# Task 3: IT Workspace Requirements Workshop

This workshop is intended to gather business requirements for Incident and Service Request Management within the Freshservice IT Workspace module. The outcomes will guide the configuration phase, aligning system design with the organization's service delivery goals and ITIL best practices.

## Workshop Agenda

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| **Agenda Item** | **Owner** |
| Welcome and Introductions | All participants |
| Review Implementation Scope and SOW Elements | Engagement Manager |
| Walkthrough of Current-State Incident and Request Processes | Process Owner |
| Define Desired-State Process Outcomes | ITSM Sponsor |
| Capture Default Priority Matrix and SLAs | Project Manager |
| Identify Custom Forms, Fields, Statuses | System Admin |
| Review Categories, Subcategories, and Items | Process Owner |
| Discuss Automation Needs (e.g., Assignments, Notifications) | ITIL Advisor |
| Review Reporting Requirements and Metrics | ITSM Sponsor |
| Confirm Design Deliverables and Next Steps | All participants |

## Design Requirements Template

1. What is the Default Priority Matrix (e.g., Urgency × Impact)?

2. List required SLAs with applicable groups or request types.

3. What custom form fields are needed for Incidents and Requests?

4. What custom statuses (beyond Open, Pending, Resolved) should be configured?

5. Define the top-level categories, subcategories, and catalog items (if any).

6. Are there canned responses, form templates, or automation scenarios to capture?

7. What are the supervisor rules or escalations to apply?

8. What reports or metrics are critical to include from day one?

9. Are there specific routing, approval, or assignment automation rules required?

10. Additional notes, constraints, or known challenges: