HOW TO BUILD AN IT SERVICE CATALOG

In this 2-part series, we'll take a close look at what it takes to plan, create and deploy an IT Service Catalog.

Whether you are delivering IT services to a large enterprise-level user community or small groups of independent users, the service catalog plays a critical role by acting as the common interface for users to access the products and services required to ensure smooth and timely delivery of products and services.

In today's highly available computing environments, the ability to quickly request and access services is not only expected but required. The best way to do that is through having a thoughtful and intuitive service catalog. As all 24x7 organizations know, on-demand access to resources is critical and the focal point for those services is the service catalog. It is the one-stop shop to fulfill your users' needs. If a new employee has to request multiple services from several different locations to get the resources required to be productive, what should be a great user experience is reduced to a journey in frustration. Creating a people-centric catalog puts the IT service delivery focus where it belongs – on helping your people acquire the resources they need to be successful.

To understand the difference between a Service Catalog and a Service Portfolio, see the related blog post on the difference between the two.

Putting together an intuitive and highly effective service catalog is best achieved when you take time to outline the end-users' objectives when they use it. From my experience developing these for clients, it comes down to outlining the details around seven key areas from a customer focused

perspective:

1. Planning for a service catalog
2. Identify your customers and service providers
3. Identify what services will be provided in the service catalog
4. Using the proper tools to build the service catalog
5. Gauging user acceptance of the catalog
6. Deploying the catalog to end users
7. Using metrics for continual improvement

In this first blog, I will explore the first three key areas and examine the important focal point for each that makes or breaks the success of the service catalog. My next blog will go through the final four key areas as well as guidance on how to bring it all together.

1. **Planning for a service catalog – planning for customer needs and getting buy-in**
   Understanding what the customer wants is a key aspect to planning. It serves as the goal for the project as a whole. For example, a common vision statement around what customers want from a service catalog would be:*"As a customer, I would like the ability to find, request and receive products and services easily and in a timely fashion so that I may perform my job more efficiently."*With the goal in mind, let's lay out some planning steps.One critical success factor for planning the service catalog is having executive support for the effort. Aligning the service catalog project goals with those of the business assures leadership that the outcomes are strategically aligned and will be in the best interest of the organization.

   After that, it's time to gather the team. Selecting your team members for the project involves engaging a good cross section of the IT organization. Having representation from multiple areas has the benefit of people who know the people and the processes. They have a deep understanding of what their users need and how they work. Let's dive in further to explore the user community.

2. **Identifying your customers and service providers**
   Understanding who your customers are and what services they will consume is a fundamental step in building the service catalog. Additionally, routing each request to the appropriate group for fulfilment is vital to reduce the amount of time it takes to deliver a particular service.In many organizations, any user on the network may request and consume services from the catalog. In order to provide services in a secure manner, the services should be defined with boundaries, known as "entitlements," regarding who can access a particular service based on their role. This can include the concept of displaying a single service first to request an account. Once created, the user is added to a few groups that will expand the numbers and types of services that are displayed to her/him and can be based on their job function.

The concept of entitlements can also be extended

to services from multiple catalogs. When aggregating multiple service catalogs in complex environments, having the ability to show or hide these services becomes critical. Why that is can best be illustrated with an example. Think about what might happen if an employee in the facilities department had the ability to request a new virtual server. Their company role and function do not have a need for a virtual server so should they request one, it would likely be for a purpose outside their area of responsibility - opening the company up to risk or unmonitored cost.After identifying the users that will request services, attention must be given to identifying the individuals or groups that will ultimately fulfil the service requests. This is accomplished by performing an analysis of the groups that make up the IT organization. Interview each group to determine what services are currently fulfilled, estimate how long it takes to complete each one, and any costs associated with completing the request. It also makes sense to identify or assign a service owner for each group. The owner will act as the single point of contact related to their particular services.

Now that we know who will request and who will deliver the services, we can focus on identifying what services the catalog offers.

3. **Identify what services will be provided in the service catalog**
There are several layers of detail that need to be addressed to effectively identify the final services that will be made available in the service catalog. The first layer is doing an analysis of the services that your IT organization delivers today. Where do you start that analysis? You need to gradually work through all of the legacy service delivery methods, from simple to complex looking to identify what services are most frequently requested. For example, if one of your service fulfillment methods consists of a string of e-mail threads, it would make sense to collect and analyze all of those emails. Once the most frequently requested services are identified, it's also a good time to review, document and potentially improve the processes required to fulfill each service. Performing the analysis and then updating service delivery methods allows an organization to streamline the delivery process, which ultimately reduces costs and improves resource allocation.The next layer of detail for effectively identifying what services will be in the service catalog is to set realistic expectations around the services that are provided to customers. If left unexplained or poorly communicated, customers may develop an unrealistic view of the fulfillment timeline. To the user, a particular service may seem very easy to deliver on the surface. However, it could actually involve many steps and require multiple approvals in order to be completed—all of which aren't immediately apparent to the requester. Understanding what it takes to deliver a service as well as how long it takes and what it costs need to be compiled into creating Service Level Targets for the organization. Service Level Targets make it possible to measure performance in service delivery and need to be communicated to set realistic expectations with the customer requesting them. Some service delivery aspects can have service level targets that are automated. As an example, it is important to take into account where the services will be fulfilled. If a service is location dependent, then the technology must have the ability to route the service request to the resources in the correct location.After you plan for end-user expectations, the next layer of detail you should focus on is making it easier to navigate the service catalog. I recommend you start with categorizing services and applying keywords to facilitate easily navigating to or searching for the appropriate service. Service categories allow your users to locate the services they need in the shortest amount of time. Additionally, well-designed and consistently applied categorizations provide reporting metrics that are easily interpreted. Vendors should

be able to leverage best practice or have clear examples of categorizations to help you achieve them for your service catalog.Lastly, to further simplify the service catalog, spend time on bundling services. Doing so streamlines delivery for specific events. As an example, creating a bundle like "employee onboarding" or "employee departures," takes the guesswork out of connecting the new employee with a myriad of services they need to quickly become a productive team member. If we take a minute to think about all of the resources required to perform this process, it quickly becomes apparent that a coordinated effort from multiple entities across the organization is required to deliver a seamless onboarding experience. Bundling these services together to deliver a specific outcome, allows for that seamless experience that customers are craving.

Stay tuned for Part 2 of the series where we will explore taking the information gathered and using it to build, test and deploy the catalog to your users as well as measuring the success of your efforts.