



WHITEPAPER

## SERVICE DELIVERY AUTOMATION & PROCUREMENT (SDAP)

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- **INTRODUCTION**
- **UNDERSTANDING THE PROBLEM**

## **SDAP IN A GLANCE**

- Web-based application that leverages MS SharePoint (SP) for data storage, workflows, and management.
- No other third party application is required at a minimum.
- Works with 2010, 2013 +, on-premise or 365 cloud based SP.
- Full control over creating many types of products and services ticketing for procurement and modification requests.
- Role-based dashboards allowing full transparency of workflows and statuses.
- Workflow modifications for ad-hoc.
- Customizable User Interface (UI) for optimizing User Experience (UX).

## **INTRODUCTION**

The Service Delivery Automation and Procurement (SDAP) tool is an enterprise-level business operation transformation application that answers the difficulties of finding the right delivery management solution and meet challenges where other IT Service Management (ITSM) tools lack.

In this whitepaper you will find how we approached bridging the gap of understanding the problem, providing the solution, the benefits, and how this application has transformed one government agency through it's performance statistics.

## **UNDERSTANDING THE PROBLEM**

Many ITSM tools are focused on delivering a ticketing and IT service management system without thinking about the main problem which is the delivery transparency of the service. Customer experience is often forgotten and the service teams are often left making excuses when management is inquiring why certain service levels agreements are not being met.

Deciphering many IT teams workflows and their internal difficulties when sharing information among other teams tends to be the underling issues when trying to deploy an enterprise level ITSM tool. This transparency issue then leaves everyone at a disadvantage when the ultimate goal of providing the best possible service is actually attainable through the use of proper information, tools, and communication.

## • THE SOLUTION

### SOLUTION KEY POINTS

- Bottom-Up design approach starting with the end goal of providing the best customer experience.
- Designed for three primary customers:
  - product/service requestor,
  - service team member,
  - management/stakeholders
- Use existing or opensource enterprise level tools.
- Transparency of communications.
- Best calculated delivery dates based on past delivery metrics.
- Bundling multiple requests to make up an single order.
- Customizable workflows for service tasks which can be placed in stages.
- Fully customizable reporting and data sharing using multiple methodologies.

## THE SOLUTION

At Sev1Tech, we developed the SDAP tool with the bottom-up approach where the transparency to the customer is the focus.

SDAP leverages existing application(s) like SharePoint with the goal of delivering an ordering lifecycle for products and services without the heavy investment.

The SDAP process tools are designed with the customer's user experience (UX) in mind which considers the transparency needed across the customer, service delivery team members, and decision making management.

SDAP allows for customizable Product/Service workflows through Microsoft SharePoint which each team manages required tasks and its Service Level Agreements (SLA). This customization enables each individual team to manage best practices and constant process improvement.

SDAP also focuses on automating many communication tasks as possible through the customizable processes within Microsoft SharePoint.

Our methods of creating customizable user interface (UI), product/service based workflows, creating proper communication channels, sharing of information across systems capable of web APIs using existing enterprise level is the key to our solution.

At the end, customers are in disbelief that they were interacting with SharePoint.

- **THE IMPORTANCE OF TRANSPARENCY**
- **CONTINUOUS PROCESS IMPROVEMENT**

## TRANSPARENCY SOLUTION

- Though careful UI/UX design, information can be found very easily.
- Using metrics over time, delivery dates are more accurate.
- Continuous Process Improvement using metrics and team evolution.
- Team documents to complete tasks are accessible and updatable.
- Messaging capabilities for each task process.
- Customers, Team members, Management can track every service team related workflow—stages/tasks and logs.
- Communications to each roles are performed automatically for every task when needed.
- Daily communication can be automated to inform team /management of performance statistics.
- Alerts can be set up to inform team members or management of SLA deficiencies.

## THE IMPORTANCE OF TRANSPARENCY

SDAP is designed around transparency. From the bottom-up design focusing on the customer, SDAP calculates the delivery time for the products or services at the time of order. The team members all share the responsibility to complete the request timely by monitoring the entire workflow and to get specific alerts when the tasks are assigned to them. Each team member has all the necessary documents at their fingertips to complete their tasks through libraries and historic logs.

SDAP employs a clean design of all information, communications of tasks, and the ability to capture every status change or lack of. This is the key to knowing if a request will meet the SLAs and also allows for continuous process improvements.

## CONTINUOUS PROCESS IMPROVEMENT

Through the teams effort of completing each assigned task, metrics are stored over time to help determine a better workflow and to define what the proper SLA should be. Adjustments of parameters for any workflows' stages and tasks are done at the SharePoint lists which will capture information for reporting. In addition, each team has the ability to update proper execution documentation and access historic data to assist in completion of their team task(s).

# THE SDAP PROCESS

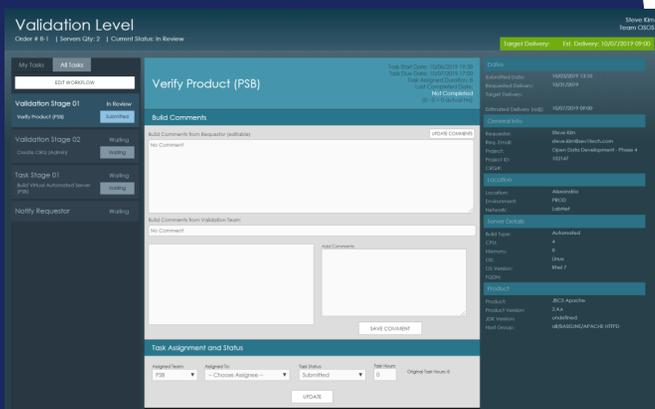
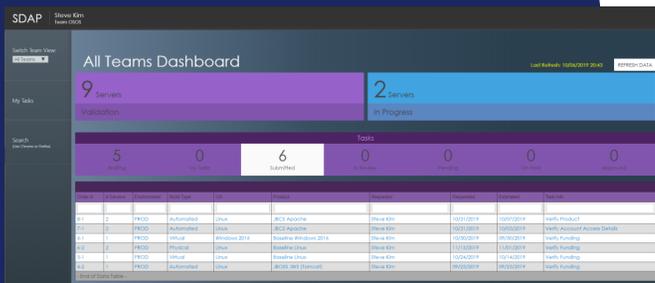
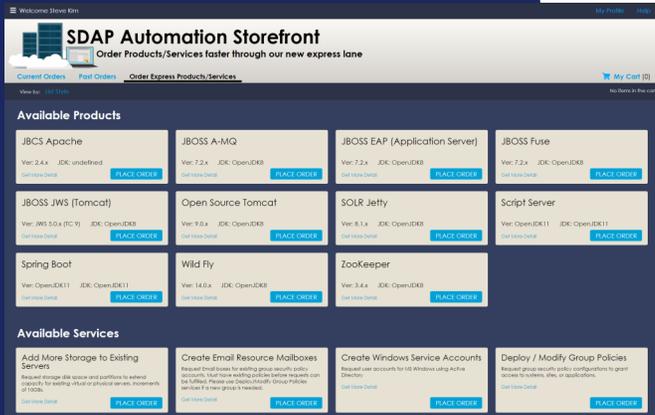
## THE SDAP PROCESS—Typical request lifecycle

SDAP has three primary customers: requestors, team members, and managers. The requestor initiates a request using a web portal storefront. Automatically, a user profile is created for any new requestor in SharePoint. This profile stores the user information from Active Directory and all tracking data.

A single or multiple requests are rolled up into an order. The requestor receives an estimated date of completion and an order number which will be used for the SDAP tracking. Tracking orders are accessible by anyone and contains non-editable information that are similar to the team member pages. Emails are sent to the requestor confirming the order, and also an email is sent to the first stage workflow team which is usually the validation team.

The team member email contains the type of workflow task assigned to them and the link to the team site. If the team member is new to SDAP, they will automatically get a team assignee user profile generated prior to using the SDAP tool. The team assignee confirms which team they are associated with and then can proceed using the SDAP team portal to access the task assigned to them.

The SDAP team portal allows for all teams members to see the same requestor information and all the workflow associated with the product/service. The workflow of multiple stages and tasks are divided between two types: Validation, Tasks. Validation stages must be completed before Task stages are allowed to proceed. Stages are multiple tasks that can be performed simultaneously. Emails are sent out to task team assignees when a stage is completed. A final approval notification email is sent to the requestor when the last stage is complete. The requestor can accept or reject the completed request.



## • SDAP WORKFLOWS and Tasks

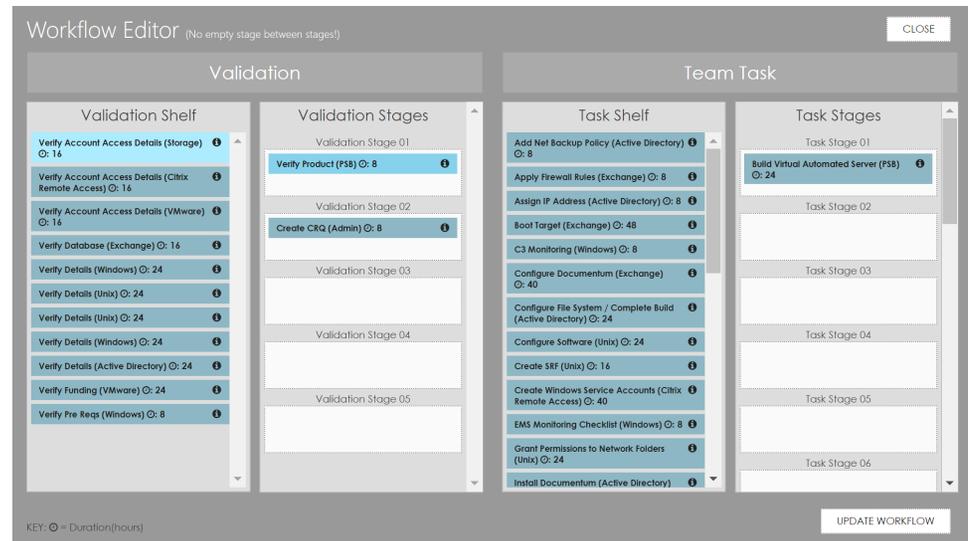
### WORKFLOW CAPABILITES

- Step by step creation and modification of workflow tasks.
- Ability to set custom questions that the requestor will need to fill at the time of the request of the product/services.
- Upload/Maintain task support documents
- Designate task leaders or default members.
- Enter workflow tasks estimated completion hours for delivery date estimation and SLA performance.
- Setup alerts/notifications with email routing capabilities.
- Setup triggers that send/receive information to other network web-based applications through APIs. \*

\* May require additional configuration and cooperation from different groups

## SDAP Workflow and Tasks

The core solution of SDAP is the step by step creation and simplicity and flexibility of using workflows for any products and services.



Example of the drag and drop task assignments for any stage based workflow

Tasks are defined with input fields or documents that will give the team member the ability to support the completion of their task or to assist in completion of other tasks related to the request. Estimated duration time field are provided to help calculate estimated delivery dates and for SLA metrics.

- **SDAP DEVELOPMENT PROCESS**

## DEVELOPMENT KEY POINTS

- Agile Development Phases
- Bottom-Up design approach starting with the end goal of providing the best customer experience.
- Designed for three primary customers:
  - product/service requestor,
  - service team member,
  - management/stakeholders
- Use existing or opensource enterprise level tools.

## SDAP DEVELOPMENT PROCESS

Using the agile development methodology, the SDAP team will capture the user stories and simplify complex product/service workflows into actionable processes that will be cycled into repeatable phases: Discovery, Design, Develop, Discuss, Deploy.

At first, the four primary web applications are created:

- SDAP storefront
- Requestor tracking dashboard
- Team dashboard/portal
- Team fulfillment form

Once the primary SDAP applications are in production, manager/stakeholder dashboards will be created for reporting and monitoring.

Future expansion of automation can be phased in, such as:

- Pulling in task or asset dependencies
- Automation of CRQ tickets with BMC Remedy or Service Now
- Routing data to or from SDAP (may use opensource middleware - Apache NiFi) to other applications
- Customized reports outside of scope.

- SDAP BENEFITS
- CASE IN POINT

## SDAP BENEFITS

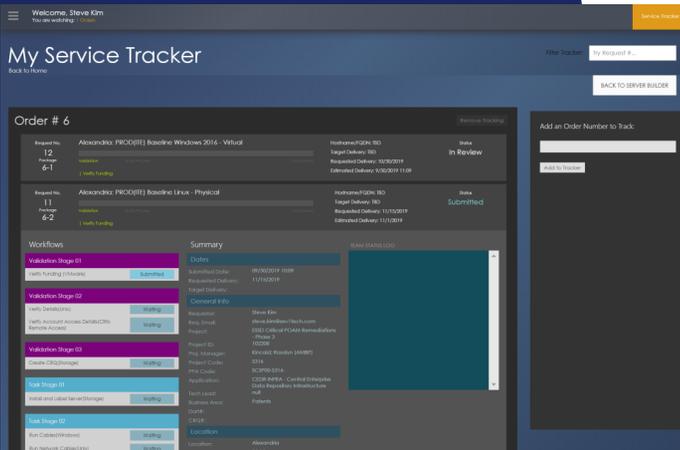
Every user of SDAP will benefit from the transparency of system.

Requestors no longer will wonder where their request is, and which task or whom are responsible for any stalled request.

Team task members benefit from full communication of each tasks and the team members/leaders can get daily status of the amount of requests currently or may come into their pipeline. This helps with estimating SLA adjustments and personnel.

Management has the ability to report on current and historic product/ service data at any point in time.

After a few months of deployment when the SDAP process is normalized and integrated with all the stakeholders, SDAP runs with little modifications from SharePoint power users and admins.



## CASE IN POINT—USPTO

Prior to deploying SDAP in 2013, USPTO was using SharePoint OTB forms and workflows to administer Server deployment among eight different teams. Complaints were heard from all users and meetings were held every morning with management to address the status and complaints. Today, meetings are seldom and complaints are rare.

### Impact of SDAP Automation (POC)

Metric	Pre SDAP (<2013)	SDAP (today)
Monthly Server Requests	40	400+
Yearly Server Builds	480	5500+
Completed On Time*	<5%	>55%

\*Server completed before or on the requested date