Best Practices for Migrating to a New Service Desk Platform

Strategies for Long-Term Success

Table of Contents

Executive Summary

The service desk plays a vital role in how the business' IT infrastructure performs, and thus how the business itself performs. Given this, the migration to a new service desk platform represents a critical juncture, one that can either propagate a lot of past errors and inefficiencies, or set the stage for long-term optimization. This paper looks at some key areas of service desk migrations and offers some best practices that can help ensure the transition yields maximum benefit.

Introduction

When service organizations decide to make a move to a new service desk platform, there's a lot riding on the migration. Here's why:

- First and foremost, the migration is important because of the critical role the platform plays. Today, IT underpins virtually every aspect of a business. By dictating the service levels the business receives, the service desk can either support or hinder the organization's business objectives.

- Second, this migration is not a trivial effort. Compared to other products and technologies, the deployment of a service desk platform requires a lot more effort than double-clicking on an installation file or even signing a contract with a SaaS provider. Even with the best service desk technology, the success of a rollout is still very much tied to the data, knowledge and workflows that go into the platform. Given the resources that need to be invested, it is critical to get it right.

- Finally, if ineffective processes are repeated or obsolete data makes it into the new platform, organizations will from day one be missing out on some of the potential benefits their new solution could be delivering.

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Given all this, the stakes of a new service desk migration are high indeed. While a solid service desk platform can set the stage for a variety of benefits, these platforms ultimately require proper implementation. In the following sections, we offer both some high level strategies and practical guidance for making the most of the opportunities afforded by a migration to a new service desk platform.

Key Strategies for Maximizing the Migration Opportunity

Within many organizations, a common scenario occurs: Executive leadership realizes the current service desk platform isn't serving the business effectively, and takes on the cost and effort of making a change. However, as they start the migration, individuals on the team look to hang on to the data and processes that they've been accustomed to. While it's understandable, this mindset can fundamentally limit the benefits of the new platform.

Project leads need to start with an understanding that, beyond any limitations of the prior platform, there may have been other aspects to the prior implementation that were sub optimal as well. Be sure to use the opportunity presented by the service desk platform migration to take an objective, fresh look at everything. Make sure you don't let ineffective workflows, unsustainable processes or obsolete data from the old deployment infect the new platform.

Realize that there are good reasons for migrating from the old platform. Take the time to fully understand all the aspects that weren't working and ensure those mistakes aren't repeated. Take the opportunity to clean up, refine and optimize wherever possible. Align approaches as closely as practical with the new platform, so you can fully leverage the capabilities of the new tool.

In the following sections, we look at several key facets of service desk migrations, offering specific guidance for optimal approaches in each area.

Migrating Tickets

Early in the planning process, it's very common to hear team leads say that they want to migrate their tickets from the old platform to the new. While this approach may be possible, it is definitely not a best practice. In fact after years of working on service desk implementations, we've never seen a ticket migration have the outcome the customer desired. Following are a few key reasons why this is true:

- Project leads need to consider why they want old tickets imported: it's largely all about the ability to do analytical reporting. From a best practices perspective, whether on a service desk or any other transactional system, we advise against doing historical reporting on a production database because of the performance hit incurred by this approach.

- Across the board, each ticketing system has a unique way of measuring the ticket lifecycle. To a large extent, meaningful reporting is based on metrics relating to ticket transitions. For example, service desk teams want to track durations between when service desk tickets are opened to when they are assigned. Because each platform segments these transitions differently, just about every time you import tickets from one system into another, it will skew, if not completely destroy, the accuracy of historical reporting in the new system.

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- As mentioned earlier, when customers move away from a service desk platform, there is a good reason for doing so. You don't want to end up configuring the new system with the same tickets, which can result in a repetition of some of the failings that were causing issues previously.

In making the transition to a new platform, project teams can take a couple different approaches. One option management can consider is making a hard cut over: managing existing tickets in the legacy platform through to their completion, while at the same time migrating to the new platform and handling all new tickets in the new system. After a specific length of time, any tickets that remain open in the old system can be rekeyed in the new platform.

Depending on the ticket volume in your organization and other migration considerations, another option that may make sense is to migrate only recent or active tickets. Before doing so, we advise doing some testing to compare manual rekeying of tickets versus an automated batch import. In many cases, particularly when organizations can hire effective temporary labor to do the data entry, it is cheaper, faster and more efficient to rekey tickets into the new system.

To achieve migration and reporting objectives, we advise that you implement a data mart for retaining and reporting on historical ticket data. For one larger organization, which had undertaken several platform migrations, it made most sense to develop a true data warehouse that aggregated not only historical ticket data from multiple prior ticket management systems, but also ongoing feeds from their current service desk platform. By implementing a process for standardizing data from multiple systems in the data warehouse, the company was able to fully leverage its data, without compromising the integrity or performance of the current service desk.

Migrating Workflow

When it comes to migrating workflows, our advice is simple to sum up: don't do it.

If your organization is parting ways with an old service desk platform, it is doing so for legitimate reasons, namely because it wasn't working for your business. Workflow is such an integral and vital piece to a platform's ultimate success, it is important to start with an open mind and a clean slate. While old workflows may be a familiar, known quantity, and thus hold some appeal, these old habits can be a hindrance to the ultimate end goal: process optimization.

There can be many different workflows that ultimately yield the desired outcome. When moving away from an old platform, it's critically important to focus on objectives and the processes that facilitate those ends— without being limited by how things used to work. Further, it's important to adopt workflows based on the new platform's capabilities and strengths, which will most likely vary significantly from those of the prior platform.

This is especially true when migrating to Nimsoft Service Desk, which is built based on proven, industry-standard best practices. Rather than forcing you to repeat suboptimal processes or invent new approaches, this solution makes it easy to leverage proven workflows. Consequently, you can build based on a proven platform, and configure it to the specific users and needs of your organization.

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Migrating Knowledge Articles

Knowledge, and the ability of the team to leverage it most fully, is a critical success factor for any service desk deployment. The service desk is inherently about identifying problems and finding solutions, and knowledge repositories play a central role in how well an organization addresses this objective. Toward that end, organizations need to most fully leverage valid content and migrate it effectively into the new platform. The keys here are validity and effective migration. Following are some key considerations for each area:

Content Validity

In our experience, pretty much every organization readying for a migration has some percentage of knowledge content that is old and in need of updating, or completely obsolete. This is often true even if organizations have automated processes in place for archiving and so on. This migration represents an ideal juncture for managing a thorough review and clean up of the knowledge base, including content, objects, files, links, technical features and specifications, screenshots and so on.

When it comes to validity, there may be some categories of knowledge articles that are tied specifically to the old service desk platform itself. For example, articles may focus on helping with issues that end users may encounter with the old platform's self-service interface, platform bugs or compatibility issues, or platform-specific workflows. These types of articles will either need to be updated or removed from the source content being migrated.

Effective Migration

Migrating knowledge content is primarily a mapping exercise. The old and new platforms will invariably have different fields, nomenclatures and functions, so it will be critical to ensure fields from the old platform are mapped to the best field in the new platform.

In this effort, a common issue that we've seen organizations encounter has to do with searching, which plays a vital role in the service desk's utility. Thus, it is important to take time to understand the specific search capabilities and methodologies of the two platforms, which can affect how you should map knowledge content.

For example, Nimsoft Service Desk offers keyword-oriented search. In this platform, when a new article is created, all words submitted in the short description field are automatically entered into the keyword field. On the other hand, another service desk platform may have a facility for doing full text searching of the text submitted in a long description field. If migrating from this kind of platform to Nimsoft Service Desk, it is important to devise a process for mapping a subset of the long description into the keyword field in Nimsoft Service Desk, or manually entering any relevant keywords. This is essential in ensuring searches yield useful results. For example, a short description field may refer to an issue as "laptop crashing", while users may employ another phrase to describe the issue, for example "blue screen of death". In this scenario, the user's term may only appear in the article's long description. Therefore, if end users will have access to searching, or agents will need to be able to locate articles based on user terminology, the project team will need to devise a process for mapping the relevant keywords that reside in the long description field.

Migrating Configuration Items

Where practical and efficient, it is important to leverage the configuration items held in the outgoing service desk platform, and map them to the new platform. However, this is only true if the configuration database in the old platform was effective, current and practical. If the old database and process wasn't working before, first, you don't want to import, and second, it is important to figure out why it wasn't working.

Some platforms make system updates difficult, which may mean it makes sense to start with a new database on the new platform that does facilitate efficient updates.

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Alternatively, an organization may be trying to track more information than they can realistically control. While a resource-constrained IT organization can build an incredibly elegant and detailed CMDB that houses every detail any user may want to know, the ultimate catch is, who will update it? As a best practice, it is important to physically audit items and attributes, at least annually. While supporting the CMDB can be one of most valuable efforts your organization undertakes, it can also be one of the most time consuming.

Just because you can or had been tracking some detail doesn't mean you should do the same with the new platform. It's important to build a CMDB and work toward a scope and level of detail that can be practically maintained over the long haul. Another way to think about it is this: there are five levels of ITIL sophistication, and while it's important to leverage ITIL where appropriate, that doesn't mean every organization can or should be striving to be at a level five. For some organizations, reaching level two may be best.

Leveraging Automated Discovery Platforms

When it comes to migrating CMDB data, here's an important aspect to consider: Today, most organizations use some type of device that does automated discovery. If practical, we advise importing directly from that source into the new service desk platform, as opposed to migrating data from the old service desk platform to the new.

By importing directly from the discovery device to the new service desk platform, your organization can eliminate a point of failure and a source of errors. This direct import may require some integration effort, however. In this regard, customers running Nimsoft Monitor and Nimsoft Service Desk, can enjoy a significant advantage. Nimsoft Monitor, which has robust, automated discovery capabilities, is tightly integrated with Nimsoft Service Desk. This integration means that the two solutions work from a common CMDB. Consequently, Nimsoft Monitor can automatically discover infrastructure changes and update the CMDB accordingly, and Nimsoft Service Desk will always pull from this current database.

Configuration Data

Typically, configuration data can be broken down into these categories: users, groups and roles. Following are some guidelines and considerations for each of these areas:

Users

When importing users, you can choose from different paths. The first, and most straightforward, is to take the user list directly from the old service and import it. Typically, this is a simple export and import process.

Where it becomes less straightforward is in organizations that are looking to enable single sign on (SSO) or that are looking to synchronize with LDAP or Active Directory. In these cases, there is another system that is the source of user permissions and policies, and, instead of importing directly from the new to the old service desk platform, it is preferable to set up an import directly from the directory source.

Roles

Because so many details around roles are dependent on, and specific to, a given service desk platform, this is an area that is rarely imported from one platform to another. Generally speaking, given the distinctions common among platforms, this would require significant effort, and would provide little value, if it doesn't detract from the objectives of the new platform completely.

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Groups

Here also, a direct import most likely won't make sense. Your organization may have a well-established definition of groups and what their respective capabilities should be. When importing users, you can also import their group membership, ensuring that group membership nomenclature is aligned with the new platform. Then, you only have to do permission setting at the group level, which in most effective service desk platforms should be a very straightforward exercise.

It is also important to note here that Nimsoft Service Desk comes pre-packaged with a well-defined group and role structure that works. Most customers moving to Nimsoft Service Desk are best served by taking this default structure and modifying it to suit their specific needs.

Conclusion

The migration process represents a critical juncture for the support team, and for the business it supports. At this juncture, team leadership has a choice. They can repeat some of the same mistakes, and significantly limit the potential benefits realized from the new platform. Alternatively, they can build on prior experience and optimize around the capabilities of the new platform, which will set the stage for fully leveraging the new solution's potential benefits, both in the near term and long term.

About Nimsoft

Nimsoft is a global leader in IT Management-as-a-Service. The company's lightweight ITMaaS solutions make it easy for enterprises and service providers to implement comprehensive, adaptable monitoring and service desk capabilities essential for managing today's dynamic computing environments. Learn more at www.nimsoft.com.

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