

# ERP Managed Services

'Shift Left' – Driving down the cost of Managed Services

# We are Technology Agnostic

## We support multiple technologies across the enterprise

We are partnered with multiple technology vendors. This enables us to implement fully integrated ERP solutions, tailored to our client's individual IT ecosystems. It also allows us to offer Managed Services that continually improve our client's operating environments.

Our technology delivery centre (Gurgaon, India) is at the forefront of state-of-the-art delivery supporting multiple technologies, a sample of which are outlined opposite.

Our Technology Expertise	
Full Stack / Languages	
ETL	
Database	
BI / Analytics	
Cloud	
QA	
Mobility	
ERP/EPM	
CRM	
Smart Automation / AI	
UI / UX	
Productivity / Other	

# Our 'Shift Left' Approach to Managed Services

## Traditional support models are costly

The ever-growing business demand for digitisation means that modern support desks must be able to support the growing complexity of devices and technologies if they are to empower the business to work more effectively. The truth is that traditional 'tiered' escalation support models don't, they're outdated and usually lead to **higher costs, longer ticket resolution times** and **frustrated end users**.

## Common Challenges:

- Skilled support SME's lose time working on tickets instead of the more complex projects that add real value to the business
- Support teams find themselves repeatedly resolving the same incidents, wasting manual work on tasks that could be automated or incidents that could be resolved at source
- Employees expect modern consumer-like experiences when they need help; easy access to information and where appropriate the tools to solve problems themselves, rather than waiting for help – this leads to frustration and dissatisfaction
- Most IT departments aren't successful at capturing, using and maintaining shared knowledge, leading to key person risks and a lack of continuous improvement strategies
- Management want to enable more automation of tasks but don't know where to start or are not successful at identifying the best opportunities for automation

Panamoure recommend adopting a '**SHIFT LEFT**' strategy that involves shifting the resolution of support desk tickets down from more costly resources to first line of support and end users (through self-service and automation). This not only reduces operating cost and frees up time for IT to focus on strategic improvements, but it also improves service delivery and end-user satisfaction. A win-win for everyone.

# Shift Left Pushed Tickets to Self-Service & Automation

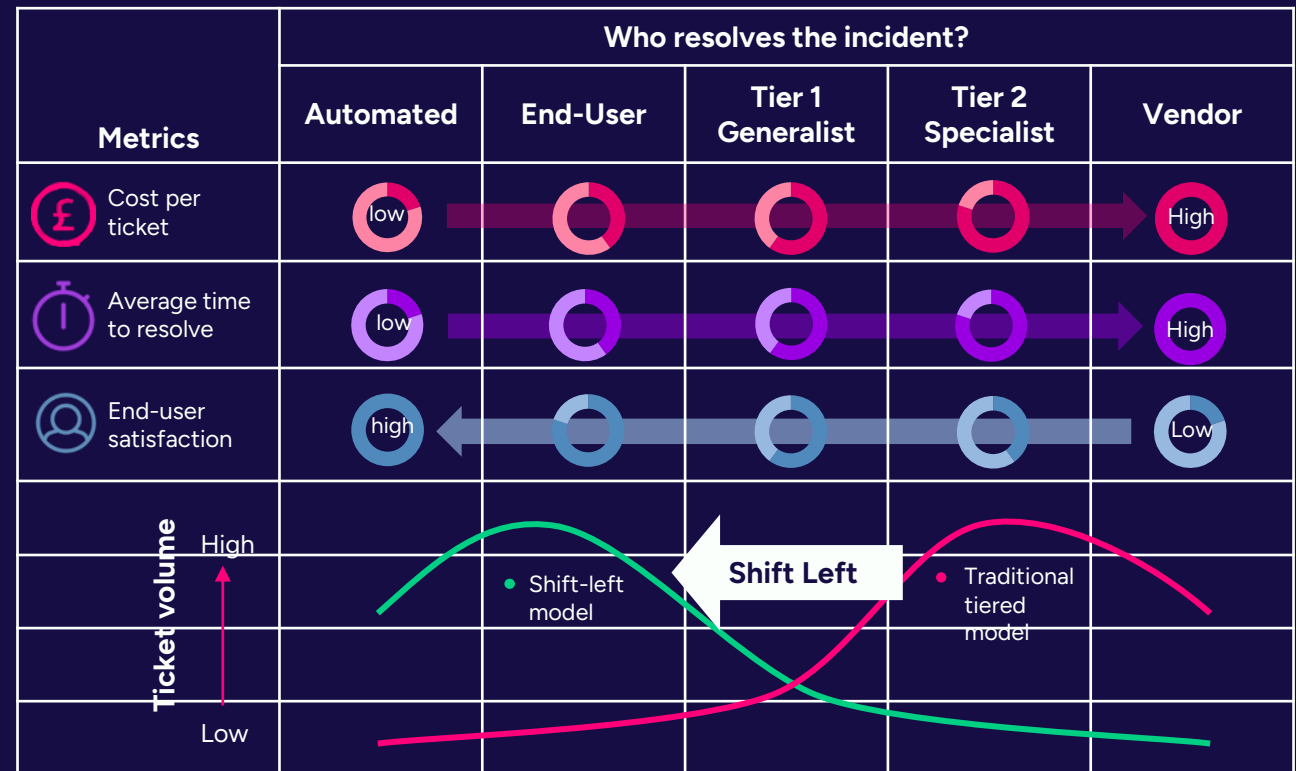
The further right a ticket is resolved:

## Common Challenges:

- **Cost per ticket** increases as more costly resources are doing the work
- **Average time to resolve** increases as the ticket gets escalated
- **End-user satisfaction** decreases as they wait longer for resolution and lose touch with the status of their ticket

In a **traditional tiered model**, the majority of tickets are solved towards the "right" end of the scale by the service desk, with many being escalated to Tier 2 and beyond.

A **shift-left model** sees the majority of tickets solved towards the "left" end through self-service and automation.



# Why Adopt the 'Shift Left' Approach?

## Benefits

Embracing a shift-left strategy by moving support desk tasks and requests into lower cost deliver channels such as self help tool an automation can significantly reduce time to resolve, reduce support costs and increase end user satisfaction.

### Benefits for IT

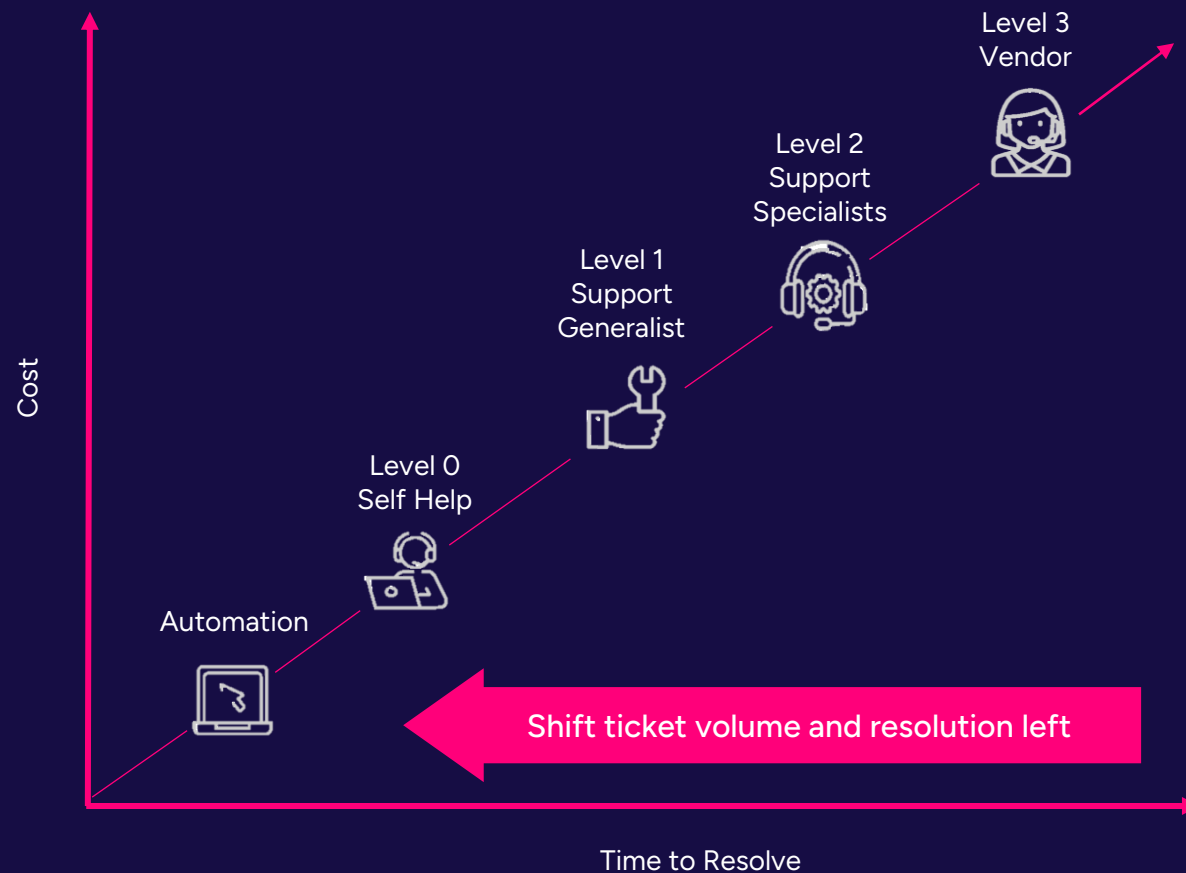
- **Reduce repetitive tasks:** Automation and self-service reduce the amount of time IT has to spend on repeated low-value tasks.
- **Decrease ticket volume:** The ultimate goal of shift left is preventing a ticket from coming to the service desk.
- **Reduce time to resolve:** Providing tools and knowledge to frontline staff and users reduces the amount of troubleshooting time and escalations, which should lead to a reduction in overall resolution time.
- **Free up time for project work:** Specialists will have more time for project work when they shift tickets left.
- **More efficient processes:** Documentation and automation will streamline manual processes.

### Benefits for the business

- **Increase end-user satisfaction and empower employees:** Self-service and more efficient ticket resolution will improve customer service and the overall customer experience.
- **Improve business productivity:** When users aren't left waiting for solutions so that they can do their work, they have more time to be productive.
- **Reduce costs:** While this shouldn't be the only goal of shift left, it can be a result of shifting support into lower-cost delivery channels.
- **Better allocation of resources and alignment to the business:** The IT team will have more time to focus on complex tasks, innovation, and strategic projects.

# Our Approach

Shift left strategy moves repeatable requests into lower cost delivery channels



## Panamoure Approach

Move issue resolution as close to the front line of the service desk and the end user as possible and reducing the amount of escalations right.

- As seen in this model, the further a ticket gets escalated, the more cost and time is involved in resolving it.
- Moving resolution to Level 1 of the service desk empowers front-line staff with tools to solve more issues, reduces wait time for users, and frees up specialists to focus on projects and problem management.
- Moving solutions to self-service empowers end users to solve their own issues, increasing customer satisfaction, and reducing overall ticket volume.

Successfully shifting left can reduce time to resolve, decrease support costs, and increase end-user satisfaction.

# Keys to 'Shift Left'

## Knowledge Management, Self-Service and Automation

### Focus for shift left optimisation:

- A comprehensive knowledge management program (Business and IT)
- A user-friendly self-service approach
- A holistic view into automation opportunities

### Practically, shifting service support left translates into:

- Speed up resolution to focus on getting users productive faster.
- Eliminate wasteful processes wherever possible.
- Empower the service desk with the access, knowledge, and equipment they need to resolve issues at first contact.
- Build a strong knowledge management practice to share knowledge across the IT and Business teams, ensuring escalations go to only those necessary.
- Specialists proactively identify issues that could be solved at the service desk through training, knowledge sharing, or problem management.
- Automate manual, repetitive tasks with scripts, workflows, and templates.
- Knowledge Management must continually ensure the knowledge is usable and up to date.
- Empower end users with the ability to solve their own issues – thus preventing a ticket – through a comprehensive self-service approach.

# Example Tool Kits

## Building a strategy to shift service support left

	① Prepare to shift left	② Design shift-left model	③ Implement & communicate
Phase Steps	1.1 Determine readiness to shift left 1.2 Make the case 1.3 Define metrics to measure success	2.1 Shift resolution to Level 1 2.2 Shift resolution to end user 2.3 Shift resolution to automation	3.1 Implement changes 3.2 Communicate to increase adoption
Phase Outcomes	<ul style="list-style-type: none"> <li>• Understanding of shift left and how it applies to your service desk</li> <li>• Prerequisites assessment to determine whether you are ready to shift left</li> <li>• RACI outlining high-level accountability and responsibilities for the project</li> <li>• Documented objectives for the shift-left program</li> <li>• Stakeholder presentation to get buy-in for the project</li> <li>• Documented critical success factors based on goals</li> <li>• Defined KPIs and metrics to measure the success of shift left</li> </ul>	<ul style="list-style-type: none"> <li>• Documented process workflows to embed knowledge creation, usage, and review in service desk processes</li> <li>• Documented KCS strategy, responsibilities, and metrics</li> <li>• Strategy and identified opportunities to improve self-service portal and increase its adoption</li> <li>• Plan to continually improve, update, maintain, and measure the success of the self-service portal</li> <li>• Self-service workflow and checklist</li> <li>• Strategy to leverage AI and automation to support the shift-left strategy</li> <li>• Identified candidates for automation</li> </ul>	<ul style="list-style-type: none"> <li>• Incident management workflow with shift-left opportunities embedded</li> <li>• Documented responsibilities specific to shift left for each role</li> <li>• Completed shift-left action plan to track and manage opportunities</li> <li>• Documented communications plan and objection responses</li> </ul>



# Example Tool Kits (Cont.)

## Determine readiness of existing support desk function to shift left

<b>Service Desk Essentials</b>	<ul style="list-style-type: none"><li>• Service desk processes and procedures are documented clearly and service desk agents adhere to them.</li><li>• The services offered by the Service Desk are clearly defined, documented, and communicated throughout the organization.</li><li>• All end-user incidents and requests come through a single point of contact and are logged and tracked as tickets in an ITSM tool.</li><li>• KPIs/Metrics for the service desk are defined, communicated, and tracked.</li></ul>
<b>Process standardisation</b>	<ul style="list-style-type: none"><li>• There are documented, standardized procedures for opening, assigning, monitoring, escalating, resolving, closing, and communicating progress on tickets.</li><li>• The Service Desk makes an initial assessment of all requests and incidents they receive, attempts to resolve them, and escalates them based on agreed service levels when necessary.</li><li>• Process workflows are defined for incident and critical incident management.</li><li>• Escalation rules and paths are defined either by tier or by priority level.</li></ul>
<b>Ticket handling</b>	<ul style="list-style-type: none"><li>• Ticket handling expectations are clearly documented and communicated, and service desk agents follow these guidelines.</li><li>• Tickets distinguish between service requests and incidents, and are effectively categorized in the ITSM tool (e.g. using a mutually exclusive and collectively exhaustive [MECE] scheme).</li><li>• Tickets are prioritized into at least three priority levels and handled according to priority.</li><li>• Time to resolve tickets and the number of tickets in the backlog is reasonable.</li></ul>
<b>Shift Left Enablement</b>	<ul style="list-style-type: none"><li>• Knowledge articles exist somewhere, and the service desk understands the benefits of sharing and documenting knowledge.</li><li>• A tool exists to support an integrated knowledgebase.</li><li>• There is a capability to launch a self-service portal for end users, either through the ITSM tool or another means (e.g. LMS, intranet, SharePoint).</li><li>• The team has the capability to configure the tool to support automation (e.g. through ticket templates, scripts, workflows).</li></ul>



# Thank you!

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