SymphonyAI

A Practical Guide to Enterprise Service Management

Many organizations are benefiting from the digitization of what were manually intensive business practices. Whether it's implementing an online portal for ordering products and services or using digital technologies to replace paper-based forms and workflows to enable workforce mobility; digital technologies have enabled businesses to work in new and improved ways.

Many digitalization efforts directly resulted from the actions organizations took in response to the pandemic, when "getting online" was critical for the business's survival. But now that the rush to adopt digital technologies has passed, many organizations are experiencing new and unexpected challenges. The very technologies that enabled those new ways to interact with external customers and internal stakeholders have exposed underlying and preexisting gaps in workflows and capabilities. Organizations struggle to balance the responsiveness expected within today's ever-changing marketplaces and the stability customers and stakeholders' demand. Organizations are trying to find the balance between providing secure digital transactions while at the same time providing solutions that are friction-free and easy to use.

Some organizations successfully digitized aspects of their business practices but are now struggling to maintain momentum in their digital evolution. Some organizations find that only parts of their business practices benefit from digital technology, while others continue to follow antiquated practices or use stand-alone technologies.

One foundational element that can help organizations navigate these challenges and ensure success in using digital technologies is adopting enterprise service management (ESM.) ESM is an enterprise-level organizational capability for delivering business value and outcomes by leveraging the enterprise's resources (including technology) to produce and deliver products and services. Good ESM takes a holistic approach to understanding how value is co-created and how the organization's and technology's components interact to provide that value. Most importantly, effective ESM can draw upon and blend multiple methodologies (both from within and external to IT) to understand how value is co-created for the organization.

Yet ESM is not a new concept. ESM as discussed as early as 2005, was characterized as simply extending IT service management (ITSM) practices across the organization. Since then, organizations have realized that ESM needs to be an **enterprise** capability and competency — not just the domain of a single department — that can leverage those ITSM practices. ESM may be the way to move organizations forward in their digital evolutions.

What Enterprise Service Management means in reality?

Why Enterprise Service Management?

Organizations have realized that other departments — not just IT — are providing services within the organization. Departments outside of IT — like HR, Facilities, and others — are exploring how technology solutions can help manage the delivery and support of their services. Like IT, these other departments are handling similar types of requests, must produce deliverables within defined timeframes, need to track work that is being done, must manage and execute workflows that have defined approval gates, need to make changes to existing services or implement new services, and so on.

So, it's reasonable to think that the delivery and support of these services would benefit from adopting service management principles.

But when many hear the phrase "service management," they think of ITSM. Countless organizations have successfully adopted ITSM practices within their IT organizations. But to many, ITSM is just something the IT service desk does — which is just a part of what ITSM is.

ESM must be much more than just something that IT does. Enterprise service management must be an organizational capability — not just something done in one department. This means ESM isn't just about extending an organization's current ITSM capabilities across the enterprise. Nor does it mean trying to "force feed" other departments' service and support activities into the organization's ITSM system. ESM can and should draw upon and blend multiple methodologies (both from within and external to IT) to ensure value creation in the delivery of services.

Effective ESM improves collaboration, drives overall effectiveness and efficiency, provides insight into organizational performance, and can enable better customer and employee experiences. In other words, ESM is service management for all service providers — like HR, Facilities, IT, and more — within an organization.

Some example Enterprise Service Management use cases

Nearly all business functions provide services to employees or other organizational functions. Regardless of the destination of service delivery, any business function providing services must ensure that the delivery and support of those services are performed effectively and efficiently and meet the needs of stakeholders.

The issue is that these same business functions (outside of IT) typically rely on separate and individual systems specific to that business function. For example, while managing employee-related information and data, an HR

management system doesn't provide any capabilities that support the work needed to provide service and support. Or even more challenging is a situation where a business function relies on spreadsheets, manual (and typically un- or under-documented) processes, emails, and personal knowledge to provide service and support.

The challenges faced by these business functions could be addressed by adopting ESM. How? Here are some examples use cases for ESM.

Human Resources (HR)

- **Change benefits elections** —
  As the life status of an employee changes, the employee will need to change her benefits elections. This activity could be done via self-service.

- **Identify and schedule training** —
  Similarly, employees can schedule and receive computer-based training to instructor-led classes from a catalog of training courses.

Facilities

- **Requests for setting up an office or workspace** — The demand for setting up an office or workspace is seemingly without end, yet typically involves the same repeatable and well-known tasks.

- **Preventative maintenance activities** — Buildings and other facilities require regular maintenance to maintain optimal operating conditions.

- **Routine facilities requests** — Whether servicing a restroom, replacing a lightbulb, or cleaning a break room, these simple tasks result in a request for work to be done — work that needs to be scheduled and managed.

Finance

- **Approval and payment of vendor invoices** — This common activity typically requires high levels of human intervention, as interactions with vendors usually occur outside the finance organization's purview. Yet, the finance organization is responsible for paying those invoices; to do so, Finance typically needs approval from an internal manager outside of the finance organization. The effective management of the lifecycle of these requests is critical in meeting payment deadlines.

Organization-wide

- **Knowledge management** — One of the most significant challenges many organizations face is capturing, maintaining, and reusing knowledge. Whether it's the HR department, Finance, Facilities, or others, having a reliable, accurate, trusted, and authoritative knowledge repository is critical for effective organizational decision-making.

- **Self-service** — Many routine interactions with the various service providers within an organization could be done without any human intervention using self-service. This would free employees to work on more value-added work within their respective departments.

What lines of business should be focusing on?

Adopting digital technologies in response to the pandemic was a key factor in the survival of many organizations. However, this success in using digital technologies has resulted in organizations needing to accelerate delivery practices and changes to meet the demands of digital business. It has also opened new possibilities for adopting other digital technologies, such as chatbots, that can utilize AI's capabilities.

But in many cases, digitization has resulted in an organization that, frankly, can't keep up with the demands of this (new) digital business. Why?

Many organizations are "process poor," so there's been little effort in defining and documenting processes, depicting how inputs are transformed into measurable outputs. Secondly, departments often operate in isolation or act as if they're (at least) somewhat isolated from others within the organization. Organizational workflows and value streams are poorly understood, and if value streams are defined, those value stream definitions are frequently categorized or limited to a single department.

That said, organizations have (often) been successful in operating under these conditions. However, continuing to operate in this mode cannot address the challenges organizations face that are evolving their digital capabilities. The digital age demands that organizations conduct business at digital speeds. This means that lines of lines of business should be focusing on topics like:

- Gaining insights into the performance levels of the enterprise

- Becoming more responsive to changing market conditions

- Driving a differentiated customer experience over competitors

- Getting work done as frictionless and effectively as possible

- Ensuring "easy to do business with" interactions between the organization's customers and employees

A holistic approach to ESM leveraging service management best practices across all parts of the organization can help lines of business answer these challenges and more.

Using Enterprise Service Management as a platform to extend AI-enabled capabilities to other business functions

A further benefit of ESM adoption is the opportunity to extend AI-enabled capabilities across the enterprise.

For example, AI-enabled capabilities can help with:

- **Automated ticket triage** — categorizing and assigning incoming tickets based on historical data patterns.

- **Automated issue or request resolution** — If the AI engine can recognize the issue or request contained within a ticket and how to resolve it, it can also resolve the issue without human intervention.

- **Providing knowledge and solutions to employees** — AI capabilities can be used to personalize the delivery of knowledge and solutions when resolving issues through self-service.

- **Providing solution recommendations** — AI can be used to identify potential solutions and recommendations to staff supporting services provided by internal providers.

- **Automated escalation** — If a performance target is nearing a breach of service levels, AI can automatically escalate the issue to other resources within the department.

By using ESM to extend AI capabilities across the enterprise, organizations can realize transformative change within the organization. The organization can shift from a reactive to a proactive approach to delivering and supporting products and services. ESM provides a consistent way to manage and track work and measure and report on that work. Good ESM results in better communication, collaboration, and integration across the organization, with the added benefit of optimizing humans' work.

Tips for getting started

ESM is ultimately about improving each business function's service delivery and service experience. This will require organizational change management as much as changes to technology. Some business functions will be more motivated than others to embrace ESM. Some business functions may not take on the work needed to adopt ESM. In either case, keeping those functions engaged and involved in enterprise-level decisions that will ultimately impact them is important.

Here are some tips for getting started with ESM:

- **Define the organization's digital strategy** — The first step for any use of digital technologies is to define the strategy for the use of digital technology. What does the business function want to achieve using digital technologies? How will digital technologies impact business models? Effective ESM can help enable organizations to realize their digital strategy.

- **Don't allow ESM to become an IT project** — Build a strong business case and justify the need for ESM in organizational terms, not technology terms. How will the business functions benefit? What new insights into organizational performance will be gained? ESM provides a way to leverage the entire capabilities of an organization holistically.

- **Enlist strong leaders** — The adoption of ESM may result in new work being done in new ways, which may be uncomfortable for some. To succeed with ESM, the focus must shift from achieving only departmental objectives to achieving enterprise goals. Silo thinking must be eliminated from the organization. This means that strong leadership is required.

- **Document current practices** — What kind of services are being provided? Who is involved in the delivery of those services? What inputs come from "upstream," and what outputs are delivered "downstream"? How is successful delivery and support defined and measured? Understanding and documenting current processes, workflows, and automation can be defined and implemented within the ESM tool.

- **Start small and iterate** — Don't try to accomplish everything ESM can bring to an organization in a single step. Look for opportunities to take small steps toward adopting ESM, identify successes and learnings, and then iterate. Demonstrating success and learning following an iterative approach builds competency and confidence in using ESM.

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