

Requesting Software – How to provide a positive user experience while maintaining control

With SaaS products expected to soon overtake desktop installed software, what approach can be taken to balance a positive (and fast) user experience with financial, risk and compliance controls?



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Imagine the scenario... you've just joined a new project, and the project requires you to use new software. Are you clear on how to request that software? How long will it take to be installed (desktop based) / provisioned (web / SaaS based)? How much will it cost? Are there license implications? How will patches/upgrades be applied?

Hopefully the days of going to a shop (physical store or online), buying the software on your company credit card, and installing it on your device have long gone (although we do still occasionally see this!). However, requesting software can still be a painful experience, and one that presents a material financial risk to organisations.

Requesting software should be a clear and seamless activity to end users. In this article we explore the different types of software request and how you can provide a positive automated user experience while maintaining financial, security and compliance control.

Software Request Management is a subset of the Service Request Management Practice (one of the [four Practices](#) which are truly end user facing), with follow on activity performed via the backend (yet equally important) Software Asset Management Practice; an essential hand-in-glove partnership.

A prerequisite to providing an effective service is for software assets to be controlled centrally, usually via a Software Asset Management (SAM) team within the IT department. When this is in place, there are three key different types of Software Request:

“Standard” Software: – Software that an organisation makes available to colleagues to enable them to perform their duties effectively. This is split into two:

1. **Base Build** – software included as part of the build image of the user's device. Users do not need to request this software, as its pre-loaded onto the user's device.
2. **Additional** – software that is made available to colleagues to request. Ideally, this should be role based to ensure users have a clear view of the software they likely require to enable them to perform their specific role. We recommend making this software available to request within your Service Portal or Virtual Agent solution (alongside all the other products and services that colleagues can request from your IT department). This avoids the need for users to have to navigate the IT organisation / separate portals. Approval workflows can be added, although we recommend performing a thorough review to ensure only absolutely necessary approvers are employed, they know in what context they are approving (e.g. financial, information security, data protection, reducing risk of shadow IT growth, etc) and a target is agreed on the speed in which an approval/rejection decision will be provided. Fulfilment splits into two:

- **Desktop Installed Software** – Integrated with your Service Management tool, automation solutions can be used to ensure near instantaneous installation at the point the request has been approved.
- **Web Based / SaaS Software** – this is split into two:
 - **No License Required (no cost)** – no request is required in this scenario, and the user should be guided to access the

software via their web browser while ensuring all security and data protection policies are followed.

- **License Required** – (either per application, or to utilise an enterprise license) – Automation solutions can be used to provision a license to the user together with logon credentials.

Restricted Software – Standard software that already exists, but could be restricted to certain roles, individuals or countries. This list should be managed centrally and made available for users to view. A 'Request Restricted Software' Catalogue Item should be in place to enable users to request access to restricted software should they need to do so, prompting the user to provide a suitable business case. An appropriate approval workflow should be pre-defined.

New Software (sometimes called 'Non-Standard') – thousands of new software products are brought onto the market every day. To respond to market conditions, from time to time your organisation will no doubt benefit from harnessing the capabilities of new software. New software can be broken down into two types:

- **Single User** – when one (or a handful) of users would like to install new software either on a trial basis or fully. We recommend using a temporary and controlled local admin privileges tool to enable the user to self-install, prompting the user to confirm that procurement, security and compliance practices have been followed, and they will be responsible for maintaining the software with IT providing best endeavours support only.
- **Multi-User** – when the organisation would like to add a new 'Standard' software item to the Request Catalogue to enable colleagues to request

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and install. A 'Request New Software' Catalogue Item should be created with a suitable approval and fulfilment workflow attached.

In addition to the above, there are also less frequently used types of Software Request including requests to access prohibited software, requests to access software modules within an existing product suite, 'bulk' requests (requests for Standard software to be provided to multiple users), and requests for open-source software components that enable the organisation to build new applications.

All the above require suitable and clear guidance to be provided to users. This could simply be in the form of a Knowledge Article. More mature organisations may include this as an immersive conversation

flow in their Virtual Agents to step the user at point of need through the type of Software Request they need to raise.

Architected effectively, users should not need to be 'trained' on how to raise Software Requests, and they should receive a seamless and near instantaneous experience while appreciating that not all requests will be approved. In addition, fulfilment should not be labour intensive, and all activities should be linked back to surrounding practices such as Software Asset Management to ensure license compliance (utilisation vs entitlement), and effective asset lifecycle management, all with clear, regular and automated billing in place to enable behaviour driving chargeback to the consuming Business Units.

Organisations should continually refine their processes and leverage technology to streamline Software Request management and adapt to changing user requirements. With SaaS becoming the dominant type of software used, this refinement has become crucial to operating effectively.

If you require support with your Software Request Management or Software Asset Management Practices, we'd be happy to help.

Please send us an enquiry to contact@masonadvisory.com to discuss further.

If you want to find out more about our services, click [here](#).



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About Mason Advisory

Mason Advisory has offices in Manchester and London and employs over 100 staff, with plans to continue its expansion. We enable organisations to deliver value through digital & technology transformation, solving complex business challenges, and helping clients set strategy through the intelligent use of IT resources including architecture, cyber, operating model and organisational design, service management, and sourcing. We operate in sectors such as financial services and insurance, legal and law, government, health and social care, emergency services, retail, FMCG, transport, and not-for-profit.

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