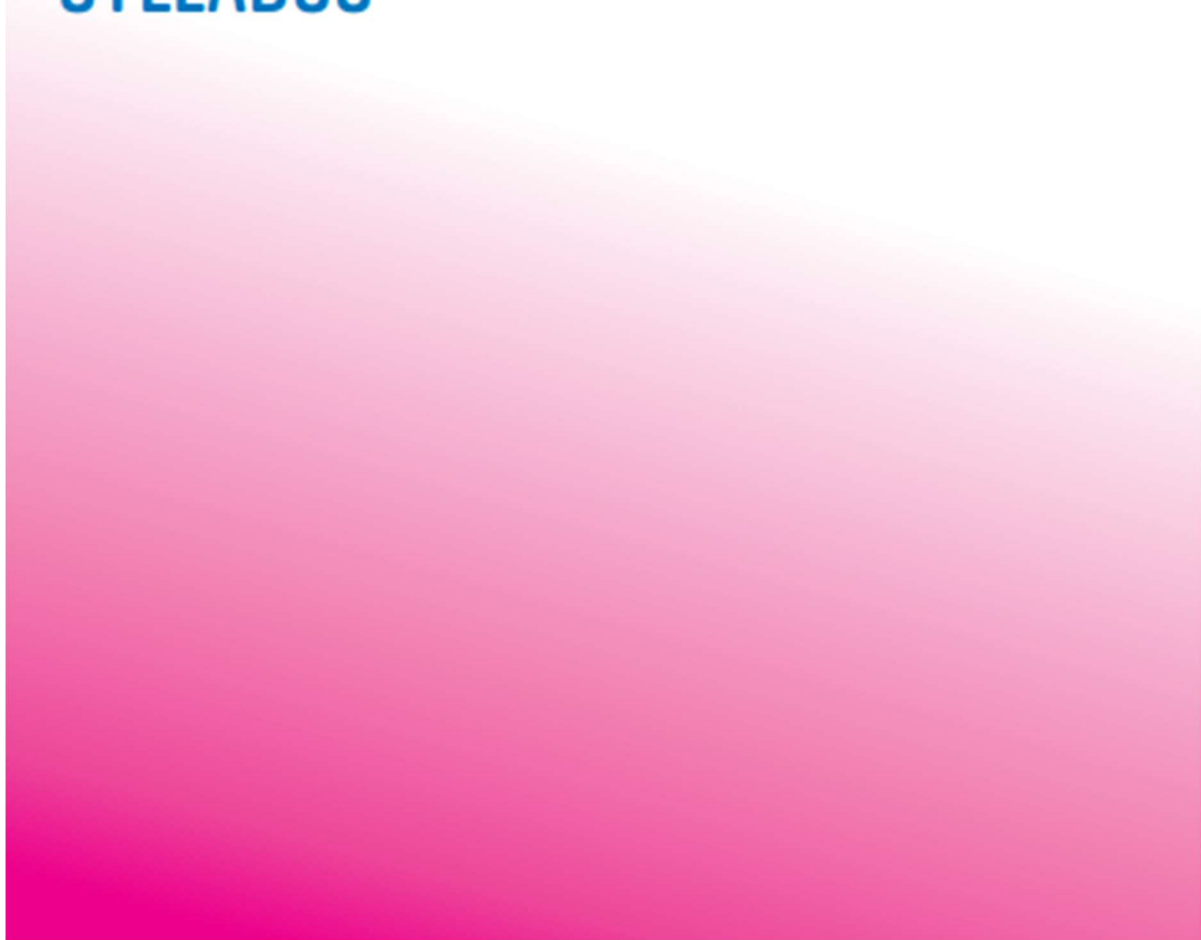# EZ2BGR8
SERVICE MANAGEMENT

INNOVATING THE SERVICE PORTAL
SYLLABUS

Introduction

How would you like to create a service portal your employees (customers) love? Innovating the Service Portal provides training in unifying a holistic service design, defining services for offer, and a human-centric digital design approach to building a customer-focused service portal and service request catalog.

The syllabus describes the program in detail and enables a consistent training and exam process to ensure students have the necessary competence to apply digital design and implementation concepts to successfully design and construct a service portal, including a service request catalog.

Students need to complete and study all units described below. The courseware includes practical exercises and lab work to ensure concepts can be used. It may be used entirely as provided, with no additional materials needed. However, an online copy of the book "Service Management On-Line: Creating a Successful Service Request Catalog" is included with the course license.

Discussions and exercises, some of which may be done as homework, are included in this guide. The timing for the class is rigorous, and every group proceeds at a different pace, so instructors should balance the recommended time stated with the status of the course. Some exercises may be started in class and completed as homework or deferred as a "warm-up" to start the next day's lesson.

This course is recommended for three days. Students are granted a certificate upon successfully completing all module exams.

Please note all cross-references in the table below are to sections (e.g., 1.1) or chapters in Service Management Online (SMO; 2016).

Unit	Description
Day 1	

SMO 1.0	**Innovations in Support – What Does Great Support look like?**
	
	This unit focuses on introducing the importance of online and digital support channels in an overall design program. After this unit, students should be able to demonstrate an understanding of the following:
	
	• How does the Service Catalog fit into IT operations and strategy
	• Why do XLA practitioners think the portal provides a poor experience?
	• Turning your portal into a great user experience by understanding:
	    o The difference between multi-channel support and omnichannel support
	    o Ways in which new support technologies like lockers and walk-up centers integrate with portals and improve the user experience in a hybrid work environment
	    o Automation and true self-service vs. online requests
	    o The portal is not just a place to log tickets

SMO 2.0	**What's in Your Service Catalog?** This unit helps students understand the role of the service catalog and the difference between the service catalog and the service request catalog. It • Describe the service catalog and its role in providing support as well as the difference between the service catalog and service request catalog (Service Management Online Chapter 1.1) • The service request catalog and its components, including its role in supporting other service management processes (Service Management Online Chapter 2.2) • Define a service (Service Management Online Chapter 1.2), map the service value stream • Documenting services, and service offerings, including service packages, experience/service level packages (Service Management Online Chapter 1.3) • Understanding how service offerings form the building blocks for online service catalogs (Service Management Online Chapter 1.4) • Building a service taxonomy that is clear to end users
	Day 1 Exercises (Estimated 2 hours): 1. Review the case study organization (15 minutes to read, 15 to discuss) 2. Define business processes and services for the case study organization (30 minutes) **3.** Define technical services for the case study organization (30 minutes) **4.** Create the taxonomy for the case study organization (30 minutes)

Day 2	
SMO 3.0	**Defining an Innovative Portal Experience and Service Request Catalog** There are different approaches to integrating the service catalog with service requests. This unit describes the options and weighs approaches. Students must be able to demonstrate an understanding of the following areas: • Innovations in Service Catalog Design: the vision of the service catalog as a full-service enterprise portal (Service Management Online Chapter 3.1, 3.2) • Common pitfalls in catalog design (Service Management Online Chapter 3.3) • Best practice in Request Design (Service Management Online Chapter 3.5) • Identifying Personas, Stakeholders, and Providers (Service Management Online Chapter 4.2) o Documenting User Journeys with Digital Blueprints • User experience in request design (Service Management Online Chapter 3.6) o Product features to consider in request design o Understanding the "on stage" experience and how it contributes to user experience excellence vs. designing for the "backstage" (fulfiller) experience o Automated workflows and automated fulfillment • Expanding the service request catalog design to an entire enterprise portal (Service Management Online Chapter 3.6.4)
SMO 4.0	**Employee Transitions and Security** The service portal, integrated with identity access management and human capital management systems, is a critical component of a great employee experience and ensures appropriate security measures exist in the organization as people are onboarded, change positions and leave the organization. Students will need to demonstrate the following knowledge: • The reason employee transition automation is critical to security • Integrations needed to automate employee transitions • The concept of birthright provisioning • Portal and request design features for employee transition management, including those employees' needs that are not part of identity access management (like software, hardware, badges, desk space, etc.)
	Day 2 Exercises (Estimated 2 ½ hours): 1. Homework review discussion (15 minutes) 2. Identify and discuss personas for the case study organization (15 minutes) 3. Identify personas and stakeholders for your organization (Homework) 4. Practice creating journey maps and future state design for a request/process (1 hour) 5. Practice creating journey maps and future state design for an employee transition (1 hour) 6. Create a transformation project approach for your organization (Homework)

Day 3	

SMO 5.0	**Designing and Planning a Service Request Catalog Project**
	
	This unit is designed to ensure students have sufficient understanding to plan and build a service request catalog. They need to demonstrate knowledge of how to perform the following:
	
	• Meeting with stakeholders and establishing their services and request pipeline (Service Management Online Chapter 3.4)
	• Project Planning: Considering VUCA and Agile (Service Management Online Chapter 4)
	• Managing the development of a service request catalog using the **Request Catalog Release Management Framework** (Service Management Online Chapter 3.4)
	    o Sprint planning in an Agile approach (Service Management Online Chapter 4.3)
	    o **Exercise:** *Discuss a high-level implementation approach: will you work with one provider at a time and group requests logically? How will you deliver the pipeline?*
	• Integrating governance, user experience, and XLAs into long-term catalog management (Service Management Online Chapter 3.7, 3.8)
	• Organizing for success, roles for a catalog management program (Service Management Online Chapter 7)
	• Tool selection and MoSCoW

SMO 6.0	**Adoption, Measurement, and Continual Improvement**
	
	Organizational change management and adoption are critical to the initial success of a service request catalog initiative. Using measurements for continual improvement will ensure continued growth and development so the catalog doesn't become stale. Students need an understanding of the following areas:
	
	• **Adoption Planning:**
	    o Defining audiences using personas and defining the best way to reach them
	    o Determine the timing and approach for adoption strategies and the materials and artifacts needed for the campaign
	    o Determine the launch style: big bang, phased by groups with improvements
	    o **Exercise:** *Create adoption programs for several of the personas identified at the beginning of the workshop. Consider the approach and timing for each persona as well as the types of artifacts that will be used to reach them*
	• **Measurement and Continual Improvement**
	    o Understanding metrics and a metrics development framework
	    o Metrics for the Service Request Catalog (Service Management Online Chapter 6)
	    o Catalog improvement programs (Service Management Online Chapter 6.3)

SMO 7.0	• **Conclusion and Wrap Up**
	Note: day 3 is intentionally left light to allow for overflow topics
	    o Open discussion, questions
	    o Sample exam (at least one sample exam should be included in the coursework)

	Exercises (Estimated one ¾ hour): 1. Discussion re. students' transformation project approaches (15 minutes per exercise) 2. Using MoSCW to define tool requirements and review students' current tool (15 minutes work, 15 to discuss) 3. Designing stakeholder adoption programs (15 minutes work, 15 to discuss) 4. Creating metrics for the case study organization (15 minutes)