

# ITSM FOR MID-MARKET GROWTH: LESSONS FROM EVOLUTIONARY JOURNEYS

September 27, 2023



## What will we hear today?

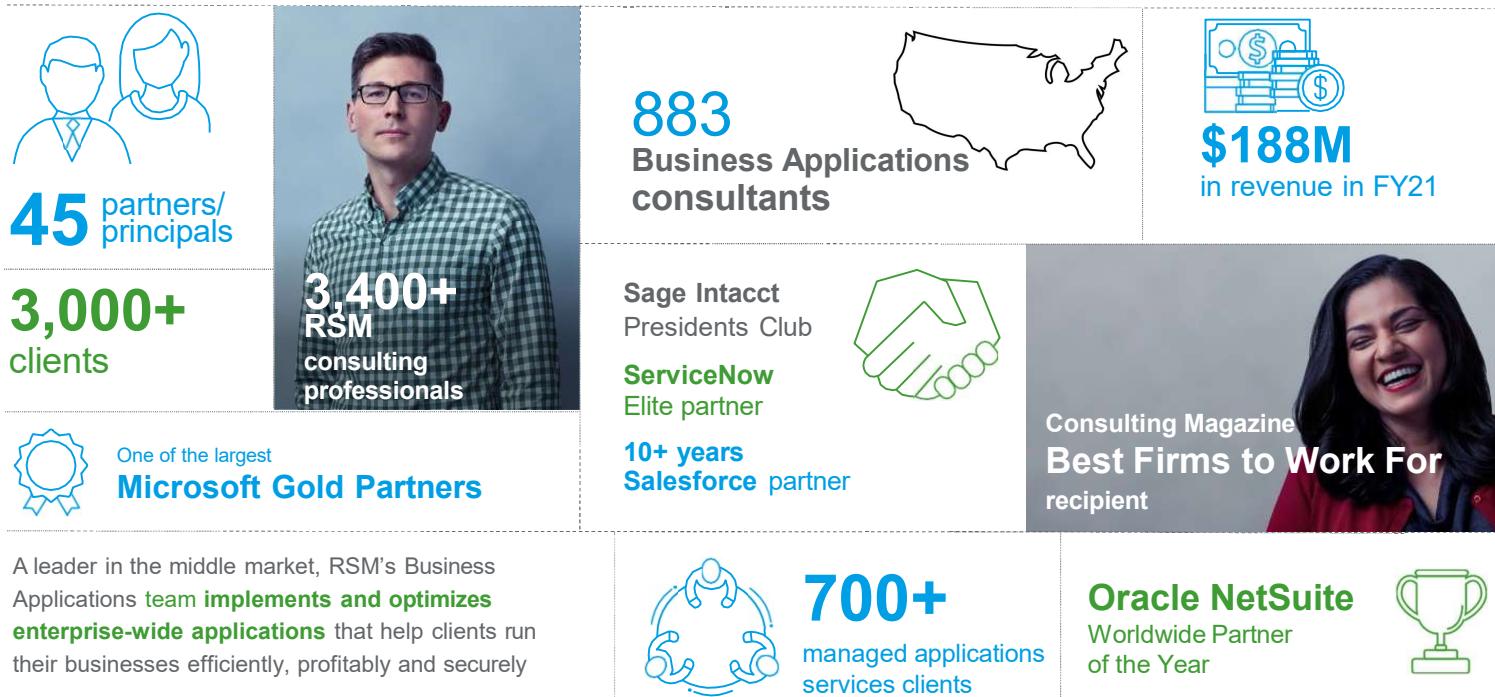
---

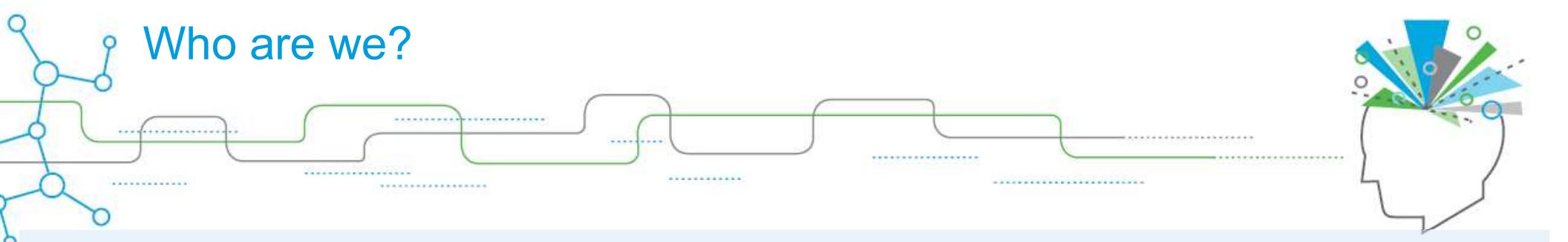
- A story of a company that grows up and has IT problems
- A story of a company that sounds somewhat or very similar to yours
- Advice from distinguished experts about when it's time to evolve and what to do

Custom Lumber



# RSM Business Applications practice by the numbers





## Who are we?



**Lou  
Savalli**

Manager,  
ServiceNow  
Consulting



**Troy  
DuMoulin**

VP, Research  
& Development  
Pink Elephant



**Curt  
Melancon**

Director,  
ServiceNow  
Consulting



**Amy  
Zaretsky**

Functional  
Consultant  
Supervisor

By the end of the webinar, you will be able to...

Identify the symptoms of startup growth/fragmented system architecture

Explain the challenges with costs and resources of overhauling IT's operating ecosystem to an enterprise class solution

Explain the value of a consolidated, enterprise class ITSM solution

Recognize which ITSM processes typically are adopted and matured earlier for mid-market sized organizations

## First month

---

Total Employees: 5

IT Dept: 0



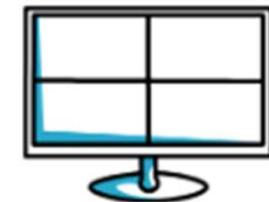
Operations



Anna Thomas



Business Operations

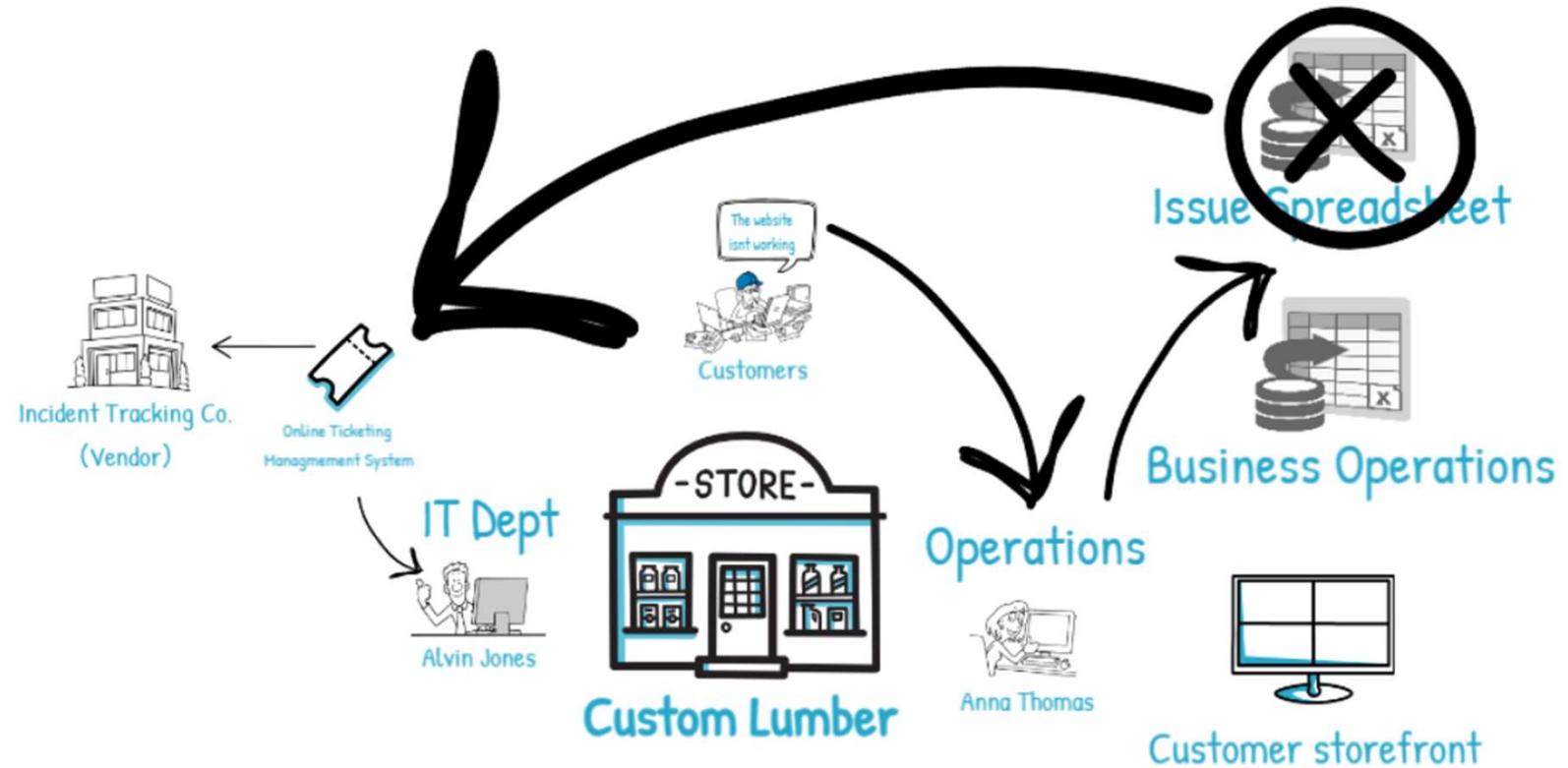


Customer storefront

## Third month

Total Employees: 12

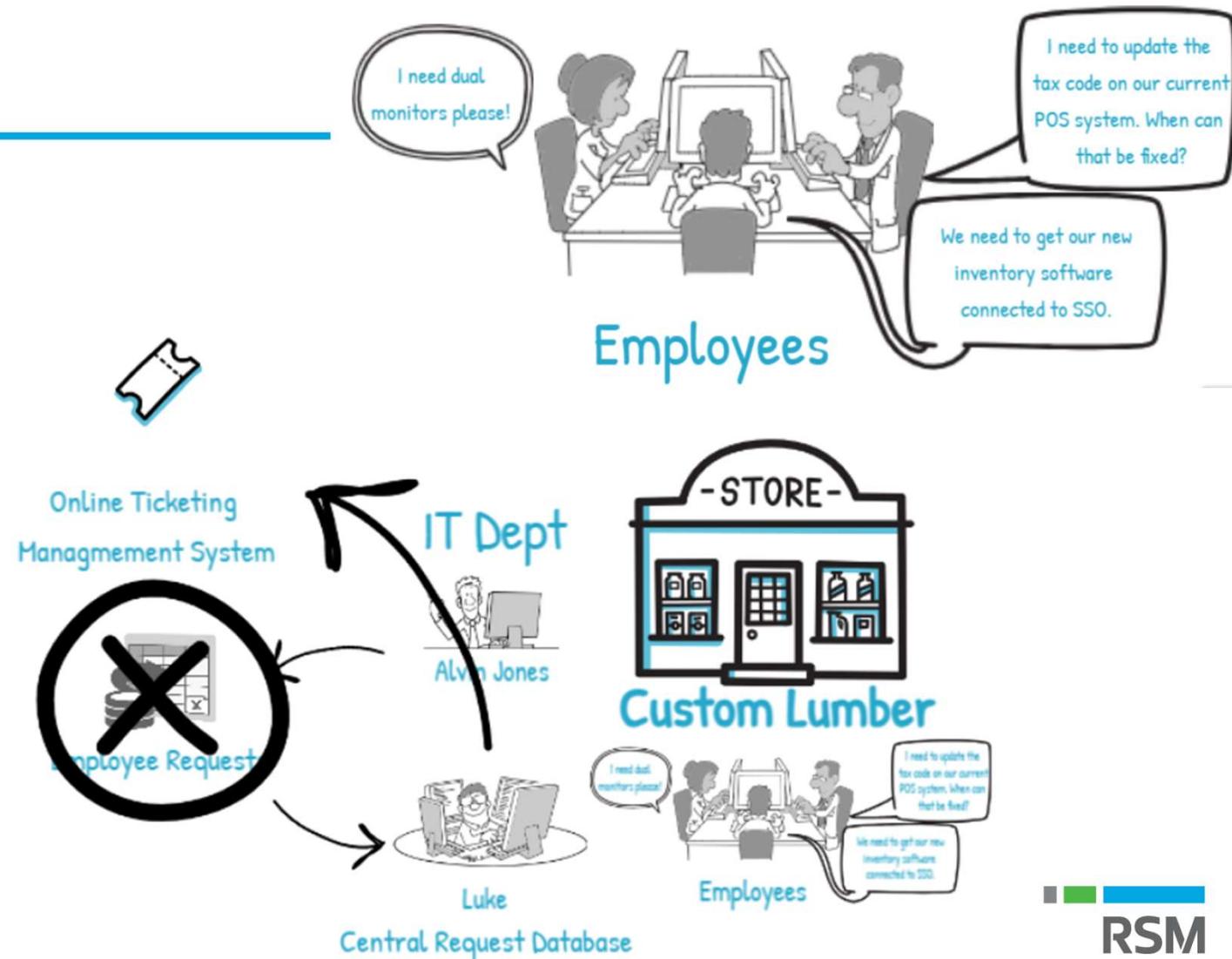
IT Dept: 1



## Sixth month

Total Employees: 18

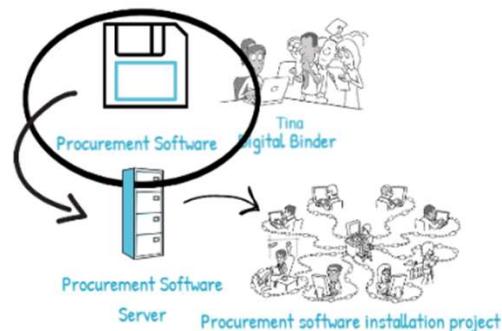
IT Dept: 4



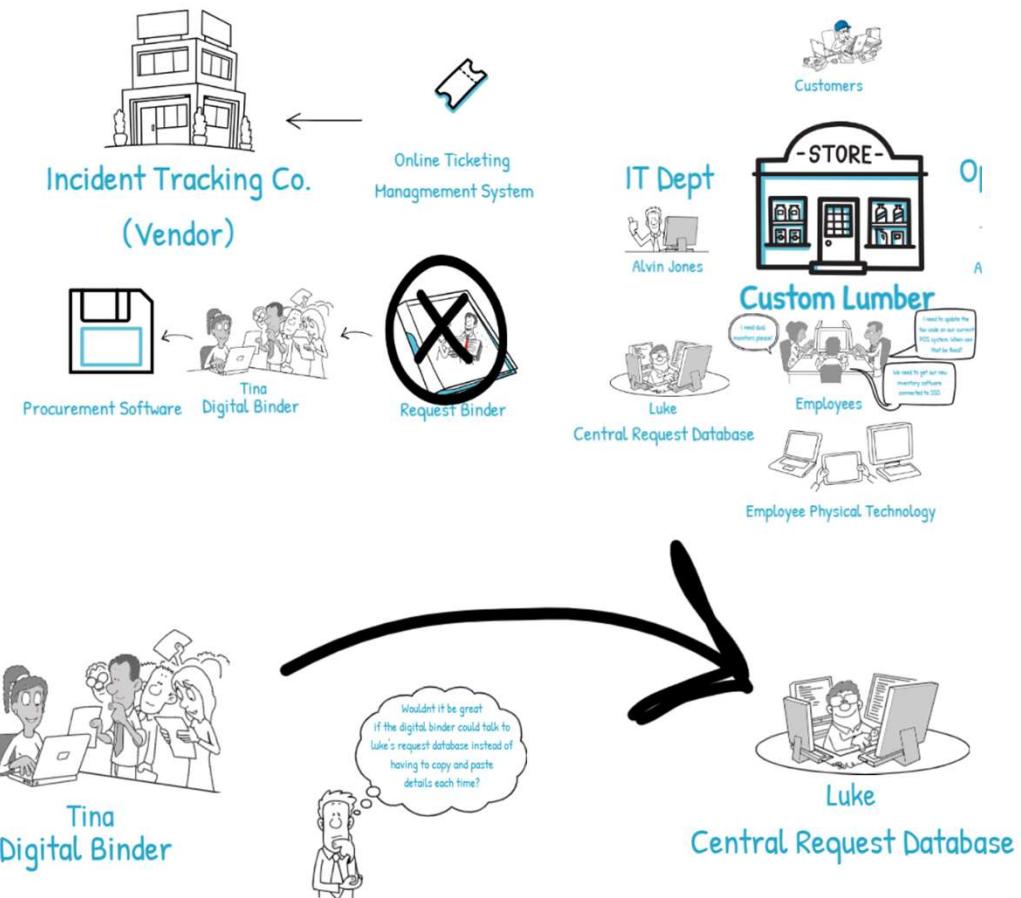
# Year one

Total Employees: 24

IT Dept: 6



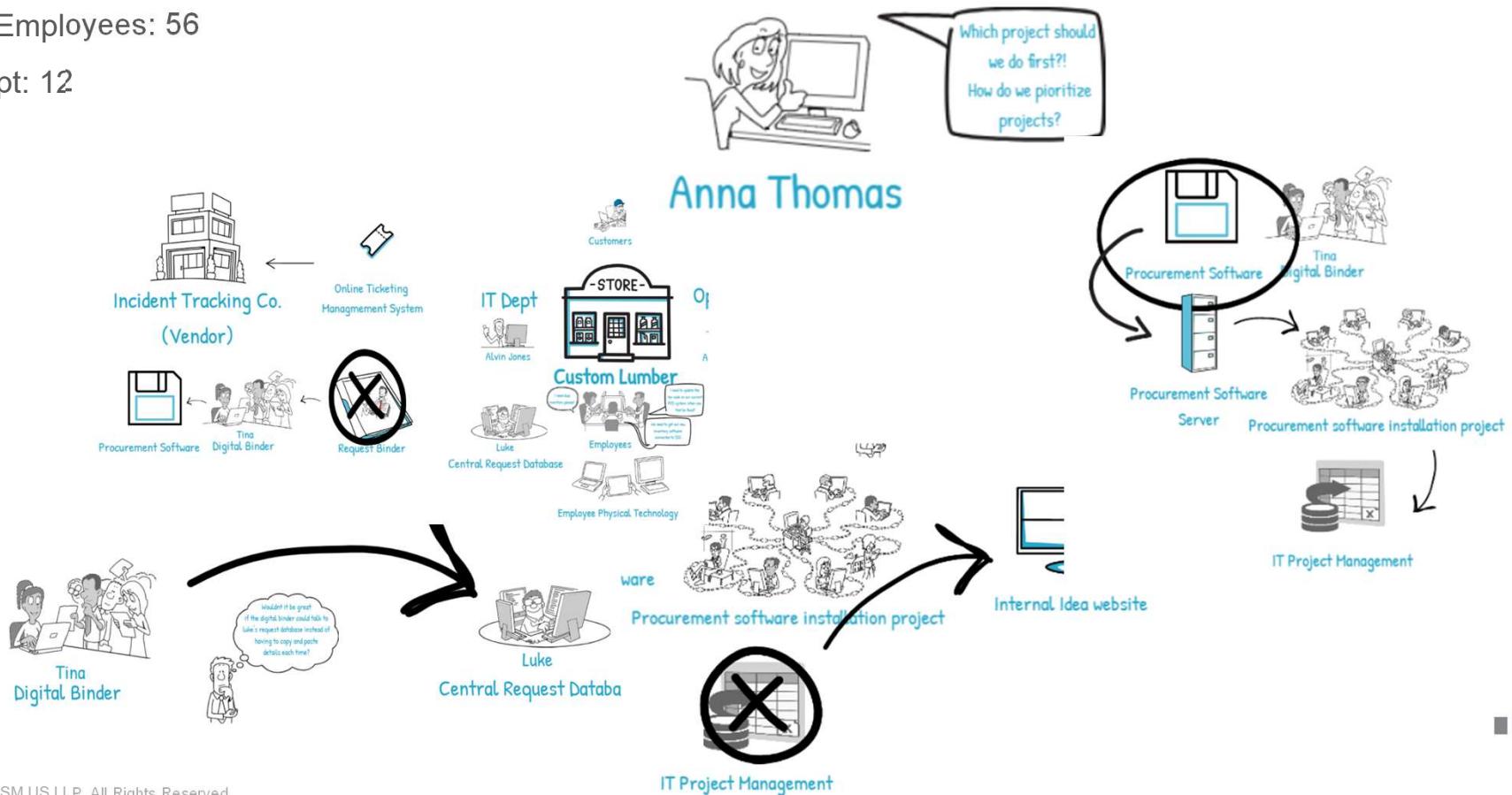
IT Project Management



## Year two

Total Employees: 56

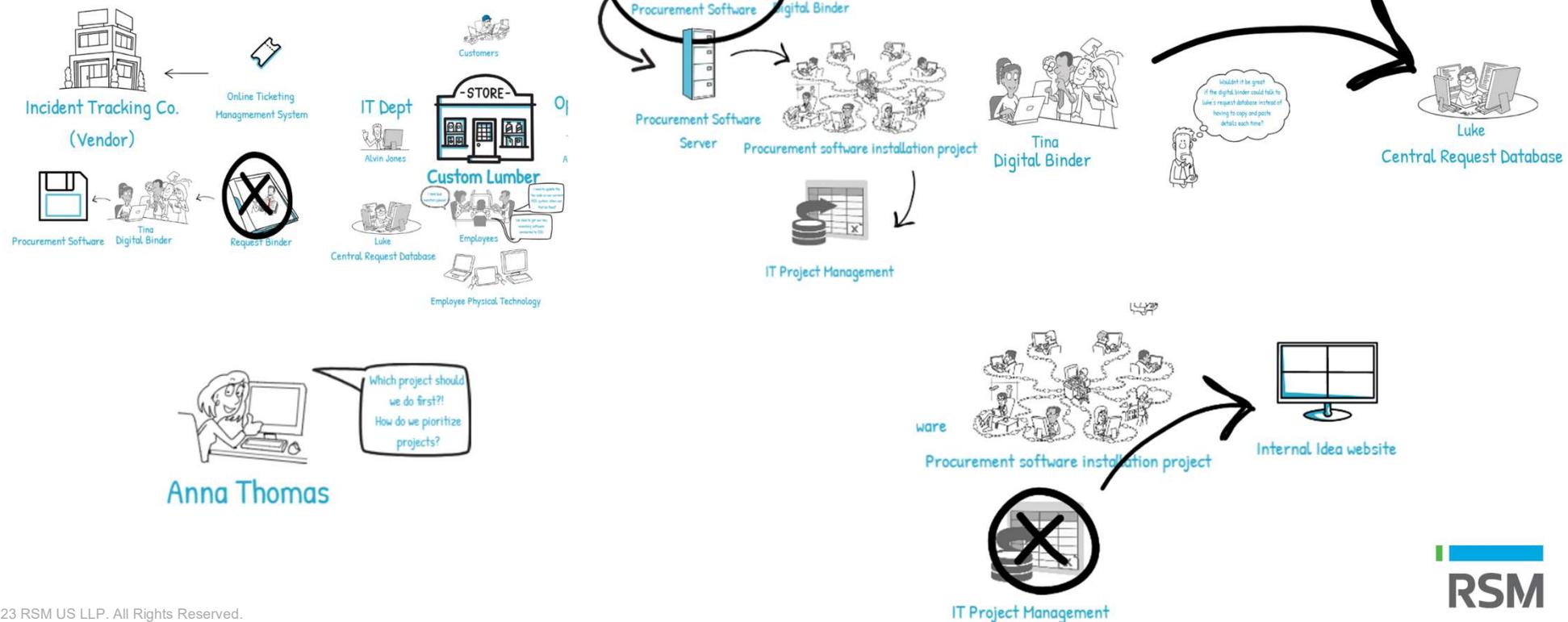
IT Dept: 12



# Year three

Total Employees: 56

IT Dept: 12



## The service desk – Early stages



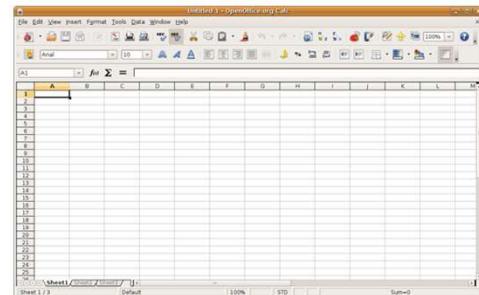
A functional unit responsible for dealing with a variety of service activities

Handles: Incidents, requests, knowledge, queries, problems, complaints, scheduling.....

Friendly, empathetic soul



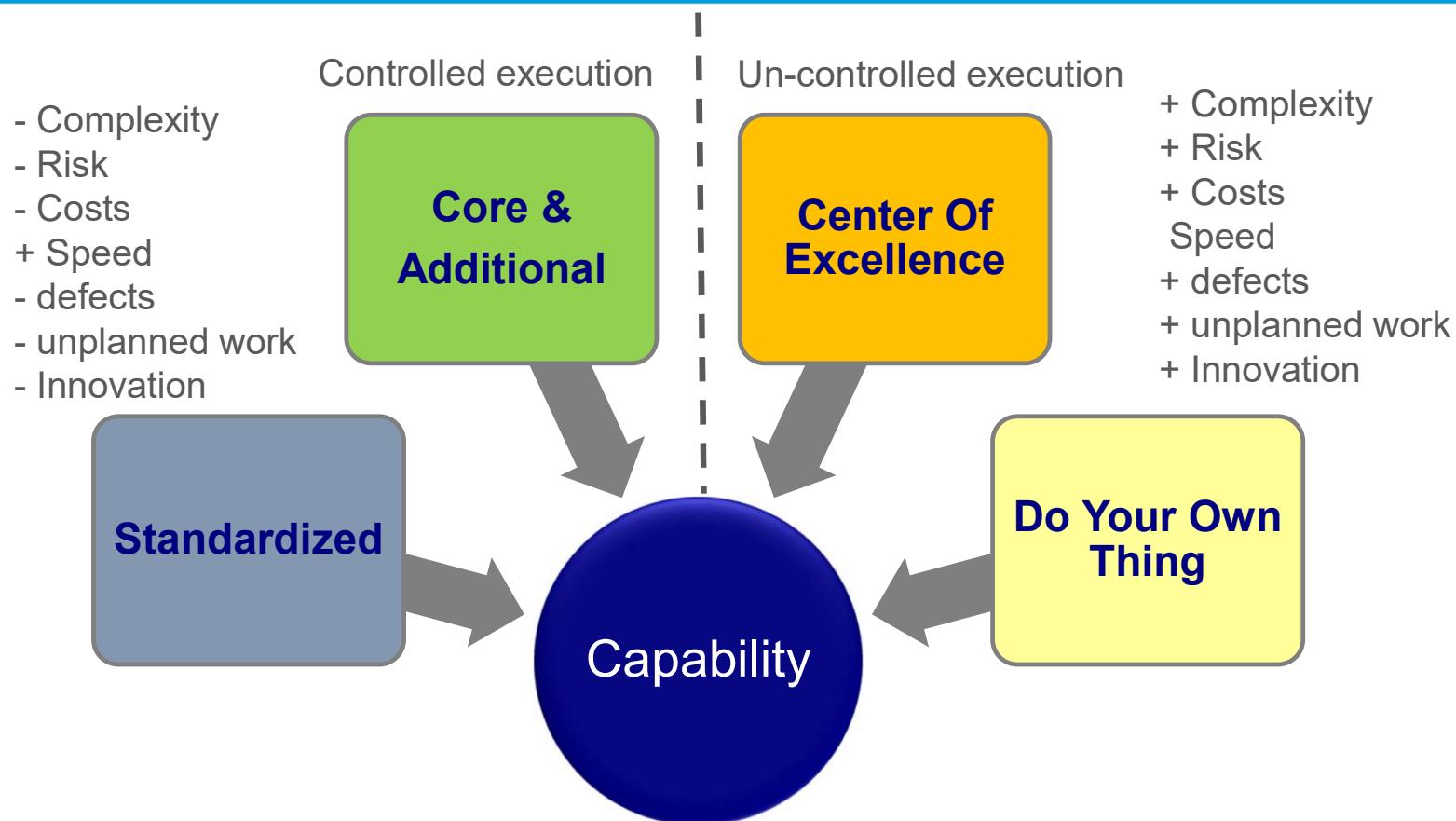
Basic tracking



Everything is a ticket!



# Capability standardization levels



# Cost of complexity – The three M's of loss



**MURA**

## **Variability, redundancy, complexity**

Variability in the form of multiple processes, tools and approaches increases unplanned work



**MURI**

## **Overburden, overworked, and or high stress**

Caused by rigid service timeframes, release windows, and other such time constraints

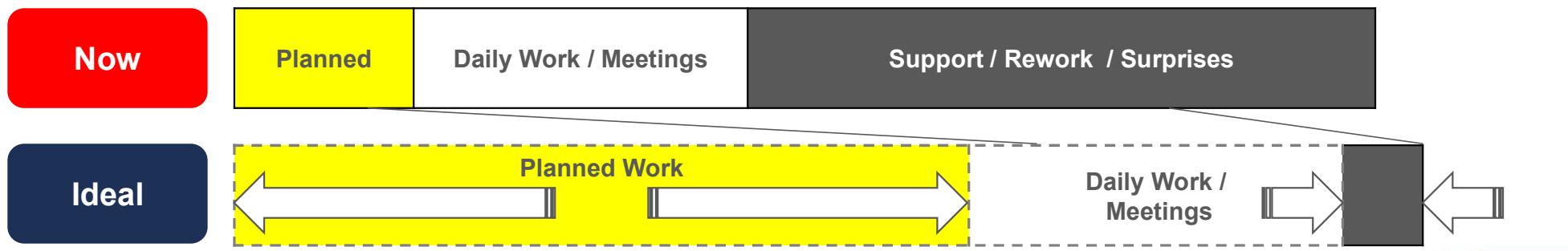


**MUDA**

## **Waste, uselessness, futility**

Things that are being done but add no value, distracts from and negatively impacts value

# The tyranny of unplanned work



## What is IT service management



A set of **capabilities** and **processes** to direct and control the **organization's activities** and resources for the planning, design, transition, delivery, and improvement of services **to deliver value**



- International Organization for Standardization. *ISO/IEC 20000-1:2018 Information Technology – Service Management – Part 1: Service Management System Requirements*. Switzerland: ISO Copyright Office, 2018. Accessed June 5, 2023.  
<https://www.iso.org/standard/70636.html>



## Example IT capabilities

- Example: IT business management capabilities
  - IT strategy and planning
  - IT governance and compliance
  - Portfolio and project management
  - IT financial management
  - Service delivery & support
  - Vendor and contract management
  - Information security and risk management
  - IT business continuity and disaster recovery
  - IT architecture and standards
  - IT talent management
  - Stakeholder and relationship management

# ITSM 101 – The basics



- **Incident management** - Fix something that is broken
- **Request management** - I need.... by this date...
- **Knowledge management** - How do I...?
- **Change management** - When you make changes to key IT systems, please don't break other things
- **Portfolio & project management** - Help me to use new technology and automation to support mission goals

## ITSM roadmap – Early maturity

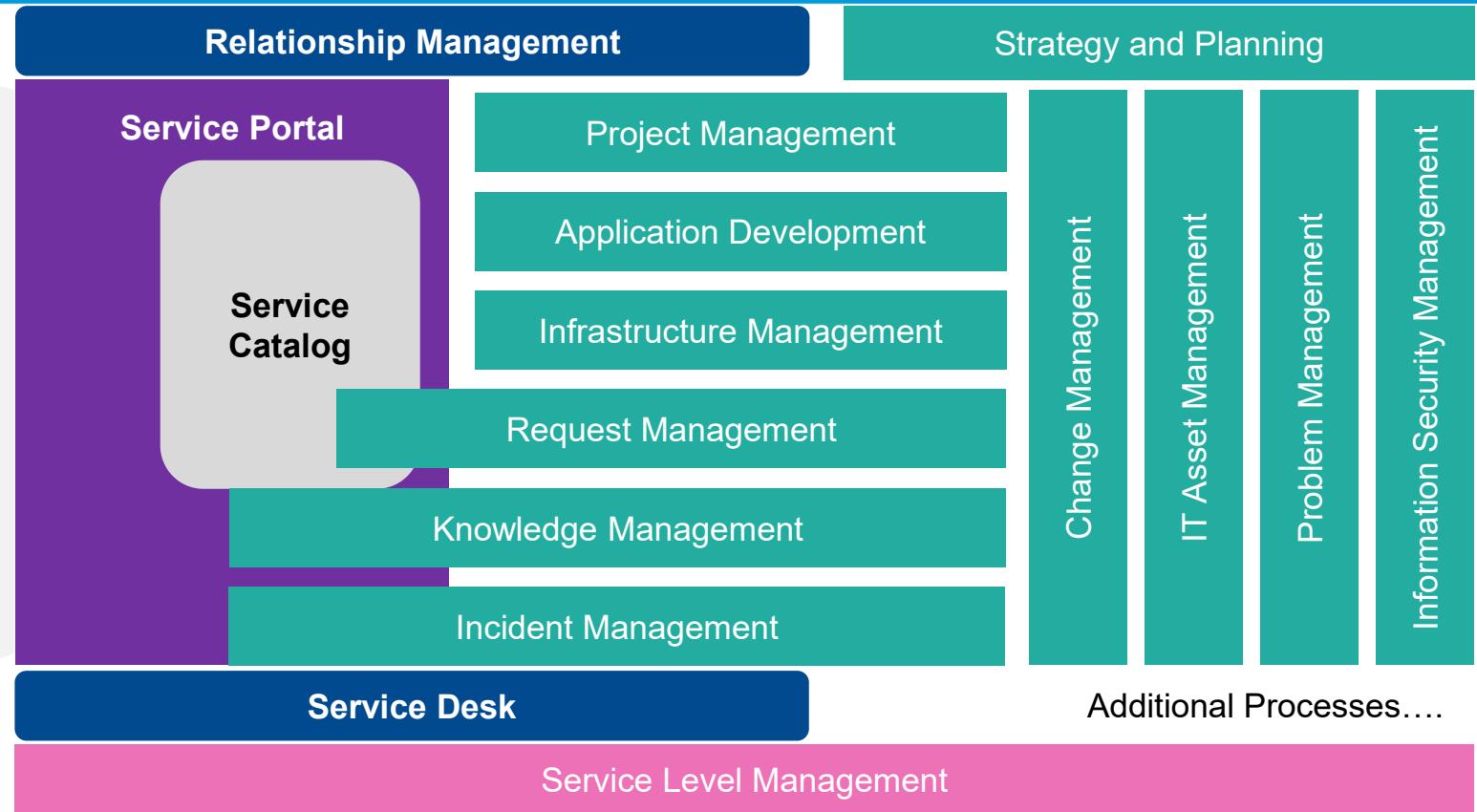


- **Stage 1:** Stop the help desk horror stories and the incident ticket black hole (Service desk, incident and problem)
- **Stage 2:** Give me a way to rapidly find requests and receive what I need (Portal, request catalog, request management)
- **Stage 3:** Establish visibility, scheduling and appropriate authorization for changes to production (Change management)

# Service portal automation and ITSM process integration



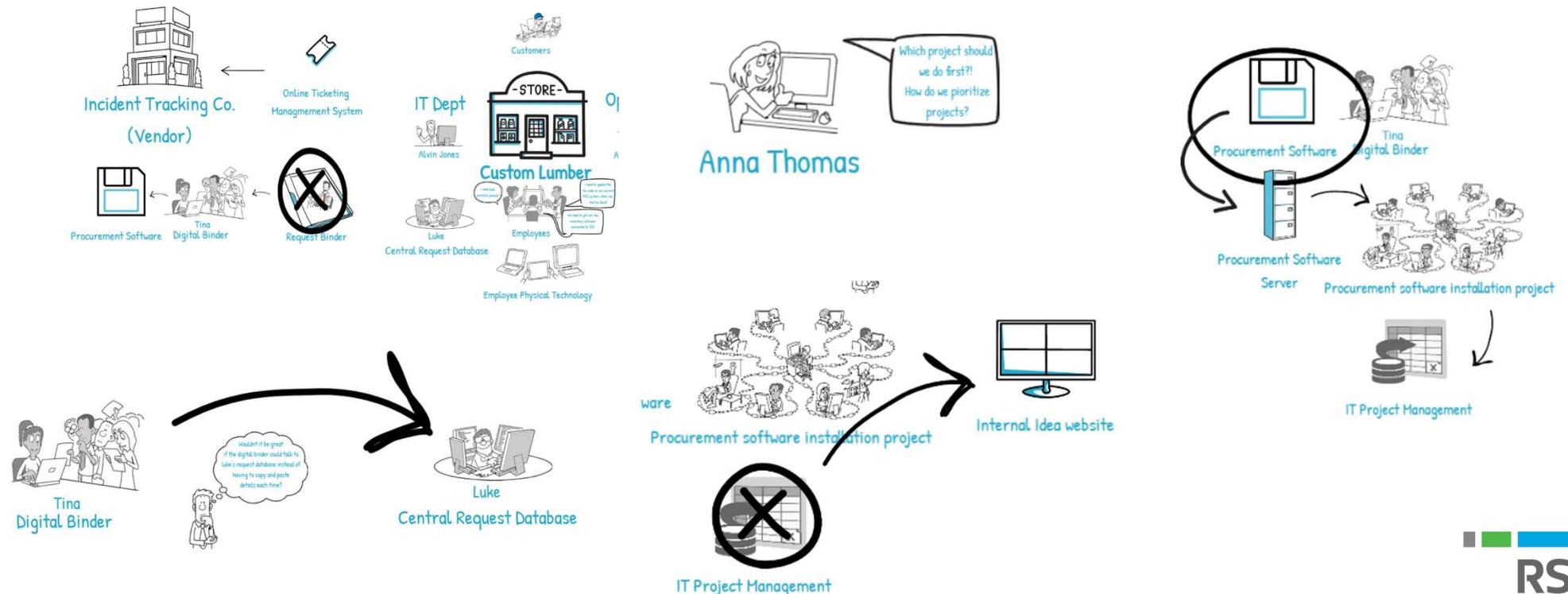
Need service?  
Need information?  
Need help?



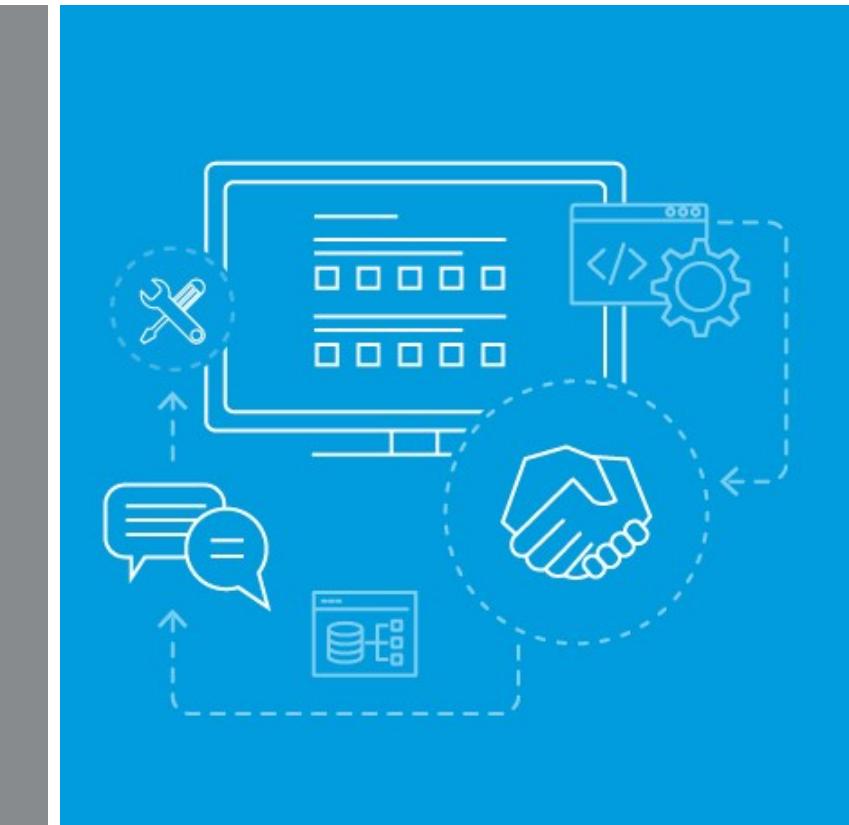
# Year three

Total Employees: 56

IT Dept: 12



# RSM WorkHub



A best practice, off-the-shelf solution developed by RSM

Specifically designed for middle market companies

RSM owns, manages and supports WorkHub

- It's powered by RSM's own instance of ServiceNow
- Clients lease access to RSM's ServiceNow instance

The RSM solution includes:

- RSM's dedicated advisors
- Best practice processes
- RSM's support resources

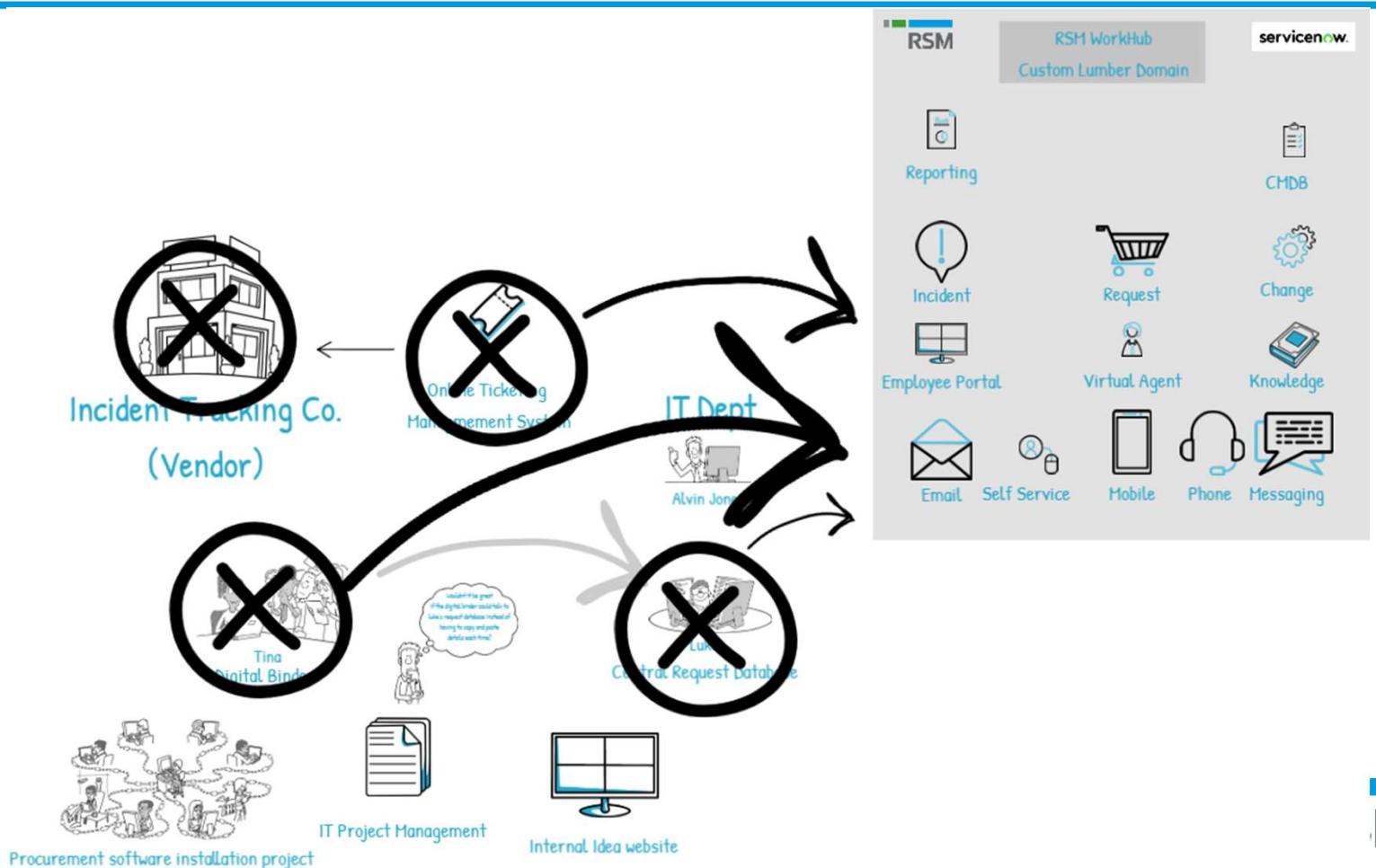
# RSM WorkHub capabilities



- Consolidated solution for operations and project management.
- Visibility of all work
- Omni-channel intake into single system
- SLAs to drive a consistent customer experience across processes
- Single data base for reporting

## Year four - Transition

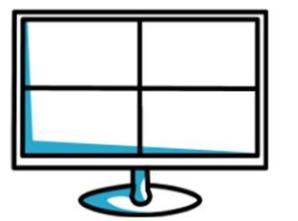
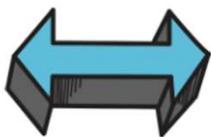
- Service Desk operations consolidated
- Not all capabilities utilized in first year on WorkHub
- IT project management still isolated



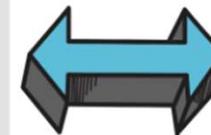
## Year four end state



Employees  
End users

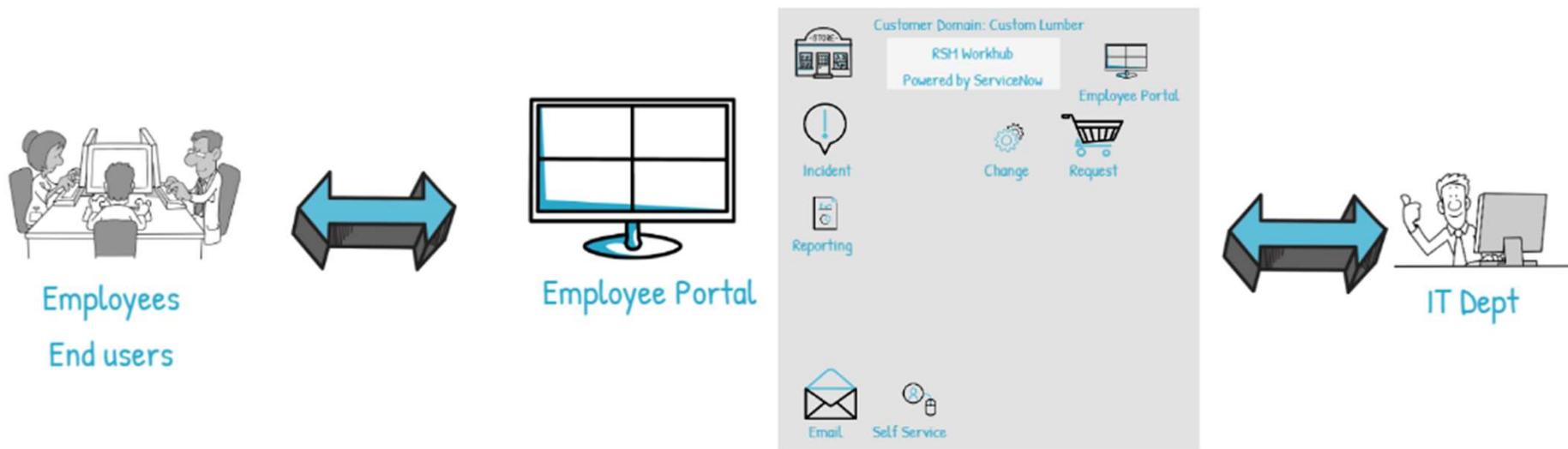


Employee Portal



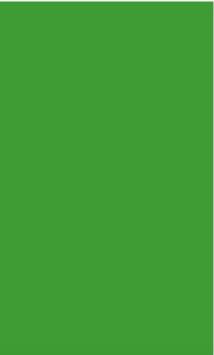
IT Dept

## WorkHub interaction with employees



# THE POWER OF BEING UNDERSTOOD





This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit [rsmus.com/aboutus](http://rsmus.com/aboutus) for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.

© 2023 RSM US LLP. All Rights Reserved.

