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Say Goodbye to the IT Service Management Queue.

Tablets, smartphones, and increasing employee expectations for faster, more responsive IT support are creating new ground rules for IT service management. New Rule #1—move from queue-based service to schedule-based service.

Abstract

IT organizations need a better alternative to the IT service queue, which no longer fits the needs and expectations of the increasing number of employees using personal tablets, smartphones, and other devices to get work done, along with mobile and remote workers who are seldom in the same place at the same time.

What's needed to support the shift from queue- to schedule-based service is calendaring capability with access to underlying ITSM systems, as well as personal and team calendaring applications such as Microsoft Exchange, to automate employee-empowered scheduling decisions.

The Challenges of Anywhere, All-the-Time IT

Three seismic trends have quickly crept up on the insular IT service management world and now threaten to shake its very foundations:

1. The daily commute, the office cubicle, the conference room, and the company-issued PC or laptop are rapidly going the way of the rotary phone. Mobile employees working from home, coffee shops, airport lounges or any number of other places have rapidly replaced the desk-bound worker of the past, with some estimates putting the number of mobile workers at over 75 percent of the white-collar workforce by 2013.[1] It's an immense challenge for IT service management organizations to fix issues in such a vast, varied and unpredictable environment. Employees are seldom in the same place at the same time. And the standardized ITIL policy-based procedures many organizations use were developed for known and tested equipment types and operating environments, not the freewheeling environment that is emerging today.
2. Increasingly, employees want to use their own tablets and smartphones for work. The BYOD (Bring Your Own Device) phenomenon has been a nettlesome issue for many large enterprises since it introduces a host of data security and compliance issues. Recently, however, many businesses have started to embrace the trend since discovering that a growing body of research points to dramatic improvements in productivity among workers using tablets. A million tablets were shipped to business users in 2010. That number was forecast to grow to 44 million by the end of 2012.[2] Most of these will be owned and controlled by employees. In fact, it's likely that soon the technology provided by many employers will be inferior to the leading-edge technology owned by employees.[3]

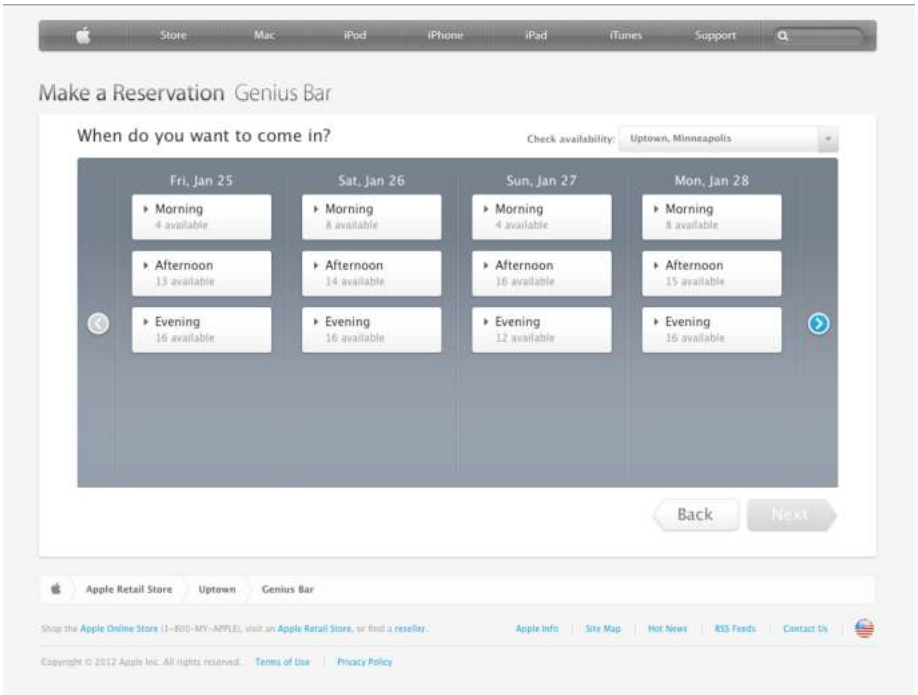
   Many IT service organizations are struggling to find their role in a mobile device world. They're not familiar with the countless apps employees have downloaded to their devices, and no one has yet come up with the technology to remotely diagnose and fix issues on tablets or smartphones. Furthermore, employees know a better alternative when they need help: Apple Store Genius Bars, Microsoft Store Answer Bars, Geek Squad counters at Best Buy, and other places that specialize in help with tablets and smartphones at little or no cost. If IT service management can't adapt to this consumerized world, but instead remains focused on an internalized world of IT policies and procedures, it risks losing relevance, and worse, its role in providing strategic value to the business.

3. Employees now have more options to seek help outside the confines of the enterprise, and the experience is nothing like what they've encountered with corporate IT. Genius Bars let consumers peruse an online calendar, book a convenient open day and time, then bring their device into an Apple store and have it diagnosed and fixed by an Apple "genius," often in less than 30 minutes. Contrast that with being number 139 in an IT service management queue and waiting days for an email response, a call back, or a visit from an IT technician. Employees and managers are under pressure to hold meetings, deliver reports, and in general get things done, usually through interacting with other employees. In this fast-paced environment, it's simply not convenient to have an IT technician show up in the middle of a presentation or meeting to fix an issue. Instead, managers need a mechanism to schedule either a service visit or an appointment, in something like a corporate Genius Bar, that fits into their own busy schedules. And many employees would rather turn to blogs, social media, crowdsourcing, or Google searches than to IT when it comes to tablet and smartphone issues. They know the information they need will be more up-to-date and the resolution faster if not immediate.

Where Does this Leave IT Service Management?

Due to these three trends, "The traditional help desk is dying or dead in some organizations," an analyst from the Gartner Group told ComputerWorld last fall. "The 'log it and flog it, detect and fix' model is dying."[4] While that may strike some as an extreme prediction (an enterprise can't be run on tablets and smartphones alone), it points to the direction in which many enterprises are now heading. "IT staff will have to make quick adjustments to meet the employees' demands to work with their own devices and be able to support different devices and stay with the finger on the pulse of technology," says Saar Bitner, the executive vice president of strategy and marketing at SysAid, a help desk software vendor.[5]

One adjustment many big enterprises have already made is setting up Genius Bar-like help counters in and around corporate headquarters locations where large numbers of employees are based. Intuit calls them Techknow Bars and promotes the concept extensively in employee recruitment. SAP calls them Mobile Solution Centers and promises "a friendly (not adversarial) place for workers to come and browse mobile devices and apps and get unhurried, unpatronizing technical advice."[6] Currently, the company has three such centers with plans to expand to 10 more locations. Other companies that have adopted the Genius Bar model include Intel and Hewlett Packard, where more than half of their employees are using mobile devices and working offsite.



Apple's Genius Bar scheduling system is changing the service experience of millions of consumers. They have complete control over when and where they schedule service and never waste a second in phone queues or online issue-logging systems. Apple Store in-store service reps benefit as well since the scheduling system automates appointments and automatically enters time blocks based on product type and the time needed historically to resolve similar issues.

The Genius Bar approach is an attempt to deal with the BYOD phenomenon, but what of the other two trends that are shaking up IT service management—home-based and mobile workers, and growing employee dissatisfaction with the traditional IT service delivery model?

The biggest stumbling block IT service organizations face in dealing with all three trends is the queue-based structure of most service desk systems. When employees log a service request, a ticket is usually opened in system such as BMC Remedy, ServiceNow, HP OpenView or another legacy IT service management suite. The ticket works its way to the top of the queue, and eventually the service requestor receives a response, either by phone or email. If the system is phone-based, the call is placed in a phone queue and the service requestor is continually reminded with words no one relishes hearing—"Please continue to hold and you will transferred to the first available member of the IT service desk team."

Many organizations with large volumes of service requests may see no alternative to the queue, but such a view is starting to crumble in the world of consumerized IT. In the past, the queuing worked because IT service organizations knew both the devices and applications employees used. Just as importantly, they knew where employees were located, and they knew they would be there tomorrow, the day after tomorrow, and the day after that.

Increasingly, none of these conditions exists. Android and iOS apps are largely terra incognita to IT service organizations. Remote and mobile workers rarely follow fixed schedules that put them in the same place at the same time. And as for the queue experience itself—it's becoming increasingly anathema to employees who are learning from the consumer world to expect customer-friendly service delivered on their own terms, when and where they want it, not service rooted in ITSM policies and procedures created for a relatively static enterprise environment that is rapidly disappearing.

Don't Queue It. Schedule It.

One of the most innovative aspects of Apple's Genius bar is its scheduling system. While walk-ins are welcome, most customers go to the Apple Genius Bar reservation page, select a specific store and product type and then view a calendar for the coming week with open time slots available in 10–15-minute increments. (Apple, of course, knows the common issues and problems encountered with its products and knows, down to the minute, how long it generally will take to resolve them.) There are no queues, no phone waits, no back-and-forth email exchanges. It's perhaps the ultimate in customer-driven service since service is completely scheduled on the customers' terms, when and where they want it.

The Genius Bar approach may not completely portend the future of the IT service desk, but schedule-based activity versus queue-based activity certainly does. Scheduling versus queuing is perhaps the only realistic way to deal with home-based employees who need a way to precisely schedule service calls, the BYOD phenomenon in general in which thousands of employees at different locations in a single metro area need walk-in tablet and smartphone support, and the expanding options employees have for getting support beyond the confines of corporate help desk systems.

There are dozens of calendar-based IT scheduling and change management products on the market that link to some underlying ITSM system and allow IT organizations to avoid change management conflicts, schedule resources, prioritize requests, and alert affected areas to planned outages or maintenance. What's needed is a calendaring tool that can access data from ITSM applications, enterprise systems, and personal calendars to align people, resources, and venues, then present scheduling options to

service management call takers or directly to employees for certain types of self-scheduling. The tool should include or be able to access workflow capabilities to schedule people, space and any other required resources for problem resolution.

Under such a scenario, service request scheduling can be done by a trained call taker or by employees using simplified versions of the same scheduling system. In the former case, the trained call taker is needed since the service request is typically an “unknown“ event that involves more complex server, network, and application issues and the intervention of the call taker to gather additional information to classify the event, determine the appropriate technical and location-based resources, and apply rules-based procedures to dealing with the request. Self-scheduling by employees can be made available for a more limited universe of simpler “known“ events, such as help with typical laptop, tablet and mobile device issues, as well as requests for short, “on-the-fly” training sessions and other types of support.

In both cases, organizations need tools that work with their underlying service management platform to:

- Automatically track the availability of resources, at both the individual and group level, for any given time period.
- Apply and track basic business rules concerning resource utilization, such as whether service requests are dispatched in a round-robin fashion; or whether internal or contract labor is used.
- Enable call takers to see all this information in a calendar view that provides a variety of broad and drill-down perspectives into scheduled activities.
- Enable self-service requestors see a much simplified calendar view that is as intuitive and easy to use as booking a visit using Apple’s online concierge service.
- Create automated workflows that update resource availability as scheduling activity occurs.
- Automatically notify by email both service deliverers and service requestors that a scheduling event has happened or has been changed, send email reminders as the event nears, and give requestors the ability to reschedule through the same email.

The Kinetic Data Approach

Two tools that meet these needs are Kinetic Request 5.1 and Kinetic Calendar 2.0. Kinetic Request is a powerful and extremely flexible request management portal application that comes bundled with Kinetic Task 2.0, an advanced workflow automation engine that enables users to configure a limitless number of workflows and approval processes based on events triggered in virtually any application database. Kinetic Calendar provides the ability to visually display any time-based information captured or generated within BMC Remedy systems and other ITSM applications; synch it with personal data in Microsoft Exchange, Lotus Notes, and Microsoft SharePoint calendars; and see the results in multiple drill-down calendar views. Many calendars can easily be created for different groups within the enterprise, including IT, HR, facilities, product support, legal and others.

When it comes to enabling schedule-based IT service management, Kinetic Request allows service request portals, including self-service portals, to be easily created and linked to underlying ITSM systems. Kinetic Task makes it easy to automate service request workflows, including request routing and approvals, and publish appointments to the personal calendars of IT personnel, with specific times assigned to the job. Kinetic Calendar allows IT resource availability to be viewed and tracked, enabling IT service management personnel to make conflict-free scheduling decisions. Calendars can also be created to allow employees to make Genius Bar-type scheduling decisions on their own.

These Kinetic Data tools may not completely kill off the queue, but they offer an efficient and cost-effective alternative for businesses grappling with a changing ITSM landscape. For enterprises that want to adopt the Genius Bar concept and allow employees to schedule their own times and locations for laptop, tablet and smartphone support; enable home-based employees to schedule service calls; and avoid frustrating employee with long waits in queues, Kinetic Calendar and Kinetic Request meet the challenge.

The Genius Bar has been called the "future of the corporate help desk," but that won't become reality until ITSM organizations have similar scheduling capabilities. Kinetic Calendar 2.0 makes the challenge simple with multiple easy-to-use calendaring options that work with underlying ITSM systems to automate employee-empowered scheduling decisions.

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About Kinetic Data

Kinetic Data has helped hundreds of Fortune 500 and government customers—including General Mills, Avon, Intel, 3M, and the U.S. Department of Transportation—implement BSM and service delivery management (SDM) applications aligned with ITIL best practices. Kinetic Data was named “Innovator of the Year” by an independent group of BMC Remedy users and the company also has been recognized with awards for its superior customer service and support. Kinetic Data serves customers from its headquarters in St. Paul, Minn., offices in Sydney, Australia, and through a network of reseller partners.

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