

EASYVISTA™

3-PART SERIES

REAPING THE REWARDS OF IT FUNDAMENTALS WITH **BARCLAY RAE**



EPISODE 1:

September 13, 2023 at 4pm BST, 11am EST

SAVE YOUR SEAT

EASYVISTA™



BARCLAYRAE
Independent Management Consultant

Easy-Vista Webinars Episode 1

Futures and Fundamentals



Presenter – Barclay Rae



ITSM Consultant and author since 1994

Over 700 Service Transformation Projects across all sectors

- ITIL4 architect team – co-author *ITIL Practitioner, ITIL4 Foundation*
- Lead Editor *ITIL4 Create Deliver and Support*
- itSMF UK CEO 2015 – 18, Director 2015 – 2020
- SDI Associate, auditor
- Co-author *SDI Service Desk Certification standard*
- Author of *ITSM Goodness*
- Senior Advisor, ITIL, PeopleCert
- Service Management Principal (UK), CDW
- HDI top 25 ‘Thought Leader’

3 Webinar Series

13th September

Episode 1 – Futures and Ai opportunities

11th October

Episode 2 – ITSM Fundamentals

22nd November

Episode 3 – Bringing Fundamentals and Futures together

Agenda

1 Service Management value

2 Key questions

3 Introduction

4 AI Capabilities

5 ITSM Fundamentals – intro

The value of Service Management

Collaboration



HOW WE ENGAGE AND WORK WITH COLLEAGUES, USERS, CUSTOMERS AND PARTNERS

Business focus



THE WAY THAT WE WORK TO MEET BUSINESS NEEDS, DEMONSTRATE VALUE, DEVELOP OUR VALUE STREAMS AND MANAGE COMPLEXITY, USE TOOLS AND WORK PRACTICES TO DELIVER PRODUCTS AND SERVICES

Assurance



THE APPROACH THAT WE TAKE TO MANAGING RISK, ACCOUNTABILITY, TIME-TO-MARKET, AND EFFICIENCY

Innovation



HOW WE DEVELOP NEW AND UPDATED PRODUCTS AND SERVICES TO DELIVER BUSINESS OUTCOMES – BOTH FROM DESIGN AND BUILD TO RUN AND SUPPORT

Governance

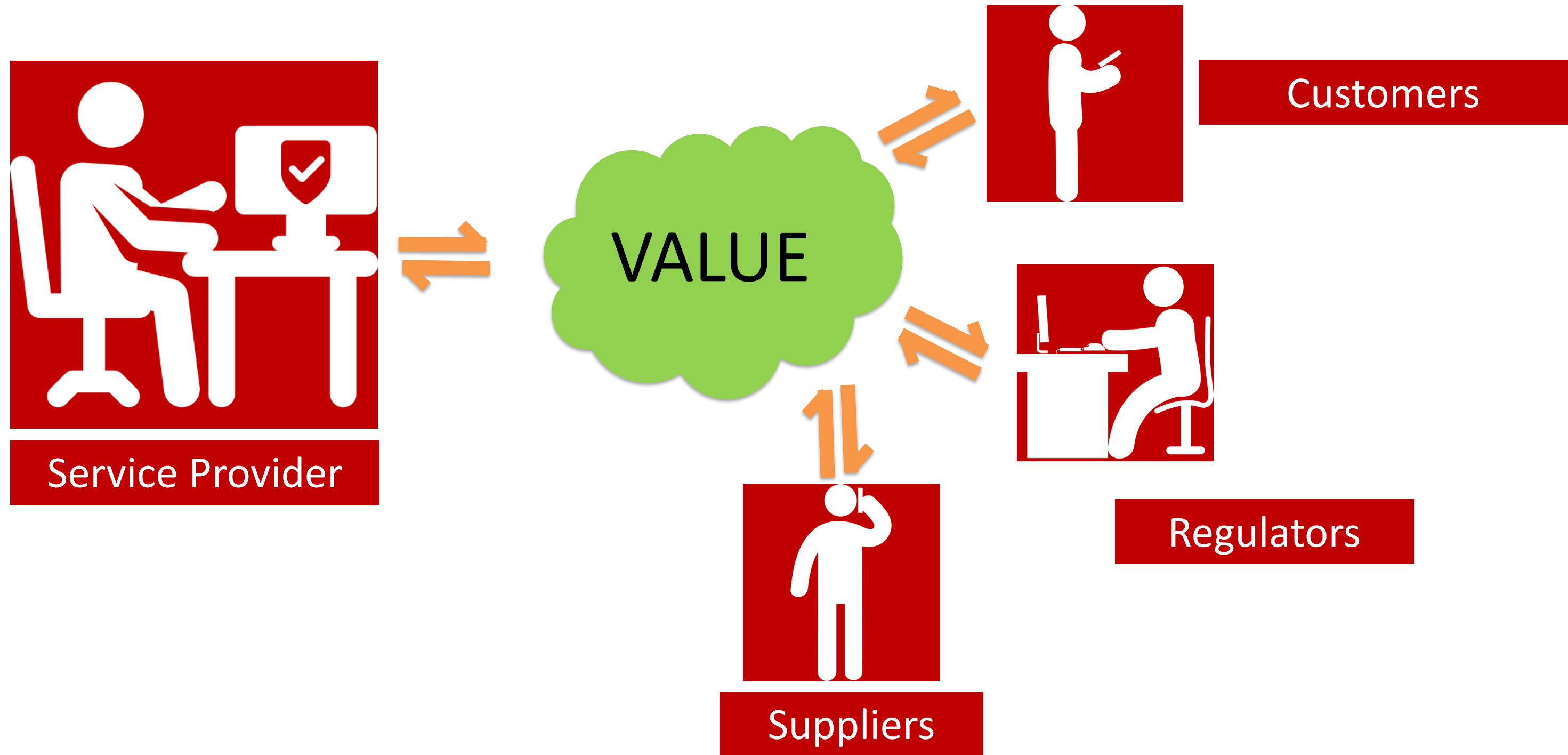


HOW WE ACCOUNT FOR AND SAFEGUARD THE KNOWLEDGE RESOURCES OF OUR CUSTOMERS – PARTICULARLY WITH CLOUD AND DISTRIBUTED MODELS.

Key questions

- 1. Does the (IT/service) organisation deliver what customers need?**
- 2. Can we demonstrate the value delivered?**
- 3. Does the customer appreciate the value delivered?**

‘Co-Creating’ Value



Introduction



The potential for AI is significant

- Improve the customer experience
- Improve services in meaningful ways for business
- Shift the IT workforce from repetitive transactional work to innovative and creative work



AI - key numbers

1. The number of businesses adopting artificial intelligence grew by 270 % in four years.
2. The global artificial intelligence market is expected to reach \$641.3 billion by 2028.
3. 91 %t of leading businesses have ongoing investments in artificial intelligence.
4. 61 % of employees say AI helps to improve their work productivity.
5. 62 % of consumers are willing to submit data to AI to have better experiences with businesses.
6. 15 % of all customer service interactions globally are expected to be fully powered by AI by 2021.
7. Nearly one in four sales teams currently use artificial intelligence in their day-to-day work.
8. 44 % of organizations have reported cost savings as a result of AI implementation.
9. The number of AI-powered voice assistants is forecast to reach 8 billion by end 2023—a 146 % increase from 2019's 3.25 billion.
10. More than three in four businesses say it is important for them to be able to trust AI's analysis, results, and recommendations.

AI - key questions

What is being achieved through AI ?

Is this taking longer to realise value than expected?

Is experience management the next 'shiny' thing that has eclipsed AI or do these concepts work well together?

More importantly, what is the real practical experience of using AI – in projects and operations?

Are organisations getting the return on investment? If not what are the issues?

Are organisations getting the return on investment that they expect, and if not, why not?

Has AI made service more intelligent and freed up agents for higher value tasks?

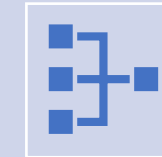
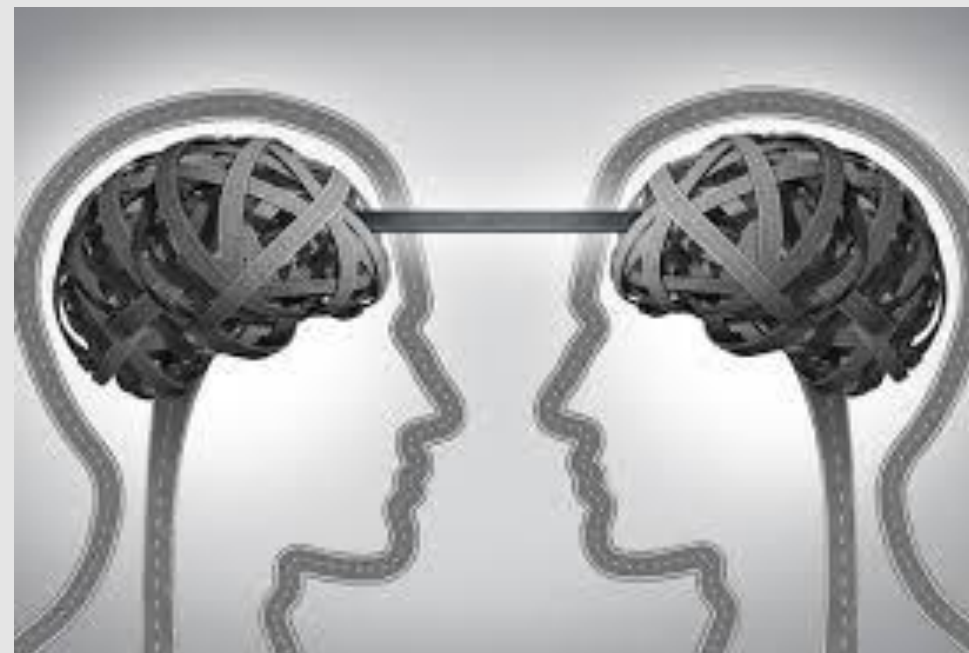
What ethical issues does AI raise?

Does it really pose a threat to the workforce, and how should we be adapting our skills and roles to maximise the benefits?

How has our view of AI changed in a post-pandemic world?

Communication...

 **ITIL**[®]
PRACTITIONER



Communication is a 2-way process



We are all communicating all the time



There is no single way of communicating



Timing and frequency matter



The message is in the medium

AI Capabilities

AI-Driven benefits

- Optimize the use of available resources
- Improvements in practices and productivity
- Better utilization of resources
- Reductions in operational costs
- Improved service levels
- Improvements in the customer experience
- Higher availability of business services
- High productivity
- Lower costs
- Scalability and agility

AI and ITSM

Many organizations are already benefitting from using AI in their service management practices

Using machine learning and natural language processing, organizations can

- improve the management of events, requests, incidents, and problems
- improve the overall customer experience
- Collect data about our services, customer requirements, & end-user issues and solutions
- Develop systems that utilize AI to drive improvements to service design, delivery, & support
- Make data-driven judgements and decisions based on pattern recognition across multiple channels and systems

AI Challenges



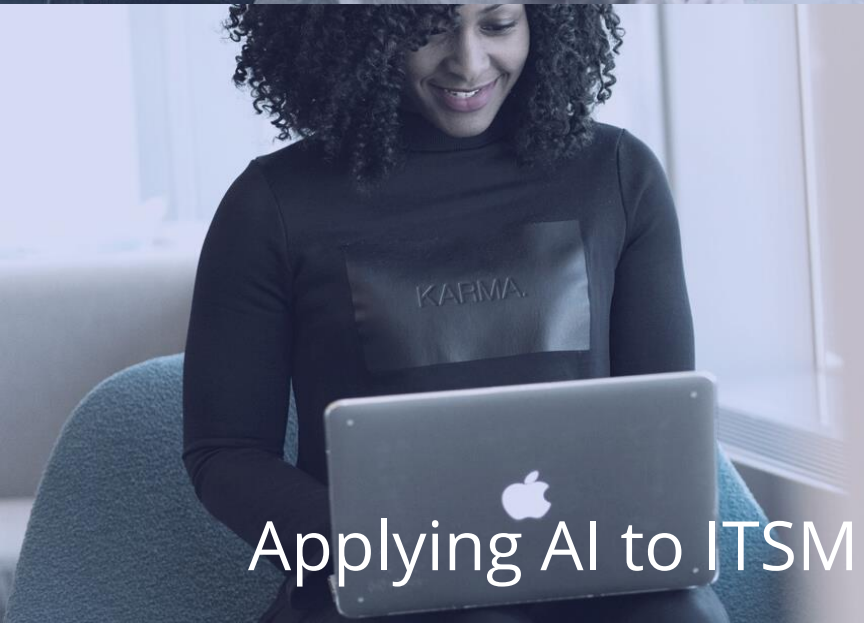
Tools alone don't deliver successful service management

Collaboration and 'joined up' **end-to-end** thinking are needed for success.

To prepare for AI - data and processes must be robust and accurate – Knowledge, CMDB, practice/workflow documentation

Usually this will require some changes for all teams in how they do their work.

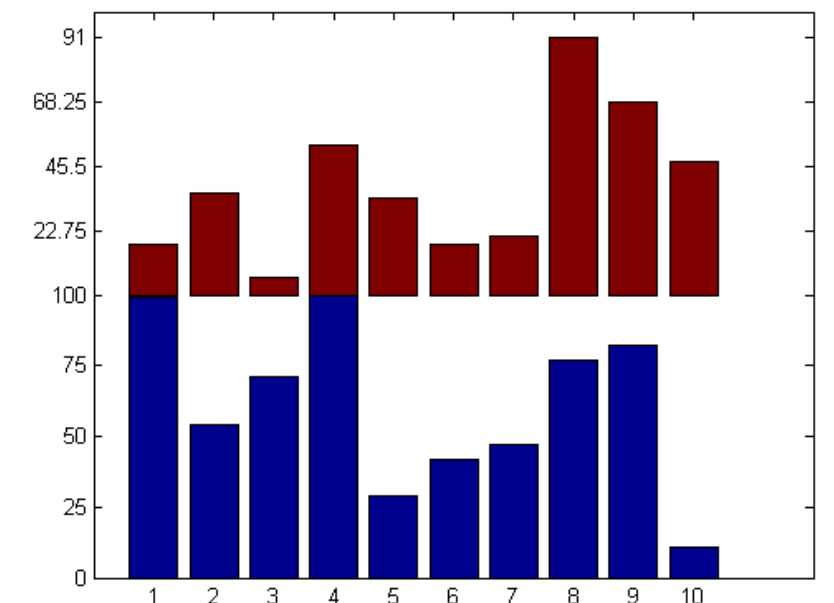
The 'why' must be clear to all...



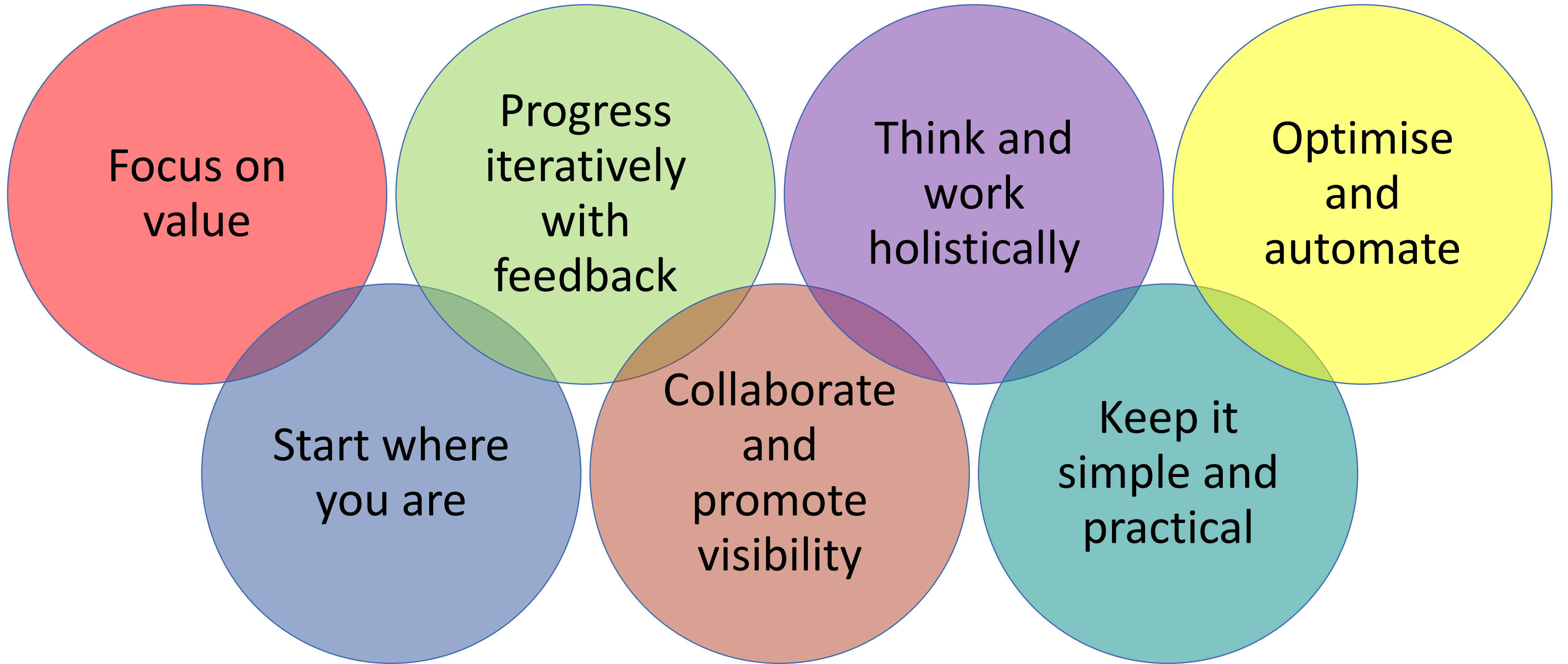
ITSM Fundamentals

Key questions

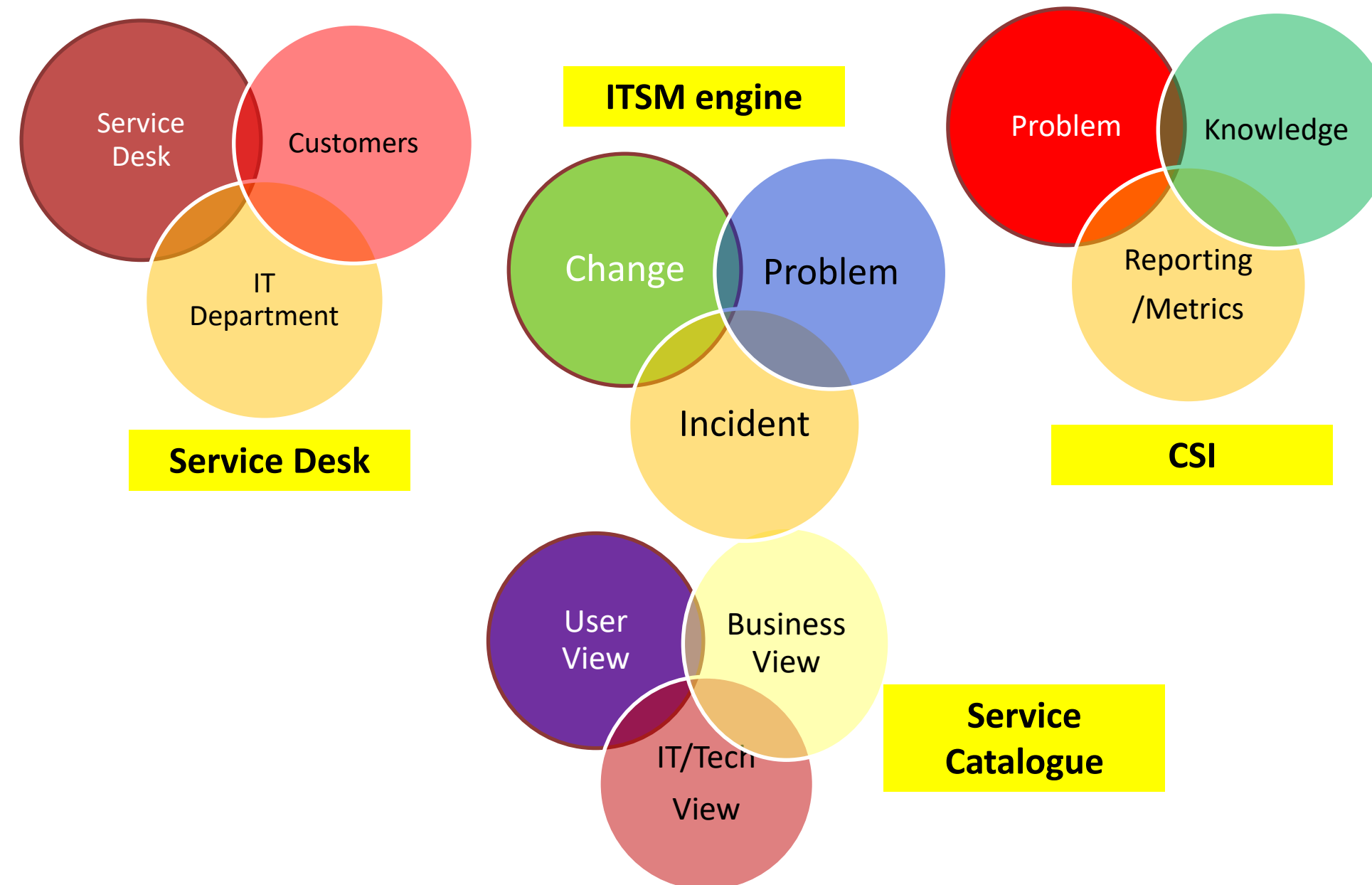
- Are we working together towards shared business objectives?
- Are our cross functional teams working effectively?
- Do we understand what our users/customers feel and experience when using the services?
- Do our processes and practices work towards achieving the best outcomes ?
- How do we measure and present our performance?
- Are we measuring the right things?
- Are we presenting and demonstrating about value?



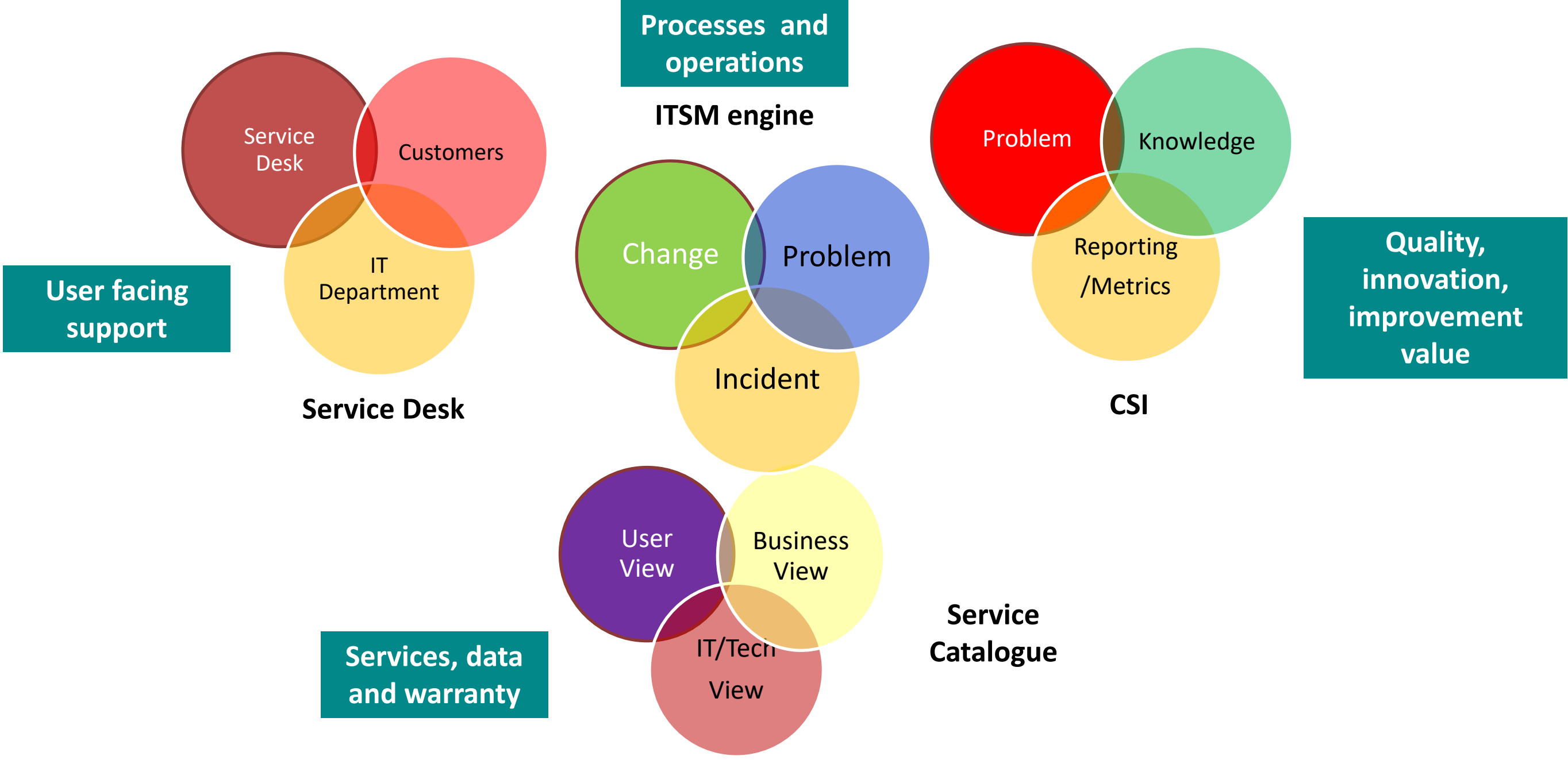
Guiding Principles



Core ITSM elements



Core ITSM elements



Why do we need fundamentals?

Solid Foundations

Data Structure

Process and practice structure

Integration of practices

Data quality and consistency – knowledge, configuration, organisation, services, consistency.

Where is my stuff..? What's happening with it? Do I want to automate this old stuff..?

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Thank You



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AI and ITSM Practices

Features and Benefits

Barclay Rae + Dan Turchin

Applying AI to ITSM



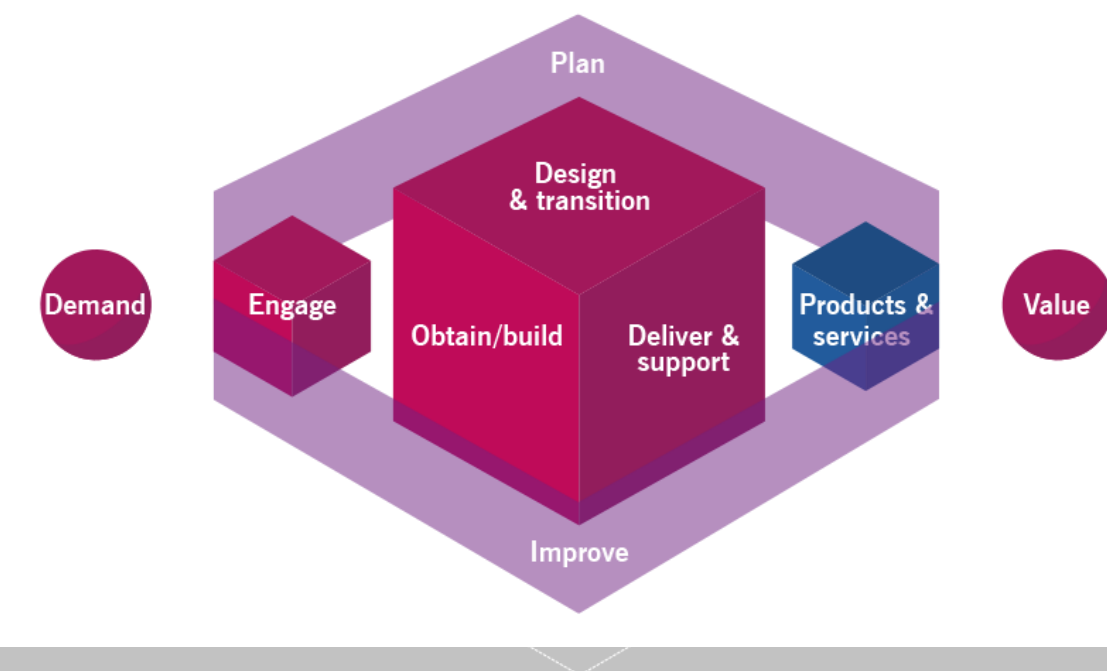
AI and ITSM

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The following sections look at opportunities for AI to make a difference with ITSM practices...



AI and Knowledge Management

- **Businesses are increasingly accumulating massive amounts of unstructured data** - in images, documents, audio, video, and other data files where traditional analytical methods are not as effective
- Organizations can use machine learning and natural language processing to find patterns and derive insights from unstructured data where it was impossible to do so in the past
- AI can be used to auto create knowledge articles from data, suggest articles for human intervention or use, and even suggest knowledge articles directly to customers through self-service

- **Businesses are increasingly accumulating massive amounts of unstructured data** in images, documents, audio, video, and other data files where traditional analytical methods are not as effective

Organizations can use this data to support business decisions

- *IBM's Watson uses natural language processing (NLP) to analyze and gain insights from large volumes of unstructured data in many different vertical markets*

Service Desk

- **Service Desks collect and can analyze data across multiple channels**, including social media and self-service, to gain insight into the customer, their work processes, and changing needs
- Using human language interactions, the AI-driven systems can understand and interpret the spoken or written word and personalize experiences for customers
- Self-service through AI-driven technology is a frequent entry point of AI in ITSM
 - The cost of entry is lower than many other forms of artificial intelligence (Shift Left)
 - Many high-tech firms provide free access to decision-based agents
 - The adoption cycle is also made easier due to the importance of knowledge captured and (re)used in service desks

Service Desk

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Example

- *A higher education institution uses prior incidents and requests to develop a chatbot specifically for handling of all students issues during the onboarding process at the beginning of the school year for incoming freshman.*
- *The chatbot manages the entire process, keeps students connected with campus resources, and also proactively notifies students of all upcoming deadlines and any potential exceptions*

Incident Management

- **In the early stages of adoption, AI is most often used to improve**

- Incident categorization

- Issue prioritization

- Pattern recognition for commonly occurring incidents

- Auto resolution of incidents

- Workforce optimization

- It is important to ensure that data in the incident management practice is structured consistently and properly maintained – user data, CIs/CMDB, Knowledge

Incident Management

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 - Incident categorization
 - Issue prioritization
 - Pattern recognition for commonly occurring incidents
 - Auto resolution of incidents
 - Workforce optimization

Example

- *Artificial intelligence can help to identify a resolution for a customer query by*
- *(1) using natural language processing to understand the intent of the customer query and (2) matching it to solutions stored in the knowledge base.*
- *In many cases, solutions can be automated, thus reducing the need for any human intervention.*

Service Request Management

- **AI can automate commonly occurring service requests without the need for human intervention**
- AI can help with the process of automating new requests; by learning from previously documented requests and creating new workflows based upon pattern recognition
- AI can also be used to analyze patterns in prior service requests to
 - Anticipate potential future requests
 - Assist with reducing errors in the assignment of requests
 - Predictively manage requests to prevent service level agreement breaches

Service Request Management

- **AI can automate commonly occurring service requests without the need for human intervention**

Example

- *A virtual agent is available 24x7 to handle basic service requests such as password resets, software or hardware requests, purchases, downloads, and the allocation and distribution of licenses*

Problem Management

- **Artificial intelligence can analyze patterns in incidents, identify potential areas for future problems** and alert staff of these areas. This is done through analysis of data and by using machine learning.
- A large dataset of previously documented incidents, problems, and resolutions, artificial intelligence and machine learning can help to ensure that problems are handled more efficiently and prioritized and categorized with less error
- When appropriate, the system can also automate workarounds, perform preventative maintenance, apply fixes, and auto generate change tickets with risk assessment and impact analysis

Problem Management

- **Artificial intelligence can analyze patterns in incidents, identify potential areas for future problems** and alert staff of these areas. This is done through analysis of data and by using machine learning.

Example

- *An ITSM solution identifies and logs a recurring issue by studying patterns and anomalies in incident, problem, and event data.*
- *Based upon the insights gained through analysis, the ITSM solution identifies a potential fix and corrective action*

Info Security Management

- **Artificial intelligence can assist with the prevention, detection, and correction of security related incidents within organizations**
 - Improve the organizations ability to verify and predict potential threats and automate responses, thus reducing risks
 - As new services are designed, AI can provide great benefits for the security management of that system
- Use AI to detect anomalies within ITSM data, identify vulnerabilities, and prioritize issues for staff intervention is only the beginning
- Organizations must begin to build AI into the entire value chain to predict, prevent, detect, and learn from security breaches.

Info Security Management

- **Artificial intelligence can assist with the prevention, detection, and correction of security related incidents within organizations**

Example

- *A service can use internal sensors to understand and prevent security breaches based upon a comparison to normal conditions*
- *A software development company creates a software application using artificial intelligence that*
 - (1) detects potential bugs and vulnerabilities*
 - (2) identifies the potential risk for a security breach, and*
 - (3) automatically develops an effective protection against any potential threat.*

Measurement and Reporting

- **Predictive analytics helps organizations to make better management decisions, produce new insights about customers and services, and assist with better data analysis**
- Predictive analytics uses the data collected in ITSM value streams and can apply ‘traditional’ statistics and data modeling techniques along with machine learning and AI
- Using AI with a 360-degree view of the customer across all channels of support will help drive improvements in service delivery and support and provide insights for new innovative services

Measurement and Reporting

- Predictive analytics helps organizations to make better management decisions, produce new insights about customers and services, and assist with better data analysis

Example

- *A service company uses predictive analytics to develop a model that identifies customers who are most likely to not renew at the end of their contract and devise a marketing plan that provides incentives most likely to retain those customers for an additional term*

Workforce and Talent Management

- As media coverage of artificial intelligence has increased in society, so has the fear that artificial intelligence will replace humans and eliminate jobs
- ITSM leaders will need to focus on developing the existing workforce for the future, where people and skills are used to
 - Program and refine the way that artificial intelligence works
 - Ensure business processes and practices successfully interface with AI built into business services
 - Deal with complex situations or situations not previously encountered

Workforce and Talent Management

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- ITSM leaders will need to focus on developing the existing workforce for the future

Example

- *AI can also support training, education and knowledge sharing among ITSM professionals, as well as identifying the correct resource for handling exceptions*

Monitoring and Event Management

- **Automated event correlation and filtering is improved through applying artificial intelligence and training the system with existing documented rules, workflows, and automated responses**
- Artificial intelligence can also be used to:
 - monitor systems and watch for previously unseen events
 - use events which have already been resolved to determine the best approach to handle subsequent events
 - drive the development of new automation of commonly occurring events

Monitoring and Event Management

- Automated event correlation and filtering is improved through applying artificial intelligence and training the system with existing documented rules, workflows, and automated responses

Example

- *Artificial intelligence is used to identify patterns in previous monitoring data, to proactively balance workloads in real-time and reduce capacity-related issues with a service.*

AI-Driven benefits



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- Optimize the use of available resources
- Improvements in practices and productivity
- Better utilization of resources
- Reductions in operational costs
- Improved service levels
- Improvements in the customer experience
- Higher availability of business services
- High productivity
- Lower costs
- Scalability and agility

Practical tips for success



- **Develop new awareness and skills in AI, Data Analytics...**
- **Develop awareness and practical focus on good governance**
- Don't assume that tools alone will simply make change happen
- Focus on people and ways of working