# Task 4 – Departmental Interview and Requirements Workshop Guide

# 1. Schedule Interviews or Workshops

• Invite department heads, key process owners, and frequent service users.

• Group similar departments (e.g., HR + Facilities) to increase efficiency.

• Use calendar holds and structured agendas to guide conversations.

# 2. Use a Requirements Workbook

Topics to address in each session:

• Ticket types and classifications (Incident, Service Request, Change, Problem)

• Approval flows and task dependencies

• Portal visibility needs by department

• Service Catalog wishlist items

• SLA and business hours expectations

• Asset and inventory tracking methods

• Reporting and dashboard needs

# 3. Look for Redesign Opportunities

• Ask what takes too long, what gets missed, and what’s overly manual.

• Identify opportunities to automate or simplify legacy processes.

# 4. Document as You Go

• Use shared sheets (e.g., Excel, Google Sheets) to collect notes.

• Review inputs live with participants and follow up for refinement.

# Tips for Success

• Show visuals of the Freshservice portal, ticket UI, and workflow builder.

• Ask: 'What’s the first thing you do when this happens?'

• Prioritize what's needed pre-Go-Live; backlog enhancements for Phase 2.

• Reference ITIL’s Service Catalog Management and Request Fulfillment best practices.