

Master the service catalog and request management process

Get on track with a stellar service catalog and request management process

Introduction

This process guide is a detailed explanation of how you can use the the service catalog and request management process within the Now Platform®.

Service catalog and request management process scope

Service catalog management involves:

- Creating the catalog and taxonomy
- Maintaining the service catalog
- Creating individually offered services and the fulfillment mechanism for each of them
- Modifying and retiring existing offerings

Request management involves:

- Approving overall requests, for example, by a line manager or financial controller
- Approving individual requested items, for example, by an IT hardware provisioning team
- Fulfilling all requests within the agreed delivery time frame

Service catalog and request management process objectives

When it comes to your organization's service catalog and request management process, be sure you:

- Make all users in your organization aware of the catalog and of how easy it is for them to request services and product offerings
- Provide users with a consistent and repeatable process for requesting and fulfilling services to ensure that their expectations are clearly set and continually met so you can maintain high customer satisfaction levels
- Offer all new services in the catalog quickly—as soon as they become available

This process guide will help you create and maintain an effective service catalog and request management process by:

- Defining the best process for service catalog management from creation to service modification
- Defining the best process for request management from approval through fulfillment
- Explaining how to integrate other processes with service catalog and request management

Regardless of your level of maturity with ServiceNow®, follow this guide as closely as possible. At ServiceNow, we encourage using the same simple, lean ITSM processes that are reflected in our out-of-the-box designs.

In this guide, you'll find additional recommendations from ServiceNow Professional Services beyond the specific out-of-the-box (OOTB) functionality. You may add additional functionality to what's offered, but you should only do so in scenarios when you will achieve a required business outcome that can't be achieved using an OOTB method. When you follow this approach, your upgrade paths will be smoother, and you'll be better able to expand your use of the Now Platform.

BEFORE YOU START, YOU NEED:

- To define a clear set of measures of success for the service catalog
- To understand that service catalog design is not a project but an ongoing process

Terms and definitions

Service catalog – A service catalog is a listing all IT services offered to the business. It allows users to browse or search the offerings and request them in the same manner as an online shopping experience. A service catalog includes a shopping cart where users can create a list of all the items they want to request before they submit the request by checking out.

Request management – Request management is the process that immediately follows the submission of a request from the service catalog. It includes the approval of the overall request and/or the individual requested items and the subsequent fulfillment of them.

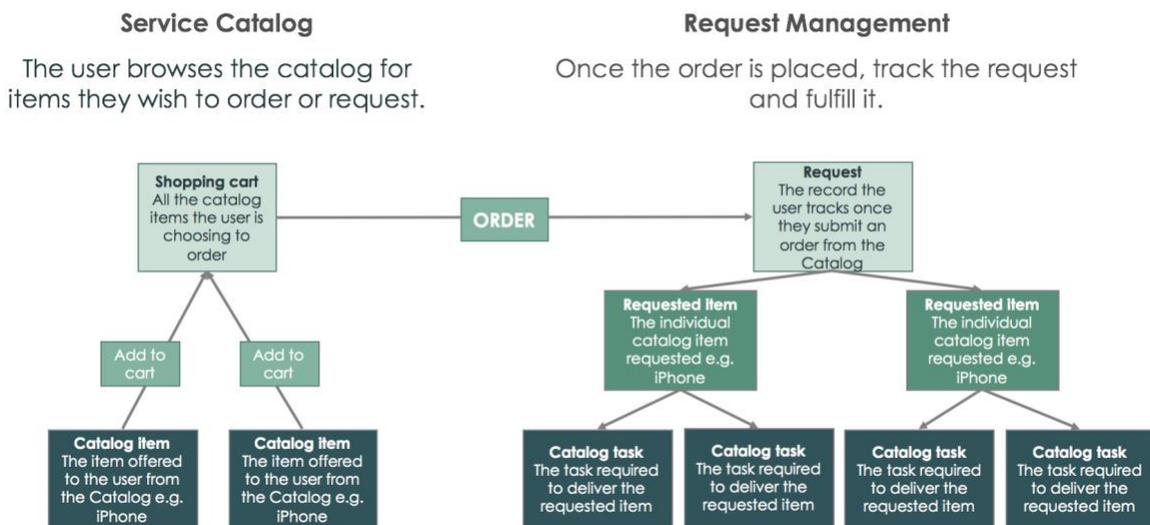


Figure 1: The service catalog and request management process

Roles and responsibilities

Process owner

The process owner owns and maintains the service catalog and request management process. This person is typically a senior manager with the ability and authority to ensure the team implements the process and that all stakeholders follow it.

Responsibilities

- Define the overall mission of the process.
- Establish and communicate the process's mission, goals, and objectives to all stakeholders.
- Document and maintain the process and procedures.
- Resolve any cross-functional (departmental) issues.
- Ensure proper staffing and training for execution.
- Direct the service catalog and request management roles.
- Ensure consistent execution of the process across the organization.
- Monitor, measure, and report on the effectiveness of the process to senior management.
- Continually improve the process.

ServiceNow role – There is no required role in ServiceNow—this is a functional role that supports the process.

Catalog manager

The catalog manager's purpose is to ensure changes to the service catalog are controlled and to provide a method for efficiently resolving service catalog issues.

Responsibilities

- Manage the day-to-day activities of the process, and document the operating procedures that support the activities.
- Assign tasks to catalog editors for execution.
- Coordinate interfaces between service catalog management and other processes.
- Record all operational services (and those being prepared) within the Service Catalog.
- Maintain appropriate views of the service catalog and make them available to those they're targeted for.

ServiceNow Role – The **catalog_manager** role is required.

Catalog editor

The catalog editor adds, modifies, and retires catalog items based on the the service owner's and catalog manager's approvals.

Responsibilities

- Create new catalog items and their associated workflows.

- Modify existing catalog items.
- Retire obsolete catalog items.

ServiceNow role – Both the **catalog_admin** and **catalog_editor** roles are required.

Service owner

Each service must have a designated owner. The service owner is accountable for the delivery of a specific IT service and is responsible to the customer for initiating, transitioning, and providing ongoing maintenance and support of that service.

Responsibilities

- Create the service delivery method, including engaging and coordinating fulfillment teams.
- Ensure the service is delivered within the expected time frame and its cost is allocated to it.
- Approve requests against the service.

ServiceNow role – The **ifil** role is required.

Requester

Requesters may be anyone in the organization with access to make requests, and they may submit service requests on someone else's behalf.

ServiceNow role – No role is required in ServiceNow for this, but requesters need a login.

Approver

Approvers are the line managers, service owners, and business stakeholders (such as financial managers) responsible for reviewing request details and granting approval or rejecting the requests. The actual number and type of approvals required depends on the individual request.

ServiceNow role – The **approver_user** role is required.

Fulfiller

Fulfillers are the people who are assigned to execute one or more specific tasks to fulfill the service request.

Responsibilities

- Work on the activities with their assigned tasks.
- Update the tasks to reflect the current progress and provide detailed information to allow a service desk agent to give the requester a progress update if required.
- Close tasks when they're complete, along with closure information.

ServiceNow role – The **ifil** role is required.

How requests are initiated

Directly in ServiceNow – A service desk agent can create a request, on a user's behalf, directly as a result of a phone call, email, or chat from that user.

Self-service – End users can use the self-service portal to create a request directly.

Automatically via integrations – Certain requests can be automatically generated within the virtual agent chatbot from Slack or Microsoft Teams.

Virtual Agent – A request can be created directly from a chat conversation.

Walk-Up Experience – By visiting the onsite IT support location, users can create a request using the Walk-Up Experience interface.

Service catalog management process

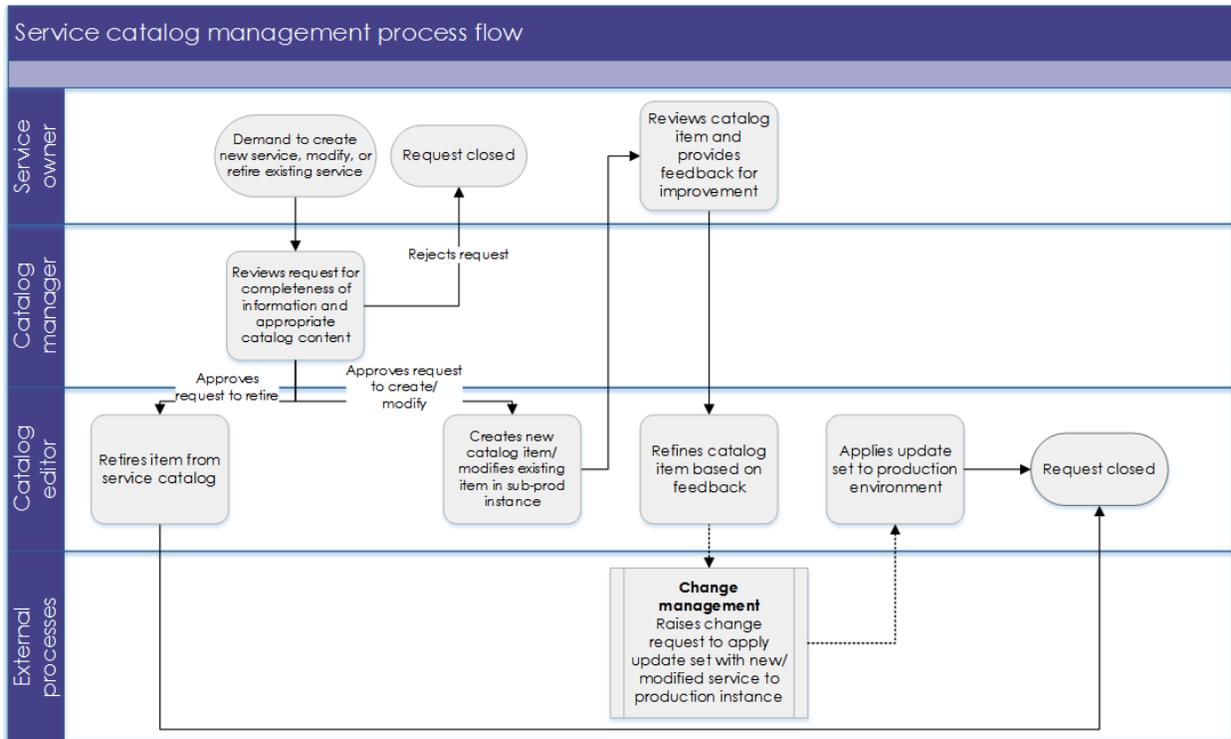


Figure 2: The service catalog management process flow

Request and approve new services

When a new service is due to go live, you must first add it to the Service Catalog. The best practice is to create a catalog item in the Service Catalog for the express purpose of allowing service owners to request a new item be added to the catalog—it's a catalog item to request a catalog item. Users will need to provide details on:

- What service is being offered
- Who is allowed to request it
- What information must be collected from the requester in order to fulfil the request
- The delivery time scales
- Who should approve the request
- What tasks are required to fulfil the request
- Whether the tasks must occur in a particular sequence
- Which team should complete the tasks

Once you've submitted the request, route it to the catalog manager for review and approval. When you're requesting a very complex service, you may not be able to document every part of the requirement within the request itself, so the catalog manager may need to discuss the service in greater detail with the service owner.

Once the catalog manager is comfortable that the service is well understood and is appropriate to include in the catalog, they can approve the request. At this point, assign a task to a catalog editor to fulfill the request.

Create and publish new services

Now the catalog editor can create the catalog item. In most cases, the editor should create it in a sub-production instance to ensure it can be fully tested before being made available in the live catalog.

Catalog editors should follow this process when creating the catalog item:

1. Create the required variables, approvals, and catalog tasks.
2. Include the item in the most appropriate category and sub-category within the catalog.
3. Ask the service owner to fully test the service to ensure it behaves exactly as required and that it can be made available in the live catalog. The editor should make any adjustments at this point based on feedback from the service owner.
4. Once both are happy with the new service, the catalog editor can publish the new service in the production service catalog.

Modify and retire services

Service owners should also raise a request when they need to make a modification to an existing service or to retire one. Requesting to modify a service is very similar to requesting a new service. The catalog editor follows this process:

1. Instead of creating a new item, make modifications to the existing item in a sub-production instance *unless* the risk is very small—then it's possible to do it in production.

Heads up!

Only do this if it's a small change that won't impact the workflow, like changing the category the item is in.

2. Ask the service owner to test the item.
3. Publish the item to the production instance.

To retire an item, the catalog editor completes the action immediately in the production instance.

Request management process

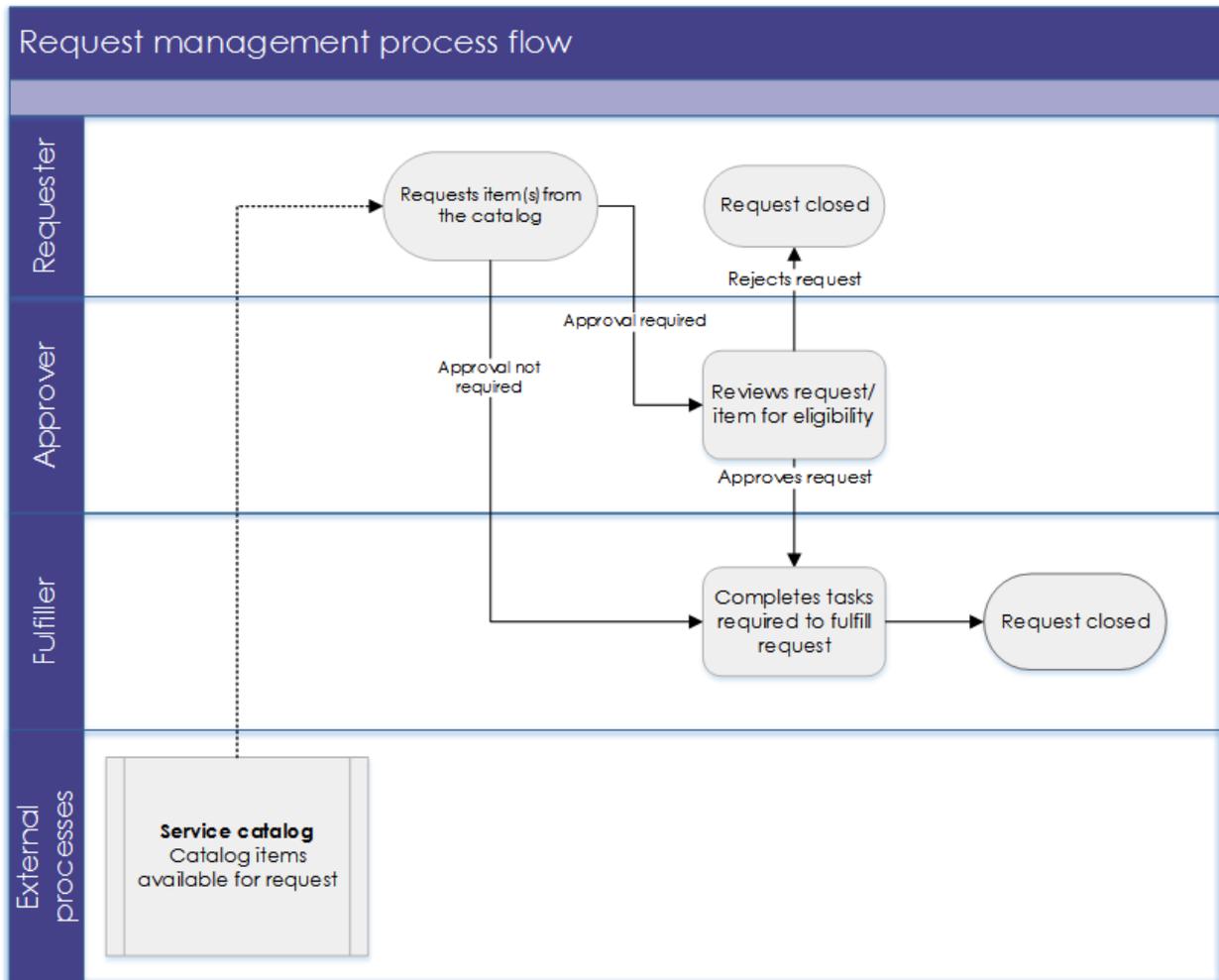


Figure 3: The request management process flow

Request services

When you need something from your ServiceNow Service Catalog, like a particular hardware item, search or browse for it in the catalog. When you find it:

1. Complete the required questions about the service within the service request.
2. If you're only requesting one item, click the **Order Now** button to check out immediately.
3. If you're requesting more than one service, click the **Add to Cart** button to hold your first service in the cart while you add additional services.
 - a) When you've added all the services you need to the cart, click the **Proceed to Checkout** button.
 - b) During checkout, you can enter additional overall information, including a shipping address or special instructions. You can also edit the cart if you need to remove something.

- c) Click the **Checkout** button when you're ready. Your request is created.

Request approvals

Next, you'll seek any required approvals. Typically those held at the request record level are generated first since a line manager approves the requests at that level.

Your request may require more than one approver. For example, the hardware item you requested may require IT approval for its procurement and facilities approval for its placement. Once each required approver receives your request and approves, your request can be fulfilled.

If any of the approvers reject the request—or an item within it—it's marked as **Closed Rejected**, and the requester receives an email notification that the request was rejected.

Request fulfillment

When a request is approved, the catalog tasks are created automatically. There may be several of these per requested item that may occur sequentially or in parallel. Catalog tasks are assigned to specific groups who will fulfill the requested item. For example, a specific group within your IT department will receive a catalog task to deploy software or deliver hardware to the requester.

The person in the group who receives the catalog task should:

1. Change the **State** field in the request to **In Progress** to make it clear that work has begun on the task.
2. When the work is complete, set the **State** to **Closed Complete** unless the task could not be completed.
3. If the work cannot be completed, select either **Closed Skipped** or **Closed Incomplete**.

Once all catalog tasks for the requested item are closed, the item (like delivering the hardware) will be closed automatically. Once all items are closed (such as deploying the software and delivering the hardware), the actual request can be closed. The requester receives notification, and the process is complete.

Track requests

As you can see from the approval and fulfillment parts of the process, the request management lifecycle may involve multiple groups and individuals. In order to provide a single point of contact for the requester, the service desk is considered the owner of all requests—regardless of who is actually responsible for fulfilling them.

Although there is an overall request record to track all of their requested items, most requesters prefer to track progress against the record for each item since, in many cases, they can be fulfilled independently of each other.

Other processes

Incident management

It's extremely common for ServiceNow customers to offer end users the opportunity to raise incidents themselves using a self-service portal—usually along with the Incident Management application. If your organization does, use the record producer to allow users to see an interface that looks the same as a catalog item and that can be stored within the catalog as any other offered service. The difference is that, once the incident is submitted, the record producer will not raise a request with items and tasks as it does with other catalog items. Instead, it will immediately generate a new incident record that will follow your normal incident process.

Many service requests may come from the service desk and may be initially handled through the incident management process before they're identified as service requests.

Change management

Standard changes are stored as templates within the Service Catalog through the Standard Change Catalog plugin. Use these templates to create new standard changes with prepopulated content.

Heads up!

Instruct users to create new changes from the standard change catalog—never directly from the Service Catalog. This is because there's a large amount of technical information required to create a standard change. By using the standard change catalog, users raise a request to the team responsible for implementing the change—and that team subsequently raises a change record for the work.

Configuration and asset management

With the Configuration Management and Asset Management applications, you can use information about asset and configuration item (CI) attributes in various catalog items that initiate service requests. You can trigger updates to certain asset and CI attributes—such as those for software license counts—from a service request.

Service level management

When you use ServiceNow Service Level Management, it defines the fulfillment targets for your various types of service requests.

Process governance

Measurement

Key performance indicators (KPIs) evaluate the success of a particular activity toward meeting its critical success factors. You can successfully manage KPIs either by repeatedly meeting an objective (maintaining the KPI) or by making progress toward an objective (increasing or decreasing the KPI).

The Benchmarks feature in ServiceNow gives you instant visibility into your KPIs and trends, as well as comparative insight relative to your peers' industry averages. You can contrast the performance of your organization with recognized industry standards, and view a side-by-side

comparison of your performance with global benchmarks. Benchmarks offers the following ITSM KPIs:

- % of closed requests with breached SLAs
- Average time to fulfil a request
- Number of requests created per user

Metrics

Process KPIs

Process KPIs provide information on the effectiveness of the process and the impact of continuous improvement efforts, and they are:

- Best represented as trend lines and tracked over time
- Monitored by the process owner

Item	Purpose
Number of new catalog items delivered into the live environment per month	This is an indicator of your service catalog's accuracy and new services' growth.
Number and percentage of service requests completed within agreed target times	This data measures how effectively your service request SLAs are achieved.

Table 1: Some process KPIs and their purpose

Operational data

Track active catalog items and requests that require visibility, oversight, and possible management intervention on a dashboard or homepage that is monitored by the service desk and request fulfilment team.

Item	Purpose
List of generic requests that have been submitted	A periodic review and analysis of your generic requests may reveal opportunities to improve your service catalog's organization or to identify new services and/or catalog items you should add.
Ageing of open service catalog item review tasks	You'll see a list view of the request items with values against each item. One of those is the due date, which allows you to determine ageing requests by open requested items on a due date.
List of open requests that have exceeded target times	You'll see a list of open requests that have breached SLAs and need immediate attention.
Pie chart of service request backlog by type	This data is presented as a quick view of those fulfilment areas that need improvement (with the ability to drill down).

List of open requests that have exceeded target times	You'll see a list of all open requests that have breached SLAs and need immediate attention.
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Table 2: Some operational KPIs and their purpose

Reports and dashboards

There are numerous default reports available in ServiceNow that you can use to generate charts, publish to a URL, or schedule to run and distribute at regular intervals. You can also create custom reports.

To help your users understand how to prioritize work, give them access to dashboards that provide live information about the records they are assigned to or are responsible for.

The takeaway

Keep these things in mind as you move forward with service catalog and request management:

- The catalog is there to provide a consumer-like experience to its users, so it should be easy to navigate.
- When you provide visibility of the request fulfillment process through self-service, it saves time for both the user and the company.
- Changing your users' behavior to use a service catalog is important when you introduce one for the first time, and it's key to driving adoption.
- Manage the items in the catalog close to the business so that they stay relevant, but provide overall governance of the catalog to keep consistency.
- Avoid repeated items and general sprawl.