

# The Total Economic Impact™ Of BMC Helix ITSM And BMC Helix Digital Workplace

Cost Savings And Business Benefits For Service  
Management Enabled By BMC Helix ITSM And BMC  
Helix Digital Workplace

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## Executive Summary

Service desks are critical for organizations to run smoothly, address employees' needs, and handle issues quickly to minimize business disruptions. BMC Helix ITSM and BMC Helix Digital Workplace provide tools to simplify and automate work, empower agents and employees, and provide visibility to IT organizations to reduce resolution times, improve business outcomes, and reduce administrative burdens on employees.

BMC Helix IT Service Management (ITSM) is a software-as-a-service (SaaS) solution that offers automation, change management capabilities, and knowledge management tools to support organizations' service management needs. BMC Helix Digital Workplace provides an end-user interface with service catalog, and BMC Helix ITSM and BMC Helix Digital Workplace allow organizations to consolidate service management tools and systems, improve business outcomes, and focus on continuous improvement instead of system administration.

BMC commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying BMC Helix ITSM and BMC Helix Digital Workplace.<sup>1</sup> The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of using BMC Helix ITSM and BMC Helix Digital Workplace within their organizations.

Reduction in service desk tickets due to self-service

**25%**



### KEY STATISTICS



Return on investment (ROI)

**127%**



Net present value (NPV)

**\$4.50M**

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed four representatives from organizations with experience using BMC Helix ITSM and BMC Helix Digital Workplace. For the purposes of this study, Forrester aggregated the interviewees' experiences and combined the results into a single [composite organization](#) that has 10,000 end users and 50 service desk agents.

Interviewees noted that prior to using BMC Helix ITSM and BMC Helix Digital Workplace, their organizations struggled with decentralized, disjointed tools for service desk management. The tools required significant time and effort to maintain, and they hindered the organizations' abilities to meet end-user needs and service-level agreements (SLAs).

After the investment in BMC Helix ITSM and BMC Helix Digital Workplace, the interviewees' organizations were able to consolidate tools, improve issue resolution times, and continue to innovate to

improve efficiencies and outcomes. Key results from the investment include significant time and cost savings for the organizations, their service desk agents, and their end users.

### KEY FINDINGS

**Quantified benefits.** Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Up to 25% of tickets deflected from the service desk due to end-user self-service.** Improved self-help options for end users through BMC Helix ITSM, BMC Helix Digital Workplace, and the knowledge base reduces the number of tickets the composite organization files, and this impact grows as content is added and optimized. For the composite organization, this benefit is worth more than \$1.2 million over three years.
- **Automations for common requests and issues that improve agent capacity by an additional 10% to 20%.** The composite organization identifies frequent, low-complexity issues, and it implements automations for requests such as password resets, software requisitions, and ticket routing. This reduces the burden on the service desk and, over time, the organization identifies and automates additional and more complex issues, which increases its request automation rate. For the composite organization, this benefit is worth \$653,300 over three years.
- **Up to 15% improvement in service desk agency efficiencies from improved tools and processes.** BMC Helix ITSM and BMC Helix Digital Workplace consolidate tickets and associated information that previously existed across the composite organization's disparate tools, and they provide structure for data entry, which ensures consistency and visibility for agents. Knowledge articles in the tool improve agents' abilities to quickly and effectively solve issues and provide more consistent outcomes.

For the composite organization, this benefit is worth \$528,200 over three years.

- **Productivity improvements for IT teams.** BMC Helix ITSM supports improved change management practices, auditing, and reporting for the composite organization, which leads to time savings worth \$28,700 over three years.
- **End-user time savings worth \$4.3 million over three years.** Self-service, structured data entry, automations, and reduced service interruptions lead to significant time savings for end users across the composite organization.
- **Legacy environment savings of \$1.3 million.** The composite organization retires on-prem servers and software, and it reduces the number of FTEs required to maintain and monitor systems, which reduces administrative overhead.

**Unquantified benefits and flexibility.** Benefits that provide value for the composite organization but are not quantified in this study include:

- **Improved end-user satisfaction.** Better visibility into issues and requests, less back-and-forth to get tickets resolved, and reduced impact from changes increases end users' satisfaction with IT and service-management teams.
- **Improved employee satisfaction.** Improving access to resources that allow service agents to do their jobs more efficiently and effectively reduces the administrative burden from on-prem systems and allows admins to focus on more complex development work. As a result, employees are more engaged and happier.
- **Additional business use cases.** Other parts of the business including facilities and contact centers can leverage BMC Helix ITSM and BMC Helix Digital Workplace's service management capabilities for knowledge management, service requests, and workflows. This can improve

business outcomes beyond standard IT service management teams.

**Costs.** Three-year, risk-adjusted PV costs for the composite organization include:

- **Subscription costs of \$2 million.** Subscription costs are based on the number and types of licenses and modules deployed.
- **Implementation and training costs of less than \$885,000.** The composite organization works with an implementation partner for its deployment. In addition, internal resources from service management, IT, and change teams spend 80% of their time for eight months on the deployment, and service desk agents are also trained on the system.
- **Ongoing management costs of \$673,000.** The composite organization's system administration efforts are relatively low at 0.5 FTEs. An additional one to two FTEs spend time on development work to build out additional automations, workflows, and other system capabilities.

The representative interviews and financial analysis found that a composite organization experiences benefits of \$8.04 million over three years versus costs of \$3.55 million, adding up to a net present value (NPV) of \$4.48 million and an ROI of 126%.



ROI  
**127%**

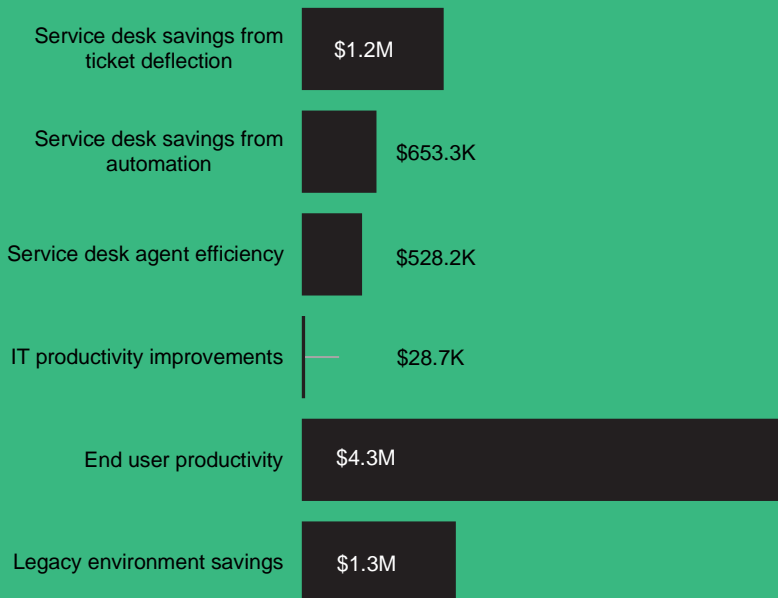


BENEFITS PV  
**\$8.06M**



NPV  
**\$4.50M**

### Benefits (Three-Year)



**“Having that visibility across the whole organization ... has definitely been a business benefit in terms of reducing the time spent by our customers searching for solutions and enabling us to be more proactive about fixing problems.”**

— Senior manager of enterprise technology, infrastructure



## TEI FRAMEWORK AND METHODOLOGY

From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in BMC Helix ITSM and BMC Helix Digital Workplace.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Helix can have on an organization.

### DISCLOSURES

Readers should be aware of the following:

This study is commissioned by BMC and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Helix.

BMC reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

BMC provided the customer names for the interviews but did not participate in the interviews.



### DUE DILIGENCE

Interviewed BMC stakeholders and Forrester analysts to gather data relative to BMC Helix ITSM and BMC Helix Digital Workplace.



### INTERVIEWS

Interviewed four representatives at organizations using BMC Helix ITSM and BMC Helix Digital Workplace to obtain data with respect to costs, benefits, and risks.



### COMPOSITE ORGANIZATION

Designed a composite organization based on characteristics of the interviewees' organizations.



### FINANCIAL MODEL FRAMEWORK

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.



### CASE STUDY

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

# The BMC Helix ITSM And BMC Helix Digital Workplace Customer Journey

■ Drivers leading to the BMC Helix ITSM And BMC Helix Digital Workplace investment

Interviews			
Role	Industry	Region	End users
Senior director of data services	IT services	Multinational	160,000
Director of IT service management	Financial services	US regional	2,200
Project manager	Technology	Multinational	200
Senior manager of enterprise technology	Infrastructure	North America	14,000

## KEY CHALLENGES

Prior to investing in BMC Helix ITSM and BMC Helix Digital Workplace, interviewees' organizations used a variety of homegrown and other on-prem tools that required significant manual effort for their service management needs. Because information was scattered across tools and because on-premises systems were clunky and lacked automation capabilities, service desk agents struggled to meet the needs of end users at their organizations.

The interviewees noted how their organizations struggled with common challenges, including:

- **Decentralized tools and information.** Prior to using BMC Helix ITSM and BMC Helix Digital Workplace, service management information was scattered across various spreadsheets, emails, and other disjointed in-house tools. When it came time to fulfill requests, service desk agents were tasked with sifting through various sources of information to collect all the details they needed to resolve an issue. In cases where information was missing, agents would have to spend additional time interfacing with end users to fill in the gaps before beginning to fulfill their requests. These extra steps resulted in unmet SLAs and significant backlogs. With high-priority IT issues, these delays also caused disruptions in end

users' workflows, which forced them to wait for their issues to be resolved before resuming their tasks.

- **Manual, error-prone processes.** The organizations' legacy systems lacked visibility, automations, or process controls. As a result, end users and service desk agents spent significant time entering information, correcting errors, and routing requests. A senior director of data services at an IT services company shared: "[My organization's previous tools had] a lot of freeform [fields], and we didn't have quality checks. So, a lot of mistakes were made and [there was] stuff left out."

A senior manager of enterprise technology at an infrastructure organization similarly noted that their company required a lot of rework due to errors.

- **On-premises and resource-intensive legacy solutions.** Interviewees revealed that it was time-consuming and costly to maintain, patch, and monitor their organizations' previous on-prem solutions. The solutions also required the efforts of resources who could have been otherwise focused on more valuable business needs. The senior director of data services at the IT organization explained: "We had our own



homegrown tool, and we needed to get off of it because the cost to keep [and] maintain it was not good. ... [The system was beginning to break, and] the total cost of ownership and [the costs of] managing [it] and keeping it up to date down the road is just too costly compared to what ... BMC can do.”

A director of IT service management at a financial services organization said the effort that went into maintaining their firm’s previous on-prem solution — including conducting server upgrades and testing disaster recovery every quarter — required multiple days and multiple resources to complete.

**“A big driver [for switching to BMC Helix ITSM was] to move us to being a cloud-first organization and to reduce the footprint in our data center.”**

*Senior manager of enterprise technology, infrastructure*

### SOLUTION REQUIREMENTS

The interviewees’ organizations searched for a solution that could:

- Allow them to consolidate systems and information to improve visibility for agents, end users, and the business.
- Automate work to improve efficiency for better service outcomes.
- Move to the cloud to reduce their administrative burdens and operational footprints.

### COMPOSITE ORGANIZATION

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the four interviewees, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

**Description of composite.** The composite organization supports 10,000 end users with 50 service desk agents. End users submit an average of one ticket per person per month. Tickets include service requests as well as incident reports. Service agents manage some tickets, while other tickets are triaged by agents and routed to the appropriate team. Prior to deploying BMC Helix ITSM and BMC Helix Digital Workplace, the composite organization used a combination of on-prem systems for service management, and requests came in through these systems as well as through phone calls, emails, and in person.

**Deployment characteristics.** The composite organization deploys BMC Helix ITSM and BMC Helix Digital Workplace and a knowledge base over the course of eight months. The composite organization’s use of BMC Helix ITSM and BMC Helix Digital Workplace continues to grow through development of new automations, knowledge articles, and use-case extensions to other parts of the business.

#### Key Assumptions

- **10,000 end users**
- **50 service desk agents**
- **12 tickets per end user submitted per year**

**Composite organization’s previous state before using Helix.** The following table lists key metrics for the composite organization that are used throughout this financial analysis.

<b>Composite Organization’s Previous State Before Using Helix</b>			
<b>Ref.</b>	<b>Metric</b>	<b>Source</b>	<b>Number or cost</b>
R1	End users supported by service desk	Interviews	10,000
R2	Annual tickets filed per end user before using BMC Helix ITSM and BMC Helix Digital Workplace	Interviews	12
R3	Total annual ticket volume before using BMC Helix ITSM and BMC Helix Digital Workplace	R1*R2	120,000
R4	Number of service desk agents before using BMC Helix ITSM and BMC Helix Digital Workplace	Interviews	50
R5	Annual tickets handled per agent before using BMC Helix ITSM and BMC Helix Digital Workplace	R3/R4	2,400
R6	Fully burdened annual salary of a service desk agent	TEI standard	\$59,000
R7	Fully burdened hourly salary of a service desk agent	TEI standard	\$28
R8	Fully burdened annual salary of a general office worker	TEI standard	\$87,000
R9	Fully burdened hourly salary of a general office worker	TEI standard	\$42
R10	Fully burdened annual salary of an IT worker	TEI standard	\$125,000
R11	Fully burdened hourly salary of an IT worker	TEI standard	\$60

# Analysis Of Benefits

■ Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Service desk savings from ticket deflection	\$265,500	\$584,100	\$690,300	\$1,539,900	\$1,242,724
Btr	Service desk savings from automation	\$200,600	\$250,750	\$351,050	\$802,400	\$653,344
Ctr	Service desk agent efficiency	\$212,400	\$212,400	\$212,400	\$637,200	\$528,207
Dtr	IT productivity improvements	\$11,526	\$11,526	\$11,526	\$34,578	\$28,663
Etr	End-user productivity	\$1,428,000	\$1,792,140	\$1,963,500	\$5,183,640	\$4,254,496
Ftr	Legacy environment savings	\$542,250	\$542,250	\$542,250	\$1,626,750	\$1,348,495
	Total benefits (risk-adjusted)	\$2,660,276	\$3,393,166	\$3,771,026	\$9,824,468	\$8,055,929

## SERVICE DESK SAVINGS FROM TICKET DEFLECTION

**Evidence and data.** Prior to implementing BMC Helix ITSM and BMC Helix Digital Workplace, end users at the interviewees' organizations lacked a consistent way to request support or to report problems to the service desk, and they didn't have good resources that would enable them to resolve issues themselves.

By funneling all service requests through the service catalog, interviewees' organizations were able to offer end users a menu of options including knowledge articles, chat bots, and self-help resources that allowed them to find the information they needed, fix issues themselves, or take appropriate actions to get their requests routed appropriately. As a result, end users submitted fewer tickets, and this reduced the burden on service desk agents.

- The senior director of data services in the IT services industry shared that their organization saw a 20% reduction in total tickets filed per

month after implementing BMC Helix ITSM and BMC Helix Digital Workplace because people could use the service catalog and handle issues in the moment rather than needing to file a ticket. The interviewee noted that over time, people became more self-sufficient at solving their own issues by leveraging new resources. They said: "[We] have the service catalog, we have the knowledge articles, [and] we have all those things [the] service desk can rely upon to redirect the users ... to a better path. ... You teach them to fish [and] then maybe they don't even call [the service desk] the next time."

- The director of IT service management in the financial services industry said their organization saw a 20% reduction in tickets due to self-service by leveraging the service catalog, knowledge base, and chatbot. They shared: "We've written [knowledge-base articles], so if someone is having problems connecting to certain things, we say, 'If you can't connect this way, [then] change this setting to this, and connect to our disaster recovery site for that.' And the instructions are

right in the knowledge management system. ... If people go into [our chatbot] and ask that question and get the answer, they can just self-service themselves right on the spot, which is much quicker and easier than waiting at the service desk.”

- The senior manager of enterprise technology in the infrastructure industry said their organization decreased its ticket volume between 25% and 40%. They explained that the service catalog drove down emails and calls because end users could now self-service.

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The organization deploys BMC Helix ITSM, BMC Helix Digital Workplace, and a knowledge base.
- During the first year, the organization spends additional time after deployment creating a robust library of knowledge articles and other self-help resources. Due to this additional effort, the scale of this benefit is lower in Year 1.
- By Year 2, the organization has a fully deployed knowledge base and self-help resources, and the benefit continues to grow as the organization adds and optimizes content.
- The reduction in ticket volume reduces the number of service desk agents required, and these agents are redeployed elsewhere in the organization.

**“[With] Digital Workplace, having that service catalog [drove] down the number of emails or phone calls because it was used to self-service.”**

*Senior manager of enterprise technology, infrastructure*

**Risks.** The benefit an organization may realize due to service desk savings from ticket deflection will vary due to a variety of factors, including:

- The level of self-help offerings available in the organization’s previous environment.
- The volume and complexity of tickets end users file and whether these requests can be self-served.
- The breadth, depth, and quality of created resources.
- Typical costs of support.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV of \$1.2 million.

Service Desk Savings From Ticket Deflection					
Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Tickets filed per year before using BMC Helix ITSM and BMC Helix Digital Workplace	R3	120,000	120,000	120,000
A2	Percent of tickets deflected by improved self-help offerings	Interviews	10%	22%	25%
A3	Total annual deflected tickets	A1*A2	12,000	26,400	30,000
A4	Annual tickets handled per agent before using BMC Helix ITSM and BMC Helix Digital Workplace	R5	2,400	2,400	2,400
A5	Reallocated service desk agents	A3/A4	5	11	13
A6	Fully burdened annual salary of a service desk agent	R6	\$59,000	\$59,000	\$59,000
At	Service desk savings from ticket deflection	A5*A6	\$295,000	\$649,000	\$767,000
	Risk adjustment	↓10%			
Atr	Service desk savings from ticket deflection (risk-adjusted)		\$265,500	\$584,100	\$690,300
<b>Three-year total: \$1,539,900</b>			<b>Three-year present value: \$1,242,724</b>		

### SERVICE DESK SAVINGS FROM AUTOMATION

**Evidence and data.** Although interviewees said that end users were often able to avoid filing tickets entirely due to new self-help resources, they said the requests end users did submit could be fulfilled through automations that would have previously required the support of a service agent.

The director of IT service management at the financial services organization said: “We looked at our incident tickets and said, ‘Okay, what’s our number one ticket and how can we start to automate this or allow the user to solution?’ The goal for these automations is either ... the call doesn’t even need to come in or ... the person can self-serve and do it instead.”

The senior manager of enterprise technology in the infrastructure industry explained: “[The improved visibility across all types of tickets provided by BMC Helix ITSM enabled my organization to look at duplicate or repeat requests and say,] ‘Hey, is there a

standard request we could put together here? Is this something we could automate?’”

Interviewees described types of common requests that their organizations were able to automate, including:

- Password resets.** The director of IT service management in the financial services industry described how their organization has been able to automate resolutions for common end-user requests. For example, they said end users previously would have to call the support desk to unlock a password. But they said, “[With automations created through BMC Helix ITSM and BMC Helix Digital Workplace,] ... your neighbor can go in there and unlock your password so you don’t have to call the service desk.” However, the interviewee noted their organization still logs a ticket for tracking purposes.

- **Standardized services.** The senior manager of enterprise technology in the infrastructure industry shared that with BMC Helix ITSM and BMC Helix Digital Workplace, their organization was able to almost entirely automate its new-employee onboarding process and that this reduced the total time of onboarding from several days to less than an hour and significantly reduced errors from manual processes. The organization also largely automated common service requests like hardware or software fulfillment through integrations and workflows, which reduced total delivery time by 60% to 70%.
- **Ticket routing.** Other types of automation reduced the burden on service desk agents as well. Multiple interviewees said their organization implemented automations to route tickets straight to appropriate support groups whereas, previously, the service desk would have triaged these requests. Interviewees estimated these types of automations deflected upwards of 20% of tickets away from their organizations' service desks, which saved several minutes per ticket.

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The composite's automation rate increases from years 1 to 3 as the organization continues to identify and implement automation opportunities.

- Ticket automations effectively increase the capacity of service desk agents by reducing the amount of work required for a total volume of tickets.
- The additional capacity created through automations reduces the number of service desk agents required, and those agents are reallocated elsewhere in the organization.

**Risks.** The benefit an organization realizes due to automations may vary due to a variety of factors, including:

- The number and types of automations that exist in the organization's previous environment.
- The volume, types, and complexity of tickets submitted to the service desk and whether these tickets can be automated.
- The number, quality, and complexity of automations the organization creates using BMC Helix ITSM and BMC Helix Digital Workplace.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV of \$653,300.



Service Desk Savings From Automation					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Ticket volume after deflection	A1-A3	108,000	93,600	90,000
B2	Annual tickets handled per agent before using BMC Helix ITSM and BMC Helix Digital Workplace	R5	2,400	2,400	2,400
B3	Agents needed to handle remaining tickets	B1/B2	45	39	38
B4	Percent of remaining tickets fully automated	Interviews	10%	15%	20%
B5	Annual tickets handled per agent with automation using BMC Helix ITSM and BMC Helix Digital Workplace	B2*(1+B4)	2,640	2,760	2,880
B6	Agents needed to handle remaining tickets with automation	B1/B5	41	34	31
B7	Reallocated service desk agents	B3-B6	4	5	7
B8	Fully burdened average salary of a service desk agent	R6	\$59,000	\$59,000	\$59,000
Bt	Service desk savings from automation	B7*B8	\$236,000	\$295,000	\$413,000
	Risk adjustment	↓15%			
Btr	Service desk savings from automation (risk-adjusted)		\$200,600	\$250,750	\$351,050
<b>Three-year total: \$802,400</b>			<b>Three-year present value: \$653,344</b>		

### SERVICE DESK AGENT EFFICIENCY

**Evidence and data.** Interviewees shared that BMC Helix ITSM and BMC Helix Digital Workplace improved service desk agents’ abilities to resolve tickets quickly and effectively. In their organizations’ previous environments, tickets existed across multiple systems and were filed in different formats — often with missing or incorrect information. As a result, agents didn’t have visibility to the full queue or related issues, and there weren’t good knowledge repositories for agents to reference.

With BMC Helix ITSM and BMC Helix Digital Workplace, the organizations consolidated their tickets into a single system, and agents could see related tickets and reference knowledge articles, which improved their ability to solve problems quickly and without escalation. Information in the tickets was also more consistent and complete, which reduced the need for follow-ups with end users.

The reduced context-switching and improved visibility allowed faster resolution times and better outcomes, which improved agents’ overall productivity.

- A project manager in the technology industry described how having everything in one system improved efficiency for their organization’s service desk. They said, “[With our previous tool, the service desk] needed to collect all the information by mail or [by] calling or finding files in some places or something like that. ... [With BMC Helix ITSM and BMC Helix Digital Workplace,] if you open a request from, for example, [BMC Helix Business Workflows], you have all the information in the same screen, all the comments for the users and from the users, [and] all the files attached to the request. So, the benefit for my users ... [is] time and more efficiency.”

The interviewee said that in the event that

additional information is needed, service desk agents are able to communicate through the same tool, which reduces the time and effort needed to complete work.

- The senior director of data services in the IT services industry described how BMC Helix ITSM and BMC Helix Digital Workplace helped their organization structure incoming support requests, which improved agents' abilities to resolve issues and improved the firm's first-call resolution rate by 5% to 10%. The interviewee said: "By going to a tool [like BMC Helix ITSM and BMC Helix Digital Workplace], it structures [the support request]. It says, 'You've got to fill in these five things. I need these five things to help solve your problem.' ... [It] either [gives] you a service that you're requesting or [helps you] understand the incident and what's really broken. And that's what's helped a lot. Before, our older tool didn't have that structure per se."
- Similarly, the senior manager of enterprise technology in the infrastructure industry explained how better, more structured information impacted their organization's service delivery. They said: "[BMC Helix ITSM and BMC Helix Digital Workplace offer] better consistency of the tracking and recording of incidents and service requests [than other solutions do]. [Having] a consistent format [and] capturing the right information from the users of the time saves a lot of rework [and] effort. [We are now] able to properly categorize, filter, and assign service requests, incidents by application or by category, or some other metadata that [previously] wasn't available using the kind of unstructured method like email or spreadsheets. Those were the sort of obvious benefits [of] getting everybody on the same system [and] looking at the single source of truth."
- The director of IT service management in the financial services industry explained how

improved knowledge management improved their organization's resolution times and agent efficiency. They said: "So, agent A goes in [and] writes a knowledge document for their team and, when this type of ticket comes in, then agent B is able to do it faster and better and standardized the way that they're doing the work, and it does remove risk and everything else."

- The interviewee said 40% of their organization's tickets are now solved by leveraging the knowledge management tools.

**“Having [a] centralized place where any type of service request, whether it be an incident to fix a problem or request for new hardware ... and having that come through and capture the right information up front, being able to use input validations, being able to customize the fields to capture the right information, and then using the workflow to make sure it's being approved by the right people has been enormously valuable.”**

*Senior manager of enterprise technology, infrastructure*

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The composite's agent efficiency improves by 10% in Year 1 due to consolidated information, better data entry, and a robust knowledge management system.

- As historic data and knowledge articles continue to expand, agent efficiency increases to 15% by Year 3.
- The additional agent capacity reduces the number of agents required to manage the volume of tickets, so agents are redeployed elsewhere in the organization.

**Risks.** The benefit an organization may realize due to service desk agent efficiency will vary due to a variety of factors, including:

- The organization’s previous environment, including how many tools and systems it used for ticket management, how complicated it was to

navigate, and what visibility to other tickets it afforded.

- The previous environment’s ticket-submission processes and systems.
- The prior existence of knowledge articles for service desk agents and to what extent those are built out using BMC Helix ITSM and BMC Helix Digital Workplace.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV of \$528,200.

<b>Service Desk Agent Efficiency</b>					
Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Ticket volume after deflection	B1	108,000	93,600	90,000
C2	Annual tickets handled per agent with automation using BMC Helix ITSM and BMC Helix Digital Workplace	B5	2,640	2,760	2,880
C3	Agents needed to handle remaining tickets with automation	B6	41	34	31
C4	Percent increase in productivity for remaining tickets	Interviews	10%	12%	15%
C5	Annual tickets handled per agent with automation and improved productivity	C2*(1+C4)	2,904	3,091	3,312
C6	Agents needed to handle remaining tickets with automation and productivity	C1/C5	37	30	27
C7	Reallocated service desk agents	C3-C6	4	4	4
C8	Fully burdened annual salary of a service desk agent	R6	\$59,000	\$59,000	\$59,000
Ct	Service desk agent efficiency	C7*C8	\$236,000	\$236,000	\$236,000
	Risk adjustment	↓10%			
Ctr	Service desk agent efficiency (risk-adjusted)		\$212,400	\$212,400	\$212,400
<b>Three-year total: \$637,200</b>			<b>Three-year present value: \$528,207</b>		

## IT PRODUCTIVITY IMPROVEMENTS

**Evidence and data.** Interviewees said BMC Helix ITSM offered additional benefits to IT departments at their organizations. By consolidating information, improving visibility, and standardizing processes, IT teams saw the following benefits:

Reduction in IT time spent remediating change-related incidents

**80%**



- **Change-management improvements.** The senior manager of enterprise technology in the infrastructure industry said their organization previously didn't have a formal change-management process. Application owners would push through changes that might cause outages or unexpected behavior, and this impacted trust between teams. The interviewee explained, "[Before using BMC Helix ITSM,] change was done very informally, [and] there was a very fast and new strategy towards changes which would result in unexpected downtime [and] user dissatisfaction."

IT staff spent hours each week remediating issues caused by poorly coordinated changes. But the interviewee said, "[With BMC Helix ITSM,] ...we have much better visibility across different functional teams. ... [Having that visibility allowed my organization to] halt conflicting or bad changes before they go into production ... [which resulted in] far fewer failed changes."

The interviewee explained that with BMC Helix ITSM, change requests must go through a formal review process. They said: "We can use the

validation and the workflow engine within [BMC Helix ITSM] to make sure all the right documentation, the backout plan, the communication plan, [and] all of that is captured up front."

The overall impact was an 80% reduction in negative outcomes from failed changes.

- **Auditing time savings.** Interviewees shared that their organizations saw improvements in their auditing processes and associated time savings as a result of implementing BMC Helix ITSM.

The director of IT service management at the financial services organization said: "[Previously,] every time [auditing employees] wanted [material], we had to go into whatever system it was [in] at the time. We had to print out all these PDFs, and then we had to collect them all [and] ... zip them all up and ... send them to audit. And that is so time-consuming for my people."

**"We're able to use [BMC Helix ITSM] to ... be the engine that drives our change advisory board meetings each week to enforce our deployment window, make sure that people are capturing all of the right information and documents for the changes, [and] look for conflicts. It just becomes the focal point around everything to do with change management."**

*Senior manager of enterprise technology, infrastructure*

## Reduction in IT time spent supporting audits

# 85%



The interviewee said BMC Helix ITSM allowed their organization to give its auditors access to relevant parts of the system. Content is linked together in the system so auditors can review investigations, causes, associated tasks, and any other related information they need to complete the audit without IT support, which saves hours of IT time.

Similarly, the senior manager of enterprise technology in the infrastructure industry shared that their organization has seen improvements in its auditing process. They said, “[We can show] how a request flowed, who approved it, [and] when it was approved, [and then] make sure there’s a proper segregation of duties. ... Simply being able to pull the statistics is enormous.”

The interviewee said this saves their organization 90% of the time it previously spent pulling together materials for auditing.

- **Better reporting.** The reporting capabilities with BMC Helix ITSM also provided time savings for IT teams at interviewees’ organizations. The senior manager of enterprise technology explained that previously, they would have to refer to spreadsheets and emails to gather data and statistics they’d need to justify hiring or making investments. They said it was very arduous, and that it previously would have taken hours or days to put together accurate reporting. But they said with BMC Helix ITSM, it’s instantaneous.

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The organization previously spent 8 to 10 hours per week remediating incidents caused by changes implemented by product and application owners.
- The number of failed changes and associated remediation time decreases by 80% after the composite implements BMC Helix ITSM and formalizes the change-management process.
- The organization’s IT team previously spent 40 hours per year supporting the auditing process by providing documentation and reports.
- The auditing team requires minimal support from the IT team after implementing BMC Helix ITSM, which reduces auditing demands on the IT team by 85%.
- The IT team creates quarterly reports for leadership, which takes several hours each time due to the manual work required.
- Using BMC Helix ITSM and BMC Helix Digital Workplace, the composite generates these reports instantaneously, which reduces IT time spent by 90%.
- The organization recaptures 50% of the time savings for other value-added work.

**Risks.** The benefit an organization may realize due to IT productivity improvements will vary due to a variety of factors, including:

- The organization’s previous change-management practices, the number of failed changes it experienced in its previous environment, and the level of adoption and rigor put into place around change management using BMC Helix ITSM.
- The types and level of auditing the organization conducts, the associated processes, and the level of involvement required from IT resources in the previous environment.

- The types and frequency of reporting in the organization’s previous environment and the types of reporting it chooses to build out using BMC Helix ITSM.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV of \$28,700.

IT Productivity Improvements					
Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Time spent remediating incidents due to changes (hours)	Composite	500	500	500
D2	Percent reduction in remediation time	Interviews	80%	80%	80%
D3	Time spent on auditing (hours)	Composite	40	40	40
D4	Percent reduction in auditing time	Interviews	85%	85%	85%
D5	Time spent on reporting (hours)	Composite	20	20	20
D6	Percent reduction in reporting time	Interviews	90%	90%	90%
D7	Productivity recapture	TEI standard	50%	50%	50%
D8	Average fully burdened salary for an IT ops worker or admin	R11	\$60	\$60	\$60
Dt	IT productivity improvements	$(D1 \cdot D2 + D3 \cdot D4 + D5 \cdot D6) \cdot D7 \cdot D8$	\$13,560	\$13,560	\$13,560
	Risk adjustment	↓15%			
Dtr	IT productivity improvements (risk-adjusted)		\$11,526	\$11,526	\$11,526
<b>Three-year total: \$34,578</b>			<b>Three-year present value: \$28,663</b>		

### END-USER PRODUCTIVITY

**Evidence and data.** Interviewees said the time savings and productivity improvements that benefit their organizations’ service desks and IT teams also benefit the end users on the other side of those tickets. Previously, end users spent time looking for resources, submitting tickets, and waiting for issues to be resolved. And that time added up to significant lost productivity for the organizations.

With BMC Helix ITSM and BMC Helix Digital Workplace, end users saved time through self-service, automations, and easier request processes and data entry through the service catalog. They spent less time on hold, going back and forth with the

service desk for clarifications, and waiting for issue resolution.

End users also benefitted from improvements to the change process because better communications and fewer outages from changes reduced lost productivity.

- The project manager in the technology industry shared that end users can enter tickets more quickly with Digital Workplace compared than with their organization’s previous system. They said: “Feedback from my users [is that] they type less. ... Most of the information [they need to fill in the form] is auto-populated [with BMC], so they are typing less than [they did with] the old tool.”



- The director of IT service management at the financial services organization said: “People waited forever at the service desk before. ... [Now,] we [have] it down to where we moved the majority of our contacts into the customer-facing portal and auto-routed them to the support groups. It’s a much better employee experience because the employee doesn’t have to talk to the service desk, not get the help they need, get the ticket escalated, and then have it sent to someone’s queue. ... That’s valuable time.”
- The senior manager of enterprise technology at the infrastructure organization described the impact of poorly controlled change-management processes on end users. They said: “[Sometimes] it could be ... total loss of access in the worst-case scenario. Other times, it could just be dissatisfaction because something [was] changed without them being notified.”

After implementing BMC Helix ITSM, the organization experienced significantly fewer failed changes, which reduced lost productivity for end users. Users were also better informed about upcoming changes so they could plan accordingly. The interviewee said, “Our service desk is much better equipped to know what changes are coming up, when they’re coming up, when to expect disruption, [and] how to advise users.”

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- End users submit an average of one ticket per person per month.
- While each ticket varies in complexity and resolution time, end users save an average of 0.50 hours per instance in Year 1 between data entry and waiting to talk to the service desk, following up for additional information, and losing productivity while waiting for a resolution.

**“[With BMC Helix ITSM and BMC Helix Digital Workplace, end users] are able to go into our portal ... [and] possibly get an answer in the knowledge management system [or] self-service. Or, if they can’t, then they log a ticket and it goes right to the support group and the support group can handle it faster.”**

*Director of IT services, financial services*

- The time saved per instance increases to 0.75 hours by Year 3 as service desk efficiencies improve.
- End users save an additional 2 hours per year in lost productivity due to disruptions caused by failed changes, whether from full outages or other productivity losses due to poorly communicated changes.
- The average fully burdened hourly salary for an office worker is \$42.
- The organization recaptures 50% of the time savings for other value-added work.

**Risks.** The benefit an organization may realize due to end-user productivity will vary due to a variety of factors, including:

- The efficiency of the organization’s previous service management system, including its existing self-help resources, the complexity of the request process, and average resolution times.

- The depth, breadth, and quality of resources created for self-help and automations and to support service desk agents in resolving tickets.
- The improvement in change-management processes to reduce negative impacts of changes on end users.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV of \$4.3 million.

### End-User Productivity

Ref.	Metric	Source	Year 1	Year 2	Year 3
E1	End users supported by service desk	R1	10,000	10,000	10,000
E2	Times a user needs support annually	R2	12	12	12
E3	User labor time saved per instance (hours)	Interviews	0.50	0.67	0.75
E4	User productivity saved due to fewer service disruptions and outages (hours)	Interviews	2	2	2
E5	Fully burdened hourly salary of a general office worker	TEI standard	\$42	\$42	\$42
E6	Productivity recapture	TEI standard	50%	50%	50%
Et	End-user productivity	$E1*(E2*E3+E4)*E5*E6$	\$1,680,000	\$2,108,400	\$2,310,000
	Risk adjustment	↓15%			
Etr	End-user productivity (risk-adjusted)		\$1,428,000	\$1,792,140	\$1,963,500
<b>Three-year total: \$5,183,640</b>			<b>Three-year present value: \$4,254,496</b>		

### LEGACY ENVIRONMENT SAVINGS

**Evidence and data.** Interviewees’ organizations used a variety of solutions before implementing BMC Helix ITSM and BMC Helix Digital Workplace, but they each used at least some on-prem systems. Interviewees shared that reducing the financial and administrative burdens of these systems was one motivation for switching to Helix. Since BMC Helix ITSM and BMC Helix Digital Workplace are SaaS solutions, the organizations were able to retire the hardware and software associated with their previous solutions and significantly reduced the number of people required to administer them. The additional time savings allowed the organizations to redeploy resources for more valuable work.

- The director of IT service management in the financial services industry shared that their organization was able to return 35 servers and reduce its infrastructure support to less than one person by replacing its on-prem system with BMC Helix ITSM and BMC Helix Digital Workplace.
- The senior director of data services in the IT services industry said their organization’s infrastructure savings after retiring its previous solution was substantial and that the headcount requirement for system administration fell by at least 10%.
- The senior manager of enterprise technology in the infrastructure industry discussed the types of

savings BMC Helix ITSM and BMC Helix Digital Workplace provided their organization over its legacy solution. They said: “We don’t have to pay to run a server, database, storage, [and] backup ... and then [spend additional] time patching, maintaining, and monitoring the system. ... [Previously,] ... people would be involved in the backup, the install, [and] the testing ... to make sure that everything [was] working. All of that is now taken care of for us by BMC.”

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- After implementing BMC Helix ITSM and BMC Helix Digital Workplace, the composite fully retires servers, storage, and software systems from legacy solutions. The annual cost of those solutions was \$40,000 per year.
- The composite previously required five FTEs to manage the previous system. This work included performing updates, patches, maintenance, monitoring, and recovery testing.

- The composite requires 0.5 FTEs for basic system administration with BMC Helix ITSM and BMC Helix Digital Workplace. This allows it to redeploy 4.5 FTEs elsewhere in the organization.

**Risks.** The benefit an organization may realize due to legacy environment savings will vary due to a variety of factors, including:

- The organization’s previous systems and the amount and costs of hardware and software required to run them (whether the previous system was on-prem or cloud-based).
- The amount of administrative effort the organization required to administer its previous system and the salaries for employees who provided administration.
- The organization’s ability to retire or redeploy resources from its previous environment.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV of \$1.3 million.

Legacy Environment Savings					
Ref.	Metric	Source	Year 1	Year 2	Year 3
F1	Retired hardware and software	Composite	\$40,000	\$40,000	\$40,000
F2	IT FTEs required for system maintenance and testing	Composite	5	5	5
F3	Reduced labor required for system maintenance and testing	Interviews	90%	90%	90%
F4	IT FTEs reallocated	F2*F3	4.5	4.5	4.5
F5	Fully burdened annual salary of an IT worker	R10	\$125,000	\$125,000	\$125,000
Ft	Legacy environment savings	F1+F4*F5	\$602,500	\$602,500	\$602,500
	Risk adjustment	↓10%			
Ftr	Legacy environment savings (risk-adjusted)		\$542,250	\$542,250	\$542,250
<b>Three-year total: \$1,626,750</b>			<b>Three-year present value: \$1,348,495</b>		

## UNQUANTIFIED BENEFITS

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- **Improved end-user satisfaction.** Interviewees said that prior to using BMC Helix ITSM and BMC Helix Digital Workplace, end users spent time entering data, going back and forth with service desk agents to provide missing details, and lacked visibility into ticket statuses or upcoming changes and service interruptions. With BMC Helix ITSM and BMC Helix Digital Workplace, the service catalog makes it easier to request support, provide the right level of detail, and resolve requests more quickly. BMC Helix ITSM and BMC Helix Digital Workplace also provide end users with heightened visibility into updates for applications and other information that is typically only available to IT. By keeping end users in the know about the systems they rely on to do their work, they can anticipate potential tech issues and plan ahead. This alleviates the frustration of unexpected IT-related delays and allows end users to feel like they're part of the larger organizational ecosystem.
- **Improved employee satisfaction.** Interviewees said the multi-faceted nature of BMC Helix ITSM and BMC Helix Digital Workplace created greater capacity for self-service and subsequently reduced significant burden on service desk agents, which freed up their time for higher-value tasks. They also said moving to a SaaS solution has significantly reduced system administration, and that these shifts have made employees more satisfied with their roles because they are now able to make deeper contributions to the organization beyond addressing basic service requests and system administration.

The director of IT service management in the financial services industry said these kinds of changes have allowed their organization's

## Voice Of The Customer

**“I think [our end users] are happier. There’s nothing more frustrating [than when IT has] to come back to them multiple times to get [additional ticket] information. Whereas, now, [agents] have it [and] can start moving forward to get their issue resolved.”**

*Senior director of data services, IT services*

**“We’ve definitely had fewer complaints and [we’ve] definitely seen ... that users certainly seem to be happier by the fact that there’s much more predictably that they are informed about what’s going on. They get detailed information about upcoming changes to applications they may use, app windows are published in advance, and they’re much more informed and brought into the process than they ever were before.”**

*Senior manager of enterprise technology, infrastructure*

**“I know [our employees] love [BMC Helix ITSM and BMC Helix Digital Workplace], because now I’ve got multiple teams coming to me and saying, ‘What did you do for the call center? Can you do that for us, too? Can we get our own little space in Digital Workplace?’ ... We have multiple groups asking for it currently, and we’re going to deliver it.”**

*Director of IT service management, financial services*

employees to transition from support-technician roles to developer roles, which allows them to have greater involvement in creating efficiencies across the business. They shared: “The biggest impact is *growing* the [organization] instead of *running* the [organization]. [BMC Helix ITSM and BMC Helix Digital Workplace] have allowed us [to] free up our resources from becoming support technicians to being [BMC Helix ITSM] developers. Being developers, they’re much more in touch with moving us for not only IT, but [also for] businesses that use [BMC Helix ITSM and BMC Helix Digital Workplace] or trying to currently leverage the business workflows. ... It’s huge. I actually have happy employees.”

**“Having the capacity to develop rather than support has made just a huge difference in what we can now do.”**

*Director of IT service management, financial services*

### FLEXIBILITY

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement BMC Helix ITSM and BMC Helix Digital Workplace and later realize additional uses and business opportunities, including:

- **Extending business use cases.** Interviewees said that after their organizations reaped the value of BMC Helix ITSM and BMC Helix Digital Workplace in initial use cases, they want to replicate this success in other areas of the business to unlock similar value. They said the customizability of the solution allows departments with specific needs to adapt the platform to create efficiencies where they see fit. In addition to extending to other departments, interviewees’

organizations are also implementing the tool in offices in different regions to streamline processes and to leverage the automation capabilities more uniformly across their businesses.

The director of IT service management in the financial services industry shared that their organization’s call center began using Digital Workplace and the knowledge base to consolidate its documentation and standard operating procedures, and that the facilities team started using the tool for service-request management through Digital Workplace. The project manager at the technology organization expressed: “We have plans to extend [BMC Helix ITSM and BMC Helix Digital Workplace] functionalities to other departments. For example, sales [and] other departments will need different workflows and different customizations in the background. We [also plan to] extend the tool in the other countries.”

- **Future efficiencies.** Interviewees said BMC Helix ITSM and BMC Helix Digital Workplace improved visibility across a wide range of data, systems, and services. Interviewees shared that as their organizations’ use of the tools deepened, they started exploring new ways to improve their business services.

The director of IT service management in the financial services industry explained that capacity management is a new roadmap item for their organization in using BMC Helix ITSM and BMC Helix Digital Workplace. They said: “We’re working on getting all of our teams to correctly leverage their affected services and how they correlate to business services. ... Once we’re done with that, we will be able to effectively say we’ve gone from this affected service time to this reduction in time or [to] this increase in time.”

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Appendix A](#)).

# Analysis Of Costs

■ Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Gtr	Subscription	\$0	\$802,200	\$802,200	\$802,200	\$2,406,600	\$1,994,953
Htr	Implementation and training	\$882,517	\$1,016	\$801	\$708	\$885,042	\$884,635
Itr	Administration	\$0	\$206,250	\$275,000	\$343,750	\$825,000	\$673,037
	Total costs (risk-adjusted)	\$882,517	\$1,009,466	\$1,078,001	\$1,146,658	\$4,116,642	\$3,552,625

## SUBSCRIPTION

**Evidence and data.** Subscription costs for BMC Helix ITSM and BMC Helix Digital Workplace are based on the number of named and concurrent licenses as well as the modules deployed.

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The composite deploys BMC Helix ITSM, BMC Helix Digital Workplace, and the knowledge base to 50 service desk agents and 10,000 end users.
- Pricing may vary. Contact BMC for additional details.

**Risks.** Subscription costs may vary depending on a variety of factors, including:

- The number and types of licenses the organization purchases.
- The number and types of modules the organization deploys.
- Potential future changes to pricing, capabilities, or packaging.

**Results.** To account for these risks, Forrester adjusted this cost upward by 5%, yielding a three-year, risk-adjusted total PV of \$2 million.

Subscription						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	Subscription costs	Composite	\$0	\$764,000	\$764,000	\$764,000
Gt	Subscription	G1	\$0	\$764,000	\$764,000	\$764,000
	Risk adjustment	↑5%				
Gtr	Subscription (risk-adjusted)		\$0	\$802,200	\$802,200	\$802,200
<b>Three-year total: \$2,406,600</b>			<b>Three-year present value: \$1,994,953</b>			



## IMPLEMENTATION AND TRAINING

**Evidence and data.** Interviewees' organizations started their BMC Helix ITSM and BMC Helix Digital Workplace deployments with different legacy systems and tools and different maturity levels, so their implementation timelines and costs varied. In general, the organizations worked implementation partners (either BMC or a third-party partner). Internal resources at the organizations spent time gathering requirements, field-mapping processes, writing new processes and policies, working on integrations, testing, and training.

- The senior director of data services in the IT services industry shared that their organization worked with an implementation partner and that the internal project team consisted of process consultants, a project manager, testers, and business analysts. The implementation process included database setup and data transfer, as well as creating new knowledge articles. The last part of the implementation process was conducting systems training for the IT team. Training for the service management team was roughly 4 hours long.
- The director of IT service management in the financial services industry said their organization's implementation process was somewhat complex because it combined multiple on-prem systems. The internal team included representatives from the different legacy systems and the change team, and they dedicated 60% to 80% of their time to the implementation process. They spent time on data migration, mapping, and testing. The implementation partner provided training for the system, and additional training for the service management team took a couple of hours.
- The senior manager of enterprise technology in the infrastructure industry said that integrating with other applications and databases was the

biggest focus for their organization's team, along with performing testing and validation.

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- The composite organization previously used multiple on-prem systems for service management.
- The composite deploys BMC Helix ITSM, BMC Helix Digital Workplace, and the knowledge management system.
- The organization hires BMC professional services to support the implementation.
- Team members from multiple legacy systems as well as additional staff from IT and change-management teams support the implementation process. In total, 10 internal resources spend 80% of their time for eight months on implementation.
- 50 service desk agents undergo 4 hours of training as part of the implementation.
- Each year, service desk agents undergo an additional hour of refresher training. The number of agents decreases from Year 1 to Year 3 as they are deployed to other parts of the business due to gained efficiencies.

**Risks.** The costs an organization may experience due to implementation and training will vary due to a variety of factors, including:

- The complexity of the organization's previous environment, including the number of systems involved and the amount and types of data being migrated.
- The complexity of the organization's BMC Helix ITSM and BMC Helix Digital Workplace deployment, which includes the modules deployed, number of integrations, and any customizations.

- Whether the organization uses an implementation partner and which one it selects.
- The organization’s maturity level, preparedness, and change-management practices.

**Results.** To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV of \$885,000.

Implementation And Training						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
H1	Internal FTEs dedicated to implementation	Composite	10	0	0	0
H2	Time spent on implementation (months)	Interviews	8	0	0	0
H3	Percent of time dedicated to implementation	Interviews	80%	0%	0%	0%
H4	Fully burdened monthly salary of an IT worker	R10/12	\$10,417	\$0	\$0	\$0
H5	Professional services fee	Composite	\$130,000	\$0	\$0	\$0
H6	Service desk agents	R4	50	33	26	23
H7	Training time (hours)	Interviews	4	1	1	1
H8	Fully burdened hourly salary of a service desk agent	R7	\$28	\$28	\$28	\$28
Ht	Implementation and training	H1*H2*H3*H4+H5+H6*H7*H8	\$802,288	\$924	\$728	\$644
	Risk adjustment	↑10%				
Htr	Implementation and training (risk-adjusted)		\$882,517	\$1,016	\$801	\$708
<b>Three-year total: \$885,042</b>			<b>Three-year present value: \$884,635</b>			

**ADMINISTRATION**

**Evidence and data.** Interviewees said that once their organizations deployed BMC Helix ITSM and BMC Helix Digital Workplace, the system required minimal ongoing management. Administrators spend some time ensuring system updates go through properly, checking integrations, resolving user issues, and managing the service catalog. However, interviewees said the overall level of effort is significantly less than with their organizations’ previous on-prem environments. The firms dedicate additional resources to development work (e.g., creating processes and workflows, developing new automations, expanding the knowledge management system, and building out capabilities).

- The project manager in the technology industry shared that their organization has one administrator and one developer for BMC Helix ITSM and BMC Helix Digital Workplace.
- The director of IT service management in the financial services industry explained that their organization started with one administrator and that their work was primarily focused on development. As the organization expanded its use of Digital Workplace and added new workflows and automations, it hired a second developer.
- The senior director of data services at the IT services organization said half the team dedicated to supporting BMC Helix ITSM and

BMC Helix Digital Workplace manages the tools and the other half is focused on development and testing.

- The senior manager of enterprise technology in the infrastructure industry said, “[My organization’s full-time administrator spent] probably 50% [to 60%] of his time ... maintaining the system and maybe 40% ... working on enhancements and improvements.”

**Modeling and assumptions.** For the composite organization, Forrester assumes:

- One FTE spends 50% of their time on administrative support of BMC Helix ITSM and BMC Helix Digital Workplace.
- In Year 1, the composite dedicates one additional FTE to development work. This number

increases to two FTEs by Year 3 as additional workflows, automations, and processes are added and as the organization’s use of the system expands.

**Risks.** The costs an organization may experience from administration will vary due to a variety of factors, including:

- The size and complexity of the organization and its deployment of BMC Helix ITSM and BMC Helix Digital Workplace.
- The number and complexity of the organization’s automations, workflows, and deployed development work projects.

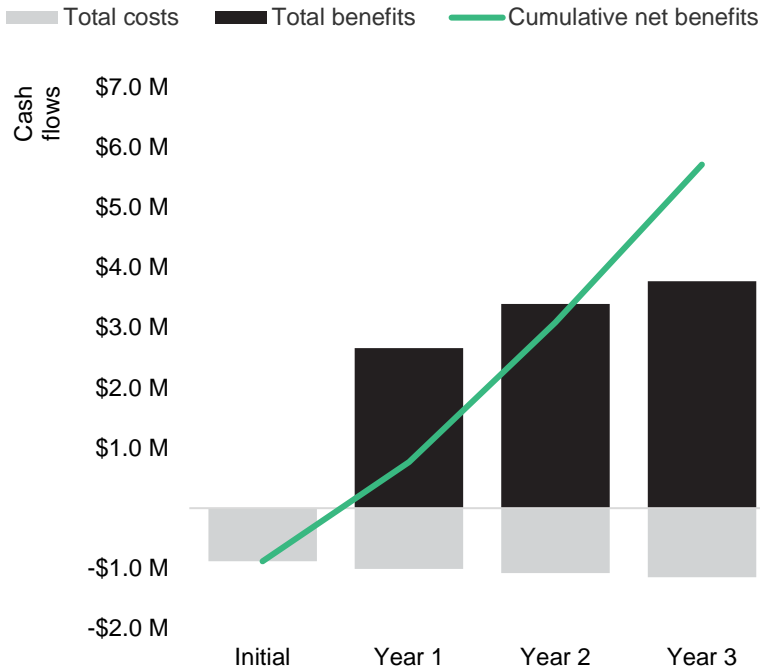
**Results.** To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV of \$673,000.

Administration						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
I1	System administration FTEs	Composite	0	0.5	0.5	0.5
I2	Capability enhancement FTEs	Composite	0	1.0	1.5	2.0
I3	Fully burdened annual salary of an IT worker	R10	\$0	\$125,000	\$125,000	\$125,000
It	Administration	I3*(I1+I2)	\$0	\$187,500	\$250,000	\$312,500
	Risk adjustment	↑10%				
Itr	Administration (risk-adjusted)		\$0	\$206,250	\$275,000	\$343,750
<b>Three-year total: \$825,000</b>			<b>Three-year present value: \$673,037</b>			

# Financial Summary

## CONSOLIDATED THREE-YEAR RISK-ADJUSTED METRICS

### Cash Flow Chart (Risk-Adjusted)



The financial results calculated in the Benefits and Costs sections can be used to determine the ROI and NPV for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI and NPV values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

### Cash Flow Analysis (Risk-Adjusted Estimates)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$882,517)	(\$1,009,466)	(\$1,078,001)	(\$1,146,658)	(\$4,116,642)	(\$3,552,625)
Total benefits	\$0	\$2,660,276	\$3,393,166	\$3,771,026	\$9,824,468	\$8,055,929
Net benefits	(\$882,517)	\$1,650,810	\$2,315,165	\$2,624,368	\$5,707,826	\$4,503,304
ROI						127%

## Appendix A: Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

### TOTAL ECONOMIC IMPACT APPROACH

**Benefits** represent the value delivered to the business by the product. The TEI methodology places equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization.

**Costs** consider all expenses necessary to deliver the proposed value, or benefits, of the product. The cost category within TEI captures incremental costs over the existing environment for ongoing costs associated with the solution.

**Flexibility** represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. Having the ability to capture that benefit has a PV that can be estimated.

**Risks** measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.



### PRESENT VALUE (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.



### NET PRESENT VALUE (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.



### RETURN ON INVESTMENT (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.



### DISCOUNT RATE

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

## Appendix B: Supplemental Material

### *Related Forrester Research*

“The Total Economic Impact™ Of BMC Helix,” a commissioned study conducted by Forrester Consulting on behalf of BMC, January 2021

“The Total Economic Impact™ Of BMC Helix With BMC Helix ITSM, BMC Helix Digital Workplace, And BMC Helix Chatbot,” a commissioned study conducted by Forrester Consulting on behalf of BMC, January 2019

“The Total Economic Impact™ Of BMC Remedy-As-A-Service,” a commissioned study conducted by Forrester Consulting on behalf of BMC, April 2018

## Appendix C: Endnotes

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<sup>1</sup> Total Economic Impact is a methodology developed by Forrester Research that enhances a company’s technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

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