

IT process automation: five key stages on the road to success.

If you're considering automating your IT processes, working through these five preparatory stages will help get your organisation ready



Introduction

Are your systems administrators spending hours of their valuable time on tasks that can't be ignored, but which are repetitive and less than challenging? How long does it take them to reboot servers, delete files to free up disk space or provision new-user services? If only you could increase efficiency by automating some of these day-to-day processes, you'd have more resources to devote to higher-value projects and strategic business programs.

Industry analyst David Williams of Gartner, Inc.¹ observes that IT organisations are starting to look at tools for IT process automation (or run book automation), to help them gain control over automating IT operations processes. IT process automation (ITPA) is designed to capture organisational knowledge so that repetitive, manual tasks no longer have to be carried out by your staff, and the organisational risk of information exclusivity is reduced. In addition to enabling you to make better use of your team's time and expertise, ITPA also reduces service variability by minimising the risk of human error, and eases the burden of documentation, notifications and reporting requirements that may accompany processes.

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Furthermore, your ITPA solution should enable you to drive continuous improvement and operational efficiencies across the IT department's sphere of activity, by including tools that let you measure, refine and optimise your processes.

According to a Gartner poll¹, 45% of IT managers consider change management and configuration management to be the most important processes to automate, followed by provisioning, then fault and problem management. Of the IT managers questioned, 10% have already purchased an ITPA solution, 6% have already budgeted for automation tools in 2008, and 21% have plans to purchase automation tools at some point during the year — giving an end-of-2008 adoption rate of 37%.

Preparing to take the plunge

For every organisation, the road to ITPA will be different, but there are five key preparatory stages common to all, that will help you make a faster return on your investment. By getting it right first time, you'll be able to make immediate savings in staff time, and gain efficiencies that will help your team deliver better value from IT to your organisation over the longer term.

Of course, there's no point automating a bad process, so it's worth considering whether you can improve any of your processes before you automate them. And for some processes, setting up automation may be more trouble than it's worth. Achieving the ideal scenario of fully automated IT operations involves rather more than just investing in an ITPA solution, but following the five stages outlined below should help ensure you get on track for a successful implementation.

1. Which processes need automating most urgently?

One of the most reliable ways of working out which processes are crying out for automation is to listen to what your colleagues — users and IT administrators — are saying or complaining about. Which tasks take too long, which are the most mundane, and which ones seem to cost more than they should?

You might hear that it's a struggle to keep servers up to date with patches, or that publishing web content is a frustrating and long, drawn-out process. Maybe updating help desk tickets or having to regularly fix an application with memory leaks is tiresome or overly time consuming. And if you've implemented virtualisation, it may become apparent that the IT team spends a lot of time adding virtualisation software to servers.

It's also worth finding out which processes are being automated by your partners and by other companies in your industry sector. Not only can this be a useful guide to which areas of process

automation could best save you time, it will also help your organisation avoid getting left behind in the race to stay competitive and cost efficient.

2. What's the best approach to automation?

ITPA can be implemented at the macro level — for instance, automating standard changes across departments — but only if your organisation is ready to do this. Your state of readiness depends fundamentally on your organisation's level of process maturity — for example, do you already have mature ITIL processes?

If not, you'll probably be more successful if you start ITPA at the micro level. A micro-process is a task like new-user provisioning or server rebooting. You'll find these micro-processes easier to define, and therefore easier to automate, and you'll quickly see the advantages of automation such as improvements in quality and savings in time and resources.

It's therefore worth reviewing the processes you identified in stage 1 as benefiting most from automation, and working out which are micro and which are macro. By combining that information with your assessment of your organisation's level of process maturity, you'll be able to work out whether to aim for top-down, macro-level process automation across functional areas, or take a bottom-up approach and start at the micro level.

3. How do you decide where to start?

The best way of deciding which processes to automate first is to work out the value each micro and macro process provides to your organisation, and what potential there is for reducing cost or improving quality — or both.

Reducing cost is about enhancing the efficiency of delivering IT services. For instance, by shortening the time to provision new services, you ensure

less time is wasted waiting for a new service — and the opportunity to generate more revenue from the new service arrives sooner. Other efficiency improvements can result from offloading repetitive tasks that require little or no analytical skills; slashing the burden of manual review requirements; and optimising the use of resources and inventory.

Process automation that improves quality does so by reducing defects in service delivery. This may be by minimising unplanned downtime; by removing the need for re-works; or by improving communication and therefore the accuracy and timeliness of the process.

Different organisations will prioritise different benefits. By evaluating which automated processes will bring the most benefit to your own organisation, you'll be able to work out where to start focusing your automation efforts.

4. Which automation tools do you need?

You're doubtless already using management tools that enable you to monitor, provision and carry out diagnostics. Before you start choosing an ITPA platform, you should make sure you know what tools you're using, what tools are available that aren't yet in use, and what capabilities are missing, as it's vital that the platform you select can integrate and use the information generated by your tools, and fill any gaps that might exist.

Among the ITPA solutions on the market, some work better at the macro level — facilitating cross-silo interworking; while others are more suitable for micro-level application.

However, even if you decide to start your automation efforts at the micro level, it's worth bearing mind that an exclusively micro-level solution won't be able to grow with you as you extend automation at the macro level. Similarly, you may find that even if your organisation is ready to automate macro-level processes such as change or incident management

(as defined by ITIL), you may well ultimately need to automate micro-processes too. So for optimum integration and functionality, the ITPA solution you select should ideally let you address both micro- and macro-level processes in a single platform.

5. How do you get your staff on board?

The final — but crucial — element of preparing for ITPA is to get your staff on board. If you really paid attention to their views on which processes need automating most urgently, it shouldn't be too hard to win them over to the benefits they'll see. It's important to make clear the results you expect from automation, and also what their roles will be and how they can contribute to the success of the project.

If staff members are reluctant to relinquish 'special knowledge', or are worried about how their jobs will change, you can reassure them that the aim of automation is to release them from some of their more repetitive and unrewarding tasks. Make sure they understand how to plan to use their reclaimed hours, and that there will be plenty of interesting, business-critical work to do, that will enable them to switch their focus from operational matters to high-value, strategic projects and activities, such as new-service design.

Conclusion - It's never too soon to get started

Whether you decide to approach ITPA initially from the micro or macro angle, the key thing is to start your project as soon as you can, so that your organisation can begin to reap the benefits and maintain its competitive position. Because automating processes captures organisational knowledge, you'll reduce the risk of information flight. And if you haven't yet implemented ITIL, automation will help you lay the groundwork for doing so more quickly.

Preparing your team and the wider organisation by working through the five stages outlined in this



paper, combined with selecting an ITPA solution that will help you automate both repetitive operational tasks and cross-silo processes, will enable you to enhance efficiency, reduce the potential for human error, speed up delivery of new services, and enable rapid return on your investment in IT process automation.

At NetIQ, an Attachmate business, we're ready to support your ITPA aims of controlling cost and risk with Aegis, our automation platform that enables the modelling, automation, measurement and continuous improvement of all levels of IT processes. Our unique approach emphasises building in success from the bottom up, so that you can achieve process maturity one step at a time. You'll enjoy quick wins by automating repetitive tasks; and you'll also have a future path for automation of cross-organisational processes. The ultimate outcome will ensure improved IT services levels, accelerated responsiveness to the business, and increased IT efficiency.

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