More than a take away menu…
Is the Service Catalogue really ready to deliver?

The Service Catalogue is about to become the next big thing in IT Service Management (ITSM) circles, just as the much over-hyped CMDB phenomena did before it. And yet even the overly enthusiastic analyst comments and vendor marketing sound bites are insufficient to mask the truth that many are beginning to discover for themselves. Why is the advent of a menu of menus such a cause for celebration? And perhaps more importantly, how can a simple shopping list of things really add value to your business?

ITIL v3 has of course brought with it a focus upon all things service orientated. Not that it has really helped define exactly what an IT service is or should be… But at least it has raised the need for IT to deliver high quality value added services in the collective consciousness. The addition of the Request Fulfilment process to the ITIL stable has also given Service Catalogue vendors the veil of legitimacy they required to be able to foist their offerings on the unsuspecting ITIL fan base.

So what is a service? Well… A service can be thought of as the persistent availability of a delivery capability which may be leveraged via transactional exchanges or subscription that may or may not result in physical deliverables and/or tangible and intangible benefits to the entity utilising the service. Whoa! You'll probably need to read that one a few times before it clicks… I did and I was the one that wrote it! Defining what a service isn't is far easier. A service is not a finite menu selection e.g. 'New mouse or keyboard'. Certainly, such menu end nodes may describe requests against a service, in the example cited this would be 'Hardware provisioning' for instance. However, the service which underpins such requests must be capable of handling practically infinite variation (within predefined parameters naturally) if it is to be truly useful.

For the benefit of this article, let us suspend disbelief temporarily and pretend that there is a commonly accepted definition of an IT service and that this definition can be used to describe various service offerings from which end users may select. In this state of nirvana, what could or should a service catalogue actually do? The following paragraphs outline the core functionalities that a service catalogue solution should be able to satisfy if it is to be of practical benefit to any organisation.

Online order handling / Shopping cart

In order to leverage the content of the catalogue it is necessary to provide end users with the ability to search and select items that they wish to receive. Unfortunately, many become obsessed with the glitz of the shopping cart user interface and forget that aesthetics can be changed relatively easily whilst the addition of major pieces of missing functionality may be more troublesome.

Checklist of functions to look for:
- Alternative item suggestions
- Interactive item selection guidance – i.e. a digital personal shopping assistant
- Cross-sell / Up-sell item promotion
- Multiple search paths to reach the same end point
- NLP based searching etc

Sales configuration tools / Product compatibility matrices

The world of IT is not a simple and straightforward place. The level of configurability and huge variety of options associated with IT equipment and services mean that it is necessary for the catalogue to be able to model complex attribute dependency matrices and

compatibility rules. This will ensure that users not only get what they ask for, but that they ask for something that actually exists rather than something that they believe may exist.

Checklist of functions to look for:
- Dependant selections of configuration options
- Multi-variable rules to define acceptable choices
- Dynamic data collection interfaces to ensure all necessary information and configuration parameters are captured at the first (and hopefully last) point of contact

Personalisation engines / User profiling / Service targeting

Too much choice can be a bad thing. A completely unrestricted catalogue would overwhelm many users and could encourage them to request things that they don't really need just because they are there… The catalogue should restrict the items displayed for selection based upon a wide variety of parameters including; job role or function, department, site / location, organisational seniority, level of IT competence etc.

Checklist of functions to look for:
- Configurable restrictions on offering availability
- Requester profile definition and its application to the user base
- Ability to define standard groupings of commonly requested items by role etc
- Proactive service promotion via ongoing campaigns etc

Context analysis / Pre-requisites validation etc

Knowing what a person already has and what job role they perform should help stream line the request fulfilment process by enabling the system to propose, or prioritise, options that compliment their existing set up etc. This awareness should not necessarily preclude the selection of items that will not work together but it should make an attempt to dissuade the unsuspecting user from making basic mistakes.

Checklist of functions to look for:
- Proactive inclusion of pre-requisite items where necessary
- Integration with CMDB to determine current configuration, potential capability and the available capacity of a target device / host
- Ability to request a compatibility check from within the catalogue's self service interface

Entitlement processing / Request escalation procedures etc

As the Rolling Stones put it, "You can't always get what you want" and it is the job of the service catalogue and its sub-systems to say "no" as often as it says "yes". Not every request will be valid, not every requester will be correct and so the system must enable all requests to undergo formal review and approval. These approval processes must vary depending upon the nature of the request etc to ensure that valuable time isn't spent rubber stamping trivial requests and that items which impact the business are given sufficient scrutiny.

Checklist of functions to look for:
- Multiple approval processes depending upon request and requester attributes
- Complex routing capabilities including parallel processing and the initiation of multiple approval cycles during the lifecycle of a request
- Ability to easily review and approve requests from mobile devices / PDA's

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Federated data visualisation / Status update provision

Human nature is such that the second someone submits a request, they want to know how it is progressing. The self service system must provide up to the minute status reports and the ability for requesters to see progress if the service delivery teams are to avoid an avalanche of chase calls and queries.

Checklist of functions to look for:
- Ability to restrict and/or provide visibility into the tasks associated with a request
- Consolidation of multiple task progress measures into an overall progress meter
- Real time access to federated progress data within external delivery systems

Support for multiple cost allocation and chargeback models

Everything has its price and it is important that the people requesting services understand the financial impact of their mouse clicking actions. Whether or not these costs are cross charged against their budgets or not, the very fact that they are made visible will be sufficient in many cases to get individuals to question whether or not they actually do need such an item.

Checklist of functions to look for:
- Subscription pricing as well as usage based, rate cards and fixed fee models
- Cost minimisation suggestions (e.g. regarding delivery methods, purchasing in bulk and timings etc)
- Ability to split / spread costs against multiple cost centres
- Multiple segregated price lists assigned against user groups, departments etc
- Cost transfers upon item returns and redeployments

Tight integration with legacy systems e.g. Inventory, Purchasing, Finance etc

As a shop window into the world of IT, the service catalogue will need to pass requests to, and receive updates from, a wide variety of systems. The request fulfilment process will hand off to incident management, change management and procurement processes as well as potentially passing transactional data back into the ERP environment.

Checklist of functions to look for:
- Support for open standards such as XML, Web Services, JMS etc
- Documented API to facilitate integration with custom built in-house solutions
- Out of the box plug-ins for commonly used off the shelf solutions
- Clearly defined integration touch points with example code etc

Application and monitoring of service levels

If user expectations are to be managed effectively it is vital that the level of service to be delivered is clearly defined and made available to the end user base. Satisfied users are informed users who have received the service they requested within the service levels they signed up to. The service catalogue must ensure that there is sufficient visibility of delivery timelines and service quality measures against the agreed service levels.

Checklist of functions to look for:
- ETA visibility to end users / Expectation management
- True service quality metrics as well as simple delivery clocks

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- Parallel and sequential service levels that combine into an aggregated SLA

So there we have it - A basic shopping list for a shopping list! Anyone considering embarking upon a Service Catalogue implementation would be well advised to include these items as highly desirable requirements within their RFPs / RFIs etc. Certainly some vendors do provide some of these capabilities now. But few, if any, provide them all. When selecting a toolset to assist with your service catalogue journey it is recommended that you quiz the supplier for their future plans in these areas and base your decisions upon the answers and assurances that you receive.

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About the author

Rob Addy is an ITSM professional with over a decade of hands on experience in the field with both enterprise and medium sized organisations. During this time Rob has been fortunate to work for many of the biggest names in the industry in a variety of roles in the UK and the US. From application development and support, to direct solution implementations, to product management and marketing, to consulting management and technical sales, Rob has gained insight into the ITSM world from a wide variety of angles. This 360 degree view of the market enables Rob to balance real life scenarios, customer requirements, best practice processes and technical solution capabilities and limitations to give a unique pragmatic approach to improving IT services using a combination of current best practice and tried and tested experience. Prior to joining the IT industry, Rob worked as a Quality Manager within the risk management, service and manufacturing sectors where he oversaw and managed the process of gaining and maintaining certification to ISO 9000 on several occasions.