KINETIC DATA

Your business. Your process.

How Kinetic Data Products Support Enterprise Request Management

Introduction

Enterprise request management (ERM) is a business efficiency strategy that combines an intuitive Web portal interface with integrated business process automation to improve delivery of business services and ensure first-time fulfillment. ERM enables organizations to accelerate business service delivery and reduce costs while dramatically improving the customer experience. The goal of an ERM strategy is to allow business service providers to meet enterprise service delivery requirements in shared-service environments in a scalable, cost-effective, and above all, customer-centric manner.[1]

The delivery of services from various internal functional groups is commonly based on the preferences of each group and is designed for their convenience. As a recent report from Interactive Intelligence Group puts it, “Many firms perform their business processes with no attempt to delight the customer.”[2] Typically, in shared-service environments—in which departments such as Information technology (IT), human resources (HR), facilities, marketing, and accounting deliver business services—each business area has its own systems and processes in place for delivering services.

These approaches are function-centric rather than customer-centric. They require users to learn and use multiple methods for requesting the services they need, and to “manage” their own service requests (e.g., following up with emails and phone calls to “see where things are at” and keep needed approvals and processes moving along). The result of these inconsistent and manual processes is frustration and lost productivity.

The negative impacts of this "siloed" approach to service management are multiplied for complex requests that require services from multiple departments—for processes such as onboarding a new employee or coordinating resources for a development project. The internal customer must learn to interface with several different functional systems along the way, delaying fulfillment and increasing training costs. And if these disparate functional systems don't communicate with each other, error-prone manual data re-entry is required, leading to further inefficiencies, as well as to redundant and potentially mismatched data in different systems.

This white paper describes the technology components required to implement an ERM strategy, and more specifically how Kinetic Data software applications support key operations in the ERM framework.

Benefits of ERM

ERM offers a more efficient and effective model for managing service request business processes than common function-specific approaches. In this federated collaboration concept, a single, easy-to-use request portal replaces the typical mishmash of emails, phone calls, hallway conversations, faxes, and disparate department-specific paper and online forms. The portal provides a single *system of engagement* between service requestors and data within the departmental software—or *systems of record*—that must be added, deleted or changed to fulfill the request. The portal connects to existing enterprise or departmental platforms and data sources through an automated workflow management "backbone" system, or orchestration engine, that automatically manages approvals, scheduling and fulfillment using secure communication among the applications involved.

Note to Readers

The Kinetic Data white paper The Technology Behind Enterprise Request Management defines the software components required to implement ERM in generic terms.

This white paper covers much of the same ground, but focuses specifically on how Kinetic Data products support an ERM strategy and where each of the company's products fit within the end-to-end ERM model.

ERM is a customer-centric approach that substantially improves the user experience. In addition, this approach:

1. reduces fulfillment costs;
2. accelerates fulfillment time;
3. ensures first-time fulfillment;
4. avoids redundant data-entry errors;
5. eliminates the need for customers to learn and use multiple system interfaces; and
6. frees users to work on higher-value tasks instead of managing their requests.

Core Components of ERM

The three foundational requirements for ERM are:

- **Request management portal software** with an intuitive Web/mobile interface that can be used to define and request any type of service, resource or equipment from any department including IT, HR, operations, finance and accounting, facilities, and other areas that field large volumes of service requests.

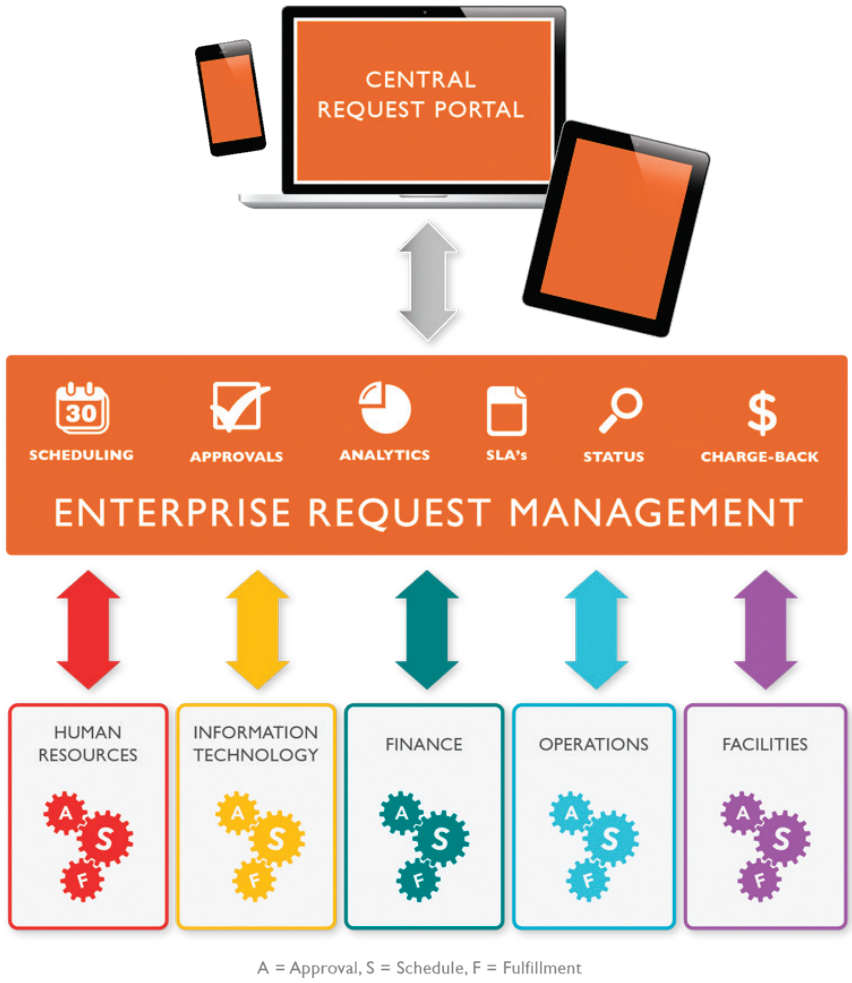
- **Business process automation software** that automates approval routing, scheduling, and fulfillment processes once a service request is submitted, through secure communication with and between the various back-end applications and federated data sources and control systems involved in fulfilling the requests.

- **Core enterprise and departmental software** applications for management and control, such as ERP, finance, HR, ITSM, and CRM platforms. The ERM approach is designed to leverage existing systems wherever possible. Most organizations will therefore already have much of the technology infrastructure for ERM in place and will need only to “fill in the gaps” in order to implement an ERM strategy.

More specifically, ERM requires technology components that can orchestrate the seven key process elements detailed on the following page.

The remainder of this white paper describes how Kinetic Data products provide key elements of the foundation, enable many of the functional requirements of ERM, and integrate with in-place applications to create a complete ERM framework.

The Technology behind ERM



A = Approval, S = Schedule, F = Fulfillment

1. PORTAL Kinetic Request

ERM starts with an online enterprise business service catalog of common service items. These service items can be created by any business functional manager or process owner, with minimal technical assistance. Existing service items can be cloned and modified to meet the specific needs of any group.

Rather than requiring the customer to navigate different screens or even different systems, **Kinetic Request** is designed to simplify the process by enabling any type of service request to be quickly entered via a single, intuitive, Web-based request portal on a desktop or a mobile device.

Alternatively, an ERM process may be triggered by a form submission or an automated event (e.g., reaching a specified date automatically sends an email message reminding a customer to renew an annual maintenance agreement).

As a system of engagement, Kinetic Request easily integrates with systems of record needed to complete the ERM fulfillment process, including all major ITSM, ERP, HR, and other applications, such as BMC, HP Service Manager, PeopleSoft, Saleforce.com, and ServiceNow. With Kinetic Request, a catalog of common service items can be built out quickly using rapid-deployment tools.

2. 

Kinetic Task, Kinetic Schedule, Kinetic Calendar

Once a request has been initiated, it must be assigned to individuals or teams for fulfillment. Depending upon the nature of the request, scheduling may be automated or may require human intervention using a scheduling tool to coordinate schedules for personnel, resources, and facilities. **Kinetic Task**, an advanced workflow automation engine, allows automated fulfillment processes to be integrated across the enterprise. It features an open architecture, which allows it to be extended to work with any targeted system that supports communication via common methods (API's, Web Services, SOAP, REST, etc.).

In an ERM process, Kinetic Task serves as the backbone, providing secure two-way communication with enterprise systems to manage approvals, automated scheduling and secure fulfillment. When scheduling can't be automated, **Kinetic Schedule** takes multiple data parameters related to resource scheduling needs and provides a user-friendly interface that allows for easy and accurate scheduling decisions to be made. It provides visibility into key business processes in an actionable format. Kinetic Schedule gives human schedulers the ability to coordinate personnel, equipment and facilities resources for fulfillment in ERM processes.

At a higher level, **Kinetic Calendar** displays, combines and overlays time- and date-based information from virtually any source to identify and help avoid conflicts in human-managed resource scheduling.

3. 

Kinetic Task

When approval from a manager or system owner is required for an order, expenditure, system access, or other request in order to proceed, Kinetic Task ensures that requests for approval (and follow-up reminders, if necessary) are automatically sent to the appropriate individuals or teams before the service request or other task can move forward. This avoids “overlooked” email messages, or the need to manually track approval status in a separate spreadsheet or project management tool. It also simplifies management of complex requests that require multiple levels of approval, such as from legal or finance departments.

4. 

Kinetic Task, Kinetic Survey, Kinetic Info

Beyond managing requests, ERM is a framework for improvement that is driven by constant measurement to help continuously improve service delivery efficiency and customer satisfaction. Kinetic Task automatically records key metrics in the ERM process, including the elapsed time required to complete each step in a Kinetic Task workflow, to help identify and eliminate bottlenecks.

Kinetic Survey can trigger context-sensitive surveys on the fly to systematically gather and analyze customer experiences, to monitor and improve service delivery management.

Kinetic Info is a cloud-based “social” service KPI dashboard that allows managers and teams to monitor and share comments and suggestions specific to key service performance metrics, such as incidents created, SLA violations, and self-service incident logs. Data is collected periodically based on a configurable schedule—daily, hourly, even minute-by-minute—from virtually any enterprise source using prebuilt data generators, and displayed visually via a dashboard of key charts.

Data from all three Kinetic Data products can be included in business intelligence applications such as Crystal Reports and Cognos for advanced analytics.

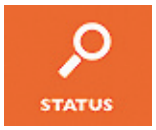
5. 

Kinetic Task, Kinetic Info, Kinetic Survey

Service fulfillment times, particularly those involving IT groups, are often negotiated between service providers and service recipients, and may be subject to periodic reviews. In an enterprise, SLAs cover all generic service-level-management issues common across the organization. Since many service management issues are relatively unchanging in an enterprise environment, SLA updates may be less frequently required than in other environments.[3]

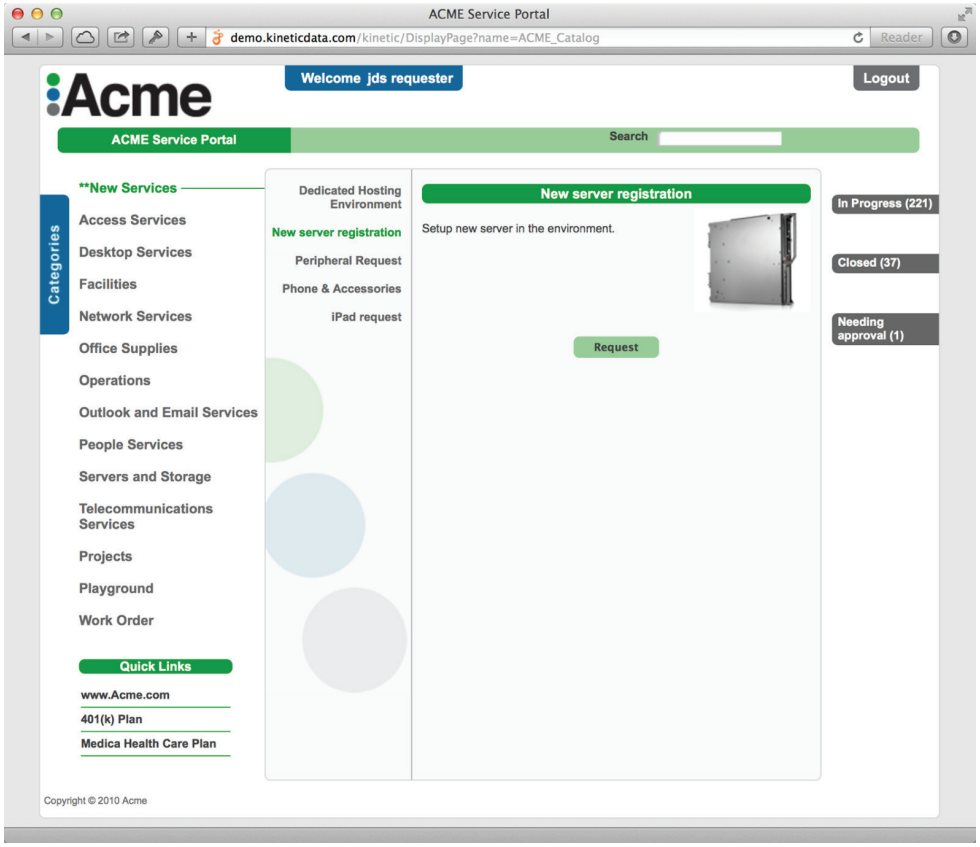
In the ERM approach, SLAs are handled differently in two fundamental ways. First, rather than periodic negotiations between service providers and customers, SLAs are based on actual service delivery times automatically recorded by ERM tools such as Kinetic Task. This provides a more accurate and realistic approach to developing SLAs.

The second difference is that, rather than being static documents, SLAs in an ERM approach are a moving target subject to continuous improvement. This requires both the *metrics* collected by Kinetic Task, Kinetic Info, or another third-party analytics application, as well as frequent context-sensitive *customer feedback* provided by applications such as Kinetic Survey.

6. 

Kinetic Task and Kinetic Request

One key characteristic of ERM is giving service requesters and managers alike visibility into the current state of the progress toward completion of a task or delivery of a service or physical item. Since multiple systems may be involved, this requires a tool like Kinetic Task, which can be used to create processes that automatically read and update data from multiple systems or federated data sources (e.g., the purchase of a new laptop for an employee requires updates to IT management, accounting, HR, and other enterprise applications). Throughout the process, both customers and the managers in charge of service fulfillment can view the status of a service request at any time through the Kinetic Request portal.



7. CHARGE-BACK Kinetic Task and Kinetic Survey

In addition to the activities described above, ERM must support other parts of the service management process, including charge-backs, or the assignment of the cost of the service delivery to the appropriate department; ERM must also have the ability to aggregate and combine service measurements for advanced analysis and decision-making regarding resource allocation, time and cost savings, and continuous improvement on service delivery quality.

Charge-backs (for internal services) and billing (for external customers) are managed through corporate accounting and finance applications such as SAP or Oracle. Kinetic Task can manage data flows between these systems and other applications used in the ERM process to accurately assign costs to service elements, report at an aggregate and detail level, and produce and distribute invoices where needed.

In terms of qualitative data, Kinetic Survey provides actionable information for analysis and continuous process improvement. It enables managers to automatically collect data specific to service processes (e.g., was the item delivered within the promised time window? Was it properly configured and operational before the technician left the premises?) rather than just simple, generic satisfaction metrics such as star ratings.

Note that ERM is "function-agnostic"—meaning it can apply to any type of service (IT, HR, facilities, etc.). With the ability to integrate with any data source, Kinetic Data products meet this need perfectly. With Kinetic Request, request portals and workflows can easily be created and modified to match the specific requirements of any department or group.

Similarly, with Kinetic Task, automated processes are created with drag-and-drop simplicity to match the specific workflow requirements of any area in the enterprise. The service customer has a single interface for requesting any type of service, at any time and from any device, as well as visibility into the status of the request, without needing any understanding of the specific back-end processes. Tasks are automated wherever possible, minimizing fulfillment time, labor hours, and the risk of errors due to manual data entry.

Summary

Unlike siloed request management systems, ERM uses a universal front end for entry and tracking of any type of request, and back-end business process automation of key components of the service delivery process. The four primary benefits of ERM are:

1. An improved user experience;
2. Centralization of business services;
3. First-time and automated fulfillment; and
4. Leverage of existing systems.

Kinetic Data products provide much of the functionality required by ERM and allow organizations to develop a complete ERM strategy by seamlessly integrating front-end service request portals with existing software platforms in IT, HR, finance and other areas. The result is faster service delivery and reduced costs for the enterprise, and a simpler, frustration-free experience for service requesters.

Kinetic Data products discussed in this white paper

Kinetic Request is the leading service request management (SRM) portal on the market today. Service requests submitted through a Kinetic Request portal can serve as triggers to initiate ERM processes.

Kinetic Task is an advanced workflow automation engine that allows business processes to be integrated across the enterprise. It features an open architecture, which allows it to be extended to work with any targeted systems that support communication via common methods (API's, Web Services, SOAP, REST, etc.). In an ERM process, Kinetic Task serves as the backbone, providing two-way communication with enterprise systems to manage approvals, automated scheduling, and fulfillment.

Kinetic Survey is a process-driven, Web-based customer-feedback-survey management software application. Kinetic Survey makes it easy to create context-sensitive surveys for measuring and reporting on user satisfaction upon completion of an ERM process.

Kinetic Calendar provides visibility into key business processes in an actionable calendar format. Because it can display, combine and overlay time- and date-based information from virtually any source, Kinetic Calendar is an ERM reporting tool that can also identify and help avoid conflicts in human-managed resource scheduling.

Kinetic Schedule takes multiple data parameters related to resource scheduling needs and provides a user-friendly interface that allows for easy and accurate scheduling decisions to be made. Similar to Kinetic Calendar, it provides visibility into key business processes, giving human schedulers the ability to coordinate personnel, equipment, and facilities resources for fulfillment in ERM processes.

Kinetic Info is a real-time "social" dashboard of key service delivery metrics and trends. Drawing on lessons learned from social media, Kinetic Info enables managers to view, comment on and share key real-time service delivery performance trends from virtually any enterprise data source. Unlike complex business intelligence or analytics tools, Kinetic Info displays only key service performance metrics in one easy-to-understand dashboard view. Cloud-based, it can be used by any manager or team member for true collaborative decision making.

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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 Enterprise Request Management (ERM), an integrated system with a centralized request portal for automating request management. Kinetic Data was named “Innovator of the Year” in 2009 by enterprise software users, and it also has been recognized with awards for its superior customer service and support. The company serves customers from its headquarters in St. Paul, Minn., offices in Sydney, Australia, and through a network of reseller partners.

For more information, visit www.kineticdata.com.

[1] See” Enterprise Request Management: An Overview” at
http://www.kineticdata.com/products/request/whitepapers/KineticRequest-ERM-WhitePaper.html
[2] “Humanizing Business Process Automation: Optimizing Performance for Employees and Customers,” Jesse Clark and Rachel Wentink, Interactive Intelligence Group, January 2012.
[3] http://en.wikipedia.org/wiki/Service-level_agreement