

# Best practices to deliver a service catalog employees love

Develop the right strategy and design principles  
to enable your digital enterprise



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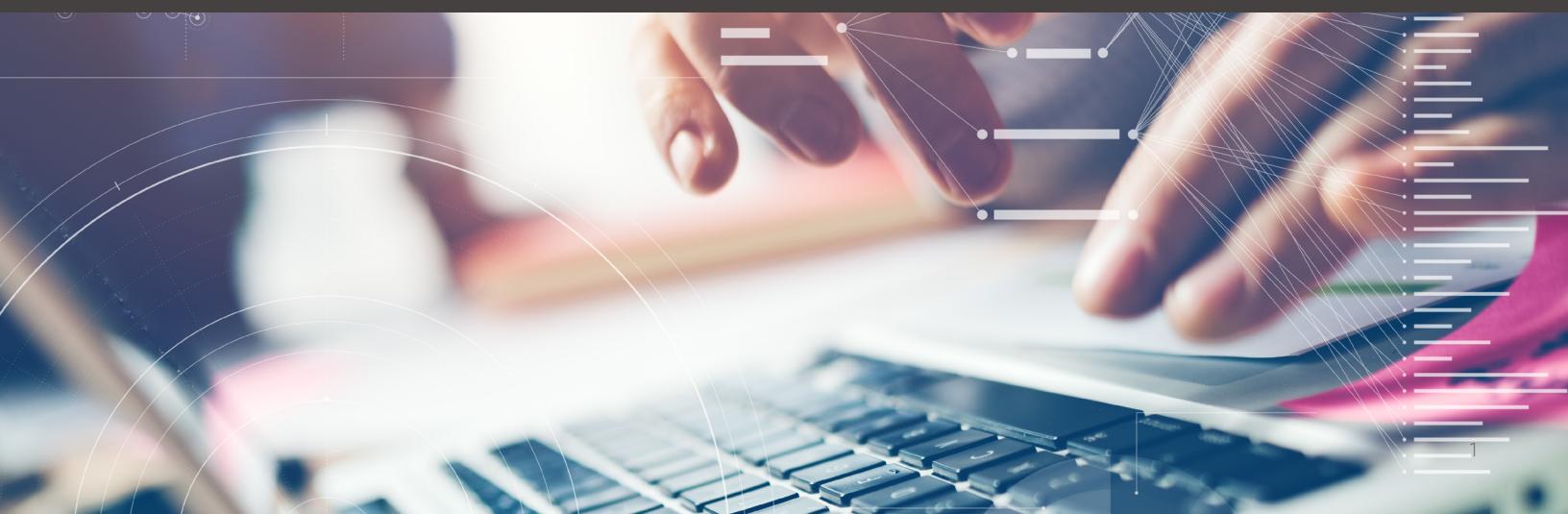
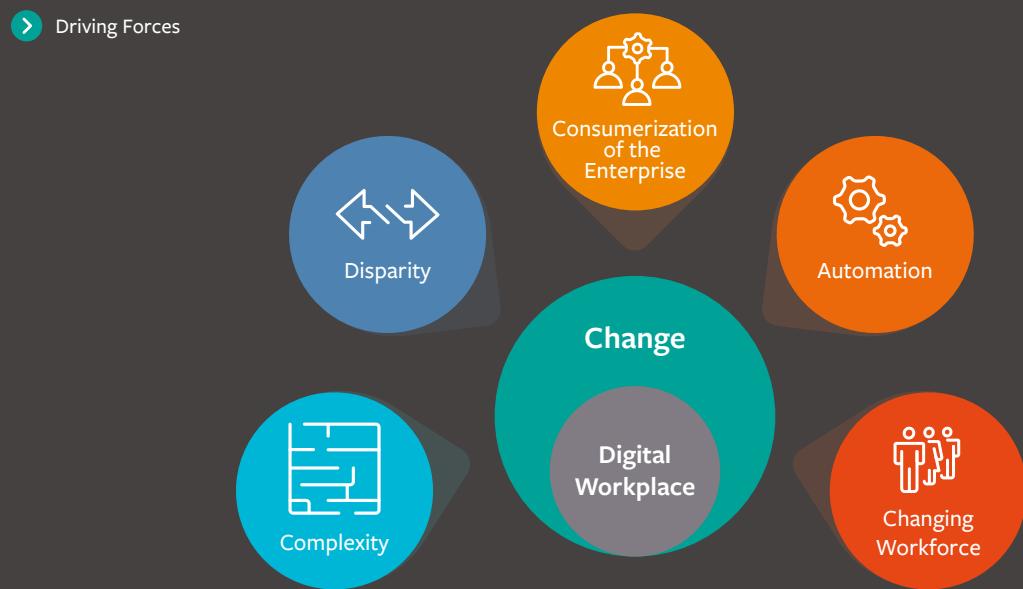
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## Executive Summary

In today's world of continuous innovation, rapid change, and competitive hiring markets, a digital workplace provides an essential foundation for success. By offering modern tools designed around the needs and preferences of users, you can attract the best candidates for your workforce—and empower them to get more done, more quickly and easily. One of the most important elements of this people-centric approach is the service catalog. For employees, a consumer-style experience offers the convenience and control they're accustomed to in their personal lives, providing direct access to resources without cumbersome interfaces and workflows.

For IT, a modern service catalog furthers the transition to a service broker model that delivers greater value to users and the business. By increasing the accessibility and adoption of company resources, your whole organization becomes more agile, more productive, and better able to meet the demands of your business.

In this white paper, we'll explore strategies and design principles to deliver a service catalog that employees love—to help your business realize the full competitive benefits of a digital workplace.



## ENABLING THE DIGITAL ENTERPRISE

Modern digital experiences have transformed every corner of the consumer marketplace. The evidence is clear: when you offer people a better way to get things done—faster, more convenient, more productive—billion-dollar businesses are built. The same dynamic applies in the workplace. As continuous innovation brings new opportunities for employees and businesses alike, people depend on IT to provide the kind of seamless digital experiences that help them do their best work. When your business depends on pushing website changes 25 times each day, or getting disruptive digital services into production faster than the competition, your ability to engage and empower your workforce assumes truly strategic importance.

The expectation of a digital workplace is already a major factor in talent recruitment and retention, and this will only increase as digital natives continue to reshape the workforce. In fact, 93 percent of millennials cite modern and up-to-date technology as one of the most important aspects of a workplace. With digital skills in high demand, companies that fall behind in employee experience risk losing out on the candidates best able to drive their success.

Here's a quick self-test to assess the maturity of your digital workplace. Are you:

- Deploying systems that seamlessly connect and unify systems through a flexible, consumer-like user interface?
- Shifting to a “people-centric” focus on user empowerment, while keeping necessary process enforcement and governance?
- Automating time-consuming tasks?
- Managing resources to help both people and systems performing at peak efficiency?

There's one area of IT where all four of these themes come together: the service catalog. This is one of the most important elements of people-centric IT. Why? By transforming your service catalog, you can improve user satisfaction, streamline service management, and increase opportunities for self-service automation—which benefits users and service desk staff alike.

On a strategic level, your service catalog is a key part of IT's transition to a service provider to the business, a shift that calls for replacing the traditional top-down ITSM model with a people-centric view. This includes consolidating service catalogs to simplify usability as well as presenting internally delivered services and offerings alongside third-party options within the same consumer-style experience. By making it simpler for employees to leverage the full range of available technologies, you can increase IT's impact as a powerful driver of business output, innovation, and growth.

Consider two key use cases enabled by [BMC Helix Digital Workplace](#):

### Employee experience

From welcoming new employees, to rolling out new perks, to enacting retirement benefits, HR can provide services more efficiently, in a way that's easier for people to understand and use. New hires can start with a digital onboarding process that they complete on their mobile phone, and can choose a new-employee bundle of products and services to become productive right from the start.

### Enterprise service store

With a few taps, employees can order a new computer or mobile device either a la carte or through a simplified bundle. On the back end, licenses and entitlements are managed with drag-and-drop ease. New catalog items can easily be created by non-technical users with professional-looking results.

In each of these cases, a modern service catalog provides an experience that equals or exceeds any consumer service while helping internal departments provide services more efficiently. The faster and simpler the experience becomes, the more people can focus on driving value for the business. A well-designed service catalog:



Helps employees solve problems for themselves using intuitive self-service tools



Improves agent productivity by automating and centralizing common activities, reducing the manual effort needed to process user requests



Provides engaging omnichannel experiences across devices to support employees whenever, wherever, and however they want to work

As a starting point for your service catalog transformation, think about the types of business, technical, and core services you'll want to include. It's essential to have a clear understanding of your scope at the outset to keep the project from sprawling; there will always be late additions, but being too open-ended can make for a protracted rollout. How will you prioritize the needs of your business from a servicing perspective? What resources do you need to deliver the service catalog, and what fulfillment systems are available in your environment?

In the next section, we'll look at the role of design principles in service catalog creation.

## DESIGN PRINCIPLES FOR YOUR SERVICE CATALOG

When your overall goal is simplification, you can't afford to improvise. "I'll know it when I see it" isn't a plan. Instead, take a consultative approach with a keen focus on what you're trying to accomplish. This is where design principles come in, establishing a high-level framework for how you want to deliver your catalog. This can take different forms for different organizations depending on their needs and priorities.

For example, one company's design principles might include:

- Creating a framework that scales across shared services
- Focusing on services with the highest volume or greatest frequency
- Providing clarity and consistency across platforms
- Avoiding duplication of effort and investment in multiple tools
- Eliminating back-and-forth between the requestor, approver, and fulfiller

Another company's design principles might center on the user experience:

- Reducing clicks for form submission
- Providing a better experience on small devices
- Using a quick-search capability to eliminate long drop-down menus
- Improving approvals transparency for requestors and approvers
- Highlighting additional value-adds such as ratings and a persistent shopping cart
- Improving back-end processes such as workflow maintenance and smart reporting

However you define the scope of your service catalog transformation, the following principles can help you deliver optimal value for employees, IT, and the business.

### Create a consumer benchmark

What online storefront experiences do you find the easiest, most intuitive, and most satisfying to use? Think about the elements of that design: how is information displayed? What is most visually impactful? How can that approach translate into the services your organization offers? On Amazon, for example, offers they want to highlight run across the top of the landing page. What do you want to present first? How can you make your landing page impactful and relevant to the largest volume of requests, or the most strategically important services you offer?

Think of it this way: companies like Amazon and Apple have become giants through years of research and investment in the most effective way to offer products and services online. Why not leverage that expertise for your own organization rather than starting from scratch?

### Decide what goes into your catalog

Deciding what your catalog includes should be a thoughtful process. The goal isn't simply to dump everything online and point people to it; the quality and effectiveness of the experience will hinge on the way resources and services are presented.

- Think about the kind of **bundles** you can create to streamline common processes—for example, employee onboarding, employee departures, or home office enablement. Bundles can be especially valuable for processes that involve multiple entities across the organization. By removing guesswork and making it simple for people to access everything they need with a single click, you can provide the kind of seamless experience employees value.
- How are service offerings linked to **business services**? Can you group and present them accordingly?

- **Recommendations and context awareness** based on the individual's department and location help people discover the services most relevant to their jobs.
- **Encourage search.** It's a common mistake to try to simplify the interface by consolidating items into drop-down fields, but this makes them unsearchable—and many people hate drop-down menus. Instead of nesting “mouse” inside your “computer” item, make it an item in its own right so it's easier to find. You can always use bundles to group related items like these together.
- A **shopping cart** is an essential part of a consumer-like experience. It should be persistent across sessions so people can add items when they think of it, then complete the request later at their convenience.

### Create a strong visual impact

Your service catalog should never be boring. Colors and icons can help you convey useful information about the types of items you offer—for example, presenting incident-related items in red, equipment in blue, and software in green; or using families of icons to show how items fall into various functional categories. Keep in mind that users typically read only the first three words of a listing, so make them count—then use a picture to tell a thousand more words. At the same time, make sure the profile provides all the information the user needs to understand the service, including associated costs.

### Don't overlook data

Effective use of foundation data is key. Don't ask users to fill out information you already have—use actions and triggers to pre-populate forms as much as possible.

### Make it mobile

People need to be able to access all the services they need, from anywhere. This goes beyond just delivering apps on mobile devices; complete services must also be available on laptops and other types of connected devices so people can work anywhere without compromise.

### Be device-friendly

Make sure the experience transfers well across devices. How practical is the form for people with big fingers and small screens? Are your images and icons effective at any size? One way to ensure a good mobile experience is by limiting the need to scroll down. Split the form into logical sections, then expand and compress sections as people work through them. Of course, people tend to dislike scrolling on any type of device; carousel mode is a more popular and effective approach.

### Make approvals transparent

Both requestors and approvers should have clear visibility into the full approval string so people know the status of each request and who it's going to next.

### Plan for continual improvement

In a consumer marketplace, customers vote with their feet (or clicks) by giving their business to the merchant who best meets their needs. As the only option within your organization, you'll have to be more proactive in finding out how well you're doing. Simple surveys can be highly effective—even just a series of emoji people can click to indicate their level of satisfaction, from smile to scowl. Periodic focus groups can be useful for gathering more nuanced and granular feedback.

### Measure your success

Along with user feedback, a few metrics can help you assess the performance of your service catalog. How many self-service requests are you seeing now compared with before? Are service requests increasing relative to incidents? What's your adoption rate on various platforms? This kind of data can help you get beyond subjectivity to measure how you're really doing.

### Developing your service catalog

With your design principles defined, you're ready to develop the service catalog. At a high level, you'll need to:

- **Identify, define, and build** the services your business needs. To begin, perform an analysis of the services that your IT organization delivers today, working through all of your legacy service delivery methods to identify the most frequently requested. This is a good time to review, document, and potentially improve the processes required to fulfill each service.
- **Create navigation.** Keeping your design principles in mind, start categorizing services and applying keywords to help users to locate the services they need in the shortest amount of time.

- **Define entitlements.** To provide services in a secure and controlled manner, define which roles and groups can access each service.
- **Define resources.** Who are the individuals or groups that will ultimately fulfill the service requests? How long will it take, and what are the associated costs?
- **Add connectors and integrations.** To fulfill IT's role as a service broker, your service catalog should offer not only internal services and applications, but also external resources, including those in public, private, and hybrid clouds, to be effective. Allowing vendors to onboard themselves, as merchants do on Amazon, opens the door for greater participation.

## MAINTENANCE

### Reporting on key metrics

To increase the value of your service catalog for the organization, use it to capture complete information on service adoption, cost, delivery against SLAs, and other metrics so you can evaluate the ROI of each service being delivered. In this way, you can make decisions based on real data on the tools people find most useful, the ones that deliver the greatest impact, and the cost of each service.

### Adding and updating services

The metrics you gather can provide a valuable starting point for enhancing the offerings in your service catalog. Unlike in shadow IT, where users source their own tools based on subjective factors like word-of-mouth or vendor marketing, your service catalog allows you to capture rich data on actual usage and utility to help you decide which services merit further investment and which should be retired, as well as identifying broader trends in the types of tools and functionality people most value. This insight helps build IT's expertise and credibility as a trusted advisor for business owners.

As you add new services, keep in mind:

- **Templates** can make the addition of services to your catalog simpler and more efficient. The out-of-the-box templates that come with many solutions can be helpful, but don't take "out-of-the-box" too literally; they often need to be customized to best meet the organization's needs. Whether pre-built or created from scratch, the templates you use should reflect an understanding of how users consume each service. Make sure the template is designed to capture complete details about the service, including associated costs.
- **Catagories** make it much simpler for users to navigate a catalog and find what they need. Make sure the categories you create are meaningful and relevant, and keep them accurate by ensuring that new additions are categorized accurately.
- **Don't duplicate efforts.** Import existing services and requests when possible, and use available connectors to retrieve fulfillment system content. This can reduce both work and the potential for error.

### Anticipating future needs

A modern service catalog is an open, dynamic process—not an end state. Stay engaged with business owners to keep the catalog relevant by updating it with new items, rotating timely promotions into banners, expiring outdated items, and continually adapting it to the needs of the business. If a new business initiative, expansion, or market trend will have a significant impact on the way the catalog will be used, you should be able to plan ahead and make sure you're ready to meet those needs. If the preferences and work styles of employees evolve over time, partners in lines of business can help you understand and address those shifts as well. Remember, this is a user-centric process, not an IT-centric one.

## CONCLUSION

As a digital workplace becomes essential for both business performance and workforce development, it's time for the traditional IT service catalog to evolve. By providing a modern, consumer-style experience for accessing resources across internal service departments, you can help your organization compete for the most in-demand talent and help each employee drive greater value for your business. We hope you've found the principles and best practices in this white paper helpful for refining your digital workplace strategy.



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