

HOW TO BUILD 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 this blog post, we'll take a close look at what it takes to plan, create and deploy an [IT Service Catalog](#).

What's a service catalog?

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](#).

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Creating an IT service catalog

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 in seven key areas from a customer focused perspective:

1. Plan customer needs for a service catalog
2. Identify your customers and service providers
3. Identify what services will be provided in the service catalog
4. Use the proper tools to build the service catalog
5. Gauge user acceptance of the catalog
6. Deploy the catalog to end users
7. Use metrics for continual improvement

1. Plan customer needs for a service catalog

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. Identify 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 fulfillment 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 the service catalog will provide

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.

4. Use the proper tools to build the service catalog

One of the hallmarks of great service catalog software is the ability to quickly and easily build and deploy services to your end users. They should be presented with an easy-to-use interface that makes requesting and tracking those services through to completion a seamless and frictionless experience. Providing multiple channels and methods of interaction—such as email, web, and mobile—allows the user to quickly communicate with those fulfilling the requests. Additionally, the catalog should enable those delivering the services to process the requests that users have submitted in a quick and efficient manner. A good service request application will also have the flexibility to automate the fulfillment process whenever possible.

The service catalog toolset is the enabling technology for the digital workplace to aggregate the required services into one platform. What differentiates a proper tool isn't just the way it delivers services to the end user, but how it's intuitive for the business analyst to build services. By allowing the business analyst to step into the role that was once the domain of a developer, the tool establishes an immediate cost savings. And because the tool is so intuitive, after building just a few

services from a prioritized list to become familiar with the process, the remaining services could be built in a very short time. Time is money, so accelerating the time to value realization creates a more agile service deployment, which results in cost efficiencies for the enterprise.

From my experience, critical features and functions of a proper tool include an intuitive user interface with easy drag-and-drop functionality for developers. This is important because you don't need to hire an expensive development team to build services. Plus, an end user should expect the same consumer-like experience that they have with online shopping within the service catalog. One tool that offers all of this is [BMC Digital Workplace](#).

Now that we have an understanding of the characteristics of a proper tool, let's explore the inputs that allow for the creation of services that will excite your end users. The best practice for building each service that will be offered is to take all of the information gathered from service owners and other stakeholders and use the information to build out the service.

The kinds of information that you'll use are:

- **Service titles** and any detailed descriptions or instructions that will help the end user understand what's being requested.
- **Turnaround time of the service**, which is calculated as the length of time from when the service is requested to when the requestor is notified of completion.
- **Cost of a service**, which may include the cost of equipment or chargebacks from external groups to fulfill a service, and is especially important for complex services requiring multiple groups to complete the request.
- **Identifying what application will be used** to fulfill the request, and depending on the service, the request may result in a work order, incident, or a change request.
- **Questions to ask the user to collect the details that will be used to inform workflows**, as the answers to the questions can help route the request or automatically select an appropriate application template.
- **Input validation to be performed on user input**. This step is important because a user or users may input data in several different ways. This data must be normalized to a standard pattern, which is critical for consistent reporting and ensuring that any data to be passed through external programming interfaces is in a format that is expected.

Once all the services in your catalog are built, it's important to test each service throughout the lifecycle. It would be disappointing to present services to users that didn't work and didn't deliver the capabilities required for them to be productive. After all, there's only one chance to make a lasting, positive first impression.

Now that the catalog is built, it's time to present it to a small group of users to gauge the level of acceptance and adoption.

5. Gauge user acceptance of the catalog

Once the service catalog is built, tested, validated, and strategically aligned with business goals, pilot groups also known as focus groups can be developed and engaged to ensure that the planned catalog effectively serves the needs of the organization. It's best to select a wide cross-section of users to represent the business as a whole.

The focus group is invaluable to the project as it can offer feedback that reflects how the group

members experience and interpret the service catalog, as well as portray it to be beneficial to themselves and their colleagues. An engaged focus group will also help drive user acceptance and organizational change in a positive way. If they walk away from the focus group feeling heard and their needs well met, they'll most likely communicate positively about the service catalog when interacting with their colleagues by displaying excitement about the release of the tool.

When gauging user acceptance of the catalog, the use of focus groups and a method of collecting and analyzing focus group feedback is essential for understanding what the user community is thinking about the catalog. It's a good idea to keep the collected feedback structured and organized. This means providing the capability to report issues and provide feedback. This may be accomplished through a service catalog entry, spreadsheet, SharePoint site, or even the tool itself. The point is to collect as much information as possible from the focus group during the pilot. You should begin collecting data as soon as the pilot starts. Continue collecting and acting on the feedback until all of issues and/or concerns have been mitigated. This may continue up to the release date.

Key data points to collect in the tool feedback approach are:

- **Who.** Identifying the user and what area of the organization that they represent facilitates conversation about the feedback. Being able to engage the focus group members about their feedback results in open communication between developers and end users.
- **What.** Tracking the issue or feedback being reported is key to improving the service desk for the users. The major goal is to collect feedback and any issues with the interface or the services presented. It's wise to collect as much information as possible to understand what the user was doing when the issue occurred and how this relates to what the user was expecting to happen.
- **When.** Capturing when an issue occurred is also important. The benefit is that it can be used to diagnose a problem. For example, if a user reports that an error message was generated, the timestamp can be used to match the error in the appropriate log file, which helps for quick diagnosis and resolution.

Now that the feedback and issues have been collected, they can be discussed and analyzed amongst the project team and any changes can be incorporated into the service catalog. Whether it's a customization, configuration, or an opportunity to better define any training or job aids, the focus group will be invaluable, as they'll have contributed to one of the most critical areas of the service catalog effort: **acceptance**.

6. Deploy the catalog to your users

With the catalog built, refined, and put through its paces with the help of the focus group, it's now time to release the catalog to the user community. On a technical level, this entails bringing services online within the tool by publishing them, enabling the links to the catalog so that end users can reach the services, and finally communicating to your users that the catalog is open for business. Having a strategic communication plan will go a long way in preparing your users for the new catalog. In general, a communication plan will state the goals of the project, have executive sponsorship, and outline communication channels to be used and how to send a solid message for each channel.

A note from the executive sponsor is a critical piece as it shows that the leadership has a stake in the

success of the service catalog. Utilizing multiple communication channels that are available greatly increases the chances of reaching as many people as possible.

Those channels should include:

- **Word of mouth.** Ask the members of the focus group(s) to share how their input was used and how the service catalog has helped them to do their work more efficiently.
- **Email.** Using a short series of email messages that lead up to the launch is an effective way to build momentum for the release of the service catalog.
- **Web.** Having a short story or blog post on the corporate intranet will help gain visibility and awareness for the project.
- **Signage.** Placing quick reference cards, signs, and posters in common areas of the office that advertise the benefits of the service catalog is helpful.
- **Info-sessions.** Holding an event where the user community can come to receive information about the service catalog is a great way to accelerate awareness and adoption. It's common to have giveaways at these events—such as mugs, pens, badge lanyards, etc.—to help get the word out and generate end-user interest. You could go so far as making it an event or party to gain even greater interest and mindshare of the end-user community.

Executing the communication plan happens throughout the lifecycle of the project, but it's best practice to communicate early and often. This means that you should start communicating the release of the catalog to end users in a few phases. Start with an initial communication that states what is being done and why. The next communication should describe the benefits of the catalog, which will start generating positive anticipation around the service catalog. In the days prior to the release, let your users know that it's almost here. Finally, on the day of the release, communicate once again using the channels noted above.

The catalog is considered to be deployed when the project moves from the development group to the operations and maintenance teams to handle any ongoing support.

7. Use metrics for continual improvement

Understanding what works and what user behavior indicates a need for improvement are crucial aspects of reporting and metrics. Only what is measured can be addressed, so identifying what and how to measure are critical to achieving clarity around how well the service catalog is performing.

Developing measurements, tracking, and reporting on them are accomplished in a manner similar to how the service catalog was defined and built. Overall, it's important to outline what needs to be presented to management and when to demonstrate the value of the time and effort put into the service catalog has been realized. Being able to quantify results in terms of savings in money and/or labor is the key point when developing metrics.

Common metrics include:

- Most and least commonly requested services
- The number of unique visitors to the catalog
- The number of services delivered on time and delayed services based on established service level agreements (SLAs)
- Correlation between user requests to the catalog and those calling the service desk
- Cost of delivering services to users (before and after the service catalog launch)

Metrics and key performance indicators (KPIs) should be reviewed by service owners and the business on a weekly basis at first to determine if services should be added, modified, or even removed from the catalog. This provides the strategic alignment between IT and the business. The frequency of reviews can be modified to monthly or quarterly as the business sees fit once the service catalog is well established.

Successful service catalogs

In the end, presenting a well-thought-out service catalog, which is strategically aligned with the goals of the organization, allows for the realization of value not only to leadership, but also to the user community who benefits the most from the service catalog.

Enabling rapid access to products and services that are not only easy to find and request but also are designed to be easily fulfilled will move the organization towards realizing a digital workplace through self-service. You'll know that you have selected the right tool when the metrics that are collected show a decrease in service desk calls, shorter response times on delivered services, and fewer re-opened requests that require rework. Finally, using the data gathered to validate the effectiveness of the services being provided will drive continual improvement. And continual improvement makes possible constant innovation within your organization—and the advancements that result will leave a lasting, positive impact on the user community.

If you're considering [BMC Helix ITSM](#) or another technology investment and could use planning assistance to achieve a user-friendly end result, fill out our [contact form](#) to speak with someone about our [implementation services](#).