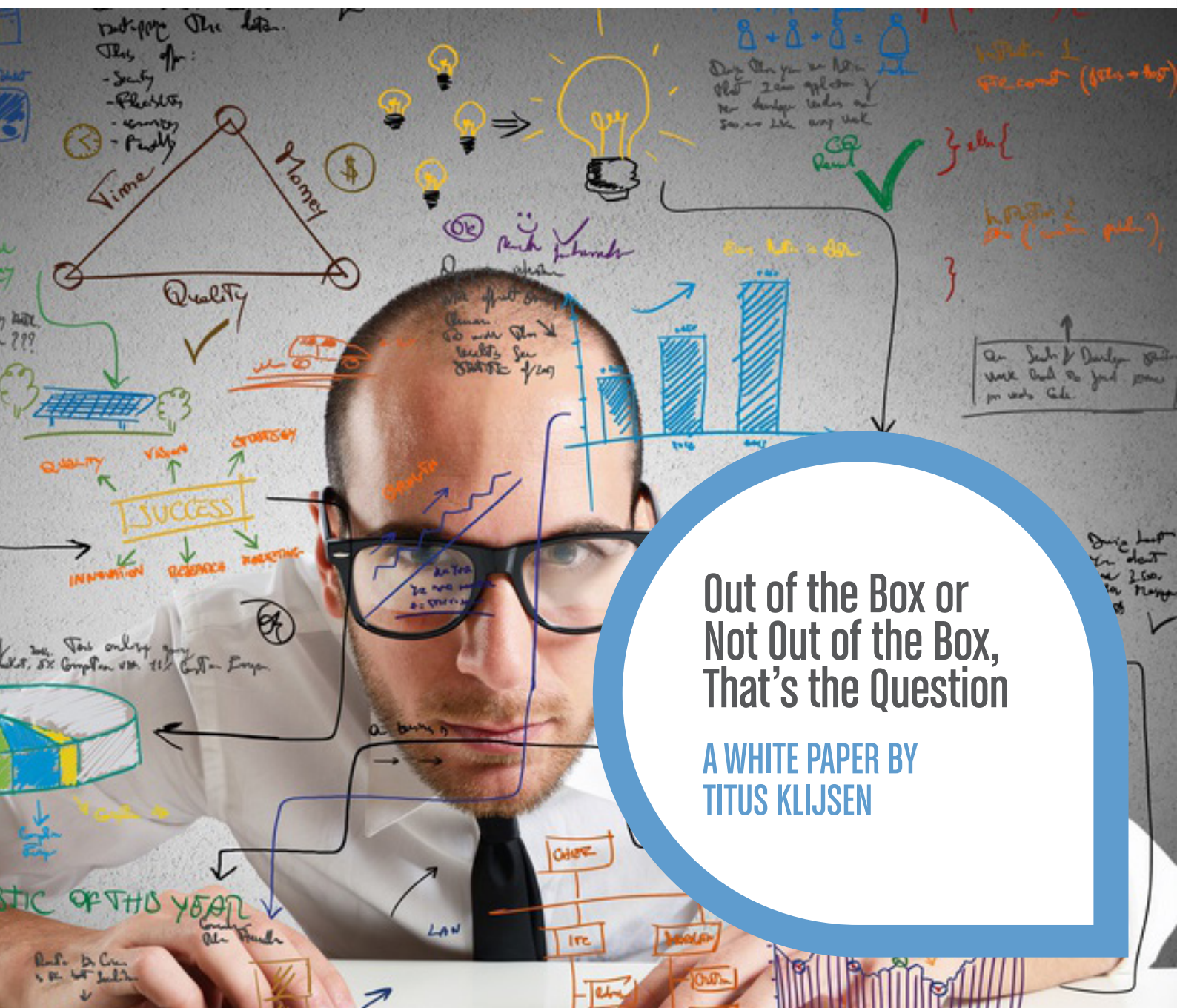


# MEXON TECHNOLOGY

**EXCELLENCE**  
in Service Management



**Out of the Box or  
Not Out of the Box,  
That's the Question**

**A WHITE PAPER BY  
TITUS KLIJSEN**




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# Out of the box (feature)

From Wikipedia, the free encyclopedia

*"Out of the box" redirects here. For other uses, see [Out of the box \(disambiguation\)](#).*

*Not to be confused with [Think out of the box](#).*

An **out of the box feature** or functionality (also called **OOTB** or **Off the shelf**), particularly in [software](#), is a feature or functionality of a product that works immediately after installation without any configuration or modification.<sup>[1][2]</sup> It also means that it is available for all users by default, and are not required to pay additionally to use those features, or needs to be configured.

## Usage of the term [\[ edit \]](#)

If connecting to the internet through WiFi immediately after installing the operating system requires no driver installation or configuring, the WiFi may be said to "work out of the box". This is an important distinction, since some WiFi adapters do not necessarily function properly without some user participation in [installation](#) or [setup](#). The ready-made or standard functionality that comes with any sophisticated software is crucial for marketing their product or offering.

## See also [\[ edit \]](#)

- Out-of-box experience

## References [\[ edit \]](#)

- ↑ "What is out of the box? - Definition from WhatIs.com" [↗](#). Searchcio.techtarget.com. Retrieved 2012-10-12.
- ↑ <http://www.infoworld.com/article/2982937/cloud-computing/amazon-api-gateway-will-be-key-to-enterprise-clouds.html> [↗](#)



*This computing article is a **stub**. You can help Wikipedia by [expanding it](#).*

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# 1. Introduction

Today a huge variety of IT Service Management tools is available on the market. Some of them bring a lot of so called out-of-the-box functionality and promise to keep customizing efforts on a very low level. Provided that customers are ready to stick to the standards they get. However, sometimes especially complex business processes require more flexibility from ITSM software.

**In this whitepaper Titus Klijsen is guiding you through the sometimes complicated debate about the pros and cons of out of the box solutions versus flexible tools that facilitate a little more customization.**

Nowadays most IT Departments are familiar with some kind of management framework for their day-to-day work. These frameworks, like for example ITIL or COBIT introduced processes like Incident Management and Configuration Management. Prior to the introduction of these frameworks, in the early 1990's, there were tools that supported (often only partially) those processes. Tools to support more complex processes like Change Management, Problem Management or Service Level Management were hard to come by, if they even existed at all. An integrated tool which combined the 5 into one integrated solution did really not exist.

The ITIL books told us to discuss, describe, and document the processes our organization needed and afterwards use this documentation to select a tool that supported our processes (the most or the best). They told us what to look for in a tool, but a comprehensive set of actual tool-features and functions did not exist. There was no consensus about what the standard product should look like, the term Out-of-the-box was not even heard of yet.



So what happened in most or all cases when an IT department started an IT Service Management implementation project? The tool, or even toolkit as it existed, supplied by the manufacturer was configured, tuned, amended and changed. The outcome a so called 'bespoke' implementation.

Usually the input for these adjustments came from the project team which implemented the processes in the (customer's) organization. In each and every implementation the wheel was invented and even reinvented. Common sense suggests that a process, like the Incident Management Process, is likely to be almost the same in every organization. And the same consequently goes for the supporting tools and its functionalities. Maybe not exactly the same but with great similarity.





## Small and large organizations usually have a different approach to defining requirements

Nearing the turn of the century ITIL was no longer something only for early-adaptors. Many companies started fresh on their journey. Early adopters of process orientation usually were large organizations with large(r) budgets, with process specialists and with experience in implementing any kind of supporting tool. Their experience taught them what an integrated support tool should be able to do.

Organizations that made the switch later in time were usually smaller and had no, or limited budgets, less time available or just no interest in doing so. Their ambition to invest in determining requirements was very low. They expected to find a tool that provides functionality to support standard processes (as described in e.g. ITIL). The demand for one tool that supports all (standard) ITIL processes without any adjustments was suddenly omni-present. The call for 'Out-of-the-box' became louder and louder.





## A definition of out of the box and bespoke solutions

### What is the definition of Out-of-the-box?

According to Wikipedia:

*“An out of the box feature or functionality also called as OOTB or Off the shelf, particularly in software, is a feature or functionality of a product that works immediately after installation without any configuration or modification. It also means that it is available for all users by default, and are not required to pay additionally to use those features, or needs to be configured.”*

### What is the definition of Bespoke?

According to Wikipedia:

*“Bespoke” is an adjective for anything commissioned to a particular specification. It may be altered or tailored to the customs, tastes, or usage of an individual purchaser.”*

These definitions leave room for interpretation. Let's look at some issues. For example: A priority matrix is quite common for an Incident Management process. Such a matrix combines urgency with impact to determine the necessary priority. But there is no real standard definition for all of these concepts.

The values used for these concepts vary from case to case, from business to business. Terms like “high”, “medium” and “low” are commonly used, but in the end they are very subjective and therefore useless. Most people, companies or organizations will consider the definition and implementation of a priority matrix as part of (a bit of) configuration.

Does that already mean that the tool is no longer out-of-the box?

Thinking about the development of frameworks, toolsets and requirements in the last couple of years, it becomes clear that IT organizations carefully need to consider customizing as an aspect of tool evaluation. Especially with respect to the fact that the decision for out-of-the-box or not out-of-the box might also have substantial financial consequences. In this whitepaper we are discussing the use of tools that are out-of-the-box versus bespoke and configuration, their different benefits, their disadvantages and their risks.



## The Many Grey Areas Surrounding Out-of-the Box

There is enough room for interpretation when we talk about out-of-the-box. Even within a smaller group of people who are familiar with the topic there are some grey areas we want to highlight in the following chapter.

Please take a look at the following statements:

### 1. If no programming is needed it must be out-of-the-box!

The tool does not require any programming to configure, therefore it is out-of-the-box. Is that actually true? And what definition do you use when you determine something is programming? Does programming only suggest that an actual programming-language is used (like C# or Java)? Or is something created in SQL (Structured Query Language) also considered programming?

### 2. If the tool comes with a toolbox, does it then remain out-of-the-box?

Apparently this question depends on the individual point of view. Depending on who you ask, the answer to this question might become a little bit confusing. We have heard customers argue that they want to remain out-of-the-box. At the same time they argue that using specific tools which were delivered together with the whole toolset is not programming. What if you only use parts of the toolbox? What if the toolbox only adds things? What if the toolbox only configures?

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### **3. If we remain out-of-the-box there will be no upgrade issues!**

Well certainly in some cases this may be correct. But it depends on what you mean when you say “no upgrade issues”. If the newer version of the product actually removes a function you like and use, it will most certainly be an issue for you. And this has nothing to do with out-of-the-box or not.

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### **4. The costs of maintaining a system are lower when it remains out-of-the-box**

In many situations this will be true. But in situations where the tool does not fulfill the functional requirements of your organization, there may be hidden costs! What if information is misinterpreted because the system does not exactly facilitate what you need? What if out-of-the-box needs more effort by its users and what if the business case for configuration actually is of a great benefit?

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### **5. An ITSM tool is the same for everyone, so why not out-of-the-box?**

There are many examples like the priority-matrix mentioned earlier in the introduction, which in fact depend on the individual customer or service organization. Just think of the situation of a bank. A bank-account number is most certainly not needed by 99% of ITSM users, but perhaps you do need it. Now, who is right and who is wrong?

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### **6. If what you configure or program does not disappear after an upgrade, is it then out-of-the-box or not?**

This may seem like the most interesting question. But is the question itself important? Or is it the results that are more important for your organization? Does it give you a benefit and does it not create additional costs?





**7. Is the concept out-of-the-box a goal in itself?**

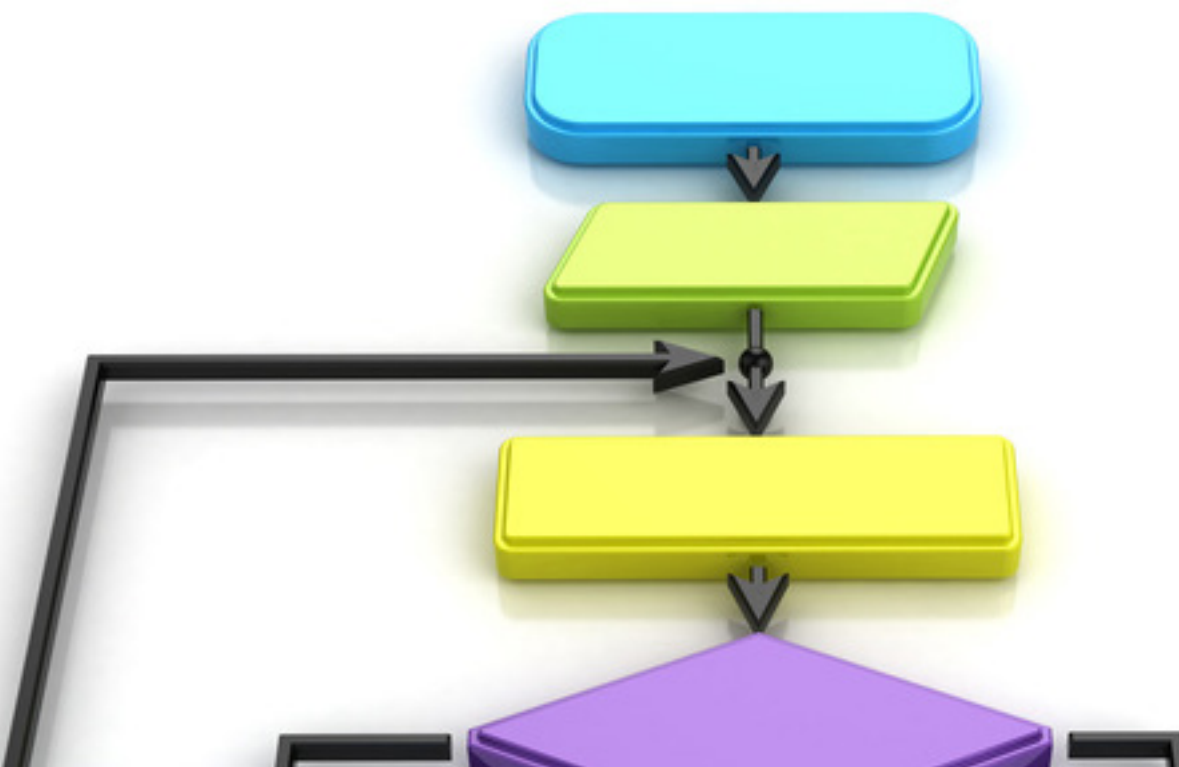
Probably it isn't. There is a whole train of thought behind the usage of the out-of-the-box idea and therein lies the actual goal. So probably some, all or most of the above statements are applicable in any situation, but which are applicable in yours?

**8. If we use the tool out-of-the-box, our processes have to follow the built-in processes**

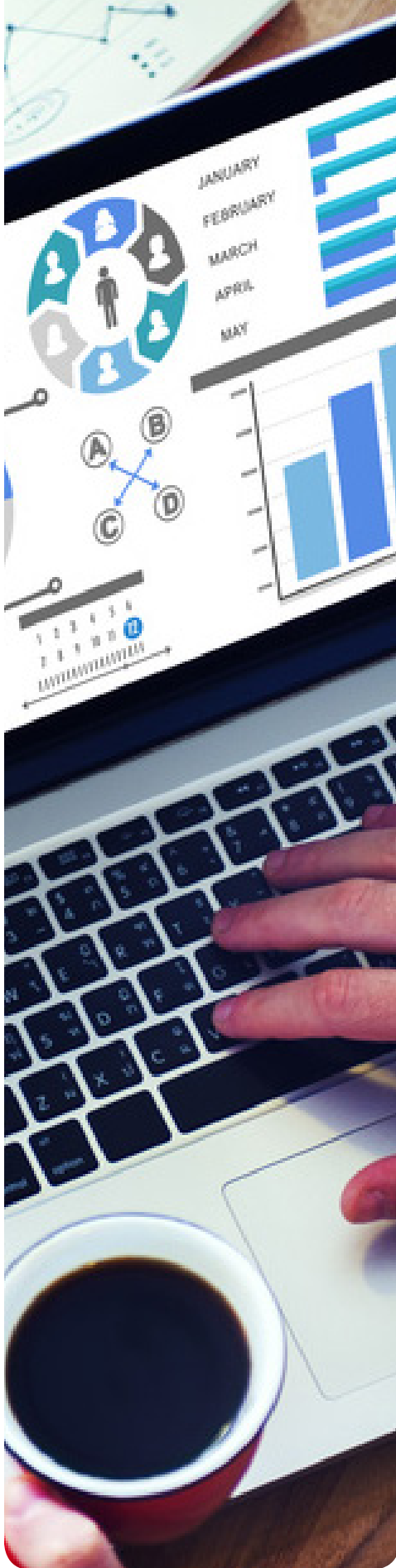
Very often organizations decide to change the internal processes in order to keep the tool out-of-the-box instead of changing the tool (by making adjustments) to make it comply with the processes. Many organizations take a stand on this issue, as if it is a part of their mission/vision. Taking a stand seems to block the objective analysis of what is actually the case. What determines the level of process support?

**9. Our business is unique, therefore out-of-the-box will not fit our needs**

Nobody likes to hear that they are not unique. Of course there are elements that will distinguish one company from the other, but the question is whether these issues will create an essential difference in the way a supporting department (like IT) works. The fact that ITIL and for example COBIT are so widely adopted suggests that it doesn't.







## 1. Differentiate or specify the needs

A complex tool like a Service Management tool usually offers a number of distinctive areas for possible adjustments:

- **Basic information**

Basic information comprises data which is key for the proper functioning of the tool. It consists of matrices and tables with elementary data. Examples are: the priority table, the priority matrix, the incident types and other Service Level Agreement oriented information.

- **General data**

General data is also specific data, for example information about the organization (e.g. the definition of customers and support organization).

- **Case data**

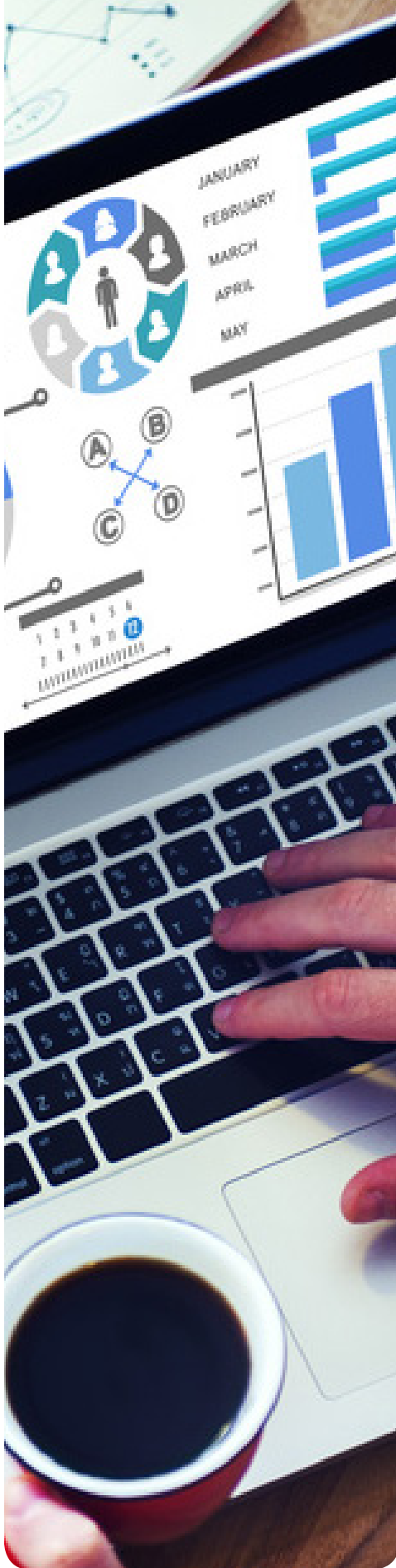
This type of data is associated with the processes that are being supported. It includes all things that are usually documented when registering an incident, complaint, event, change, etc.

- **Business or customer specific data**

Normally every business or organization has some specific information that is needed to perform certain tasks. If it is not stored in the tool (or the tool has no provisioning for custom attributes), companies have to decide how they want to provide this information.

- **Workflow**

Every tool has its own implementation of a workflow. Hopefully sufficient to comply with ITIL Best Practices. Any changes to a standard workflow require customization. It takes courage to challenge necessary changes and to look for another (more standard) workflow. It will usually have the same result.



## 2. Integration with the environment / other systems

In most organizations there is more than just one application supporting the business. The need for a single point of responsibility for data will drive the need to integrate with other systems. Depending on the flexibility and functionality of the tool, this has to be done by either programming or configuration.

## 3. Data Conversion

When implementing a tool, data from other systems (a previous tool or complementary systems) needs to be imported at some point. In order to prepare the data for a seamless import, some data conversion (one time or repeatedly) might be required. The capabilities of the ITSM tool and/or your point of view determine whether this procedure is still out-of-the-box or already programming. Think of certain data for example which exists in the old system but cannot exist in the new system. Are you prepared to lose this data?

## 4. Are your professionals as professional as they should be?

Every IT employee claims to be an IT professional. But is he or she really an IT professional? Are they able to read between the lines and see what the real question or incident is? Or are they only thinking in 0 and 1 (true or false) and strictly following the (their) rules. Implementing a Service Management tool often drives IT professionals to act strictly according to rules, forgetting that a tool needs input. Input in the form of guidelines, known-errors, knowledge. Then and only then, the overall performance of an IT department will improve.



## 10 Benefits of an out-of-the-box solution

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Of course if you do not change or add anything and do no coding, programming, changing of any function or feature in your IT Service Management tool, there are certain benefits.

### **1. Lower project costs**

No adjustments to a tool means you do not have to invest time for programming, testing and accepting changes. Since there is a direct relation between time spent and costs, less time means less costs.

### **2. Lower maintenance costs**

If you cannot make or do not allow any changes or additions to the system, you most certainly do not spend any money and time there. No need for the supplier to bill you for his time, no effort from IT-people to do it, and no effort from users to test and learn how to use it. An immediate benefit due to the fact that you are using a tool out-of-the-box.

### **3. Upgrades are easy**

If the vendor provides you with an automated process for updating your system, if he does upgrades for you or if upgrades are processed automatically, the whole upgrading process will be much easier with an out-of-the-box solution.

### **4. You always know what functionality you have and how to use it**

The standard documentation and description of the system will in fact always be correct if you don't customize the system. If you don't make any adjustments, you simply cannot forget to document those changes. Consequently the standard information is always correct.





## 10 Benefits of an out-of-the-box solution

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### **5. No arguments due to the not-invented-by-me syndrome**

It happens more than often that changes were made in the past, for or by someone's predecessor. These changes are sometimes subject for discussions. If none of these changes would have been made, you would not have to get yourself through the trouble of lengthy discussions.

### **6. Training becomes easier**

Training the end-user or (functional) administrator becomes a task that can be done by the manufacturer/supplier of the tool.

### **7. Processes are best practice**

Using the tool out-of-the-box forces an organization to follow the processes defined within the tool. If this tool is validated to support the ITIL processes, it benefits from the experience and all the knowledge that is put in the development of this framework.

### **8. Focus shift to process support**

An implementation project can shift its attention from changing the tool to changing the organization. Most introductions of Service Management tools fail because of insufficient attention towards aspects like supporting the organization to adjust to the new tools and adapt a new, specific way of working.

### **9. No knowledge leaks**

In many organizations only a few specialists have the specific knowledge about how a tool is altered to fit the organization. When changes are not properly documented and specialists suddenly leave the company, this lack of information and knowledge leads to serious problems.

### **10. Personnel**

The more a tool complies with the standard, general principle of ITIL, the easier it is to find employees who understand the way the tool works.



# Why you should not go with an out-of-the-box solution

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There are many good reasons for wanting to configure your system. Whether this always leads to an undesired situation, which is usually associated with not being out-of-the-box, may differ greatly depending on what is applicable to your situation.

## **1. The standard(s) does not fit your business**

Clinging to the data model of the tool can make the tool useless for you. If your organization needs data which the tool does not provide or when data is required in a way the tool does not support, there is a real issue!

Let's get back to our example from the banking industry: You are a bank and you need the account-number of your customer prominently. You need it to actually find your customer. What if you cannot store the information? Are you going to note the account number in the description of the customer's issue? Usually not such a good idea, especially when the information is needed to create reports about for example the amount of issues per account-number, branch etc.

## **2. The functionality is perfect but some level of configuration is required**

The famous priority matrix example is only one of many. What if you need to register information in your CMDB about the purpose of an item? For example for medical purposes. Most certainly Configuration Item-attributes which have a relation to blood-type will not be standard in an IT Service Management tool. So what can you do? Are you going to document blood type A-positive in the serial number field?

## **3. Out-of-the-box forces improper use of fields**

If your organization needs to document attributes that are not a standard part of the tool, it might be tempting to use a field that is not used for that purpose. The result: Relevant information is stored in strange fields. This increases the need for documentation and briefing of new personnel. When the field is used for other than its predefined purposes, it could also be overlooked when installing a new release of the software.



## Why you should not go with an out-of-the-box solution

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### **4. Out-of-the-box fields not adjusted**

Insufficient knowledge about what is actually part of tool configuration versus tool alteration could lead to using example values instead of changing values to organization specific values.

### **5. You adapt your processes to the product**

Of course you can change your processes to fit the tool. There is nothing wrong with that. But what if this is not possible because your process is specific to your business. You would not be the first organization where the priority matrix contains High, Medium and Low for both Impact and Urgency just because these values were present in the 'out-of-the-box' installation but were in fact intended as sample data (so the user sees how something functions when the software is installed)

### **6. The government or other institute requires you to report on information which does not exist**

Imagine you need to report on a certain KPI and this KPI does not exist in your out of the box solution. Or even worse, the information you need to actually create the KPI does not exist. What can you do? Information is not created just because you want it to, it is possible that you need to configure functions or add fields to actually create and track data which then later becomes the basis for your KPI. How often are KPI's wrong because they are based on non-existing data or even the wrong set of data? It happens too often, more than you might think. If you report on the uptime of something which in fact is based on the incident registration, you are assuming that if there are no incidents the service must be up. Nice assumption, but not necessarily true.

### **7. Dependency on supplier**

One of the risks of using a tool out-of-the box is that no internal knowledge is maintained. Heavily leaning on the supplier is a real threat for an organization.





## How to solve the dilemma

In the end it is not about a simple decision in favor of or against out-of-the-box. It is more important to try and understand what the underlying principles of these two concepts mean to you and your organization.

If you believe your processes and your needs are very common or average and that what works for others will also work for your organization, by all means try and limit modifications as much as possible. Can you determine the impact of an Incident by using High, Medium and Low when it should be clear what the impact is on the service you provide? If statements like “Nobody can use it”, “50% of its users cannot use it” and “Just one person cannot use it” seem a better and less subjective way of describing the impact of an incident on your business, then you certainly need to make changes.

Of course nobody wants to create unnecessary costs, hire consultants or spend time on changing things themselves, when there is no need to. So probably it is more important to think about different aspects of your business, your processes and implementation first, then create a business case and finally take the actual decision instead of just going ahead and doing things without careful consideration.

Imagine you could just have the best of both worlds ... If you could just allow configuration without affecting the ease of upgrades. What if you could just make necessary adjustments yourself? Or even better, what if you could delegate it to the users who actually know what they need? This reduces the number of involved employees and avoids loss of information during transfer.

The best of both worlds is certainly possible, but you have to decide full-heartedly. Such a decision must be supported by all levels of an organization. It wouldn't be the first time a firm “out-of-the-box” statement from management meets a “let's configure because we can” attitude from the workforce.

Ideally, Service Management Software is supporting a large number of out-of-the-box processes, while at the same time it is flexible enough to be customized if necessary. Of course there will never be 100 % out-of-the-box – but the less customization required the better.

Select a partner who understands what aspects of setting up a service management tool are essential to make the implementation within your company a success.



## ABOUT THE AUTHOR

Titus Klijsen, Certified ITIL Service Manager since 1999, managing Professional Services for an IT Service Management software distributor and implementation vendor since mid '90's. Self Service project experience for over 10 years with different products, different customers, and different industries. Previous responsibilities include responsibility for the Service Desk of a Software Distributor.

Mexon Technology is a partner of Wendia, an internationally recognized provider of Service Management solutions for all types of industries and for every major market. With more than 20 years of experience, Wendia is offering a proven and certified solution to large-scale and medium-sized service and IT organizations in Europe and the North America.

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