

## Your 7-Point Checklist for Better ITSM Tool Selection

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Selecting a new, better-fitting, IT service management (ITSM) tool can be difficult – from understanding and agreeing what’s really important (to your organization) in your selection criteria, through to eventually choosing the right tool and vendor.

The effective use of industry research and good practice will help though. For instance, recognizing that two simple conclusions can be made from freely-available industry research on modern ITSM tool wants and needs:

1. Traditional ITSM capabilities are still important (and it would be surprising if they weren’t).
2. People are now looking for key attributes (in, or with, ITSM tools) such as – ease of use, automation, self-service that employees want to use, ease of configuration and customization, and the ability to access the tool (and its capabilities) from any location and using any device.

Plus, importantly, that it’s no longer just about the technology, i.e. the ITSM tool’s features and functions, it’s also about the end-user or customer experience – something that should be thought of as a constant theme running through the recommended 7-point ITSM-tool selection checklist that follows.

# Recommended 7-Point ITSM-Tool Selection Checklist

This report covers seven recommended ITSM-tool selection checklist points:

- 1 ITSM process enablement
- 2 Usability
- 3 Self-service
- 4 Business intelligence (BI) and reporting
- 5 Automation
- 6 Configuration, customization, and integrations
- 7 Vendor relationship and (lack of) communication  
With five key tips included for each of these seven points.

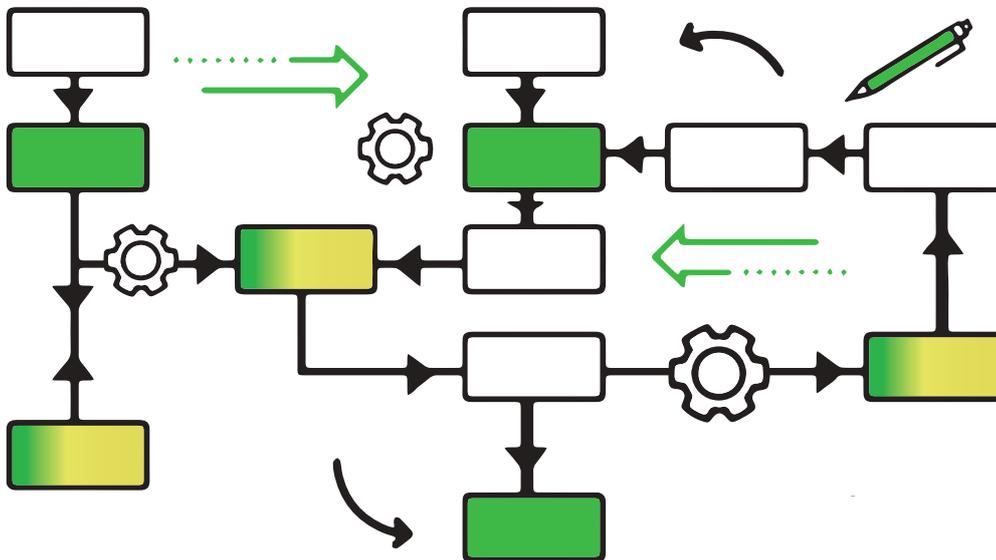
I've included five key tips for each of these seven points.



## Point 1 ITSM Process Enablement

This is the tool's ability to support all required aspects of current and future ITSM operations; something that will of course vary in breadth and depth across different organizations.

The following 5 tips will help you to ensure that your chosen tool is able to meet your organization's real business and operational ITSM needs:



## ITSM Process Enablement

### 1. Agree on the real reason(s) for wanting to change your ITSM tool (and vendor).

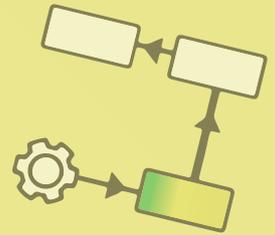
Understand the true root cause(s) of the need to change your ITSM tool. This might not necessarily be that the current tool is lacking capabilities, or is suboptimal in some process or management/governance areas. Instead, it might never have been the best option for the procuring organization – perhaps the wrong questions were asked during the previous tool-selection process. Your organization then received the wrong answers, and thus made the wrong investment decision.

## 2. Know what you're trying to achieve with ITSM (and the new tool).

This is crucial because there's a real danger that any organization seeking a new tool is overly-focused on ITSM or ITIL processes, and the features and functions that support them. These organizations are ultimately more focused on what they need to "do" – the mechanics of ITSM – than what they need to achieve by "doing" ITSM. Thus, as part of investing in a new ITSM tool (and vendor) it's important to know why a new ITSM tool is needed and how it will ultimately benefit your organization. This understanding of desired business outcomes will also help to reinforce that ITSM and the ITSM tool are merely "the means to an end" rather than the "end" itself, and will help to identify the opportunities and pain points that your organization ultimately needs to address.

## 3. Understand your organization's true ITSM tool requirements.

Your organization will most likely follow one of two tool-selection routes (or use both): participating in a, usually 30-day, free trial of various ITSM tools and/or issuing an RFP for a selection of ITSM tool vendors to rate themselves against your needs. Either way, it will hopefully help you to get a good understanding as to how well each ITSM tool and vendor meets your needs. However, organizations need to start with their desired business outcomes rather than the commonly-used features and functions available in ITSM technology. So, ensure that you know your organization's true requirements – requirements that are based on business-outcome-based needs, not the art of the ITSM-tool possible.



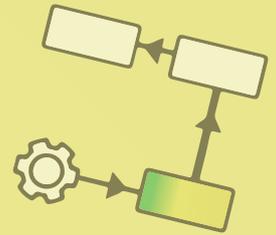
## ITSM Process Enablement

#### 4. Know the common ITSM tool/vendor differentiators.

While most ITSM tools have been created with ITIL as a blueprint, they're all different in some way. These differences can relate to a number of things, for instance: the target market, such as company size and industry vertical; the breadth of ITSM capabilities – in terms of the ITSM processes supported; the depth of ITSM capabilities – for example, does the ITSM tool cater for a lot of ITSM processes in a “shallow” way or a limited number of processes in a “deeper” way? Plus, there's the focus of future product improvement and innovation – and whether new releases are focused on customer wants and needs, industry trends, or both. Or even the relationships the vendor has with its customers and the wider ITSM community – there's more on this later.

#### 5. Understand how business and IT strategies will impact tool-selection decision making.

ITSM isn't an island; and thus, new ITSM tool and vendor decisions can't be made in isolation. Instead, an understanding of third-party requirements and compromise might be needed, for instance accommodating: a corporate cloud-first strategy; an enterprise service management strategy – this is where ITSM thinking, best practices, and technology are used to improve the performance and outcomes of other corporate service providers such as HR and facilities; or a service integration and management (SIAM) approach to IT service delivery and support – this is where the customer organization is using multiple service providers working together to meet the organization's IT service delivery and support needs.

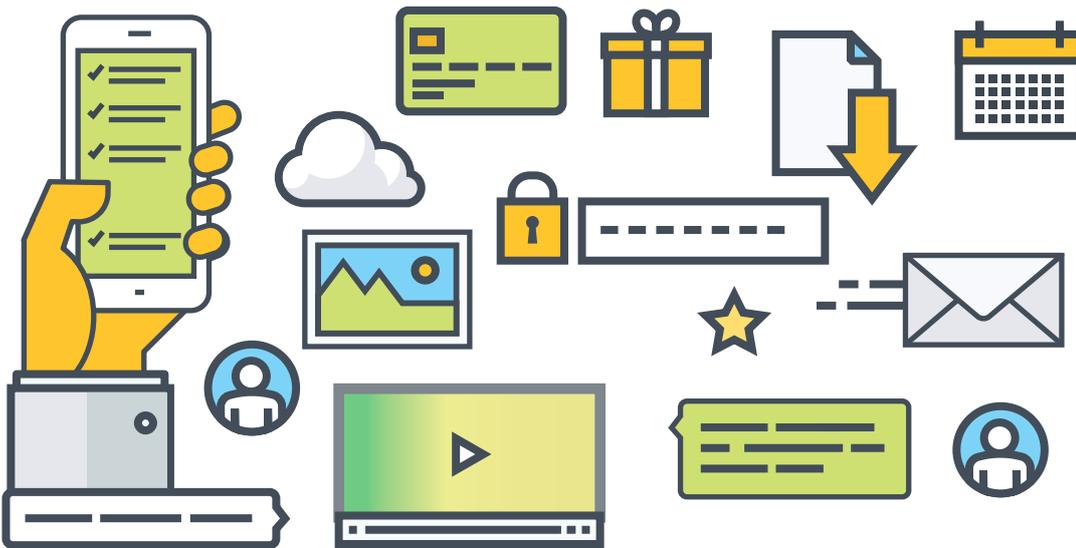


**ITSM  
Process  
Enablement**

## Point 2 Usability

Usability is increasingly important in the context of consumerization. As employees, no matter their business role, expect more from enterprise software. Ultimately, if software or services are hard to use, they'll find ways of not using it in favor of other options.

The following 5 tips will help you to ensure that your chosen tool meets the usability requirements of both IT staff and end users, especially in matching consumer-world services.



### 1. Know what employees think about the current ITSM tool (and vendor).

Importantly, this is both IT and end users. And this shouldn't just be a list of what's wrong with the current ITSM tool. Instead, it should be "the good, the bad, and the ugly." So, know what works well for users. And when things are disliked, it's important to understand why – i.e. go beyond the symptoms to understand the root cause(s).



## Usability

## 2. Access and consume IT industry research into ITSM tool satisfaction and dissatisfaction.

This might be from Tier 1 analyst firms such as Gartner and Forrester. It might be from IT support industry bodies such as the Service Desk Institute (SDI) and HDI. Or it might be the current growth in crowdsourced technology-rating websites that look at customer feedback. Be careful with these though – remember that this analysis and feedback might be from organizations that are totally different to your own.

## 3. Recognize the difference between the user interface (UI) and user experience (UX).

Self-service is a great example of this. If end users find self-service capabilities intuitive and easy to use (the UX), then they'll use them again. If not, they won't. Thus, self-service delivery projects (in this example) need to understand that new self-service technology alone, even with a sexy UI, isn't always the answer. What's more important to success is how the end user uses and experiences the technology – the UX or customer experience (CX).



**Usability**

#### 4. Design and deliver capabilities with the “customer” at the heart. ❤️

Hopefully you’ll agree that an important aspect of ITSM software, or in fact any piece of enterprise software, in 2018 is usability. In particular, ease-of-use in light of consumer-world applications, where personal technology is now so intuitive and frictionless to use that when it isn’t it gets swapped for something that is. Employees now expect to receive a similar level of usability at work to what they get outside of work – it’s the aforementioned consumerization in action. Thus, failing to design and deliver ITSM capabilities around the people who use it is going to result in something that doesn’t get used as much as it should be.

#### 5. Never stop improving (and remember that demands and expectations will change).

This might seem like a throwaway line, but hopefully people now appreciate that what was acceptable (or even great) last year might have already been superseded by something new and better. Whether you want to take a formal continual service improvement (CSI) approach to ITSM tool usability, or something less formal, it’s important not to stand still as employee expectations change around it.



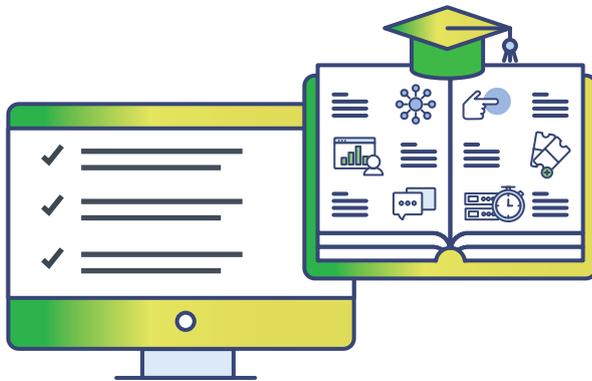
**Usability**



## Point **3** Self-Service

As IT departments continue to be under pressure to deliver more with less, self-service offers up the ability to not only reduce costs but also to speed up service and resolutions and to improve the end-user experience.

The following 5 tips will help your organization to ensure that your chosen tool provides a self-service capability that employees want to, and do, use.



### 1. Recognize that IT self-service isn't easy.

This SDI quote supports the statement: *“The increase in the adoption of self-service tools is undoubtedly due to the range of associated benefits that comes with the implementation of such a solution, most commonly reduced support costs, increased customer satisfaction, and a round-the-clock support channel. However, the number of organizations that have realized these benefits and have achieved the anticipated return on investment (ROI) are few, less than 12% according to recent SDI research<sup>1</sup>.”* One of the key reasons, demonstrated by Happy Signals data<sup>2</sup>, is that IT self-service is failing employees when it comes to end-user experience. It's currently the second least-loved of IT support access and communication channels, having only recently just surpassed email.

1. SDI, “Realizing ROI from Self-Service Technologies” (2017)

2. Happy Signals, <http://benchmark.happysignals.com/benchmarks>



## Self-Service

## 2. Understand and learn from the mistakes of other organizations.

There are so many potential pitfalls to avoid, from solely focusing on cost reduction; treating self-service as a technology project; not involving the people who will need to use the self-service capabilities; failing to invest in organizational change management techniques (to facilitate what will be a change in the way of working); to underinvesting in knowledge management and self-help capabilities.

## 3. Build self-service capabilities around “the customer” not IT.

It’s so, so important to make self-service about service users not the service provider. Ultimately, if employees don’t like your self-service capabilities, then they won’t use them – and the anticipated ROI will never be achieved.

## 4. Exploit automation wherever possible.

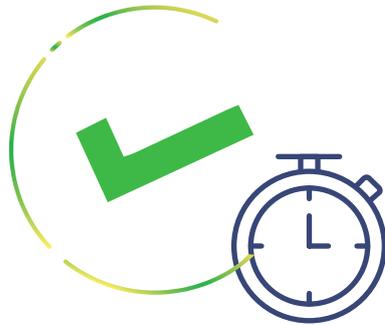
Many of the big-ticket IT self-service benefits are tied into the use of automation. For example, delivering a better end-user experience, quicker solutions, and cost reductions. Self-service initiatives should ideally be piggybacking any existing corporate automation strategies, using existing technologies and skills whenever possible.



## Self-Service

## 5. Still offer choice and recognize that preferences will change over time.

Not only is this keeping your existing telephone, email, chat, and walk-up channels (if used at volume), it's also recognizing that not everyone will want to access self-service capabilities from a PC. There's currently the need to support access from mobile devices, and newer technologies, such as machine learning, offer up the ability to offer self-service capabilities via email – yes, email. There's also newer support mechanisms, such as voice-based interfaces enabled by intelligent, or virtual, personal assistants – such as Alexa and Siri and the technology platforms they reside on. And self-help doesn't always need to be text-based – we're seeing video-based support growing in popularity and the future is predicted to be filled with voice-based interfaces.



**Self-Service**





## BI and Reporting

### 2. Understand the common pitfalls with service desk and ITSM metrics.

For example: having too many metrics; placing too much emphasis on industry benchmarks that might not fit your organization; not understanding the relationships between metrics; measuring things because they're easy to measure, not because they're important; spending more time collecting data than understanding the best way to use it; or using metrics that drive the wrong behaviors and decisions.

### 3. Tie metrics, KPIs, and CSFs to the business rather than IT outcomes.

Ask yourself, how does this metric, KPI, or CSF help our customers and key business stakeholders? Or, more importantly, ask key business stakeholders what your monthly performance reporting is telling them, or even if they bother to read it. You might get a shock.

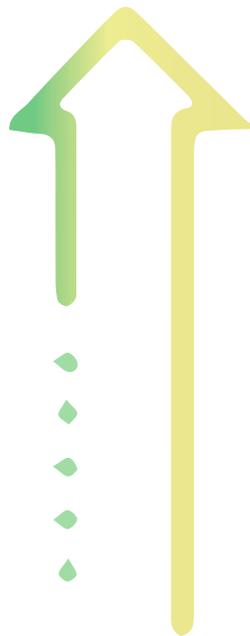
### 4. Appreciate the general and specific benefits of BI capabilities.

The generic BI benefits include: speeding up and improving the quality of decision making; optimizing business processes; increasing operational efficiency and effectiveness – from individuals through to teams and cross-team processes; spotting business issues of various sizes and differing impacts; improving customer relationships; increasing asset use and technology ROI; reducing the risk of non-compliance with regulatory, legal, or contractual requirements; increasing revenues and identifying new market opportunities; and assisting the business in gaining competitive advantage.<sup>4</sup>

4. See: [Business Intelligence -Take an Informed Approach to ITSM](#)

## 5. Use BI and reporting to drive better outcomes.

Following on from BI tips 2 and 3, it's important to ensure that metrics, KPIs, and CSFs are not just a case of beating arbitrary targets, justifying additional IT budget, or “bigging up” IT performance. Instead, these performance indicators all need to be about creating a better IT capability and ultimately a better business.

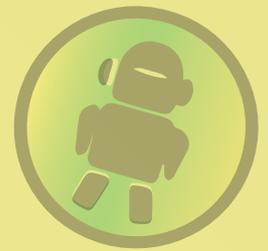


## BI and Reporting

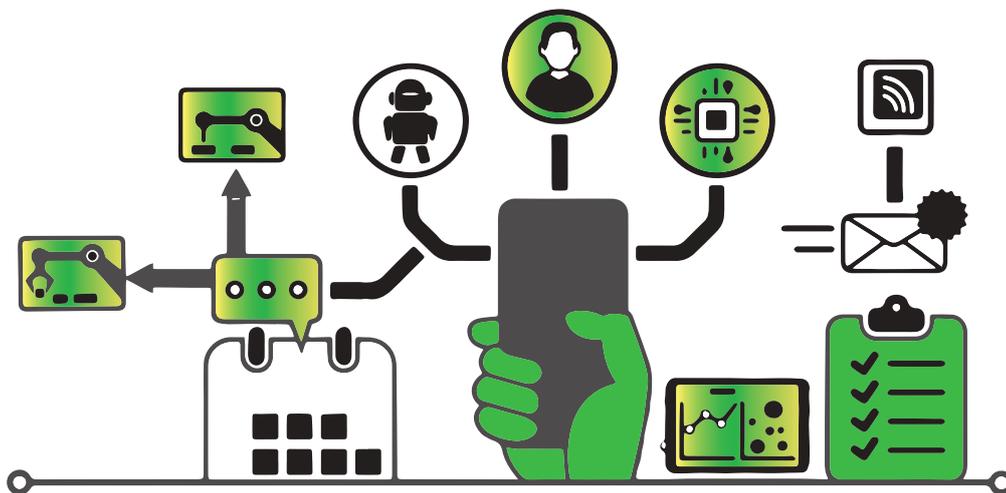
## Point **5** Automation

The exploitation of automated capabilities continues to be a key focus area for IT departments – with 70% of organizations planning to use more in 2017 and beyond.<sup>5</sup>

The following 5 tips will help you to ensure that your organization, in conjunction with the chosen ITSM tool, is able to employ a spectrum of automated capabilities that will bring benefits across all three of “better, faster, cheaper.”



### Automation



#### **1. Realize that automation isn't just about saving money.**

When one considers the available benefits, it's important to look at the whole spectrum. These include: increased speed of execution, improved customer experience, cost reductions, reduced human intervention, reduced “human error,” and increased task or process adaptability – as it's easier to change automation than people who have done the same thing for years.

5. SDI, “A View from the Frontline” (2017)

## **2. Understand that automation isn't about the technology, it's about better business outcomes.**

As with ITSM tool features per se, the use of automation is about better business outcomes. It's not what the technology can do, it's about what can be achieved, at a business level, by the effective use of the employed automation.

## **3. Leverage existing corporate automation strategies and capabilities.**

This was also a tip in the context of IT self-service. Don't waste time and money reinventing the wheel, nor in creating – and paying for – different capabilities that do similar things.

## **4. Use automation for “heavy thinking” not just “heavy lifting.”**

Looking forward, this is exploiting AI in use-case scenarios such as intelligent routing and workflow, demand planning and resource allocation, and many others. AI will bring many advantages to ITSM and IT support, in particular with the technology augmenting existing people capabilities.

## **5. Look to starting specific use-case pilots for AI (including outside IT).**

Don't delay your interest and early investments in AI. Start by closely following consumer-world customer service use cases and their relative levels of success (these are pretty easy to observe in business-to-consumer (B2C) markets). Look to mirror these internally where justified – perhaps working together with customer-service colleagues to offer new AI-enabled capabilities not only to IT but also other lines of business such as HR and facilities through enterprise service management.

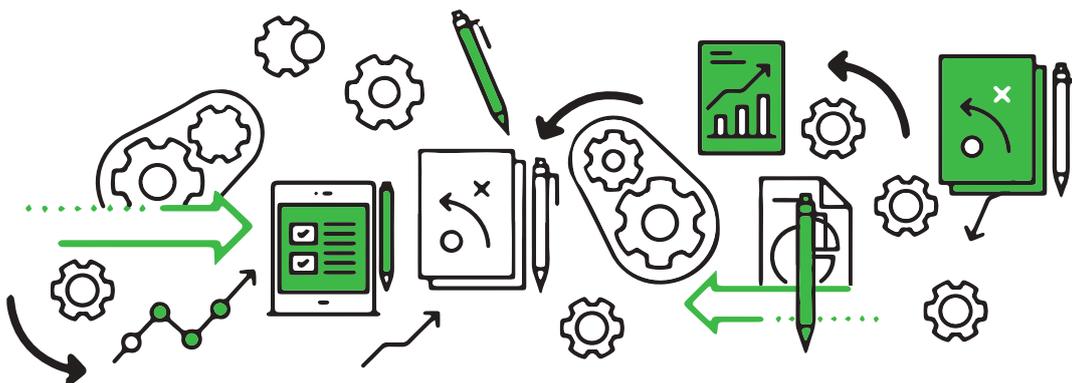


## **Automation**

## Point 6 Configuration, Customization, and Integrations

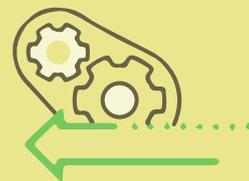
While ITSM tools offer “out-of-the-box” ITIL best practices, there will often be the need to customize or to configure them to your organization’s preferred – or required – ways of working. Plus, in the same way that ITSM is not an island, neither is your ITSM tool and the data and information it holds.

The following five tips will help you to ensure that your organization fully understands the level of interoperability and change required in the chosen ITSM tool to meet agreed business needs.



### 1. Know the differences between ITSM-tool delivery models.

This is a wider area than just this particular checklist point, but it needs to be considered somewhere. There’s on-premises and software-as-a-service (SaaS)/public cloud delivery models, then variants on these such as hybrid and private cloud, and subscription pricing for on-premises. There are numerous pros and cons for each delivery model, but the important ones to consider for this checklist point are the ability to customize (and delivery model limitations), the relative ease of customizations and integrations, and how customizations and integrations fare during tool upgrades. The latter is returned to in tip 5 below.



## Configuration, Customization, and Integrations

## 2. Understand the difference between “clicks” and “code.”

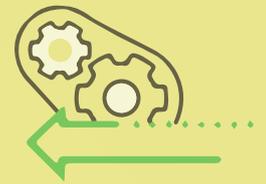
It's common for people to use the terms 'configuration' and 'customization' interchangeably, including in ITSM tool selection, and this is dangerous. Configuration is usually as simple as clicks, and customization is usually code-based. So, nail down the terminology in your internal and external conversations.

## 3. Aim for configuration wherever possible but don't discount the need for customization and integrations in the tool selection process.

Configuration is easier to do and, as tip 5 below outlines, customization can create future issues. But will your organization always be able to survive purely with configuration? If it has with previous ITSM tools, then maybe you will be okay but, if it hasn't, then at least understand a new tool's customization capabilities even if you expect to never use them – you just might need to though. The same is true for integration capabilities, although there's far more of a chance that your organization will benefit from multiple integrations to other IT and business systems.

## 4. Test the ease of configuration, customization, and integrations using real use-case scenarios.

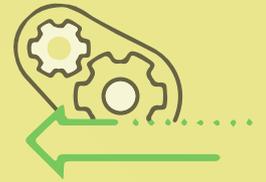
Watching someone who's experienced with a particular tool demo an example that's easier than your organization's required, real-world, use-case scenarios might be interesting but it's not necessarily a true picture of what can and can't be done. Take enterprise resource planning (ERP) or end-point management (EPM) systems as examples – these might be completely different beasts to the examples demoed as part of the selection process.



## Configuration, Customization, and Integrations

## 5. Understand the impact of customization and integrations on future tool upgrades/versions.

It's critical, especially as cloud-based ITSM tools are changing far more frequently than their on-premises equivalents, that the ability to benefit from new releases isn't held back by anything that has been introduced to the mix by your organization (customizations and bespoke integrations). Thus, don't just look at what can be done now, also look forward to how vendor changes will impact your needed changes and integrations – plus, of course, the effort and costs involved in keeping your new ITSM tool as you need it to be over time.



**Configuration,  
Customization,  
and Integrations**

## Point **7** Vendor Relationship and (Lack of) Communication

Relationships with partners and suppliers is becoming increasingly important in an increasingly services-based business world. From getting fit-for-purpose support, to ensuring that products and services live up to both current and future organizational needs.

The following 5 tips will help your organization to ensure that the chosen ITSM tool vendor is able to meet its expectations of a high-value customer-supplier relationship.



### **1. Know the ITSM-tool vendor landscape and which vendors suit different customer types**

But you don't need to know as much as an industry analyst. There are hundreds of IT help desk and ITSM tools on the market and it's helpful to know about possible tools and vendors long before your organization is at the point of new-tool investment. Because, once they're in your subconscious, you'll be more likely to pick up on "mentions" of them – be it in their own content or that of others. Thus, allowing you to get an appreciation of what they offer and how well they're doing – especially for organizations similar to your own – over time rather than just at the point of needing a new ITSM tool.



## Vendor Relationship and (Lack of) Communication

## 2. Understand what your wants and needs from a vendor relationship perspective are.

This is what your organization expects from the supplier or service provider, which is hopefully much more than a one-time exchange of money for software/service followed by annual contacts for renewals and upsells. Look to create a relationship, with proactive communication mechanisms, such that the vendor is proactively assisting your successes with their ITSM tool. After all, this benefits them as much as you, and makes it easier for them to land those renewals and upsells.

## 3. Know the IT industry research into ITSM tool vendor satisfaction and dissatisfaction.

Many sources are free and others that are behind paywalls. Plus, as already mentioned, there's the growing prevalence of crowd-sourced tool-review websites. A second word of warning here though – while such websites contain valuable insight into customer experiences, there's also a need to understand how they work and when they don't. In particular, if they're being "played" in terms of enticing happy customers to post reviews and, more worryingly, any conclusions drawn by the websites that don't really stand up if one looks at how things – such as reported market share – are established. It can be flakey, and dangerous, to the uninformed site user.



## Vendor Relationship and (Lack of) Communication

**4. Use Google or similar, and social network sites, to better understand what other customers are saying (about both ITSM tools and vendors).**

It's a simple, and cheap, exercise to undertake but, as with crowd-sourced information, it's important to understand that not everything you'll read is a true reflection of a particular tool or vendor. What it does do though, as a minimum, is allow your organization to create a list of difficult questions to ask each vendor under consideration.

**5. Agree on the organizational value of the vendor relationship (along with other business)**

Is finding a vendor you can work with super important to you? Consultant and ITIL author Stuart Rance offers this sage advice to clients when selecting a new tool: "*Select a vendor you think you can work with.*" The quality and effectiveness of the vendor relationship is a growing area of concern for ITSM tool customers, and a possible barrier to tool exploitation. Same with the lack of ongoing communication. So, do sufficient research to help ensure that your organization gets what it needs in terms of relationships and communication.



**Vendor Relationship and (Lack of) Communication**



## Next Steps

## Next Steps

After consideration of the recommended 7-point checklist and associated tips, your next steps should look something like this:

1. Appreciate that this recommended 7-point checklist might not be an exact match to your organization's needs, but it should be a good start.
2. Consider what else needs to be added to your organization's more personalized checklist based on its specific wants and needs.
3. Seek out other tips and good practices related to your organization's personalized checklist.
4. Stay focused on what's actually required by your organization (based on its desired business outcomes).
5. Go beyond marketing collateral to be certain of meeting your organization's needs across the checklist points – the real understanding of vendor and ITSM-tool capabilities and suitability will come via product demos, trials, and proofs of concept.

If you're ready to get started, why not check to see how SysAid matches your needs?  
Our ITSM specialists are always happy to chat.

Yes, let's talk

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For more information, please visit <https://itsm.tools>.



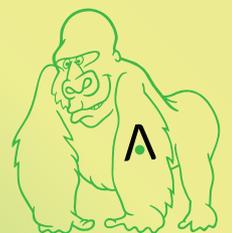
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