serviceTALK

ITIL certification renewal: great news for members — page 8

Where's the value in value...

if your consumers don't see it?

Also in this issue:

Business transformation at Bletchley

Three green avenues to sustainable ITSM

The cream and jam of information security

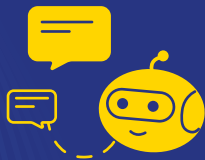**Seven steps to service support automation**

PERCEPTION

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Spring is in the air!

The clocks have moved forward, the flowers are in bloom, so it must be time for the spring issue of ServiceTalk, the itSMF UK member magazine. Once again we bring you a selection of articles from our subject matter experts, covering everything from security operations centres and getting the cyber message across to the value of value, service support automation and a greener approach to ITSM.

A special welcome to sustainability champion Dr Tuuli Bell, who is writing in ServiceTalk for the first time, as is DWP's Simon Rolley, who shares his thoughts about attending our business simulation at the National Museum of Computing at Bletchley Park.

The Bletchley event is just one a number of recent and forthcoming events running at interesting venues, an initiative to provide members with a little extra value and entice them to learning experiences away from the office. You'll find information on some other simulations and member events in the calendar on the next page.

You might also be interested in our pilot mentoring scheme for which we are seeking mentees (further details below) or the exciting plans to offer ITIL CPD points for attending events, writing blogs, and a whole range of other member activities. Find out more about this on page 8.

This issue of ServiceTalk is published to coincide with our attendance at the Service Desk and IT Support Show (SITS24) in London – an event that we've supported for many years. It provides the itSMF UK team with a really good opportunity to reach out to members of the service management community – those we know well and those who don't know about us yet. We'll be on stand 117 this year, so if you happen to be attending do pop by and say hello. We even have an exciting new game with a chance to win a place at ITSM24, so I hope you can make it.

Of course, you don't have to be at SITS to talk to the itSMF team. We're always available by phone (0118 918 6500) or by email **membership@itsmf.co.uk** and we'd love to hear from you with any questions or comments about member services.

Mark Lillycrop
mark.lillycrop@itsmf.co.uk

SITS 24
THE **SERVICE DESK & IT SUPPORT** SHOW
17-18 APRIL 2024
ExCeL LONDON

Mentoring pilot scheme: mentees invited

itSMF UK are excited to announce the launch of a new mentoring service which will be free and – in due course – available to all members.

The Mentorship programme is designed to match mentors with mentees to aid personal and professional development and to ensure knowledge and expertise are shared for the benefit of the wider ITSM community.

The formal programme is under development, but from June/July a pilot will be rolled out. We are inviting anyone who feels they would benefit from having a mentor to apply – just fill out the form at **itsmf.co.uk/mentorship.**

We anticipate significant interest, but we can only take five mentees for the first phase of the pilot, so if you are interested please respond quickly.

The initial pilot will include an onboarding session for successful applicants and a one hour, 1-1 session per month. Applicants must be members and will be required to complete the free skills self-assessment at **www.itsmf. co.uk/psmf.**

Please visit **itsmf.co.uk/mentorship** for further information.

Haven't heard from us recently?

If you're a member of itSMF UK you should be receiving regular communications from us, unless you've asked specifically not to be contacted. Our database only works, though, if your details are up to date. If you haven't checked your profile recently, why not log into the member area and check what information we're holding about you? If you haven't visited for a while, just contact the office and we will help you find your way around.

To review your profile, click on the Members' Area button at **www.itsmf.co.uk.**

Check out our events schedule: there's so much to choose from

itSMF UK has always sought to provide the right information and guidance to members to help them excel in their service management roles, and to this end we've developed a range of webinars, masterclasses and forums to fit every need.

Although the majority of our events are still delivered virtually – via Zoom, Teams, or ClickMeeting – we're now beginning to run more face-to-face meetings and member meet-ups. Going forward, we aim to offer a balance of online and physical events to suit all members, so please let us have your views and feedback.

Our webinars – all free to members – offer a great opportunity to join one of our subject matter experts for a focused hour of content and Q&A. And after the event, a recording can be found in the member area of the website.

Our in-depth masterclasses take a fresh approach to the challenges faced by today's ITSM practitioners. They are presented by experienced facilitators from within the industry, providing real-world guidance and practical advice – with the objective of developing new skills and sharing experiences with other members.

SM Forums and Sector Spotlights are three-hour online events, usually with four or five speakers and a panel discussion. They highlight key service management topics through the lens of a particular sector, such as healthcare or higher education, or else a wide-ranging subject such as SIAM. Forums and Spotlights are freely available to both members and non-members.

Our Introduction to ITSM is for apprentices, graduates and those moving into ITSM for the first time, focusing on best practice in key areas in ITSM and how they work together. The Intro comes in two parts. Part 2 is an interactive business simulation that allows the theory learned during Part 1 to be applied in a realistic educational and fun environment.

Members can also benefit from a range of simulations events – some face to face at unusual locations – and our one-hour 'lunch & learn' sessions on a range of different topics are proving to be very popular.

We hope you can join us for one of our virtual or face-to-face events in the near future. The list continues to expand, so please watch the website **www.itsmf.co.uk/** for the latest news.

For more information on CPD points, see page 8.

	PRICE	CPD POINTS	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
MASTERCLASSES														
AI Feasibility	£295	7			7 (O)									
Availability and Capacity Management	£295	7					14-15 (O)							
Business & IT Alignment	£295	7					11-12 (O)							
Change & Release Management	£295	7		6 (O)							17 (O)			
Continual Improvement	£295	7					16 (O)							
Demonstrating the Value of IT	£295	7			5 (O)									
Designing the right XLAs	£295	7			14 (O)						19 (O)			
Digital Operating Model	£295	7					21 (O)							
Implementing XLAs	£295	7						13 (O)					7 (O)	
Introduction to XLAs	£295	7	30 (O)			23 (O)			9 (O)			1 (O)		
Human-centred design for ITSM	£295	7				19 (O)								
Introduction to ITSM (Part One)	£99	7				24 (O)						3 (O)		
Introduction to ITSM (Part Two)	£99	7				25 (O)						4 (O)		
IT Service Continuity Management	£295	7					23-24 (O)							
IT Asset Management	£295	7		29 (O)									19 (O)	
Knowledge Management (KCS)	£295	7		27-28 (O)										
Major Incident Management	£295	7		27-28 (O)							24-25 (O)			
Post Incident Review	£295	7						18-19 (O)						
Problem Management	£295	7			21-22 (O)							10-11 (O)		
Re-imagining the CAB	£295	7				23-24 (O)								
Sustainability	£295	7					20 (O)							
SIMULATIONS														
Challenge Cup 2024	FREE	4										TBC (O)		
ITSM/DevOps	FREE	7			20 (MK)				11 (S)					
MEMBER MEET-UPS														
Member meet-up / Lunch & Learn	FREE	1 or 4*			8 (O), 12 (G), 26 (O)	9 (O), 17 (B), 24 (O), 30 (O)		7 (O)						
Communitites of Practice	FREE	1 or 4*		22 (O)										
LEADERSHIP COUNCIL														
Council Meetings	FREE	1	17 (O)	21 (O)	20 (O)	17 (O)	14 (O)	12 (O)	10 (O)		11 (O)	16 (O)	TBC	11 (O)
FORUMS & WEBINARS														
XLA24	FREE	7						4 (W)						
Service Management Forums	FREE	4		20 (O)		30 (O)	16 (O)	TBC (O)				TBC (O)		
Webinars	FREE	1	18 (O)	1 (O)	6 (O)	23 (O)								
ANNUAL CONFERENCE														
ITSM24 Conference & Awards	SEE WEB	7 or 15*											11-12 (R)	

PSMA24

And the winner is...

The call for nominations for this year's Professional Service Management Awards (PSMA24) is now open. Why not give some thought to the outstanding service management professionals in your organisation who deserve a place on our platform this year? We'd like to hear about the great teamwork, ingenious solutions to problems, unsung heroes and thought leaders that have really made a difference.

PSMA offers a perfect opportunity to highlight the achievements of IT service management individuals and teams whose skills, commitment and imagination have marked them out for special recognition.

We will also be running another Challenge Cup competition this year, following the huge success of last year's contest – details coming shortly.

Winners will be announced at the gala dinner on Monday 11th November during Conference. With a fine menu, music and celebration, plus entertainment from our very special guest Ellie Taylor, this will surely be an evening not to miss.

You can check out the call for nominations or book your dinner tickets on the itSMF UK website.

PROFESSIONAL SERVICE MANAGEMENT
AWARDS
11TH NOVEMBER 2024

Winners and Finalists at PSMA23

Paul Rappaport Lifetime Achievement Award
WINNER
Barclay Rae

Dave Jones Inspirational Leadership Award
WINNER
Matthew Burrows

Ashley Hanna Contributor of the Year
WINNER
Keith Reeves – *Digital Health and Care Wales*

FINALISTS
David Booth – *Department for Transport*
Gabriele Rutkovskiene – *Barclays Bank*

Service Management Team of the Year
WINNER
BT - *ITIL Practice & Control*

FINALISTS
Mason Advisory – *AGEM SDI Accreditation Programme*
Ministry of Justice Glass Tube
Retail Assist – *Customer Assurance*
The Body Shop – *The Golden Quarter in Retail*
Vodafone – *From Problem to Reliability Management*

Service Innovation of the Year
WINNER
Vodafone – *Service Compliance*

FINALISTS
Barclays Bank – *IPC Controls Automation*
Barclays Bank – *ITSM University*
Nestle – *Service Modernisation*
Vodafone – *Extending SM with Global Calendar*

Young ITSM Professional
WINNER
Emma Irwin – *BT*

HIGHLY COMMENDED
Tomas Stoneham – *Direct Line Group*

FINALISTS
Sammy Allanson – *Mason Advisory*
Dan Brown – *Housing 21*

Thought Leadership Award
WINNER
Ian Macdonald – *Edenfield IT Consulting*

Content of the Year
WINNER
Chris Kingsbury – *Measuring Customer Experience*

Challenge Cup 2023
WINNER
Team Informa

ITSM24

#ITSM24

MADEJSKI STADIUM · READING · 11-12th NOV

Book your place at Europe's leading service management conference

With more than 50 presentations from across the industry, ITSM24 on 11th-12th November offers a plethora of great content, discussions and networking opportunities. The agenda, to be announced shortly, is our best to date. We've certainly had a record number of synopses to choose from, and that means we can bring you the very best in service management best practice.

What makes our Conference unique is the insight and guidance provided by our member organisations in the public and private sectors. This year we have speakers from:

- Allianz
- Aviva
- Barclays Bank
- BT
- Direct Line Group
- DLA Piper
- DWP
- Equiti Capital
- Home Office
- IPO
- Irwin Mitchell
- ITV
- MoD
- MS Amlin
- NHS England
- Open University
- Pearson
- Prolific
- Square Enix
- University of Birmingham
- Vodafone
- **... and many more**

Not surprisingly the big topics of 2024 – such as AI-Ops, cyber, customer experience and sustainability – are well represented on the programme, but there's also plenty of content on service integration, transformation, agile and DevOps, communities of practice, change and problem management, and humanising ITSM. Whatever you're currently focusing on, you will find hints, tips and practical support from likeminded professionals on the agenda.

This year we are back at the popular Madejski Stadium in Reading and the event will be all about networking and interaction, from the welcome reception in Club 106 on Sunday evening to the many breakout options and discussions, and of course our Professional Service Management Awards dinner on Monday. We're also delighted to welcome inspirational leader and performance coach Scotty Mills as our opening keynote.

Scotty Mills
(Keynote speaker)

Ellie Taylor
(Awards special guest)

Book your place today and take advantage of our super early bird discount

Book your place at
www.itsmf.co.uk/itsm24/

ITIL certification renewal: great news for itSMF UK members

As ITIL represents the globally recognised best practice framework for IT Service Management, it's essential for IT professionals to keep their certifications current. That's the message from PeopleCert, who own and manage the ITIL qualification scheme. All individuals who hold one or more ITIL 4 certification will need to renew them within three years from their original certification date in order to keep them current.

Over recent months itSMF UK have been working closely with PeopleCert to help establish precisely what the options are for those seeking to renew existing qualifications. At a recent itSMF UK webinar, Markus Bause, VP Product at PeopleCert, outlined the three routes that are now available:

- **Collect and log CPD points**
  Certification renewal requires accumulating 20 annual CPD points per annum for three consecutive years and maintaining an active PeopleCert Plus Membership.

- **Take further courses and certification**
  Candidates can renew any certification within a product suite such as ITIL 4 by completing an extra course and passing its exam in the same suite before the renew by date.

- **Retake existing certification**
  Candidates can renew their certification by retaking their original exam before the renewal date.

Markus also pointed out that no certification actually expires. Candidates not renewing a certification within three years will remain on the Successful Candidates Register (SCR) with a note indicating non-alignment with current requirements. Even if a certification has passed its renew-by date, it will still be accepted as a prerequisite for taking further certifications.

For the first renewal option, PeopleCert Plus Membership is required (subscription details can be found at peoplecert.org) but there are no further course or examination costs involved. Taking the CPD route will allow candidates to collect points from a range of activities such as attending events, taking part in forums and webinars and writing blogs and papers; in other words, there are many different ways to reach the renewal target without formal study.

PeopleCert have divided CPD-earning activities into three areas, Professional Experience, Professional Education and Community (examples of activities are given in Figure 1). A minimum of five of the 20 points required each year need to be within the Professional Experience category, but otherwise candidates are free to log points in any of the columns.

The good news for itSMF UK members is that we're now offering CPD points in all three categories. Thanks to an agreement with PeopleCert, we are the first organisation worldwide to offer ITIL CPD points against all of our member services and – through a combination of event attendance, speaking, writing, and contributing to online forums – you can log all 20 of the points required to satisfy the annual certification renewal. You can even earn points if you're interviewed as part of an ITSM maturity assessment or if you take part in our new mentoring scheme (to be rolled out over the summer). A two-day pass for ITSM24 alone will allow you to log 15 points – that's three quarters of the annual requirement.

We've added a CPD points column to the event schedule in this issue of ServiceTalk. Why not check out the list and start earning points towards your ITIL certification renewal? It's just another way that itSMF membership is supporting members' professional development in service management.

Certification renewal via CPD

Maintain certification currency by logging CPD points in professional experience, education, or community activities, as detailed below.

Professional Experience	Professional Education	Community
Professional practice: Applying best practice in the workplace	PeopleCert certifications	Organising industry / best practice related events
Coaching colleagues in relation to best practice	Other certifications from PeopleCert Accredited Training Organisations	Contributing to community discussion forums
Mentoring individuals or groups to support their development	Other certifications from non-PeopleCert Accredited Training Organisations	Authoring thought leadership
Work shadowing colleagues in relation to best practice	Professional qualifications from awarding bodies	Attending industry events
A minimum of 5 points in this category is required	E-learning	Volunteering to share your knowledge and experience
	Reading relevant books, publications, research, white papers etc.	
	Engaging with podcasts and webinars	

PeopleCert

Where's the value in value...

if your consumers don't see it?

Perception is reality, and if your consumers don't recognise value from what you do, they certainly will recognise cost. In the current economic climate where competitors will claim they can do what you do 'faster, better, cheaper', this isn't a good place to be. Ian MacDonald offers some pointers for demonstrating value.

In today's competitive marketplace, business consumers now want far more from their service provider than simply meeting service levels. With IT costs being one of their highest annual expenditures, consumers have an increasing expectation of gaining the maximum value from their investment and usage of the services provided.

Perception is reality. and if your consumers don't recognise value from what you do, they certainly will recognise cost. In the current economic climate where competitors will claim they can do what you do 'faster, better, cheaper', this isn't a good place to be.

Hottest ITSM trends

To avoid this, the mantra emanating from the latest ITSM best practice, journals and evangelists reflects the necessity for service providers to create and demonstrate value for stakeholders. It's now 'value over service'.

This message resonates strongly across the ITSM community with 'value demonstration' being cited as one of the hottest ITSM trends in recent research[1]. Respondents understand the importance of demonstrating value but perhaps also where practical guidance would be helpful. ('ITSM Trends for 2024, ITSM Tools, January 2024.)

Easier said than done?

But surely this should be easy? If we examine IT from a business value perspective, in many ways IT is the business as without IT most digital and IT enabled businesses would simply be unable to function. Therefore, value and worth of your service provision to your business consumers is obvious and shouldn't prove too much of a challenge to demonstrate.

But perhaps the above represents the biggest mistake we (IT) make when considering the value of IT to the business. Value is very much in the eye of the beholder (your sponsors, customers and users) so no matter how much the service provider promotes the worth of their services the ultimate decision on value remains solely with the consumer.

Ergo, if value is determined by your consumers, then how can you effectively demonstrate the value of your service provision if you don't understand what they value?

Understanding value

How consumers ultimately determine their view on value is based upon a combination of the following:

- **Outcomes:** Consumer outcomes that must be achieved
- **Expectation:** Consumer reference points against which performance is judged
- **Perception:** How well consumers feel their expectations are being met by their service provider.

Consumers will expect their outcomes to be achieved; after all why would they pay for a service if it doesn't help them achieve what's important for their success. Crucially though, consumers will typically make an overall judgement on 'value' based not just on *outcomes* but the gap between *expectation and perception.*

For example, a sponsor will expect to see a return on investment from their IT services such as increased sales and revenues. Assuming these outcomes are achieved, the sponsor may have an expectation of their services being affordable, but their perception is that they pay too much, and their service provider is too expensive. Here the sponsor is not convinced they are getting value and specifically value for money from their service provider.

The 7 givens – consumer expectations

So, what are the expectations of the consumer organisation? It's important to recognise that sponsors, customers and users have differing views on what value means to them. Therefore, managing expectations will need to recognise and reflect these differing perspectives.

To understand expectations, it's good to talk! However, in my corporate experience of working closely with consumers at every level, the following 'givens' can be considered a good start point (assuming 'you' are the service provider and 'we' are the consumer):

1. You demonstrate the contribution to our business (+/-) of the services provided.

2. Our CX/UX is reflected in your service reporting.

3. You understand the business impact on our customers when things go wrong.

4. You are proactive and show how you are improving our services.

5. We understand our IT costs and you can demonstrate these are competitive.

6. You provide us with options/choices on how to make more efficient use of IT.

7. You care about us and our customers.

This list is not exhaustive or weighted. However, these pointers can be helpful in determining how expectations can be met and perceptions positively influenced.

Value

Expectation(s)

GAP

Perception(s)

Where's the value in value... if your consumers don't see it?

The 7 building blocks – getting started

Consumer insight is key to developing a successful 'value strategy' that enables the service provider to demonstrate the value of their services and delivery capabilities. Some key considerations in developing an approach include:

1 Remember consumers determine 'value'.

2 There are differing expectations of value (sponsor, customer, user)

3 Consumers have expectations.

4 These need to be understood and strategies devised on how these will be managed.

5 Consumer perceptions of value need to be positively influenced.

6 Proactively market, target and promote 'consumer value'.

7 Communicate value in a language your consumers will understand.

The following seven initiatives are suggested building blocks to kick start your value strategy:

Building Blocks	The 7 Givens
Create and communicate a value proposition to 'promote the consumer value' of your services	**1**
Develop and produce business outcome-based service measures and reporting	**1** **3** **7**
Develop experience level agreements (XLAs) to report CX/UX	**2** **7**
Benchmark IT costs & align IT costs for your IT services to create cost transparency	**5** **6**
Establish MIM as a critical capability with a robust communications plan to provide consumer stakeholders with trusted, timely and frequent updates	**3** **7**
Ensure continual Improvement is business led with benefits reported in business terms	**4** **6** **7**
Develop a communication plan to promote how consumer expectations are being addressed to positively influence consumer perceptions	**7**

Reflection

Your consumers will over time have an expectation of increasing 'value' from their investment in the services you provide. This requires a strategic shift in focus by service providers from service to value. The importance of this shift is quite simple... perception is reality. Where consumers are unsure of value then this brings cost into sharp focus. Remember, where consumers have choice, there will be many competitors who will claim they can what you do *better, faster, cheaper!*

Ian MacDonald

Ian MacDonald is an award-winning ITSM consultant, author and trainer.

The cream and jam of information security

Information security can be a pain at times. Most people understand that the controls are there ultimately to help us to keep our data safe. But how are they viewed, and how willingly do people go along with them? Richard Horton considers some effective ways to get the message across.

Ever found yourself unable to logon because your phone is out of charge and you need to respond to a multi-factor authentication prompt? Ever wanted to sit a proctored exam and found yourself unable to use your work laptop because you don't have admin rights on it? Ever wanted to implement something and found your way barred because you haven't cleared a security threshold, maybe not introducing multi factor authentication to make life difficult for other people?

Information security can be a pain at times. Unfortunately IT systems just don't know who we are and that our intentions are true. And with the use of Cloud Services becoming more and more prevalent, being able to differentiate between an honest user and a malevolent hacker becomes a higher profile activity. You can see this in the progression of information security standards. Cyber Essentials and ISO27001 introduced controls in 2022 which are designed to check that we are putting appropriate Cloud strategies and controls in place.

I think most people understand that these controls are there ultimately to help us, through keeping our data safe. But how are they viewed, and how willingly do people go along with them? Or to put it another way, even if our security controls make it easier to do things right than wrong, we probably have considerable power to cause harm to our organisations by misusing data. This is where I'd like to suggest that it is not just what technical controls we use that matter, but also how we educate people.

Education is a strong thread in ISO27001 and it was going down that path that led us in NIHR CRNCC to focus on it. We already have various bits of mandatory training to do from our host organisations. Why should we do more ? Well, the generic training will tell us about setting strong passwords and the like, but it won't tell us which Cloud services we can use, or how to find out whether it is OK to use a new one. We put together a context-specific awareness programme called BE Safe (that was before COVID!) and there is only one question at the end of it: do you know what you need to know to keep information safe in your job? Now I get that more mandatory training is not the most popular answer. I know that it is no one's favourite task or number 1 priority. I give people plenty of time to do it, and am gentle in chasing those who drag their heels. I also make a point of going to team meetings (by invitation) to talk about it and answer questions specific to their context.

If BE Safe is the bread and butter, the jam comes with my monthly blogs. These have been a big hit. People at all levels of the organisation give enthusiastic feedback as to how they help them understand information security issues better and say they actually enjoy reading them. How does that work? Well, I try to think as a user and be aware of what can easily go wrong or be misunderstood. I'm part of various focus groups where I hear people talk about getting the best out of our technology, and I use that to feed ideas.

I keep an eye on trends and external issues that may be of relevance, and basically try to be aware of what might be topical.

The magic ingredient is thinking of a lateral angle to approach the subject from, and that is the bit people really like. I draw them in by talking about MOTs, road signs and road safety (for example) and then highlight a parallel within information security. Writing just happens to be the medium I've used. When I started I wondered if I would have enough to say. 87 blogs later I've not run out of ideas yet.

To extend my bread analogy, that brings me to the cream (clotted, of course). I've started doing information security briefings at all staff events. Previously when I've spoken to groups, I've often placed a burden on them, saying something like "we need you to do this task before the end of the month". I wanted to introduce a more positive message while still being thought-provoking. To get my foot in the door and get time on the agenda I promised to limit the session to 2 minutes and asked for the Countdown music to make sure I was held to that. The feedback has been even more positive than for the blogs with the creative approach going down really well. It also reaches significantly more people.

Through all of this I've made a point of stressing that we want people to ask questions if they are not sure, and people do ask. Yes, there have been near misses, but it's great that people have the confidence to ask, and that we are able to guide them.

There are a number of things that have made a difference in getting to this point, and my advice would be:
- **Take time to get education right for your context** – I didn't work all this out in a day and some of it has evolved over years. I think it gives it more credibility and a better fit.
- **Listen to what is going on, and adapt accordingly.** Think like a user.
- **Try to get people to think out of the box.** We all know we shouldn't fall for a phishing email. How can you put a different slant on this that helps people realise what might trick them?
- **Take advice from your education experts** – what formats and forums will work in your context?
- **ISO27001 has really helped us** and is designed to work for organisations of all sizes.
- **There but for the grace of God go I!** Yes, we should celebrate success (as I'm doing here), but we need to stay aware that we are not perfect, and could be the next cyber victim. That helps to sharpen the mind, and often leads to the next idea.

Or to put it another way:

- Start where you are.
- Progress iteratively with feedback.
- Collaborate and promote visibility.
- Keep it simple and practical.

(Other ITIL Guiding Principles are also available !)

Richard has family links to both Devon and Cornwall so doesn't take sides on whether the jam or cream should go on top.

Richard Horton

Richard Horton is Service Management Lead at NIHR CRNCC. He implemented an ISO27001 Information Security Management System in 2017 and has been improving it ever since. He is also a former itSMF UK Director with a history of running itSMF groups and events, and a current itSMF International Director.

Seven steps to service support automation

Chris Good explores the different types of automation available for service support, and describes the key steps towards effective implementation.

Unless you've been on an isolated beach disconnected from the world in recent years, 'automation' continues to be one of the hottest tech topics around. From robotics to artificial intelligence, there are many different automation concepts spanning different industries. Regardless of industry, the aims are the same: to improve process and task efficiency, productivity, accuracy, and consistency by reducing or eliminating the need for human intervention. But how do you realise that aim, and where do you start? In this article we explore the different types of automation in a service support context. We focus on internal user support (IT, HR, Finance, Facilities, etc) but most aspects could equally be applied to external customer facing support.

There are seven different types of service support automation:

1. **Diagnostics, analysis and reporting automation –** utilising tools to perform deep data and technical analytics. For example, performing correlation analysis on incidents to identify a common root cause and then recommend preventative (or at least impact reducing) action, or analysing the sentiment of users during their support experience and recommending remedial actions.

2. **Pre-emptive / proactive automation –** avoiding the need for the user to lift a finger by using monitoring, alerting and self-healing tools to address issues either a) before the user realises or b) by asking the user permission to execute a remedial action. Examples are automated application server failover solutions or identifying that a user's device is running slow, running background diagnostics, and performing clean-up activities.

3. **Self-service automation –** service portals and virtual agents (and voicebots) provide users with the ability to answer their own queries, self-resolve issues, or raise requests for products/services, all without the need for human agent assistance. Focusing on the user journey is key here.

4. **Human contact handling automation –** when a user does need to contact support, automation assists with identifying and authenticating the user to speed up the support process and provide an improved user experience. For example, a user calls the service desk and the contact centre software identifies the user from the number they are calling from, greets the user with their name, and provides contextual guidance. Authentication software can trigger a passcode to a multi-factor authentication solution, avoiding the need to perform this activity manually.

5. **Ticket routing automation –** For service requests, routing should be pre-determined by the specific fulfilment

1. Diagnostics, Analysis & Reporting	2. Pre-emptive / Proactive	3. Self-Service	4. Human Contact Handling	5. Ticket Routing	6. Resolution / Fulfilment Workflow	7. Knowledge Generation
Deep data and technical analytics tools, providing improved insight, fast.	Monitoring, alerting and self-healing tools taking action before the user experiences an issue.	Service Portals and Virtual Agents (Chatbots / Voicebots), placing support in the user's hands	User identification and authentication tools, accelerating and personalising the initial contact process.	SM tools, ITSM e.g.: SRs – pre-defined workflows. INs – routing based on impacted Service + Symptoms	Workflow automation tools, removing the need for humans to perform repetitive tasks.	SM GenAI tools that summarise ticket content, saving Agent time and improving quality.
Incident correlation analysis to identify a common root cause. Sentiment analysis to identify user undertones.	Server failovers. Device health checks and cleansing.	Utterance to intent to content matching. Immersive conversation flows. Summarised answers instead of results.	Phone number / SIP address identification. Authentication passcode triggering.	Impacted Service – Device: Symptom = Damaged. Route to onsite support (or digilockers).	Provision of virtual desktops. Password reset. Software installations.	Automated resolution notes. Automated new / updated Knowledge.
LogRhythm splunk> Medallia	nexthink 1E Lakeside	servicenow zendesk HubSpot	Amazon Connect twilio zoom	servicenow HALOITSM EASYViSTA ivanti	blueprism UiPath Power Automate	servicenow Microsoft

Inclusion of vendor names does not represent an endorsement. They are examples only.

mason**advisory**

workflow of the product/service that the user has requested. For incidents, routing can be based on the impacted service and the symptom (whether explicitly asked, or interpreted by predictive analytics tools based on free format text entered... although the latter is risky as this is still prone to wide degrees of error). For example, if the impacted service is 'laptop' and the symptom is 'damaged', is that something a remote service desk can help with? Probably not. Instead, prompt the user to provide as much detail as possible, and route to the onsite support team instead. You may also be able to trigger interim solutions for the user; for example, automatically request standing up a temporary virtual desktop instance while the user's work device is being repaired/replaced. For both incidents and service requests, an effective service catalogue is essential.

6. Resolution / fulfilment workflow automation – why request someone to stand up a temporary virtual desktop instance when automation tools can perform this task without human intervention? Most remote-based request catalogue items can be automated; look at each fulfilment workflow and cross reference to an automation solution. Password resets are usually the biggest win here, although ensure the solution covers all required information security and data protection aspects.

7. Knowledge generation automation – why ask your agents (or L2/3 engineers) to write resolution notes and associated knowledge articles when generative AI solutions could do this for them (or at least propose notes/KAs for the agent's approval/adjustment)?

7 types of service support automation available today

With all the above options available, it can be confusing to know where to start. We suggest starting wherever the biggest value resides. To identify this, try a seven-step approach:

1. Analyse your data. Two recommended initial areas of focus are a) Data related to the current contacts to your support team. This should include analyse of chat and voice transcripts, data entered by users into any bots or portals you provide, user journeys on your service portal, and user experience data such as customer satisfaction. b) Data related to request fulfilment and incident resolution activities (steps, teams involved, duration, effort, etc). If you have a well-defined request catalogue, requests are usually the best place to start.

2. Name each opportunity identified and add a value score to each based on the data you have analysed (Very High to Very Low, or 1 to 5).

3. Select the top ten and perform solution analysis on how these opportunities could be addressed by the 7 types of support automation listed above, and the specific automation tools required.

4. Name each solution and add an effort/cost score to each (Very High to Very Low, or 1 to 5). If you already utilise automation tools, some of the solutions may be quicker and easier to implement than you think.

5. Pick the opportunity that has the highest benefit for the lowest effort/cost. Deliver as a pilot using robust delivery management principles.

6. Review the benefits achieved and any lessons learned during the delivery phase. Establish a suitable governance structure, then work through the remaining 9 on the list.

7. Keep going, including re-analysing the latest service data to identify further improvement opportunities. It's worth noting, as per type 1 of the seven different types of automation, that tools are available to assist with this analysis, including time and motion studies and automation process documentation.

Service support automation streamlines operations, reduces manual effort, and enables IT departments to provide more reliable and efficient services to users. It contributes to enhanced productivity, improved customer satisfaction, and cost-effective IT service management.

Chris Good

Chris Good is Managing Consultant at Mason Advisory.

Explore the ITSM Universe at SITS – The Service Desk & IT Support Show

The countdown to SITS – The Service Desk & IT Support Show is on, as the exhibition returns to ExCeL London on the 17-18 April 2024.

Being the largest event in Europe focused on IT Service Management, the show anticipates over 3,000 visitors will be in attendance.

'A must if you're looking for an ITSM tool or just interested in the latest cutting-edge technology.'

ITSM vendors will showcase the latest solutions, aiming to enhance the efficiency of IT Service Delivery. Attendees will have the chance to engage with teams from 70+ companies, as they get personalised demos and compare service offerings. Exhibitors include Freshworks, Hornbill, Valiantys, TOPdesk and ManageEngine. Visitors can also meet the itSMF UK team on stand 117 at SITS and find out about their member services and events.

Event Director Alice Fulton said, "In the ever-evolving landscape of IT Service Management, innovation is the driving force. We can't wait to reunite the ITSM community this spring to see how the industry has changed in the last year."

She continued "Not only do we have exclusive sessions on the programme but a full exhibitor list that will cater to all ITSM needs. We're also excited about the new networking opportunities we have, along with a couple of surprises up our sleeves."

'Super intuitive technical sessions with top innovators!'

SITS offers the only free ITSM education programme in Europe, comprising seminars, panel discussions, breakfast briefings, and hot topic workshops. Over two days, attendees can benefit from a range of sessions offering practical advice and industry insights.

Renowned speakers from the UK and beyond will cover topics on everything from ESM, AI and ITIL to mental health and diversity.

Zoe Thompson from Phoenix Life and Wellbeing Coaching will be hosting the session 'Thriving together: Building a resilient team for success.' The seminar will explore how to cultivate resilience in your team and how to provide the tools they need to thrive in any challenge.

"Shift Left" is a classic industry buzz word, but it can be hard to implement. Phil Payne from Bidvest Noonan will be hosting the seminar 'Making 'Shift Left" a reality,' where he will share tips and tricks as well as an example of

where the implementation of a new operating model meant shifting left was a necessity and not just an aspiration.

Karen Brusch and Claire Drake, Chair and Vice Chair of itSMF UK, will be leading the session 'Charting your course towards an IT service management career path'. This presentation will provide participants with invaluable insights into the various career opportunities available in ITSM and equip them with the knowledge and resources needed to navigate their career paths successfully.

Another huge theme that has been dominating the headlines this year is AI. Gustav Elveros from Ebbot will be presenting 'Generative AI in ITSM: Exploring benefits and mitigating risks.' The seminar will explore the highs and lows of integrating generative AI, providing insights into what to expect, how to ensure a secure implementation and, most importantly, how to avoid the risk of automating the wrong tasks.

"I've been coming to this show for decades. When I first came I used to sit at the back and write copious notes. And then I became a bit more confident and started talking to a lot more people, and then I presented last year!" commented BSI Committee Member Sandra Whittleston during the 2023 show.

'A dedicated show alongside SITS for MSPs is the perfect addition to an already successful show'

Co-located with SITS is the recently announced MSP Show. The new trade exhibition is dedicated to the rapidly growing Managed Service Provider sector. It caters for those who want to enhance their business by engaging with appropriate partners in this area. Exhibitors confirmed include HaloPSA, ThreatLocker, ConnectWise and Inbay Uptime Ltd. The MSP Show will also have a dedicated theatre, with two days of sessions specifically aimed at MSPs.

For further information and to apply for a free ticket to attend SITS - The Service Desk & IT Support Show and the MSP Show at ExCeL London on 17-18 April 2024, please visit www.servicedeskshow.com Use priority code SITS127 when booking your ticket.

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Three green avenues to sustainable ITSM

Whereas most organisations would list sustainability as a core value, ITSM doesn't play a predefined role in delivering value for a more sustainable business. This lack of definition can, indeed, be an advantage for IT. We can help define, deliver, and empower sustainable transformation within our businesses, argues Dr Tuuli Bell.

ITIL has always been about delivering 'value'. And what I really love about ITIL 4, the latest version of ITIL, is that is puts value at the heart of the framework, see figure 1.

When it comes to organisational or personal 'values' – i.e. the principles that guide our work – how do ITIL and ITSM respond to the 'value' versus 'values' debate? Whereas most organisations would list sustainability as a core value, ITSM doesn't play a predefined role in delivering value for a more sustainable business. This lack of definition can, indeed, be an advantage for IT. We can help define, deliver, and empower sustainable transformation within our businesses.

"How?" I hear you ask.
In my view, there are three different avenues you can take; I call them Green Avenues:

1. Focus on ESG (Environmental, Social and Governance) reporting – great for large corporations;

2. Focus on maximising positive outputs – great for software organisations that can scale and transform; and

3. Focus on minimising negative inputs – great for all shapes and sizes of organisation who want to make an impact.

The following sections cover the above points in detail; and a bit like everything in sustainability, the avenues are interconnected and support each other.
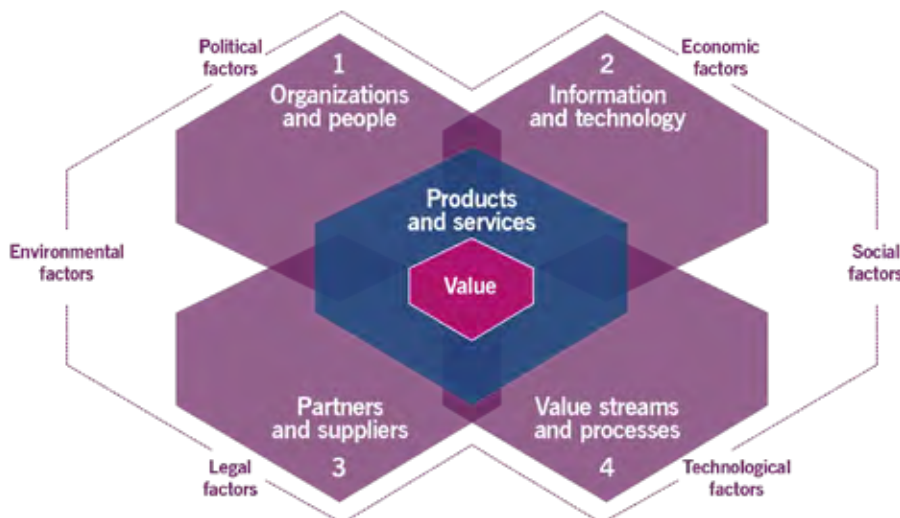

Figure 1: Value is at the heart of the ITIL4 framework.
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Green Avenue 1:
Creating change through governance and working with your ESG reporting team

ESG reporting applies to large organisations in particular. It calls on a number of standards and frameworks, and they include TCFD (Task Force on Climate-related Financial Disclosures) reporting practice, GRI (Global Reporting Initiative), SASB (Sustainability Accounting Standards Board) reporting practice, and SDGs (Sustainable Development Goals). A single organisation may report on one or more reporting practice.

As a service manager, you can help your ESG compliance team to gather data for their ESG governance reports; this data can be difficult to source, track and measure and is often saved in multiple Excel worksheets, post-it notes or other systems.

Green Avenue 2:
Expanding positive impact and engaging in customer-driven sustainability

Another avenue to realising green goals is to take a bottom-up approach, as opposed to the top-down governance-led model. This model works well for companies with digital, scalable offerings, such as software companies and IT service providers and resellers.

1. First, gather sustainability-minded customer-facing individuals from across your organisation.

2. Collectively, come up with a list of ways that you are already making an impact for your customers, considering the following:
   1. How do your customers utilise your services / products to make the world a better place?
   2. Do you have customers who work within the green sector and who use your offering to realise efficiencies? How do you help them create value?

3. Brainstorm ways that you could help your customers realise their sustainability targets through adapted offerings. Questions to ask include:
   1. Would new customers in the sustainability sector benefit from our platform/ offering? If so, what would we need to adapt to make it a reality? Who do we need to engage internally?
   2. How could our offering be adapted to drive the green revolution, to help companies transform into sustainability powerhouses?
   3. Could our products or services be adapted to help our customers become circular businesses, or become part of a circular business ecosystem?
   4. What is our role in such a circular economy?
   5. Who do we need to work with externally to make our new offerings a reality?

4. Be sure to collect the above findings into customer case studies, whitepapers and presentations. Feed the gathered information to the wider sales team. Ensure you have executive buy-in and commitment to invest in the new adapted offerings.

Green Avenue 3:
Limiting your negative impact and tracking your carbon emissions and those of your suppliers

You may have heard about carbon neutrality, net zero carbon, or Scope 1, 2, and 3 emissions. Limiting greenhouse gas emissions – of which carbon dioxide (CO_2) is one – is a major aspect of sustainability. If we can reduce, and finally get rid of, net greenhouse gas emissions, then we can limit global warming. Keeping our planet the right temperature is crucial to say the least. Governments are already preparing for up to 1.2 billion (yes, you heard that right) climate refugees across the world in the next couple of decades. You don't need to be a social scientist or a statistician to figure out that pretty much everyone will be affected.

So, what can we do in service management to limit carbon emissions?

In short, carbon emissions are categorised into three scopes:

- Scope 1 emissions are all the emissions that you or your organisation produces
- Scope 2 emissions are the Scope 1 emissions of your electricity supplier, and
- Scope 3 emissions are the Scope 1 emissions of your other suppliers, and of your customers.

Ideally, all organisations would know their Scope 1 emissions. Then, Scope 2 and Scope 3 emissions would be a matter of adding them up.

For IT, one of the main issues concerns in-house data centres, and the electricity and cooling required to run them. How are the data centres powered? Are we using green, renewable energy? Could we change to renewable energy? Many organisations use hybrid cloud storage; how are these facilities powered by our supplier?

Another area where IT plays a key role is electric waste, as well as digital waste. For electric waste, can we prevent or delay waste by extending the use of our assets? For digital waste, we can ask if we really need all that storage, or we could put rules in place to automatically delete old data. Addressing these areas creates economic efficiencies too.

Conclusions

Sustainability is an exciting opportunity, and a big responsibility, for IT. It drives ITSM to think in new ways of delivering value to their organisations. Collaborating across the business around the topic of sustainability enables your internal and external customers transform and become sustainable entities. As an ITSM leader, you can make a conscious choice to lead a sustainable transformation. You can follow one or more of the Green Avenues: 1. ESG reporting, 2. maximising positive outputs, and 3. minimising negative inputs.

Figure 2. Three Green Avenues to Sustainable ITSM.
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Tuuli Bell

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Business transformation at Bletchley

Rooms full of old mainframes and early computers, reel to reel tape drives, the Bombe and of course the Enigma machine make up just a few of the amazing attractions at the National Museum of Computing at Bletchley Park, where Alan Turing and his team cracked the enemy code which helped win the Second World War.

As a member of itSMF UK I was able to book (for free) on the recent Business Simulation event at the venue. I have to admit I was as excited to attend the event as I was to explore the world famous and once secret headquarters, which was home to many of Britain's greatest minds and – in some respects – the birthplace of the modern computer.

It's the 20th March 2024, the sun is shining, and I walk through the gates of Bletchley (which is near to Milton Keynes) feeling very nostalgic and proud of our nation's heritage. There is a visitor centre to the right and the security guard instructs me to follow the road to the last building - Block H. As I walk up the path, I look to my right and see all the old blocks, typical Civil Service 'huts' reminiscent of the 1960s and 70s. Looking through the windows I wondered what great breakthroughs and eureka moments happened within their walls, and I felt a little sad that the buildings were slowly rotting, dilapidated, and the whole of what I think was G block area cordoned off to the public. Yet, the entire site was still captivating and beautiful. To the left are all the new college buildings and the park is now dedicated to all things cryptographic. I walked to the top of the hill and was greeted by the itSMF UK banner and the wonderful team who were hosting the event. I received my pass and entered the building. In a room to my left I can see the Bombe (or a replica of it), the machine Alan Turing and his team invented to crack the Enigma code, and down the corridor to the right a room full of 60's and 70's IT memorabilia.

Dilapidated Block G

I grabbed a coffee and started networking; there was around eight of us from DWP Digital and the other delegates were from other member organisations, everyone seemingly interested in their surroundings and the history that came with it. Oh yes, I nearly forgot: I went on a workshop as well. :)

The Business Simulation

Now I can't give too much away about this, because it would spoil it for you if you decide to join a future event (we certainly hope to do more), but what I can do is share the outline

which itSMF gave us and tell you about the significance this event had to DWP Digital. Because, like many organisations, DWP Digital is always looking at ways to refine its operating model.

Jaro Tomik - Presenter Extraordinaire

I have never been on a business simulation event before, so this was a total unknown. We entered the room, which (for 40 people) was, shall we say, cosy. Tables were already arranged and, wherever you sat, you weren't far from the front so there was no escaping or hiding in the background. There were three screens and a presenter. Enter Jaro Tomik [yAr-oh toh-meek]!

Jaro asked everyone in the room to do a quick intro and explain why they were there before explaining the rules. Basically (as per the brief) we were about to deliver a two-year digital transformation in one day. We were going to represent different teams and record and discuss results. That is about as much as I'm going to give away – no spoilers!

What I will say though is that I saw so many similarities to the teams and processes in the simulation to our own Digital organisation. I saw similar challenges, and in the course of the day I saw the room untangle and make the entire end-to-end process work efficiently. We did this in three rounds and, at the end of each round, we analysed our findings and then made changes.

One of the best parts was the discussion between rounds where everyone shared their thoughts, and I learned a lot about business areas I know very little of. My one

recommendation for the event is to join a team with which you are not familiar, to gain an appreciation of the challenges other teams face and how you might be able to help them.

I feel like I've given too much away already, however I have only spoken about what is already in the brief. So if you do go on one of these events, I'm pretty sure I haven't spoiled it, and wherever you work in Digital this will be relevant. There is a similar free event, open to all members, in July and that one is at Alton Towers (which is also steeped in British heritage going back to the 1860s), and I wholly encourage you to register quickly as there won't be many places left.

Following the event, we were all privileged to be able to join a tour around the Museum where our guide took us through the history of computing, showing us all how the computers we know and love today - from our laptops to our phones - were developed and created. The guides were amazingly knowledgeable and clearly love what they do.

It was great to get a feel for the reality of the development of the Bombe (the machine which cracked the Enigma code) and to gain such an insight into the steps taken to create a solution that changed the course of world history. The perfect place to deliver a business transformation in a day.

Simon Rolley

Simon Rolley is Capacity Lead – Service Management Practice at DWP Digital Group.

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