

# TUNING YOUR ITSM TO A HYBRID, DIGITAL WORKPLACE

A guide for IT leaders





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# The rise of the work-from-anywhere model

Did you know??

**Three-fifths of the workforce, worldwide, is now working remotely.**

*Source: ManageEngine's "The state of ITSM two years into the pandemic" survey<sup>1</sup>*



March 2020 will go down in the annals of history as the start of a pivotal time period that transformed the world. The onset of the pandemic and the subsequent response by governments all over the world changed the way we live and work.

For most employees around the globe, the world of work has always revolved around a cubicle with a desktop. Before the pandemic, IT departments managed secured office networks, delivered walk-up IT support and services, resolved incidents with physical meetings and war-rooms, and did other in-person work.

Today the business landscape, and consequently the IT landscape, has shifted permanently. You may be reading this e-book from the comfort of your home, or while working out of a cafe in Hawaii, or even during a work-cation to the Himalayas.

But what does this radical transformation mean for the traditional ITSM practices that were tuned to the pre-pandemic state of work?

According to ManageEngine's ["The state of ITSM two years into the pandemic"](#) survey, three-fifths of the workforce is now working remotely, which means IT service management cannot return to a time where their primary audience are all based out of office premises.



Today, the work-from-anywhere model demands the best of service experiences: always-on corporate IT, seamless service fulfillment, onboarding remote and hybrid employees, ensuring minimum IT downtime, keeping up with IT infrastructure changes, tracking numerous IT projects, and fortifying the IT estate against emerging security threats.



In this e-book, we will travel with Jake, an employee of Zylker Corp, a fictional global technology company that develops and sells SaaS applications for business intelligence.



We will learn how Zylker faced numerous ITSM challenges when Jake decided to take a work-cation!

And through their journey we will discuss how you can reorient your process workflows and leverage modern ITSM platforms to support a hybrid workforce, all while amping up operational efficiencies and reducing risks!

**NOTE:** Zylker and the names of the people in this whitepaper are fictional and for illustrative purposes only. Jake and his sojourn are inspired by true events. The use cases, scenarios, and frameworks described here are from ManageEngine's experiences and interactions in handling ITSM for hybrid work and best-practice implementations.

CHAPTER 1

# Work-from-Himalayas!



**August 2020:** Jake, a software developer for Zylker, is exuberant when remote work becomes the norm in 2020. He is part of a 2500-strong workforce that spans different departments like sales, marketing, software development, product management, and others.

After a few months of remote work, Jake is bored—stuck around four walls and staring at his laptop. He jumps at the opportunity to travel to the Himalayas when stay-at-home restrictions are removed.

Jake travels to the remote town of Manali in the foothills of the Himalayas and starts working out of a plush resort while exploring the exquisite Himalayan landscape! He works from cafes, out of tents in the wilderness, and from his resort in Manali.

While Jake enjoys his exotic work-cation, he still gets business done! He works on software projects, onboards new employees to his team remotely, fixes bugs in some code blocks, and gears up for the launch of a product to Zylker's SaaS portfolio.

Who or what's helping Jake with his work-nirvana lifestyle?

***You know the answer: Zylker's IT Department!***

But is it too easy for Zylker to achieve?  
Definitely not!

You see, while Jake is enjoying his work-sojourn, so are thousands of other employees working from their homes and elsewhere, creating a massive strain on Zylker's IT infrastructure and existing processes.

This includes provisioning them with the right software and hardware resources, ensuring service-uptime across the enterprise, keeping their tech-stack resilient and future proof, and accounting for all their IT assets!

Hundreds of other enterprises, like Zylker, continue to face service management challenges like the above and struggle to unravel their newfound ITSM puzzle.

***If you are interested in learning how Zylker ended up with a slick ITSM engine, read on!***

CHAPTER 2

# A remote work-ready ITSM platform



# Did you know??

**A majority of managers and IT professionals believe ITSM is effective when done remotely.**

*Source: ManageEngine's "The state of ITSM two years into the pandemic" survey*



As the entire workforce moves remote, the major challenge for Zylker's IT team is to deliver the right services to the right audience. As Jake is a software developer, he requires access to a bunch of development tools, including the IDE and an on-premises code repository his team works on.

Additionally, Jake heads the team's efforts on load testing their prototype apps on Amazon AWS. For this, he requires general-purpose Amazon EC2 instances for performing a distributed load test.

Now these are the requirements of one software developer among thousands of employees across diverse roles. A product marketer in Zylker, who is Jake's friend, might require expanded access to their analytics tool that tracks page visits, session duration, product sign-ups, and lead conversion.

**"Your organization can adapt the frameworks and best practices we discuss here on any ITSM platform of your choice."**

Zylker’s IT team is in a fix! It needs to provision these services through an IT service management solution, but its internal service desk software is inadequate for handling the intricacies of remote work. Moreover, the service desk software is hosted on-premises and lacks SSO capabilities.

The team brainstorms how to build a service management strategy that is:

1. *Scalable*
2. *Secure*
3. *Resilient*
4. *End-user friendly*
5. *Hybrid-ready*

They decide it is time to bring on board a robust ITSM platform vendor to help them fashion out their hybrid ITSM strategy. After several rounds of evaluations, demos, and competitive RFPs, Zylker shortlists ManageEngine ServiceDesk Plus.

## 2.1 | Stepping into modern ITSM

Zylker starts its migration to the new tool by mapping out its services and the various employee personas it serves.

infrastructure that supports these services, and employee-facing business services.

The starting point involves a complete audit of its entire IT service portfolio to identify the critical services, the

Once this is done, Zylker moves to identify employee personas and determine their access privileges for various IT services.

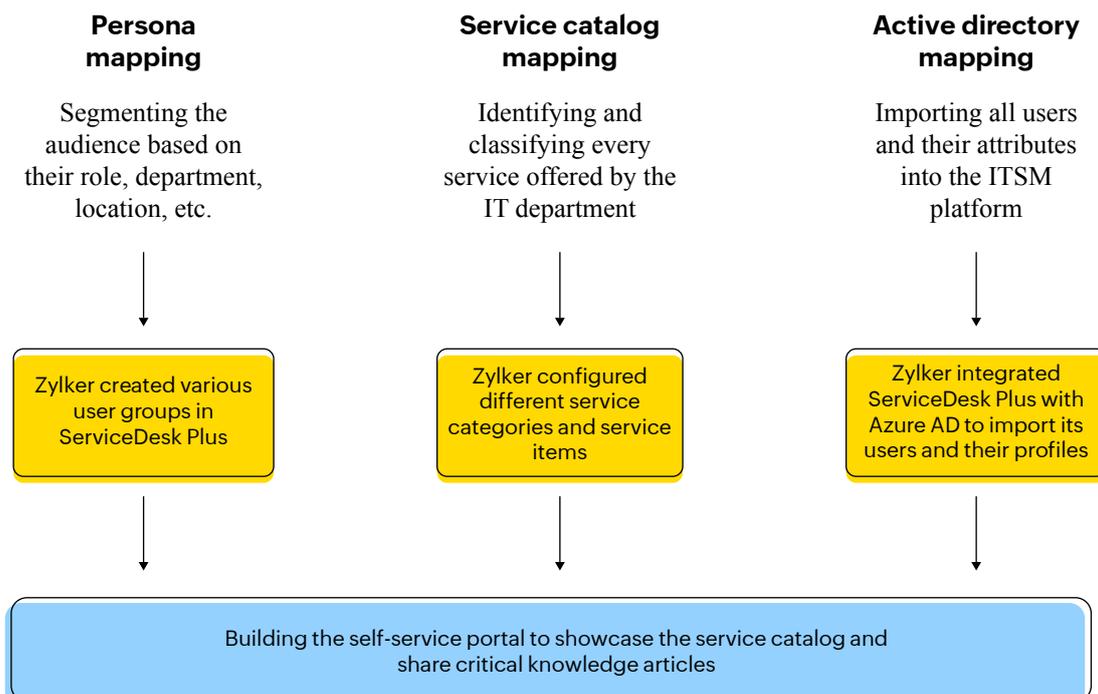


Image 2.1: Building a self-service portal for Zylker

Zylker relies on the Microsoft Azure Active Directory for access management within the organization. It uses Azure AD for single sign-on and MFA across its cloud and on-premises applications.

ServiceDesk Plus integrates with Azure Active Directory out of the box and imports users from the AD into the platform seamlessly.

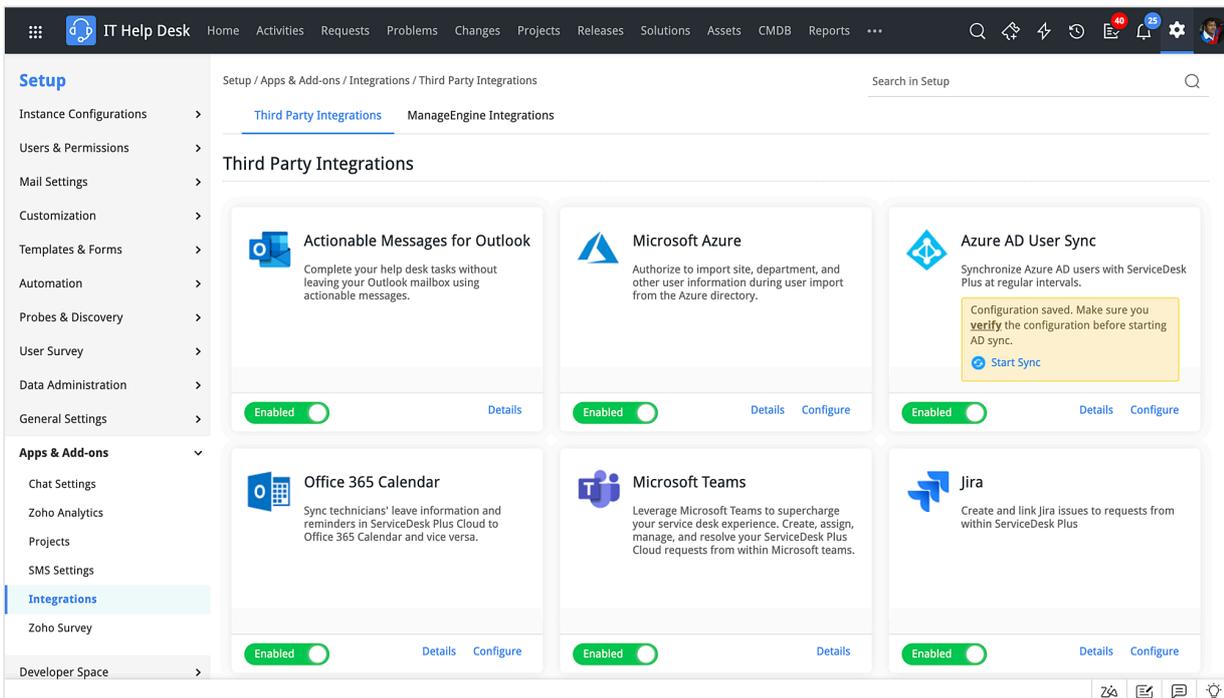


Image 2.2: Business integrations in ServiceDesk Plus

Once all the employees along with their job-titles, departments, and other attributes are in, it is time to get the service catalog up and running.

Now that Zylker has moved completely remote, it needs to provide its employees with access to various collaboration tools, SaaS apps, and other software. Employees

also require new hardware, such as laptops, mobile devices, and tablet computers.

On top of this, Zylker implements a VPN to help remote developers like Jake access their source code repository. It is a critical service that needs to be offered only to remote developers to safeguard the integrity of their software.

## 2.2 | A 3-step service management effort

**Step 1:** Once Zylker imports users from Azure AD, it creates various user groups to segment its audience.

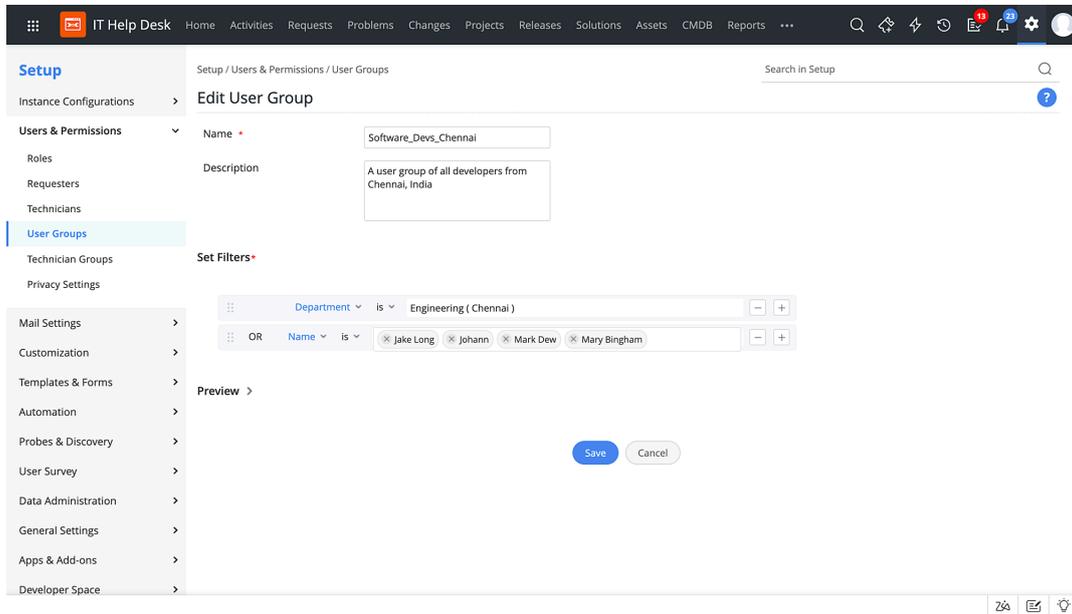


Image 2.3: User groups in ServiceDesk Plus help segment the employees

**Step 2:** Zylker identifies all the services that are on offer and categorizes them broadly in the service catalog.

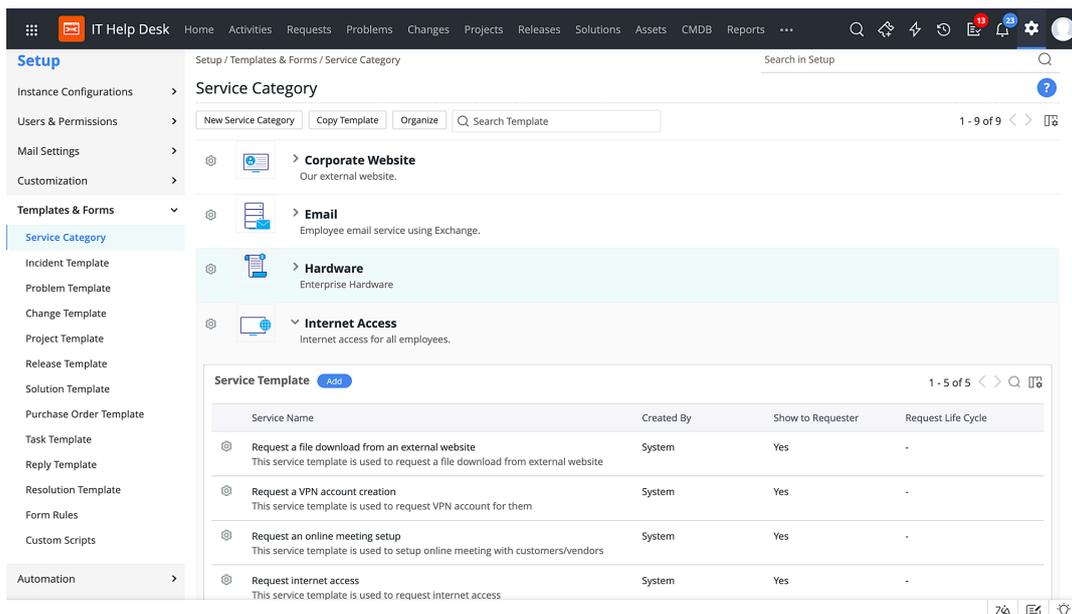


Image 2.4: Service categories in ServiceDesk Plus

**Step 3:** The IT team builds user-friendly forms packed with automations, making it easier for the IT technicians to collect accurate information. Zylker presents these forms to the right user groups that are eligible to request the services underlying the forms.

The screenshot shows a 'Create a service request' form for 'Employee onboarding'. The form is divided into several sections:

- Access destinations:** A list of checkboxes for various locations, with 'Tower floor 4 - HR repository' and 'East wing - document storage' selected.
- Office timings:** A list of radio buttons for different days of the week, with 'Saturday - Sunday (Operations and Admin teams only)' selected.
- Resource Details:** A section titled 'Workstation and software' containing two dropdown menus: 'Software required' (selected: Office 2021 - Mac, \$99.00) and 'Workstation model' (selected: MacBook Pro 16", \$1500.00).
- Cost Details:** A summary table on the right showing:
 

<b>Total Cost</b>	\$ 3099.00
2 resource(s) added	
<b>Service Cost :</b>	\$ 1500.00
<b>Resource Cost :</b>	\$ 1599.00
Office 2021 - Mac (Software required)	\$ 99.00
Macbook Pro 16" (Workstation model)	\$ 1500.00

Image 2.5: User-friendly and dynamic forms in ServiceDesk Plus

And all of these are available right from within the self-service portal of Zylker!

The screenshot shows the 'IT Help Desk' self-service portal. The interface includes:

- Header:** Navigation tabs for Home, Requests, Projects, Releases, and Solutions.
- Search:** A search bar with the placeholder text 'Search for help'.
- Main Action Buttons:** Three large buttons: 'Report an issue' (red), 'Request a service' (green), and 'View Solutions' (grey).
- Dashboard:** A grid of four sections:
  - My Summary:** Shows request counts: 29 Pending, 0 On Hold, 13 Completed, 0 Awaiting Up...
  - Announcements:** Lists service down events, such as 'Internal services are down' on Aug 11, 2022.
  - My Assets:** Lists user assets like 'MacBook Pro 02 Apple' and 'MacBook Pro 03 Apple' with 'Report an issue' buttons.
  - Most Used Service Te...:** Lists popular service templates like 'Employee onboarding' and 'Request an account creation in Active Directory'.

Image 2.6: The IT self-service portal in ServiceDesk Plus

Employees like Jake who may require VPN access, expanded mail storage, or even new SaaS licenses for their team members, can simply log on to the Zylker IT help desk using their Microsoft Azure credentials and request the relevant services.

Zylker also adds various knowledge articles about VPN issues, remote-work best practices, laptop and mobile device replacements, etc., that help drive self-service adoption, shifting-left a significant amount of ticketing traffic.

Now to manage its ITSM operations, such as routing tickets, prioritizing the critical ones, and establishing playbooks, Zylker leverages ServiceDesk Plus' automation engine that comprises of:

1. *Form rules*
2. *Business rules*
3. *Technician auto-assign*
4. *SLAs*

Let's learn how these various automation components help Zylker build synergy into its ITSM operations.

CHAPTER 3

# Blazing away the red-tape with automations



# Did you know??

**Nearly 60% of IT professionals and managers agree that more and more automation will find its way into ITSM as it adapts to the new ways of working since the pandemic.**

*Source: ManageEngine's "The state of ITSM two years into the pandemic" survey*



Before the pandemic struck, Jake had requested a workstation for testing a new feature. The process was manual, as Zylker's previous internal help desk lacked automation capabilities.

While it converted emails into tickets, the automation stopped there. All the other steps involved in service fulfillment were performed by IT technicians manually. This led to a substantial amount of time sunk into bureaucratic functions, and the service experience was poor.

*However, all of those problems are now a distant memory as Jake, chilling in a river-side cafe in the Himalayas, gets AWS EC2 instances provisioned to his team quickly with the help of automations.*



Image 3.1

# 3.1 | The service fulfillment engine, on auto-pilot

## 1. A dynamic, adaptive form:

For starters, the IT service desk configures a form that dynamically alters itself based on Jake’s responses, eliminating the need for back-and-forth questions.

Form rules in ServiceDesk Plus helps Zylker with condition-based actions such as showing, hiding, and mandating fields, setting options and tasks, and even executing scrips within the form template!

Here’s how easy it is for Jake to fill out the request form:

Resource Details

Amazon EC2 specifications

What is the purpose of a new EC2 instance?  
Load test of prototype apps

Choose the AWS Region in which you want to provision the EC2 server  
Asia Pacific (Singapore)

Choose an Amazon Machine Image  
Amazon Linux AMI 2021.09.1(HVM) SSD Vol...

Choose EC2 Instance type

- General Purpose - t2.micro
- General Purpose - t2.nano
- General Purpose - t2.small
- General Purpose - t2.medium
- General Purpose - t2.large

Add Request Reset Cancel

Image 3.2: Form rules in ServiceDesk Plus infuse automations into request forms

## 2. Automated workload management

Once the request is created, ServiceDesk Plus' routing engine assigns Jake's ticket to the technician with the lightest workload. Technician Auto Assign in ServiceDesk Plus handles workload management based on one of three algorithms: Round Robin, Load Balancing, and Artificial Intelligence.

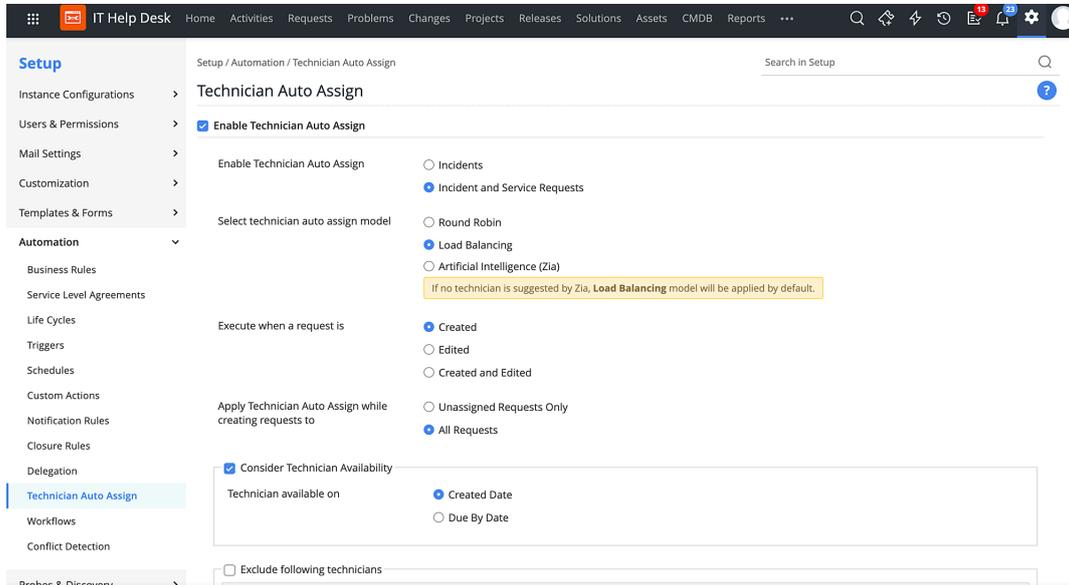


Image 3.3: Automated workload management in ServiceDesk Plus

This way, Zylker is able to ensure that no ticket remains unattended as the technicians assigned to the ticket receive push notifications within ServiceDesk Plus, alerts in their Teams chatbot, and actionable cards to their Outlook mailbox.

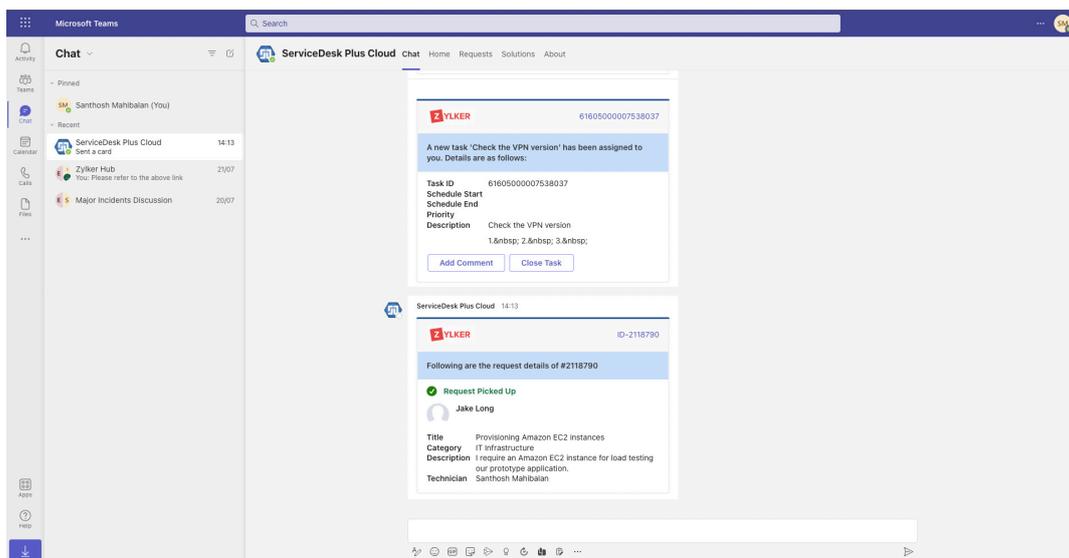


Image 3.4: Multifarious communication through different apps

This automated, omni-channel communication spans the entire ticketing workflow, right from the creation of the ticket to its closure.

### 3. Governing service fulfillment

As soon as the ticket is created, a predefined SLA starts ticking and defines specific time targets for the technician to respond and fulfill the ticket.

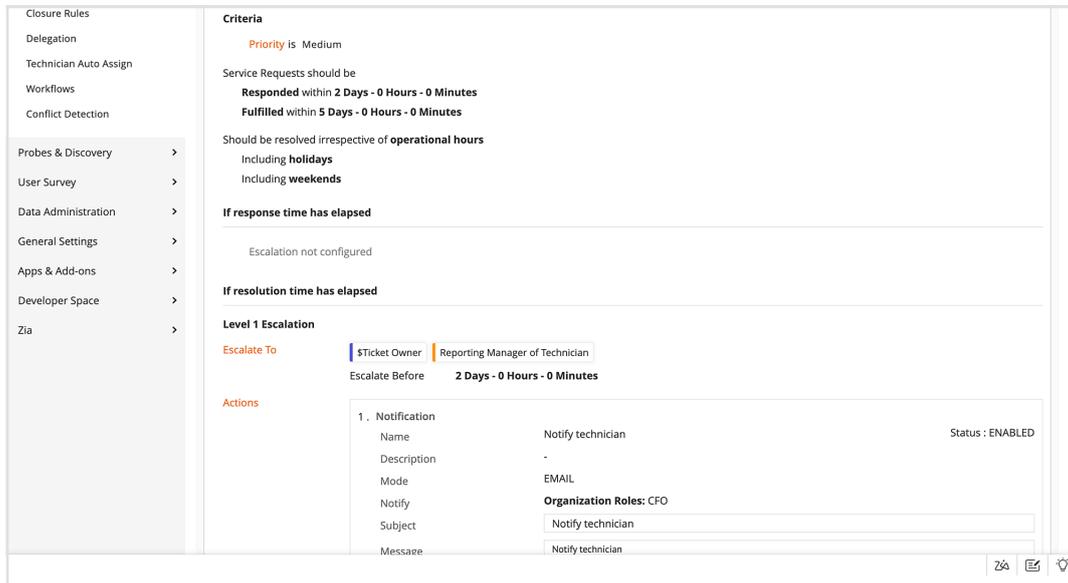


Image 3.5: Condition-based SLAs and escalations in ServiceDesk Plus

Zyker takes a proactive approach to SLA violations by escalating the request for EC2 instances two days before the fulfillment target! The technician receives a notification and the priority of the service request is bumped from medium to high.

These automations can hasten a technician to accelerate the process of provisioning the AWS instances by creating tasks and delegating them to the relevant teams.

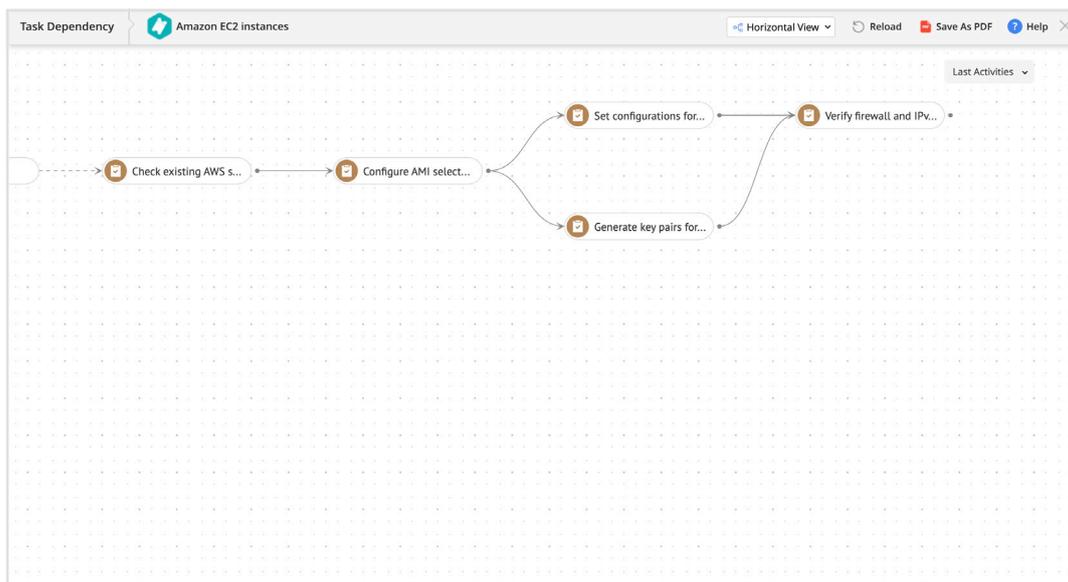


Image 3.6: Task management in ServiceDesk Plus

## 4. Retaining organizational oversight

As Zylker follows a stringent policy around service fulfillment due to financial and compliance mandates, Jake's reporting manager has to be kept in the loop. Zylker's IT service desk configures condition-based automations to trigger notifications to Jake's manager, Andrea, about the request for EC2 instances.

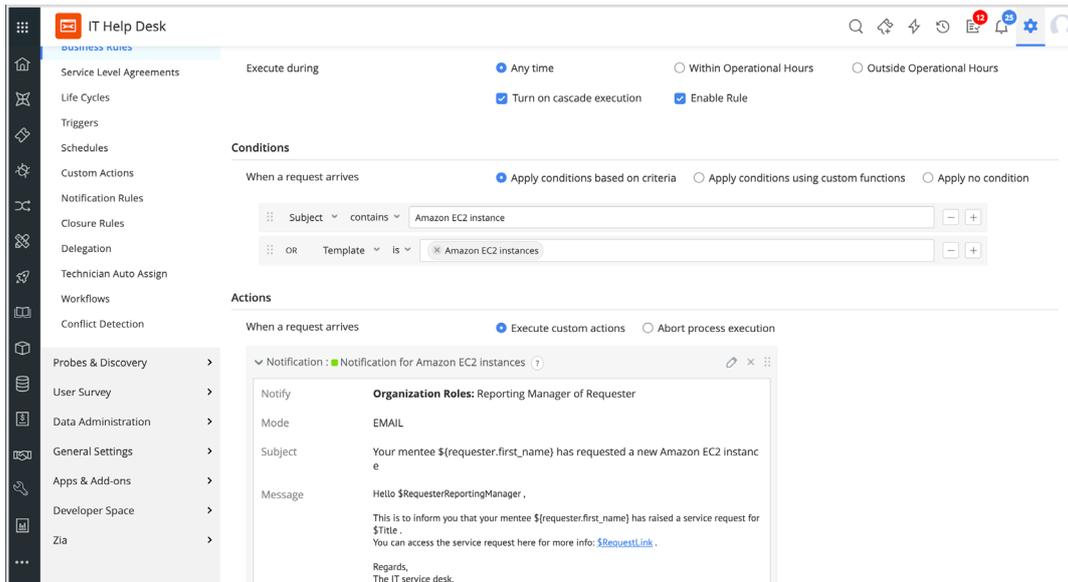


Image 3.7: Business rules to automate bureaucratic functions

Andrea also receives an automated request for approval which helps retain high-level oversight on critical services and their delivery.

Zylker also ensures that the assignment of a technician to the ticket follows the approval workflow.

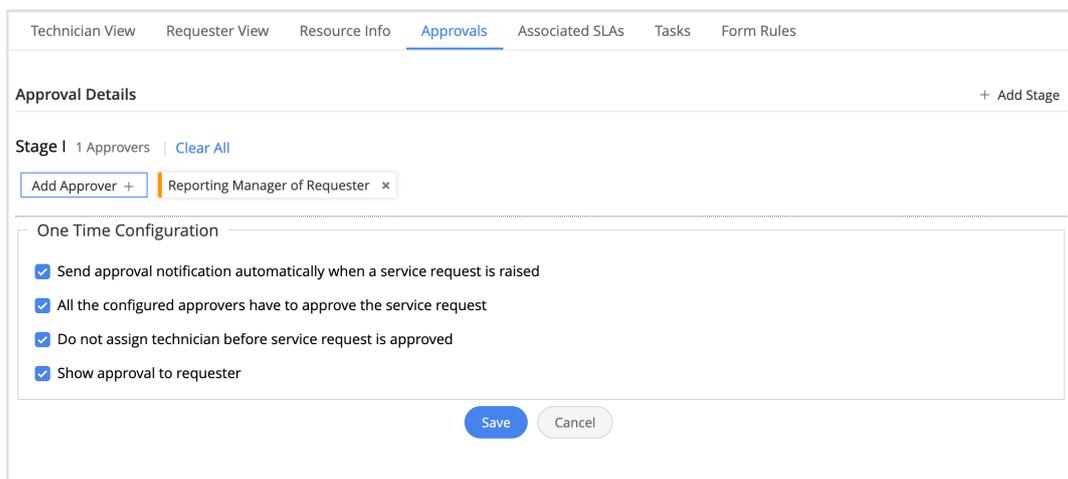


Image 3.8: Multi-stage approvals

## 5. Exceptional employee experiences

Once the tasks are complete, the technician verifies with Jake over Microsoft Teams that the EC2 instances are set up in line with his expectations. They ask Jake to close the request.

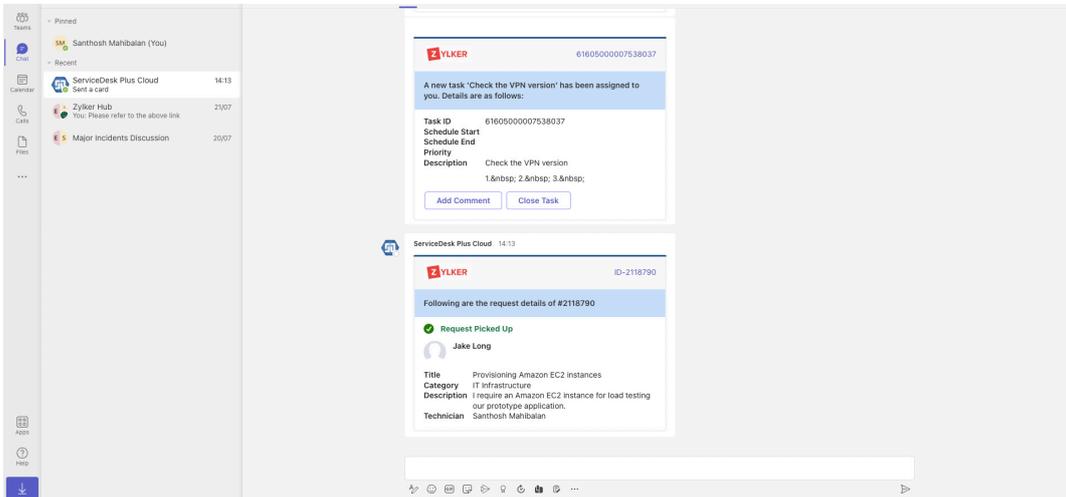


Image 3.9: The ServiceDesk Plus app within Microsoft Teams

But, alas, our Jake is off to the see the glaciers in Manali and forgets to close the ticket.

Well, the technician isn't perturbed! Closure rules in ServiceDesk Plus help Zylker to close a resolved ticket automatically if the requester does not take an action.

---

**Confirm User Acknowledgment**

Do you want to prompt a confirmation message to technician asking if user has acknowledged the resolution?

Yes, prompt a message before resolving the request

No, don't prompt a message

**Request Closing Process**

Manual Closure

Automated Closure

Close resolved requests after  days

In Automatic Closure mode:

- Technicians will be prompted to enter the resolution details when they mark the request as **Resolved**. These details will be considered if the request is automatically closed.
- The requester is notified by email after the request is marked as **Resolved**. The requester can close or reopen the request as directed in the email.
- If the requester takes no action, the request is automatically closed after the specified number of days.

**Closing Requests Associated with Task**

When all the associated tasks are completed, Move the request status to

---

Image 3.10: Closure rules to validate ticket fulfillment

## The service fulfillment journey in Zylker now runs on auto-pilot, helping both technicians and end-users save valuable time!

Zylker's IT service desk recognizes the importance of discerning the quality of their employee experience. Besides keeping tabs on their operational metrics, they leverage satisfaction surveys to measure and continually refine their employee experiences.

1/1 100%

CSAT Survey

---

1. How satisfied were you with the overall time your technician took to resolve the incident?

☹️ ☹️ ☹️ ☹️ ☹️ 😊 😊 😊 😊 😊 😍

2. How would you rate the quality of communication of the IT Services team?

0 10

Very dissatisfied Decent Very satisfied

3. Rate your satisfaction with our product/service in the following categories:

Image 3.10: Employee experience surveys

## Here's a rundown of how the whole service fulfillment episode panned out!

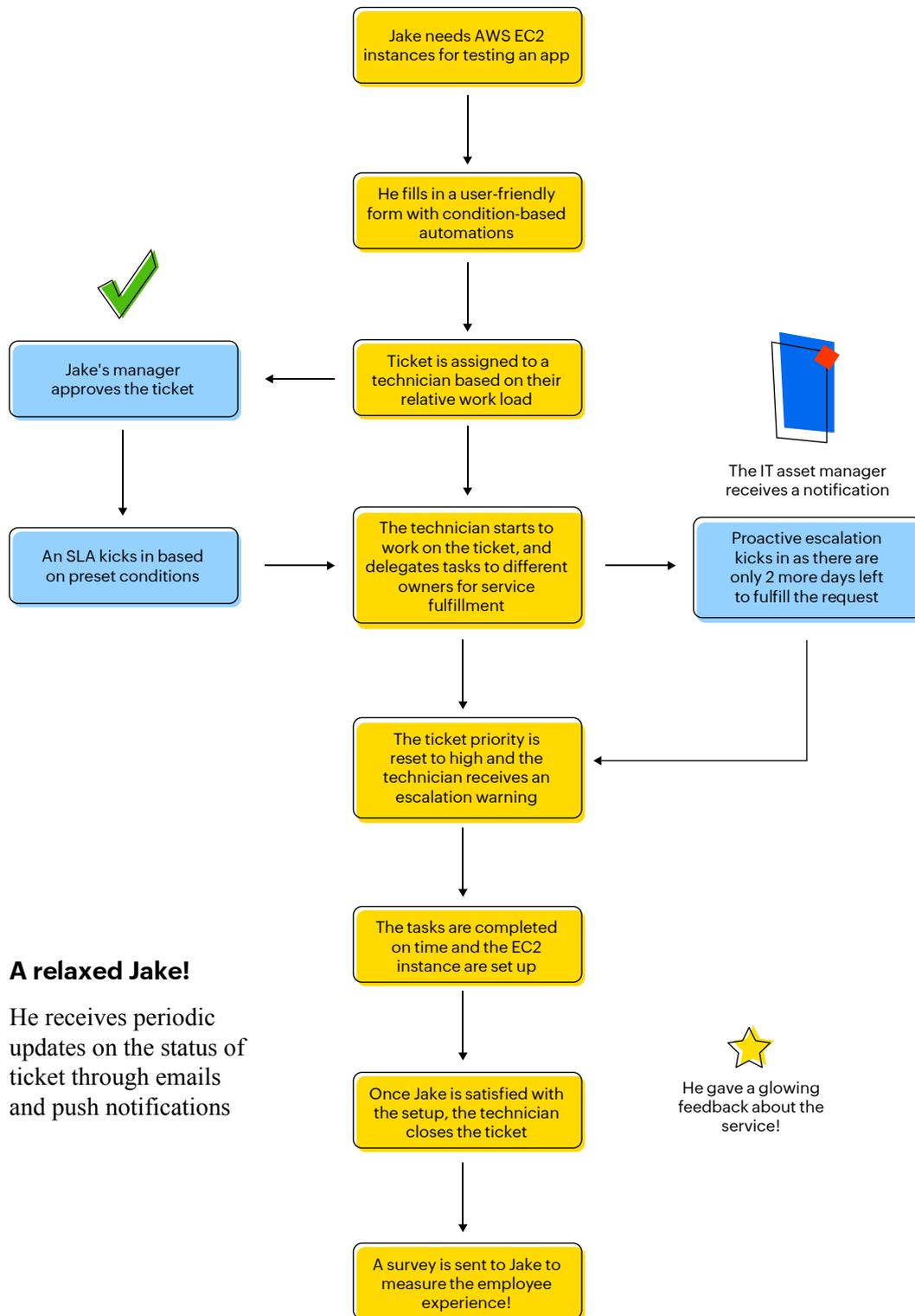


Image 3.11: Zylker's hybrid-ready service fulfillment framework

CHAPTER 4

# One portal to serve IT all



## 4.1 | A convoluted employee onboarding process

**2021:** While Jake explores the remote regions of the Himalayas, some important decisions are made by Zylker's management. Its CEO believes the time has come for them to evolve from remote work and adopt three different work models.

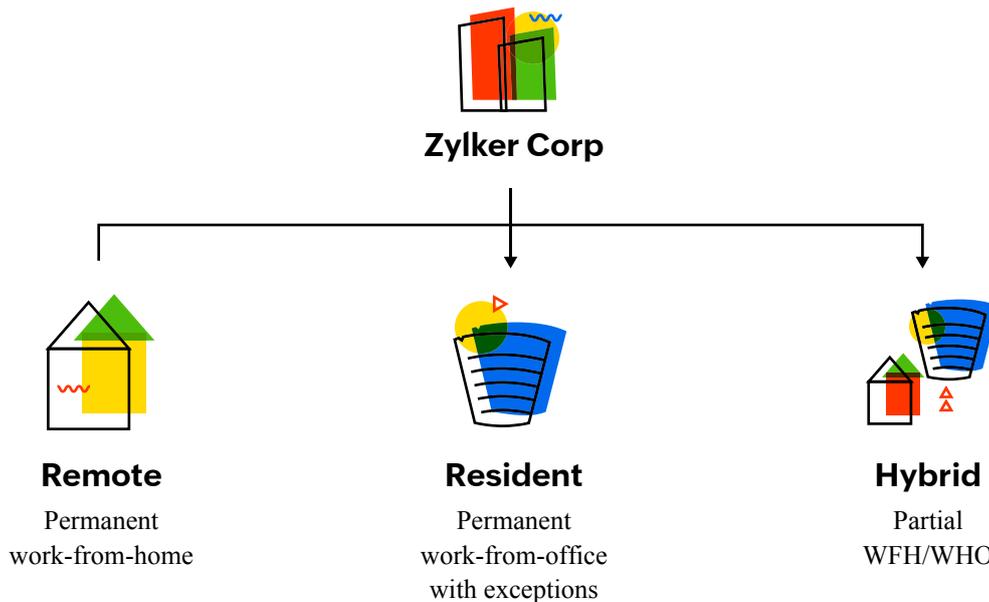


Image 4.1: Zylker's new work models

Zylker's new work models are the result of hiring new employees across its offices around the globe. It plans to onboard new employees into any of the three work models depending on the team requirements and the employee's preference.

Jake predictably opts for the remote work model and plans to expand his team due to the increasing workload.

The IT service desk is weary at the prospect of onboarding employees across these work models because of their pre-pandemic experiences of working with multiple departments.

Before the pandemic, other enterprise service departments such as HR, Finance, and Facilities had their own microcosms and did not play well with IT's process frameworks. Their tools were disparate, disconnected, and the departments too often worked in silos.

Once again, the IT Department is puzzled on how to deal with this new complexity: a multi-layered employee onboarding workflow.



## Remote

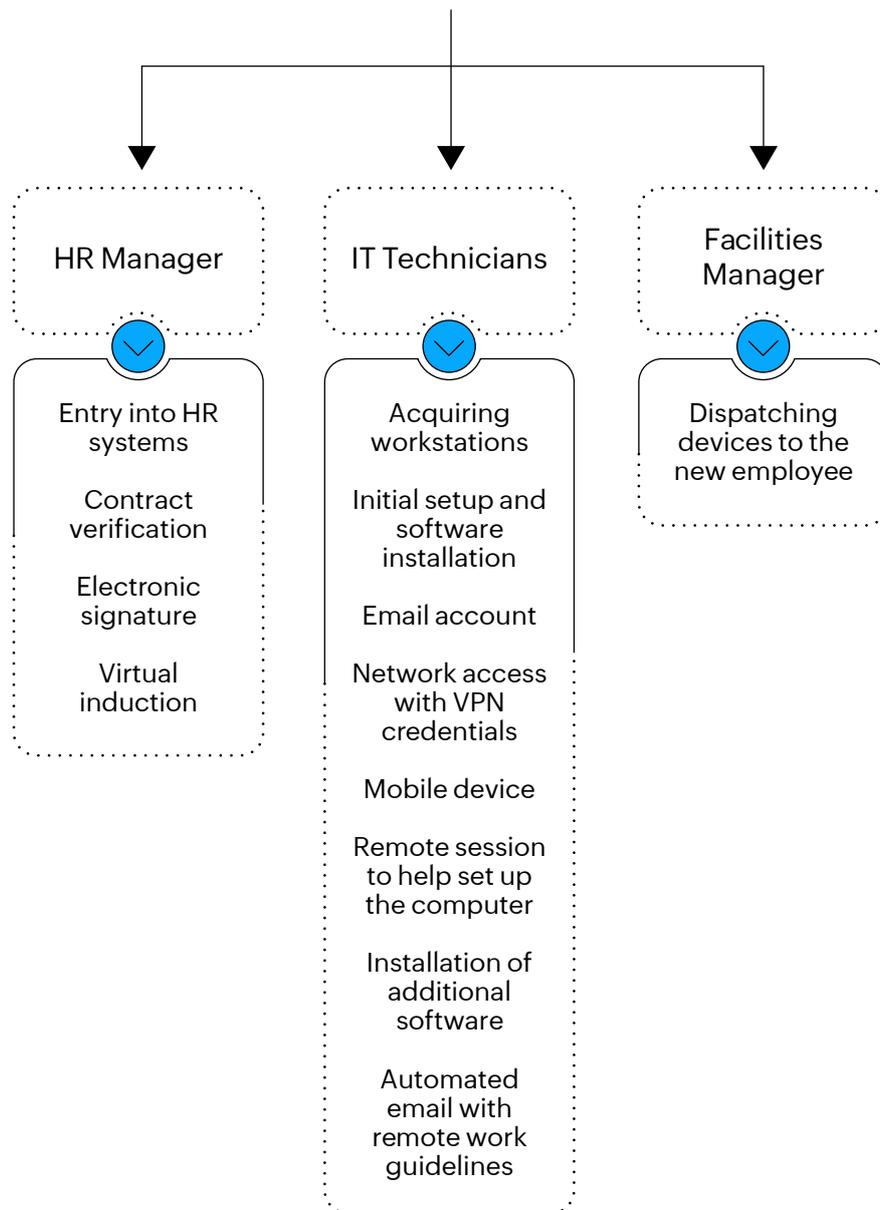


Image 4.2: A complex employee onboarding process (a)



## Resident

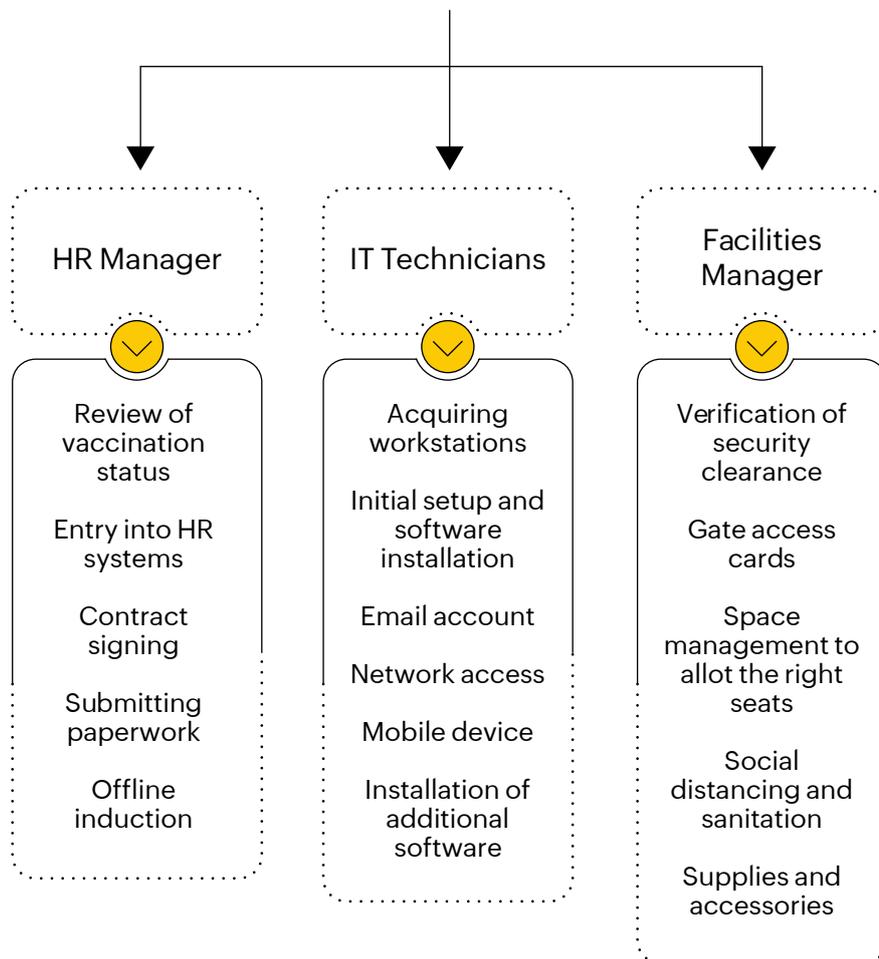


Image 4.2: A complex employee onboarding process (b)



## Hybrid

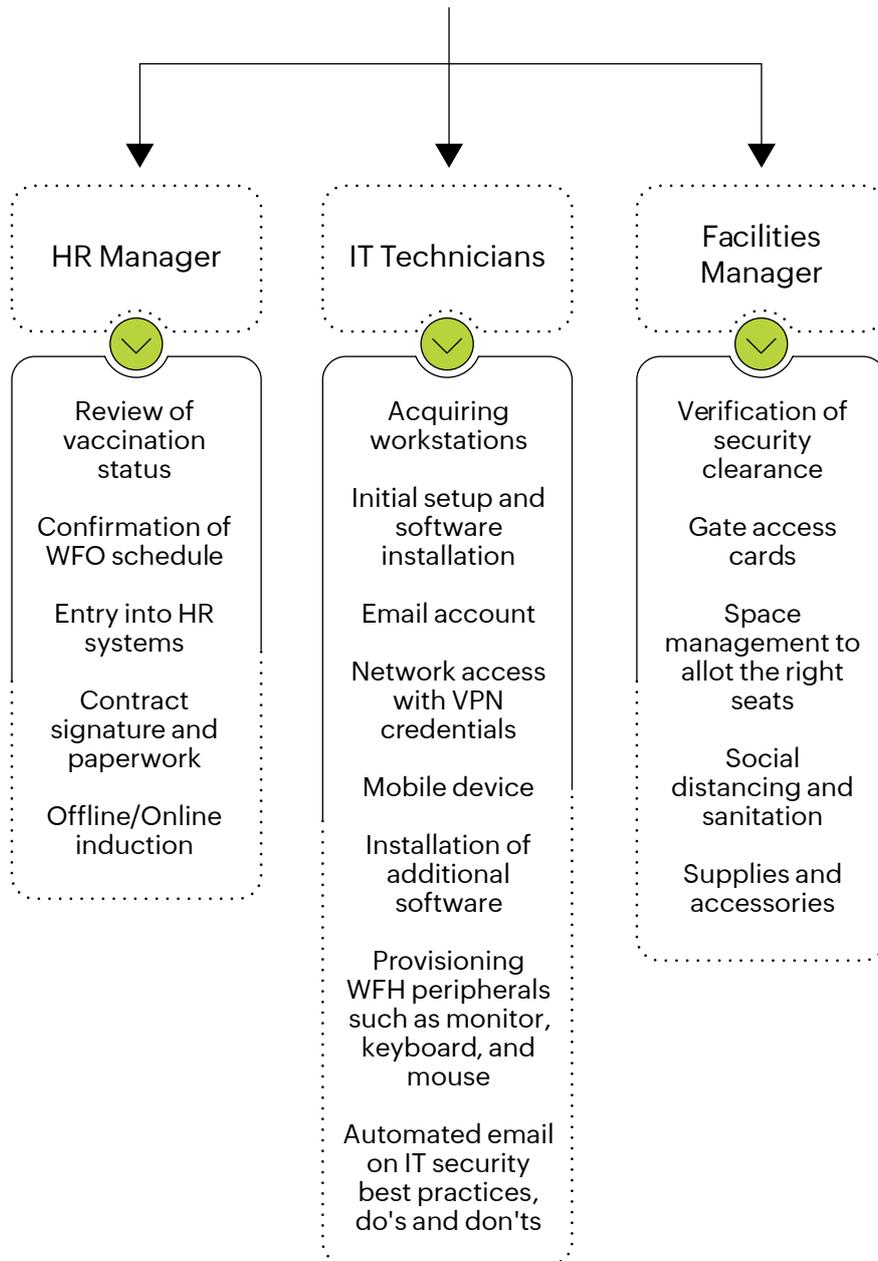


Image 4.2: A complex employee onboarding process (c)

**But ManageEngine's customer success and implementation teams come to Zylker's rescue and introduce them to ESM in ServiceDesk Plus.**

An ESM platform helps Zylker bring every enterprise service department onto a single service management platform, unifying Zylker's IT and enterprise service delivery. And, the icing on the cake, these IT-adjacent departments can take advantage of the workflows and best practices that Zylker's IT relies on and apply them to their own unique operations.

## 4.2 | Zylker's hybrid employee onboarding framework

**Step 1:** After demonstrating the value of a single service management platform to the heads of the HR, Facilities, and Finance departments, IT receives executive buy-in for bringing ESM into Zylker.

autonomous. It takes less than a minute to create these new instances on the ServiceDesk Plus platform and import their employees as end-users in the relevant service desks. *(Note that an IT manager can be an end-user with respect to the HR and Facilities service desks.)*

They spin up new service desks for the enterprise service departments, each being data and process

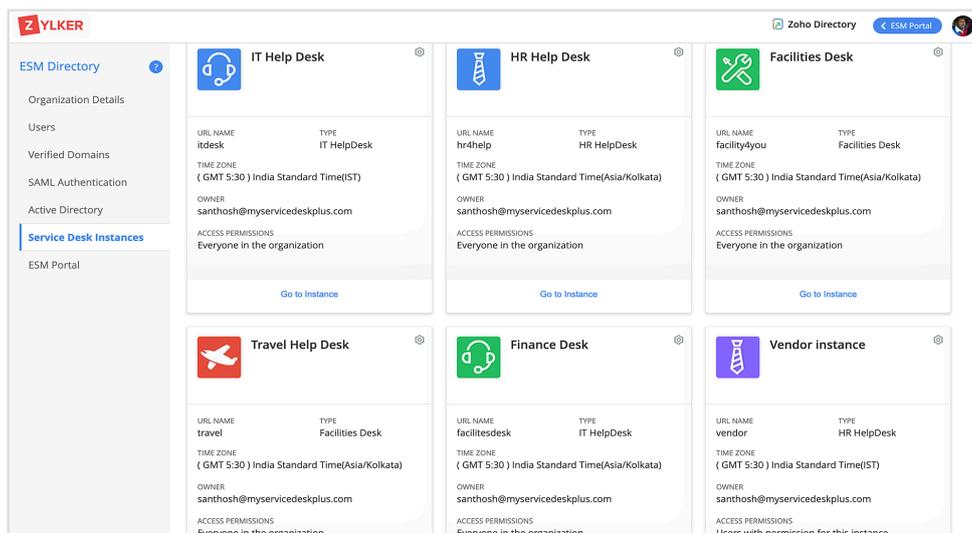


Image 4.3: A rapid-start enterprise service desk

**Step 2:** The IT Department assigns an owner to each service desk and they proceed to train them on how to set up templates, automations, workflows, and other service management configurations that IT has succeeded with.

Here are some of the services offered by the Facilities Department:

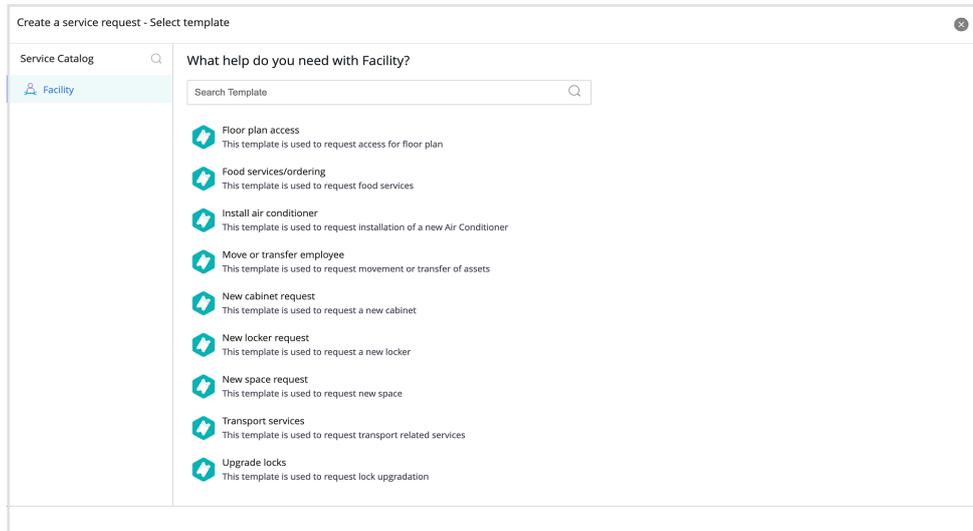


Image 4.4: The facilities service catalog

**Step 3:** Zylker’s CIO decides to customize the enterprise portal with knowledge articles and widgets that can help employees with self-service around numerous topics such as VPN setup, insurance claims, COVID-19 awareness, seating plans, etc.

The IT Department swiftly customizes the enterprise portal with the help of the out-of-the-

box HTML editor, personalizing the enterprise service delivery.

Once all the departments have configured their service offerings and unique workflows, it is time to introduce ESM to Zylker’s employees, especially Jake, as he is hamstrung by a talent crunch in his team and wants to onboard a candidate as soon as possible.

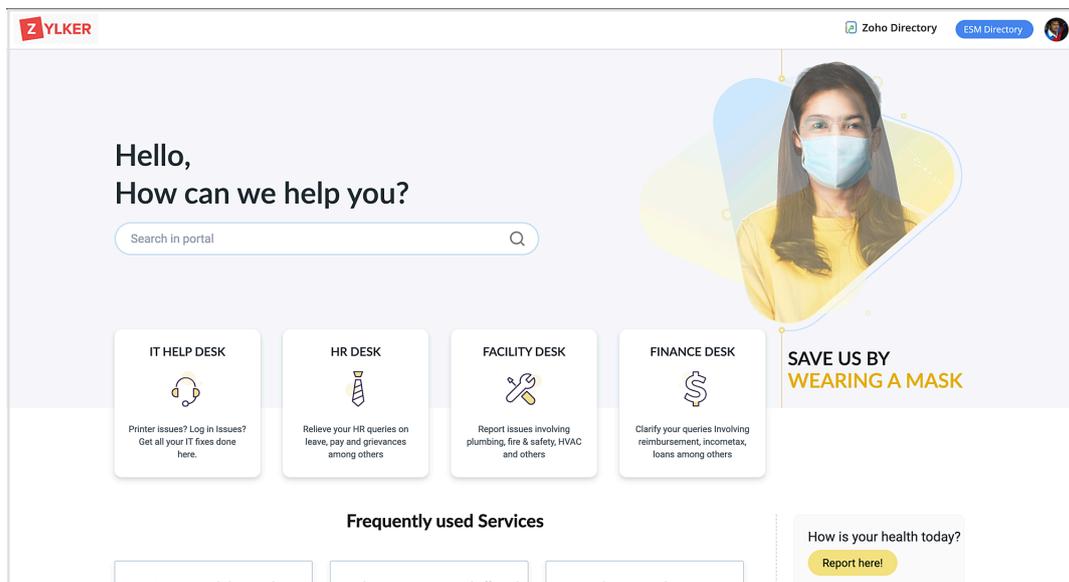


Image 4.5: A customized ESM portal

**Step 4:** The ESM portal is an instant hit. Jake finds it easy to access the onboarding service from the HR service desk and quickly fills out the form to create an onboarding request.

Image 4.6: The employee onboarding form in ServiceDesk Plus

**Step 5:** Once the onboarding request reaches the HR department, their associates begin service fulfillment without missing a step. Well, how could they not, when everything is mapped visually!

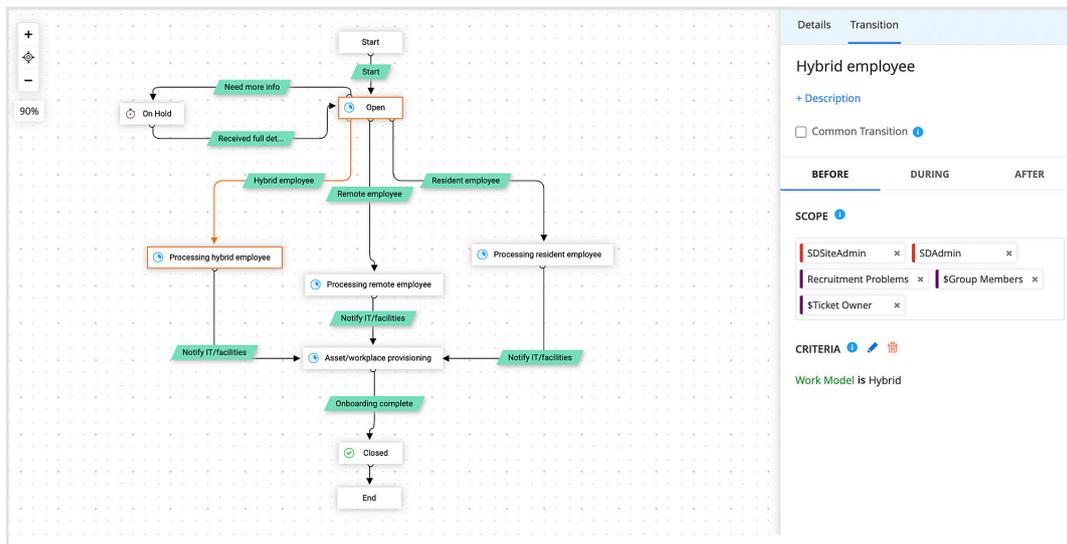


Image 4.7: Zylker's employee onboarding playbook as a life cycle in ServiceDesk Plus

Zylker recognizes the need to document its employee onboarding playbooks within the service management platform, as it involves numerous dependencies and multiple teams working to deliver the service.

The HR team builds a workflow using request life cycles in ServiceDesk Plus and infuses automations into it.

For example, the onboarding workflow guides the HR associates with transition buttons. These buttons are visible based on the scope defined in the lifecycle.

As you can see in this ticket, only the **Hybrid employee** button is visible while the workflow contains two more called **Remote employee** and **Resident employee**.

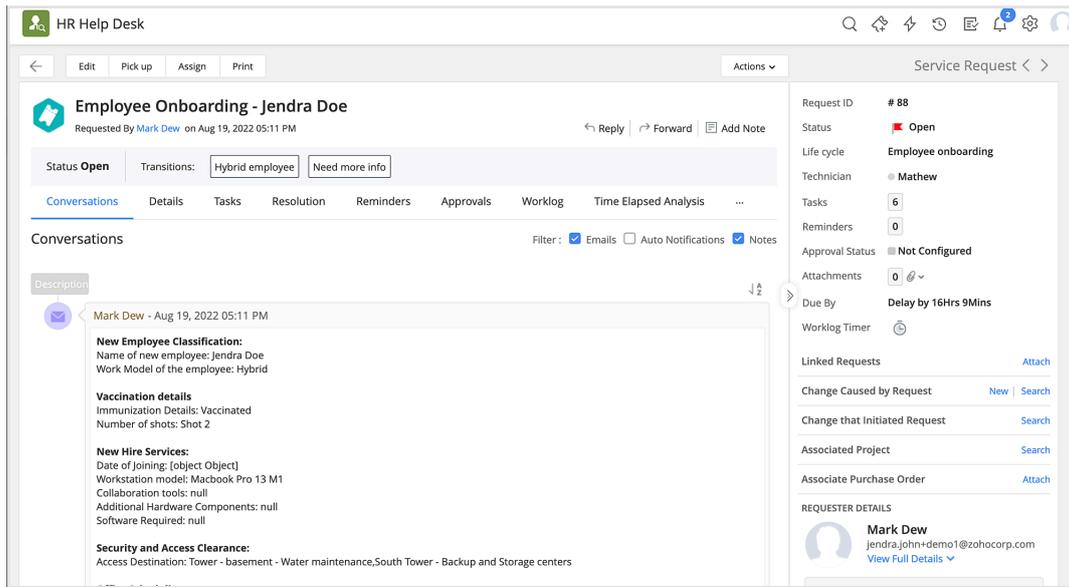


Image 4.8: Jake's new employee onboarding ticket

Zylker has restricted the visibility of these transitions by specifying a scope criteria that takes into account the work model selected by the requester.

These conditional checks and automations bring process adherence to the forefront for every enterprise service department in Zylker, be it IT, HR, or Facilities.

**Step 6:** Once an HR associate initiates the onboarding process, they also notify the IT and Facilities departments from within the ticket.

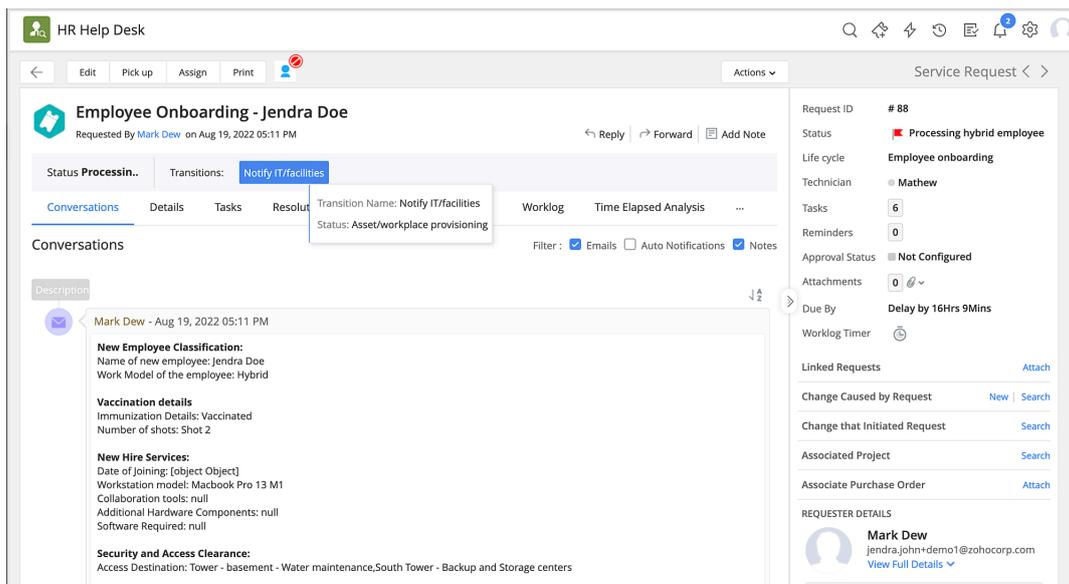


Image 4.9: The HR associate clicks on the transition button to notify the IT and Facilities departments

Immediately, this leads to the creation of child tickets in the IT and Facilities service desks thanks to the low-code automations conjured by Zylker's IT Department that carry over pertinent information to the other service desks.

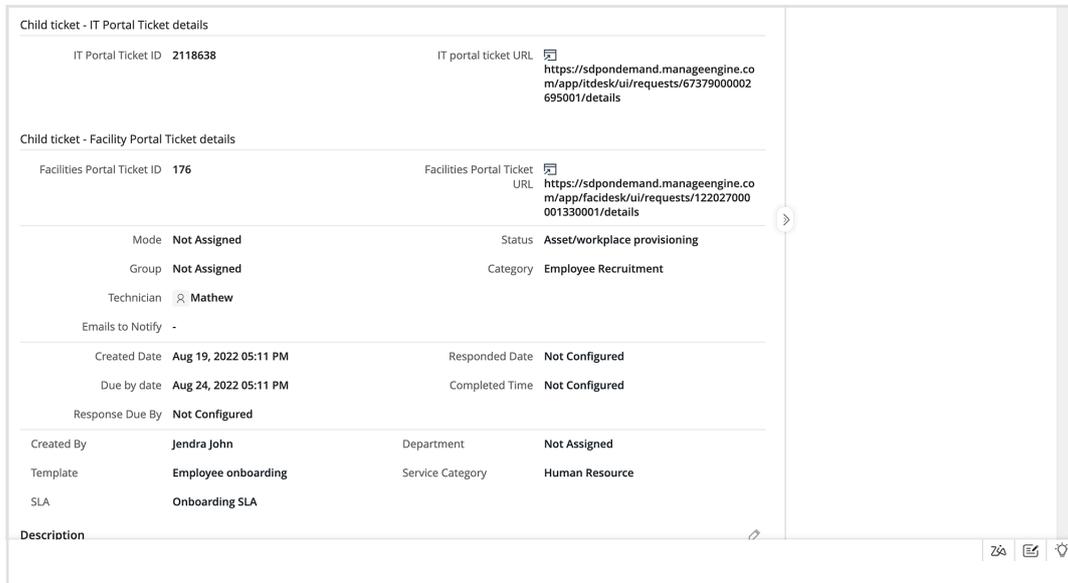


Image 4.10: Child tickets that are linked to the parent ticket in the HR service desk

This way, Zylker sets up a cross-functional onboarding workflow that brings multiple departments together, while breaking down silos that were previously the norm.

**Step 7:** As soon as the IT Department receives the child ticket, it verifies the information carried over from the HR Department. The new ticket also carries a link to the parent ticket in the HR service desk.

Now, all that the IT team needs to do is to create a new user in Zylker's AD and provision the right hardware and software for Jake's newest team member. To achieve this, the IT team has integrated the service management platform with other IT management apps such as ManageEngine ADManager Plus and Mobile Device Manager Plus.

These capabilities help Zylker orchestrate various IT operations such as user management and endpoint management from within the onboarding ticket.

Zylker's choice of an ITSM platform that integrates natively with business and IT apps helps it achieve IT-business workflows and orchestration that were otherwise too complex to implement.

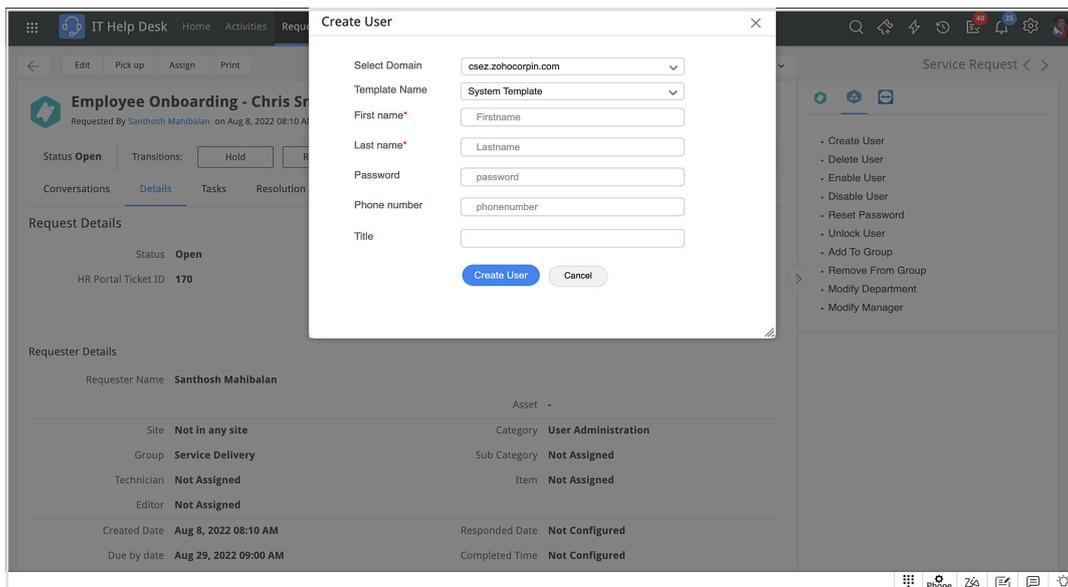


Image 4.11: The IT technician creates a new user in the AD using the ADManager Plus integration

**Step 8:** Meanwhile, let us take a peep into what the Facilities service desk are up to! While the Facilities team did not have too many things on their to-do list for remote employees, when it comes to hybrid work, their plates are full.

With lockdown restrictions being lifted, several teams are returning back to their workplaces.

According to Statista, remote-work hit an all-time low in April 2022 with only 7.7% of those employed in the US saying they work remotely due to the pandemic. This transition marked the start of the [“Great Return” to workplaces.](#)

*(Jake might work from the Himalayas, but he too acknowledges that some of his team members prefer to work in a hybrid fashion.)*

So what does all this imply for workplace management?

A massive space crunch as the workforce marches back to their offices!

Does Zylker have a plan of action to prevent this? Yes.

Zylker’s ESM platform offers a dedicated space management module for the Facilities service desk. Within this platform, they have visualized their entire office campuses spread across the country in a hierarchical tree model.

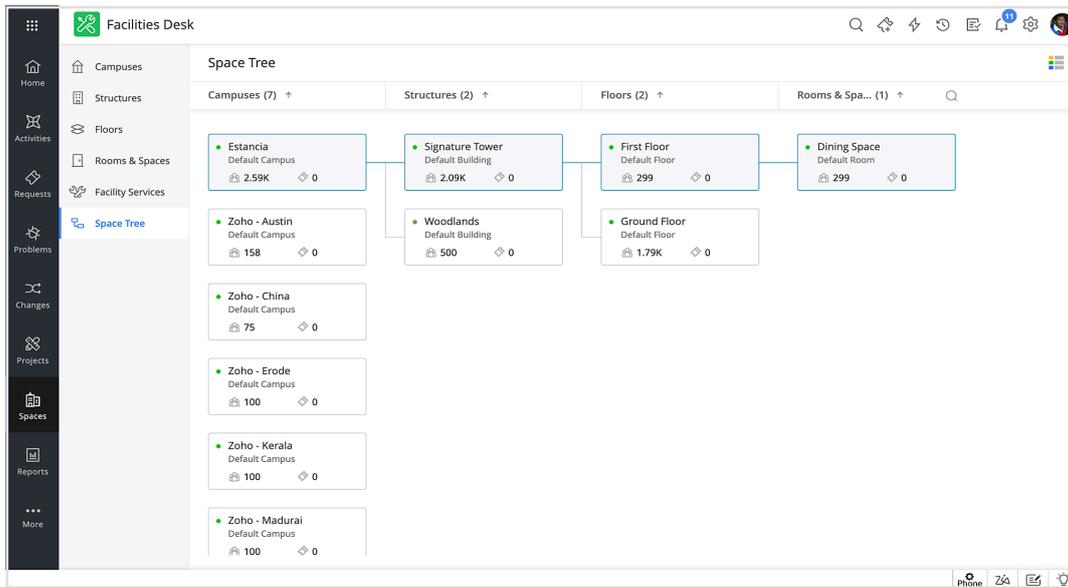


Image 4.12: Space management to visualize campus spaces, manage amenities, and optimize space utilization

Space management allows them to map services and amenities offered by the Facilities Department to individual spaces on their campuses. Once Jake's onboarding request arrives, the Facilities

technician associates the request to the workspace where Jake's team are based out of, after validating the occupancy rates.

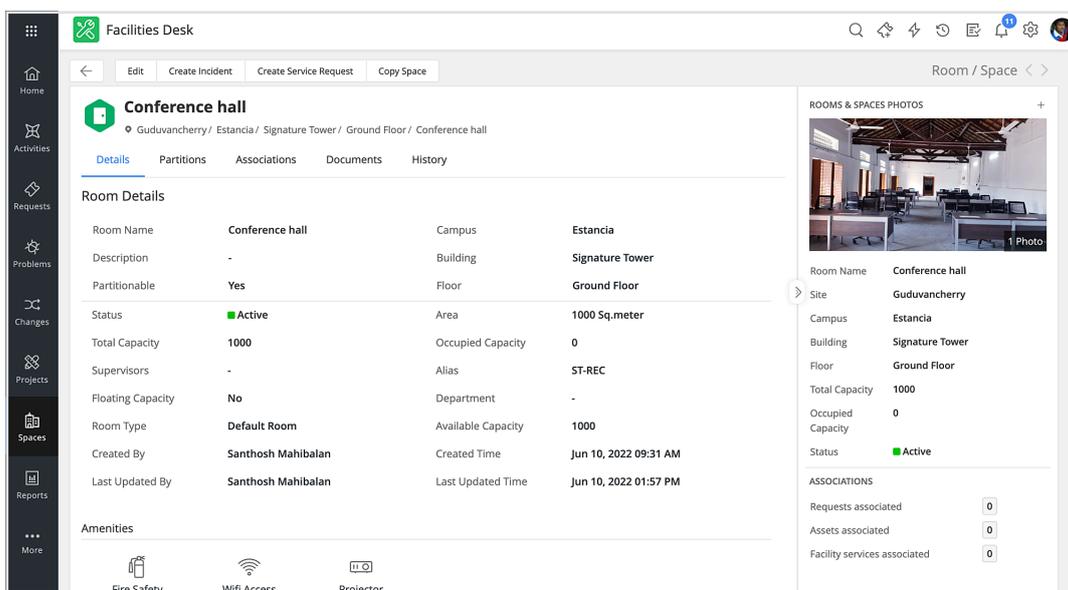


Image 4.13: Tracking occupancy rates and associating tickets to individual spaces

**Step 9:** While the IT and Facilities teams steamroll through the onboarding, the HR Department is also done, completing its own set of tasks such as helping create bank accounts, extending insurance cover, entering the new employee into the rolls, etc.

Zylker leverages low-code scripts and API to connect the service desk to HRMS and collaboration tools which accelerate the HR onboarding process for the new employee.

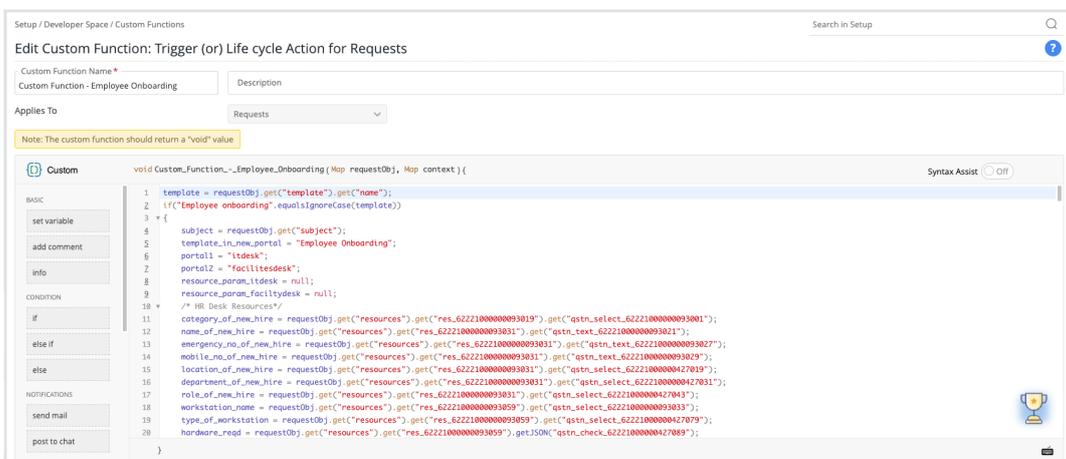


Image 4.14: Custom functions that bring low-code extensibility to the ITSM platform

Zylker's decision to move to a unified service management platform pays rich dividends as it brings a consistent standard of service delivery across the enterprise. With a repeatable blueprint spanning across departments and applications, Zylker now onboards dozens of employees simultaneously without a hitch.

As for Jake's newest team member?

His first touchpoint of the famed Zylker experience is excellent and he looks to deliver his best for a long time to come!

***If you think Zylker's onboarding framework may just be what you are looking for, here's an abridged workflow that you can implement in your organization!***

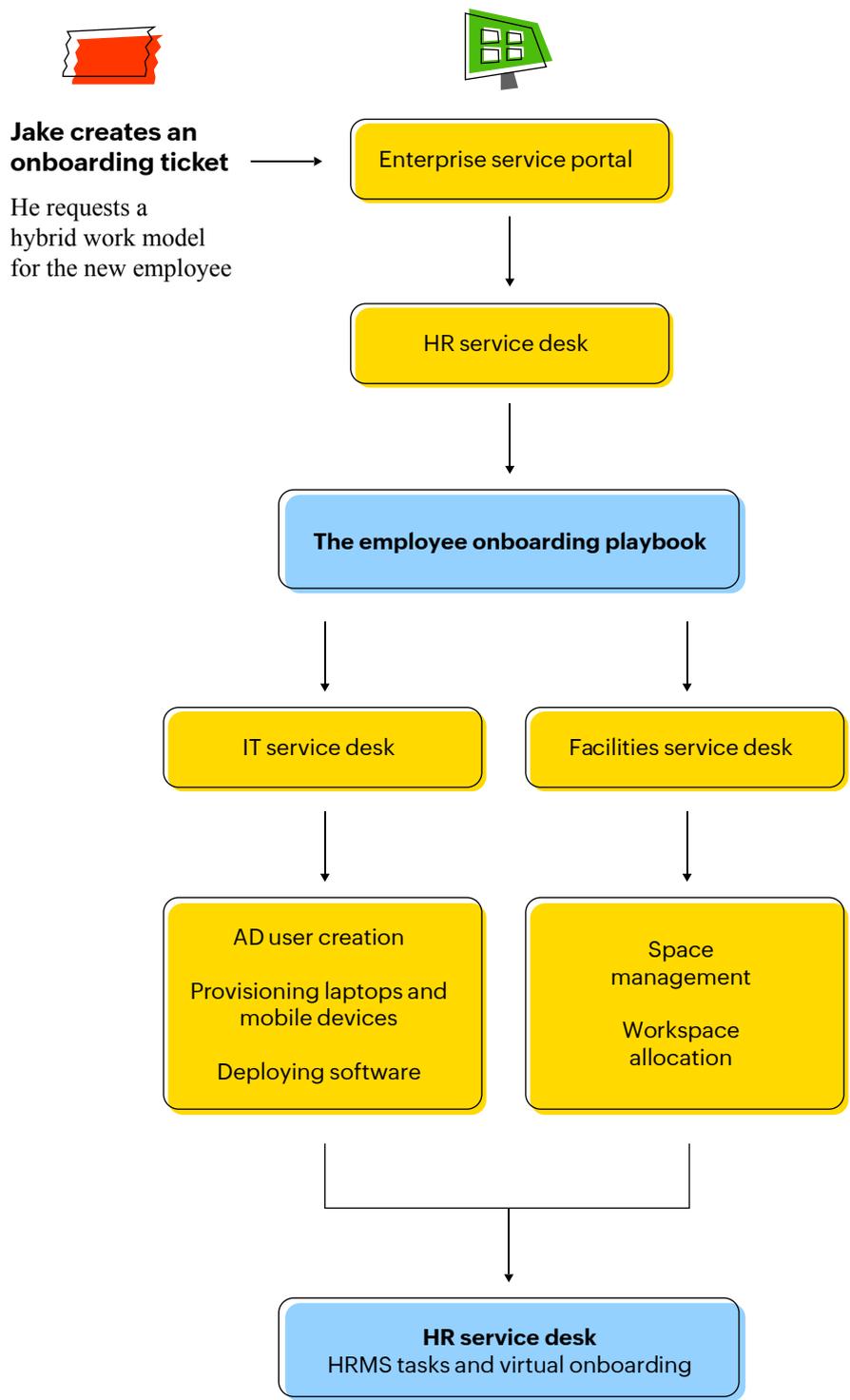


Image 4.15: Zylker's simplified employee onboarding workflow

CHAPTER 5

# Keeping the business ticking!



# Did you know??

**Formalized incident management (defined responders, severity levels, process, and tooling) remains a core attribute of tech-forward and high-performance organizations.**

Source: Forrester's *The State of Service Management, 2022 report*<sup>2</sup>



**2022:** It's been a year, and now Jake has moved to the azure (pun-intended) landscape of the Andaman and Nicobar islands! Some members of his team work out of exotic locations like him, some from the office, and others transition between work models.

They launch multiple features, earn accolades from their colleagues, and start to work on a new software project.

However, on the day of testing their first sprints, their VPN connection is abruptly terminated. Since their in-house testing environment is hosted on-premises, some of their remote developers

cannot access the tool, and their work stalls. While this is but a minor inconvenience for Jake and his team, another team is at its wits' end!

They are launching a major software patch the following day and they need the VPN up and running in another few hours.

The team decides to escalate the issue and create an urgent ticket. But, when they log into their self-service portal, they are already greeted with an announcement that declares that internal services are down and the IT team is actively working to resolve it.

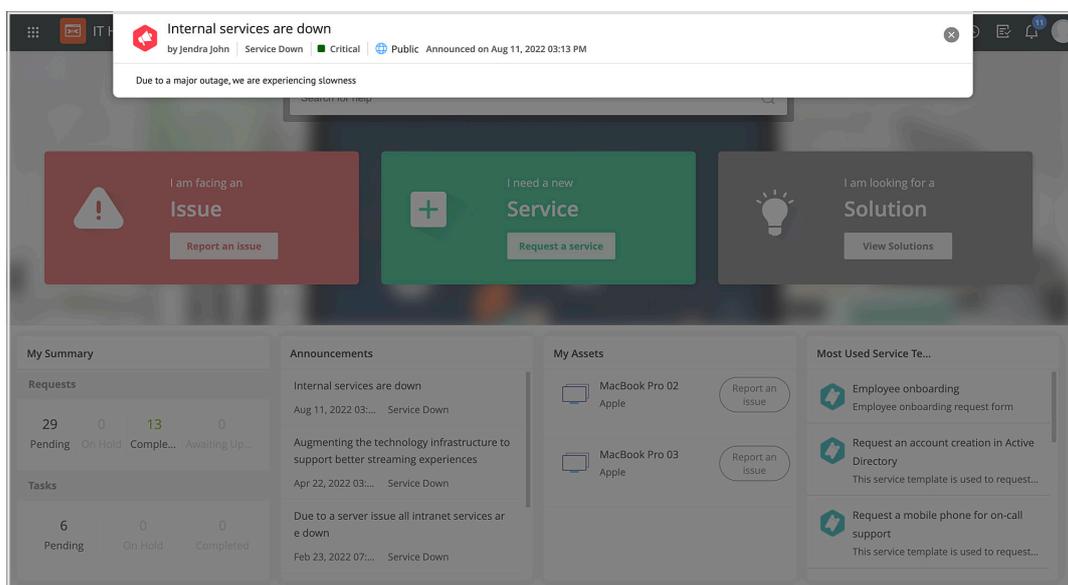


Image 5.1: Announcements in the self-service portal

What a surprise! Jake distinctly remembers what happened when an outage of this magnitude hit Zylker before the pandemic. It took hours for the IT team to communicate about the incident and a couple of days to get the affected servers up and running. The major outage resulted in monetary and reputational losses.

As minutes progress, the employees start to receive periodic updates within their all-hands Teams channel.

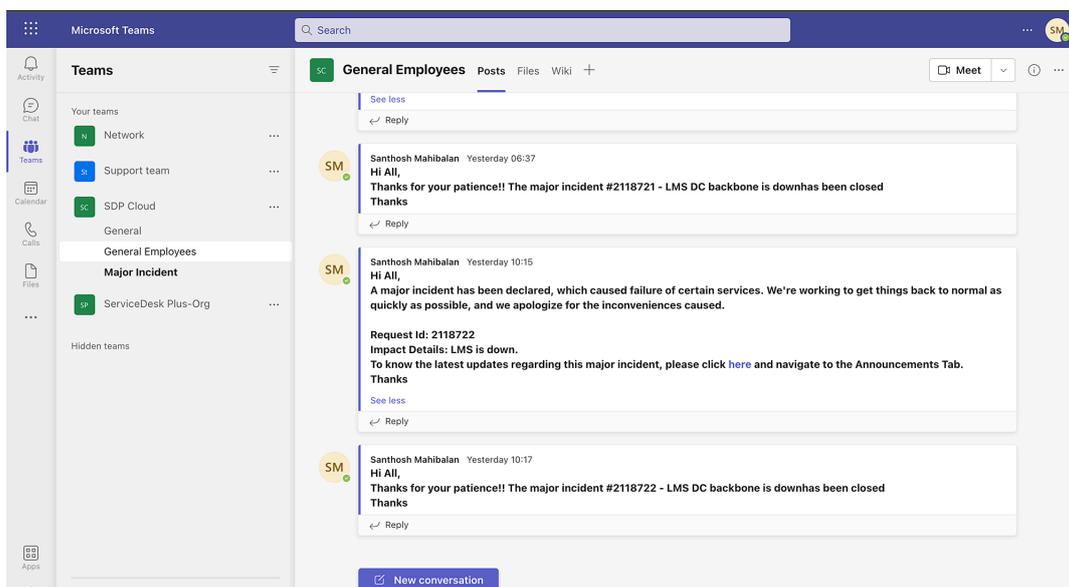


Image 5.2: Immediate alerts in the all-hands Teams channel

Team leads such as Jake and others, including the team poised for a software rollout the next day, are added to an incident response team (IRT) channel. They are briefed by the members of the IRT and other stakeholders about a DC-level outage at their HQ.

The IRT and NOC have identified the point of failure and accelerate incident response by kicking off their secure access protocols to access the datacenter. Once completed, their engineers will be on-site to take the systems back online.

Meanwhile, for teams involved in critical business tasks, the IT team prepares a migration to their secondary data center.

Phew! That was too fast. Jake and the others are taken aback! How did Zylker transition from snail-paced incident firefighting to a nimble, lightning-fast incident response plan?

## Here's Zylker's nine-step framework to success for incident management:

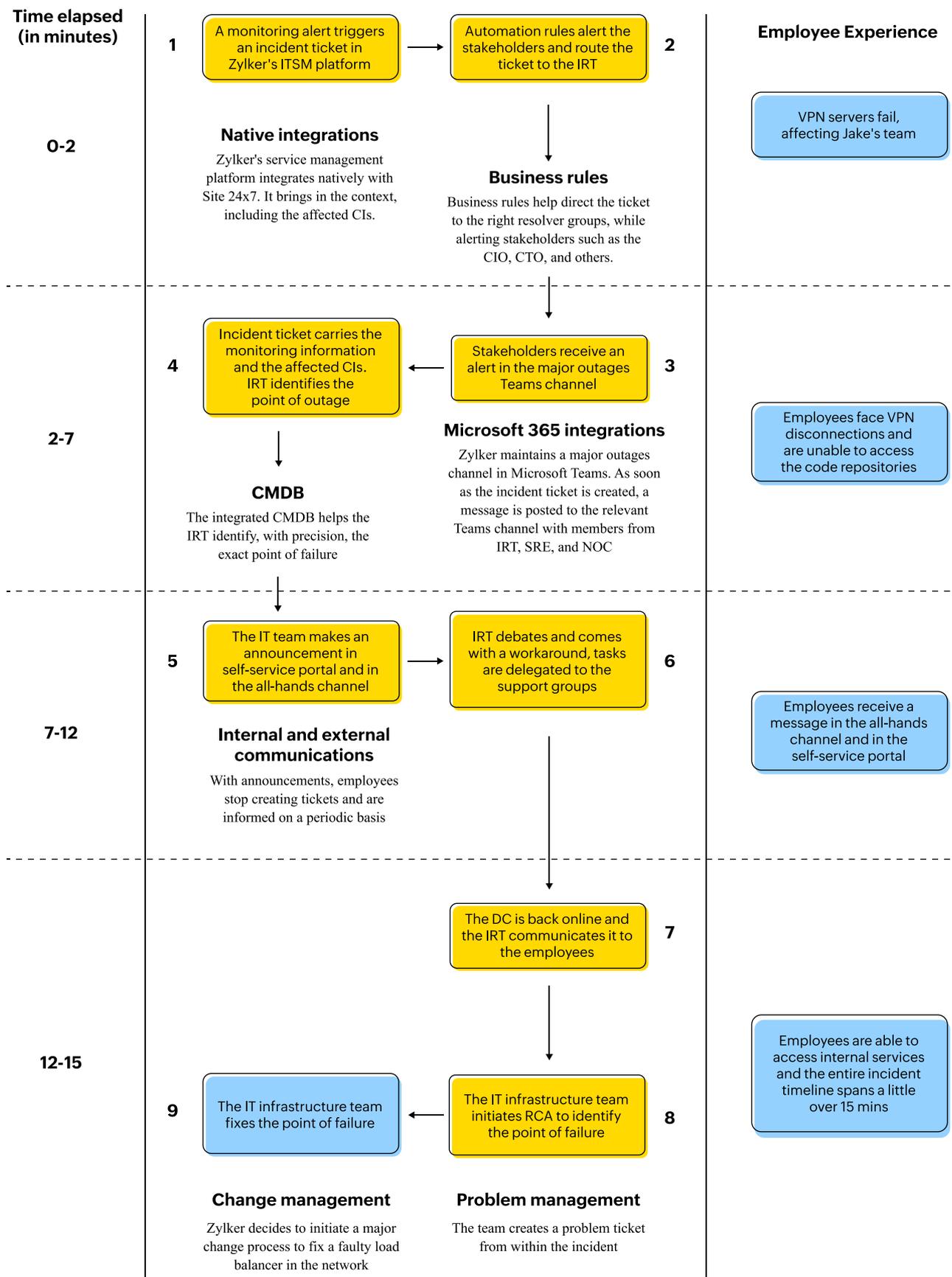


Image 5.3: The nine-step framework for incident management success

1. Native integrations with IT monitoring tools immediately convert the monitoring alert into an incident in the ITSM platform.
2. The incident is routed immediately to the IRT specializing in major incident management.
3. The major incident management playbook is embedded as a visual workflow within the platform.
4. Automations trigger alert messages into the IRT channel on Microsoft Teams.
5. Meanwhile, organization-wide announcements placate employees and prevent ticket duplication.
6. The integrated CMDB helps the IRT zero-in on the point of outage and deliberate with stakeholders for a quick workaround.
7. The IT infrastructure team deploys engineers on-site to take the systems back online.
8. Once the services are back up, the IRT initiates an RCA.
9. It rolls out a change to fix the faulty load-balancer.

An incident that appeared to threaten the entire business operation is remediated with an accelerated incident response that is orchestrated within a time span of 15 minutes.

The various engineering teams heave a sigh of relief and proceed to resume their work on software projects.

Jake is intrigued on how this whole incident tool-chain is built. He asks his friend in the IT department who shows him how the playbook is crafted within their ITSM platform.

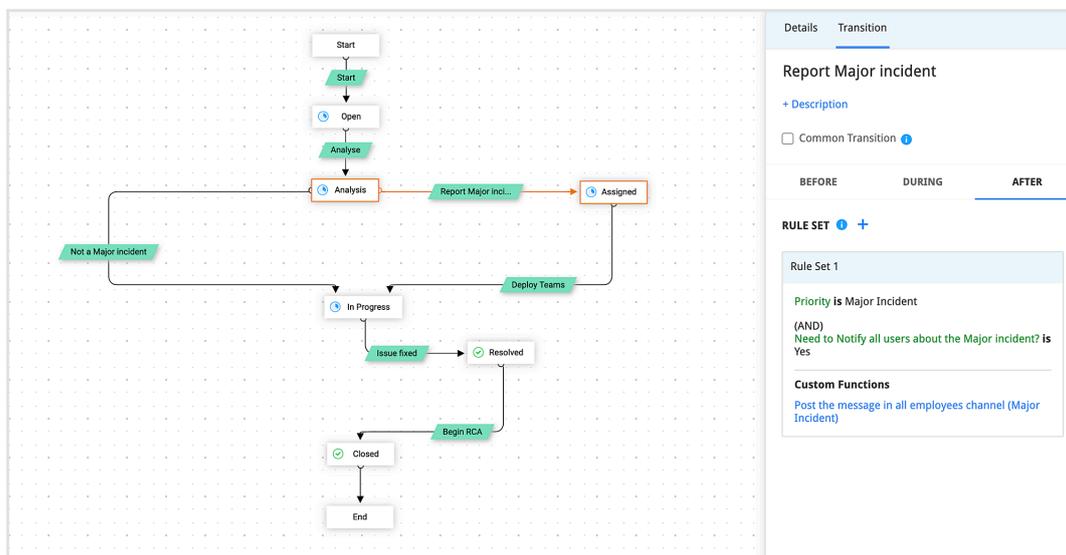


Image 5.4: A major incident response playbook visualized as a life cycle

Relying on an ITSM platform that is well-integrated into its IT management ecosystem helps Zylker orchestrate incident response workflows swiftly. The integrated CMDB helps with a quick impact analysis and a detailed investigation of the incident.

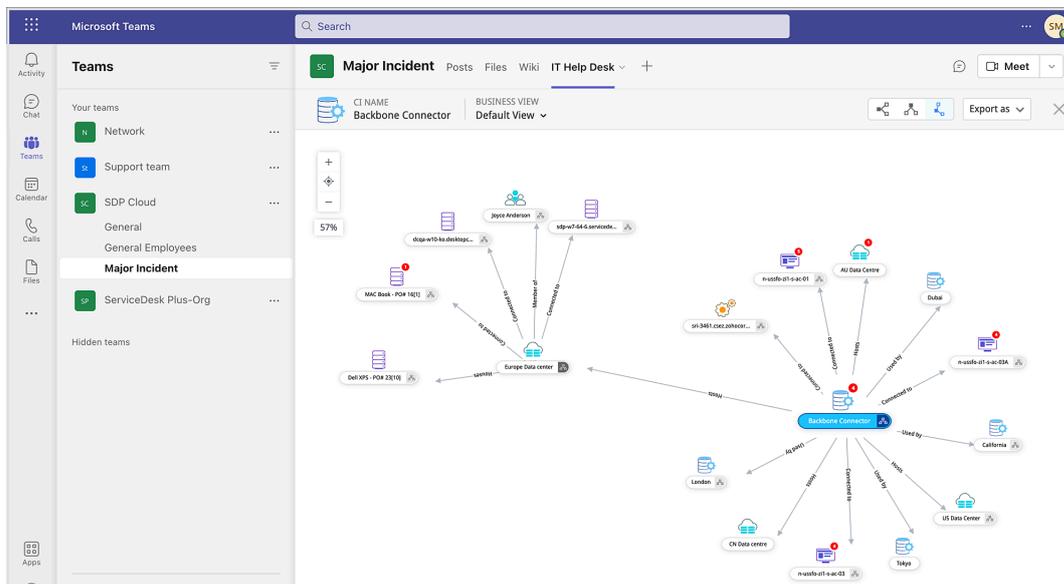


Image 5.5: A business view in the CMDB that is accessible from within Microsoft Teams

The business view map helped the IRT identify which services and teams were affected by the incident. That is how several teams in Zylker, including Jake’s, were identified and added to an exclusive channel to communicate the incident and its resolution.

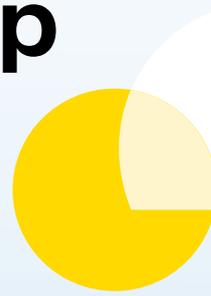
From IT operations management to security information, event management, and UEBA, Zylker has sorted out its monitoring landscape and placed the service management platform at the center of its IT operations.

Zylker is now equipped with dedicated, visual playbooks to handle the whole spectrum of major incidents ranging from server outages to DC blackouts, from insider threats and intrusions to malware attacks.

These incident management best practices, hoisted through a single IT console, have helped thousands of Zylker’s employees like Jake to go about their work without breaking into a sweat. It’s resulted in high-availability of services and contributed to an overall resilience of the IT environment.

CHAPTER 6

# Running a tight ship with hybrid ITAM



Did you know??

**Managing IT assets is the greatest remote IT support challenge for IT organizations during the pandemic.**

*Source: ManageEngine's "The state of ITSM two years into the pandemic" survey*



**2022:** Zylker's IT team has weathered many a storm by now, and the foundation of this resilient ITSM began with its ITAM strategy.

The criticality of IT asset management during the era of hybrid work can never be higher. ["The state of ITSM two years into the pandemic" survey](#) found that managing IT assets is the top challenge for IT teams in 2022. Moreover, since the onset of the pandemic, companies have increasingly procured mobile-capable IT assets to help employees work from anywhere.

While this corporate approach translates to work-life improvements for employees like Jake, who are now empowered with the right tools to get business done (even from the Himalayas), it's opened up Pandora's box for Zylker's IT team.

## 6.1 | The status quo, that was: Circa 2019

Before the pandemic, Zylker was attuned to a very traditional approach to IT asset management. Its IT Department relied on a disparate, standalone ITAM solution installed on its local network. The primary goal of this solution was to keep track of their hardware and software assets and prep themselves for IT audits.

Zylker also relied on a legacy Client Management Tool (CMT) to manage its numerous endpoints. The endpoints comprised mostly of desktops connected to the corporate network. The IT asset manager and the network manager were chiefly concerned about patching operating systems, deploying the right software to end-users, and securing the IT estate against threats.

But, this setup works only for an ITAM environment that is long gone.

## 6.2 | Stepping into a hybrid workspace

Zylker's IT now deals with a complex, hybrid IT estate with critical assets like servers, virtual machines, network components, and employee assets inside the office and a slew of mobile workstations provisioned to remote workers outside the office.

The IT department has several major challenges in dealing with this hybrid IT infrastructure:

1. Accounting for all their IT assets, including mobile devices.
2. Auditing the software run on these machines for compliance.
3. Securing these endpoints and monitoring them for a proactive incident response.
4. Keeping the IT asset inventory stocked up.
5. Identifying critical servers located on-premises and workstations off-premises.
6. Managing devices provisioned to contractors.

Let's see how Zylker engineers a best-practice ITAM framework to overcome these challenges and adopts a UEM solution that integrates into its ITSM platform.

## 6.3 | A sure-fire strategy!

Let's rewind and return in time just before Zylker was about to go remote.

A few days before Zylker adopts remote work, Divya, the IT asset manager at Zylker, decides that her team's first step is to discover and bring all IT assets connected to the corporate network into a single IT asset database.

She figures that by having the database within their ITSM platform, she and her team can connect incoming incident and service tickets to their relevant assets, easing IT operations.

Zylker relies on the ITSM platform's asset discovery probe, installed on the host server, to scan all the networks and domains in its headquarters. The IT team configures different probes for Zylker's various offices spread across the globe and scans all IT assets that are part of its portfolio.

Once complete, Zylker's asset inventory packs all the relevant information on workstations, servers, network components, and SNMP devices.

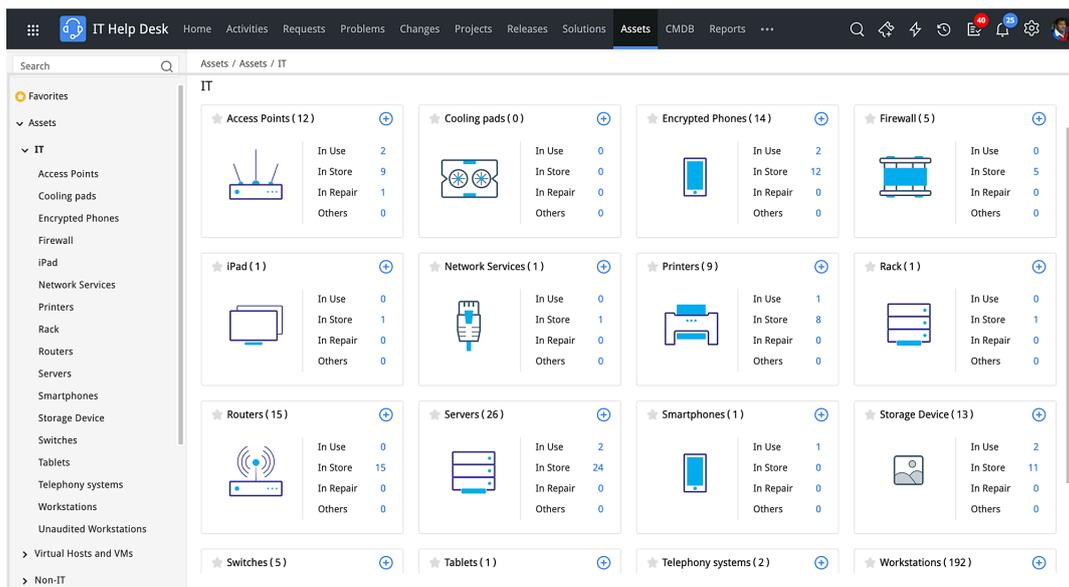


Image 6.1: The asset inventory in ServiceDesk Plus

The probe brings in every unit of information that is part of their IT estate, including the software installed on workstations. Now Divya and her team, meticulous as they are, realize that some employees may not be prudent when installing software.

Take Jake's workstation, for example! (Before the pandemic)

He installs a business intelligence (BI) software on his workstation but fails to notify his sysadmin or request a license. The vendor of this BI tool has a particular penchant for surprise software audits which may result in penalties if it detects non-compliance with software license agreements.

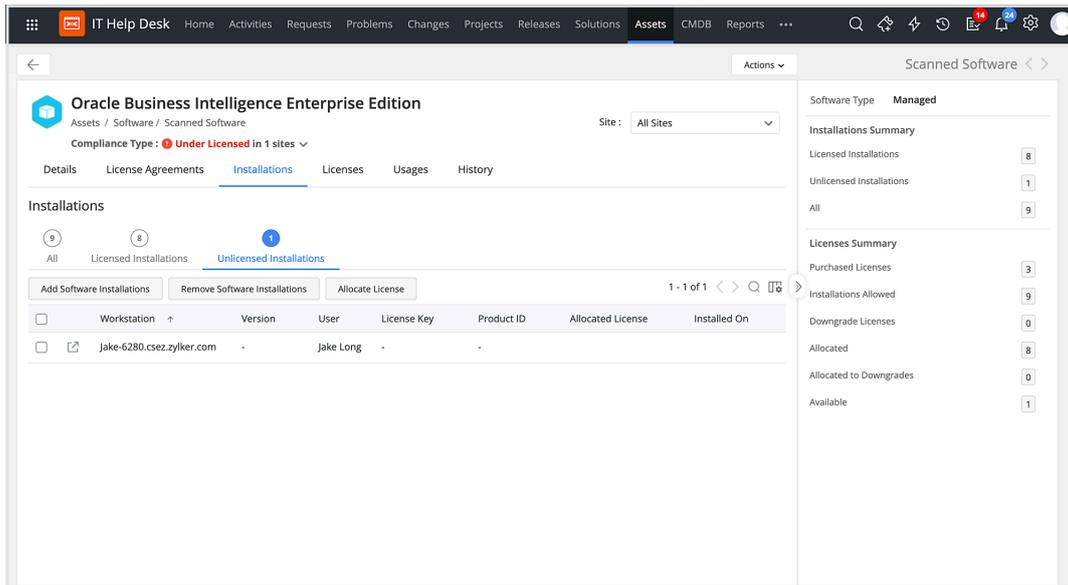


Image 6.2: Tracking license compliance for a BI software

Fortunately, Divya and her team, with their new ITSM platform, identify the license violation beforehand and allocate a license to Jake’s workstation.

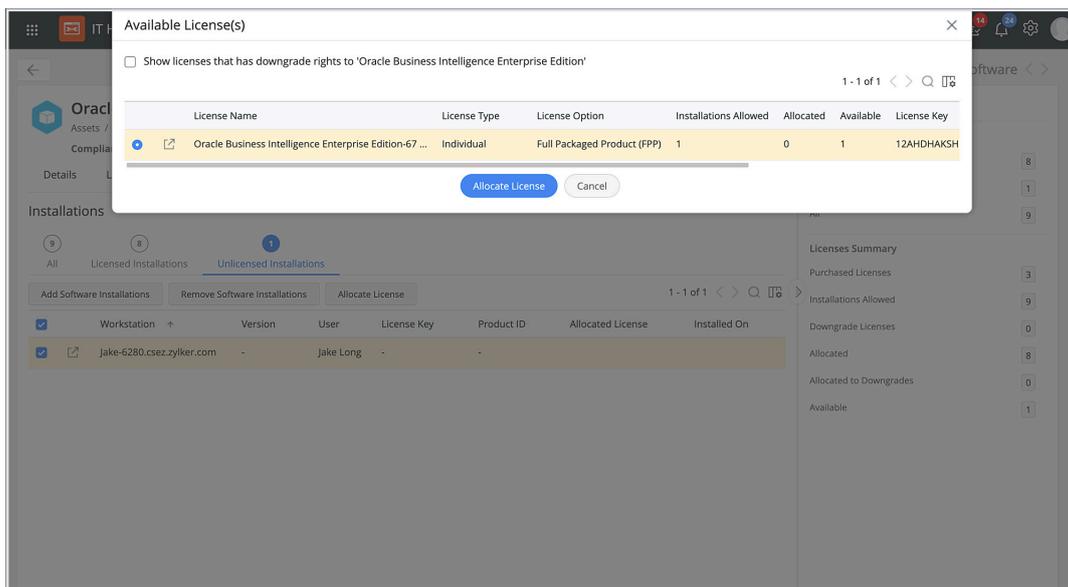


Image 6.3: Allocation of available licenses

The ability to stay on top of hardware specs and software licenses helps Zylker sail through IT audits. It can now identify all IT assets under its watch and even zero in on those workstations running prohibited software.

The team delivers top-notch IT support to Zylker’s hybrid workforce using the two-pronged remote control capability in its ITSM platform. IT technicians can use the local probe to remote control workstations connected to the LAN or rely on Zoho Assist to support remote workstations.

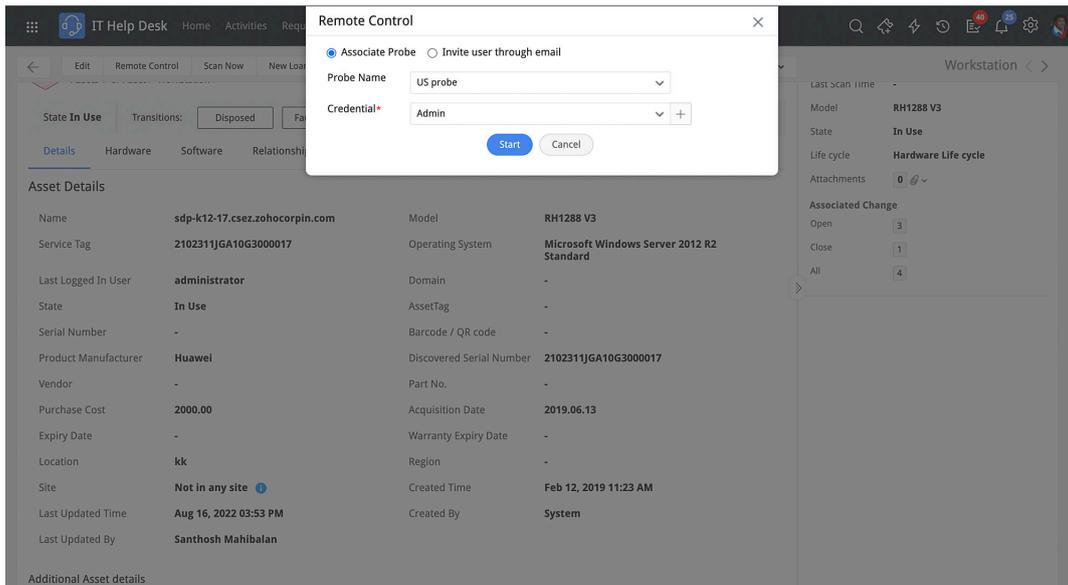


Image 6.4: Remote control of IT assets

The next step for Divya and her team is to ensure their asset inventory stays up-to-date and well-stocked to handle future demand. To replenish their IT asset store, the team configures automated alerts to technicians whenever the inventory levels for a particular product fall below a predefined threshold.

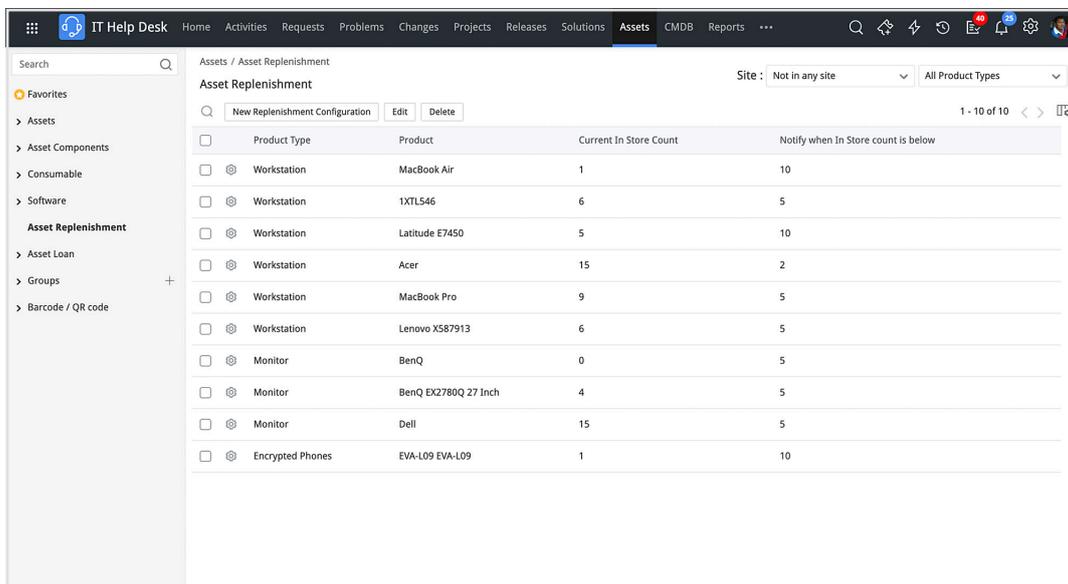


Image 6.5: Asset replenishment alerts help keep the inventory updated

Additionally, Zylker provisions IT assets to contractors who work for its digital marketing division. The IT team tracks these assets separately using a loan registry that comprises a gist of the IT asset, the period of the loan, and the loan expiry dates.

ID	Loaned Assets	Loaned to User	Loaned to Department	Site	From	To	Status	Expiry	Created By	Cre
5	1 Asset	Mary Bingham	Engineering	California	Aug 24, 2022	Aug 31, 2023	On Loan	In 367 days	Jendra John	Au
4	1 Asset	Frank	-	Not in any site	Jun 7, 2022	Jun 30, 2022	Expired	60 days ago	Jendra John	Jun
3	1 Asset	david@zillum.com	Administration	Not in any site	May 24, 2022	Jun 2, 2022	Expired	89 days ago	Jendra John	Ma
2	1 Asset	-	Administration	California	May 24, 2022	May 4, 2023	On Loan	In 247 days	Jendra John	Ma
1	2 Assets	david@zillum.com	Administration	Not in any site	May 24, 2022	May 12, 2023	On Loan	In 255 days	Jendra John	Ma

Image 6.6: Loan registry to track loanable assets to contractors

With this systematic organization of its IT estate, Divya’s team positions itself on a sure footing when it comes to IT inventory management.

### Here’s a snapshot of their sure-fire ITAM strategy

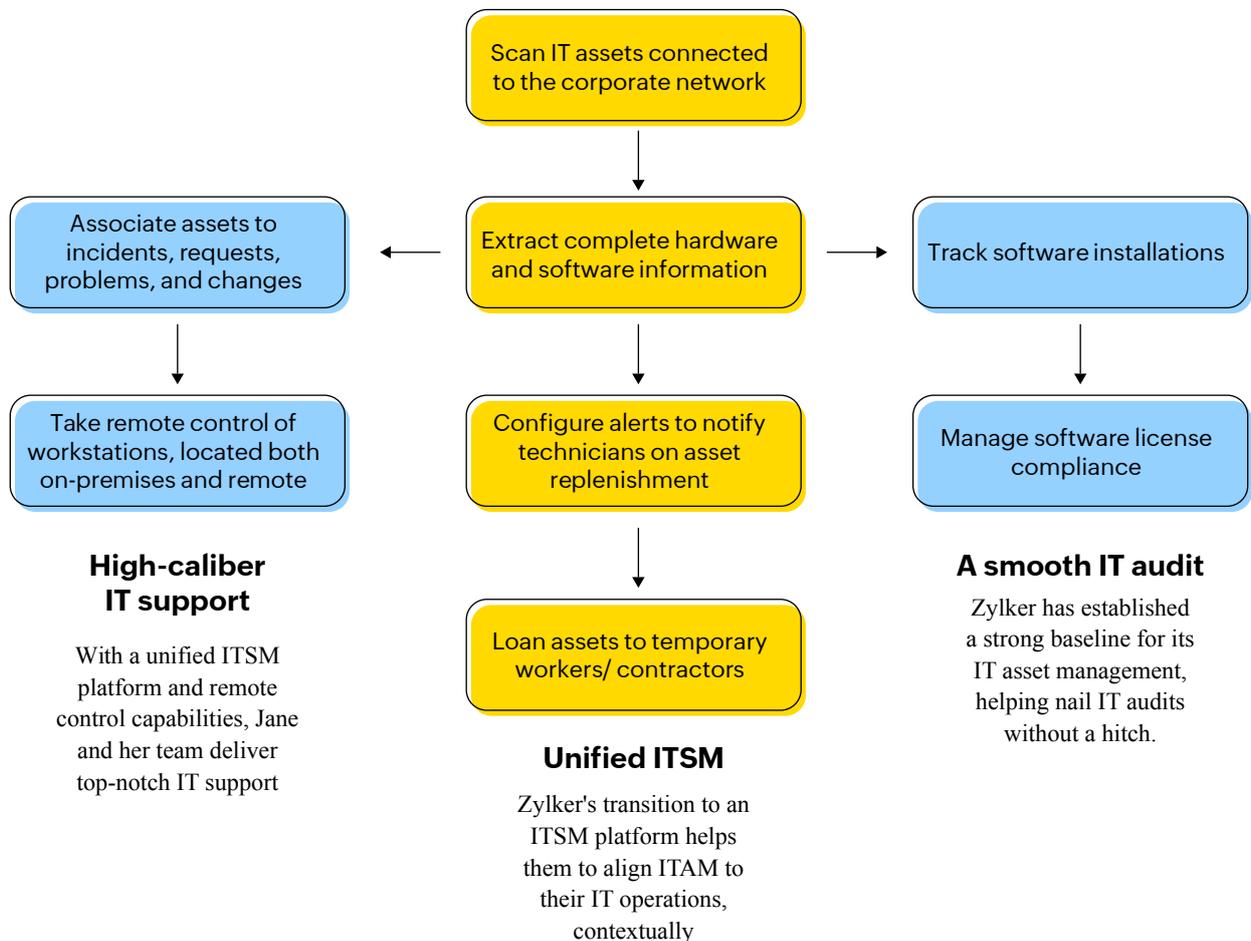


Image 6.7: Zylker’s hybrid ITAM framework

However, the task is not complete, as there will be assets moving out of the corporate network to remote locations. The IT team has to ensure that asset details of remote workstations stay up to date.

While the probe hosted on their corporate network cannot reach these remote workstations, the ServiceDesk Plus ITSM platform offers a unique technique to scan these remote assets periodically. Zylker uses a scan script that runs on these remote workstations, dispatching the hardware and software information to the ITSM platform in the cloud.

*To achieve a periodic scan of IT assets and augment Zylker's ITAM capabilities, Divya decides to bring another aspect of IT management into play with ITSM.*

## 6.4 | The ITSM and UEM synergy for hybrid IT

With thousands of folks like Jake on a free run with their workstations and mobile assets, installing the software of their liking with minimal oversight, Zylker needs an effective endpoint management strategy that plays well with its existing ITSM platform.

Divya's team zeroes in on a unified endpoint management solution that helps orchestrate asset management and security best practices from their ITSM platform.

The UEM solution offers the ability to package and push scripts to Zylker's workstations, apply OS patches and provision software, identify vulnerabilities, configure device profiles, and encrypt devices.

Divya's team pushes the scan script to approximately 2000 employee workstations through the UEM solution and sets up a recurring scan at periodic intervals. With these asset scans, Zylker's ITAM database always stays up to date, making IT governance and compliance a walk in the park.

Here's how the ITSM and UEM synergy plays out at Zylker:

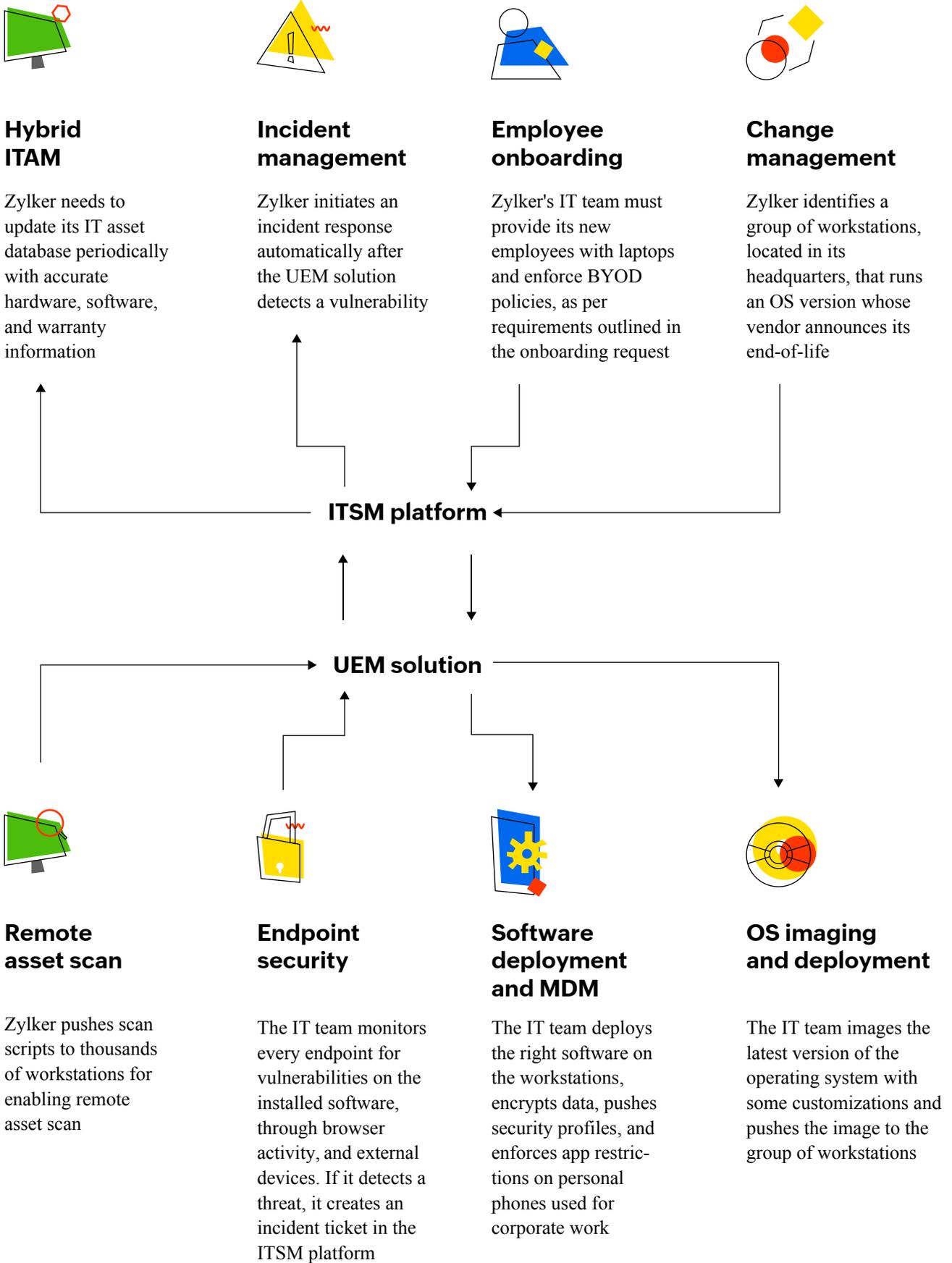
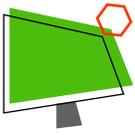


Image 6.8: Leveraging the synergy of ITSM and UEM



## Hybrid ITAM

- The remote scan of IT assets, enabled by UEM, helps Zylker with an accurate, single source of truth of its IT assets within its ITSM platform.
- The IT team also performs advanced remote control operations on its end-user devices using the UEM platform.



## Incident management

- Using its UEM, Zylker rolls out advanced endpoint security measures, including browser lockdown, app blacklisting/whitelisting, file access monitoring, vulnerability assessment, etc.
- If the UEM solution detects a known vulnerability in a workstation, it triggers an incident ticket in the ITSM platform, initiating an incident response playbook.



## Employee onboarding

- The IT team can perform tasks such as device hardening, encryption, device profile configurations, and software deployment from within the ITSM platform since it natively integrates into the UEM solution.
- With Zylker embracing the BYOD policy, they also bring employee mobile devices under management by implementing corporate app and data restrictions.



## Change management

- Zylker identifies workstations running operating systems that have reached EOL using dynamic, filter-based grouping on its ITSM platform.
- It then initiates an emergency change on the ITSM platform and upgrades the workstations with the latest OS image through the UEM solution.

CONCLUSION

# The path ahead for Zylker and ITSM



# Did you know??

**Organizations that still require most employees to work at home are more likely to take IT seriously.**

*Source: ManageEngine's "The state of ITSM two years into the pandemic" survey*



Jake has now returned to work at the headquarters of Zylker, and he is delighted to meet his team members in person after his work-cation! However, a sizable portion of Zylker's workforce continues to work remotely at some point, and its IT Department runs a smooth show to help them get business done.

The way enterprises work and conduct business faced a massive upheaval when the pandemic struck. However, IT teams around the globe

mounted an extraordinary response to sustain operational agility and are now steering their enterprises towards a successful hybrid work model.

IT organizations like Zylker's have come to reorient their traditional ITSM practices with modern ITSM platforms, which have helped to automate the routine, orchestrate IT-business workflows, and bring their IT management within a single pane of glass.

## What's next in Zylker's service management strategy?

Zylker has set its eyes on improving AI and ML-based initiatives such as virtual assistants and intelligent automations for technician assignment, categorization, and prioritization. Its ITSM platform, ManageEngine ServiceDesk Plus, offers a turnkey AI solution named Zia that can be trained on Zylker's service desk using data to predict various ticketing actions.

Zylker is planning on a pilot rollout of Zia before the end of 2022 and hopes to operationalize it as a mainstream IT technician on standby 24x7!

Zylker's IT department is also working to automate change and release management processes on its ITSM platform, and exploring hyperautomation of its ITSM to help technicians focus on strategic priorities and derive more business value from IT.

Zylker and Jake's service experience journeys move in tandem as service management maturity across the enterprise translates into exceptional employee experiences.

## About ManageEngine

As the IT management division of [Zoho Corporation](#), ManageEngine prioritizes flexible solutions that work for all businesses, regardless of size or budget.

ManageEngine crafts comprehensive IT management software with a focus on making your job easier. Our 120+ award-winning [products](#) and [free tools](#) cover everything your IT needs. From network and device management to security and service desk software, we're bringing IT together for an integrated, overarching approach to optimize your IT.

## About the author

Siddharth G is a product marketer at ManageEngine. He specializes in driving marketing campaigns and customer education programs for ManageEngine's flagship ITSM platform, ServiceDesk Plus. Over the past three years, Siddharth has hosted various masterclass and thought leadership webinars addressing specific ITSM challenges that organizations face and the best practices to overcome them. He has also authored educational guides on IT ticketing systems and service request management.

## About ServiceDesk Plus

[ServiceDesk Plus](#) is the unified service management platform from ManageEngine, the enterprise IT management division of Zoho Corporation. Built on industry-recommended ITSM best practices, ServiceDesk Plus comes packed with contextual IT and business integrations that help enterprise service desk teams better align with their organization's business objectives.

For more than 15 years, ServiceDesk Plus has provided solutions to millions of IT folks, end users, and stakeholders.

Did you know??

**Enterprises that invest in ServiceDesk Plus experience up to a 352% ROI over three years.**

*Source: Forrester's Total Economic Impact™ of ManageEngine ServiceDesk Plus*



ManageEngine, [The state of ITSM two years into the pandemic](#)  
Forrester Research, [Total Economic Impact™ of ManageEngine ServiceDesk Plus](#)  
Forrester Research, [The State of Service Management, 2022](#)