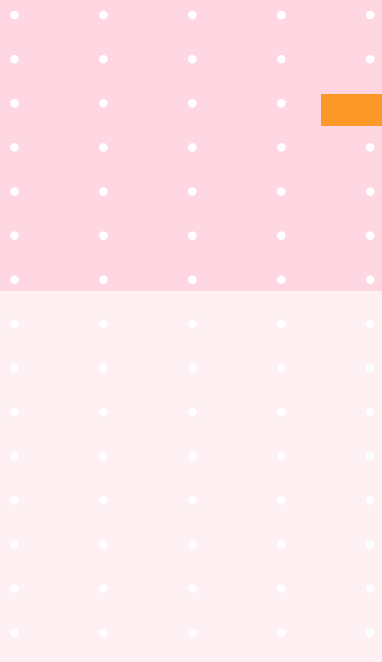




LIFT, SHIFT & PLAY

How to migrate your IT service desk
without disturbing the routine





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Introduction

Freshservice Day 1 Inbox x

Bob Parker 3:10 AM (hrs ago)
 to Anne-Laure, Carol, Julie, Lynn, Strgaan, Viktoria, Wojtek, Calvin, Pieter, Sanjeev, me, Robert, Matei

Hi All,
 Some of you are in bed or nearing it, others continue to grind it out.

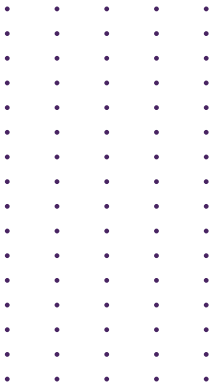
For most part we survived day 1 and the feedback I am getting from the field is mostly very positive.

It would not have been possible without the extraordinary efforts of you, the team.

Thank you for making Freshservice a reality and a success.

Onwards and upward for day 2 !!

Robert Parker
 EVP, Customer Support and Client Services



The above email communication from a CIO to his internal & vendor implementation team sums up service desk implementation. On the one hand, the implementation of a new IT service desk is a critical juncture in the service desk lifecycle and the success of your IT strategy. While on the other, ambiguity and uncertainty often surrounds it. With hidden obstacles lurking around every stage of the implementation process, faulty implementation and poor onboarding can put you on the back foot.

In this e-book, we aim to bring method to the madness. With two consecutive award-winning implementations and many other successful go-lives under our belt, we aim to collect and distill our experience of onboarding customers seamlessly. This ebook covers what works & what doesn't, tips & tricks, lessons learned & success stories, so you can better strive to ensure a successful, business interruption-free service desk implementation.



NHS Western Sussex
 SDI Implementation award, 2017



Descartes
 SDI Implementation award, 2018





Challenges in service desk implementation

RESOURCE CONSTRAINTS



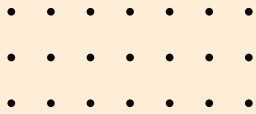
ELABORATE IMPLEMENTATION PROJECT PLANS



COMPLEX ONBOARDING AND TRAINING



RISK OF SERVICE CONTINUITY & DATA LOSS





Jumpstart your service desk implementation



Structured engagement model

A dedicated cross-functional implementation team with clear ownership ensures you start on the right foot. Assigning a steering committee to chalk out a project plan and define engagement levels can ensure speedy implementation. Additionally, forming a technical working team, responsible for requirement definition and software implementation can ensure you launch confidently and error-free.



Direct Partnership Model

Partnering with the service desk provider can significantly improve the success of the implementation. Initiate, configure, test, train, and go-live with a direct partnership model and comprehensive project management. Ensure a seamless go-live with a tried and tested award-winning onboarding plan.



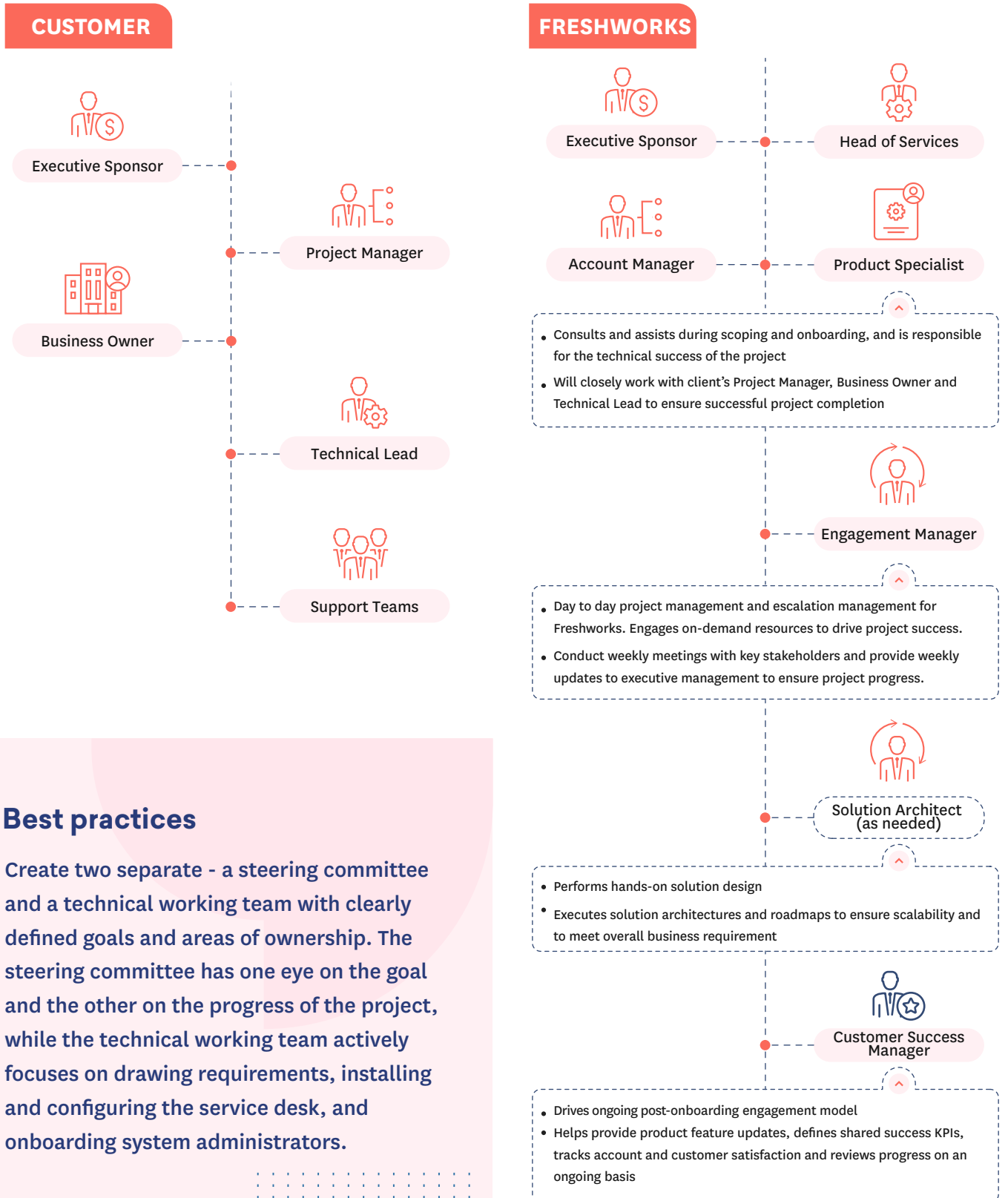
Agile methodology

Take an agile approach to service desk implementation, combined with best practices from the waterfall mode of delivery. This approach helps manage risks better and also deliver on time and budget.



A

Structured Engagement model





B

Direct Partnership Model

A direct partnership model with the service desk provider, built on four key pillars is essential to the success of your service desk implementation.



Comprehensive project planning

Based on extensive requirement gathering, build a detailed project plan. This plan will serve as your north star, so be sure to include key requirements, milestones, stakeholders, integrations, configuration checklist, and more.



Dedicated consultation sessions

Curate workshops across the implementation lifecycle to collaborate effectively. From gathering requirements, deciding on a working model, measuring progress, build dedicated consultation sessions with internal and external stakeholders.



Methodical training and documentation

Bring method to the onboarding and training madness. Follow a train-the-trainer model to effectively onboard agents at scale and speed. Partner with the service desk provider to build a training module and document a training manual to future proof your training needs.



Stress-free transition

With an agile approach to service desk implementation, build phases, and milestones into your implementation journey. Transition effortlessly from one stage to the other with the help of domain experts. Leverage customer success teams and support teams to ensure post-implementation service desk adoption and success.



Direct Partnership Plan overview



INITIATE

- Project Kick-off
- Requirement & scoping workshop
- Project plan
- System administrator training



ELABORATE IMPLEMENTATION PROJECT PLANS

- Configuration
- Integration development
- Data migration



COMPLEX ONBOARDING AND TRAINING

- Functional testing
- Training



RISK OF SERVICE CONTINUITY & DATA LOSS

- Internal launch
- Customer success
- Support model



01 /

Initiate

The objective of this phase is to set a strong foundation for a successful and no-risk go-live. Significant outcomes from this phase should be to gather all requirements, define scope and objectives, outline key project activities along with roles and responsibilities, and train your system administrators and product champions on the configuration process.



Project Kick-off

Align customer and service desk providers' teams to define project objectives, scope, expectations, and requirements for how your support team will utilize the product.



Requirement & Scoping workshop

Remote and on-site workshops to review business processes, use-cases, integration requirements, and migration needs.



Project Plan

A detailed project plan that typically includes tasks, owners, timelines, and milestones. It should ideally cover details regarding system configuration and infrastructure setup (e.g., mailbox, firewall, single sign-on, etc). Include timelines and meeting dates to keep the onboarding on track by sharing status updates and addressing any issues or project risks/blockers.



System administrator training

Start early with the administrator training for system admin and product champions. The admin training should cover the configuration and maintenance of the system and equip your team with the knowledge to maximize the potential of the solution.

Best practices

Use an implementation kick-off questionnaire that enlists all the configurations, integrations, marketplace, and custom apps. This document will then serve as a guiding light through building a project plan, allocating resources, and implementing the service desk.

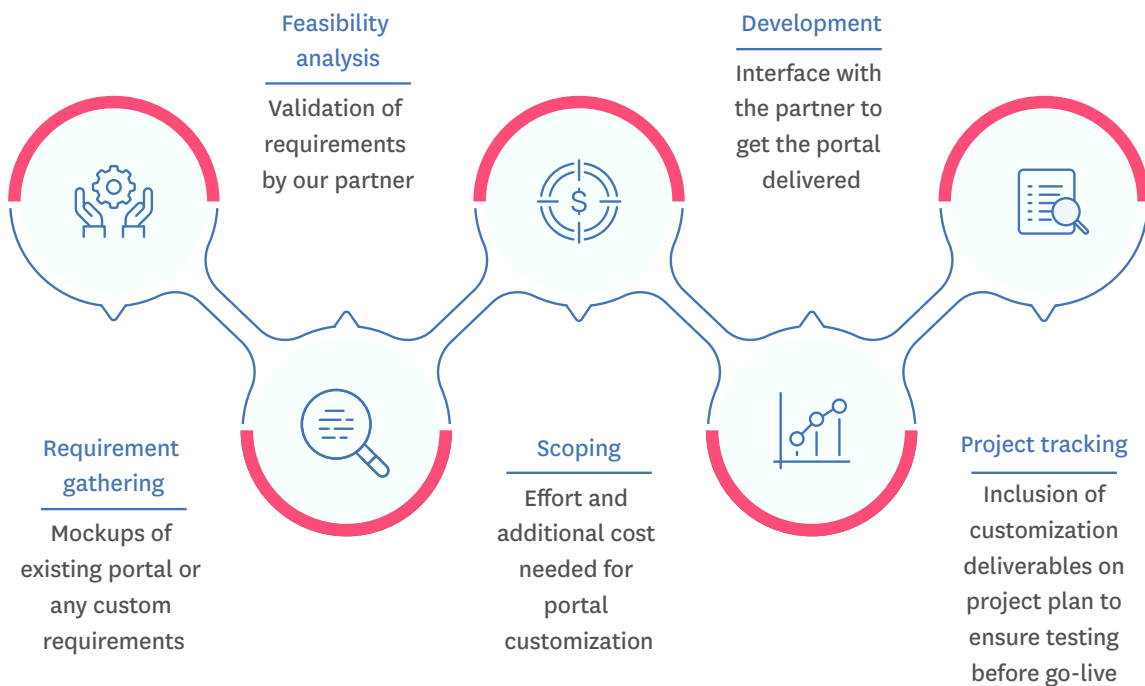


02 /

Configure

This phase should focus on organizing joint configuration sessions (onsite) to ensure alignment between best practices and your functional/technical requirements. The Product Specialist works closely with your management and admin teams to strategize how the identified needs can be enabled using the product functionality. Here are three examples of orchestrating for easy configuration.

EXAMPLE 1 Configuration: Portal customization



Best practices

Take a phased approach to configuring and implementing your service desk modules. Start by launching the most crucial modules such as request fulfillment, service portal to ensure service continuity and a seamless end-user experience during transition.



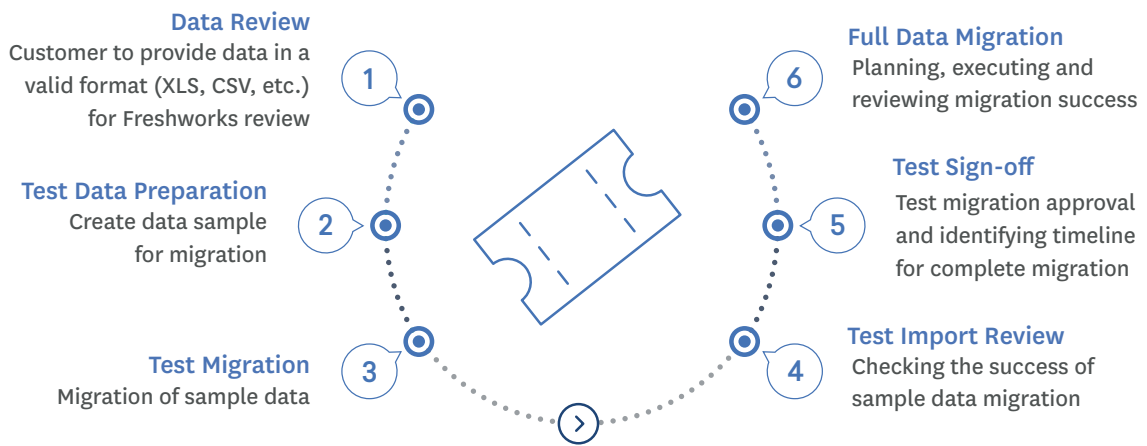
EXAMPLE 2

Integration Development : Custom app integrations



EXAMPLE 3

Data migration: Solution article migration





03

Test & Train



Test

After completion of the implementation and configuration tasks, operational testing can begin. Identify a group of super users across different roles and test different service delivery scenarios. Test incidents and service requests in the service desk system. Piloting the service desk with a variety of test data such as user roles, SLA times, workflows can ensure you identify, resolve and prevent failures that can potentially affect live operations.

Best practices

Always plan a soft go-live date after testing the service desk implementation. Select a small group of admin members, agents, and end-users to raise requests, register real incidents, and resolve IT support tickets to ensure operational success.



Train

This phase includes training the agents, users, and other stakeholders involved. Leveraging a train-the-trainer model can ensure you onboard at scale and speed. Identify a small group of process leads and product champions who will, in turn, train support teams and end-users. Focus on phasing out old behaviors and processes before launching new ones.



Training Resources

Deploy online material and courses for a better understanding of the system. Create end-user documentation reflecting any additional integrations or customizations, how-to-guides, and user manuals. In addition to training sessions, check with your service desk provider on the availability of any learning modules, certification courses, and latest training material to seamlessly onboard new agents and develop existing ones.

Best practices

Migrating your IT service desk is an opportunity to set new standards, start new processes, and instill a new way of working. Rethink the user behavior you want to encourage and the processes you want to adhere to while training agents and end-users. Incentivize the desired behavior and demonstrate the ease of adapting to new processes.



04

Go-Live



Launch day

- ★ Work with your service desk provider to plan a grand organization-wide launch day to amplify communication & garner attention.
- ★ Print training material, sent out launch mailers, give out branded goodies to generate awareness and interest around the new service desk.
- ★ Set up a communication desk in partnership with your service desk provider in the initial weeks for end-users and agents to address queries.

Best practices

Have a failover plan. Despite extensive testing and a soft go-live, the launch day and go-live can go wrong for several reasons such as full load, performance issues, etc. To cover for such unforeseen circumstances, have a backup plan for end-users to reach out to your IT team, record incidents, and raise service requests.



C

Agile methodology

Take an agile approach to the implementation project delivery combined with project management best practices from the waterfall model of delivery. This approach helps us manage risks and also deliver on time and budget. Additionally, follow the same model for any software development required in terms of custom app development or 3rd party integrations for the onboarding process. The ideal sprint cycle that we've seen success is a two-week sprint cycle. Prepare a tentative sprint outline to help gauge the timeline (and the total number of sprints) to complete the onboarding effort. This methodology allows you to focus on the features and requirements most critical to the business and deliver a working and thoroughly tested solution.



How to plan the two-week sprint cycle

- ★ Start with a sprint planning meeting to pull stories based on priority from the backlog and determine each story's complexity by recording a story-point
- ★ Determine and execute story tasks
- ★ Follow daily stand-up meetings, to review past-day accomplishments, current day plan and raise any impediments
- ★ Setup mid-sprint checkpoint meeting, to ensure all stakeholders involved can handle the stories outlined in the sprint, and if not, move stories that cannot be implemented to the next sprint
- ★ Include a demo at the end of the sprint to show the stakeholders progress, i.e. working code and configuration
- ★ Include sprint retrospective meeting, to gather lessons learned, what worked, what did not and to adjust strategy accordingly for the following sprint





ABOUT

Freshworks provides customer engagement software to businesses of all sizes, making it easy for customer support, sales and marketing professionals to communicate more effectively with customers and deliver moments of wow. Freshworks offers a full suite of SaaS (Software as a Service) products that create compelling customer experiences and lets businesses share a 360-degree view of relevant customer information internally.

Founded in October 2010, Freshworks Inc. is backed by Accel, Tiger Global Management, CapitalG, and Sequoia Capital India. Freshworks is a 2,000 + team headquartered in San Mateo, California, with global offices in India, UK, Australia, and Germany. The company's cloud-based suite is widely used by over 150,000 businesses around the world including the NHS, Honda, Rightmove, Hugo Boss, Citizens Advice, Toshiba and Cisco.

For more information, please visit www.freshworks.com