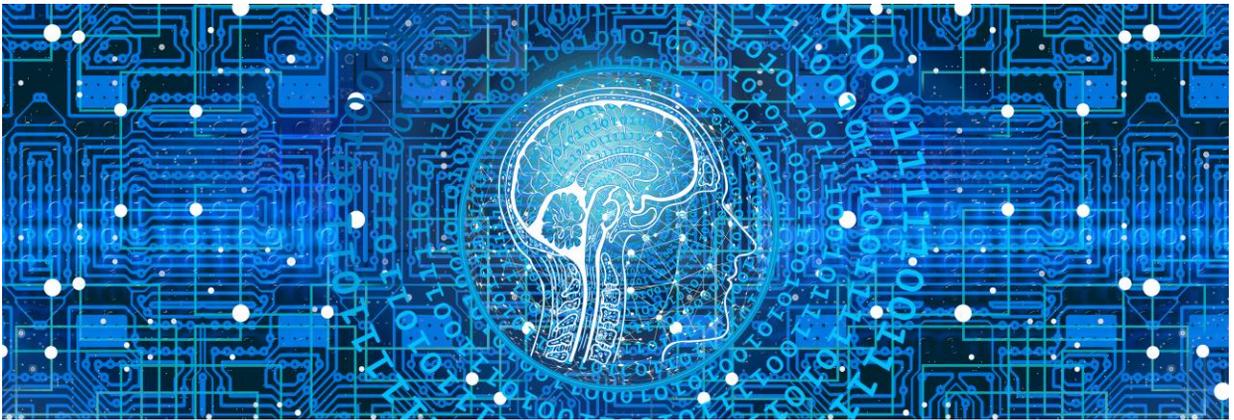


The Brain of Service Management: A Federated System of Record

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It is one thing to collect data; it is another to prepare all that data so that you can make the best decisions in response to a 360-degree view.

According to a [recent Forbes survey](#), just 34 percent of executives have achieved a single view of the customer as a result of aggregated customer data. Contributing problems include scattered or siloed data (51%) and applications (52%).

To meet your service management goals, your business collects data from multiple, disparate systems of record (e.g., CRM system, ERP system, knowledge management system), usually maintained by their respective departments. But without a method of consolidating that data in one place, the risk is high for inefficiency, errors, and a host of other problems in your service management efforts.

The answer is a federated system of record.

Your physical brain collects data—in real time—from all systems in the body in order to prompt the right responses. In a similar way, your service management needs a federated system of record, with data collected from every other relevant system, to prompt enhanced visibility and informed action.

Systems of Record: Federated Vs Single

Whether your main system of record is federated or single, the goal is to have a golden record, the single version of the truth. And the benefits are similar.

A **single system of record** centralizes the golden record in one source, one application. A **federated system of record** distributes that golden record across the organizations' various systems of record, ideally in best-of-breed applications.

There is a place for both a single system of record and a federated system of record. The main advantage of a single system over a federated system is that users are aware of a one-stop shop for accessing, modifying, and reporting on the single version of the truth.

The main advantage of a federated system over a single system is that users can work in best-of-breed applications that are familiar to them. But both types share numerous other benefits, listed later in this document.

Disparate Systems of Record Impede Multi-Departmental Service Management

Imagine that your organization has customer data in the CRM system and separate, siloed data about the same customers in the ITSM system. When data about a customer updates in one system without updating in the other, the data is inconsistent—because in one system, the data is now either obsolete or missing.

Considering the pace that organizations must maintain, chances are that the inconsistent data multiplies exponentially in a very short time. But a lack of data integrity is just one problem.

Your organization also faces reduced control over records, leading to a lack of governance. It becomes increasingly difficult to modify all the records that must be modified, because most employees who update data do not have access to all the systems where that data must be updated.

Now, imagine the departments in your organization attempting to collaborate with one another, all department personnel relying on their own systems' data. It is the perfect setup for frustrated business users, underserved customers, skewed reports, and exasperated leadership.

A Federated System of Record for Effective Service Management

Because service management initiatives depend on the harmonious work of many departments, an organization needs a federated system of record, the one source of truth, that can be trusted for accurate, up-to-date data.

How does a federated system of record make service management more effective?

1. *Enhanced visibility.* A federated system of record gives you a 360-degree view of a customer, a resource, or any other item you wish to measure.
2. *Better control over records.* Access and modify records easily from the preferred application or from any application that is integrated bidirectionally.
3. *Enhanced availability.* An up-to-date repository of data allows for ready access and agile turn-around times for reports and analytics.
4. *Integrity of data and processes.* With real-time data exchange, duplicate data stays in sync, eliminating the risk for data to be modified in one place and forgotten in another.
5. *Automation.* Reduce errors, and eliminate the amount of time spent on managing the consistency of data.
6. *Better customer service.* A federated system of record enables better customer service and better, more informed conversations between customers and support.
7. *Higher agent satisfaction.* Having a trusted, credible source of truth gives the service-management agents the confidence they need to do their work.
8. *A single system of action.* With integrated systems, you can direct all customers or staff to a single portal, if you prefer, to manage their service requests.
9. *Familiar tools.* Integrated systems can allow personnel from various departments to work in tools that they know well, without their having to log into a different system—and spend hours learning that system.
10. *Agile technology replacement.* With a federated system of record, you can swap out any technology for service management without rebuilding everything that had been created for the existing technology.

11. *Extended value of IT service management.* Organizations that use a service management tool such as ServiceNow often task IT with the hosting of such a tool. But as the service-management capabilities extend to other departments, the value beyond IT often becomes evident.
12. *A more competitive business.* With increased productivity, enhanced customer satisfaction, and better visibility and automation, your organization maintains a competitive edge.

How to Create a Federated System of Record

Organizations often attempt one of four approaches to creating a federated system of record.

1. Most companies start out with a **swivel-chair approach**. This method requires reading data from one system and entering it in another tool. Obviously, this approach does not allow for real-time synchronization and raises the risk for human error. Companies quickly realize that such an approach is inefficient and not scalable. In reality, creating a federated system of record with this approach may not even be possible.
2. With strong internal resources in the IT department, a business might opt for a **do-it-yourself approach**. For this approach, developers often make use of web services. Initially, this approach often seems less expensive. But maintaining and enhancing the integration becomes daunting and expensive when the IT team attempts to . . .
 - Sync attachments and data context
 - Keep the integration intact with new application upgrades
 - Develop a queuing mechanism that prevents data loss
 - Troubleshoot for missing data and broken integrations
 - Preserve development knowledge in light of turnover in the development staff
3. **Integration toolkits** are a way of buying the integration for a federated system of record rather than building it. Or so it seems. Although an integration toolkit solves many of the challenges of the previous two approaches, you still have to learn a proprietary language to create an integration. You still build the integration yourself, just from larger pieces.
4. The ultimate approach is **Perspectium**. Perspectium delivers integrated solutions for your federated system of record. That means that Perspectium takes responsibility for getting data from A to B. With nothing to write, assemble, or maintain by the customer, Perspectium delivers solutions that are complete from end to end. With 24/7 support and regular customer-success reviews, Perspectium ensures that your federated system of record is delivering the competitive value that your business needs.

How Organizations Succeed with a Federated System of Record

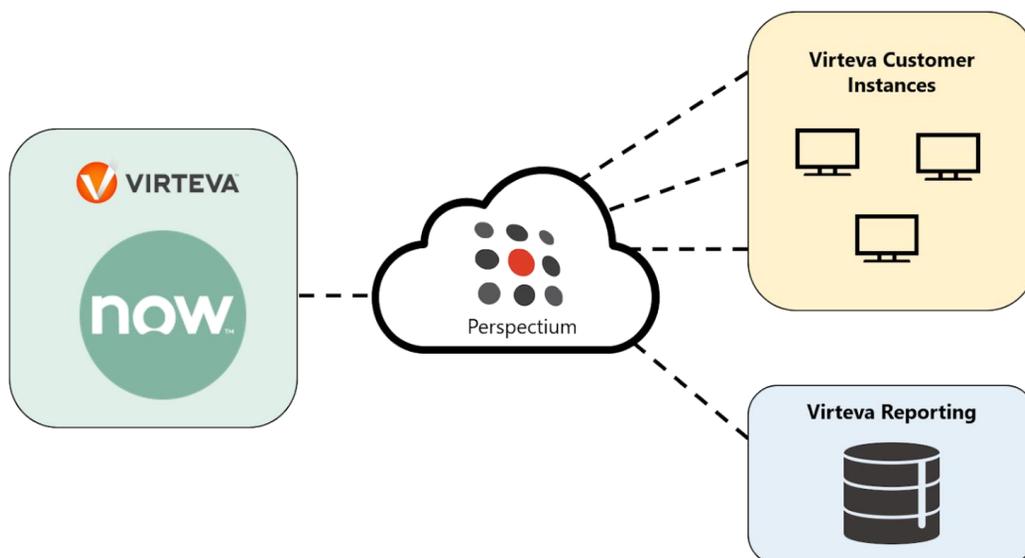
In what ways are companies maximizing their service management by operating with a federated system of record? The stories of Virteva and Palo Alto Networks offer two case studies.

Virteva is a managed service provider that was seeking “a single pane of glass” where they could monitor and control data related to their customers’ applications, including Salesforce and ServiceNow. Functioning as the service desk for multiple companies, Virteva receives up to 40,000 calls per month and needed to scale beyond the swivel-chair technology of moving between multiple ticketing systems.

Another driver for a federated system of record was Virteva's desire for unified reporting. “I needed one place that I can report on the entire volume of work that my team was executing and understand what was happening,” says Matt Miller, VP of Delivery. “I needed one consistent set of data that we were measuring against.” All of this consolidation needed to happen without crippling Virteva’s ITSM system.

Virteva achieved this federated system of record, the “single pane of glass,” by using Perspectium to integrate with customer instances and reporting tools.

Through their partnership, Virteva and Perspectium have created a federated system of record for incidents, CMDB and knowledge; lowered costs by providing a single place to work for their agents; increased security by not requiring multiple logins; and increased visibility with accurate and centralized reporting.



Palo Alto Networks, a leader in firewalls and other next-generation cybersecurity solutions, needed to improve the visibility of incident and enhancement requests from their users. Requests were submitted into ServiceNow, and information was then manually created in Atlassian Jira via “swivel chair” integration. Often, the ServiceNow request would be closed out while the issue/request was being managed in Jira, which meant users could not see their request status.

In addition, development teams needed a more accurate understanding of all demands being made on resources, relying on estimations without any consistent integration between their service management and development systems.

Using Perspectium, Palo Alto Networks created a federated system of record, enabling clear status visibility for users after they submit requests and throughout the request cycle. Customers no longer have to check status of their tickets in multiple tools, or search endlessly in their email. They also have an improved understanding of the development effort required to resolve the issues and changes being requested by the users, and can more accurately plan for resource allocation in the future.



How Important is Data Integrity to Your Business?

Your various systems of record can collect all the data in the world, but unless you have a way to keep that data in sync and readily available through a federated system of record, your business will be less efficient, less functional for customers and staff, and less competitive. With the right integration solution, you can create a reliable federated system of record for multi-departmental service management.

How much is your pursuit of a federated system of record costing you today?

You are spending a lot more on replication than you think. Our TCO calculator will figure out how much your integrations are costing you today—and tell you how much they could cost you with Perspectium. Try it out to [calculate your TCO](#) for a federated system of record.