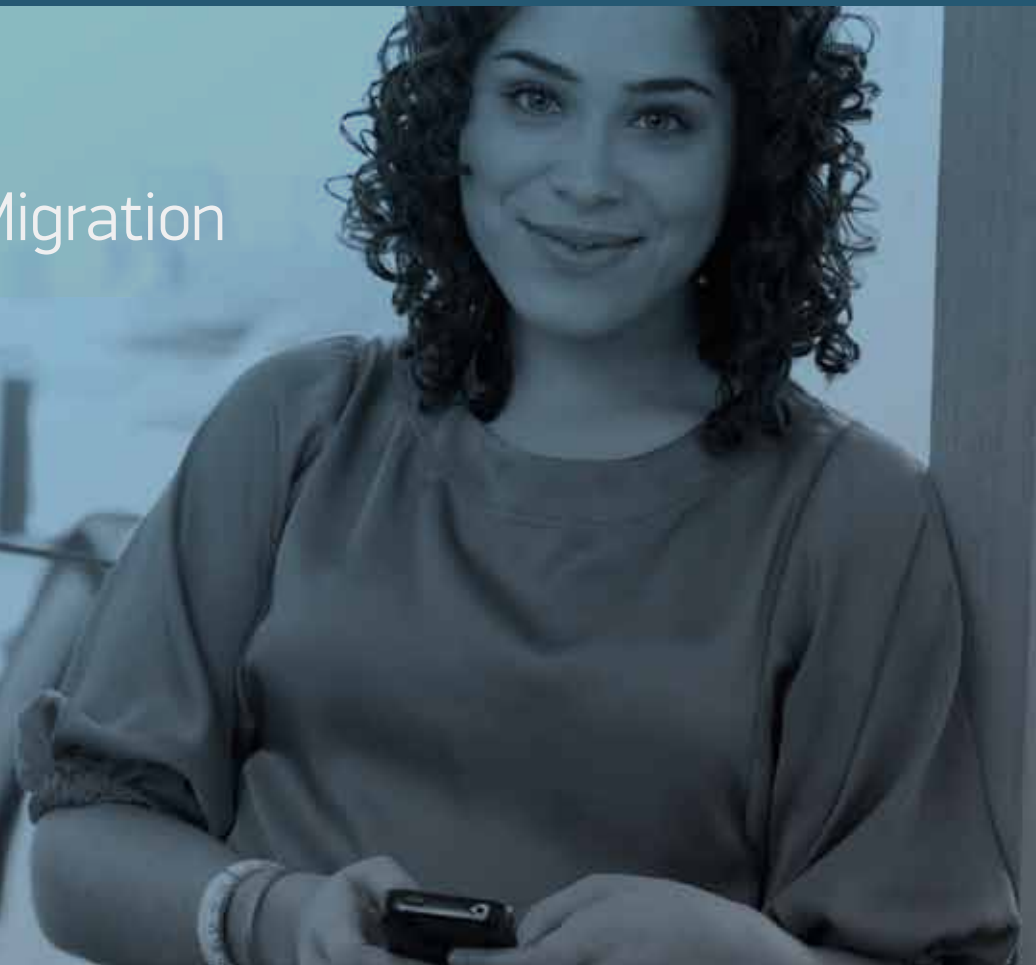


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The People: Building Consensus

People are critical to the success of any **ITSM** transformation. Indeed, nearly anyone who has navigated an ITSM transformation will confirm that their greatest challenges came from the people involved.

IT teams may resist proposed changes, clinging to deeply engrained work patterns, language and systems. Consumers—whether internal employees or organizations engaging in SLAs—may also struggle with the shift. For them, your ITSM solution has been their primary point of contact between the broader organization and the IT function. They will be heavily invested in any changes affecting how you organize and deliver your ITSM solution.

The industry is rife with resources addressing organizational change. Thus, we have composed this second chapter in our series to help you tackle some of the key challenges that seem to arise time and again. We'll share our experience and advice, including recommending additional resources on the psychology and science of change directly applicable to ITSM transformation.

A Foundation for Change

Studies show that most ITSM improvement projects fail before they really get started. In our experience, this is because most stakeholders don't understand why the project is happening or how it will be accomplished. This can be avoided if all parties agree upfront that:

- > The exercise is necessary and will benefit all concerned
- > The project can actually be completed

The chances of an effective and successful delivery increase substantially if you can build on a foundation of broad-based readiness for change.

Want Versus Need

While it's crucial that all stakeholders believe in the mandate for change, they are more likely to be invested if they *want* it to happen. This is in contrast to feeling that the change *needs* to happen or *ought* to happen. Case in point: extensive research done by organizational change experts, John P. Meyer and Lynne Herscovitch.

Meyer and Herscovitch found that when the collective *wants* a project to succeed, the following factors improve: collaboration, problem solving and teamwork. Further, the number of people actively championing the undertaking, without prompting or coercion, increases dramatically.

Cultivating a Collective Want

Changes to your ITSM structure will impact your IT team the most. Understandably, they are therefore the group least likely to want significant change. So, what can you do to engage them?

- > **The practitioner/manager survey:** Ask the team to honestly and anonymously identify the realities of their working situation. This tends to work better than hosting group or workshop sessions, where participants may not feel comfortable sharing their true feelings and pragmatic analyses.

The following is an example of a simple and effective survey you can use with your ITSM team and others in closely related functions. Feel free to further subdivide the questions as you see fit.

- » How effective are our IT support processes?
- » Where do we waste the most time in responding to requests?
- » How effective is our ITSM software solution?
- » How well do we share information within and between teams?
- » How would you rate the quality of service you are able to provide to our users?
- » Do we measure and track the right things?
- » How useful is our knowledge base?

- > Build your target KPIs together: Invite all team members to define a shared view of success, and you may be surprised to find that even the most hardened skeptics will temper their objections. Their participation is vital to reinforcing the vision and its credibility.

In the first chapter in this series, we outlined sample goals and measurements you could use to present your ITSM business case. This included KPIs for substantiating the proposed transformational goals. We recommend that you include team members in designing and constructing these goals and KPIs. You'll discover that this can quickly unify the team and provide a measureable uplift in commitment to the project.

As you work with the team, you may want to consider some questions that people typically weigh when evaluating the merits of organizational change:

- » Will the change resolve organizational shortcomings and, by extension, make my life better?
- » Does the change further the values and ethics of our team?
- » Is there urgency? Is there a sense that something needs to happen sooner rather than later?
- » Is their clear and consistent support of my leadership for change?
- » Is their support from my peers for change?

By developing a shared vision for success, you're likely already addressing the critical decision factors above. Your next step? Revisit our outline in Chapter 1 and engage your teams to define and build the measurement framework.

Can We Build It? Yes, We Can!

We've all heard the story about the little engine that could. Believing that something is possible is just as important as wanting it to happen.

Organizational change experts attribute this to self-efficacy, or one's belief in his or her ability to succeed in specific situations. This concept directly impacts your ability to build a foundation for successful outcomes. Those who genuinely want change have a much higher sense of their self-efficacy.

So, how do you convince your team that successful change is possible? You'll need to reassure them that:

1. A comprehensive, thoughtful plan exists
2. The people involved are capable of successfully planning and implementing the project
3. Sufficient resources and contingencies exist to see the job through to the end
4. There is a sound strategy for communicating and measuring progress
5. Any broader organizational barriers to change can be removed or at least bypassed

The best way to ensure your plan is widely understood and validated is to include the broader team in its construction. This encourages ongoing peer-to-peer collaboration, reinforces support for the plan and helps foster confidence in the project management and methodology.

In our experience, the organizations that built small, yet focused and inclusive, teams were most successful. For example, the following members could comprise a strong core team:

1. Project management professional (some organizations prefer an individual with no ITSM experience)
2. Project sponsor and owner from ITSM leadership group (or broader IT leadership)
3. Service delivery management representative (if applicable)
4. Business sponsor/s from a supportive and engaged function
5. Two practitioners from each ITSM process/function (depending on scale)

As you and your core team make progress in formulating a plan, you'll want to communicate your status to a broader group of interested stakeholders at regular intervals. That's where a strong communications plan comes into play.



Explore more

Interested in learning more about the significance of believing? Try a Google Scholar search on self-efficacy or group efficacy.

The Communications Plan: Your North Star

Many organizational change experts believe that the communications plan is as important as the plan for change itself. Indeed, if it's constructed and managed well, it can make the difference between a project's success and failure—especially when it comes to large, complex initiatives. It also forces the project team to carefully define the key stakeholder groups and what they need to know.



Explore more

Looking for guidance on creating a communications plan template? Then consider investing in Michael Campbell's book, *Communications Skills for Project Managers*.

The Template and Its Components

There's no shortage of communications plan templates available on the Internet. Quite often, you can download them completely free of charge. The challenge comes in knowing which ones will help you create a complete and effective framework. To that end, we've compiled a list of attributes that every good plan should have:

1. A section for stakeholder/audience modeling where you can record the details related to key individuals, groups and contact information. You may also want to document the group's preferences regarding communications mediums here too.
2. A list of content authors and sources, including contact details and focus areas.
3. A list of standard communication types and channels, including templates and guidelines for their use.
4. A schedule of planned communications, including:
 - a. Communication type (e.g., general progress update, interactive survey, completion notice, etc.)
 - b. Audience details (e.g., a list of groups and individuals)
 - c. The purpose of the communication; this is critical and often overlooked
 - d. Date and/or frequency of communication

- e. Content source and/or communication owner
 - f. Proposed communication channel/s (e.g., email, webinar, video, Twitter®, Chatter®, etc.)
5. Details of your exceptions and emergency communications procedure
 6. Your content and communications approval processes
 7. Messaging and voice guidelines: These are key for those authoring communications on the team's behalf. Knowing what to say and how to say it can help ensure consistency and clarity. This section is your opportunity to reinforce the importance of having a pragmatic and positive tone in your communications.

While this approach may be overkill for a smaller project, it's still beneficial to at least consider these components. The time you invest on the front end will likely pay off at some point in your project's lifespan.

Executive Endorsement

If you're far enough along that you're contemplating communications plans, you've probably already had to secure some level of management buy-in. Perhaps it's even your own. The next step is to ensure that senior management endorses the project and continually communicates—and demonstrates—their commitment company-wide.

Time and again, we witness projects where project stakeholders overlook this step. Or, senior leadership is highly visible at the onset of the project, only to vanish as it progresses. As a result, the voices of opposition tend to rise, and the project risks losing credibility.

A better option is to have the executive team deliver the initial public communication, thereby setting the tone and the appropriate level of endorsement. From there, well-authored communications plans deliberately include regular updates from the senior leadership team, making special provisions for communications in the event of project difficulties or setbacks.

One of the most effective, and entertaining, examples we've encountered came to life through video initially. Thereafter, senior leadership delivered updates in a relaxed and informal style. When there was a significant setback, the CIO emerged in front of the organization. He clutched a fake school report with a big red "F" circled next to his name. This succeeded in humanizing the project challenges and reinforced the CIO's commitment and accountability.

Shifting the Narrative: a Mandate for Ongoing Communication

Many organizations embark on ITSM transformation projects hoping they will also herald a new and much improved culture. Occasionally they do. To understand why that's not the norm, it's helpful to consider the concept of organizational narratives. These are enduring stories that members of the organization perpetuate. They characterize how things are and how decisions get made, and may even predict the outcome of any change. Further, they define almost every other aspect of the organization's behavior.

Pervasive and persistent, narratives play a very significant role in shaping group culture. Every organization has a unique narrative, which is a product of history, attitudes, cultural norms, leadership, etc. There are, however, definite patterns and groups of narratives—some of which are more conducive to project success than others.

Organizations that have experienced well-managed and executed changes tend to have positive narratives. They are receptive to the average ITSM transformation initiative.

Conversely, there are organizations that believe “things have always been this way and should continue to be this way” or “major projects are typically unsuccessful here.” When this is the narrative, even projects that are planned and executed well will struggle. Indeed, they may fall victim to their self-fulfilling prophecy of project failure.

So, how do you shift the narrative? We recommend consistent, ongoing communication during project planning and execution. Slowly but surely, with persistent effort, you’ll see the story shift from one of inevitable project demise to a tale of wanted transformation and an improved group identity.

To help you change course, keep the following guidance in mind:

- > Communicate why the change is needed and how much measureable progress has been made—continually
- > Have trusted peers or respected leadership deliver your message
- > Ensure communications are meaningful, honest and well-engineered—not fabricated
- > Convey a pragmatic yet positive tone; most of your audience will see through a false-positive spin
- > Carefully consider your choice of words and their impact on the group



Explore more

Dig a little deeper into the concept of organizational narratives, take a look at David M. Boje’s book, *Narrative Methods for Organizational & Communication Research*.

There is a whole science dedicated to understanding the emotional impact words can have and their role in effective group influence. For more information—and a list of powerful words—check out the research on “Affective Norms for English Words” (ANEW) by Margaret M. Bradley and Peter J. Lang.

Going Social

The 21st century is a communicator's dream. With an abundance of social and new media channels readily available at no cost, building a bulletproof communications delivery plan is easier than ever. The trick comes in identifying the mechanisms most widely used within the organization and then leveraging them at the appropriate scale, mindful of security constraints.

Following are examples of social technologies that we've seen be effective when communicating change communications plans:

- > A project page on Facebook®, with the appropriate privacy controls applied as needed
- > Internal social media collaboration platforms and groups, e.g., Chatter, Yammer, etc.
- > Video diary updates; these work best when humor is applied and the video is not too polished or produced
- > Blogs; these are especially useful for more detailed updates
- > Wikis; these are useful for more complex project documentation or content hubs
- > Lunch and learns, in person and via Skype® or Google+ Hangouts
- > Collaborative survey tools, e.g. SurveyMonkey®
- > Twitter updates for short, focused communications (where permissible)

Remember how the communications plan requirements we detailed above urged you to think about the *purpose* of the communication? The same rules apply to communicating through social media channels. Think carefully about why you're communicating, even if it's just a quick Tweet. Over-communicate and you run the risk of your audience tuning out, thereby compromising what could have been a very powerful channel.

Further, your choice of channels should coincide with the purpose of your communication. That is, if want to interact with your audience, Chatter and Yammer would be good options. To broadcast a communication, you might consider Twitter or Facebook.

An effective social media-driven communications plan will likely use a mix of the channels described above. You'll need to think carefully about what each tool does best and plan its use accordingly. Be sensitive to the cultural norms in your organization too. Lastly, since this arena is changing rapidly, you'll want to stay on top of the emerging platforms and techniques.



The Importance of Education

If you want to build even more support for your ITSM overhaul, we recommend including a comprehensive practitioner and management training program in your project plan. While most ITSM solutions today are fairly intuitive and easy to use, it can still be wise to offer a few hours of agent training. In fact, one of the most common post-implementation complaints we hear relates to training deficits.

Sometimes the grievances stem from poor product training that leaves agents and end-users to fend for themselves once introduced to the new tool. More often, organizations neglect to train teams on any changes or additions to key processes and work practices, assuming that product training is enough.

There is a lot to consider when rolling out new ITSM systems and working practices. Following are sample training topics we've garnered from some successful ITSM implementations:

Agents and ITSM practitioners

- > In-depth product training for power users and nominated trainers
- > Product familiarization for all first line agents
- > Our new processes: What, why and how
- > How to give excellent customer service: A primer
- > Our new SLAs, OLAs and Underpinning Contracts: What you need to know and where you fit in
- > What we're measuring: Metrics and reporting overview
- > What to do if you spot a product, process or communications problem

Managers

- > Product training as required by functional area
- > Reporting and analytics systems training
- > Our revised processes and what they mean for you and your teams
- > Our new SLAs, OLAs and Underpinning Contracts: Using and measuring
- > Building and maintaining a service ethic in your teams
- > How we're using reporting and analytics
- > What to do if you spot a product, process or communications problem

End users

- > Video primer for end users on how to use self service
- > Email communication introducing the new services with key links and contact details
- > Web based self-education on self service
- > Launch events (see discussion in the next section)

For simple, small-scale ITSM projects, this list may be a little intimidating. Just use it as a guideline to help you think through what people need to know. We can't overstate the positive impact that a well-thought-out and inclusive training program can have. It doesn't have to cost a great deal either, especially if you're able to use your own resources to deliver the sessions.

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Selling and Promoting the Project

In IT circles, the concept of marketing is not one that's readily embraced. Instead, it's often considered advertising or spin. Like it or not, you actually have to tell people that your project has been a success and is likely to make a difference in their working lives. It's vital that everyone understands and acknowledges the efforts you and your team have made, particularly if you need to conduct a similar exercise in the future.

You'll need ramp up your marketing efforts early in the process. For example, giving your project and new ITSM function an identity right from the start can have a powerful, unifying effect. Consider launching the new service as publically as you can too. The success of some critical initiatives such as self service depends on employee uptake and utilization. Make sure everyone knows what you have to offer.

We recognize that marketing isn't an activity that comes naturally to everyone. That's where it's helpful to understand what other organizations have done. Following are a few ideas.

Identity, Branding and Naming

Creating a brand identity for your new ITSM service is a good idea. Start by choosing a good name—one that conveys something about your charter and team ethic. Naming the project and service can help unify the team and promote a strong sense of self-efficacy as discussed earlier.

If you have the budget or internal talent, you should consider creating a visual identity for the service too. A logo, color palette and font treatment can impart a professional image and instill more confidence in your internal customers. Just be sure that you adhere to your company's existing style guide and that you live up to the promise of your brand in order to avoid it becoming an object of ridicule and derision.

Promotional Materials

Another way to get the word out and infuse excitement and support for your project is by distributing branded giveaways. Consider applying your visual identity, self-service URL or social media icon to posters, key fobs, car chargers, t-shirts, screen cleaners or anything else that's popular in your organization. Make sure you choose your objects wisely. For example, branded screwdrivers that employees can use to take apart their own devices are not a great idea. And, yes, we have seen it happen.

Selling Self Service

These days, we all know how ineffective the "build it and they will come" strategy is. If you don't tell users where your self-service portal is they may never end up using it at all. Case in point: We encountered an organization that spent a great deal of time and effort building an amazing, easy-to-use and fully automated self-service capability. They were completely puzzled that nobody actually used it. When we enquired as to how they had promoted it within the company, we learned that they had not promoted it all.

Words of wisdom: All it takes is a few posters around the office, a quick email campaign and a link from the company intranet.

Selling Your Skills and Talent

It's easy to forget that you and your team possess valuable skills and deliver vital services to the broader organization. Some of the most powerful internal ITSM promotional campaigns we've seen have focused on the practitioners themselves. This strategy can have a humanizing effect on how the new service is perceived, while also reminding your customers that your team is much more than just a resource.

Launch Events

Celebrating the culmination of months of careful planning, skilful communication and a successful implementation is something best done in person. Launch events are a great way to publically demonstrate project completion and engage with your internal customers. Promote your event ahead of time, keep the formalities to a minimum and make sure the finger food is plentiful. You'll also want to have some machines and staff on hand to demonstrate any new capabilities that affect end-users. A PC clinic or genius bar can also be popular ways to interact with your customers.

Metrics: Checking in after Go-Live

You'll find a whole chapter later in this series devoted to metrics. For now, we want to touch on some measurements, trends and feedback that you should watch after you've launched your new service. To clarify, these are not the same as the exhaustive set of metrics you will have inevitably designed as part of your new ITSM capability. Instead, we're focusing on the measurements you can make to assess the service's impact on your teams and internal customers.

In this early stage, it's key to not overreact to downward trends. You need to let your users, agents and systems get used to the new service. If the key performance indicators continue to decline or plateau at a low level weeks after launch, you may have cause for concern.

Benchmarking is also important. Don't expect impressive results all around if your performance was less than stellar prior to the project.

The Top Five Post Implementation Metrics

- > **User satisfaction:** It should be obvious why this is a critical post-implementation metric. You need to keep a very close eye on whether the service quality you think you're delivering aligns with what users are actually receiving.
- > **Agent satisfaction:** Widely underutilized, this measurement can reveal volumes about the realities of working within your new operational framework. Plus, it's a very effective mechanism for identifying further improvements or holes in the new processes.
- > **Self-service uptake:** You built it, but did they show up? If self service is part of your new portfolio, you need to have a firm grip on how many people are actually using the capability, understanding the accompanying growth or downward trends. Having an unused self-service portal is compromising your efficiency and credibility. It's better to take corrective action sooner rather than later.
- > **SLA performance trend:** Are you meeting the levels of service you agreed to with the broader organization? It's acceptable for performance to wane a little immediately after launch. However, consistently missing targets for weeks afterwards means they were poorly chosen or you need to do some serious tuning. Of course, it could be due to both of these conditions. Either way, you need to deal with a negative trend swiftly.
- > **OLA performance trend:** With the new organization and process structure, are you able to organize your work better and deliver better, more efficient customer service? Declining OLA performance is a sure-fire indicator that all is not well in your new world. Unsettled teams, organizational shortfalls or process problems can all manifest in an inability to meet key internal deadlines.

New Team Structures and Tier Zero Support

The future of your ITSM team structure is highly specific to your organization and operational constraints. Larger organizations will be concerned with centralization versus decentralization, geographic coverage and shift pattern optimization. Smaller organizations will need to focus on balancing multiple roles for individuals and prioritizing only those processes that really need to be delivered and staffed.

Some organizations may choose to align their roles and team structure directly with process and functions as advocated by ITIL. Others may choose an approach that mirrors a commercial customer service organization. The variations are infinite. Your real assignment is to think long and hard about the organization you need to meet the levels and types of service you've agreed to with the business.



Explore more

Taking a service-oriented view can sometimes bring a fresh perspective to your organizational planning. However, if you're really stuck for ideas, try searching online for "Organizing ITSM teams." You'll find some great advice from experts and several sample structures that might give you some more ideas.

Following are some emerging trends that are driving new staffing requirements for ITSM teams. Some are widespread; nearly every organization we meet reports encountering them. Others are more recent but growing in significance.

Watching Social

If your organization is new to the social IT scene, you'll want to assign someone to delve into how support works in the context of social media. This can result in a new archive of technology acumen for your team, while also helping everyone better understand today's information sources and how they're rated and trusted by the worldwide community.

Some organizations have been brave enough to make their internal support operations fully public and transparent on platforms such as Twitter. These scenarios can be highly educational for a social IT novice.

Watching and Talking Social

Most employees today expect to be able to interact with each other using social tools. From their perspective, the IT support group should be no different. So, if you're about to offer this new channel as part of your support services, you have a couple options. You can dedicate teams to the medium or simply make social requests an integrated part of the work queue for everyone. Currently, the former option seems to be the most popular choice.

A social-only team provides a traditional incident and request service using a social collaboration tool. It can also carefully monitor the conversations and trends on internal and external social platforms, looking for significant issues that may require intervention. Finally, the team can ensure that important broadcasts and notifications are communicated to the appropriate forums.

Fully Leveraging Tier-Zero Support

Some more progressive organizations encourage employees to seek peer-to-peer support before contacting the service desk. This is a fairly extreme strategy, but it does reflect a current trend: An increasing number of technically savvy employees are trying to rectify issues themselves before contacting IT.

Acknowledging this trend, many organizations are making peer and technology user groups available on internal social collaboration platforms. They're also publishing external sources they trust, ensuring that employees reference more reputable places.

Blurring the Line between Internal and External Support

For an increasing number of industries, mutual dependence on a common platform is fast becoming a reality. That is, many organizations and their customers are dependent on the same technology infrastructure. As a result, internal IT support teams and external customer support groups are merging, creating a total service management function.

Providing consistent, end-to-end technology support services to both internal and external stakeholders requires that the teams share all information, knowledge, systems, processes and communications. Ideally, all the teams involved would operate in the same organization.

An Eye on the Future: Contextual Support

The average smart phone or tablet device knows precisely where it is at any given moment—a capability that has spawned an excess of location-based services and applications. These devices can, and do, store an abundance of information about their owners, their habits and patterns of behavior. Thus, capabilities like Google Now are taking advantage of this positional and behavioral data, pre-empting the device owner's needs by supplying useful information without prompting.

Imagine if your customers were able to access contextual IT services and support on a mobile computing platform—services entirely sensitive to their behavior, preferences and location.

“Welcome to the London office, Alice. Everything you need to access the local systems and get to work has been configured on your device. To call home, the access code from this office is 011. Just tap here if you need any further assistance.”

Sound far-fetched? We predict that your employees will come to expect this kind of service in the not-too-distant future, creating new demands for a new kind of knowledge worker in your new kind of team.

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