

## The Technology Behind Enterprise Request Management

Enterprise Request Management (ERM) enables enterprises to deliver business services faster and at lower cost while dramatically improving the customer experience. ERM is a business-efficiency strategy that centralizes and automates business processes and service requests using an intuitive Web user interface tied to an integrated back-end delivery system. The goal of an ERM strategy is to allow business service providers to meet enterprise service delivery requirements in shared-service environments in a scalable, cost-effective, and above all, customer-centric manner. [1]

Conventional request management systems have often been criticized for forcing service requestors to negotiate a labyrinth of processes based on the preferences and convenience of each internal service organization—not those of their customers. As a recent report from Interactive Intelligence Group puts it, “Many firms perform their business processes with no attempt to delight the customer.” [2] And all too often, in shared-service environments—in which multiple functional departments such as Information Technology (IT), Human Resources (HR), facilities, marketing, and accounting deliver business services—each business area has its own systems for managing business services delivery.

These are function-centric rather than customer-centric approaches. They force users to learn and use multiple methods for requesting the services they need in an inconsistent and often frustrating manner. Their structures often make little sense to service requestors, who don’t know or care how other internal business areas are organized. They just know they have a service request which they want fulfilled in an easy and intuitive manner.

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Exacerbating this frustration is the reality that in this approach to request management, employees are faced with complex service delivery models that require access to data and processes managed by back-end systems “owned” by various functional groups. The internal customer must learn to interface with each of these systems along the way, delaying the project and increasing training costs. And if these disparate functional systems don’t “talk” to each other, error-prone manual data entry is required, leading to further inefficiencies as well as redundant and potentially mismatched data in different systems.

This white paper explains the technology components required to implement an ERM strategy. Since the ERM approach is designed to leverage existing investments enterprises have made in core business software platforms, from the standpoint of both financial capital and intellectual property, most organizations already will have much of the technical foundation for ERM in place.

### Benefits of ERM

ERM offers a model for managing service request business processes that’s superior to the traditional siloed approach. In the federated collaboration approach of ERM, a single, easy-to-use request portal replaces the hodgepodge of emails, phone calls, and disparate department online request form front-end systems. The portal serves as a single system of engagement between service requestors and the data within the

departmental or enterprise departmental software—the systems of record—that must be modified, updated, or changed in order to fulfill the request. Connecting the portal to the core business systems is an automated workflow management “backbone” application, or orchestration engine, that automatically manages approvals, scheduling, and fulfillment task workflows.

One critical benefit of implementing ERM is obvious: it’s based on a customer-centric approach that substantially improves the customer experience. In addition, there are a number of other compelling reasons to implement ERM. The ERM approach:

1. Reduces fulfillment costs;
2. Accelerates fulfillment time;
3. Ensures first-time fulfillment;
4. Avoids redundant data-entry errors;
5. Eliminates the need for customers to learn and use multiple system interfaces; and
6. Frees customers to work on higher-value tasks instead of managing their requests.

## The Architectural Foundation of ERM

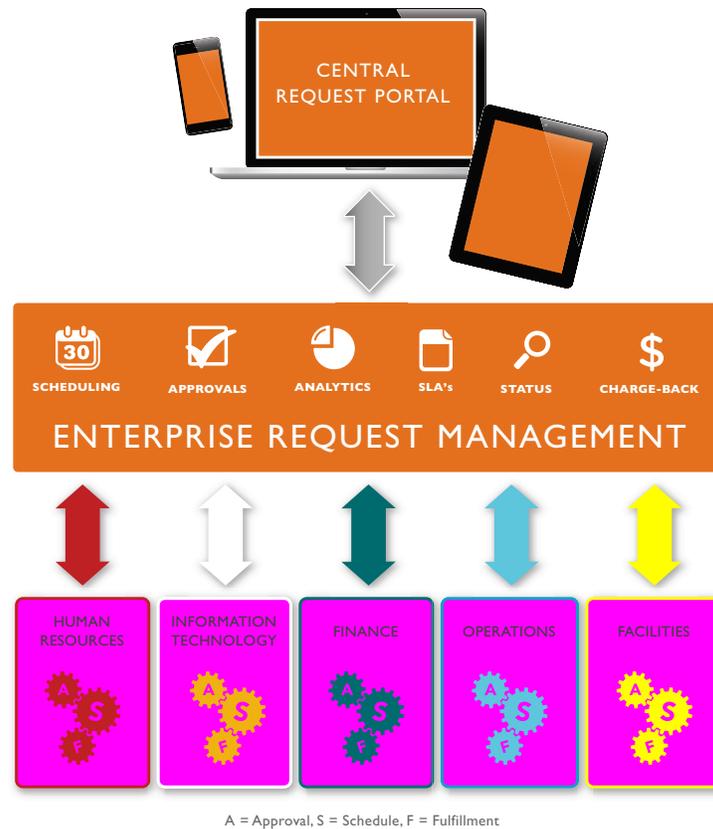
The three basic foundational requirements for ERM are:

- Request management portal software with an intuitive Web front end that can be used by any enterprise service requester and configured by business function managers (with minimal technical assistance) to present services delivered by any department—including IT, HR, Operations, Finance and Accounting, Facilities, and other areas—that fields large volumes of service requests, as well as complex services that involve multiple functional groups.
- Business process workflow automation software that automates approval routing, scheduling, and fulfillment processes for any specific type of service request submitted and securely communicates with the back-end systems involved in fulfilling the request. For example, in a complex service request such as onboarding a new employee, workflow automation software might need to communicate with multiple back-end systems including payroll, facilities, and IT provisioning.
- Core enterprise and department applications involved in the actual scheduling, delivery, costing, billing, reporting and other tasks required to fulfill a service request.

The functional requirements for ERM involve orchestrating the seven key elements detailed in the service management process below. In a recent analysis of enterprise service request solutions, Forrester Research identified 19 software vendors capable of meeting some of the functional ERM requirements. They ranged from large software companies with broad portfolios of software solutions, such as IBM, HP, and CA, to more specialized vendors who focus mainly on the request management space, such as Biomni, PMG, and Kinetic Data. [3]

The remainder of this white paper details the technology requirements to create a complete ERM framework.

## The Technology behind ERM



### 1. Central Request Portal

ERM starts with an online enterprise service catalog of common service items. The portal creation software should make it easy for functional department managers to create new service items from scratch, or to clone and modify existing service items.

Rather than having to navigate different screens or even different systems, users should be able to request any type of service request via a single, intuitive Web-based request portal, at any time, from any desktop or mobile device.

Alternatively, an ERM process may be triggered by a form submission or an automated event (e.g., reaching a certain date automatically sends an email message reminding a customer to renew an annual maintenance agreement).

As a system of engagement, the Web portal must integrate with systems of record needed to complete the ERM fulfillment process, including all major ITSM, ERP, HR, and other applications, such as BMC, HP Service Manager, PeopleSoft, Salesforce.com, and ServiceNow. Ideally, the portal application should enable business process owners to build out a catalog of common service items quickly, and incrementally, using rapid deployment tools.

## 2. Scheduling

Once a request has been triggered, it needs to be assigned to individuals or teams for fulfillment. Depending upon the nature of the request, scheduling may be automated or may require human intervention using a scheduling tool to coordinate schedules for personnel, resources, and facilities.

This requires use of task workflow automation software or an orchestration engine—the “backbone” of the ERM implementation—that communicates with and between in-place departmental (e.g., ITSM, HRMS, accounting/finance) and enterprise (ERP) software platforms, possibly supplemented by specific scheduling software. For scheduling purposes, the workflow automation/enterprise application integration (EAI) backbone engine will need to access various calendars (e.g., Outlook, Google, IT, or other department-specific) in order to coordinate schedules for people, facilities, equipment, and other resources.

In an ERM process, the EAI/workflow automation backbone engine provides two-way communication with enterprise systems to manage approvals, automated scheduling and fulfillment. For situations where scheduling can't be automated, a dedicated scheduling tool will be required that can present multiple data parameters related to resource scheduling, in a user-friendly interface, that allows for easy and accurate human scheduling decisions to be made. The tool should provide visibility into key business processes in an actionable format, giving human schedulers the ability to coordinate personnel, equipment and facilities resources for fulfillment in ERM processes.

## 3. Approvals

When a manager or system owner is required to approve an order, expenditure, system access or other request, the workflow automation software ensures that requests for approval (and follow-up reminders, if necessary) are automatically sent to the appropriate individuals or teams for approval before the service request or other task can proceed. This avoids “overlooked” email messages or the need to manually track approval status in a separate spreadsheet or project management tool. It also makes it easier to manage complex requests that require multiple levels of approval, such as from legal or finance.

The workflow automation software thus manages email communications and also logs approvals in appropriate departmental or enterprise applications, to ensure accurate cost allocations, keep the fulfillment process moving forward, and provide an audit trail of interdepartmental transactions.

## 4. Analytics

ERM not only simplifies and automates request management processes, but also creates a framework for continual improvement driven by constant measurement of service delivery efficiency and customer satisfaction. An additional function of the workflow automation software is to automatically record key metrics in the ERM process, including the elapsed time required to complete each step in a workflow process, to help identify and eliminate bottlenecks.

Survey management or enterprise feedback management (EFM) software can trigger context-sensitive surveys on the fly to systematically gather and analyze customer experiences to monitor qualitative metrics and improve service delivery management.

Service-performance monitoring and reporting tools allow managers and teams to monitor key service performance metrics, such as incidents created, SLA violations and self-service incident logs. Data is collected periodically or in near real-time from corresponding enterprise sources and often displayed in a graphical dashboard interface.

# KINETIC DATA

Data from all three systems—the workflow automation software, survey management application, and service performance monitoring tool—can be aggregated in business intelligence (BI) applications such as Crystal Reports and Cognos for advanced analytics.

## 5. Service Level Agreements (SLAs)

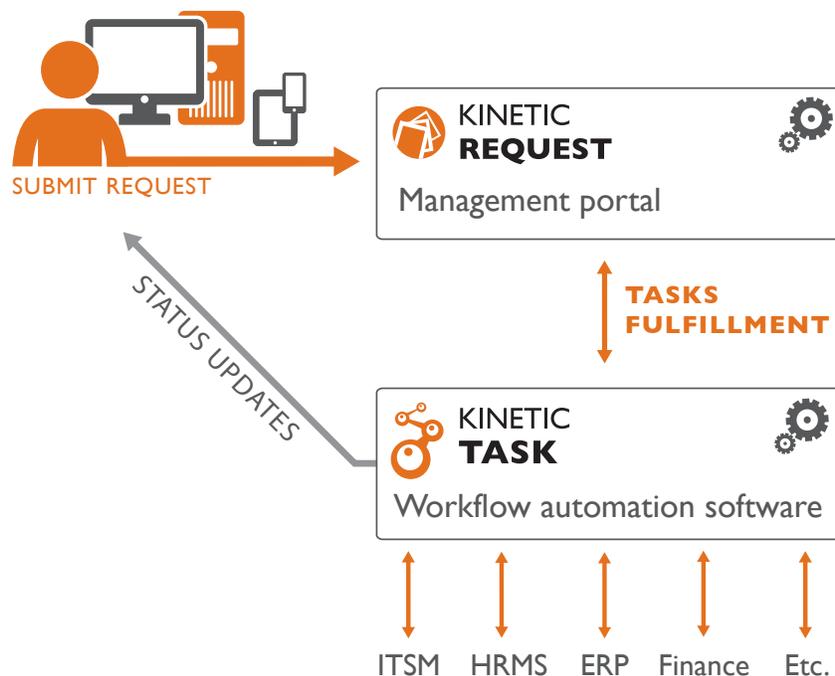
Service fulfillment times, particularly those involving IT groups, are often negotiated between service providers and service recipients. In an enterprise, SLAs cover all generic service-level-management issues common across the organization. Typically, they are agreed upon between service providers and customers and subject to periodic reviews. Since many service management issues are relatively unchanging in an enterprise environment, SLA updates may be less frequently required than in other environments. [4]

In the ERM approach, SLAs are handled differently in two fundamental ways. First, rather than periodic negotiations between service providers and customers, SLAs are based on actual service delivery times automatically recorded by the workflow automation software or other systems. This provides a more accurate and realistic approach to developing SLAs.

The second difference is that, rather than being static documents, SLAs in an ERM approach are a moving target subject to continuous improvement. This requires a combination of the metrics collected by the workflow automation software and the service-performance monitoring tool, as well as frequent context-sensitive customer feedback provided by survey management or EFM applications.

## 6. Status

One key benefit of ERM is that service requestors and managers alike get visibility into the current state of the progress toward completion of a task or delivery of a service or physical item. Since multiple systems may be involved, this requires workflow automation software that can be used to create processes that automatically read and update data from multiple systems or federated data sources (e.g., the purchase of a new laptop for an employee requires updates to IT management, accounting, HR, and other enterprise applications) and display fulfillment status at any time via the request management portal.



## 7. Chargebacks / Billing and Reporting

In addition to the elements described above, ERM must support other parts of the service management process, including chargebacks, or the assignment of the cost of the service delivery to the appropriate department; and the ability to aggregate and combine service measurements for advanced analysis and decision making regarding resource allocation, time- and cost-saving opportunities, and continual service delivery quality improvement.

Chargebacks (for internal services) and billing (for external customers) are managed through corporate accounting and finance applications such as SAP or Oracle. The workflow automation software must be able to manage data flows among these systems and other applications used in the ERM process to accurately assign costs to service elements, report at an aggregate and detail level, and produce and distribute invoices where needed.

The survey management or EFM application should provide actionable qualitative information for analysis and continuous process improvement. It should enable managers to automatically collect data specific to service processes (e.g., was the item delivered within the promised time window? Was it properly configured and operational before the technician left the premises?) rather than just simple, generic satisfaction metrics such as star ratings.

### Summary

ERM is “function-agnostic”—it can apply to any type of service (IT, HR, facilities, etc.). The first of the three core technology components required (request management portal software) should be flexible enough to manage any type of service item, and enable business function managers and non-technical business process owners to easily create, test, and modify their own service items and workflow processes, with minimal IT assistance.

The second core element (the workflow automation software) must have the ability to integrate with any data source (the third core element), and enable process owners to create automated processes with drag-and-drop simplicity to match the specific workflow requirements of any area in the enterprise.

The service customer has a single interface for requesting any type of service, at any time and from any device, and visibility into the status of the request, without needing to have any understanding of the specific back-end processes. Tasks are automated wherever possible, minimizing fulfillment time, labor hours, and the risk of errors due to manual data entry.

Unlike siloed request management systems (such as IT service catalogs), ERM uses a universal front end for any type of request and back-end business process automation of the key components of the service delivery process. The four main benefits of ERM are:

1. An improved user experience;
2. Centralization of business services;
3. First-time and automated fulfillment;
4. Leveraging of existing systems.

Most enterprises already have the core business software platforms (IT, HR, Finance, ERP) and BI/reporting tools in place to support an ERM strategy. The technology investment and implementation required is therefore more often one of “add and extend” rather than (the more expensive and disruptive) “rip and replace.” Off-the-shelf applications are available for request management portal development, EAI/workflow automation,

scheduling, service performance monitoring, survey management/EFM, BI/ reporting, and other specific functions within ERM as needed.

The end result of the ERM approach is faster service delivery and reduced costs for the enterprise; unified service item design and control across functional departments for process owners and managers; and a simpler, frustration-free experience for service requesters.

## About Kinetic Data

Kinetic Data creates business process software that delights its customers, making them heroes by transforming both the organization and the people who work there. Since 1998 Kinetic Data has helped hundreds of Fortune 500 and government customers—including General Mills, Avon, Intel, 3M and the U.S. Department of Transportation—implement automated request management systems with a formula that is proven, repeatable and ready to implement. The company has earned numerous awards for its superior products and support. Kinetic Data serves customers from its headquarters in St. Paul, Minn., offices in Sydney, Australia, and through a valued network of reseller partners. For more information, visit [www.kineticdata.com](http://www.kineticdata.com), follow our blog, and connect with us on Twitter and LinkedIn.

[1] See "Enterprise Request Management: An Overview" at <http://www.kineticdata.com/products/request/whitepapers/KineticRequest-ERM-WhitePaper.html>

[2] "Humanizing Business Process Automation: Optimizing Performance for Employees and Customers," Jesse Clark and Rachel Wentink, Interactive Intelligence Group, January 2012.

[3] "Master the Service Catalog Solution Landscape in 2013," Eveline Oehrlich and Courtney Bartlett, June 12, 2013. Forrester Research

[4] [http://en.wikipedia.org/wiki/Service-level\\_agreement](http://en.wikipedia.org/wiki/Service-level_agreement)