



How to easily verbalize a filtered service catalog?

Automated Requests Centralization | A 6-step Guide



Introduction

The concept of a service catalogue, or list of service options, is integral to the process of delivering services. The process is documented as an exhaustive list of the services that an organization offers to its employees or customers. The purpose of the catalogue is also to publish those services and make them available to consumers, especially via self-service portals.

Various service attributes can be defined, although they vary from one company to another. Among these attributes, we find the description of the service, the service category, service level agreements, service managers, the cost and price of a service, and other information about availability.

The clear consensus is that a service catalogue is an integral part of portfolio management, as it contains the commitments and investments made and projected by the supplier of those services. However, many organizations are not ready to document in detail all the services they offer, even though they recognize the operational importance of the process and see it as an opportunity to set out all their service options.

A service catalogue, which is a structured document grouping all the details of the services and options, surely offers lots of benefits. However, you first have to gradually integrate the concept and, above all, verbalize inclusions/exclusions properly, to make it work the way it should. This guide introduces the basic concepts and is aimed at organizations that do not yet have a detailed services structure. Some points will also be of interest, however, to businesses that already have this type of structural maturity.

Here, then, is a 6-step guide to shed light on its verbalization and organizational integration.



Filtering is a Must

More than just a catchword, a service catalogue is essential for fast, quality delivery of services. Companies have complex systems and comprehensive software for managing services but sometimes ignore their own. The clarity of this service offering lies in the development of a catalogue, which will simplify the mash of processes, and be an integral part of both its ITSM solution and its service desk. At top level, this process provides the following benefits :

- Increase in user satisfaction
- Improvement in efficiency of execution
- Automation of support processes
- Rationalization of resources and operating costs
- Greater flexibility in service delivery

In addition to these benefits, a catalogue can take different forms depending on the organizational context. By grouping options, a comprehensive service offering should sometimes be filtered to permit a specific proposal for each target customer. The catalogue is thus turned into a group of catalogues associated with different entities.

For example, an educational institution will not offer the same services to its faculty and administrative employees as it does to its students.

When verbalizing its catalogue, the institution will have to filter it and split it into different service offerings. Filtering allows high efficiency and greater customer satisfaction in a self-service environment.

We will look at catalogue association in the last step of this guide.



1

Identify the Managers

These multiple, filtered catalogues must be managed by a team with some predefined roles. The initiative to install a catalogue can come from an IT manager, HR manager, a service level manager, or any other manager in service delivery. Involving various levels of the firm (not just senior decision-makers), will allow you to better identify the attributes connected with the services offered by the business. Suggestions from customers are also a massive advantage in verbalizing the catalogue. After all, it's about meeting user requests (internal and external).

Catalogue Manager : Is responsible for maintaining the catalogue, and managing change requests.

Service Owner : Monitors the service from start to finish. On the customer side, he is the contact who defines and manages the services. In-house, the service owner represents the customers and defends their interests.

Process Owners : When defining the service catalogue, it is important to talk with the owners of the processes, as they are the ones who:

- Are in charge of designing and implementing processes and results
- Provide the resources for the process to operate efficiently
- Are responsible for delivering the service.



2

Identify the Requests

Once the managers have been identified and the stakeholders informed of the project objectives and timeline, these working groups should be assembled. This teamwork initiates the first step in creating and developing a list of requests. As these are not always documented, some organizational thinking is required.

This is the time for brainstorming! Bring together the stakeholders in the service catalogue project and start by drafting a list of service requests. You will then have at your fingertips a more-competent document to use for grouping service requests.

Definition and Examples

A user sends a service request for information, advice, change, or access to an IT-related service.

It is important to verbalize the requests so they match what users tend to ask for: a contract renewal request, a move request, an equipment purchase request, etc.

NB: Note that organizations that have already set up a detailed structure of their services do not need to make this preliminary list. As they have this structure at hand, they can publish their catalogue directly for consumer purposes and go ahead to integrate it into an ITSM tool. See step 6.



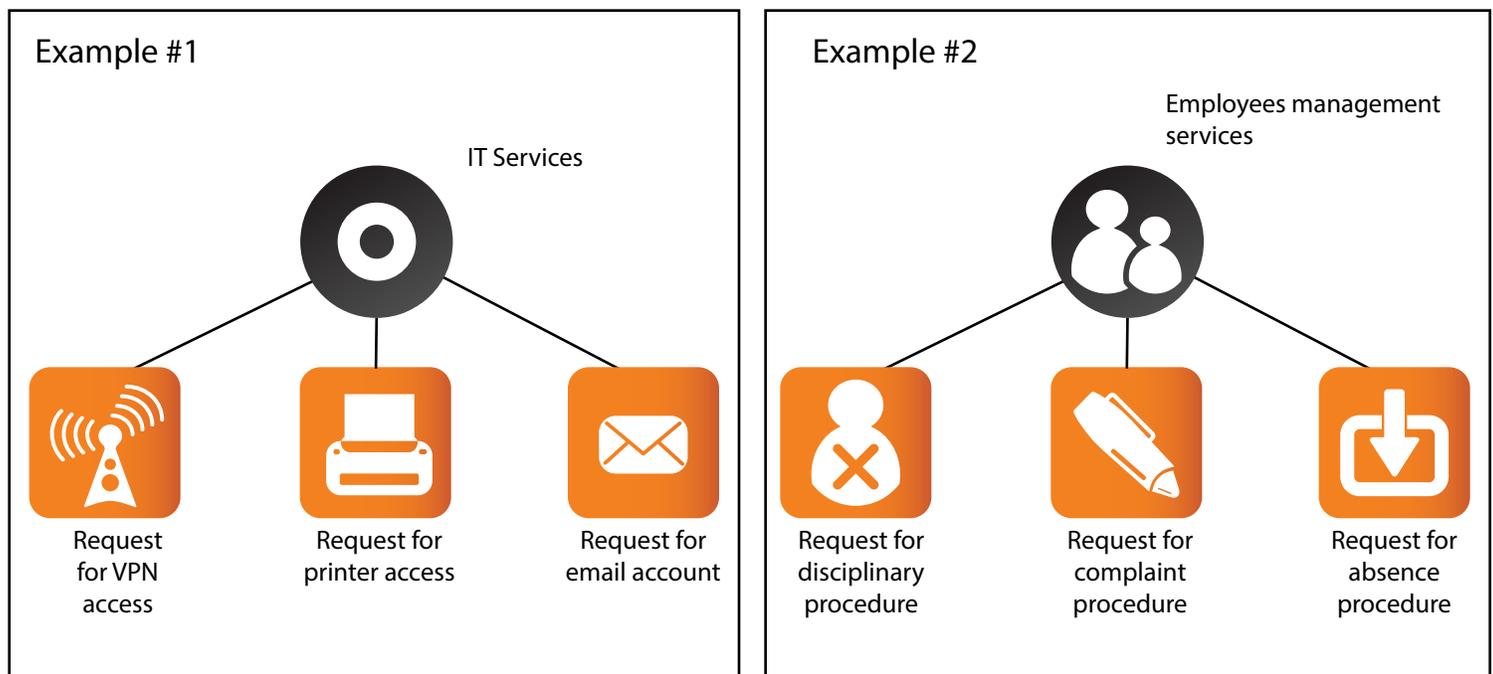
3

Group the Service Requests

Start simply and gradually. The key to success in setting up a catalogue is the quality of verbalization. Democratizing this process within an organization sometimes takes a big effort but it pays off as, ultimately, all stakeholders see the results and value-added benefits.

Defining the Services Offered

Third, you need to define the services to be included in the catalogue by grouping the verbalized requests in step 2. This means interacting with the project stakeholders, including the customers. The customers will put their needs and requirements in commonsense terms. For each service, it is preferable to talk with a specific group of users in order to grasp the specifics in terms of requests and service delivery. It is thus essential to keep the same, simple nomenclature/terminology for all the groups concerned.



4

Group Services into Categories

Associating Services with a Category

Depending on the types of support offered to your internal or external customers, managers should list the categories for all the service types identified earlier in step 3.

Note that, once again, it is preferable to use simple terminology when naming the categories. The terms and nomenclature must be understandable by all departments and customers, who will use the services included in the identified categories.

"Associating" means identifying groups of services that have features in common. Depending on the maturity of your processes and services, you might end up with a series of categories such as:

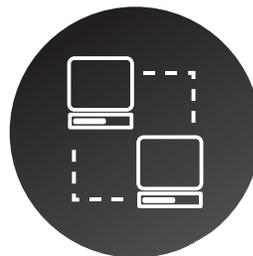
- Application services
- IT services
- Security services
- Documentation and data services
- Infrastructure services
- Teleworking services
- Maintenance and upgrade services



IT



Security



Infrastructure



Maintenance

5

Create a Workflow

Completing these first 4 steps gives you a catalogue that works, but the next steps are to document the requests and deepen the process operationally.

This means that we need two creation/documentation steps for successful verbalization of service requests. The first is to create tasks, i.e., list a series of actions or workflow to be done by one or more resources to fulfill a request.

These associated tasks can vary from one company to another and one organizational context to another. Inside most multilayer companies or institutions, these actions take the form of approvals, rights given, or various types of validations.

For a request to purchase computer hardware, for example, the catalogue manager may specify the following actions:

- 1 Approval of purchase
- 2 Receipt and preparation of the equipment
- 3 Delivery
- 4 Training / use



6

Create Personalized Fields

The second prerequisite is to identify personalized fields and associate them with the requests to be included in the service catalogue. This step supports the flexibility of the catalogue and its personalized use. Indeed, the service offering and the requests associated with it evolve and change over time. Information may later be added to a request.

In other cases, more-specialist information has to be indicated to ensure quality and conformity.

In the case of a new-hire-start request, the requestor will need to specify certain essential attributes and access a web portal to send the information to the resources concerned. The intuitiveness and effectiveness of this step is crucial to ensure user satisfaction.



The image shows a tablet displaying a webform interface. The title 'Webform' is prominently displayed in orange. Below the title are four input fields, each with a label in orange text: 'Last Name', 'First Name', 'Supervisor', and 'Start Date'. At the bottom of the form is a dark grey button with the text 'Submit request' in white. The tablet's status bar at the top shows the time '2:15 AM' and battery level. The right side of the tablet shows standard Android navigation icons.

Filtered Catalogues Association with an Entity

Creating the Catalogue

After verbalizing the various elements described earlier, you need to associate the requests with the catalogue. Then, depending on the organizational structure and the various target customer groups, it will be possible to filter the catalogue by entity, department, or user profile. Specifically, the catalogue and its group of requests will be associated with a given entity, for optimal use of the catalogue and service requests.

Publication and Use

Publishing the catalogue not only allows the service requests to be used, but also automates the processes and business rules, increasing internal efficiency and boosting customer satisfaction.

Summary

1. Identify the managers
2. Identify the requests
3. Group the service requests
4. Group the services into categories
5. Create tasks (workflow)
6. Create personalized fields

About C2 Enterprise

Software editor and IT service management (ITSM), help desk and service catalog solutions distributor, C2 Enterprise guarantees an implementation that is faster than the market average, all while aligning with the best practices and frameworks of the industry.

C2 ATOM is an all-in-one web-based service desk software, designed for helping IT support, customer service, project development teams and managed service providers with service delivery activities. Available both in Cloud and On-Premise model, C2 ATOM modernizes your ITSM practice to provide extraordinary results.