

## Article Paper

# How to Select an ITSM Toolset that Best Fits the Needs of Your Organisation



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## Introduction

My previous paper, [How to Deliver IT Transformation via Best Practice Service Management](#), touched on the fact that more and more clients that Fox IT®<sup>1</sup> engage with are looking to review the applicability and suitability of their existing IT Service Management (ITSM) toolset(s) as part of their wider transformation projects. Equally though, an organisation may have just decided that their own toolset has reached the end of its 'shelf-life' and want to upgrade to something more suitable for their needs.

This paper is intended to highlight the key activities that organisations should follow before committing themselves to a decision that end-users will typically have to live with for a considerable number of years. The following key areas will be covered in more detail in this paper:

1. What is the toolset strategy – e.g. SaaS, On-Premise, Hybrid?
2. Functionality requirements – what does the toolset need to be able to deliver?
3. Vendor selection
  - a. narrowing the whole field to a select group
  - b. identifying which vendor best meets the requirements of the transformation objectives
4. Making your ITSM toolset decision

## ITSM Toolset Strategy

Before even entering into any discussions with prospective vendors, an organisation should first define its toolset strategy. For example, does the solution need to be externally hosted (e.g. SaaS – Software as a Service) such as to reduce operational costs; or does it need to be hosted 'On-Premise', such as when security of data is an important factor. Also, will it be 'in-house' and contained within the boundary of the organisation, or perhaps used to manage workflow across a multi-supplier model e.g. SIAM.

Some organisations rely on in-house developed solutions or a combination of manual processing and technology; for the purpose of this paper, I'll make the assumption that the strategy to be taken is to move away from this scenario and to procure an externally sourced alternative.

Two recent global transformation programmes that Fox IT has been heavily involved in has seen both organisations use their project as an opportunity for consolidating their existing ITSM technology solutions, and at the same time moving to global instances rather than territorially hosted systems. This not only has the potential for significant cost savings but also helps to align the organisation from a process perspective, which obviously derives its own benefits (e.g. cost, ease of governance, etc.).

Some organisations purchase a solution that can be too extensive and too complex for their needs. Maybe management originally succumbed to the 'sales spiel' without considering the end-users who would be using it on a day-to-day basis. So simplification could be part of the overall strategy; the reverse could equally be true of course, where an existing toolset isn't capable of delivering everything that is required. A good example here is a need for better integration with automation opportunities in order to streamline (for example) the fulfilment of service requests.

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Whilst 'IT' is mentioned in 'ITSM toolset', many organisations also want to integrate with other areas of the business hence this could be an additional factor that needs to be taken into consideration. So another question that needs to be answered is: does the overall toolset strategy need to include areas such as Facilities, Human Resources, etc.?

All of these factors need to be considered when developing the necessary strategy, and from there a business case can be developed prior to proceeding onto the next step.

## Gathering Requirements

Once a strategy has been defined, the next step is to gather the requirements of what is needed from a toolset; i.e. what do you want to get out of it and which processes does it need to support?

A frequently witnessed mistake is where requirements are defined solely by management grades. Whilst senior input is necessary (as they will often have greater insight to the overall business objectives), it bypasses people who will be using the selected solution at its deepest level, so it is important that experienced users also provide input into defining the requirements.

For example, when looking at something like Incident Management, don't just capture requirements from the Service Desk Manager. Sit down with a Service Desk Analyst or Team Leader and get their perspective – you may get a slightly different view on some of the requirements!

Taking time to gather requirements at this stage will save time, effort and money in the long term, but it is a task that shouldn't be taken lightly or underestimated. Fox IT consultants have access to their FoxSELECT™ tool to assist clients in determining their requirements at a very granular level. FoxSELECT™ has been developed over many years of consultant experience working with clients to find the optimum solution for their business. The table below provides a breakdown of the different areas that an organisation should be cognisant of when thinking about the ITSM areas that need to be supported by a toolset.

The numbers indicate pre-defined requirements in FoxSELECT™ that should be considered – in total there are 1,191 individual requirements listed. Obviously not every area will be relevant, but at the same time it may open the eyes to considering other areas for technology support that previously hadn't been thought about.

Area of review	Req'ts	Area of review	Req'ts
General requirements	57	Change Management	75
Implementation Support	19	Release & Deployment Management	86
Business Relationship Management	23	Service Validation & Testing	37
Demand Management	68	Knowledge Management	78
Financial Management	56	Service Asset & Configuration Management	85
Availability Management	50	Incident Management	83
Capacity Management	44	Event Management	35
IT Service Continuity Management	62	Request Fulfilment	42
Service Level Management	45	Problem Management	78
Supplier Management	40	Continual Service Improvement	41
Service Catalogue Management	25	Service Reporting	33
		Project Management	29

When gathering individual requirements, it is important to highlight those that are 'must haves' or 'nice to haves'. This can help later on if compromises have to be discussed when making a final toolset decision. When Fox IT meet with a client to discuss their individual requirements, each one is gauged based on the following criteria:

- 1 – Low importance
- 2 – Moderate importance
- 3 – High importance

These marks help to drive a weighting mechanism to the evaluation and enables the consultant to easily identify those 'must haves' and 'nice to haves', and the scoring mechanism is also utilised to facilitate a weighting system that is used to determine how well one toolset versus another supports a set of requirements.

Also, as mentioned when determining a toolset strategy, if business functions need to be supported (such as Human Resources or Facilities), then additional requirements should be gathered for these specific areas as well.

The exercise also helps clarify thoughts on functional priorities for inclusion in any phased toolset implementation and what could be possibly 'parked' for future enhancement.

## Vendor Selection

There are obviously a multitude of ITSM toolset vendors in the marketplace, but it is usual to only engage with a subset of these when beginning the selection process. This subset should be determined by the strategy that was determined earlier – not just the vendor's marketing material!

- Did you decide on (for example) a SaaS or On-Premise solution?
- Do you want to engage with a mature vendor or are you open to the latest 'upstart'?
- Are you happy to engage with a company based overseas or would you prefer a locally-based vendor?
- Does PinkVERIFY™ come into the equation?
- Does a rating on Forrester's Wave™ or Gartner's Magic Quadrant need to be taken into consideration?

Other possible factors that may also come into play include:

- Political (e.g. strategic partnerships).
- Mergers and Acquisitions (e.g. ITSM technology solutions that are already in use).
- Recommendations (e.g. by C-Level managers with experience of a toolset elsewhere!).

All of the above can be used to produce a shortlist of vendors with whom to engage.

Once there is a shortlist in place, each vendor should be requested to provide details on how well (or not) their solution meets the organisation's stated requirements. Again, Fox IT's FoxSELECT™ tool takes this one step further and vendors are asked to rate individual requirements based on the following scale:

- 0 – No support at all
- 1 – Little support
- 2 – Moderate support
- 3 – Full Support

Taking these into account alongside the 'must haves' and 'nice to haves', provides the capability when analysing the results to determine an overall rating on how well a particular toolset supports the defined requirements.

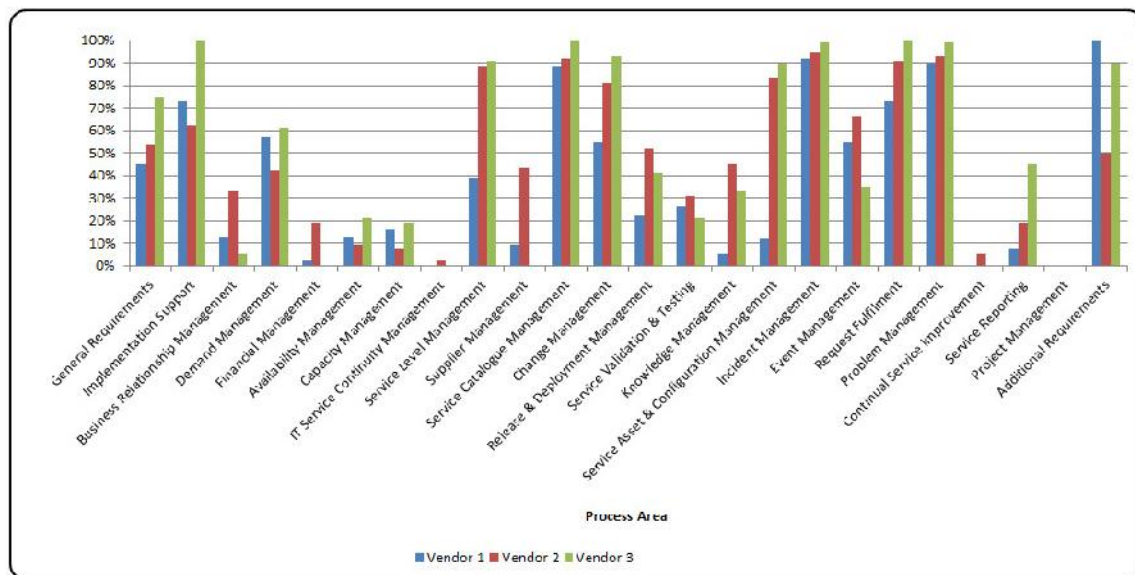


Image: example vendor comparison from FoxSELECT™

Some of the other items that a vendor should provide details on will include:

- Costs – including set-up, on-going, and licensing model
- The future development roadmap for the toolset
- Upgrade mechanisms (how easy or complex, speed to market of changes, etc.)

## Selecting the Most Appropriate Toolset

Only once all of the information from the vendors has been collated should a decision be made on which solution to select. Having all of the data available from the steps outlined so far, enables an informed decision to be made based on the following principle:

### Strategy vs. Functional Requirements vs. Cost

Taking all three into consideration will ensure that the most appropriate toolset is selected based on all of the available factors and the information that has been collated. It may be, for example, that a vendor meets all of the requirements but costs too much. So there may have to be some compromise on functionality in order to remain within any budgetary constraints – but at least you have the data with which to make that informed decision.

## Next Steps

Before heading off straight into an implementation activity, organisations should first take a step back and look at their processes and how they want the ITSM toolset to support those processes. **Remember, the technology should support the organisation's processes, not dictate them!**

The next article paper in this series will take a look at defining a new process (or reviewing and refining an existing one) and then capturing the specific functional requirements of the selected toolset to support the operation of that process. The paper will also look at when to compromise – either with the process or the functionality.

## Summary

Selecting an ITSM toolset is a big decision-making exercise, and needs to be given suitable thought and consideration to ensure that the chosen solution will serve the long-term interests of IT and the Business.

Make sure a strategy is defined before commencing activities to define requirements or identifying which potential vendors to engage with. Then produce a detailed set of functional requirements that incorporate the views of end-users as well as management. Only with these in place should you start narrowing down the field of which vendors to approach.

Don't rely on marketing material either! Ensure that each vendor clearly identifies which requirements their toolset supports and which ones it doesn't. Then perform a detailed analysis based on your strategy, your functional requirements, and the proposed costs. Only then will you be able to make the right decision for your organisation.

**Mark Sykes**, *Principal Consultant at Fox IT*

## **About Fox IT**

Fox IT® has been a leading Information Technology Service Management (ITSM) and governance business for over 30 years. We provide a range of practical and effective consultancy solutions designed to create agile, proactive, responsive IT organisations providing excellent IT services in alignment with our clients' goals to support and drive continuous business innovation. We achieve this by empowering your people with best practice training, developing and implementing the right operational processes and using properly configured and integrated tools to enable IT Services transformation.

To discuss how we can assist you in transforming your IT services, ITSM toolset selection or in obtaining ISO/IEC 20000 certification please call us now on +44 (0) 333 202 1018.

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