

Appendix K

Platform Support and Maintenance Plan

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Originally created during a ServiceNow transformation; generalized for any enterprise platform implementation.

Part of the LDEO Framework™ Execution Toolkit

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Appendix K: Platform Support and Maintenance Plan

A comprehensive support and maintenance strategy is essential for ensuring the long-term success of a platform implementation. This section outlines key strategies for ongoing support and system maintenance to maximize system performance, user adoption, and business value.

1. Establishing an Internal Support Structure

Defining clear support roles and responsibilities within the organization ensures efficient issue resolution and user satisfaction.

Key Actions:

1. Define support roles and responsibilities:

- Examples: System administrators, application owners, help desk teams.
- *Scenario:* Designating a dedicated platform administrator for system oversight.

2. Train internal teams to handle common requests:

- Conduct hands-on training for issue resolution and process troubleshooting.

3. Develop a tiered support model:

- Structure:
 - **Tier 1:** Basic user support (password resets, navigation assistance).
 - **Tier 2:** Technical issue resolution (workflow errors, reporting issues).
 - **Tier 3:** Advanced support and system enhancements.

Checklist for Internal Support Setup:

- Assign dedicated platform roles and responsibilities.
- Implement a knowledge base for common support issues.
- Establish escalation procedures and SLAs for different support levels.
- Conduct regular refresher training for support teams.

2. Leveraging External Support Options

Engaging external partners and platform-certified support services can provide specialized expertise and extended support coverage.

Key External Support Options:

1. Platform Official Support:

- Access to vendor support for critical system issues and product guidance.

2. Third-Party Managed Service Providers (MSPs):

- Pros: Specialized expertise, proactive monitoring, and cost efficiency.
- Cons: Dependency on external resources and potential delays in response times.

3. On-Demand Consulting Services:

- Utilize for system enhancements, performance tuning, and troubleshooting.

Checklist for External Support Engagement:

- Establish relationships with platform-certified partners.
- Define SLAs and response times for third-party support providers.
- Ensure external teams align with internal support processes.
- Review support agreements periodically for optimization.

3. Regular System Maintenance and Updates

Scheduled maintenance and proactive updates ensure optimal system performance and minimize downtime.

Maintenance Activities:

1. System Health Checks:

- Conduct periodic performance assessments and identify potential bottlenecks.
- Use platform's Health Scan tools to detect system inefficiencies.

2. Patch Management:

- Stay up to date with platform's release schedule for patches and enhancements.
- Automate updates where possible to minimize manual interventions.

3. Performance Tuning:

- Optimize workflows, queries, and scheduled jobs to improve efficiency.

- Leverage Platform's Performance Analytics for proactive issue detection.

Checklist for System Maintenance:

- Schedule regular system health checks and performance reviews.
- Apply security patches and feature updates in a timely manner.
- Monitor system logs to proactively detect issues.
- Optimize database performance and storage utilization.

4. User Support and Continuous Improvement

Ongoing support and training initiatives are critical to driving user adoption and addressing evolving business needs.

Key Focus Areas:

1. User Feedback Mechanisms:

- Implement periodic surveys to gather user feedback and identify pain points.
- Establish a feedback loop to prioritize feature requests and improvements.

2. Training and Enablement Programs:

- Offer ongoing training for end-users on new features and system changes.
- Utilize e-learning platforms and documentation for self-service learning.

3. Roadmap for Enhancements:

- Align system enhancements with business objectives and user requirements.
- Regularly update the platform roadmap to incorporate best practices.

Checklist for Continuous Improvement:

- Establish a user feedback mechanism for improvement tracking.
- Provide regular training updates to keep users informed.
- Prioritize enhancement requests based on business impact.
- Monitor user adoption rates and address gaps proactively.

5. Common Support and Maintenance Challenges

Support and maintenance are essential to sustaining your platform performance post-implementation. The following challenges and solutions highlight common obstacles and how to overcome them.

Slow issue resolution times

- Solution: Implement tiered support and escalation paths.

Inconsistent user training

- Solution: Offer ongoing and on-demand training sessions.

Lack of proactive system monitoring

- Solution: Automate alerts and regular system health checks.

Over-reliance on external vendors

- Solution: Build internal expertise while maintaining partnerships.

6. Future Trends in your Platform Support and Maintenance

Anticipating future developments ensures organizations stay ahead of evolving demands and emerging best practices.

- **AI-Powered Support Automation:**
 - Use AI-driven chatbots and virtual agents to resolve common issues instantly.
- **Predictive Maintenance:**
 - Leverage analytics to foresee system failures before they occur.
- **Self-Healing Systems:**
 - Platform's automation capabilities to proactively fix issues without manual intervention.
- **Personalized Training Modules:**
 - AI-driven learning platforms tailored to individual user roles.

7. Key Takeaways

1. **A well-defined support structure** ensures operational stability and efficiency.
2. **Proactive maintenance practices** prevent system issues and downtime.
3. **User engagement and training** drive long-term system adoption and success.

4. **Leveraging a combination of internal and external support** optimizes resource utilization.

Conclusion

A disciplined support and maintenance strategy ensures that your platform continues to deliver value long after the initial rollout. By combining proactive monitoring, structured governance, and ongoing training, organizations can sustain performance and minimize disruption. Treating support as a strategic capability—rather than a reactive function—positions the platform to evolve with business needs and remain a core enabler of long-term success.

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