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Using Kinetic Survey and BMC® Remedy® Action Request System® for Enterprise Feedback Management

Introduction

The BMC® Remedy® Action Request System® (ARS) provides a unified platform for automating and managing Business Service Management (BSM) processes. The system makes extensive use of the Information Technology Infrastructure Library (ITIL®) framework of best practice approaches to IT service management and delivery. The BMC Remedy ARS platform was designed to help large enterprises meet three key business needs:

• Replacing outdated manual systems with process automation that speeds the handling of unique processes
• Rapidly prototyping, deploying, maintaining, and iterating Service Management applications: and
• Capturing and tracking critical business data.

Hundreds of applications are built on the BMC Remedy ARS platform. These include dozens of applications from BMC itself, custom-written applications by users, and applications from a number of third-party software vendors, some of whom specialize exclusively in BMC Remedy ARS development. What all BMC Remedy ARS applications share is:

• an architecture rooted in the BMC Remedy ARS development environment (an environment BMC calls "request-centric, forms-driven and workflow-based");
• integration with BMC Remedy ARS processes and the BMC Remedy ARS database; and
• use of BMC Remedy ARS feature sets, commands and user interfaces.

BMC Remedy ARS is used in more than 10,000 organizations, including 80 percent of the Fortune 500.

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BMC places the BMC Remedy ARS within the larger context of IT Business Service Management, a framework for "managing IT from the perspective of the business." The company's term is roughly analogous to what market intelligence provider IDC calls "services-centric" Business Process Automation.[1]

BMC Business Service Management Framework

Business Service Management
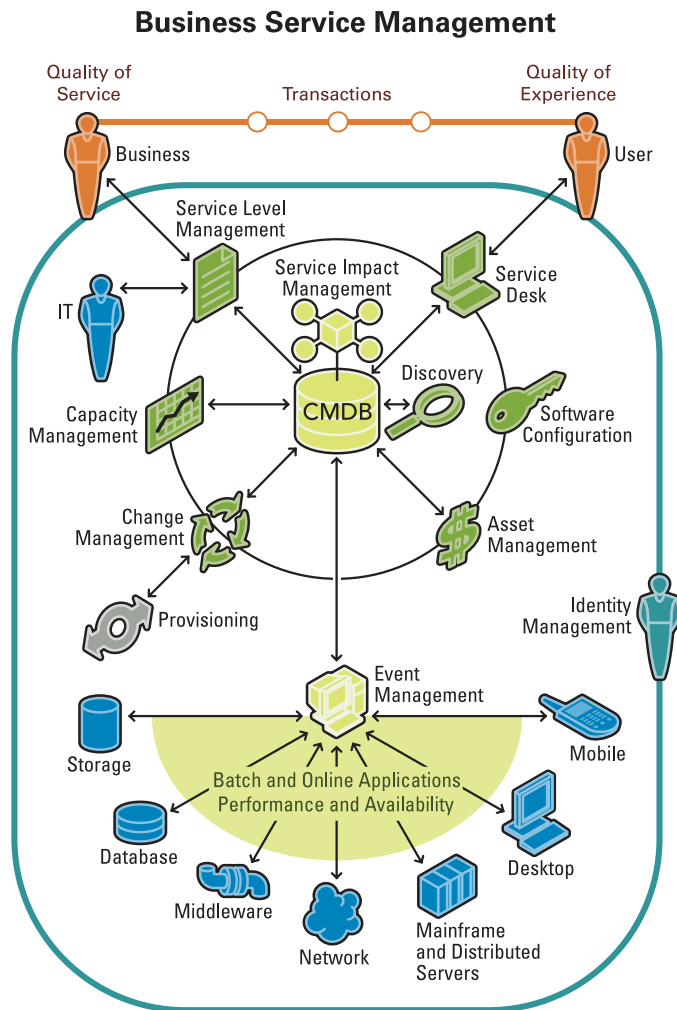
BMC Remedy ARS is the foundation for BMC's Atrium™ Configuration Management Database (CMDB), shown in the center of the diagram, and the BMC IT Service Management (ITSM) Suite (represented by functions surrounding the CMDB database), as well as many partner and customer-built service management functions.

[1]Dennis Byron, IDC White Paper. "BMC's Remedy AR System; A Services-Role Approach to BPA, June 2005

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BMC Remedy ARS and Enterprise Feedback Management

For as long as organizations have been gathering customer feedback, the most common method has been use of a "single-use, hastily processed, quickly forgotten survey."[2] Over the past two years, many businesses have been attempting to move away from traditional, stand-alone survey implementations toward consolidated, enterprisewide feedback systems to add strategic value to both overall business planning and internal efforts to improve processes and reduce costs—including the significant cost to large businesses of gathering external and internal customer feedback itself.

Organizations have sought a single tool that does two things. First, it must meet the different needs of all parts of the enterprise that have traditionally managed their own feedback processes; and second, it must standardize survey methodologies and branding requirements across the enterprise. Such tools also need to consolidate data from different parts of the enterprise and integrate results with current data and analytical tools.

These tools have a new name–Enterprise Feedback Management (EFM)–coined by one of the handful of vendors currently in this market space and quickly adopted by other vendors and analyst groups such as Gartner and IDC. Wikipedia defines EFM software as:

"Software (that) supports advanced survey design with CRM integration and advanced reporting with statistical analysis, centralized panel management, and a workflow process that provides a means for organizations to ensure consistent survey quality and enforce respondent privacy and IT security policies. Its corporate uses vary widely from HR, IT, marketing, sales and continues to expand on its corporate implementation and scope. Departments within an organization can collaborate on feedback initiatives, sharing results and gaining insights that enable the organization to listen, learn, react to and anticipate the needs of their key stakeholders."

Gartner Group describes the EFM marketplace in these terms:

"Some vendors are beginning to appear in more than one traditional survey category, and a few vendors are seeing the promise of catering to all of these categories with a single tool, giving technology support to the field of Enterprise Feedback Management (EFM). By unifying survey activities, organizations can realize the cost efficiencies associated with leveraging one vendor across multiple departments and ensure that the task of conducting surveys (preparation and distribution of questions, collection and analysis of data) remains the same across the different functions."[3]

The Wikipedia definition of EFM suggests that most EFM vendors are designing their products to integrate with CRM applications. (Others are offering solutions that stand

[2] Esteban Kolsky, Gartner Group. "Make the Transition from Surveys to Enterprise Feedback Management," 2005

[3] Gartner, ibid.

alone and require customized integrations to enterprise applications). BMC Remedy ARS users have a distinctly superior alternative to such approaches in the BMC Remedy platform itself, which is designed to gather service and business process metrics (the core of any truly enterprisewide EFM database) and use these metrics for processing and analysis in applications built on the BMC Remedy platform. All that's needed to transform the BMC Remedy ARS platform from primarily an IT tool into an enterprisewide EFM platform is a native application specifically designed to work with BMC Remedy ARS data, processes and workflows. This enables users to create and distribute formal surveys and other feedback mechanisms that are linked to BMC Remedy ARS transactions and events.

Kinetic Survey is currently the only native BMC Remedy ARS application that extends the BMC platform into EFM. Kinetic Data, one of the largest and most experienced software developers focused exclusively on developing BMC Remedy Business Service Management (BSM) applications, offers the largest portfolio of third-party "built on Remedy" packaged BSM applications. To Kinetic Data, Enterprise Feedback Management and the BMC Business Service Management Framework meet in the Quality of Service and Quality of Experience areas, and bring the human element into BSM.

Where Enterprise Feedback Management Fits into the BMC Business Service Management Model
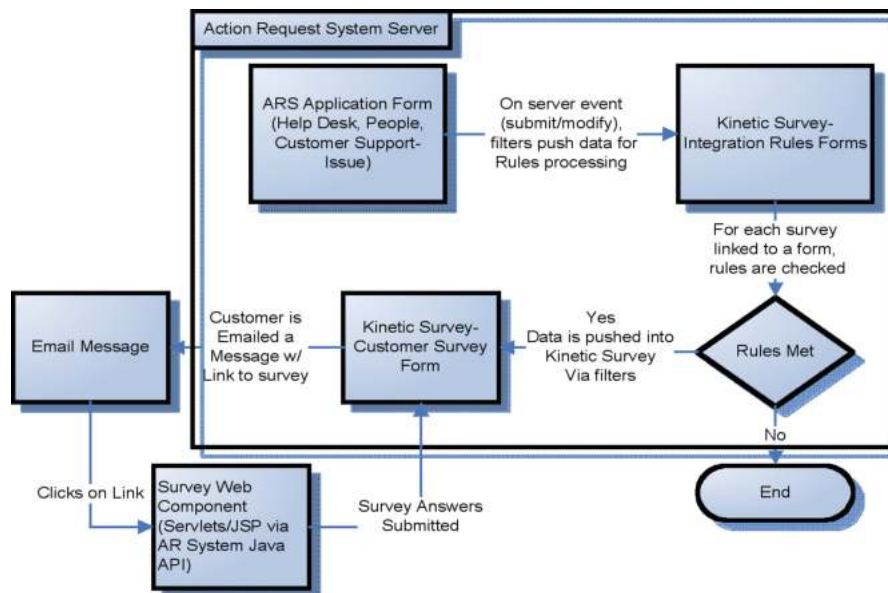
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Kinetic Survey provides EFM capabilities for the BMC BSM environment by adding a "people" element–feedback from users–to the underlying systems and processes. Kinetic Survey installs on the BMC Remedy ARS server application like any other BMC Remedy application and allows users to build surveys into BMC Remedy ARS processes that capture and measure "Quality of Service" and "Quality of Experience" metrics, whether in traditional IT functions like service desks and incident management, or in HR, product development, customer support and other areas. And because Kinetic Survey shares the same databases, interfaces, feature sets, reporting tools, and security and control features of all BMC Remedy ARS applications, it leverages existing resources and allows BMC Remedy administrators to standardize and control distributed EFM activities.

How Kinetic Survey Works

Built on BMC Remedy ARS, Kinetic Survey is easy to integrate with any packaged or custom-built BMC Remedy AR System application.

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Integrating an application to Kinetic Survey is a one-time process involving a few simple steps. Once the integration is in place, any licensed Kinetic Survey user can create rules to tie events within a BMC Remedy ARS application to one or more surveys. Users can also create one-time and scheduled batch surveys for specific campaigns, data validation or other situations. If a new survey is created, or the event that triggers an existing survey is modified, users can change the criteria without making code changes. Kinetic Survey stores basic information about the originating event including customer first/last name and ID, company name and ID, and up to five additional attributes for reporting. It also stores the originating source (form) and originating ID, allowing a link back to the original record for reporting purposes.

Kinetic Survey uses a highly configurable rules-based mechanism for triggering and filtering surveys. However, a group may require additional rules or functionality to handle a specific business need. Because Kinetic Survey is built on BMC Remedy ARS, functionality can be added using a company's existing tools, employees and infrastructure. Furthermore, the existing shared workflow is designed to be extended, making additional functionality more standardized in its implementation.

The graphic below shows a number of common uses for Kinetic Survey. Kinetic Survey sits atop the BMC Remedy ARS layer (which itself may be integrated with other enterprise applications, shown on the lowest layer) and leverages BMC Remedy ARS features and resources to provide a comprehensive EFM platform that serves numerous functional feedback needs.

Enterprise Feedback Management system based on BMC Remedy ARS

An EFM system based on BMC Remedy ARS provides several benefits:

BMC Remedy ARS can be easily extended into EFM. Designed as a service management platform, BMC Remedy is a natural repository for data and service process

KINETIC SURVEY ENTERPRISE FEEDBACK MANAGEMENT			
New Employee Forms	Customer Satisfaction	Specialized Product Support	Employee Data Management
Employee Requisitions	Agent Assessment	Outbound Sales	Online Testing/ Training
Systems/Process Change Requests	Event Follow-up	Recall Notices	Contract Detail Confirmation
Passwords Resets	Market Research	Contract Sales	Authorized User Verification
Purchase/Work Orders	Online Polls	Emergency Processes	Purchase Order Verification
Document Approvals	Product Performance	Related Item Sales	Product Configuration
Warranty Card Registration			Asset Management
Event Registration			
Online Forms	Surveys	Call Scripting	Data Validation
Customer Support–HR–Finance–Facilities–IT– Sales & Marketing–Operations–Management			

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and compliance management metrics needed to easily create, deploy, and gather event-based and batch external and internal customer feedback. The one missing link has been a BMC Remedy-specific EFM application that seamlessly integrates into the BMC Remedy ARS environment–a link provided today only by Kinetic Survey.

Shared IT resources/cost effectiveness. Using an EFM application built specifically for BMC Remedy ARS enables organizations to leverage their existing BMC Remedy ARS resources and support mechanisms and more effectively utilize their existing infrastructures. Kinetic Survey simply plugs into the BMC Remedy ARS environment, with no additional hardware, software (including databases or middleware) or support investments required and little training needed.

Kinetic Survey offers substantial savings over alternative EFM tools due to the consistent methodology, security, training, documentation and other standards that are applied enterprisewide through the BMC Remedy ARS framework. Kinetic Survey also allows BMC Remedy ARS organizations to apply and enforce consistent standards for branding and the "look and feel" of surveys–critical for large enterprises that currently confuse their customers with surveys and other feedback mechanisms that often vary considerably in format and level of professionalism.

More value from BMC Remedy ARS. Many organizations have limited their use of BMC Remedy to IT service management applications, but the BMC Remedy ARS architecture is capable of much more. Kinetic Survey is an easy way to add important value-added functionality to BMC Remedy in a cost-effective manner. Kinetic Survey can systematically gather feedback from a variety of sources (using all the various types of internal and external data source integrations built into BMC Remedy ARS) and continuously monitor business process improvement efforts. A variety of triggering events and batch-survey options ensures that surveys are timely, focused and flexible; and Kinetic Survey escalation options ensure that customer feedback leads to action rather than gathering dust. With Kinetic Survey, BMC Remedy capabilities can be extended into business processes such as:

Market Research
• Existing customer perceptions
• Prospect perceptions
• Competitive analysis
• Demographics
• Brand research

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External Customer Satisfaction
• Postservice
• Postpurchase
• Partner/distributor satisfaction
• Product/service enhancement requests
• Marketing mini-surveys during incident and customer support interactions

Internal Customer Satisfaction
• Training
• Reviews
• Benefits administration
• Suggestion boxes

Product Development
• Existing client needs
• Potential client needs

IT and ITIL-Based Services Management Practices
• Quality and timeliness of service delivery
• Continuous process improvement

ITIL service management compliance requires documenting business quality targets and responsibilities via service level agreements; but that's merely the first step in being a truly ITIL-focused organization. Outsourced IT services businesses can easily meet this requirement. Internal IT organizations need to go beyond documentation and regularly assess customer feedback and satisfaction processes–another ITIL fundamental, which is easily enabled by Kinetic Survey.[4] Moreover, Kinetic Survey makes it easy for IT organizations to demonstrate this assessment capability since it fits naturally into BMC Remedy ARS reporting processes, including those that share data from CRM, HRM and other databases. As one analyst has noted, for IT organizations, "It is all well and good to come up to scratch, even to perform above expectations, but it is not much good unless you can convey your competence to the powers that be."[5]

Conclusion

The BMC Remedy Action Request System has emerged as the most popular and versatile platform and development environment for automating and managing service management business processes. Today, few processes are as important as EFM, which systematically gathers and analyzes customer experiences to monitor and improve service management and other processes. Kinetic Survey is the only EFM tool

[4] Successful Delivery Toolkit, www.ogc.gov.uk
[5] Mary Ann Maxwell, Managing Director, META Group

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natively developed on the BMC Remedy ARS platform. It enables organizations to easily replace their old single-use, scattershot external and internal customer surveys with a comprehensive BMC Remedy ARS-based EFM platform for use in IT, market research, customer support, sales and marketing, HR, and other areas. It leverages the investment businesses have already made in BMC Remedy ARS and extends its value far beyond IT.

Because Kinetic Survey is built on BMC Remedy, it integrates easily to other ARS applications, packaged or custom built. Integrating an application to Kinetic Survey is a simple one-time process. Once Kinetic Survey is installed, BMC Remedy ARS administrators automate and centrally control enterprise survey processes and apply feedback and security rules, but the power to easily create and administer surveys is distributed across the enterprise. And since Kinetic Survey is a BMC Remedy ARS application and uses BMC Remedy reporting tools, businesses can easily combine Kinetic Survey and BMC Remedy data–including data from CRM, Marketing/Sales, HR and legacy applications linked to BMC Remedy–for timely data-driven insights into service management and other enterprise business processes.