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## Outgrown your Help Desk? Then it's time for ITSM!

Practical guidance for transitioning from a Help Desk to more robust IT Service Management (ITSM) processes and technology

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## ***Introduction***

In Third Sky's observations, many IT support organizations have functioned for a long time with a set of dysfunctional characteristics, including (but not limited to):

- A reactive, "hair on fire", approach to support.
- Reliance on the "heroic" acts of those specific individuals that have deep knowledge of the systems they are supporting.
- An inability to make sense of (i.e. report on and interpret) the volume of tickets that they work.
- Use of a Help Desk ticketing tool that is good for logging tickets, but not for actually working them or distinguishing real "issues" from requests.

This white paper will describe how adoption of the ITIL® framework of good practices for IT Service Management, coupled with a transition to a more robust IT Service Management application, can greatly improve not only an IT organization's support function, but also help IT to act as an integrated organization rather than a collection of disparate silos.

## ***Ten signs that it is time to move from a Help Desk to ITSM model***

The following quotations are "ripped from the headlines" of conversations with Third Sky customers who are recognizing the dysfunctions in their current, Help Desk-oriented support function.

1. **Level 1 support staff:** "Whoever is yelling the loudest to management will get our attention."
2. **Level 2 support staff:** "I spend too much time responding to the same issues or providing status updates on existing tickets."
3. **Level 2 support staff:** "We are getting hammered by management for taking too long to close some of these tickets... but a request for a new laptop shouldn't be on the same clock as a system failure. We have lead times to deal with!"
4. **Help Desk Manager:** "No matter how hard we try, we can't get anyone outside of our Help Desk staff to use the ticketing tool."
5. **Help Desk Manager:** "Every ticket results in a swirl of emails – all of our work is really handled in email right now."
6. **Application Developer:** "I spend too much time supporting things that we've already developed and released, and not enough time on my projects."
7. **Applications Manager:** "Bob (the developer) stayed up all night to help resolve that system failure." **Help Desk Manager:** "Only after the system was restored did we find out that Bob was the one whose breaking change had caused the failure in the first place!"
8. **Applications Manager:** "We have no way of knowing how often our changes are causing incidents... but we suspect it's a lot!"
9. **CIO:** "I have no idea what everyone is working on – they say they are swamped with requests, but none of our high priority projects are getting done"
10. **Typical User:** "We call them the Help-less Desk"

If one or more of these quotes resonate within your own organization, then it is worth considering adopting a set of good practices - and the associated technology to support those good practices – to remediate the dysfunction.

The next section will describe one of the most popular frameworks of good practices for managing IT services - ITIL® - and how its adoption can help improve the support function.

## Overview of ITIL® & ITSM, and how can it help your support activities?

### ITIL® and IT Service Management (ITSM)

ITIL® stands for *Information Technology Infrastructure Library*. ITIL® is not a prescriptive methodology; rather, ITIL® provides organizations with a useful framework of good practices and guidelines that define an integrated, process-based approach for managing services.

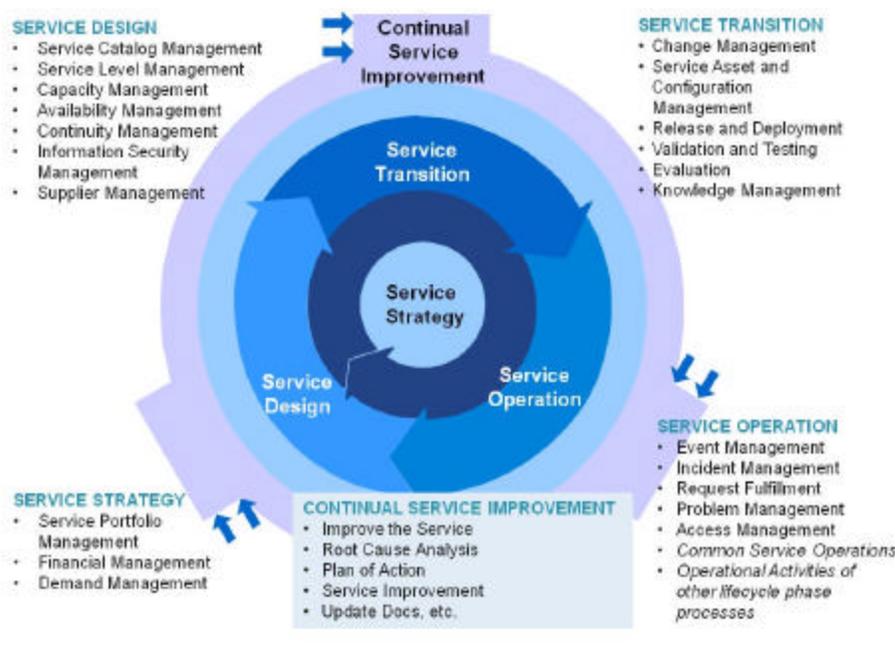
Per ITIL®, *Service Management* is a set of specialized organizational capabilities for providing value to customers in the form of services. Thus, by extension, *IT Service Management* (ITSM) focuses on leveraging your service management capabilities to provide technology-based services to your customers - whether they are internal customers, i.e. other departments within your own company, or external customers.

ITIL® is based on good practices that were observed around the world and compiled in the late 1980's by the British Government's IT organization – formerly the Central Computer and Telecommunications Agency (CCTA), now the Office of Government Commerce (OGC). The library has evolved and improved over time and was refreshed as *Version 3* ("v3") in the late spring of 2007.

In its current v3 form, the library is composed of five inter-related books, each describing a phase in the lifecycle of services delivered by any service provider:

- Service Strategy
- Service Design
- Service Transition
- Service Operation
- Continual Service Improvement

The following graphic depicts the phases of the Service Lifecycle, together with their associated processes, as described in the ITIL® framework:



## How can ITIL® and ITSM help your support activities?

Adoption of ITIL® good practices encourages organizations to transform themselves:

- From being IT (i.e. inwardly) focused to being Customer / Business (i.e. externally) focused
- From being a provider of “gadgets” to being a provider of services
- From being an expense the business (and even IT) doesn’t understand to being a more transparently run unit that functions like a business within the Business.

Throughout the service lifecycle, good IT Service Management (ITSM) encourages a more holistic focus on the services IT provides, rather than a siloed focus on the functions and processes of Infrastructure & Operations vs. Applications, or Support vs. Development.

The following sections highlight how adopting an ITSM mindset can result in better quality of support.

### Service Strategy

Service Strategy enables your organization to:

- Set objectives and expectations of performance towards serving customers and market spaces.
- Identify, select, and prioritize the opportunities for serving your “market”.

Service Strategy is about ensuring that your organization can handle the costs and risks associated with its Service Portfolio, and is set up not just for operational effectiveness but also for distinctive performance.

By ensuring that there is an upfront understanding of the business priorities of its customers, IT can ensure that the right things ultimately end up being supported, with the right level of resourcing.

### Service Design

Service Design enables your organization to:

- Design the services that you deliver, together with the governing practices, processes, and policies, to realize the strategy that you have laid out.
- Facilitate how you will introduce those Services into the live environment - ensuring quality service delivery, customer satisfaction, and cost-effective service provision.

Service Design is about converting your strategic objectives into portfolios of services and service assets that will deliver value to the Customers and capture value for your stakeholders.

Good Service Design results in business requirements being translated into solutions that have been designed for the “real world”, including how they can be most effectively supported at the appropriate levels of service.

### Service Transition

Service Transition enables your organization to:

- Set customer expectations regarding how a new or changed service can enable a business change
- Ensure that releases (of service changes) can be integrated seamlessly into existing business processes and services



- Reduce variations between the predicted and actual performance of the transitioned services
- Reduce known errors and minimize the risks
- Ensure that the service can be used in accordance with the requirements and constraints.
- Capture knowledge about the new or changed services and/or their components.

Service Transition is about implementing your service designs so that Service Operation can manage the services and infrastructure in a controlled manner, according to plan.

Good Service Transition ensures that changes are transitioned carefully into operation, with the appropriate capture and publishing of knowledge, not “thrown over the wall” to the support organization.

### **Service Operation**

Service Operation enables your organization to:

- Manage their services and infrastructure in a controlled manner, according to plan
- Manage the technology, processes, and people that deliver and support the services
- Manage conflicting priorities to ensure that agreed service levels are met and balance is maintained

Service Operation is about coordinating and carrying out the day-to-day activities and processes required to deliver and manage your services at the agreed levels to business users and customers.

Good Service Operation takes a more proactive and planful approach to keeping the lights on and ensuring that the production environment becomes more, rather than less, stable over time.

### **Continual Service Improvement**

Continual Service Improvement enables your organization to:

- Review, analyze, and make recommendations on improvement opportunities in each lifecycle phase and analyze Service Level Achievement results.
- Identify and implement individual activities to improve service quality and improve the efficiency and effectiveness of your enabling processes.
- Improve the cost effectiveness of delivering services without sacrificing customer satisfaction.

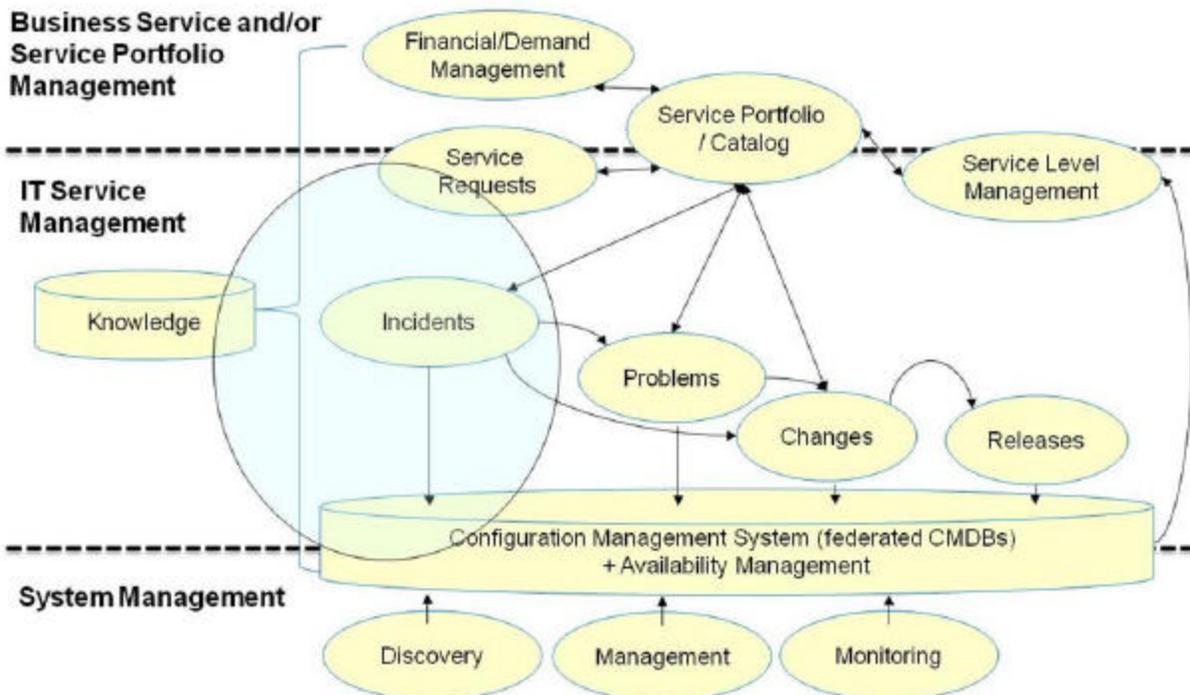
Continual Service Improvement is about continually aligning and re-aligning your services to the changing business needs, by identifying and implementing improvements to the services that support the business processes.

Good Continual Service Improvement means that cost-justified initiatives are pursued across all of IT - not just the operations group - that result in improvements to the quality of support.

## Distinguishing between Help Desk and ITSM solutions

### “Process Footprint” of a Help Desk solution

From an ITIL® perspective the typical process “footprint” of a Help Desk ticketing solution is limited to the shaded oval in the graphic below:



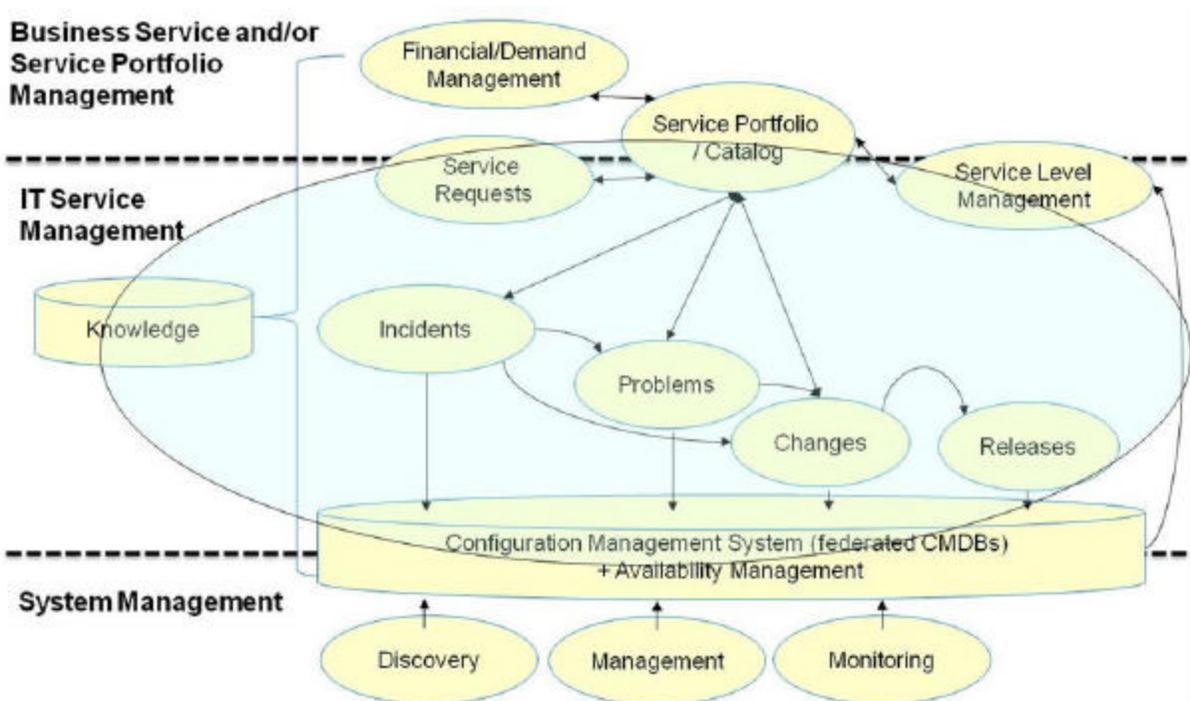
Focusing mainly on providing the ability to log and manage break/fix incidents, these types of solutions are characterized by their enablement of rapid issue logging, but are often very one-dimensional in the sense that “a ticket is a ticket is a ticket” in the solution’s data model and user interface.

When Service Requests are logged – representing the business asking for access to existing service or asking a question, rather than a report of a failure - they may have their own type or category in the solution. However, all too often they are subject to the same service level commitments, escalation rules, etc. as true incidents, not to mention skewing the resulting incident statistics and adding to the size of the queues of open tickets to be managed.

These solutions typically provide a rudimentary knowledge base (featuring an ability to search FAQs or published solutions) and often provide the ability to link incidents to assets such as desktops, laptops, and servers.

## “Process Footprint” of an ITSM solution

By contrast, the typical process “footprint” of an ITSM solution is much broader, spanning a great many ITIL® processes and enabling the tracking of each process object (such as Incidents, Requests, Problems, Changes, and Releases) as distinct types of records that can be inter-related per the ITIL® guidance :



In addition, in an ITSM solution:

- The knowledgebase is tightly integrated with the Problem Management process that helps to produce the knowledge .
- Assets are not merely tracked, but their configurations are understood – including the inter-relationships between the Configuration Items that are under management, thus helping with impact analysis for both incidents and changes.

## **Benefits of a fully integrated ITSM Solution**

When an organization adopts the ITSM framework of processes, benefits accrue to the support function from across the whole service lifecycle. For example, adopting ITSM can help you:

- Place your support activities in the larger context:
  - What services are we supporting?
  - How do the service level objectives vary from service to service and/or from customer to customer?
  - Understand what Configuration Items (applications, servers, networking devices, etc.) are supported, what Services they enable, and how they inter-relate.
- Introduce a Single Point of Contact (SPoC) Service Desk, instead of legacy "Help Desk(s)" / points of entry.
- Distinguish Service Requests from Service Incidents.
- Distinguish Service Requests from Change Requests
- Distinguish Problem Management from Incident Management.
- Understand the relationships between any Changes and resulting Incidents.

Modern ITSM solutions can support the ITSM process framework and help you realize the benefits above in ways that a traditional Help Desk ticketing solution cannot. A recent research study conducted by Glomark-Governan supports these findings and emphasizes the importance of coupling ITSM process improvements with a solution that can support those improvements:

Dimension	Operational Improvements from ITIL adoption*
Reduce overall IT support costs	16% to 32%
Reduce the number of failed changes from improved testing	15% to 27%
Reduce the number of recurring incidents	7% to 13%
Decrease in user downtime as a result of better incident management	10% to 28%
Reduction in the average incident resolution time	28% to 48%
Faster recovery after disaster	40% to 74%

\* "...some of the factors that affect the range of results include:

- Companies that used external ITIL® expert consultants achieved a higher level of results.
- Companies that implemented all [of the examined] ITIL® processes, as compared to companies that implemented ITIL® in selected processes, achieved a higher level of results.
- Companies that invested in IT management tools to assess process changes and enable IT services achieved a higher level of results, compared to those companies that performed process changes with little or no investment in IT tools."

Source: Glomark-Governan, 2008



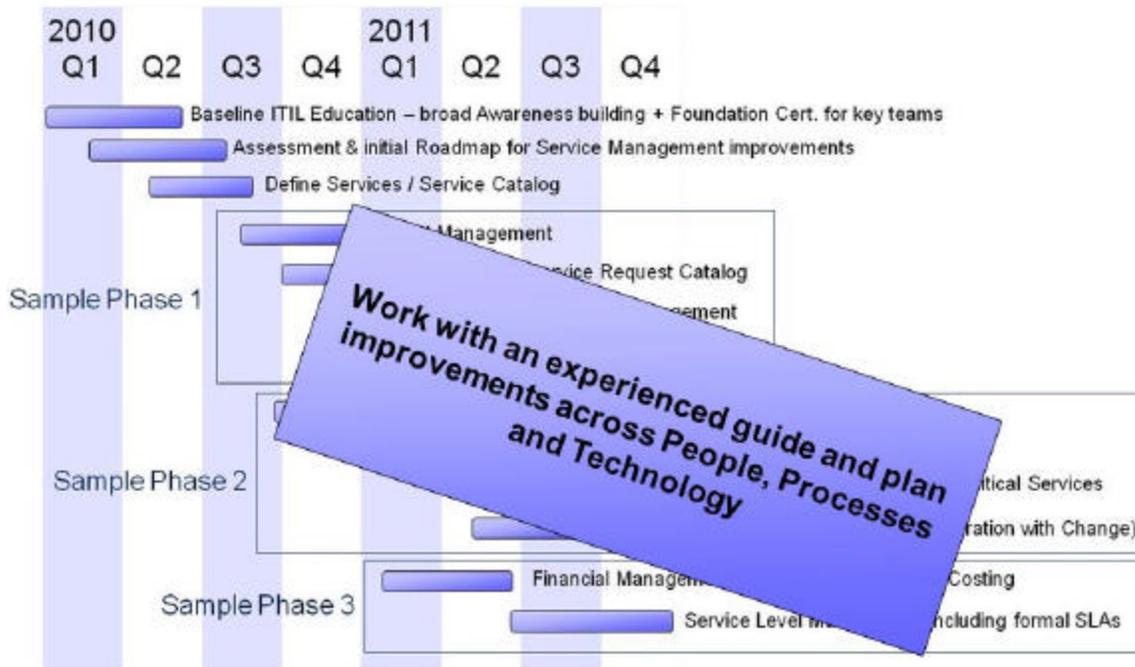
The following chart shows just some of the ways in which a n ITSM solution can help deliver the key benefits described above:

Benefits of ITSM framework adoption	How an ITSM solution helps deliver those benefits
<ul style="list-style-type: none"> <li>• Place your support activities in the larger context:               <ul style="list-style-type: none"> <li>○ What services are we supporting?</li> <li>○ How do the service level objectives vary from service to service and/or from customer to customer?</li> <li>○ Understand what Configuration Items (applications, servers, networking devices, etc.) are supported, what Services they enable, and how they inter-relate.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Manage Services and their Service Level Objectives (and relate those to Customers via SLAs).</li> <li>• Visualize the inter-relationships between Services &amp; Configuration Items.</li> <li>• Manage not just Assets and their physical attributes, but all key elements that make a Service possible and their business context.</li> </ul>
<ul style="list-style-type: none"> <li>• Introduce a Single Point of Contact (SPoC) Service Desk, instead of legacy “Help Desk(s)” / points of entry.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide the Service Desk with the ability to manage <u>all</u> contact with Users, including via Self Service.</li> <li>• Reduce interruptions to Level 2 and 3 support, engineering, and development teams, allowing them to be more productive when they focus on strategic projects.</li> </ul>
<ul style="list-style-type: none"> <li>• Distinguish Service Requests from Service Incidents.</li> </ul>	<ul style="list-style-type: none"> <li>• Manage requests to timelines and workflows that differ drastically from those of incidents</li> <li>• Understand the volume of activity that relates to “delivering more of that great service we provide” vs. “restoring service and recovering from service disruptions”</li> </ul>
<ul style="list-style-type: none"> <li>• Distinguish Service Requests from Change Requests</li> </ul>	<ul style="list-style-type: none"> <li>• Distinguish between the requests relate to / draw down from an existing Service and those that ask for a Change to that existing Service.</li> <li>• Establish a clear channel for making standard requests of IT, with separate workflow(s) from Requests for Change.</li> </ul>
<ul style="list-style-type: none"> <li>• Distinguish Problem Management from Incident Management.</li> </ul>	<ul style="list-style-type: none"> <li>• Put the right focus on keeping the business up and running – stop putting the users “on hold” while searching for the root cause of the issue.</li> <li>• Separately analyze the root cause of one or more incidents and build reusable knowledge re: known errors, workarounds, and solutions.</li> </ul>
<ul style="list-style-type: none"> <li>• Understand the relationships between any Changes and resulting Incidents.</li> </ul>	<ul style="list-style-type: none"> <li>• Speed up Incident diagnosis by providing visibility into the Changes that have been released (what those Changes “touched”)</li> <li>• Launch Requests for Change from Incidents or Problems to track the fixes to issues.</li> </ul>

## Guidance for transitioning from a Help Desk model to ITSM

Clearly, the adoption of the ITSM framework involves improvements to existing processes, the introduction of new managed processes, the technology solution that supports those processes, and changes to organizational roles.

This may seem to be a daunting challenge, but, as with so many transformation efforts, the job becomes more manageable when broken up into logical chunks. Furthermore, work with an experienced, objective guide who can help you define a roadmap for tackling the adoption of ITSM in phased initiatives that will deliver benefits early and frequently.



No organization should try to adopt all parts of the ITIL® framework at once – focus now on the improvements to your IT Service Management capability that will deliver the biggest benefits to your organization. Realizing early benefits will help you keep the momentum going and ensure that your progress through your roadmap will be as efficient and effective as possible.

As part of this roadmap, be sure to select an ITSM solution that can support your roadmap’s needs. Again, the involvement of an experienced and objective consulting partner can help you compare “apples to apples” and make a selection that will best fit the current and future needs of your organization.

### Summary

IT organizations need not continue to suffer the dysfunctions that come from a siloed support organization and processes, coupled with a legacy Help Desk ticketing solution that no longer supports their needs. By adopting the ITIL® framework of good practices for IT Service Management, and selecting an ITSM solution that facilitates that framework, IT organizations can transform their support function and improve the quality and cost-effectiveness of the service they provide.

## Appendix 1: About Third Sky

Third Sky specializes in the assessment, planning, and adoption of ITIL® / ITSM solutions that enable IT organizations to deliver higher levels of service at while maintaining or reducing Total Cost of Operations (TCO). Third Sky provides a comprehensive set of IT Service Management solutions addressing people, process, and technology initiatives for medium to large enterprises.

## Third Sky Services

The ITSM Adoption Model, as defined by Third Sky, revolves around continuous education through all phases of the ITSM Lifecycle. Third Sky has a full complement of services targeting all aspects of an organization's ITSM development. These services encompass best-in-class education, process, and technology services aimed at providing the critical solutions to an organization's People, Process, and Technology requirements. The chart below summarizes Third Sky's full complement of ITSM services:



	Education	Process Consulting	Technology Solutions
<b>Strategy</b>	ITIL® Executive Awareness ITIL® Awareness ITIL® Foundation (with & without Simulation) ITIL® Intermediate: <ul style="list-style-type: none"> <li>o Lifecycle</li> <li>o Capability, &amp;</li> <li>o Managing Across the Lifecycle</li> </ul> CobiT® Foundation Education	ITSM Vision & Strategy  ITIL® / ITSM Maturity Assessments & Gap Analysis  IT Governance Assessments  ITSM "Horizons" Roadmapping	Product Requirements Definition & Selection Service
<b>Design</b>	Capability-Specific Workshop Courses: <ul style="list-style-type: none"> <li>o Service Catalog Workshop</li> <li>o CMS/CMDB Development</li> </ul>	ITSM Process Design & Transition  Capability-Specific Services, such as: <ul style="list-style-type: none"> <li>o Service Portfolio/Service Catalog Development</li> <li>o CMS/CMDB Development</li> </ul>	Integrated IT Service Management (ITSM)  Software Sales & Implementation Services  Targeted Technology Implementation Services
<b>Transition &amp; Operation</b>	Customized Process Education  Technology Training		
<b>Continual Improvement</b>	ITIL® v2 – v3 Bridges  ISO/IEC 20000 Education	ITSM Continual Improvement  ITSM Mentoring / Expert-On-Call	ITSM Software Health Check Services  Product Expert-on-Call Support Service



## Why Third Sky?

Third Sky provides a comprehensive set of IT Service Management solutions addressing people, process, and technology initiatives for multiple enterprises. Some of the reasons organizations choose Third Sky include, but are not limited to:

- ◇ **Experience:** Our ITSM professionals have extensive, proven industry knowledge and experience.
- ◇ **Commitment to Our Clients:** We view our client relationships as long-term partnerships with their success as our primary focus. Third Sky's mission relies upon our client's satisfaction with the goal of earning a client's reference.
- ◇ **Delivery & Success:** We work efficiently and effectively, rapidly delivering real business results to our clients in the most timely and cost-effective manner. Our clients enjoy having the choice of service level options that best meet their timeline and budget.
- ◇ **Industry Involvement & Thought Leadership:** Third Sky is actively involved in the development and maintenance of the Service Management body of knowledge and the associated qualifications. We look to the future to help our clients respond to the evolving demands of their businesses. Third Sky offers a consistent complimentary webinar program focusing on topics resonating throughout the ITSM Industry and post recorded for download on Third Sky's website.

## Third Sky Market Differentiators

Third Sky's is a minority owned business with a reputation for delivering World Class ITSM services to our clients. Our reputation is a reflection of our relentless commitment to providing the highest level of service possible to our clients. Our ITSM Educators, Process Experts, and ITSM Application Experts are known throughout the industry for their knowledge and contributions to the ITSM domain.

Third Sky is unique in that it provides a comprehensive approach to IT Service Management. By providing premier ITSM Education, Process Consulting, and Technology Consulting services, Third Sky addresses the essential services required for a successful ITSM adoption. This resulting alignment with ITIL®'s People, Process, and Technology focus dramatically improves the quality of each specialized service provided. How does this benefit our clients? First, our clients realize higher certification pass rates and knowledge retention with respect to ITIL® Education; Second, our clients appreciate a greater ROI (return on investment) and VFM (value for money) with process improvement initiatives; and Third, our clients witness an increased utilization of existing ITSM applications and/or better alignment to an organization's business requirements when evaluating prospective ITSM applications.