



# Expanding Service Management Across the Organization



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## INTRODUCTION

[Recent research](#) conducted by HDI and Samanage found that an increasing percentage of organizations either have or are planning to expand service management beyond IT. Expanding the principles, practices, and tools of service management across an organization takes time and effort (and therefore money). Why should organizations invest in this expansion? Our research tells us that main drivers include:

- Improving the customer experience
- Tool capabilities
- Resolving a business need or challenge
- Improving employee satisfaction and/or engagement

This trend report is intended to provide guidance to organizations that are already improving or are seeking to improve productivity, employee satisfaction, and efficiency by expanding service management principles, practices, and tools across business units. It highlights some of the positive benefits and directs attention to one often-overlooked enabler:

1. Employee satisfaction and productivity
2. Customer experience and data accessibility
3. Engaging non-IT business units
4. Organizational change management

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## ENTERPRISE SERVICE MANAGEMENT BOOSTS EMPLOYEE SATISFACTION AND PRODUCTIVITY

One of the most eye-opening findings of our recent research was the uplift in both employee satisfaction and productivity experienced by the organizations that have expanded the principles, practices, and tools of service management beyond IT. Our findings show that the effects on both have been substantial.

According to the most recent [HDI Practices & Salary Report](#) data on ticket management and metrics, some of the most frequently cited factors that contribute to increased employee satisfaction include:

- Organizational culture
- Type of work
- Amount of work
- Customers

Expanding service management to other parts of the organization can have a positive effect on organizational culture, tending to unify the way things get done and cut across silos. IT staff benefit from the opportunity to support different types of work, understand their colleagues better, and consolidate tools across the organization.

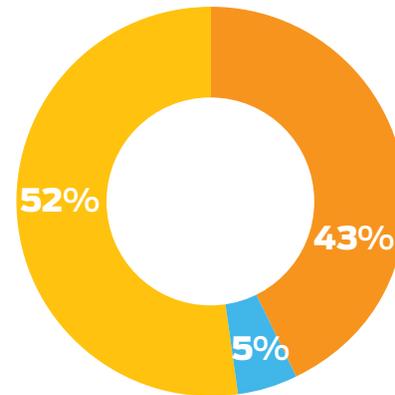
Eighty-five percent of respondents to our recent ESM survey measure employee satisfaction (ESAT). More than half do so annually (54%), while barely any do so daily or weekly (5% and 3%, respectively). In organizations that do measure ESAT, the expansion of service management has had the following effects:

- More than half have seen an increase in ESAT
- Two-fifths have seen employee satisfaction remain constant
- Only 5% of organizations report a decrease in ESAT

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### How has Employee Satisfaction Changed Since Expanding Service Management Outside IT?

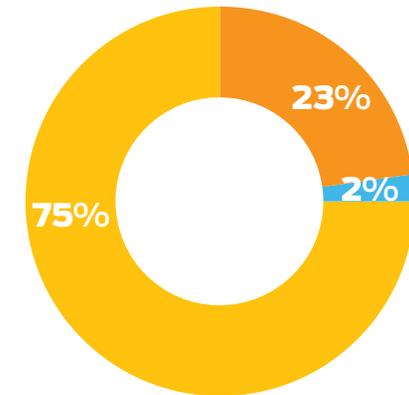


● Increased ● Stayed the same ● Decreased

*Percentage of organizations*

It should be noted that ESAT includes all employees and is different from the customer satisfaction (CSAT) scores given by those who contact the service desk, even if those users/customers are all employees. ESAT measures employees' (including IT staff) overall satisfaction in the workplace.

### How has Productivity Changed Since Expanding Service Management Outside IT?



● Increased ● Stayed the same ● Decreased

*Percentage of organizations*

In those organizations that track productivity:

- Three-quarters report that it has increased since the expansion of service management
- Productivity decreased in only 2% of organizations and remained the same in 23%

If the odds of increasing ESAT, productivity, or both are this good, why would you not expand service management across the entire organization?

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## TOOLS AND TECH: THE BENEFITS OF A SINGLE PLATFORM

Adopting a service management tool across business units can help your organization:

- Consolidate multiple systems to create one system of record with many capabilities
- Store, access, and analyze data from a single source rather than many sources (such as one database for IT user accounts, another for HR records, another for facilities, and so on)
- Provide the ability to automate processes across business units by eliminating incompatibilities between disparate tools
- Provide rapid access to data and information as authorized, as needed, where needed
- Provide a unified interface or portal for various needs, unifying the user experience

Our recent survey revealed that 77% of organizations have undertaken the expansion of service management to improve the customer experience. Having a single platform to offer up service request catalogs, ticket submissions (work orders), and request or incident status and history goes a long way toward elevating the customer experience. People know exactly where to go to request service or get an issue resolved, regardless of whether it's HR, Finance, Facilities, or IT.

“ All areas seem to have their own ticketing systems...or none at all. Facilities and HR have their own; Finance and Marketing have none. [Customers would] benefit from one portal where someone could get help from any of us. ”  
– 2018 survey respondents



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Any tool—not just a service management tool—should be *fit for purpose*. Hence, the required functions of the service management tool must be understood before it is applied to multiple business units.

- What, exactly, is the tool expected and needed to do in each of the areas where it will be used? What does HR need? What does Facilities need?
- What changes in appearance and/or terminology need to be made for the tool to be useful in each area?
- What can be automated?

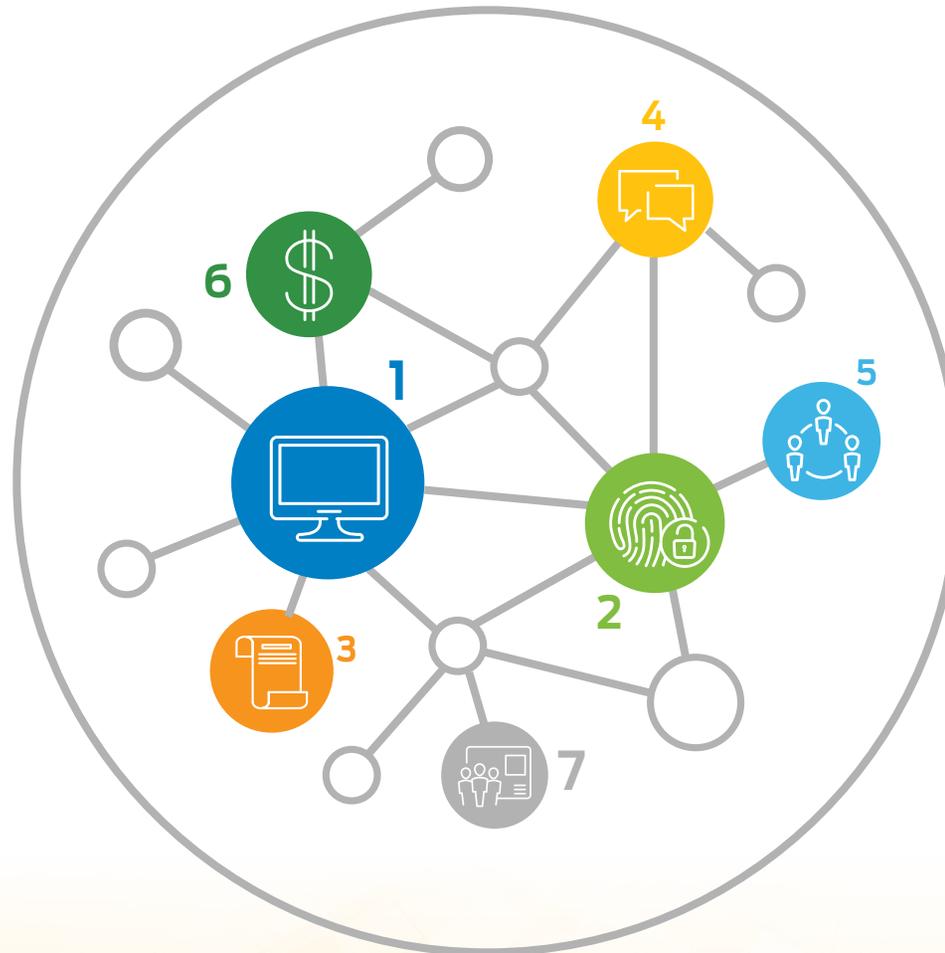
Process automation has become a major focus for many organizations. “Time is money” has never been more true, and automation can save a great deal of time by avoiding manual inputs, transfers between teams and systems, and so on.

As one example of how automation can help, let’s look at the termination process, which generally involves multiple business units. It’s critical to ensure that all employee access to internal resources is either terminated or controlled according to established business rules. As several security breaches have demonstrated, former employees whose access has not been properly discontinued can cause havoc. According to [CIO Insight](#), about 25% of organizations can’t say for certain how long it takes to deprovision terminated employees, and 20% of the organizations that responded to that survey have experienced security breaches by former employees. Correctly and precisely automating this one process has the potential to reduce the organization’s risk and prevent security breaches.

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There are countless ways the service experience can be automated and elevated. Here are just seven:



- 1 IT**  
Employee Account Access
- 2 Facilities**  
New Security Access ID Card
- 3 Legal**  
Contract Review and Approva
- 4 Marketing**  
Social Media Support
- 5 HR**  
Employee Promotion
- 6 Finance**  
W-9 Request
- 7 Shared Services**  
Order Business Cards

To learn more about these and 143 other processes you could consider automating, check out [Samanage's "150 Ways to Automate Service Management Throughout Your Organization"](#)

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## ADOPT AND ADAPT: CASTING A WIDE NET FOR ESM

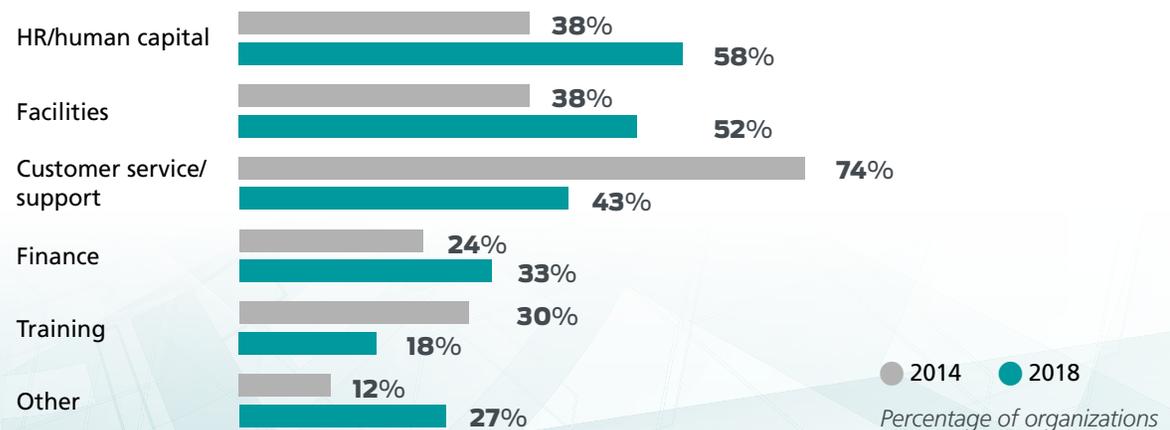
Before any non-IT units of an organization are going to jump onboard, they will likely want to know why they should. About half of our respondents say that IT leaders are championing the expansion in their organizations, but regardless of who champions the effort, it falls to these teams or individuals to articulate and communicate the benefits and potential risks of the initiative. As with any change of this scope, a communication plan is vital. Stakeholders throughout the organization will want to know:

- What’s happening
- Why it’s happening
- When it’s happening
- What the expected results are

To effectively communicate these points and any others your organization deems necessary, it’s worth engaging the services of your marketing department to flesh out the plan, including any branding you may wish to apply to the initiative. The benefits should be made clear: improved customer and user experience through the use of a unified interface to achieve multiple goals, increase productivity, and improve employee satisfaction.

It’s important to remember that a project like this won’t have an end date; it’s a change in the way people work (think “lifestyle change,” not “diet”). There will, of course, be timed projects to support the shift—primarily in the expansion of the tool to non-IT units—but the continuing success of enterprise service management depends on adopting and adapting to new ways of working.

**Areas Adopting Service Management**



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HR and facilities are leading the pack in the adoption of enterprise service management; adoption by finance has also grown substantially (a 9% increase from 2014 to 2018). It's certainly worth noting that adoption by customer service/support, seemingly very closely related to IT/technical support, has declined steeply since 2014 (from 74% to 55%). We can only speculate as to why this is the case, but there are a couple of viable explanations: on the one hand, it's entirely plausible that customer service/support teams who were interested in ESM early on have since decided not to move in that direction; on the other hand, it's equally likely that in the four intervening years, customer service/support teams have adopted ESM to such a degree that the population of customer service/support teams in the ESM-adoption queue itself has declined.

HR, facilities, customer service/support, finance, and training are far from the only departments that could benefit from ESM. Legal, marketing, transportation, health and safety, sales, creative services, engineering, and supply chain were some of the departments called out by survey respondents, indicating that service management is, indeed, permeating the enterprise.

The key takeaway is that service management can help the organization achieve its goals, regardless of a particular business unit's function. The principle of "adopt and adapt" applies: adopt the idea and relevant elements of the framework, then adapt the particulars to the specifics of the business unit's goals as well as the organization's overall goals.

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## ORGANIZATIONAL CHANGE: BEGINNING, END, AND EVERYWHERE IN BETWEEN

Too often, organizations oversimplify and understrategize the move to enterprise service management, yielding less-than-desirable results and potentially a failed effort. There are [five things](#) any organization contemplating ESM should consider before getting started:

1. **Make sure it's not about you.** ESM isn't about how smart IT is, and it's definitely not about IT telling other units of the business how to do their jobs. It's about enabling other parts of your business to do things in better ways, with better data and better tools than they currently have.
2. **Get your house in order.** You'll be hard-pressed to convince other business units to adopt ESM if they have a low opinion of IT in general, and especially of the ability of IT to deliver what the organization needs when the organization needs it.
3. **Learn other languages.** Other business units have vocabularies of their own, and many of the terms used in IT mean something very different. Asking any business unit to "just forget" what they call something and use IT terminology instead is like asking IT to start referring to computers as ice cream cones.
4. **Make sure your tool can do ESM.** Your tool needs to be flexible and easily customizable so that the terms displayed to the customers and users in each business area make sense to them (see #3).
5. **Assess your need for cultural change.** Does your organization have an embedded feudal culture, with fiefdoms (silos of independent power) everywhere? Before you start your ESM initiative, you'll want to have an effective plan in place to address those power pockets.

“ When our organization made the decision to implement a new ITSM tool, we did not realize the lesson behind the implementation would be more about affecting organizational change than deploying an ITSM tool. ”

– Eddie Vidal, CIO Review

“ Getting staff trained on the new tool(s) may be a project. But the work of service management—and especially its continual improvement—is an ongoing endeavor without an end date. Once you arrive at this realization, you should begin thinking about organizational change. ”

– Roy Atkinson, *Organizational Change Management: An Essential Part of the Service Management Journey*

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This last point is the most important. Over the past several years, there has been increased focus on the need for managing organizational change as part of every service management initiative. In order for business processes to change, the people performing them have to change their behaviors. Organizational change is *essential*.

This reality is far from universally recognized, however. In our recent research, we asked whether a formal organizational change management (OCM) program was included as part of the expansion of service management, and we found that just one-quarter of the respondent organizations had done so.

While the gains in productivity and employee satisfaction are impressive, including OCM as part of the ongoing effort will help you ensure that those gains are sustainable. Combining a [service management roadmap](#) with OCM can help identify potential problem areas and help employees successfully navigate the changes in their work life. As one employee put it during a change initiative, “Yesterday I knew how to do my job; today I don’t.”

An OCM program can:

- Help minimize and address resistance to change
- Help employees understand why “this way is better”

- Help align behaviors with new and/or different goals
- Help identify where new resources and skills are needed
- Ensure that changed processes “stick” and employees don’t revert to “the old way”

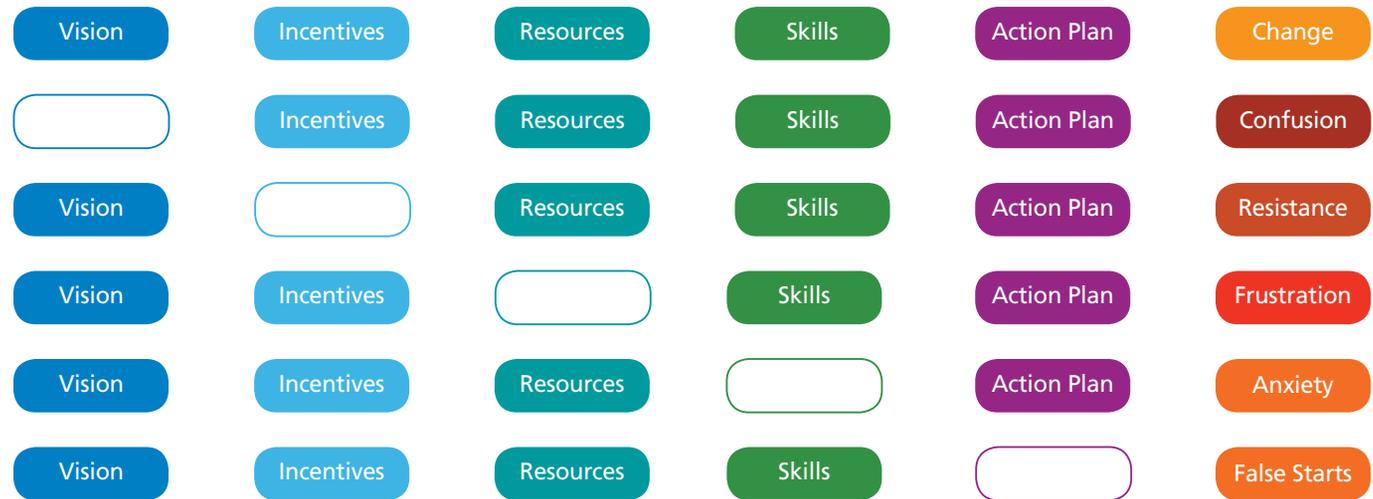
The [VIRSA model](#) is a simple approach to organizational change—and the consequences of not including each element. Each of the key elements must be present or you won’t achieve the desired outcomes.

- **Vision** says what we’re going to do, avoiding confusion
- **Incentives** give us a personal reason to do it (such as simplified work), reducing resistance to change
- **Resources** give us the tools, time, and people we need to get it done, eliminating frustration
- **Skills** are necessary for actually getting it done, reducing the anxiety of not knowing how to do it
- **Action plans** tell us when to do what, eliminating starting on the wrong foot and having to start over

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### Overview of the VIRSA Model



*Overlooking any one element of the model can lead to undesirable outcomes.*

OCM should not be an afterthought or a “bolt-on” after the service management initiative begins; it should be part of the planning and execution from the inception. Use the worksheet on the following page to capture your current state according to the VIRSA model and help make the case for a comprehensive organizational change management initiative.

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### VISION

What is the vision for the initiative?

### INCENTIVES

What is the motivation? How will you engage people with the initiative?

### RESOURCES

What resources (people, process, technology) are available to support the initiative?

### SKILLS

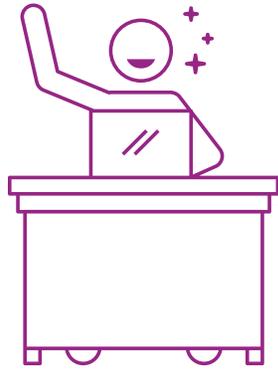
What skills will you need to refine or acquire to execute the initiative?

### ACTION PLAN

Have you developed an action plan with clear deliverables, targets, and deadlines? If not, what's holding you back?

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## CONCLUSION

For the vast majority of organizations, the primary driver for expanding service management beyond IT is to improve the customer experience. Whether it's HR, facilities, finance, or even marketing or legal, every department is a service provider that supports the internal customers, or employees, within your organization. By expanding the years of best practices that have been mastered by IT departments to every other department, you are equipping every service provider with the tools required to in turn provide employees with the resources and support they need to do their jobs more effectively and efficiently.

Quite simply, the key to a successful enterprise or [employee service management](#) strategy is to treat your employees as your best customers. When employees are empowered with the support and resources they need, available through a unified platform experience, they are more satisfied.

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For over 30 years, HDI has partnered with thousands of organizations to improve their customer service and service management performance by educating their people, elevating their processes, and empowering their strategy. From C-level professionals to directors, managers, and frontline staff, HDI is the definitive source of industry information, leadership, and performance planning. Through events, certification and training, consulting, membership, and industry resources, HDI aims to transform service and support organizations and reimagine their approach to delivering exceptional service and value. Learn more at [ThinkHDI.com](https://www.thinkhdi.com).

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