

A Case Study From Government

 **APMG** International

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INTRODUCTION

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One of the key reforms in government was to brigade a number of government agencies (departments that were staffed and run by public servants but were not funded by the public purse and were expected to charge other government departments for their services) under one commercial structure.

The purpose of the new organisation was to support the procurement and acquisition process of public sector organisations in the UK through policy and process guidance and the negotiation of overarching service and provision frameworks. This was intended to improve value for money to the taxpayer, optimising the level of taxpayer's equity directed towards the delivery of services.

The organisation supported initiatives to encourage better supplier relations, sustainable procurement, the benefits of engaging smaller suppliers and the potential of eProcurement.

The brigaded agencies included a government department focused on IT best practices and Technology innovation, a FM organisation that focused on supplying everything from building works to carpeting and a body that managed all aspects of building works in the Civil Estate, from creating project management best practice through to management of programmes and projects.

It had been decided that each of the agencies had similar processes and procedures, for example use of service catalogues to showcase what was on offer, and service desk arrangements and that consolidation would reduce overheads and offer the opportunity to significantly improve services to government at large. One obvious example was that instead of working with multiple agencies, a one stop shop could be created where a department could make procurement and planning arrangements for a new office that included everything from IT to pens and paper, and that services could extend to wider government that would make, for example, building and provisioning a new hospital cheaper and more efficiently.

The business information needs were (necessarily) complex, nuanced and engendered many dependencies, requiring detailed analysis before any decisions could be made regarding the services that could be offered by the new agency. This meant that a Strategic approach to information management was to be put in place. One component of the programme (creation of the business service focused service desk) is the subject of this white paper.

GOVERNANCE, STRATEGY, IMPROVEMENT & OPERATION

The agency decided that a key service for government customers, particularly in the light that the new agency would be offering a range of services previously obtainable from other agencies, would be a service desk that would immediately direct callers/enquiries to the party that could provide assistance.

As an initial step it was clear that the large-scale developments would have repercussions across all the business departments of the agencies. An approach was agreed to define Governance and Strategy and from there examine the Improvement that would be possible as a result of the well-defined developments required see Figure 1).

Operation needs would be recognised early in the lifecycle of development and definition of Key Performance Indicators and Critical Success Factors (KPI and CSF), would drive the outcomes required.

Operation needs would be recognised early in the lifecycle of development

Drivers

-  Need
-  Value
-  Mission
-  Capability

Perspectives

-  Business
-  Data
-  Service
-  Technology

Domains

-  Governance
-  Strategy
-  Improvement
-  Operation



Figure 1. The BiSL next model

It was identified that good governance required creation of strategic direction/development in accordance with Policy. The CEO of the agency directed that best practice principles should apply to all Policy making regarding the services to be built and deployed and that customer-centric policies regarding information management must be created by the business and supported by, inter alia, IT.

The Business Drivers were (Figure 2) to consider the need, value, mission and capability elements that that would apply to the overall design of the business services. Need (for the services) and Value (both actual and perceived) were carefully considered in the context of the business demand from customers; if a service had no value, it was unlikely to be needed---and vice versa.



Figure 2. The Drivers in the BiSL next model

Examples of specific deficiencies in skills were creation of taxonomies of information,

After consultation with business stakeholders, Policies were agreed and communicated and a Strategy based on strategic business service design undertaken; though every service desk activity would be supported by IT (including acquisition of service desk software), the project was led by business managers. A strategic decision (based on analysis of the Mission and Capability) identified that business information skills were lacking entirely in IT and though present in some lines of business they were not professional. Examples of specific deficiencies in skills were creation of taxonomies of information, data design, the ability to elaborate business requirements and the skills to create information/data dependencies that would provide the degree of accurate and appropriate data to the service desk and thus to customers.

Analysis of Business, Information, Service and Technology, (figure 3) requirements was exhaustive and focused on each perspective individually and collectively in order to build a complete picture of requirements. IT demands to use Agile methods at this stage were dismissed because of the complexity involved and because developers were lacking business information skills. The Senior Responsible Owner (a senior director) in charge of the project immediately requested that HR hire two librarians.

No automation of any scale was present.



Figure 3. Perspectives

The issues of Improvement and Operation were discussed in detail and KPI/ CSF identified for the former and ITIL processes identified as suitable for managing requests, incidents, problems and so on, which was in line with BiSL next recommendations regarding using well researched best practices. Also of relevance here is that although the processes/procedures of ITIL were adapted, these adaptations were designed by the librarians in consultation with business customers and in line with Policies regarding business security, availability and quality because ITIL experts were capable only of designing services that were suited to technology infrastructure.

BUSINESS MANAGEMENT OR IT?

Every organisation arranges purchasing differently. One of the early considerations was the issue of IT being the focus for project best practice (because modern business is IT) or building management (one of the brigaded agencies specialised in large scale programme/project management) where many years of experience of very large-scale project management existed. In this instance, IT project management was deemed no different to any other form of project management.

A similar argument existed over the definition of 'procurement best practice'. Another agency had for many years operated as a buying agency for government departments across the country and though purchasing of specialist IT software for the service desk would be an important Technology component, it was decided that procurement of the entirety of the service desk project would be run under business procurement auspices with IT taking a subordinate role for specific elements.

Standardisation of processes and integration of business and IT practices would not have been possible without attention being paid to the four domains

As a 'by product' of these considerations, the agency made a controversial decision to term all IT guidance as 'good' practice and reserve the 'best' terminology for long proven business practices. In this sense, it became clear that the new service desk was the precursor of the important decision to integrate all business and IT practices (necessitating additional Policy development) under one strand of management.

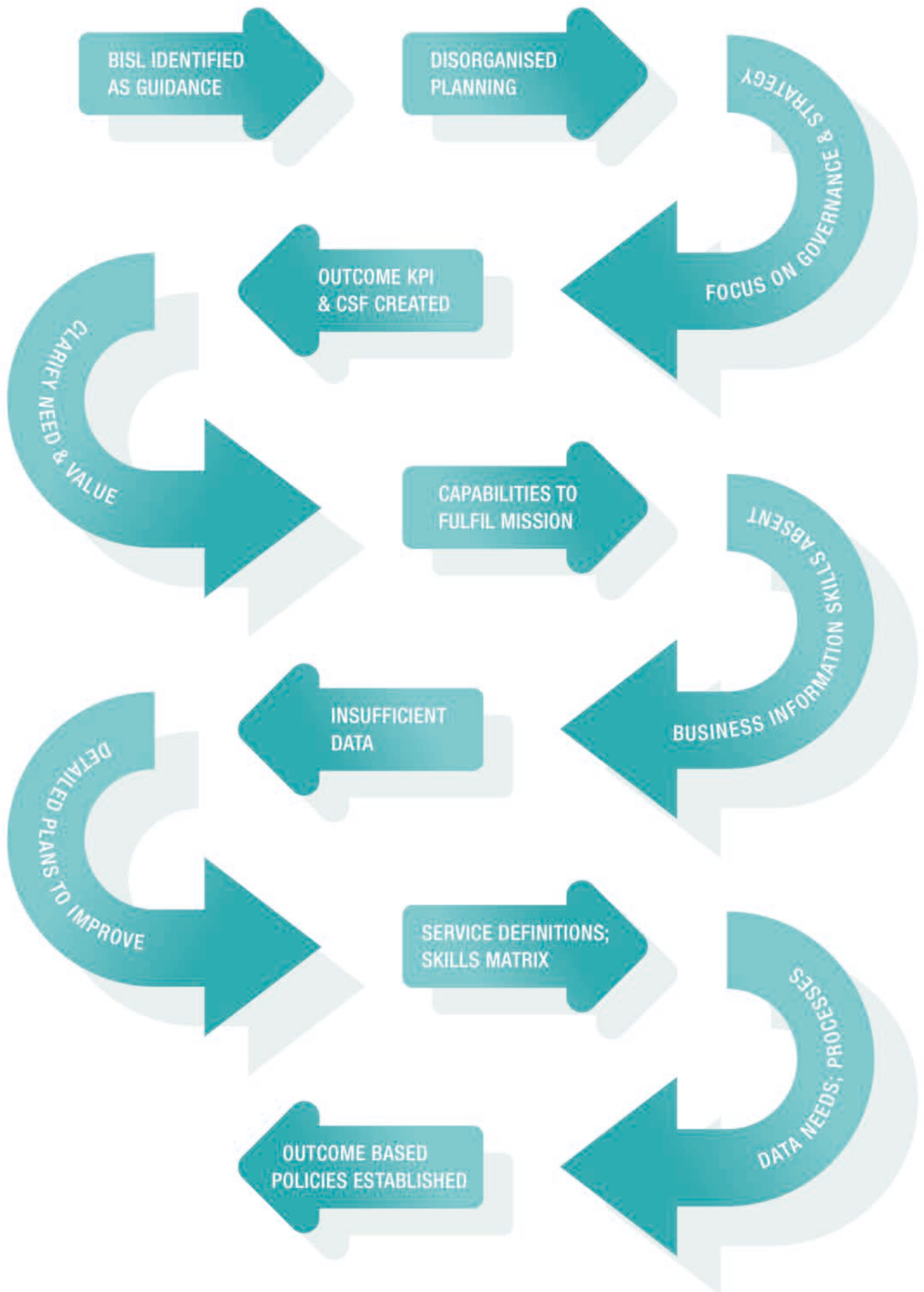
A result was that all best practices, from procurement to use of various goods or service catalogues and any form of advice regarding process work were forensically examined and where possible integrated, or at worst, aligned as far as possible. The standardisation of processes and integration of business and IT practices would not have been possible without attention being paid to the four domains, four drivers and four perspectives in the BiSL next model.

PRACTICAL IMPLEMENTATION

Cross training in the organisation where there were separate purchasing departments for example, with multiple 'category' managers with substantive knowledge of their particular market and knowledge of the needs of their own organisation was put forward as mandatory. Over time, it became clear that IT was (and is) different from 'standard' business FM and that it would be a retrograde step to attempt to enforce a single approach to procurement because expertise was so obviously specialised in many areas of business and IT. Once more it was analysis of the business information and data that enabled the decision to be made and that allowed an accurate description of business and IT data models, to ensure data dependencies were accurately dawn up and actioned.

As an Improvement measure, it was decided to establish FM as an over-arching principle of Governance and to brigade similar management processes and techniques under a business-first approach with specialist IT knowledge being 'sub-categories' of good practice.

The four perspectives in the model were used to analyse the need (and value) of managing contracts and contacts with external suppliers; the aim was to ensure that management targeted the sustainable guarantee of the quality, stability and continuity of the services provided by the suppliers to external customers and the reduction of the costs thereof. Contract management also involved negotiating the expansion of tasks (eg higher volume due to the expansion of locations or changes in demand as a result of the introduction of new services). Supplier management became part of overall contract management and assessed the performance of the suppliers. In each case the information and data was analysed to ensure completeness and identification of dependencies. The result was described and accepted as 'best of breed' contract management.



PROVIDING THE SERVICES

Business information design regarding the services offered to the ministries, via the service desk, involved extensive interviewing and analysis of representatives of numerous government ministries and agencies (at all levels from Ministerial, Executive and coal face) to properly define and design the new or improved services to be offered. The 'soft skills' described in BiSL next were used as a template for an adapted skills matrix for current and future employees; similarly the workload calculation guidance was used to determine staffing levels and based on all of the evidential criteria, staff training and development plans were drawn up and training planned to be just-in-time to be available as service design was completed, and in plenty of time for go-live rehearsals.

Some activities were managed in the fashion termed 'Agile', for example creation of training packages and staff training. The method of development and deployment was assessed on the basis of risk and complexity. Among the many aspects of the services the following activities needed to be designed commensurate with the information needs;

- monitoring that the service is provided as described and agreed in SLA with the customer;
- contract administration where suppliers were involved;
- managing and maintaining the relationships;
- securing 'value for money' from use of departmental catalogue use;
- seek and implement improvements;
- management of improvements (changes);
- continuous analysis of new or changed needs of the customer and supplier organisations.

The service desk was required to be available continuously from 0730 to 1900 (unusual for government and therefore subject to trade union approvals). The usual telephone answering services were to be in place also electronic services via email and the secure information portal used for inter-departmental communication. **Librarians were heavily involved in the information design aspects of 'help' scripts and adaptation of IT 'Service Desk' software to support mostly IT-driven business information services and also services peripheral to these such as answering FAQ and managing general enquiries; such enquiries were wide-ranging, including Ministerial enquiries about how to locate the CEO!**

Service management was established on three levels:

- At strategic level: the management of the customer maintains the relationship with the agency. This relationship not only focuses on existing services, but also on new initiatives.
- At the tactical level, contract management deals with the core tasks: contract management, relationship management, managing and checking the SLA or contract, and possibly processing adjustments in the SLA/contract.
- At the operational level, where the products and services are actually delivered. Operation in the first iteration of BiSL was focused at this level and dealt with day-to-day 'help desk' activities that of course still exist, but are now often automated. Daily issues were solved here by service desk staff; or escalated to the desk manager.

SERVICE DESK & SLA / CONTRACT MANAGEMENT

Over time, the success of the business service desk led to expansion of services and greater responsibilities (and of course to increases in staff....). The initial operational contract management for the services of the enterprise included the service desk and was soon expanded to location management and overall service management. And this embraced more products and services than you might think. The Table below provides an overview of possible products and services for which a contract (or SLA) was concluded and with which the service desk was linked. **Business information management led directly to the Policy that individual ministries should not order and receive goods, products or services, for themselves, because a single negotiating body having full knowledge of all of the data points regarding negotiations was a powerful engine for cost savings and efficiency.**



THE EXPANDED SERVICE DESK

PRODUCT / SERVICE	SLA / CONTRACT
BUILDING & INSTALLATIONS	Building-related maintenance, maintenance of technical installations, cleaning, electricals, plumbing, IT, external greenery and paving
GOODS	Furniture, loose furnishings, art, standard IT equipment, telephony, stationery, plants and containers, wall decorations
HOUSEKEEPING	Catering, landscaping, waste disposal, transportation, clothing, meetings, linen supply
EXTERNAL STAFF	Advisors, temporary workers, secondment, security
LOGISTICS STAFF	Courier services, postal services, transport arrangements, logistics about people movements
OFFICE SUPPLIES AND PRINTING	All office supplies, paper, printed matter.
AUTOMATION	Hardware and software (maintenance) Telephony (smartphones etc.)

FINALLY

BiSL next provided the necessary strategic guidance to establish sensible over-arching principles and policies for a complex transformation of data requirements. The guidance was also central to the overall programme being designed in such a way that appropriate best practices and expertise were available to manage and control the different facets of the overall design.





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