



# **Building a Legendary Service Desk:**

**A Quick Guide to  
Modern ITSM**

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## Introduction

# The Great Service Desk Opportunity



For a few decades, IT was mostly back office nerdery. We fixed computers and ate donuts. Help desk workers reset passwords. We certainly weren't seen as strategic.

And then we arrived. Today, IT has become the backbone of nearly every business in the world, from Silicon Valley startups to global mining and manufacturing titans. The services you provide are no longer “nice to haves” — they're business critical.

Which creates a huge opportunity: In an era defined by amazing experiences and rising expectations, how can service desk evolve? How can you combine strong ITSM frameworks like ITIL with modern tools that improve efficiency, collaboration, and customer satisfaction?

That's exactly what you'll learn in this guide. We'll cover the three most common processes that every service desk should adopt, discuss why ITSM is a critical component of meeting rising customer expectations, and even introduce you to how Atlassian technology can help.

The result? You'll be well on your way to delivering legendary IT service to your customers. So let's get started!

## Chapter 1

# Doing ITSM The Atlassian Way

### A refresher course: What is ITSM anyway?

It's always nice to start with a painfully wordy, formal, and vague definition, like this one for IT Service Management (ITSM) from Wikipedia:

A discipline for managing information technology systems, philosophically centered on the customer's perspective of IT's contribution to the business. ITSM stands in deliberate contrast to technology-centered approaches to IT management and business interaction.

What does it all mean? [ITSM is really just about improving business performance by taking a more strategic approach to IT service delivery.](#) It's a long acronym for a simple concept: making sure you have the right people, processes, and technology to provide great service to your employees and help your business hit its goals in the process.

To help you do that, the UK government created yet another acronym — ITIL — in the late 1980s to provide a more formal set of guidelines for effectively implementing ITSM. Short for Information Technology Infrastructure Library, ITIL has evolved into a series of recommendations to help your IT team improve support processes and align IT services with business needs.

## A bit more about ITIL

Although the most recent version of ITIL covers 26 different processes split across five disciplines, very few organizations use all of these processes. Instead, most choose to adopt (and even adapt) those that best meet their unique needs.

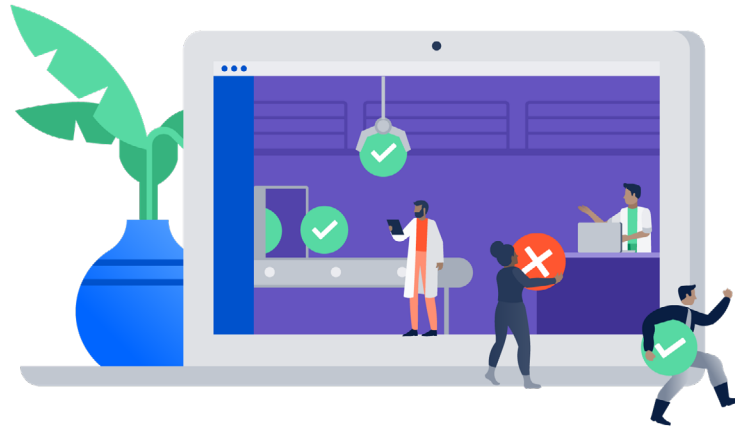
A few of the most commonly adopted ITIL processes, and the ones we will focus the most on in this guide, are:

- **Incident management** - Returning service to normal as quickly as possible after an incident, with little to no negative impact on the business.
- **Problem management** - Preventing problems and resulting incidents from happening, eliminating recurring incidents, and minimizing the impact of incidents that cannot be prevented.
- **Service request management** - Ensuring that customers have easy access to the IT services (and information, equipment, advice, etc.) they need to get their jobs done.
- **Knowledge management** - Gathering, analyzing, storing, and sharing knowledge and information to improve efficiency.
- **Change management** - Ensuring that standardized methods and procedures are used for efficient and prompt handling of all changes (to code, infrastructure, configurations, services, etc.) in order to minimize the impact of change-related incidents on service quality.

You can read entire volumes of books about each one of these ITIL processes, if that's your thing. The key thing to know is that you don't have to. At [Atlassian](#), we've created simple, [fully integrated tools for quickly and effectively adopting a modern approach to ITSM based on ITIL best practices](#).

Since we know you don't have the time to binge-read a few hundred pages, we're keeping this guide focused primarily on incident, service request, and knowledge management to start. We'll also cover Atlassian technology a bit. For now, just remember that you don't have to create and implement complex processes from scratch to set up an agile, ITIL-compliant service desk.

## Wait, you said service desk. How is that different from a help desk?



Glad you asked. Throughout the 2000s, the terms were often used interchangeably. In reality, they're quite different. Historically:

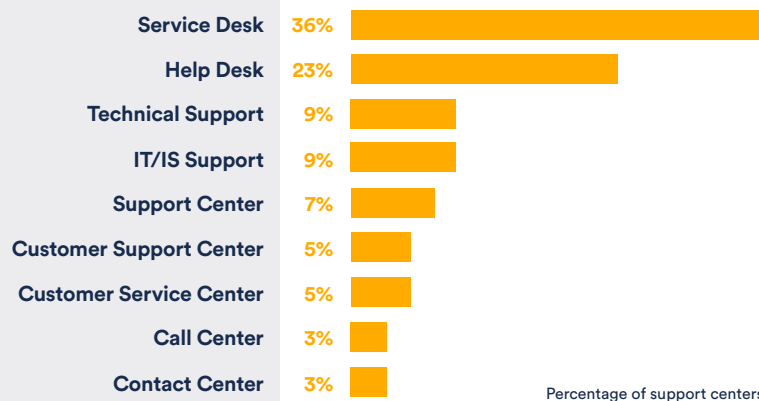
- The IT help desk was an IT support capability born in the late 1980s to fix purely IT issues. There was zero focus on the end user, and immediate fixes were infrequent.
- The service desk is an evolution of the help desk, born out of the ITIL framework, with a focus on the concept of “managing IT as a service.” It’s not just about fixing internal IT problems — it’s about improving IT and business processes across the entire organization.

In fact, help desks are often just a single component of a larger service desk operation, focused exclusively on break-fix (or what ITIL calls incident management). The larger service desk operation encompasses not only break-fix, but also requests for new services and requests for information (such as “how do I do X?”). As such, ITIL experts will state that a help desk is tactical, while a service desk is strategic.

In the end, what you name it is the least important part of running a top-notch ITSM practice. Forty-one percent of help desks and service desks are named something else entirely, according to HDI.

## The support center is referred to as...

Respondents were asked to select the closest match to their support centre's title.



What's more important you ask? Delivering great service that reinforces the value of IT. And to do that, it's helpful to start with best practices — adopting and adapting core ITIL processes to meet the needs of your company, and embracing technology that makes it far easier.

Let's take a closer look at these core ITIL processes, and some top recommendations for implementing them at your own service desk.

# Incident Management

In ITIL-speak, incidents are just unplanned events of any kind that disrupt or reduce the quality of service (or threaten to do so). An incident is a business application going down. A crawling-but-not-yet-dead web server can be an incident, too. For some offices, a refrigerator without beer is an incident.

A problem, on the other hand, is just the not-yet-known root cause behind one or more underlying incidents. For example, if a printer is down and the network is creeping, a misconfigured router could be the underlying problem behind both.

Since the goal of incident management is to restore a service as quickly as possible, the service desk is not expected to perform root cause analysis to identify why an incident has occurred. Root cause analysis is the focus of a different ITIL process called Problem Management. However, it's important that the service desk team capture all relevant information while working on the issue, which will help both with eventual problem investigations and with responding to future similar incidents.

When the service team responds to incidents, they should follow a predefined process to streamline the response and reduce the risk of prolonged service outages. The following process represents an example incident response based on ITIL recommendations. Your team can adapt the example to your existing ITIL processes, or use it to define new ones.

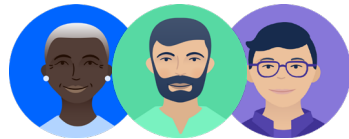


## Incident Response



Your process should include how you will identify, log, categorize, and prioritize incidents, as well as how you will handle the process of diagnosing them, escalating them (as needed), and closing them.

## 4 tips for even better incident management



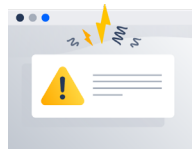
### 1. Divide and conquer to resolve incidents even faster

Having several people exploring different paths to resolution can be faster, and help you see the full picture.



### 2. Keep track of what counts

Don't use free-form data entry fields to capture the details of every ticket. Instead, use intuitive, meaningful categories to classify incidents so you can easily analyze and look for patterns.



### 3. Alert your customers, not the other way around

Proactively communicating IT incidents shows you care and are in control. Consider establishing a dedicated channel for broadcasting known issues.



### 4. Remember: Incident management is not the end game

The true goal is learning from past incidents, preventing problems altogether, and dedicating people and resources to fixing technical debt patterns.

# Service Request Management

The latest version of ITIL (v3) has renamed this process to Service Request Fulfillment, but it's still commonly called Service Request Management (or SRM) by IT practitioners.

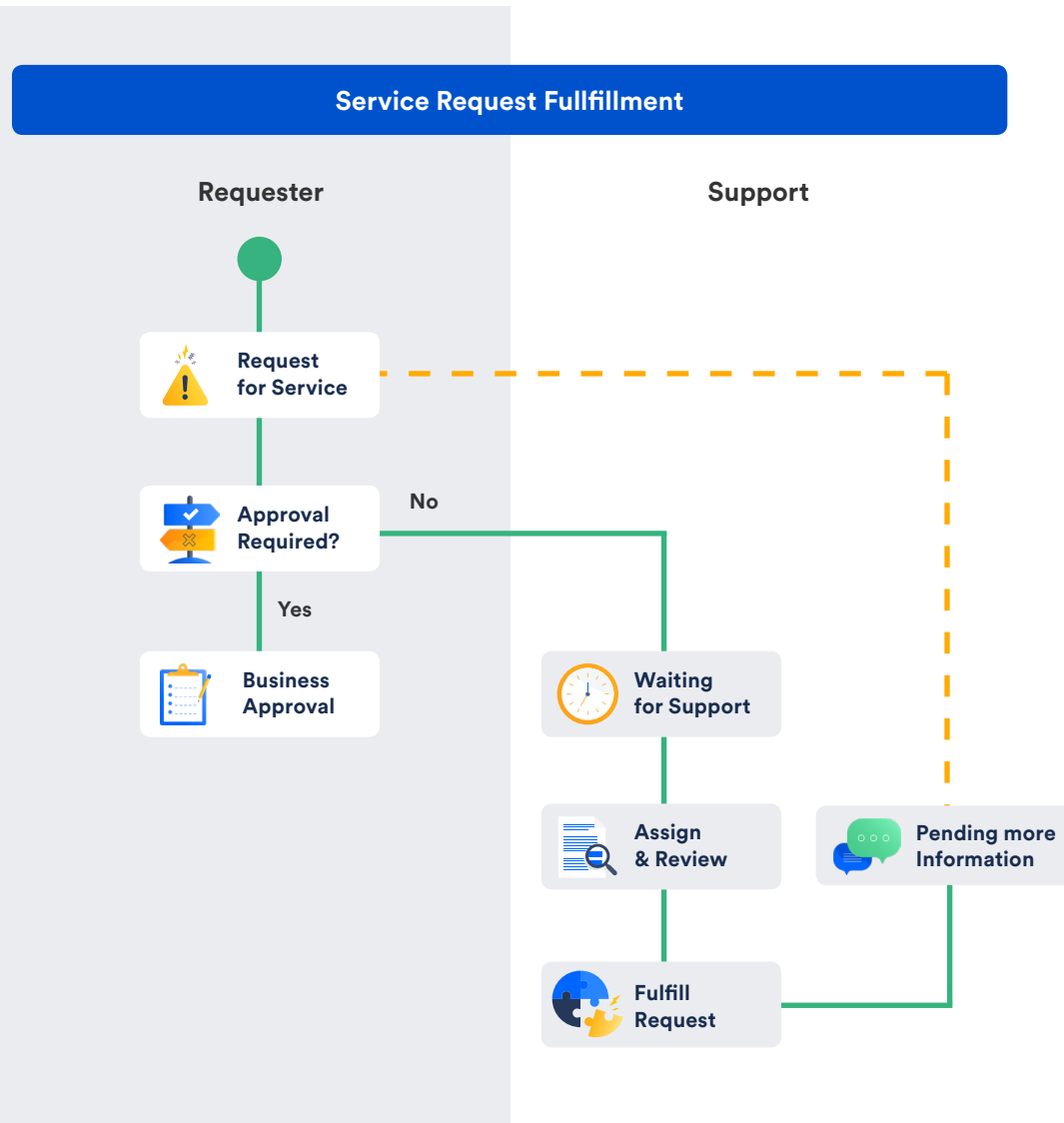
No matter what you call it, the premise is simple: Your users will need things from time to time, like password resets or software upgrades. They might ask for new hardware, or even for information about how to configure a new device.

In ITIL jargon, these are called service requests, and they are quite different from incidents. Remember, incidents are unplanned disruptions to your IT service. A service you normally provide is unavailable, or the performance has significantly declined.

Service requests aren't about outages at all. With service requests, a user is simply asking IT for something they typically don't already have — like access to a printer in the lobby, or a memory upgrade for their laptop.

These types of requests are typically low risk but high volume. Often, they're for services that are requested over and over again by different users throughout the company. So creating repeatable, standardized processes is key to achieving efficiency.

Here's an example of a typical ITIL-compliant request fulfillment process you can use as a starting point:



While ITIL offers in-depth guidelines (down to the specific form data you should collect for each service request), we'll keep it high level. Here are a few of our favorite tips for successful service request management:



### Make it easy for users to ask for something

Look for a service desk solution that allows you to create a single, centralized portal where users can do everything they need — from reporting incidents to requesting services. Ideally, it will also provide simple, prebuilt workflows for the approval and fulfillment process, with the ability to customize them to the needs of your team.



### Then, start with your most commonly requested items

Choose ones that are simple and easily fulfilled. This delivers immediate value to customers and allows the IT service desk team to learn as they build out future phases of the request catalog.



### Set clear expectations

Each service should have a clearly outlined approval process, fulfillment procedures, fulfillment team, process owner, SLAs, etc. before you add them to your request catalog.



### Automate at every opportunity

Low-risk requests shouldn't sit in your approval queue. Create workflows that approve them automatically, to reduce your backlog and improve customer satisfaction.



### Keep your users informed

Make sure users have a clear understanding of how long each request will take, and send them proactive status updates so they don't get antsy.

# Knowledge Management

With technology's constant evolution, knowledge is everywhere — in emails and texts, and on Facebook and Twitter. Chances are, your IT team's most valuable knowledge is scattered all over the place too. Even worse? It might be trapped in the heads of your employees, destined to eventually walk out the door as they pursue new opportunities.

To prevent this, ITIL recommends creating a knowledge management system, frequently referred to as a knowledge base. It serves as a central repository for the data, information, and knowledge that your IT organization needs to respond to issues faster, resolve complex issues more quickly, provide consistent answers, build better resources for learning, and even enable self-service.

But knowledge bases don't have to be restricted to internal, IT-only uses. Many companies also use them to enhance their self-service offerings to external customers as well, giving them a place to find answers to their own questions. To see an example of this in action, take a look at our own customer portal at <http://answers.atlassian.com>.

To get started effectively with knowledge management, you should:



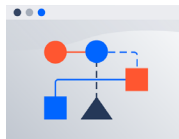
### Manage all your knowledge in one place

Start by aggregating your knowledge into a single repository that's simple to use, helps your team make better decisions, accelerate learning, and makes it easier for customers to find the information they need.



### Make it accessible and actionable

Agents are more likely to use and even refresh content regularly if it's easy to find and update — which improves first contact resolution and can even reduce cost per contact.



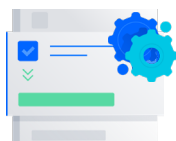
### Build your team workflows around knowledge management

Update your team policies to ensure that articles are written before changes are implemented — and require your agents to refine articles as they use them, so you always have up-to-date knowledge accessible for your team.



### Allow customers and agents to give feedback

This can be as simple as a “thumbs up” or as rich as a comments section. Either way, a feedback loop drives the quality and performance of your knowledge.

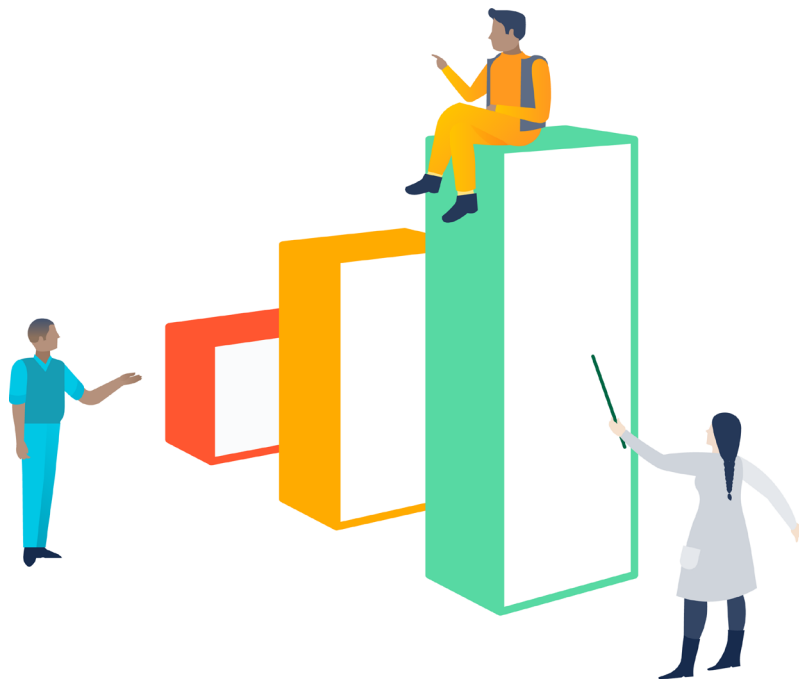


### Deflect tickets with self service

Creating a portal where customers can search for their own answers is great for customer satisfaction, and it's great for your team — resulting in as much as a 50% rate of incident deflection.

## Chapter 2

# Why ITSM Matters More Now Than Ever



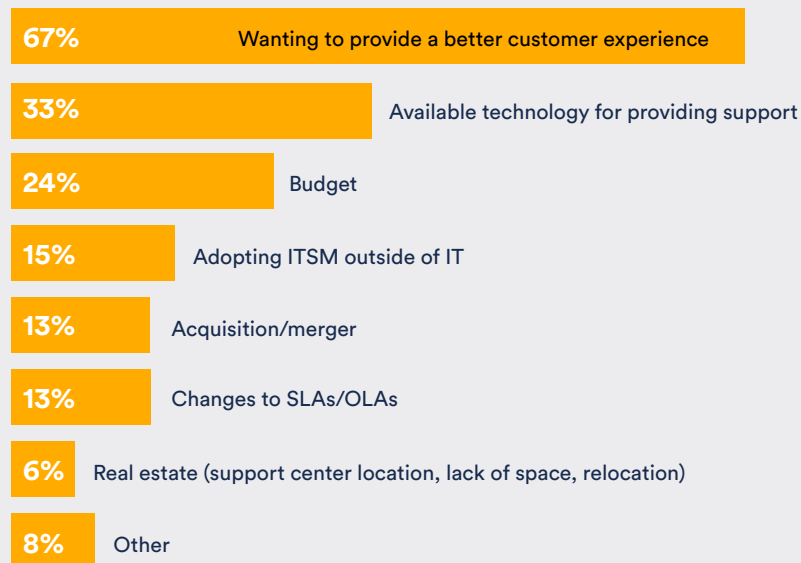
While popular ITSM frameworks like ITIL were initially created to improve your support processes and boost efficiency, an even more pressing driver is rapidly emerging: the consumerization of service.



As employees enjoy increasingly impressive and effortless experiences as consumers, they're upping their expectations of workplace technology too. If a car will pick you up in minutes at the touch of a button, why should requesting and receiving IT services be so hard? It shouldn't, and smart IT organizations are taking action. Today, over 65% of IT organizations are making changes in order to provide a better customer experience, according to HDI.

## REASONS FOR THE CHANGES IN SUPPORT CENTERS

(includes support centers that experienced a change in the past year.)



Percentage of support centers

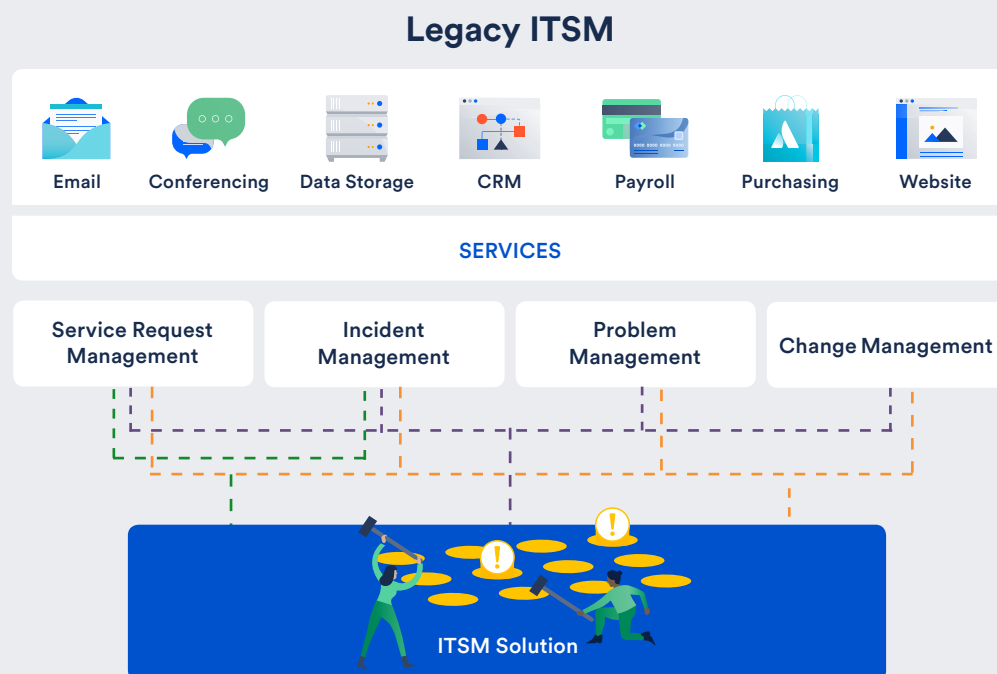
But the burden to provide great service isn't just on IT. Employees are bringing their high expectations to every other area of the business, from finance and HR to legal, marketing, and more.

Fortunately, ITSM isn't just for IT anymore. In fact, many top IT teams are helping their business constituents implement their own service desks complete with self-service portals, knowledge bases, and more. Once you show your employees just how easy it can be to get the help they need from IT, they'll often ask you to help them overhaul their own department's customer experience.

## Chapter 3

# Doing ITSM The Atlassian Way

Legacy IT solutions often took a very siloed approach. You had one tool for managing incidents, a different for handling changes, and several more for knowledge management, changes, and more. Integrations were difficult, costly, and clunky at best.



Naturally, IT teams couldn't stand it. They missed critical data insight they might otherwise have if they could see the bigger picture. They had zero line of sight into the dev team, and vice versa — so it was next to impossible to quickly identify how new releases or changes might be impacting service. Support and service quality suffered big time.

At Atlassian, we knew IT deserved a better approach. So we started from the ground up, building tools that help IT provide legendary service across every discipline, to every employee and customer:



**Jira Service Desk** is at the heart of it all. It's one tool (instead of four or more) designed to seamlessly handle the top ITSM capabilities that IT has to get right: managing service requests, resolving incidents, conducting problem investigations, and orchestrating changes to your production systems.

But IT also needs a better way to communicate clearly across the organization, and to customers. [Hipchat](#) allows quicker communication and collaboration between your internal teams, to resolve incidents faster. And [Statuspage](#) keeps customers informed 24/7 about the status of the critical services they depend on.

And at every step of the way, IT needs fast access to accurate information. [Confluence](#) brings your teams and their knowledge together in one place, putting critical documents, knowledge base articles and project and change plans at their fingertips the instant they need them.

Let's take a closer look at how you can use Atlassian to completely streamline the incident management process, as just one example.

## Atlassian in action: Incident Management

Let's say a critical service is down that impacts both employees and customers. Entire departments have screeched to a halt, and tickets are starting to pour in at your service desk.

Here's how Atlassian helps you take a more comprehensive, agile, and collaborative approach to incident management, across the entire lifecycle:



### 1. Identifying the incident

With Jira Service Desk, it's possible you already knew about the incident even before the first employee submitted their ticket. How? Your hardware, monitoring systems, and services can easily send their alerts directly into Jira Service Desk via open REST APIs. Quite a few vendors have already built out these integrations, and it's easy for you to create your own.

As system alerts come in, Jira Service Desk's built-in automation can help you properly categorize each incident, classify it as low or high priority, and even take over repetitive tasks like ticket routing, adding important comments to a ticket, notifying teams about issues that are about to breach SLAs and more. New automation rules are easy to set up via the user interface, with no scripting required.

At the same time, Jira Service Desk automatically searches Confluence for knowledge base articles, runbooks and troubleshooting guides that might be associated with the incident - and pulls the top recommendations directly into the incident.

As a result, your agents aren't blindsided. They often know about outages and disruptions long before they are reported, and with the right information already in hand, are hard at work on restoring the service.

## 2. Communicating

If this outage is impacting external customers, you want to let them know right away, and Statuspage lets you totally automate incident communication. You can integrate it directly with your monitoring and alerting tools, so customers stay informed of incidents, downtime, or even scheduled maintenance in real-time. And your status page is hosted outside your infrastructure with built-in redundancy so your page is up even if your service is down.

You can create a custom status page in minutes that customers can subscribe to to receive status updates via e-mail, SMS, or webhook. Users can subscribe to all updates or choose individual pieces of your service they want to stay up-to-date on. You can even create incident templates so you don't have to waste valuable time during an incident coming up with the right words to say to your users.

And private pages mean you can also provide your employees with a single source of truth for internal service status. Private pages feature authentication via IP restrictions, SAML 2.0 (and related vendors such as Okta, PingIdentity, and OneLogin), as well as Google Auth.

In fact, using Statuspage to communicate with customers and employees doesn't just increase transparency and build trust, it can reduce ticket volume too. By integrating Statuspage with Jira Service Desk, you can display incidents directly on your Jira Service Desk portal to reduce the surge of duplicate tickets at the source by as much as 30%\*.

### 3. Investigating

Incidents are often measured by the time that elapses from when they first occur to when they are resolved and closed, called Mean Time to Repair (MTTR). During most incidents, as much as 70% of the MTTR is spent in the investigation phase, trying to identify what actually happened.

Why? Because communication is difficult, and agents don't have the right information at hand. Emails and phone calls are notoriously terrible ways to collaborate quickly.

To start, Jira Service Desk gives your agents clear priorities, and a more context-rich place to collaborate. The most urgent issues are sorted to the top of the queue, and agents can bring each other into the discussion easily with @mentions. In this example, a service desk agent might @mention a database engineer and a change manager, who can see then see the full history of the incident and help swarm around the issue.

Embracing [ChatOps](#) takes it to the next level, though. In Jira Service Desk, a single click launches a Hipchat room dedicated to an incident, pulling in all the critical alerts, context, and even team members you need to swarm even faster. And if other teams mention your incident anywhere across your entire Hipchat ecosystem, you get notified, so you can discuss or work on your incident across the company in real time.

Finally, you can even link incidents in Jira Service Desk to other issues, change requests, bug reports, and even software projects in Jira Software, so you can track the status of potential dependencies and even alert other teams when you believe your incidents may be related.

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\*Source - [Statuspage.io](#)

## 4. Resolution and Recovery

Taking a collective approach to incident resolution like we've outlined above can reduce the MTTR for major incidents by up to 40%, in our experience.

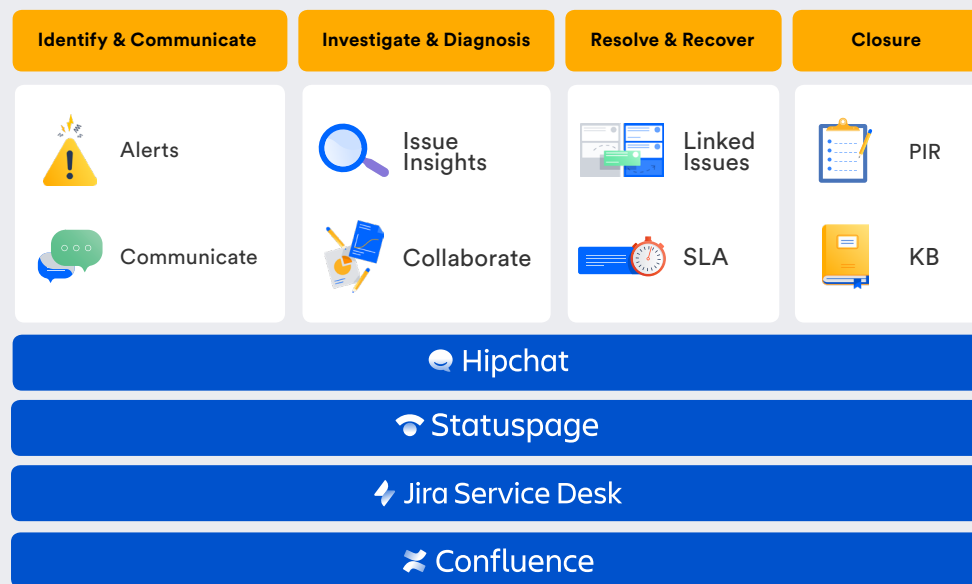
But the work doesn't end just because you found and resolved an incident faster.

Using Confluence to document the resolution and capture the critical insights you learned along the way should be a standard part of your Post Incident Review (PIR) process. You can even designate the actions you want to take as a result of what you've learned — like assigning knowledge base articles, or reporting software bugs to the development team.

Afterall, closing an incident doesn't always mean the underlying problems have been resolved. Jira Service Desk lets you create Automation Rules to keep linked issues in sync. So if your outage is caused by a software failure, for example, you would link the incident to a corresponding issue in the software team's backlog. Then, an Automation Rule could keep you notified (and even update your incident) once the underlying software issue has been resolved.

### Improve incident resolution with Atlassian

Mean Time to Resolution (MTTR)



## Conclusion

# Next Steps: See it in action

As employee expectations continue to rise, the service desk is on the hook for making IT services more customer friendly, not just more efficient. And frameworks like ITSM are a great start. But that doesn't mean you have to spend years studying ITIL process manuals before you can jump right in.

Start by choosing a modern, ITIL-certified service desk solution that makes it easier for employees and customers to ask for help and for agents to deliver it. Then, add ChatOps and knowledge base functionality to resolve incidents even faster, capture team knowledge, and work better together.

To learn more about Atlassian's approach to ITSM or to see a demo of this working for your IT team, contact an Atlassian Solution Partner.