

Service Level Management Framework of the Organization

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- Started in the service industry through a family owned business
- IT support manager, Frontline Helpdesk Manager, Customer Service Director
- Director, Customer Services/Helpdesk 9+ years
- Associated with Help Desk Institute (HDI) and STI Knowledge for 8+ years including certifications

Service Level Management (SLM)

- Has important and fundamental, but sometimes overlooked, individual components
- Can change how IT department
 - Views its customers
 - Positions itself as a partner in the organization
 - Manages customer expectations, protect resources
 - Aligns resources to the mission of the organization

This overview touches on and explores

- SLM component order
- Roles
- Content
- Structure
- Ownership
- Maintenance
- Communications/marketing
- Benefits

Why did I ever do this?

- Understand role for myself, team, and organization
- Align with service and support best practices and standards
- Understand SLM component order and content
- Self preservation in a state of change
 - Economy, do more with a lot less
 - Remote support (internal and external); mobile work force
 - Pandemic situation: Anticipate, prepare, practice
 - Social networking
 - Generation differences: Create and market options
 - Outsourced services and operational complexity

Approach - Research myriads of resources

- Text books (industry best practices)
 - White papers
 - Certification courseware
 - Higher education papers
 - Internet
 - Periodicals
 - Help Desk Institute (www.thinkhdi.com)
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Expectations and Objectives

- Service Level Management Overview
 - Glossary – Terms of Endearment
 - State of the Enterprise
 - Why Do This
 - Components: Their Order and Relationships
 - Cost
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The SLM 30-Second Elevator Speech

- The goal of service level management is to maintain and improve Information Technology (IT) service **quality** within **cost** limits **aligned** with and within the organization
 - Do right by the customer and do right for the customer
 - Take the time to do it right
 - Prepare to survive a challenging economy
 - Don't wake-up to yesterday ever again
 - Communicate/market , terms customer understands
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SLM Elements

- **Strategy, Vision, Mission**
 - **Service Catalog**
 - **Operational Level Agreement/Guideline(s)**
 - **Service Level Agreement(s)/Guidelines(s)**
 - **Standard Operating Procedure(s)**
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SLM Elements - Strategy, Vision, Mission

- Align with
 - The highest level of the organization
 - Through each level (Example: as through OLA's)
 - Define customer and organization initiatives
 - The technology-organization Weave
 - Core services (Teaching/learning and Research)
 - Business services (Financials, Registration)
 - Support services (Desktop, e-mail, classroom)
 - Is this valuable; has it ever made SLM difference?
 - Example: Classroom 911
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SLM Elements - Service Catalog

- Manage expectations of what will be found that can be delivered or purchased
- Stated in terms the customer can understand and made available to the customer
- Customer: "What can I expect to receive?"
- Often IT services are vaguely defined and priced, and then sometimes described in terms more meaningful for IT staff (Example: Exchange vs. Tigermail)
- Helps align IT to the organization
- Benefits
 - Define services provided
 - Define what is a service (request) is versus what an incident or problem is
 - Identifies customers; what they want (alignment)
 - Focuses the scope (boundaries) or responsibilities of IT organization; sets expectations; empowers ability to say "no" (the right way)
 - Benefits, a side bar conversation
 - Scope of support will become more broad, sophisticated, and complicated
 - Support will find they cannot say, "We don't support that..."

- The concept of “best effort” will be expanded
 - The Single Point of Contact (SPOC) “store front”
 - Measurement and reporting is a must
 - Summary
 - Defines, in customer focused terms, services IT makes available to customers
 - Should outline “what” and “who” for each service
 - Customer of each service
 - IT owner of each service
 - Foundation for Service Level Agreement (SLA)
 - Maps IT infrastructure to service
 - Strengthens customer working relationship
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SLM Elements - Operational Level Agreement (OLA)

- Ensure consistent levels of service
 - Defines roles and responsibilities that the support center or Helpdesk, and level two support groups agree to follow
 - Level two is responsible for
 - Handling all cases not capable of being resolved by level one
 - Adhering to SLA response and resolution times
 - Ensuring status updates are entered into the case management system in a timely manner
 - Key Contents
 - Level two responsibilities to monitor case management system
 - Tools and channels of communications to escalate/assign to level two
 - Entering status updates
 - Resolving the issue
 - After hours support
 - Practice Example
 - Focused upon vendor/partners sharing and understanding
 - Procedures
 - Roles
 - Responsibilities
 - Lines of communications
 - Expectations for support communications
 - Are not public documents but an agreement between IT organization and each vendor/partner
 - From a high level each OLG defines
 - Definition of product(s) supported
 - Service(s) offered
 - Proactive and emergency (reactive) communications
 - Hours of operation
 - Contact methods and channels of communication
 - Escalation
 - Support request reporting
 - Governance
 - Rehearsal
 - 90-day face-to-face meeting
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SLM Elements – Service Level Agreement (OLA)

- Written in terms the customer can understand
- Published and available for customer consumption
 - Each service could be detailed
- Purpose is to set forth rules of service the support organization will provide and thus manage customer expectations and protect IT resources by sharing customer/provider goals and objectives
- Contents Example
 - Service descriptions: scope of services
 - Service life cycle – stated levels of quality and speed of services
 - Availability
 - Priority/severity levels and response/resolution times

- How to get support – key contacts for all service related issues
 - Hours of operation (including after hours)
 - Contact channels of communications
 - Customer responsibilities
 - Contingency management
 - Review, change, housekeeping
 - Operational Level Agreements (OLA) and underpinning contracts with 3rd party vendors or support organizations
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SLM Elements - Standard Operating Procedures (SOP)

- Provide specific performance policy and guidelines, how to and day-to-day for support professionals
 - Written for and directed to support professionals
 - Outline day-to-day tasks and best/good practices
 - Guides what is expected of support professionals
 - Benefits
 - Sense of familiarity-make customers comfortable
 - Ease of training for support managers
 - Teamwork
 - Consistency
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SLM Best Practice Suggestions from Industry Experts

- Service Level Agreement documented, support customer needs, manage expectations, communicate
 - Know the customer
 - Map the SLA into the case management system
 - Should be measurable
 - Automate reporting
 - Define all SLM terminology in the SLA
 - Include operational information
 - Priority/severity levels, response and resolution times
 - Find a sponsor and champion
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HDI Support Center Standard – Best Practices for Service Management (Highest Maturity Level)

- Meet with customers and adjust services to meet changes in organization requirements
 - Regular review and promotion of support vision/mission statement
 - Support center alignment with the organization
 - Service catalog is maintained, updated, and integrated
 - Case management system: Proactive and automatic notification through escalations brings attention to service level targets at risk
 - SLA, OLA, and contracts
 - Regular SLM meeting to review performance, changes, improvements
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SLM Summary and Wrap up – My lessons learned

- Keep it simple, short and sweet—complexity can be a roadmap to failure
 - Align with and within the organization
 - Keep your ear to the rail
 - Appropriate generous amounts of time for SLM process and governance
 - All parts of the IT support organization must honor the SLM commitment
 - Use only performance metrics that can be tracked and then presented in customer terms
 - Baseline and then set realistic expectations
 - Make SLM part of the change process
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