

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

September 27, 2023

## What will we hear today?

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- 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

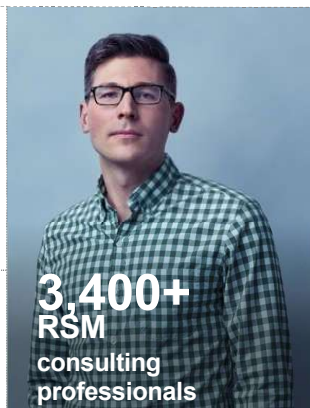


**45** partners/  
principals

**3,000+**  
clients



One of the largest  
**Microsoft Gold Partners**



**3,400+**  
RSM  
consulting  
professionals

**883**

**Business Applications  
consultants**



**Sage Intacct**  
Presidents Club

**ServiceNow**  
Elite partner

**10+ years**  
**Salesforce** partner



**\$188M**

in revenue in FY21



Consulting Magazine  
**Best Firms to Work For**  
recipient

A leader in the middle market, RSM's Business Applications **team implements and optimizes enterprise-wide applications** that help clients run their businesses efficiently, profitably and securely



**700+**

**managed applications  
services clients**

**Oracle NetSuite**

Worldwide Partner  
of the Year



# Who are we?



**Lou  
Savalli**

Manager,  
ServiceNow  
Consulting



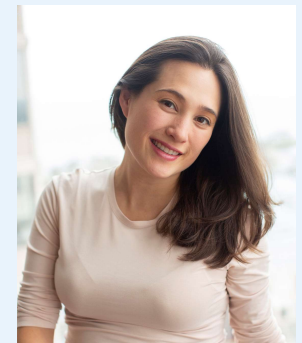
**Troy  
DuMoulin**

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



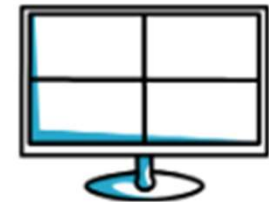
Operations



Anna Thomas



Business Operations

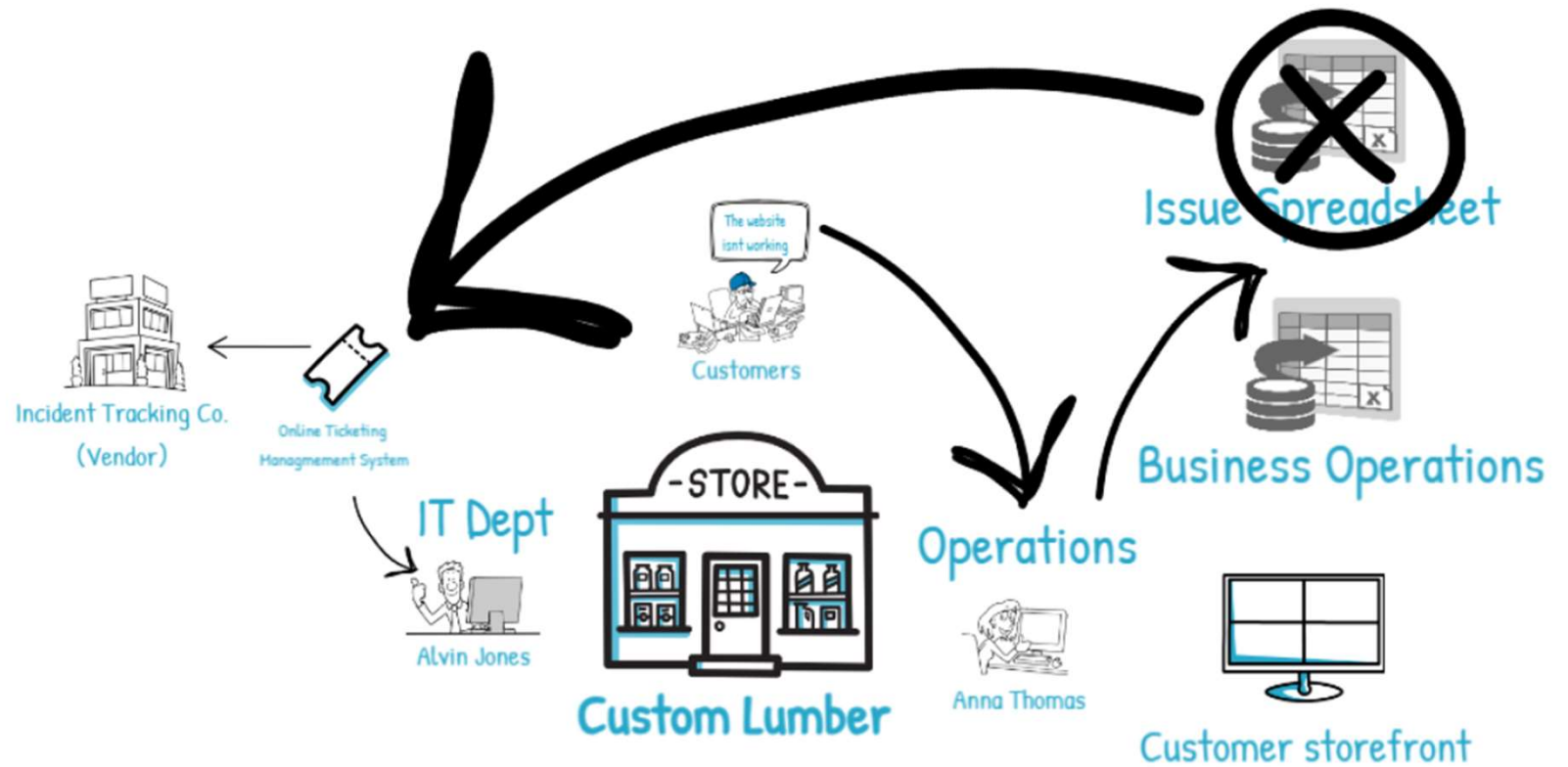


Customer storefront

## Third month

Total Employees: 12

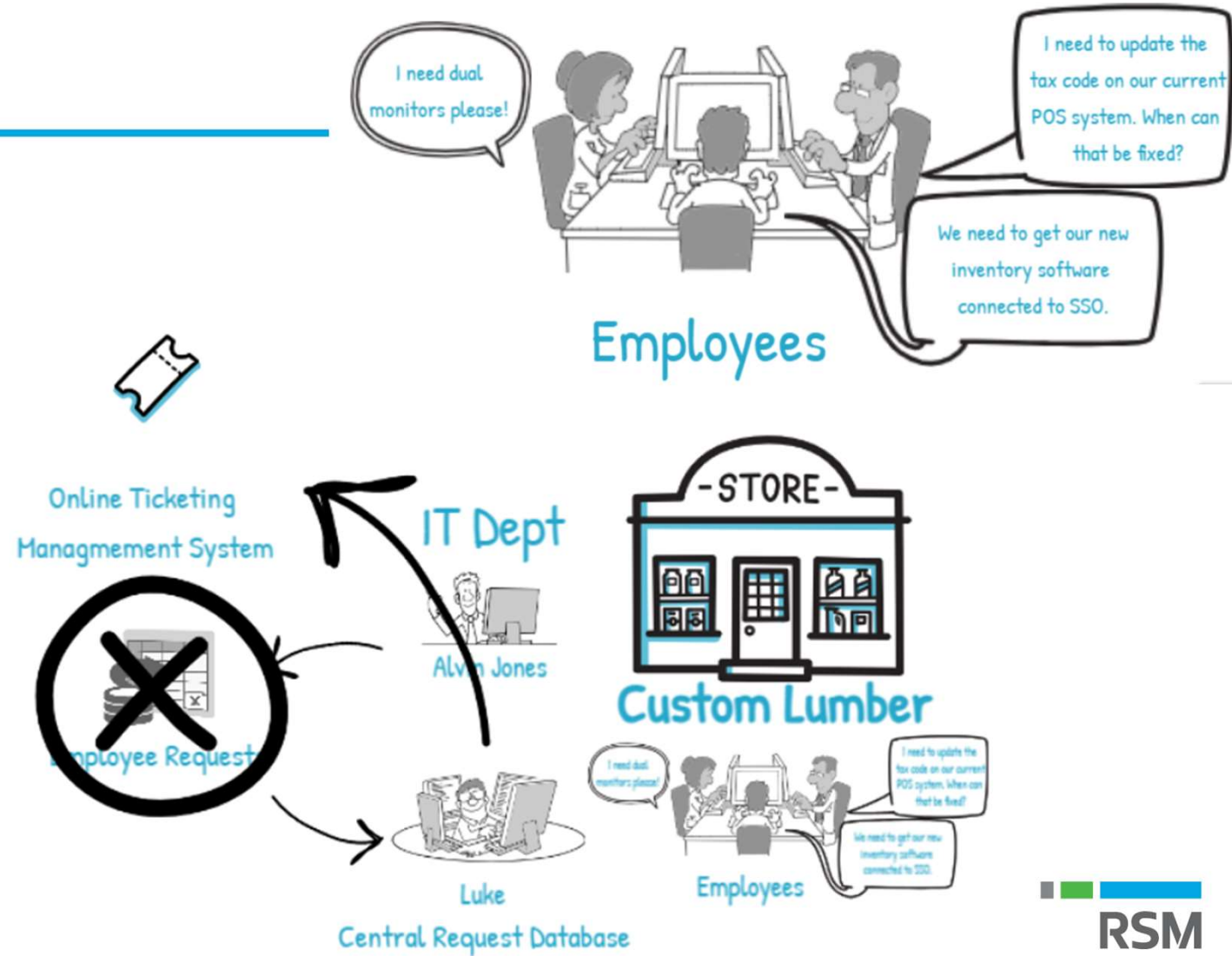
IT Dept: 1



# Sixth month

Total Employees: 18

IT Dept: 4

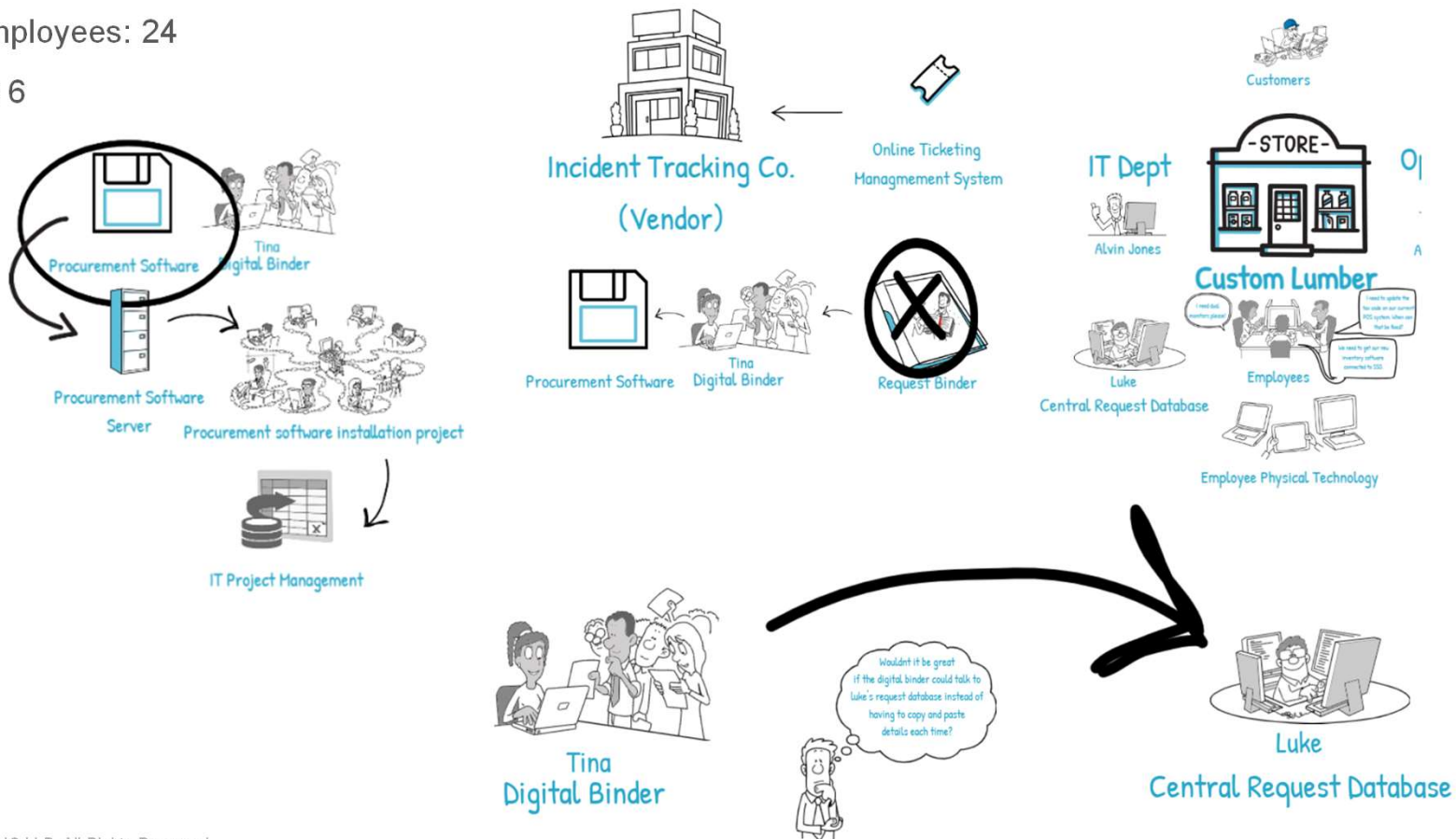




# Year one

Total Employees: 24

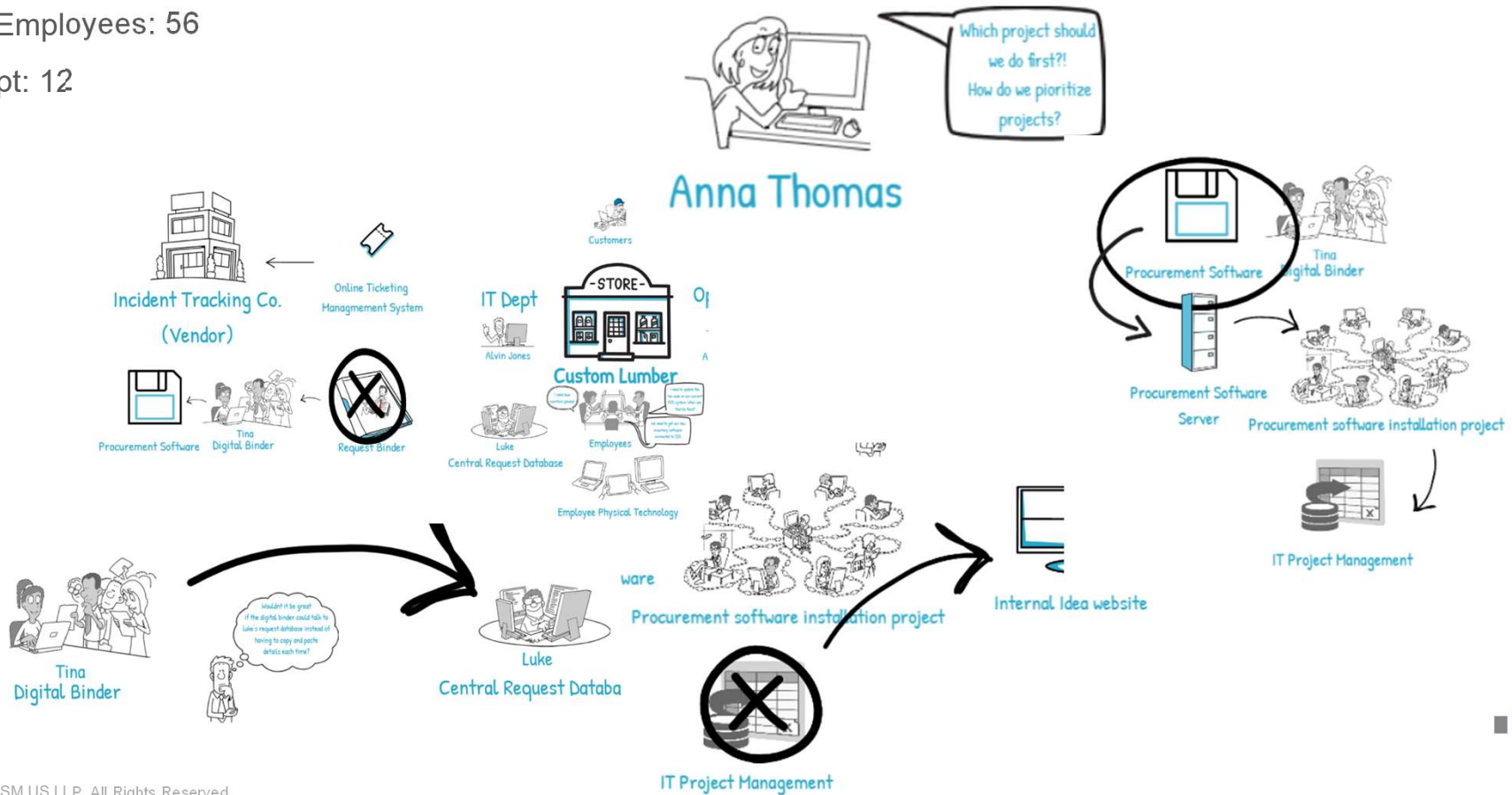
IT Dept: 6



# Year two

Total Employees: 56

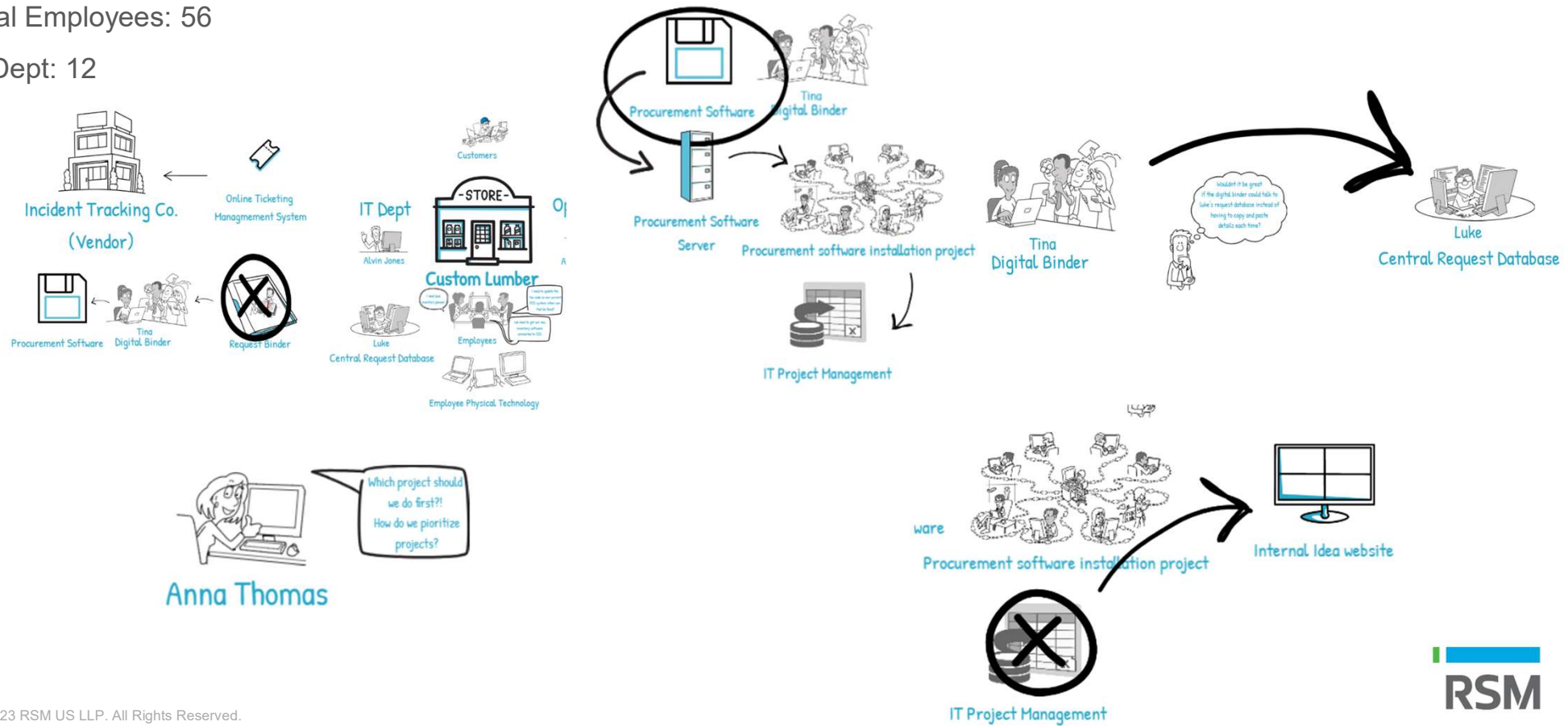
IT Dept: 12



# Year three

Total Employees: 56

IT Dept: 12



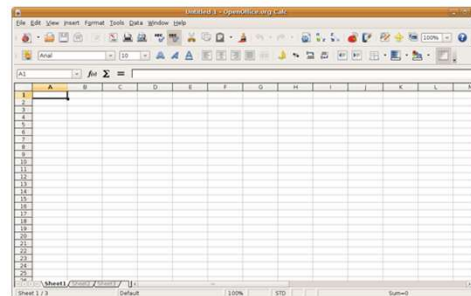
## The service desk – Early stages

A functional unit responsible for dealing with a variety of service activities  
Handles: Incidents, requests, knowledge, queries, problems, complaints, scheduling.....

**Friendly, empathetic soul**



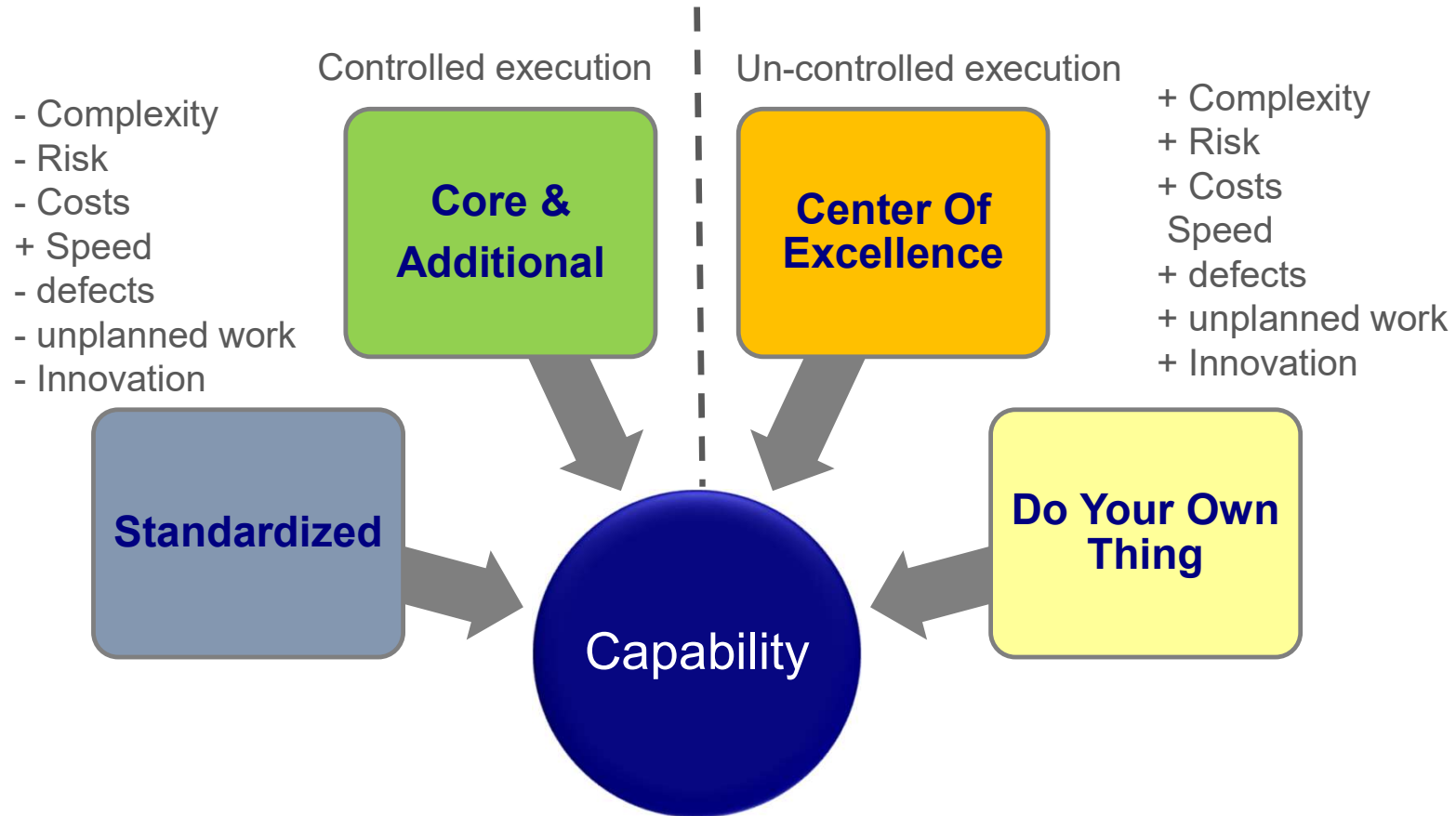
**Basic tracking**



**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



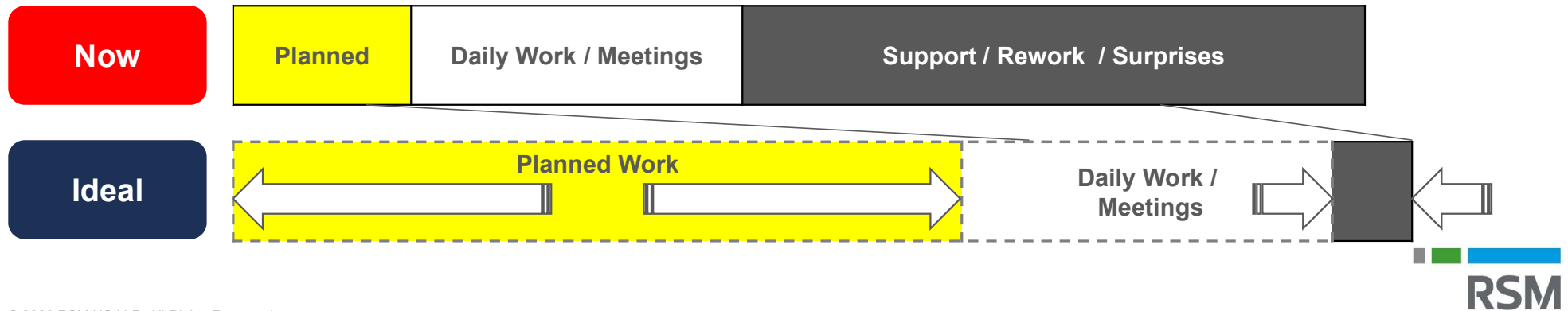
**MUDA**

**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



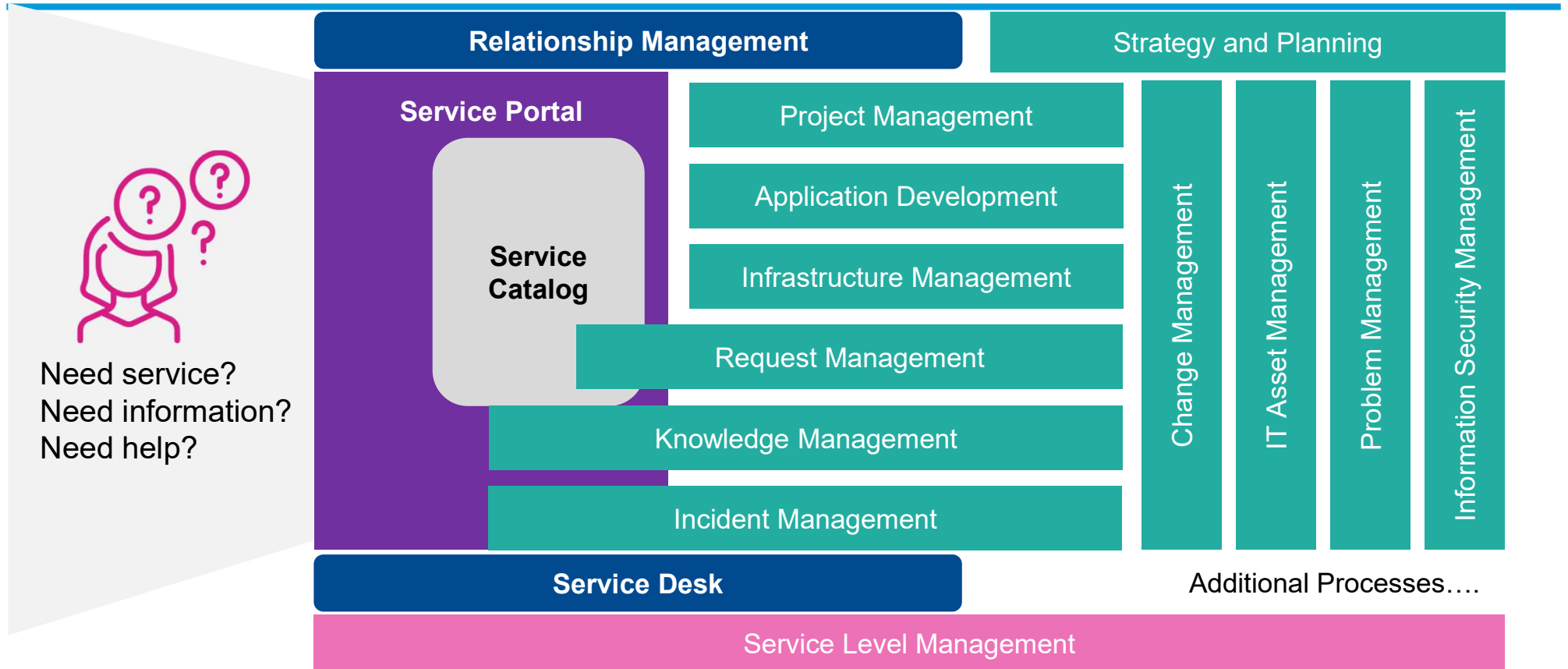
- **Incident management** - Fix something that is broken
- **Request management** - I need.... by this date...
- **Knowledge management** - How do I...?
- **Change management** - When you make changes to key IT systems, please don't break other things
- **Portfolio & project management** - Help me to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

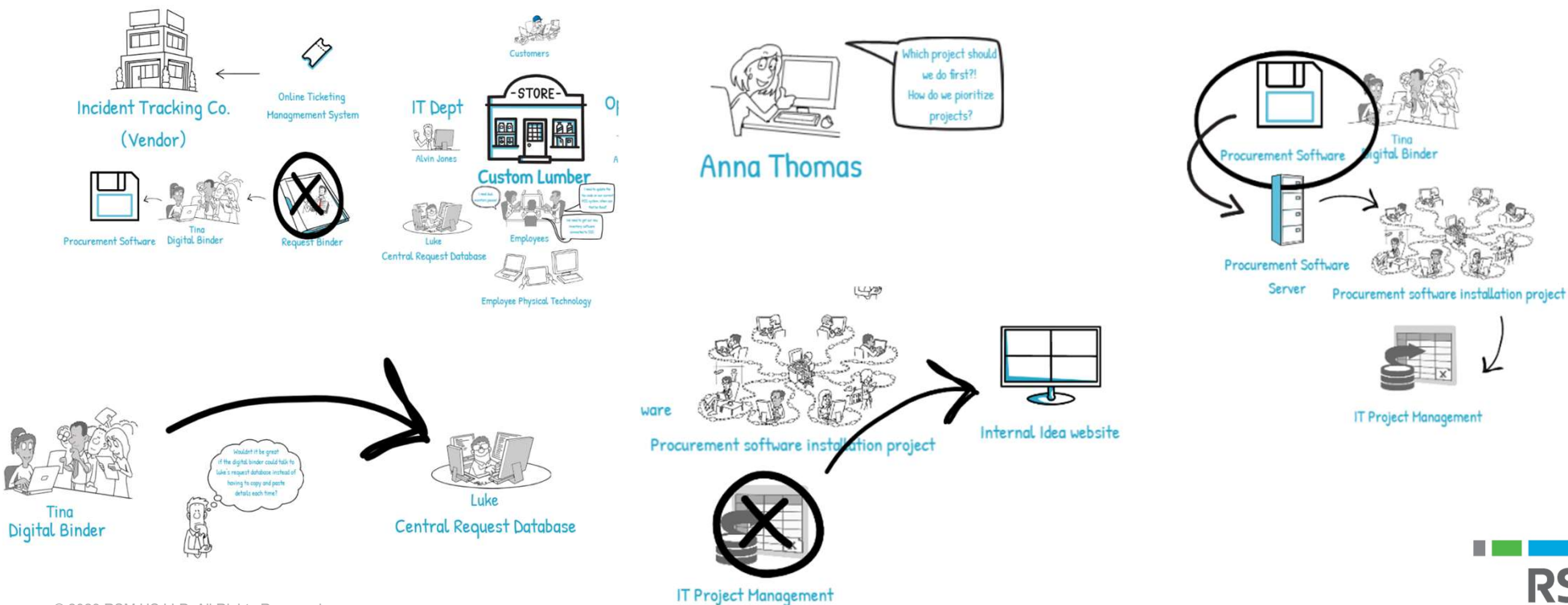
# Service portal automation and ITSM process integration



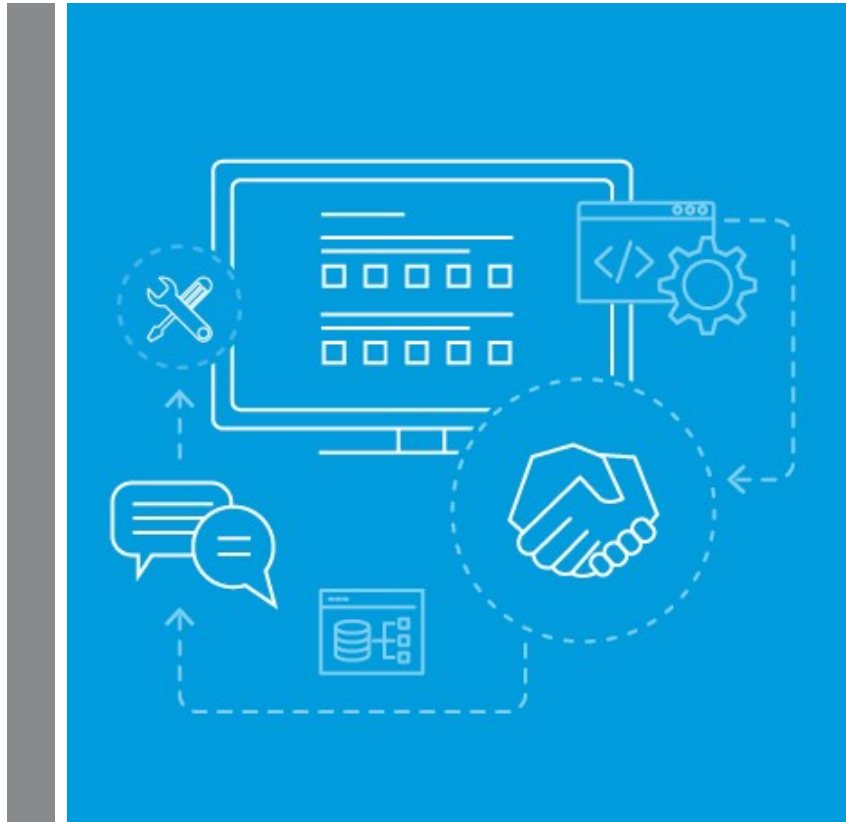
# Year three

Total Employees: 56

IT Dept: 12



# RSM WorkHub



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

Specifically designed for middle market companies

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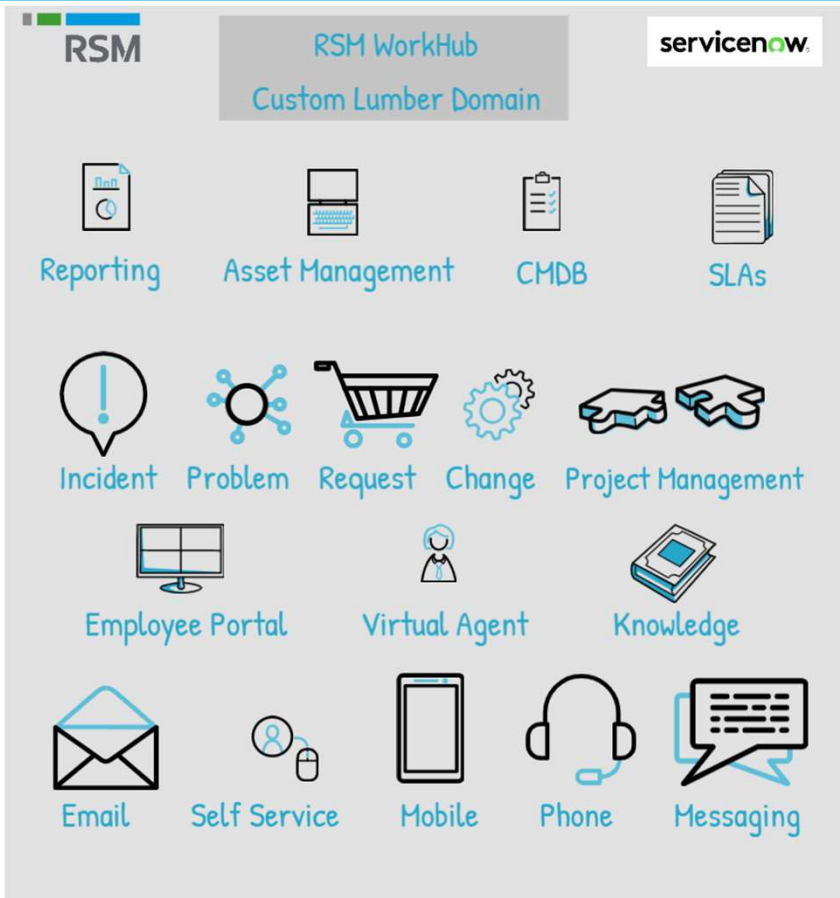
RSM owns, manages and supports WorkHub

- 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

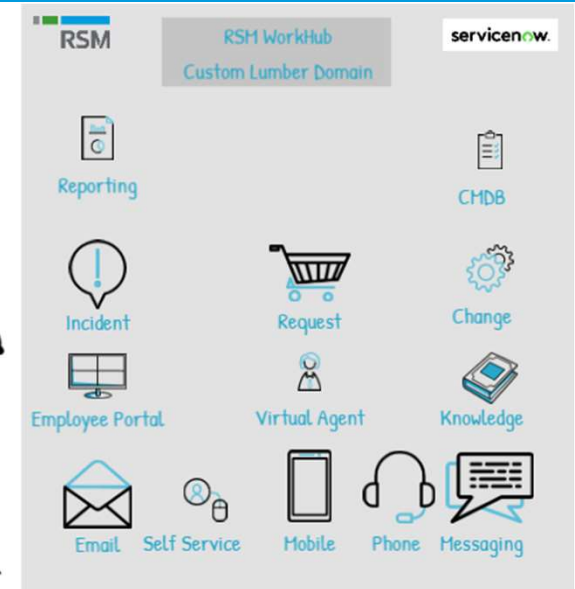
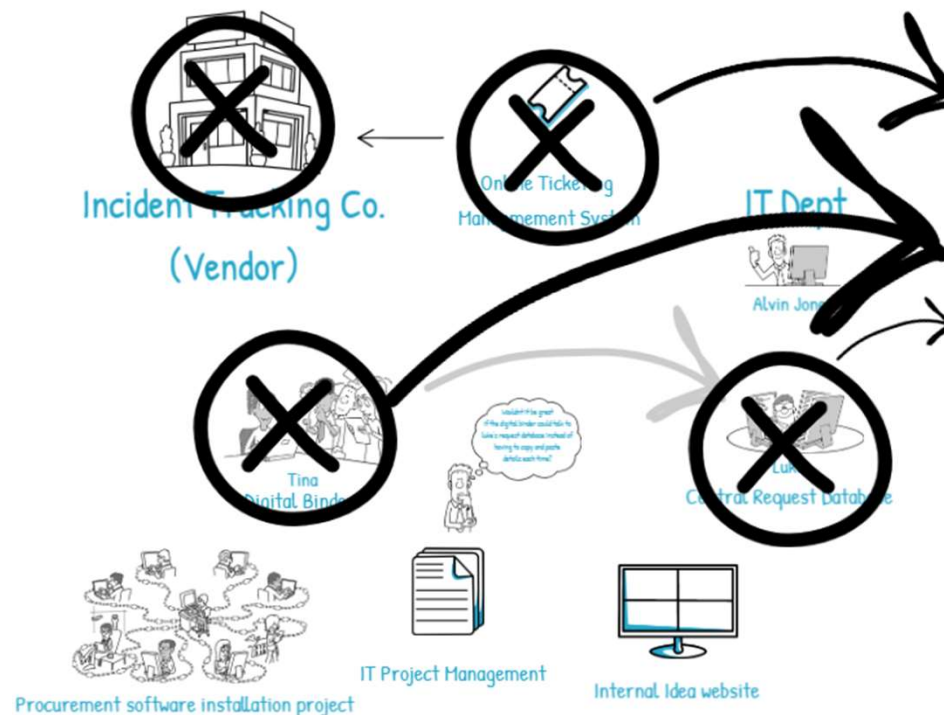
# RSM WorkHub capabilities



- 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

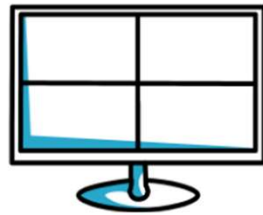
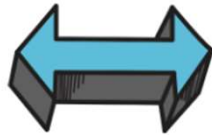




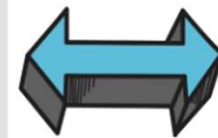
## Year four end state



Employees  
End users

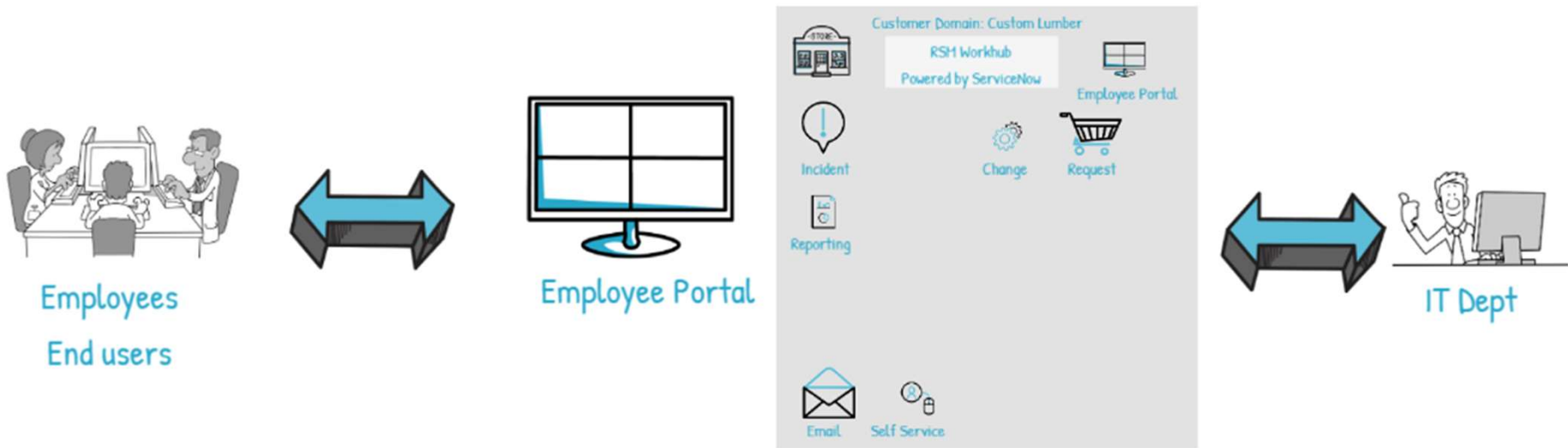


Employee Portal




IT Dept

# WorkHub interaction with employees



# THE POWER OF BEING UNDERSTOOD



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