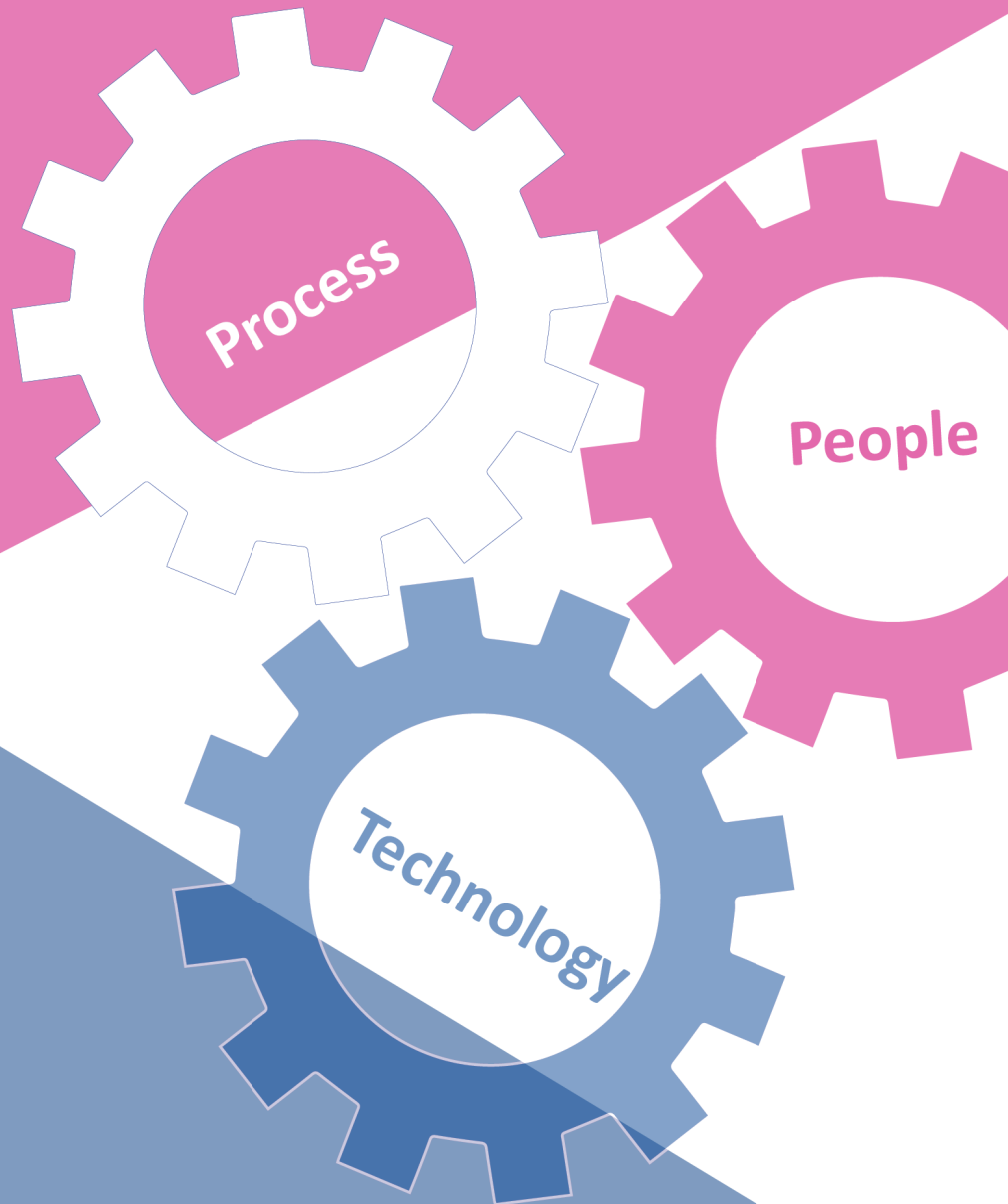




Service Request Catalogues Implementation Guidance



White Paper

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His knowledge of good practice is underpinned with expert accreditations in Service Management, Project Management, Programme Management and IT Governance. He has recently augmented his knowledge through the study of an Executive MBA with the University of Surrey in which he was awarded a distinction. The research project that formed the dissertation concerned the implementation of ITSM.

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Table of Contents

EDDIE POTTS	1
PETER HUBBARD	1
1. INTRODUCTION	1
1.1 BACKGROUND AND OBJECTIVE.....	1
1.2 METHODOLOGY.....	1
2 SERVICE REQUEST CATALOGUE OR SERVICE CATALOGUE?	2
3 THE BENEFITS AND RISKS OF SERVICE REQUEST CATALOGUES	4
4 SERVICE REQUEST CATALOGUES ARE OFTEN POORLY IMPLEMENTED!.....	7
5 COMMON THEMES.....	8
5.1 SERVICE REQUEST CATALOGUE - DESIGN.....	8
5.1.1 GADU - LEVERAGING THE MODEL IN PEOPLE HEADS	8
5.1.2 IMPLEMENT ROLES-BASED VIEWS.....	11
5.1.3 DO NOT EXPECT USERS TO UNDERSTAND ITIL®	11
5.2 SERVICE REQUEST CATALOGUE - BUILD.....	12
5.2.1 UNDERESTIMATING EFFORT REQUIRE IMPLEMENTING A SERVICE REQUEST CATALOGUE.....	12
5.3 SERVICE REQUEST CATALOGUE – IMPLEMENT	13
5.3.1 PHASE 1 – MINIMAL VIABLE PRODUCT	13
5.3.2 PLAN BIG, START SMALL – PHASE 2 AND BEYOND!	13
5.4 SERVICE REQUEST CATALOGUE – ADOPTION & OPERATION	14
5.4.1 RETIRING LEGACY INTAKE CHANNELS.....	14
5.4.2 MANAGING COSTS, PRICES AND USAGE	14
5.4.3 SERVICE LEVEL TARGETS.....	15
5.4.4 USER COMMUNICATION	15

1. Introduction

1.1 Background and objective

Pink Elephant have extensive experience in assisting internal Service Providers with the selection, implementation, review of Service Request Catalogues. Common themes have become apparent during such engagements, and the purpose of this paper is to document, and share knowledge with organisations seeking to implement Service Request Catalogues and the Service Management community

1.2 Methodology

This paper is based upon the experiences gained by our Service Management consultants. The basis of its contents has been validated with practitioners at various industry events across the United Kingdom, Europe, South Africa, United States and of course the Internet.

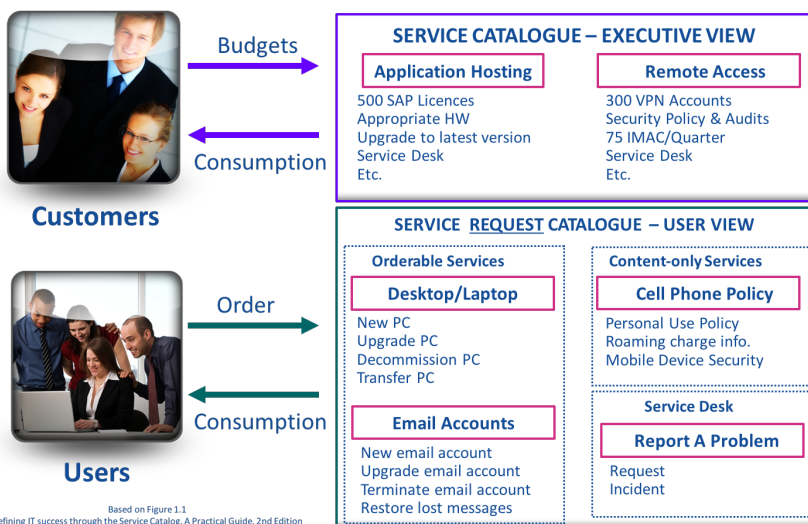
2 Service Request Catalogue or Service Catalogue?

The term Service Catalogue is commonly misused and can lead to confusion. Often the term is incorrectly used to describe a User Self-Service Portal, which is also colloquially termed as a Service Request Catalogue.

ITIL® best practice defines the following terms:

- **Service Catalogue:** A database or structured document with information about all live IT services, including those available for deployment. The Service Catalogue is part of the Service Portfolio and contains information about two types of IT service: customer-facing services that are visible to the business; and supporting services required by the service provider to deliver customer-facing services.
- **Service Request:** A formal request from a User for something to be provided – for example, a request for information or advice; to reset a password; or to install a workstation for a new User. Service Requests are managed by the Request Fulfilment process, usually in conjunction with the Service Desk. Service requests may be linked to a Request for Change as part of fulfilling the request.
- **Request Fulfilment:** The purpose of the process is to manage the lifecycle of all service requests. The objective of the process is to:
 - Source and deliver the components of requested standard services (e.g.), i.e. Service Requests such as the provision of standard desk top and software
 - To provide a channel for Users to request and receive standard services for which a predefined approval and qualification process exists

A Service Catalogue and Service Request Catalogue is depicted in Figure 1.



Based on Figure 1.1
Defining IT success through the Service Catalog, A Practical Guide, 2nd Edition

Figure 1

However, the term Service Request Catalogue is not documented or defined within the ITIL[®] framework, despite it being in wide currency. The ITIL[®] framework alludes to Service Review Catalogues in its description of the purpose of Request Fulfilment i.e.

- “To provide a channel for Users to request and receive standard services for which a predefined approval and qualification process exists”

In practice the channel referred to, is the Service Request Catalogue which simply lists what requests can be made for your services. Note that the ITIL[®] Framework does also refer to “Self-help web interfaces” that can be construed as basic Service Request Catalogues

In the absence of a clear definition, the terms ‘Service Catalogue’ and ‘Service Request Catalogue’ are confused. Our experience informs us that when organisations state that they require a Service Catalogue, stakeholders are likely to have different interpretations of the term and what it is they need or require. So, the key question that stakeholders need to ask themselves is

“Is it a Service Catalogue, or a Service Request Catalogue that we require?”

The situation is not helped by ITSM Tool Vendors who refer to their Service Request Catalogue as a Service Catalogue. This also causes confusion for organisations seeking to understand the capabilities of Tool Sets. Typically, when ITSM tool vendors refer to a Service Catalogue they are referring to the Self-Service Request Fulfilment modules within their products. However, help is at hand for organisations seeking objective guidance as to the capabilities of such toolsets in the form of complementary services such as [PinkVERIFY](#). PinkVERIFY enables ITSM tool vendors and service providers to demonstrate and certify their product’s compatibility with ITIL Best Practice. A listing of products, and the processes that they are certified against, is [freely available](#).

3 The benefits and risks of Service Request Catalogues

A successfully defined, implemented and managed Service Request Catalogue offers major benefits for the business, User and IT department.

Service Request Catalogues, together with supporting lean Request Fulfilment processes, offer significant improvements such as

- Reduced cost
- Improved responsiveness (of the IT department)
- Improved compliance and governance
- Improved customer satisfaction

This is achieved through:

- The centralisation, standardisation and automation of Service Requests
- Better allocation of resources to effectively meet business demand
- The empowering of Users as solutions are “shifted left” to the User

Service Request Catalogues are highly visible to Users and customers. Along with the Service Desk, the Service Request Catalogue becomes the face of IT. However, this can be a double-edged sword, as perceived shortfalls are equally visible. Users requesting a seemingly simple request such as a “request for a new lap top” are unlikely to be aware of the work required behind the scenes to fulfil it. Furthermore, Users may unreasonably, albeit subconsciously compare the levels of service provided by their humble IT department to that of organisations that have access to massive capabilities and resources such as Amazon and Dell.

Service Request Catalogues are easier and quicker to implement compared to other areas of the IT Infrastructure Library (ITIL®) framework. Their implementation can be used as air cover for longer-duration, less visible back office IT projects. However, as we will discuss, whilst Service Request Catalogues appear to be simple, care and consideration is required to ensure their successful implementation.

3.1 Quantified business benefits

Service Request Catalogues can be used a variety of scenarios such as:

1. A User / Requester Service Request Catalogue
2. An IT-to-IT Service Request Catalogue
3. An External Client Service Request Catalogue

Case studies of each scenario that have realised quantified business benefits include the following examples:

3.1.1 A User / Requester Service Request Catalogue

This example concerns the IT department of a FTSE 500 Financial Service Firm.

The reputation of the IT department was suffering as there were multiple entry points, manual validation and “shepherding” for the fulfilment of service request. In response, the IT Department deployed a Service Request Catalogue as the single point of entry for all Service Requests, together with lean Request Fulfilment process.

Payback was realised in less than 34 weeks through the elimination of shepherding time and the retiring legacy request channels, and demonstrated the following benefits:

- With self-service, calls to the service desk central support team were reduced by 50%.
- The Service Request Catalogue extended to 700+ service items within first year, expansion to security, HR, and other non-IT areas
- The Service Request Catalogue compliance and governance for Sarbanes Oxley and IEC/ISO 20000
- A quick win for IT, with greatly improved User satisfaction: “One of the best things IT has ever done”

3.1.2 An IT-to-IT Service Request Catalogue

This example concerns the IT department of a FTSE 500 Financial Service Firm

The IT department had an inefficient server build process, with each build being a one-off each time. This incurred unnecessary expense and delay to provision servers and host business applications

A Service Request Catalogue for all IT services was deployed, including End-User computing and IT-to-IT data centre services. IT-to IT services were defined in a standard and readily available form, clearly identifying what was included and what was optional (at an additional cost)

By moving to standardised server images, the organisation saved \$1M in the server build process and reduced the delivery time from their outsourcer from 26 weeks to 4 weeks
The company achieved millions of dollars of further savings after they uncovered the fact that they were double-paying their outsourcer for imaging services that were already covered in the base cost of the hardware/software

3.1.3 An External Client Service Request Catalogue

This example concerns a Global IT Outsourcer & Manufacturing Company leader with an IT consulting, system integration, and IT infrastructure outsourcing business.

The organisation deployed Service Request Catalogue for communicating standardised services and enabling more cost-effective Self-Service Request management. This enabled the following benefits

- It gave their IT outsourcing business a distinct competitive advantage
- It enabled them to implement ITIL v3 conformant processes



- It achieved greater end User satisfaction for existing clients and helped them to win new contracts
- The Service Request Catalogue was a significant factor in winning more than \$120 million in new business in 2008

4 Service Request Catalogues are often poorly implemented!

Whilst Service Request Catalogues and Request Fulfilment can offer Service Providers significant benefits, in practice, particularly in internal Service Providers, they are often poorly defined, implemented, managed and ultimately underutilised.

This is demonstrated in the graph in **Error! Reference source not found.** Figure 2 that illustrates the calls received by the Service Desk of the internal Service Provider raised by each channel.

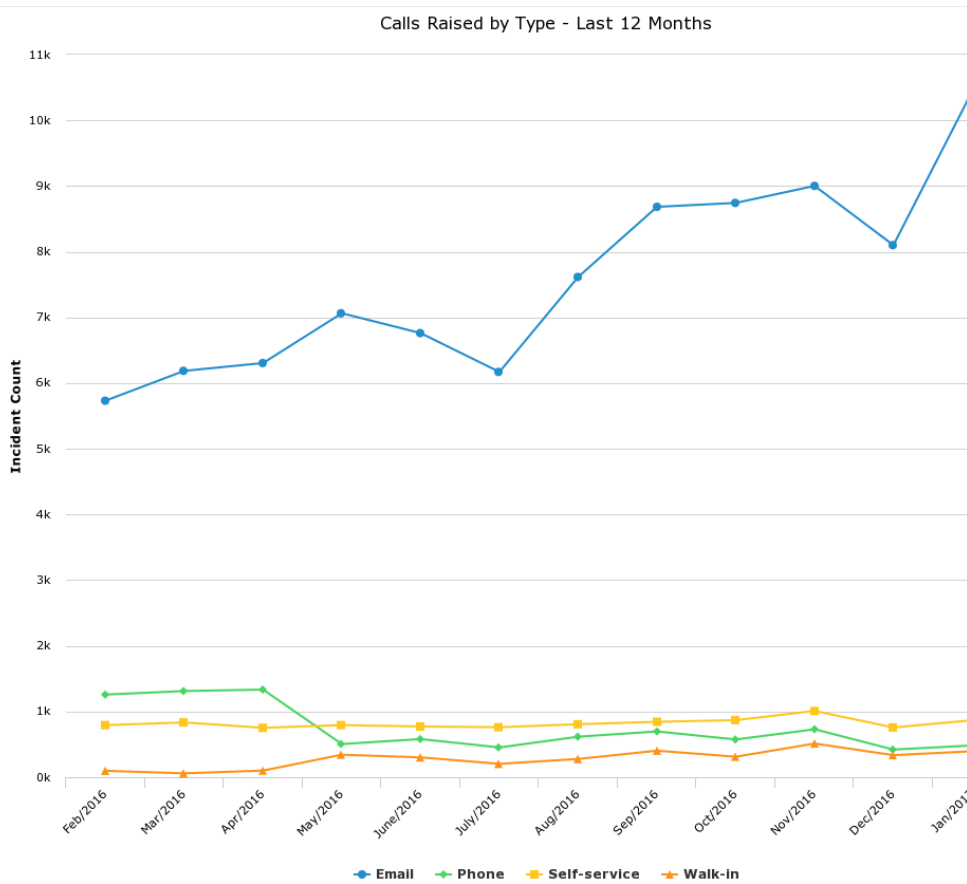


Figure 2

Ironically, the company has a very good online presence i.e. an excellent and very successful external client Service Request Catalogue. However, what is of more significance is that the numbers are not untypical of many organisations

5 Common Themes

This section discusses common themes that organisations should be thoughtful about when implementing Service Request Catalogues.

5.1 Service Request Catalogue - Design

5.1.1 GADU - Leveraging the model in people heads

Ordering products and services over the Internet is instinctive to most Users. Over the last 5, 10, 15 years' people's minds have been programmed through accessing popular online services such as Google, Amazon, Dell and UPS. The GADU model is effectively a model in User's heads that is reinforced every time they go on line.

Successful Service Request Catalogues seek to leverage this model, and consideration should be given to it, in the Service Requests Catalogues design.

5.1.1.1 Google

Ensure that your Service Request Catalogue will enables Users "to search like GOOGLE does", because "everyone is used to the idea that you can search like Google does". This mean enabling Users to search in simple language and not requiring the use of Boolean logic.

5.1.1.2 Amazon

Descriptions should be written in business language - ITIL terminology and "IT speak" should be avoided.

Ensure that your Service Request Catalogue is well marketed, and easy to use like Amazon. Services should be named at the most granular level such as "Adobe Photoshop – Upgrade" to enable searching and "one-click" ordering

An internal service provider implemented a "Buy-It-Now" button on their Service Request Catalogue akin to the option on Amazon.com. This simplified the User experience and was well received. Subsequently a second "Are-You-Sure" button was introduced as part of an initiative to manage demand. However, most Users did not see the second button, as they had assumed that their order was complete after they had selected the "Buy-It-Now" option as would be the case with Amazon. Therefore, the volume of requests went down and the level of customer dissatisfaction rose significantly.

Research has shown that Users have an "8 second tolerance", i.e. if they cannot find what they want within 8 seconds they will go elsewhere. In the case of a typical IT Department this means that if they cannot readily find what they want they will use legacy channels such the Service Desk or Email to get what they want.

Similarly, Users have a tolerance concerning the number of clicks they have to make before they give up. Sites such as Amazon are effective in enabling Users to order products and services in the minimal number of clicks as illustrated in the figures below.

Click #1:
 "Computers & Office -> Software"



Figure 3

Click #2:
 "Professional Design"

Featured Categories



- Business & Home Office**
- Office Suites
 - Business Accounting
 - Personal Finance
 - All Business Center
 - Document Management
 - All Business & Home Office



- Photo, Media & Design**
- Photo Editing
 - Video & Music Editing
 - CD & DVD Burning
 - Desktop Publishing
 - Professional Design
 - Web Development

Figure 4

Click #3:
 "Adobe Photoshop"

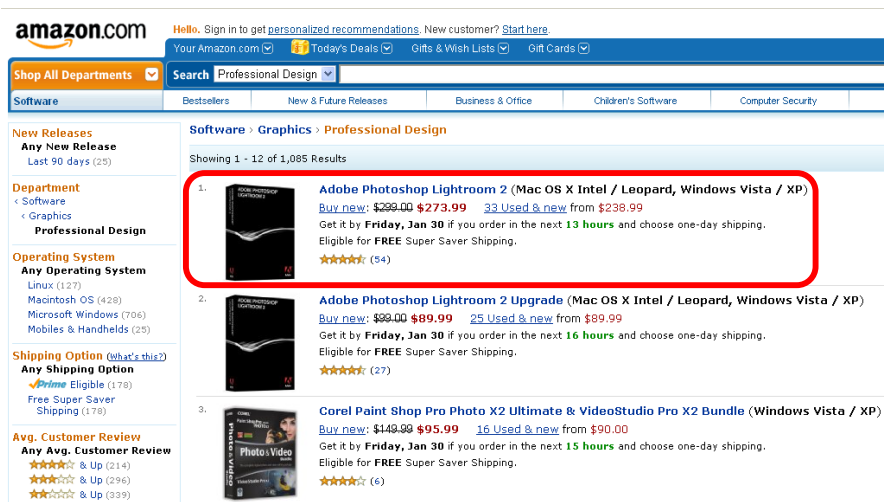


Figure 5

Click #4: Order it!



Figure 6

The GADU model also determines that Users increasingly expect Service Request Catalogues to be intelligent, and can manage human frailties such as their inability, or reluctance to spell correctly as depicted in Figure 7.

Showing results using some of your search terms

"adobe upgrade" (See all 236 results)

1.



Adobe Photoshop Lightroom 2 Upgrade (Aug 15, 2008)

Buy new: ~~\$99.00~~ **\$89.99**

25 Used & new from **\$89.99**

Get it by **Friday, Jan 30** if you order in the next **16 hours** and choose one-day shipping.

Eligible for **FREE** Super Saver Shipping.

★★★★★ (27)

Figure 7

5.1.1.3 Dell

Ensure that your Service Request Catalogue Users can bundle and configure products and services. For example, enabling Users to bundle services in one Service Request type e.g. "mobile User equipment" as opposed to them having to raise separate requests for individual related items such as laptop, software, mouse, laptop bag, etc.

5.1.1.4 United Parcel Service (UPS)

Ensure that your Service Request Catalogue and supporting Request Fulfilment processes provides Users with timely and accurate online status and order tracking like UPS or the Royal Mail. Users are increasingly self-sufficient, and accustomed to going online to find out “what is happening with...”. Enabling Users to become more self-sufficient is a major benefit to both the User and Service Provider and often underpins a Service Providers “shift-left” strategy

The importance of the effective management and client communication of Service Requests cannot be overstated. However, it is an area that Service Providers are frequently and have long been deficient in, as exemplified in Figure 11. Furthermore, such examples should serve to remind us that the Service Request Catalogue itself is just the tip of the iceberg.

5.1.2 Implement roles-based views

The Service Request Catalogue is the gateway to everything IT offers, however not everything that IT offers is available to all! This can lead to Users being presented with irrelevant information, which costs time and potentially mismanaged expectations as to what they are entitled to. Role based Service Request Catalogues as illustrated in Figure 8 are useful to managing this risk. They can ensure Users view only what is pertinent to them, thus simplifying and improving the User experience.



Figure 8

5.1.3 Do not expect Users to understand ITIL®

Terminology in Service Request Catalogues is sometimes expressed in ITIL® terms such as Service Requests, Incidents, Problems and Changes. This often causes confusion to Users who may not know, not care and should have to worry about ITIL language.

5.2 Service Request Catalogue - Build

5.2.1 Underestimating the effort required implementing a Service Request Catalogue

Request fulfilment is very simple, but simple is not always the same as easy!

A Service Request Catalogue represents the tip of the iceberg that is visible to the Users. However, for each Service Request type, effort is required to define the Request Model that is necessary to be able to fulfil the request.

A Request Model is a repeatable way of dealing with a category of Service Request. A Request Model defines the specific agreed steps, responsibilities, times scales and thresholds and escalation procedures that will be followed for a Service Request of this category as depicted in Figure 9.

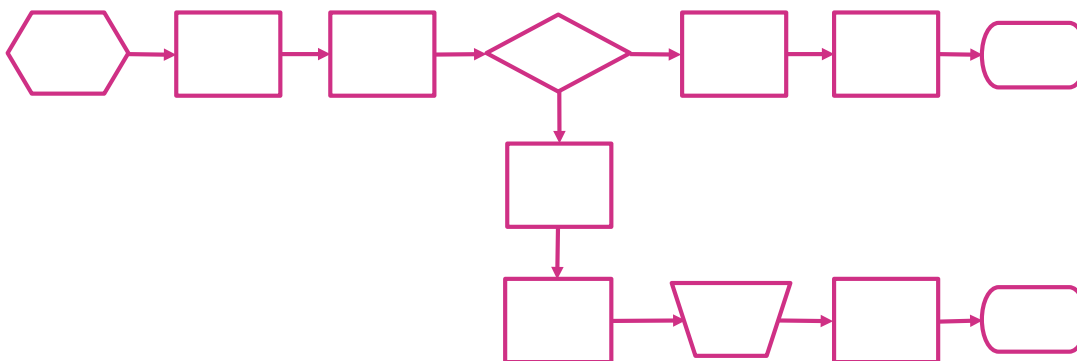


Figure 9

Request models may be very simple, with no requirement for authorisation such as a password reset or may be more complex with many steps that require authorisation such as joiners, movers and leaver requests.

For planning purposes, we estimate that for each Request Model, it takes

- Half a day to map the model
- Half a day to document and agree the module
- Half a day to configure the ITSM tooling

Service Requests Catalogues initially may contain dozens and ultimately hundreds of Service Request types. Given that that multiple people may be required to define and implement each Service Request type, significant time is required to implement a Service Request Catalogue. This is often underestimated

5.3 Service Request Catalogue – Implement

5.3.1 Phase 1 – Minimal Viable Product

Organisations often seek to implement a comprehensive and complete catalogue from Day 1. There may be a perceived need to make it comprehensive from the outset. However, this can lead to the catalogues launch being continually delayed and ultimately impede its adoption. This underpins stakeholder's cynicism that projects will work or ever deliver anything real or meaningful. So, having a quick hit phase 1 can be a huge win.

Asking Users to utilise the Service Catalogue represents a change to working practice to them. A form of organisational change that people often struggle to adapt to. There is a perception in many organisations that Users will receive a quicker service by using more trusted channels such as telephone, email or walk by. Therefore, it is critical that Users have a compelling reason to use the Service Catalogue and first impressions count!

It is strongly advisable to start by implementing a sufficient number of simple, i.e. those that require a minimal workflow, but high-volume Service Requests types. Therefore, at its launch the Service Request Catalogue is a minimal viable product, that is able to earn trust and generate enough Service Request volume to be able to evaluate and improve self-service forms, workflows, and the fulfilment process.

5.3.2 Plan big, start small – Phase 2 and beyond!

Implementing a Service Request Catalogue should be an iterative process. Organisations should adopt for an Agile approach with frequent releases, to capture the value from self-service request fulfilment.

Phase II can focus on enhancing the workflow, adding integration to improve customer and fulfilment team performance and adding additional services. Once you have interest and trust, you win permission to implement more sophisticated and larger catalogues. Organisations often face pressure to add Service Request types such as Joiners, Movers and Leavers to the Service Catalogue at its launch. However, the Request Models for these Service Request types are notoriously complex and should be implemented in later faces when trust has been earned!

When organisation implement Service Request Catalogues, often it is the first time that Request Models have been formally defined, documented and agreed. This provides an opportunity to review the efficiency of each model to ensure they are coherent and lean. However, such opportunities are often not taken in organisations haste to implement the Service Request Catalogue, and wasteful Request Models are implemented as a consequence.

It should also be recognised that whilst the origin of Service Requests concerned requests for IT Services, increasingly they are being used as channels for Users to request non-IT services as illustrated in Figure 10. The chart shows the results of a 2016 survey conducted by the HDI to determine which functional areas from respondent's organisation made use of the Service Catalogue.

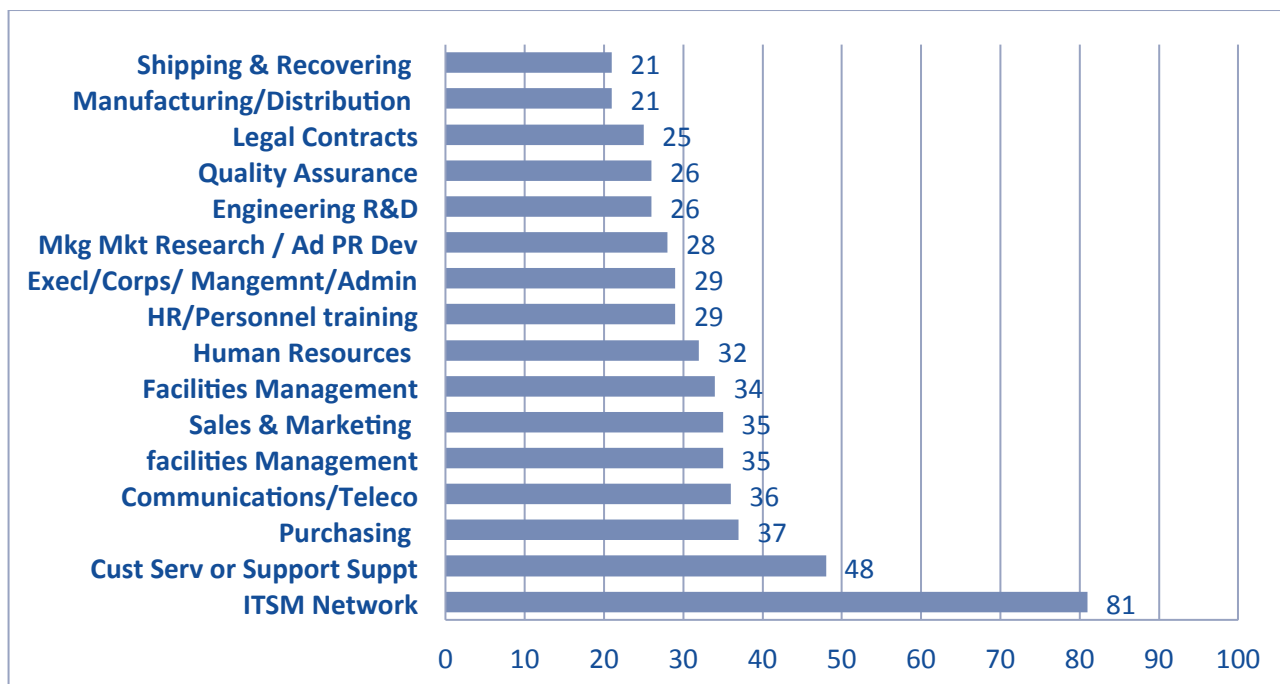


Figure 10 - Q16. which functional areas within your organisation make use of the Service Catalogue to list the services they Support?

5.4 Service Request Catalogue – Adoption & Operation

5.4.1 Retiring Legacy Intake Channels

Service Request Catalogues should present an opportunity to retiring legacy request channels.

However, in practice in many organisations as depicted in **Error! Reference source not found.**Figure 2, the Service Request Catalogue often becomes just another channel for Users to submit Service Requests and the Service Provider to receives work. However, if Users have a compelling reason to use the Service Catalogue, i.e. it is effective and efficient, they should not feel the need to call or email the Service Desk. Therefore, Service Request Catalogue projects should also consider the closure of legacy request channels to achieve the desired savings and improvements in customer satisfaction.

User adoption of the Service Request Catalogue can be assisted through:

- User redirection. For example, training Service Desk Team members to redirect Users to the Service Request Catalogue
- The effective marketing of the Service Request Catalogue
- The use of demand management techniques to channel Users through the Service Request Catalogue. A common example is for organisations to offer superior service levels for requests channelled through the Service Request Catalogue

5.4.2 Managing costs, prices and usage

Service Request Catalogues make:

- It easier for Users to order products and services
- Users aware of products and services that they were previously unaware of

As consequence, the volume of requests for products and services typically rise significantly with the introduction of Service Request Catalogues. This which increases the importance of understanding costs, prices and usages.

Service Providers that charge can shape demand by setting realistic price points. Similarly Internal Service Providers that do not actually charge can seek to shape demand through notional charging.

Understanding and managing how products and services are being used is important to ensure that Service Providers are providing the most cost-effective products and services to meet the business's needs. This is demonstrated on the following example.

An organisation implemented a Service Request Catalogue and noticed a significant increase from Users requesting Adobe Photoshop that retailed at approximately £300. Upon investigation, it was discovered that most of the requests were made by mobile sales people who had only become aware of their eligibility to this software through the advent of the Service Catalogue. Their usage was investigated, and it transpired that their business need for this expensive software was minimal, i.e. to “remove red eye from photographs”. To meet this need in a more cost-effective manner Adobe Photoshop Elements retailing at approximately £70 was added to the catalogue

5.4.3 Service Level Targets

As discussed previously, the amount of time that it takes to be able to fulfil a Service Request is significantly determined by the complexity of the supporting Request Model. Therefore, the Service Level Targets should vary dependent upon the Service Request Type in question. Whilst this may seem obvious, experience informs us that organisations often set a generic Service Level Target for all Service Requests types regardless of their complexity. As a consequence, unreasonably, extended Service Level Targets are often set for very simple requests. Aside from irritating Users, this serves Users to seek to circumvent the process. Conversely such a generic target may be impossible to meet for more complex Service Request types.

5.4.4 User Communication

A Service Request Catalogue is only as good as the process that supports it. This may seem obvious unfortunately experience suggests that organisations sometimes focus on the technical aspects, i.e. the catalogue without consideration to the design and management of the requisite supporting processes, such as User communication.

Most modern Service Request Catalogues provide the capability for:

- The Service Provider to provide updates to Users
- Users to seek updates from the Service Providers

Such capability is typically the biggest source of call reduction and the best justification for hard savings. However, as the saga in Figure 11 depicts, this critical activity is something that Service Providers neglect.

Day 1 -----Original Message-----

From: itservicedelivery@ns.co.cl
Sent: Friday, January 20, 2006 12:09 PM
To: Barry Sanders (bsanders)
Subject: Tx435672: Set up of new laptop. User: Barry Sanders (bsanders)
Your request for Barry Sanders (bsanders)
Tx435672: **Set up of new laptop. User: Barry Sanders** (bsanders)

Day 38 -----Original Message-----

From: Barry Sanders (bsanders)
Subject: FW: Tx435672: Set up of new laptop.)
Any idea when this laptop will be delivered. It's been over a month now

Day 41 -----Original Message-----

From: IT Service Delivery
Subject: W: TX435672: Set up of new laptop for Barry Sanders (bsanders)
Hi Barry,
I have been advised that Dell attempted a delivery this morning.
Did they leave a card or something?

Day 55 -----Original Message-----

From: Barry Sanders (bsanders)
Subject: FW: Tx435672: Set up of new laptop.
Importance: High
It's now 2 months since this laptop was ordered !
Could someone please let me know the status.

Day 70-----Original Message-----

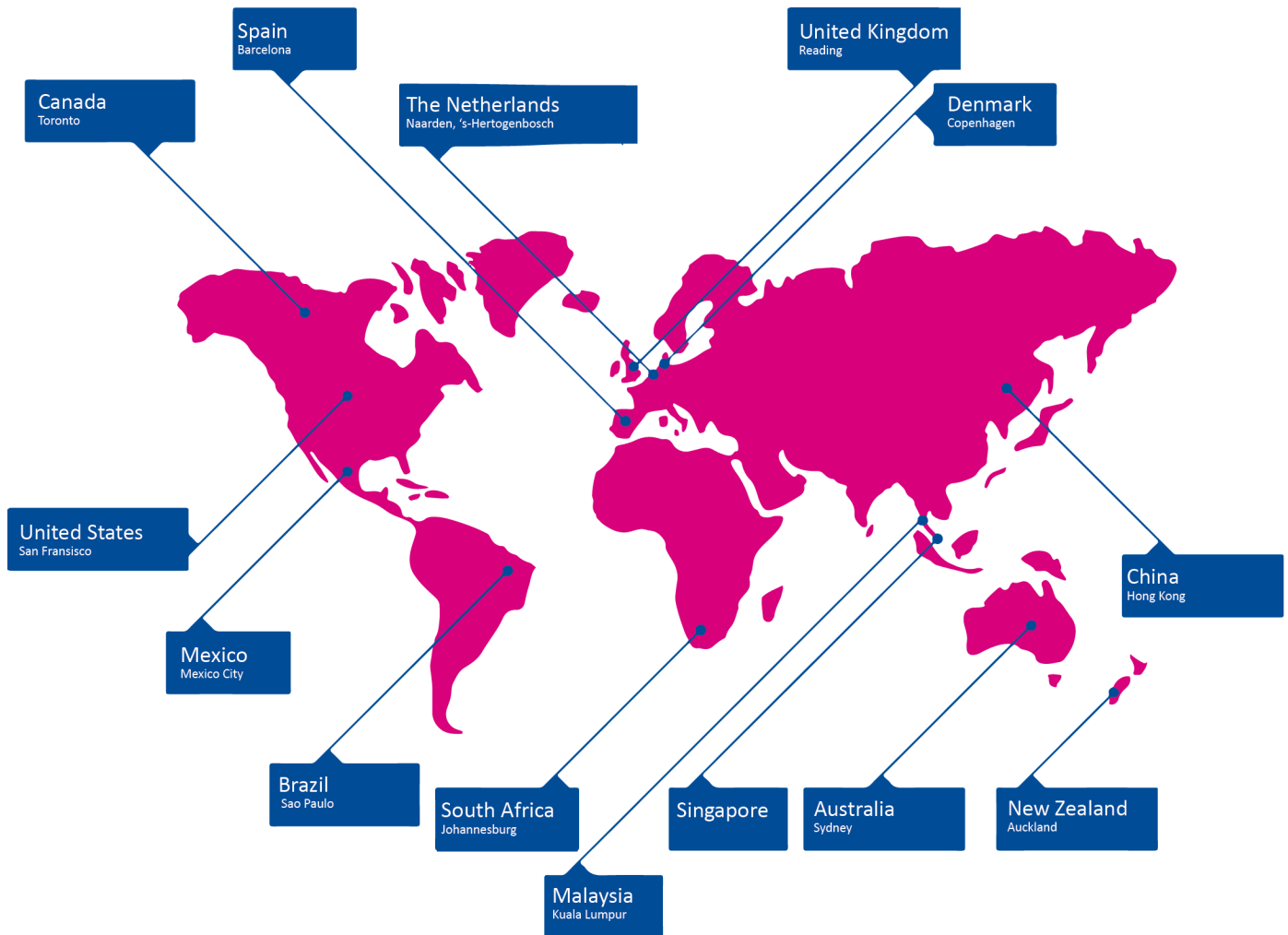
From: IT Control Service Delivery
Subject: RE: Sent to Eric Buren 06/04/04 FW: Tx435672: Set up of new laptop
You should be receiving it today, as per the tracking below.
It's on the vehicle for delivery.

Day 94

From: Barry Sanders (bsanders)
Sent: Thursday, April 27, 2006 12:01 PM
To: David (CIO)
Thought you might be interested in reading The Tale Of The Traveling Laptop
A 3 month, 19 email, frustrating journey that turned out just fine in
the end. I hope this is the exception story.

Figure 11

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