TREND REPORT:
Expanding Service Management IN HIGHER EDUCATION

HDI

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ABOUT THIS REPORT

This trend report is intended to provide guidance to higher education institutions seeking to expand and extend service management principles, processes, and tools to areas of the organization outside of IT. Based on HDI research and other cited sources, the report explores the why and the how of expanded service management in a higher education context.

In the broadest sense, consumerization is happening across the board. Customers and users have come to expect internal processes and functions to perform at the level and with the ease of the Google, Amazon, and Apple services they know from their experiences as consumers. Their customer experiences are all about speed and ease, and organizations of all types—including institutions of higher education—are moving to provide services at the same level.

> ***Each year hundreds, thousands, or even tens of thousands of students arrive on campus and they bring with them an average of five devices. These are exciting and yet also apprehensive days for these students and their families and onboarding should be as smooth as possible. By offering a single point of entry to request service, deliver knowledge and documents, you can help mitigate confusion and drain on your IT organization.***
>
> ***—TeamDynamix***

Expanding service management across the organization isn't just about "doing ITSM outside of IT," although that provides a simplified description those who are familiar with IT service management can grasp. It is really about finding better ways to manage the services offered by the various parts of the organization in ways that make sense for *them*. In this way, IT can demonstrate its value as a trusted partner to the organization as a whole, and be recognized for the role it is playing in sharing service management tools and expertise.

When services are offered in a uniform, simplified way, the overall customer experience is better. To deliver services in this way requires the right approach to processes and tools.

WHY EXPAND SERVICE MANAGEMENT OUTSIDE OF IT IN HIGHER EDUCATION?

Higher education has many of the same reasons for expanding service management as other types of organizations do.

> ***When organizations realized** that their service management system could allow their ITSM processes to be applied to other areas of the business, they were motivated to take advantage of that capability. — "Service Management: Not Just for IT Anymore" (2014)*

Obviously, there are reasons other than "We can." One of the primary advantages is having a central, single point of contact for reporting any problems or to make requests for service. Another is that using common sources of service management data allows better analysis, management, and delivery of services across the board.

> ***"We made a conscious decision** to spread the knowledge out as a way of eliminating duplicate or redundant practices." — Survey respondent, "Service Management: Not Just for IT Anymore" (2014)*

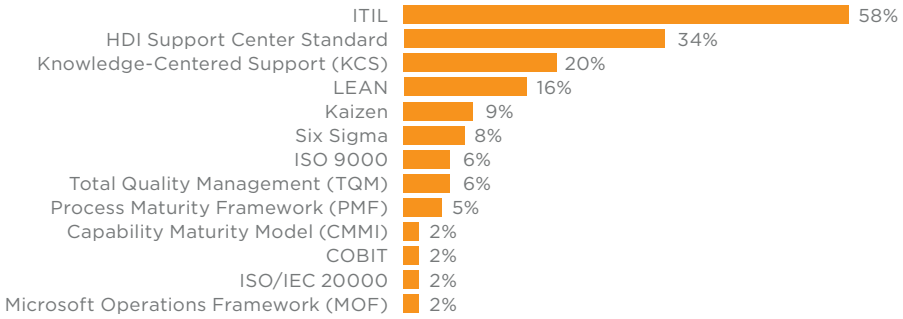
The major stakeholder communities in higher education are students, staff, and faculty. Each of these stands to benefit from better service management across the institution:

- Students are the customers of higher education and their customer experience matters greatly
- Faculty can better deliver courses and materials, and can better communicate with students when services are running properly and when new services can be requested easily
- Staff can better respond to requests for all the services they offer when those services are well managed and tracked

FRAMEWORKS AND METHODOLOGIES BEING USED

For the 64 higher education support centers represented in the **2016 HDI Technical Support Practices & Salary Report**, ITIL is still the predominant framework underpinning service management, although it can be used in combination with other frameworks and methodologies, as explained in **Synergies Between ITIL and Knowledge-Centered Support** and in **Better Together: ITIL and the HDI Support Centre Standard for a High-Performance Support Centre** (Figure 1).

FIGURE 1: FRAMEWORKS AND METHODOLOGIES CURRENTLY USED (N=64)

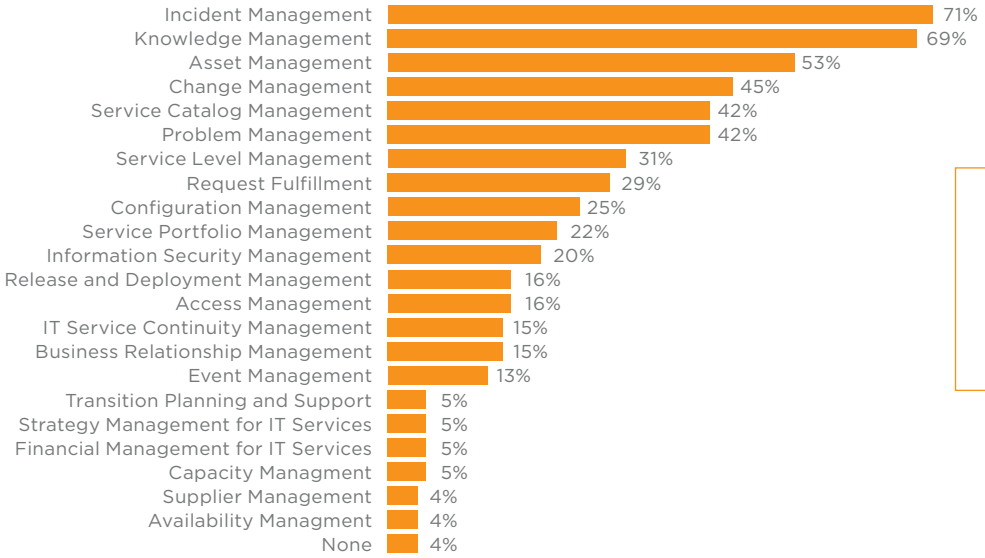


Percentage of organizations

An additional 23% of higher education institutions are planning to use KCS in the future.

Higher education organizations are also using the same service management processes as other organizations (Figure 2).

FIGURE 2: SERVICE MANAGEMENT PROCESSES CURRENTLY ADOPTED (N=55)



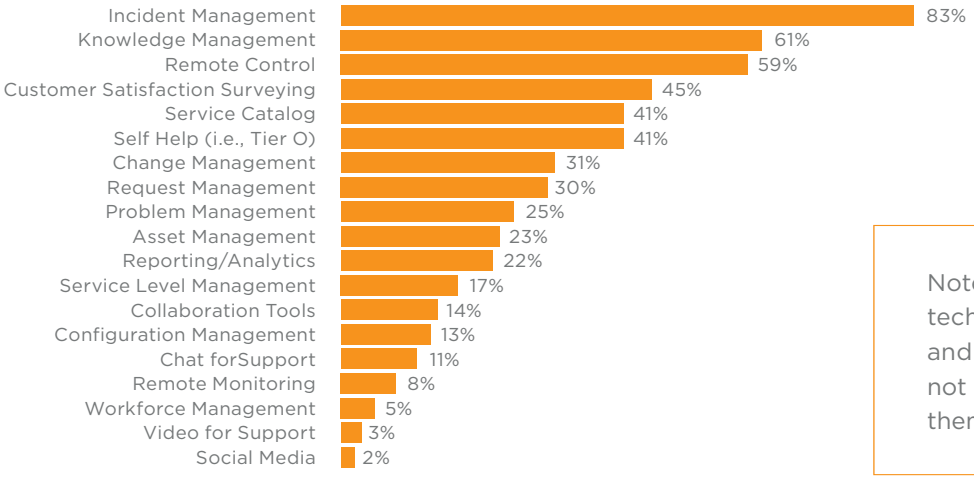
Percentage of organizations

52% of higher education institutions were using customer relationship management in 2014.

WHICH SUPPORT TECHNOLOGIES ARE MUST-HAVES?

The higher education support centers represented in the **2016 HDI Technical Support Practices & Salary Report** named these technologies as must-haves (Figure 3):

FIGURE 3: MUST-HAVE TECHNOLOGIES FOR END-USER SUPPORT (N=64)



Percentage of organizations

Note that these are the technologies that support and enable the processes, not the processes themselves.

NON-IT AREAS USING SERVICE MANAGEMENT PRACTICES, PRINCIPLES AND PROCESSES

Just as an IT service desk or help desk handles incoming contacts from end users, resolves the issue or escalates to a group that can resolve it, Facilities management involves the same basic steps: someone reports trouble or makes a request, a ticket is created, work is done, and the ticket is marked resolved. Whether it is a broken exit door, an electronic card reader that is not functioning properly, the need to reserve audio-visual equipment, or a classroom that needs alterations, the same basic steps are followed.

If a database exists containing all the current configuration data for Facilities (just as the CMDB contains IT data), then a service management tool can be linked to that data so that there is no question about what is being asked for, or about the location of the Facilities asset involved.

Likewise, Admissions offices—and for that matter, any area of the organization—can take advantage of the same systems, as long as the data they need and use can be linked to the service management tool.

Areas in which service management principles, processes, and tools being applied in higher education include:

- Facilities
- Admissions
- Alumni offices
- Libraries
- Medical centers
- Research departments
- Project management
- Human resources
- Residential life
- Media services
- Asset management
- Event planning

What these higher education organizational areas have in common is the need to create and manage:

- Incidents and service requests (work orders)
- Service catalog and service request catalog
- Knowledge base
- Endpoint security
- Project management

In short, any area in which a case management approach is used may be a candidate for expanded service management, using a single system of record.

Having a capable service request catalog enables customers to create their own requests while being able to view choices and/or recommendations. As customers tend toward more self-service (as almost every survey shows they are), both self-service and self-help become more important.

Self-help (Tier 0) support can be very effective in both reducing the contact volume on the support center and in reducing costs overall. The cost per ticket was decreasing measurably between 2009 and 2011, and has continued to fall to *as low as $2 per individual incident or request*.

Compare these costs with the $16 median cost per ticket across all channels other than self-help in 2016.

In order to be adopted across the user community, knowledge must be "findable" in the customer's words. Self-help knowledge bases are not adopted when articles are written from the viewpoint of IT, or any other department's internal staff. In order to bring the language of the customer into the knowledge base, it is good to measure **LZS, or Level 0 Solvable.**

HDI has long experience with Knowledge-Centered Support/Knowledge-Centered Service (KCS). This **methodology** concentrates on the rapid capture and reuse of knowledge as the product of support and its continual improvement through the practice of UFFA: use it, flag it, fix it, add it. KCS is equally valid regardless of the department or area that is creating and reusing knowledge and providing it to customer service/support teams as well as customers.

Getting support teams to eliminate duplicate troubleshooting and problem solving by documenting and sharing solutions is a milestone on the journey to mature service management.

58% of higher education institutions **are using ITIL as their service management framework, and KCS aligns well with ITIL.**

HOW SERVICE MANAGEMENT HELPS ACROSS HIGHER EDUCATION'S SPECTRUM OF SERVICES

The vision for expanded service management is to provide a single point of contact—accessible from all devices—to report a problem or initiate a request, from a dorm room door that doesn't close properly to a staff payroll issue to a faculty question about audio-visual services, as well as a single system of record to enable management of services across the institution. Simplifying and streamlining service management creates a better experience for students, staff, and faculty. In addition, there can be gains in knowledge management with respect to services that share common tools, creating further efficiency within departments and campuses.

The capability to manage an entire project portfolio across organizational areas and units can make expanded service management even more useful. Tying the project portfolio together with existing service management capabilities allows service managers to:

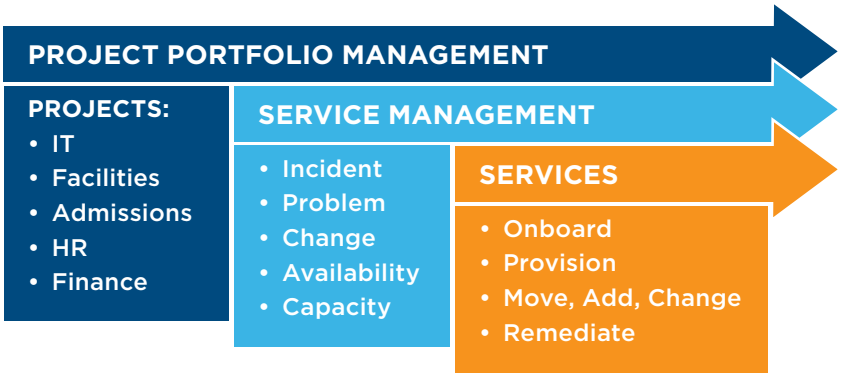
- Create, manage, and view data from a database of proposed, planned, and ongoing projects
- Prioritize projects and optimize the project portfolio
- Plan projects and manage the execution of approved projects
- Manage the supply and demand for project resources
- Manage the project lifecycle from proposal through project completion.
- Integrate service requests (work orders)
- Communicate with service managers across the campus in a common tool

HOW USING THE RIGHT TOOLS IS CENTRAL TO SERVICE MANAGEMENT

Having a single, integrated platform for service management provides far greater insight into all the services, providing capabilities for better reporting and management across the institution. The ability to manage *all* aspects of the service lifecycle in a single system of record and use data that is shared across the service lifecycle can optimize and streamline all service management work and deliver a unified and consistent customer experience to the students, staff, and faculty served.

If, however the toolset is not fit-for-purpose, significant work will need to be done either to customize and configure the tools, or to shoehorn the processes into tools that were not intended to handle them. Ideally, then, the toolset should have broad service management capabilities; the addition of project portfolio management maximizes the benefits.

FIGURE 4: PROJECT PORTFOLIO MANAGEMENT, SERVICE MANAGEMENT, AND SERVICES



Having an integrated project portfolio management and service management tool gives an organization a clear view into the current status and progression of projects as they affect the suite of service offerings across business units. Which services are in the critical path of projects? Which services are to be offered as components of the projects? Which business units need access and input into the services?

Managing all of these variables in the same tool increases visibility, velocity, and accuracy at the outset and during the course of projects affecting service management (Figure 4).

CAVEAT: YOU NEED TO GET IT RIGHT *BEFORE* YOU EXPAND

Expanded service management (known outside higher education as *enterprise service management)* is "not just about implementing ITSM processes and technology outside of IT," **says analyst Stephen Mann**. The key is knowing which processes are applicable and how best to implement them in the organization's context as well as in the context of the particular area or department in which service management is being applied. How is ITSM working within the IT department now? (Hint: If IT is having difficulties with service management, they probably should not be leading the charge into other areas.) Who will champion the service management expansion? Is IT working to solve a problem, or looking to increase its own importance by telling other areas of the institution ho they should do their jobs? What are the risks and the desired outcomes? Like any major institutional initiative, organizational change management must be built into the plan as well.

Any major initiative in service management comes back to the three areas that will inevitably be involved: people, processes, and tools. Over the past two decades, service management professionals—the people component—have shown what they can do. The processes are well documented and proven to work. Only now are we seeing tools with a broad enough range to take on expanded service management initiatives and deliver outstanding results.

HDI

In 1989, HDI became the first professional association created for the technical support industry. Since then, HDI has remained the source for professional development by offering resources to promote organization-wide success through exceptional customer service. We do this by:

- Facilitating collaboration and networking
- Hosting acclaimed conferences and events
- Producing renowned publications and research
- Certifying and training thousands of professionals each year

Our Mission: **Elevate the customer experience through the development of the technical support industry.**

TeamDynamix

Service and project portfolio management designed specifically for higher education. A single platform bringing together IT service management extending to Facilities, Resident Life, Admissions, HR, and more--with project portfolio management.

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- Process consulting
- Custom client portal design