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SERVICE DESK

The Benefits of Business Rules Automation in ITSM

Introduction

In recent briefing papers produced by Simplisys, we demonstrated the importance of effective IT Knowledge Management in larger organisations through three main areas:

- Increased efficiency through dynamic presentation of relevant knowledge
- Reduced costs through empowering service agents to resolve more incidents in the first call
- Increased customer satisfaction through the resolution of incidents quickly and effectively

Another important element of reducing cost, increasing efficiency and improving process adherence is the automation of Business Processes and procedures. Every organisation has a set of policies derived from both industry and company legal regulations as well as from internal and external standards and internal operational procedures. These policies affect the activity of all employees and therefore must be enforced across all departments. Historically 'Business Process Automation' was the preserve of large Enterprises that had big enough budgets to afford to pay for expensive consultants and software to deliver the automation across the Enterprise. That is no longer the case especially when it comes to Case Management, 'Business Process Automation' is now available within workgroups and smaller teams.

These days it is key for effective Incident or Case Management software to include a flexible Business Rules capability where system administrators can easily create and maintain rules that automate and enforce the adoption of company policy. Incident Management solutions that support Business process automation provide invaluable support to underpinning the rules of engagement between your internal and external customers and your service agents, thus ensuring that incidents are processed in full adherence to company policy.

For Service Desk analysts to be most productive they need to concentrate on delivering excellent customer service rather than having to remember to follow up every incident, close calls that have been resolved for some days or escalating to team leaders and managers calls that are close to SLA breach.

On a busy Service Desk workload and simple human error results in reduced customer service as well as lapses in adherence to business processes.

As most departmental managers are nowadays required to deliver better results and drive customer satisfaction whilst driving down costs and resource usage we see 'Business Rules Automation' as a key component of any ITSM solution. We therefore chose to focus this month's briefing paper on the benefits of 'Business Rules Automation' by defining the problems and scenarios where it becomes key to improved performance and presenting some of the solutions that can be implemented through an effective ITSM solution .

The Problem

As a busy IT manager you want to spend your valuable time on the following elements:

- Effective strategic IT planning and oversight of departmental performance.

- Oversee the <u>development</u> and maintenance of the IT strategic plan.

- Evaluate trends within the business and industry as well as horizon scanning for threats and opportunities.

- Approve and monitor major projects, IT budgets, priorities, standards, procedures, and overall IT performance.

- Review the adequacy and allocation of IT resources in terms of funding, personnel, equipment, and service levels.

To ensure that the department is run effectively you want your team to spend their time covering the following elements:

- Deliver great customer service to your customers.
- Resolve major IT issues for the organisation quickly and efficiently.
- Drive and develop planned IT projects.

To achieve this optimal working practice you need to reduce the amount of time wasted on menial and repetitive tasks that can be automated thereby driving efficiency up and costs down. The valuable time spent by operators on delivering standard communications to end users, manually closing resolved incidents, reviewing and closing "On Hold" Incidents where the end user has failed to respond in X days or escalating up the chain of command can be spent on working on prioritised issues that are part of your IT plan. Of course there are many ways of increasing efficiencies within your IT team like identifying training needs of team members and end users (customers) which a business ready Service Desk Solution must

deliver, however this paper concentrates on delivering efficiency through automation.

Day to day Scenarios

To further illustrate the importance of 'Business Rules Automation' we have chosen a few real time scenarios covering day to day issues which your department will be dealing with:

1. An internal customer calls in with an issue which is relatively simple to deal with and the operator deals with it at first contact. How do they then close the call ensuring the end user is informed and satisfied with the resolution?
2. An internal customer calls back regarding an issue that the operator had already resolved for them in the past. How is the incident dealt with? Do you search for and re-open the original case or create a new one possibly loosing valuable information?
3. An operator is dealing with an incident in a way which affects the department's SLA. How do you ensure managers are alerted of a pending breech of SLA?
4. An Incident is logged affecting key issues such as systems operation or information security. Policy dictates that Management must be alerted, how do you enforce this policy?

If you are currently using manual processes, relying on your operators' judgment and efficiency to solve all or some of these issues, or need to minimise the risk of human error, you will benefit from automating your business processes.

The Solution

Modern ITSM Solutions such as Simplisys Service Desk are highly configurable and can be tailored to underpin business processes by the creation of business rules automation that both increases the efficiency of your team and improves adherence to business processes. Moreover Simplisys Service Desk is fast to deploy, configure, implement and adopt delivering market leading return on investment and total cost of ownership. More specifically automatically solving everyday issues caused by the need to underpin working processes can deliver the following benefits to your department:

- Consistency of operation across the team
- Pro-active management of the process and its adaptation
- Improved efficiency and time saving
- Reduced errors and reliance on personal judgments

Modern service management systems are designed to help operators' close calls as quickly as possible. Operators are busy enough trying to deliver excellent customer service without the need to ensure manual follow up of company rules. Functions such as closing resolved calls, alerting managers of possible breaches of SLA or potential Security breaches can and should be automated. Simplisys Service Desk delivers this using state of the art Business Rules engine. In keeping with our "Simply Smart" approach to ITSM, our system stands out in its ability to offer:

- Utilising intuitive management tools to enable System Admins to add, modify or delete rules as and when required without going on extensive training courses. No programming required.

- A Business rules engine that is designed to implement and underpin your business processes rather than force you to change them to fit.

- Respond quickly and easily to changing business needs.

Customer interface demonstration

To further demonstrate the usability of Simplisys Help Desk we have included a number of screen shots showing the business rule creation process. The particular example shown takes you through the steps required to set up an automated process (Business Rule) to automatically close all issues in the resolved state where the customer has failed to respond within a time period, in this case 14 days:
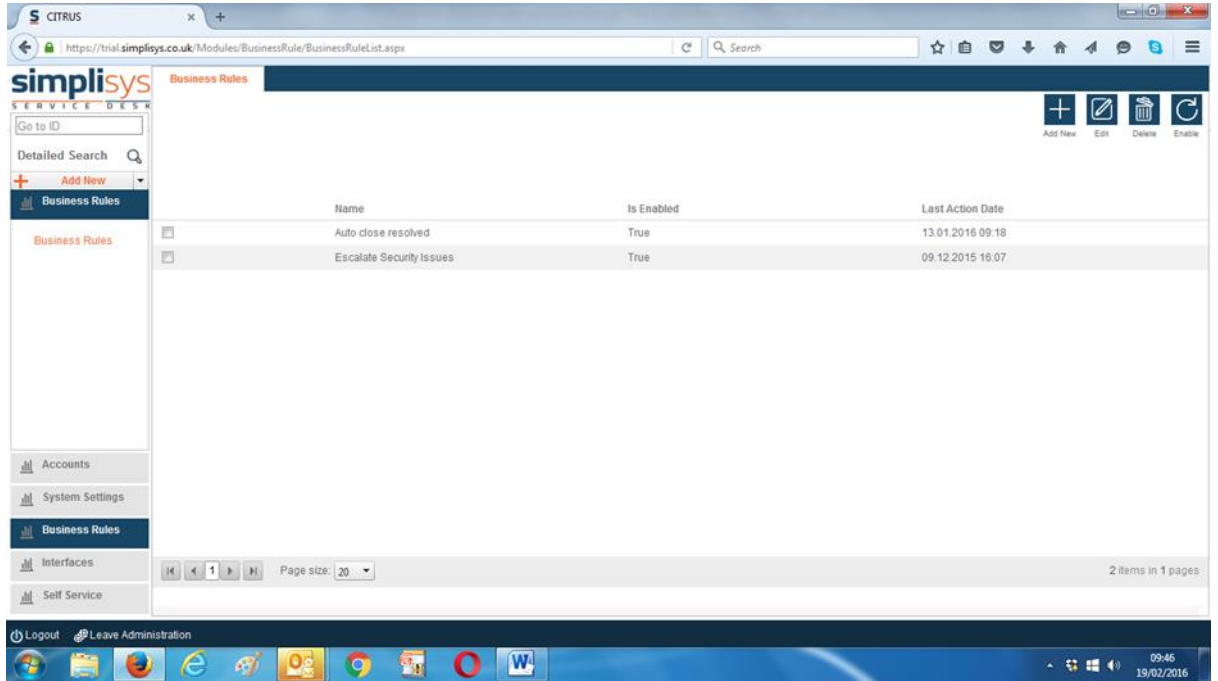
Figure 1. Go to Administration area to view list of Business Rules.
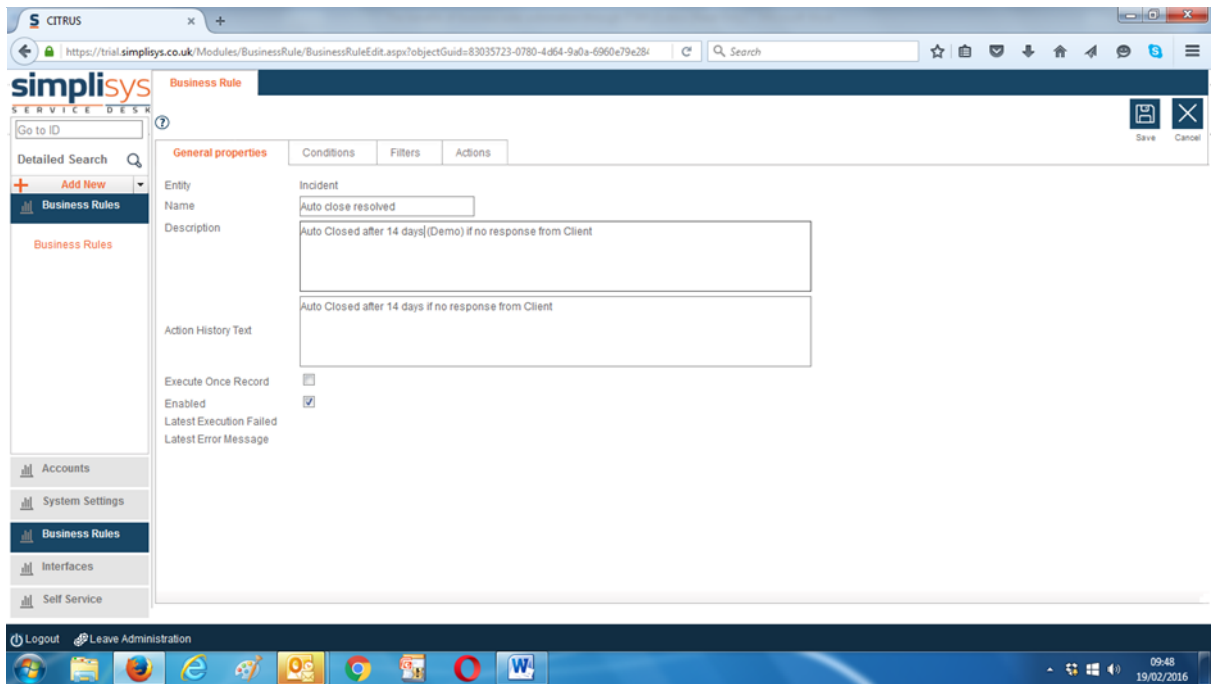

Figure 2. Give the rule a name and add text to go in the Incident History when rule is triggered.
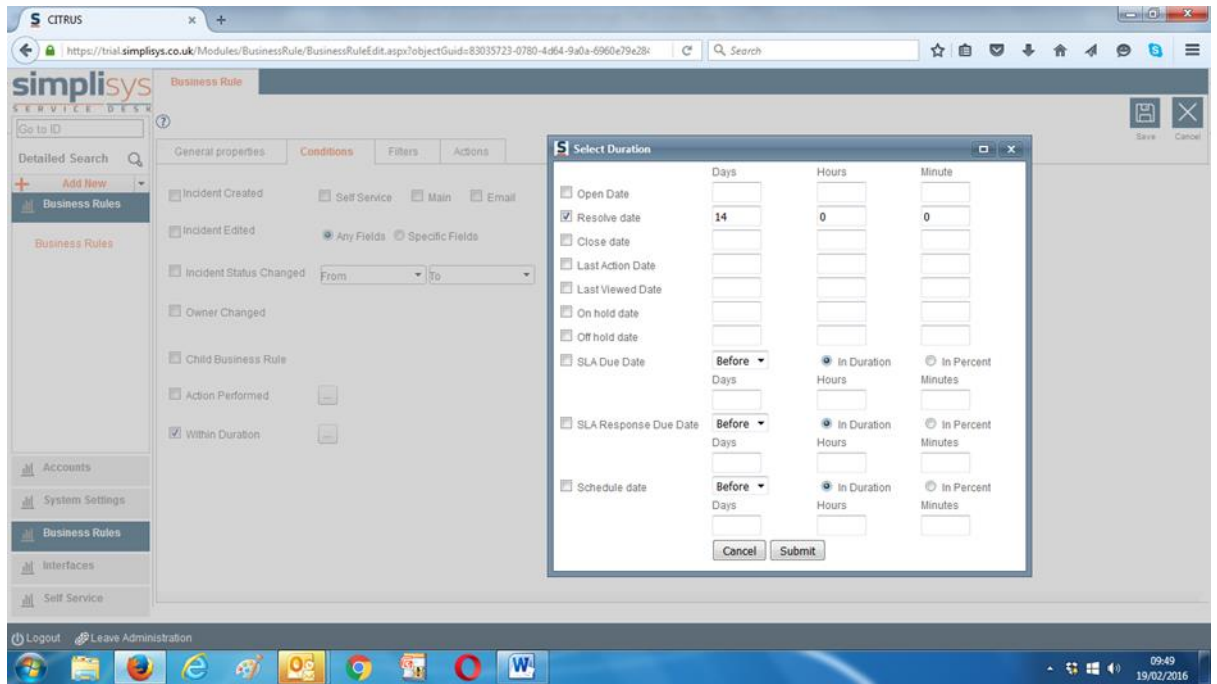
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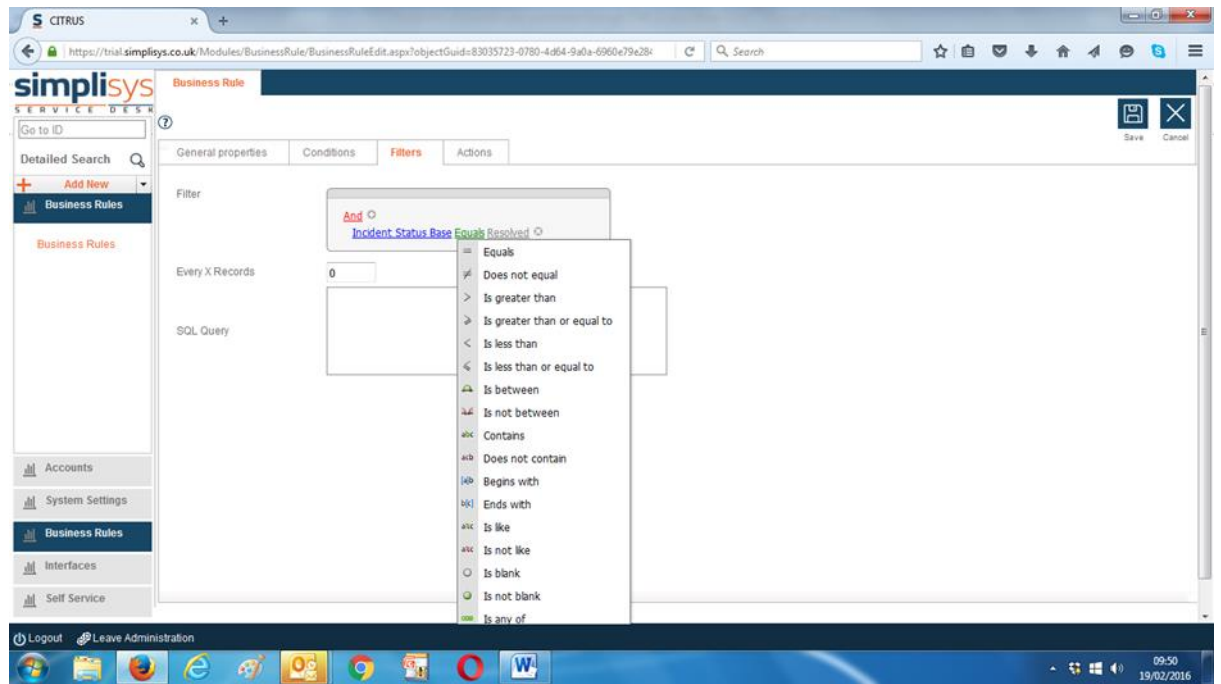*Figure 3. Set the condition, in this case Within Duration.*

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Figure 4. Apply a filter if required using Boolean logic
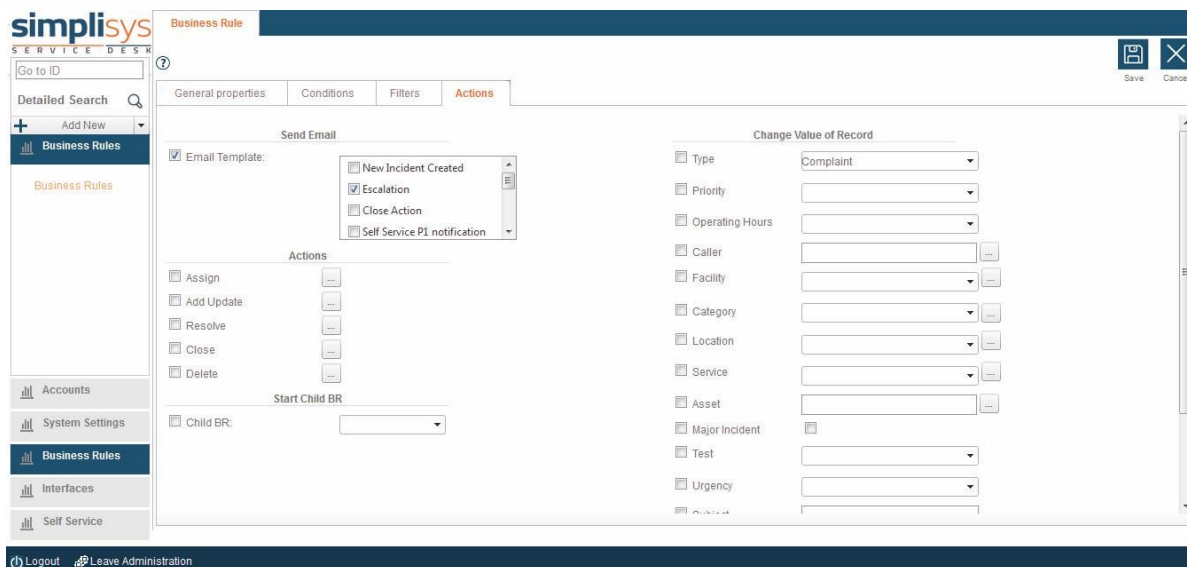
Figure 5. Determine the action required, in this case Close then Save the rule.

About Simplisys

Simplisys Limited is the developer of Simplisys Service Desk (formally known as Citrus Service Desk). When we designed Simplisys Service Desk our objective was to quite simply create the ultimate service desk application for use in the real world – a rich feature list, configuration not customisation at its core, fast implementation out of the box, integration with your workflows and business rules, following ITIL best practice and a price point that makes it accessible to most organisations.

Simplisys Service Desk is designed developed, installed or hosted, and supported by our team at Simplisys Ltd. With our head office in Portishead, Bristol, Simplisys Ltd is an ISO 9001 registered company and delivers solutions to industry best practice quality standards. Our approach to implementation is to work closely with our customers, understanding requirements and reasons for change and ensuring that projects exceed expectations.

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