EMA IT & DATA MANAGEMENT RESEARCH, INDUSTRY ANALYSIS & CONSULTING

EMA CASE STUDY

SUMMITAI

A world-class brand's evaluation path that led from 13 strong possibilities to selection of SummitAI's AI-powered ITSM and ITAM

EMA recently spoke at length with the head of IT operations about the challenges of finding a single enterprise-wide ITSM and asset management platform solution to serve a diverse variety of businesses. The company is a privately held, world-class entertainment and leisure company with high brand recognition. It owns/operates many varied restaurants, hotels, and entertainment venues. Each entity or division has unique business challenges, opportunities, and contexts combining the freedom to operate independently with the benefits of scale that come from some centralized services.

IT is one of those centralized services. Brian is the head of IT operations, which includes responsibility for the service desk, ITSM, and all level 2 support. He spear-headed the process of consolidating requirements across the diverse business entities and translating them into a system that would serve and satisfy – possibly even delight – all shareholders. This paper follows the path and reasoning that led Brian and his team from a starting field of 13 vendors to selection of SummitAI. The implementation is still young, but early results are quantifiably strong.

Context

There is a seasonal element to the business from Memorial Day through Labor Day, when the employee ranks swell from 1,500 permanent full-time folks to an additional 5,000 seasonal employees. IT handles the diversity of business requirements and HR load by standardizing wherever possible – where the standardization does not compromise the quality and type of service each business division needs. For instance, dining venues all use the same food and beverage system though the type of experience may vary greatly, from food stand to elegant fine dining. The divisions share the same HR systems and all are served by the same help desk and IT service management (ITSM) system.

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A distinctive of this company is its core mission of funding a charitable foundation that supports underserved families in meaningful ways across years and streams of need. This underlying value has an impact on the culture. Collaboration and cooperation are expected and delivered. It is not unusual to find an executive manning a food booth if needed. As a result, the work environment is one characterized by low turnover. The downside of that benefit is that younger professionals must sometimes leave the company to gain managerial experience before returning to long-term employment.

Such was the case of Brian, head of IT operations, who recently shared his experiences in a lengthy conversation with EMA. Brian first joined the company as a college intern, rising through the ranks for eight years until he left for several more years to manage end-user services at a major financial institution. He returned to the entertainment and leisure giant with firsthand experience in the selection and implementation of a new ITSM system. The experience also gave him an understanding that, "you can do a whole lot more with ITSM than enter a ticket and send it off to the next person in line."

The beginning

In his new incarnation at the company, Brian owned the service desk/help desk and level 2 talent. He inherited an ongoing Cherwell ITSM implementation. Was it perfect? "We had what we had, and we made it work." There was no compelling reason to look at other ITSM systems until Ivanti acquired Cherwell. From Brian's point of view, "the clock started ticking." He knew that sooner or later, Ivanti would twilight Cherwell and his company would have to make a change whether they wanted to or not.

Brian began helping his management, team, and peers get comfortable with the idea of change. "We'll have to change sometime. I want to get ahead of this." The company signed its annual Cherwell renewal on December 22nd each year. The signing in 2022 gave Brian and his team one year to evaluate and choose ITSM and ITAM systems that would take his company through the next generation of growth and change.

Brian and his team made a thoughtful list of what they needed and what they wanted in both an ITSM and an ITAM system. They were scored separately to find out who was on top for ITSM and who was on top for ITAM. However, vendors did get "extra points" for combining the two.

ITSM requirements: core system hosted/SaaS with very high uptime. Web browser only – no fat clients. Mobile app. Chatbot, Knowledgebase, self-service portal for user access and requests. Self-service automation and orchestration so standard requests could also be auto-fulfilled. "Asset could help us with these goals and dreams."

There were 26 categories in the ITSM RFP, including: incident management, tasks, ticketing, service requests, knowledge, change management, problem management, CMDB, service catalog, release management, portfolio management, portal, automation, orchestration, event management, emails, mobile app, chatbot, digital agent, surveys, and APIs. They also looked at core admin functionality and wanted a system that would give them room to grow.

Asset management requirements: core capabilities, agent on device, usage, but PoS PCI systems can't have an agent, hardware and software asset management, software deployment, OS deployment – Windows mostly, some Mac and Chrome, Raspberry Linux.

- **Vendors that received RFPs:** Atlassian/Jira, C2, EasyVista, Freshworks, Halo, IFS Assyst, Invgate, Ivanti neurons for ITSM, ManageEngine, ServiceNow, SummitAI, SysAid, and Team Dynamics.
- **Vendors that made the shortlist:** Fresh Service, Halo ITSM (working with a known partner, Excalibur), invgate, Ivanti neurons for ITSM because they were the incumbent, ServiceNow, and SummitAI.

Choosing

Each company did detailed demonstrations. "We'd ask a question and the sales people answering would say 'yes, we can do it.' And we'd say 'no, show us.' Some set up live demo environments – we recorded the demos and sent them to all IT people. Some cared. Some didn't. Some didn't and should have. Some don't use the capabilities as much as others. After, we sent a survey to everyone who attended a demo."

The company had a strong preexisting relationship with a partner that was selling and implementing one of the ITSM systems. The partner already knew the people, the organizations, and the nuances of the company, so that was attractive. In the end, SummitAI won. Brian noted that, to some extent, "All tools do the same thing. It comes down to how easy it is to use and admin…and cost."

SummitAI won on a number of fronts:

- Cost and value: SummitAI checked almost all of the boxes for now and in the foreseeable future at a cost that made a high value proposition.
- Ease of administration and configuration: "It's easy to make changes to configuration and presentation on the fly."
- Functionality: SummitAI had a rich set of features that were available now and "a roadmap that is exciting. There will be growth." It offers twelve ITIL ver-ified processes.
- Scope: SummitAI has one platform for ITSM, asset, workflow automation, and digital agents. It is easily extensible to other enterprise functions, such as HR and finance.
- Digital agent and chatbot
- Single tenant cloud-based SaaS
- Enterprise-grade platform for automation, orchestration, and AI: The company sees orchestration and automation as high priorities that SummitAI does well. It is interested in AI and appreciates SummitAI's dedication to harness-ing advances in that area, but it's not top of the wish list right now.
- Ease of implementation and time to value: Time to value was important. The company was on a tight timeline with its Cherwell license up for renewal, so it had to be done before Christmas.

Brian is very pleased with the decision and experience so far, but he had to be won over. "It was easy to get a high-level idea of the company. In all of the independent online review sites, such as Gartner Peer Insights, SummitAI (then known as Summit) was always in the high end of categories, recommendations, and satisfaction."

He added, "There was also the ITSM community at events like Support World. It's a chance to explore many options and learn from the firsthand experiences of peers. It is clear that what matters most is what works for your organization." Brian met the SummitAI sales team at Support World and extended the conversation over more than a year. The sales team is made up of experienced ITSM professionals who are knowledgeable, honest, competent, and helpful. They personalized demos and never exerted pressure to act.

Implementation and early results

From start to go-live was less than 90 days, with both organizations working around limitations of the client company. For instance, HR was implementing a new system and Brian didn't want to overwhelm them with change. ITAM launched in October 2023 and ITSM in late November. Service requests, change, knowledge, portal, and chatbot were the first priorities. Tickets were being entered well before the Christmas goal. It was a little slow at first as people made the change, but quickly adjusted.

About the implementation, Brian said, "SummitAI did most of the work. They gave us datasheets to fill out and we'd test it the next day. We met daily and tested daily. It was good out of the gate. From 'Tag, you're it' to go-live was just under three months. SummitAI could have easily done it faster if we'd wanted. The whole process was really low on drama."

Brian characterizes the implementation as early, saying, "We are babies on this path." At this writing, the implementation is less than six months in, and they are already seeing results:

- 42% of service requests that would have normally gone to the help desk are resolved with automation
- Onboarding seasonal employees/account creation is automated
- 58% of tickets were phone calls – now down to 48% with further reductions planned
- Portal use moved from 28% to 37%
- Digital assistant launch is soon, which will "make it so that agents aren't jumping from call to call to call…they can do more productive work"
- Analysis of call categories – seeing where time is spent and the reasons why – gives a basis for improving. Brian wants to cut down on the knee-jerk reaction to email. He wants people to stop emailing and go to the portal.
- CMDB is next

Brian says that working with SummitAI is good. Although he sometimes misses the in-depth, personalized knowledge a local partner brings to implementations, there are advantages to working directly with the company. He gets regular updates, can easily open tickets, and gets fast turnaround responses.

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Buoyed by the early successes, Brian and his team already have plans for growth. They plan to leverage the platform's ITSM/ESM capabilities to serve other functions, such as HR and finance. Experience teaches that, when people see what's possible with automation and AI, adoption climbs and use cases expand. The combination of practical fitness for today's needs with a ready ability to accommodate future requirements is a large win in SummitAI's favor.

A word from the SummitAI team

SummitAI, formerly SymphonyAI Enterprise IT, delivers AI-native service and operations for the enterprise. With deep domain knowledge, enterprise context, intelligent ontologies, workflows, and agentic AI, SummitAI understands how organizations operate and turns that intelligence into autonomous action. From service management and asset management to IT operations, security, and enterprise workflows, SummitAI helps organizations resolve more work with less human intervention.

SummitAI is recognized by leading industry analysts, including Gartner, Forrester, and IDC, for its innovation in AI-powered enterprise service and operations.

Learn more at https://summitai.com/

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