⚡ Jira Service Desk

Ready your Teams to Deploy and Change at Scale

Atlassian's Jira Service Desk presents a near-intimidating amount of options on how to tailor an ITSM solution that fits both your needs today and is continually flexible to adapt to tomorrow's unknown needs. It's a great opportunity for digital transformation and process improvements. This guide gives teams an outline to prepare the people, processes and tools involved in such a task.

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Jira Service Desk:
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Great news! You're at the right moment in time to transform Service Management in your organization, and to create a platform that boundary teams (HR, Marketing, Finance) will want to use their own versions of it to exchange work and drive accountability themselves. But grand ideas around future-state IT transformations only take you so far. Today's day-one, and it's the time to take advantage of a framework to help with recognizing and controlling data points to inform future improvements, categorizing sources of demand, identifying service behaviors, gathering buy-in, considering the requestor journey, and building workflows representing processes (however complex and diverse they are) that gets $#%! done. This guide is here to prep you and your team for a Jira Service Desk solution that grows with you.

Have doubts about Jira Service Desk's fit or capabilities? Rest assured.

Without question, Atlassian software presents the standard for enterprise collaboration applications that allow for continuously manageable customization AND proven scalability. Jira Service Desk is Atlassian's fastest-growing product, it's ITIL-certified, and is deployed as an ITSM and Business Service Management solution at Fortune-50 firms & startups alike. No other ITSM tool has such wide-ranging use cases.

Jira Service Desk excels in providing a simple portal for teams to open their catalog of services. It provides deep and highly flexible options for organizing and speeding agent-side work (smart SLAs/queues, logical automations based on conditions, and more). In terms of cost, it's not the 800-lb gorilla you're used to (ie. ServiceNow), and it doesn't take a .Net Developer to change over time. Atlassian bends to the way your team works, not the other way around. Moreover, administration of Atlassian tools is within your grasp. If not, there's Atlassian Solution Partners (like Trundl) who can help. **Let's help you ready your teams first.**

The Cost of Bad Process

- Squandered time is gone forever. Context-switching, lack of visibility, decision ambiguity and waiting on notifications are all costly, either in dollars or opportunity

- Your team's morale thrives where engagement, communication, and autonomy are high. Bad processes inhibit all of those.

- Drip drip drip. When the above happens, quality of work suffers, & good people leave your company.

Set the Stage for Process Clarity

This is the critical time (and your opportunity) to get your IT team together and discuss how work is really done. You're about to deploy a solution that can map tribal knowledge and process idiosyncrasies.

This is the time to whiteboard the relationship between teams, sources of demand, types of requests, workflows, and any common conditional logic around manager approvals and areas where automation could save time (auto-transitions, auto-complete).

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When process discussions occur, you need to be prepared for occasional pushback. This may be on internal debates on simply defining the current process (management and individual contributors may have different ideas of reality), but also it is very common for pushback from your most valued employees. When you ask direct questions about what they do, how, and why, it can be seen as either scrutiny or a threat to their control over the balancing act that is their job. Let them know Jira Service Desk is a platform able to relieve them of stress and return work-life-balance.
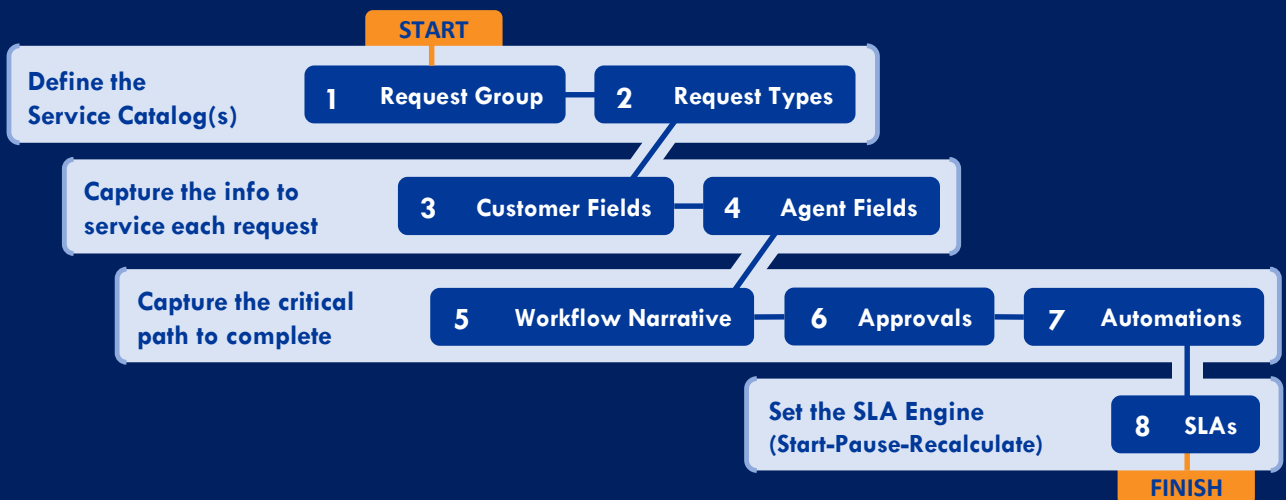
There are two stakeholder types you'll be addressing. One approaches their tasks in terms of steps, and a traditional process flow. They focus on internal business activities and take comfort in them. For the other group, the intended outcome is the focus, and it varies with circumstances. Here's your time to listen to, and build a solution for, both audiences.

Gather ITSM requirements for today, knowing it will continuously change.

A general recommended practice is to handle Atlassian tool deployments much like you would a software product of your own (Agile Change Management). Don't boil the ocean or try to over-engineer… start with a minimum viable product that a target IT team can use and get used to. Like any new ITSM solution, there's new vernacular and UI to learn, and plenty of "it would be cool if…" and "I wish it could…" questions. We liken it to building a college campus without the paths… wait and see where the grass is worn from where the students commonly walk. Only then it's the right time to pour the concrete paths. Be prepared to build a continuous improvement backlog (in Jira Service Desk itself) that your team can use. It's great for team buy-in, and unlike other ITSM platforms, Atlassian tools are meant to be built organically, from the bottom-up, and very cost-effectively.

Got your team together? Organize your ITSM requirements this way…

Collaborate with your team in a stepwise manner. Based on findings, it will have a cascading dependency and a configuration requirement in Jira Service Desk. The following will help you with each of these elements.

START

Define the Service Catalog(s)

1. Request Group
2. Request Types

Capture the info to service each request

3. Customer Fields
4. Agent Fields

Capture the critical path to complete

5. Workflow Narrative
6. Approvals
7. Automations

Set the SLA Engine (Start-Pause-Recalculate)

8. SLAs

FINISH

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Request Groups

Think of Request Groups mainly for helping customers find what they need easily from the customer portal. Natural/logical groupings, if by type or aligned to support groups. If you want groups to appear on your Jira Service Desk portal, you'll need more than one group. Version 1 doesn't need to utilize Request Groups, but rest assured, as more teams use the platform, they'll ask for their own portal, or for their services to be included in the catalog. This is particularly helpful if you see different service acting as different projects in Jira.

Request Types

Request Types are differentiated by the information you need to gather. Multiple request types can be mapped to a single workflow (process to complete), but there may be completely different operations or dependencies. Work with your colleagues to whiteboard everything your team owns and provides services for. Map them out, group them if needed. Some you may want to suppress or deflect... there's plenty of opportunities in the future to incentivize or de-incentivize customer behaviors. The important thing is to get it all out there in black & white for all to see.

Customer Fields

Remember Jira Service Desk gives you near unlimited abilities to either report on, or drive productivity on logic from request data. If it's quantifiable, you can drive automation and other rules, so keep this in mind when you define Customer Fields for each Request Type. Some information needed will have to come from boundary teams or collaborators (ie. approvals, dependency work). Outline them here. Again, keep it simple. Focus first on the minimum amount of information needed to complete the ticket. Both Customers and Agents will appreciate simplicity. Let UAT and post-hand-off exposure lead your backlog needs.
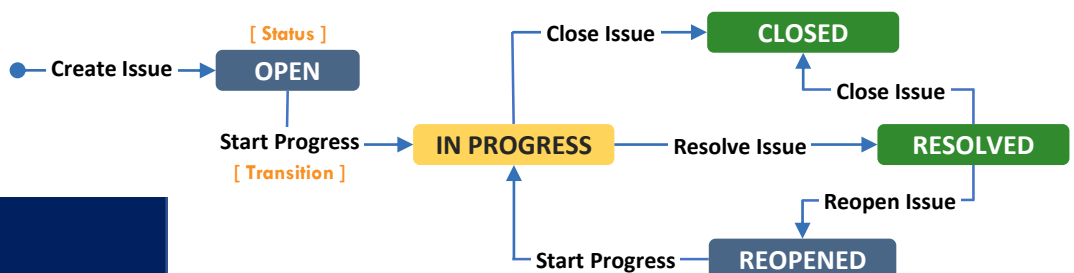
Agent Fields

Along the lines of Customer Fields, approach these fields in terms of not only having the basic fields needed to complete the ticket, but also certain fields that will be referenced or calculated from to drive future automation. Think of Agent-defined fields such as Root Cause, the t-shirt sizing of Urgency, Impact, Severity, or even Dates/Times of certain Agent actions. Often Custom Fields, these are crucial for further qualifying, validating, or organizing services.

Workflow Narrative

Here's the fun (and potentially challenging) step. Jira Service Desk provides ITIL-certified incident, problem, change and service request management templates that you can use out-of-the-box or customize yourself. We assume customization is a likelihood!

At this point you've gathered both the catalog of requests and the information needed to carry requests toward completion. The workflow defines for each Request Type the A) **Status** (the columns on a typical Kanban Board)) and B) **Transitions** (traditionally the button to advance the ticket). Below are some samples you can derive inspiration. NOTE: When you whiteboard these, keep in mind transitions that need human intervention, and others that can be automated. These will come into play later and are important!

Approvals

As you documented your Workflow Narratives, you likely came up with
transitions that involve authority interventions or collaboration subtasks. For each transition approval, note the expressed logic. Does the approval only need to occur based on what's being requested, like a replacement laptop? Does the approval need to go to a specific person, or a group of people based on title? It may be a combination of conditions from different fields. Fully articulating your approvals in Jira Service Desk dramatically reduces your time to resolution and also reduces your reliance on email as you collaborate.

Automations

With the fields captured from previous steps, you can apply nearly any logic on them as a means for reporting, filtering, and most importantly, automations. Remember that second group that focuses on outcomes based on conditions? Jira Service Desk has native automations, such as those for ticket deflection toward a knowledge

94% of organizations see agility and collaboration as critical to their success

BUT only 6% see themselves as highly agile

- Deloitte, Rewriting the Rules for the Digital Age , 2017

base (ie, "how to reset your password"). You can also automatically escalate tickets close to breaching SLA, auto-complete common tasks, or auto-triage types of requests/sources.

Native automation often isn't enough, so there's always the add-ons Automation for Jira and ScriptRunner. They offer automation capabilities that reference triggers, conditions, actions, and even rules tied to related issues. These are also useful in allowing teams to share workflows, but apply their own unique transition logic.

SLAs (Service Level Agreements)

SLAs are last because they're dependent on the results of the previous steps. SLAs are important not just for keeping performance promises to customers/requestors, but also to defend your team, and to spur continual improvement based on data. SLAs are the metric by which IT can "productize" their services, reducing turnaround times at a lower man-hour cost. The good thing is that SLAs are expected to evolve as customers/agents engage with the solution, so keep it simple at first. SLAs can be started, paused, and re-started during a ticket's lifecycle, document what those should be. Common ones are pausing SLAs for weekend/holiday scheduling, but Jira Service Desk offers an easy interface to add more if/then logic for how SLAs are applied. It's again up to your imagination.

Augment your Jira Service Desk

🔵 Opsgenie

Jira Service Desk has built-in Incident Management workflows and capabilities, however mature IR/IM requires both advanced monitoring capabilities, and highly effective response / collab technology to solve and learn from incidents. Check out Atlassian Opsgenie, it's an all in one game-changer.

DEVICE42

Jira Service Desk has built-in CMDB workflows, however Asset Management in the Atlassian space is driven by two popular add-ons, Insight and Device42. The latter has several modules, the core module will auto-discover a wide range of physical, virtual and cloud components, and provides a powerful asset/ issue tracking and relationship interface. It integrates beautifully with Jira!

7 REASONS Why ITSM Implementations FAIL

- Manish Rathi, NovelVista

- **Over Engineering**
- **Poor Collaboration Culture**
- **Poorly Designed Processes**
- **Ignoring CMDB**
- **Not following Application Lifecycle Management**
- **Deafness to Automation Opportunities**
- **Lack of a Good Functional Consultant**

Want to trial ⚡ Jira Service Desk

Email contact@trundl.com for licenses & knowledge on similar use-cases to your specific technology environment.

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A NOTE ABOUT HEROES:

Every business has heroes (you know them); It's someone in IT Support or a PM who is the process AND the tool when #%@! happens or it's crunch time. The business nearly stops when they're on PTO or sick… **Sound familiar?**

Chances are, that person is not compensated or appreciated for what they do (and they know it). If you use Atlassian tools (Jira, Confluence, etc.), there's thousands of ways to put their tribal knowledge and productivity into your Atlassian configuration. Reduce risks, empower others, and produce more.

Visit Trundl.com to start a conversation.

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