

## From ITSM to INSTITUTION SM – A Centralized Approach to Service Management Extending Beyond the walls of IT



A discussion with Florida Atlantic University on its application of Service Management across campus, providing benefit to departments beyond IT



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### BEFORE TEAMDYNAMIX

#### Info-Tech: What led you to start thinking about replacing your existing ITSM solution?

**Ann:** We had used a couple of different tools in my time at FAU, but the solution we had in place up until a few years ago was falling short in a number of areas. The user experience was cumbersome for the users submitting requests and the knowledge base we were presenting out to them was really just a cluttered compilation of articles without any good means of organizing and categorizing for ease of consumption.

The experience for the IT team wasn't much better. Configuration was limited, and highly manual. We had very little visibility into the frequency of different ticket types, so identifying patterns was virtually impossible. Reporting, too, was very difficult, to the point where we had to use a separate Business Intelligence tool to create the reports we needed. Ultimately, we realized that we needed new technology capable of supporting us in our desire to evolve beyond limited Incident Management practices.

#### Info-Tech: Once you had made the decision to switch, how did you narrow the list of potential replacements?

**Ann:** We invited several vendors come in for demos, but TeamDynamix was not on that original list. Unfortunately, or should I say, fortunately, our budget was not approved for that year so we had to push off the selection process. TeamDynamix actually entered the picture through our need for a PPM tool. I was brought in because they also had full ITSM functionality, sat in on the demos, and from that point it was pretty much a done deal. We had TeamDynamix do another demo for the technical staff as well, and once they were bought in we moved forward and finalized the selection.

*"I was brought in because of the full ITSM functionality, sat in on the demos, and from that point it was pretty much a done deal!"*



## Info-Tech: What impressed you the most about the TeamDynamix offering?

**Ann:** We were really happy with what we saw in the demo, the flexibility, create things on the fly, quick templates would make things much easier for us. The Service Catalog would also offer a vastly improved experience to the customers. Seeing that a ticket could go all the way up from an incident to a project was quite impressive, and aligned with some of our goals of bringing more ITIL Foundations frameworks into our service offerings. Our CIO wanted us to wait with the PPM tool until we had filled an open PM position, but allowed us to move forward with the ITSM tool.

## HOW WE GOT THERE

### Info-Tech: Once the “done deal” was finalized, how did you get the deployment process started?

**Ann:** TeamDynamix was extremely responsive and we had a very quick turnaround on finalizing the contract. Within a few months we had our implementation engineer on the ground here. Initially our expectation was that he would take care of everything, but in hindsight, the greatest help we received was him stepping back and putting us in control. It was going to be our solution and our processes, and really forced us to think about how exactly we were going to maximize the benefits for us, not just following a standard deployment template. The engineer trained us on everything related to the ITSM tool and guided us along the way, giving us tips and tricks of how other schools setup their environments as well as industry best practices.

We are a bit unique in that we have a centralized environment but some of the other subsidiary colleges have their own IT groups. We had to customize some of the routing both within the system, but also look at our existing processes for intake and triage.

### Info-Tech: That certainly is an interesting approach to implementation—how specifically did you benefit from that guidance?

**Ann:** Well, one example is that we had never had a Service Catalog. Being forced to really review our processes helped us identify opportunities not just within our group, but across the other support teams as well. One of those areas was standardization of some of these services that we never would have uncovered without this approach. Stepping out of the daily rut of solving tickets gave us the boost we needed to redefine some of the types of services we provide, and create a robust Service Catalog from that point.

The support from our implementation engineer was very customized in this regard. He didn't simply put forward a framework or model that they typically use, but helped us build it off our current state. Having not only a technical specialist, but really a trusted advisor through the process kept us on track throughout the deployment.

*“TeamDynamix truly values client input. All of their updates are client-driven, and they are always actively soliciting feedback in order to incorporate it into their next release”*

## WHERE WE ARE NOW

### Info-Tech: How have the customers responded to the new solution and processes?

**Ann:** The biggest feedback we receive now is the inclusivity that the tool provides to the customers. Visibility comes up a lot as our users can now track their ticket, see when it is being worked on, making them feel like part of the process, rather than throwing requests “over the fence” and hoping they are addressed.

We have also removed a lot of the clicks from the process for the customers. Before there were a lot of dependencies where they had to select one thing, then another, as our forms were not as intuitive. Now, they can start with the Service Catalog, and using customized request forms, complete them much quicker. This also helps us dramatically when the helpdesk agent is creating a ticket from a phoned-in request, dropping that from a 10 to 15 minute exercise down to about 5 minutes.

### Info-Tech: Have any other teams outside of IT been able to leverage the functionality to their benefit?

**Ann:** Just last summer we have changed over our Finance and HR systems to a new vendor. We’ve incorporated that new system directly into the Service Catalog. The entire team associated with that new system are using TeamDynamix to take on requests and solve issues. We have also just recently added our division of Student Affairs where we have created a mini ticketing system within the larger install.

We have plans to further expand this functionality over the summer to enhance the service capabilities for their technologies. There is a lot of opportunity across the campus to take advantage of richer capabilities. We are getting more and more requests from people outside of IT, so much so that we’re contemplating giving them their own deployment to support the rampant demand. Soon TeamDynamix will most likely become the university ticketing system, not just IT’s ticketing system.

### Info-Tech: What advice would you give to other institutions who are currently considering TeamDynamix?

**Ann:** Well, for starters I would definitely recommend them! We have had a great experience so far from the solution, deployment, and support. On a specific note, I do recommend that everyone have a good understanding of what they want to get out of the software before starting down the path. Make sure that you have a good understanding of your environment, and where TeamDynamix will fit in to that before rushing into the deployment. Work with them to understand your current state, define your goals and objectives, and they will help you understand what customizations, both to the software as well as to your existing processes, will help set you up for success.

## KEY FACTS

60%

Reduction in time spent creating tickets from phone requests

*“Soon, TeamDynamix will most likely become the university ticketing system, not just IT’s ticketing system.”*