



**THE INDEPENDENT
SEAL OF APPROVAL**
for outstanding software solutions



SERVIEW Software Vendor Performance Profile

 **serviceaide**[®]

Serviceaide Inc. / Serviceaide GmbH
Service Management Solutions
ChangeGear und Point of Business

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Our professional view of
a well-known company
in the service management
software market

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INTRODUCTION



1.1 OBJECT AND PURPOSE

The SERVIEW Software Vendor Performance Profile is primarily an analysis- and information-based method of presenting the tool vendor and its SERVIEW CERTIFIEDTOOL (SCT) certified solutions from the perspective of SERVIEW GmbH. Our information from research and SCT analysis is supplemented by detailed interviews with representatives of the software vendor and provides the basis for the creation of this document and an associated neutral and objective assessment and evaluation.

1.2 SOURCE OF INFORMATION

We used the following documents as sources of information to create the SERVIEW Software Vendor Performance Profile:

- Information collected during the interview conducted on 31.10.2022 with a representative (Partner Manager EMEA) of Serviceaide GmbH.
- Additionally, provided company information and descriptions of the certified software solution in the form of brochures and presentations, as well as extended vendor sources that we deem valid.
- SERVIEW internal research information and results from assessments, evaluations, and certifications within SERVIEW CERTIFIEDTOOL.

1.3 DISTINCTION AND EXCLUSIONARY CLAUSES

This is not a ranking against other tool vendors on the market, but a purely neutral evaluation and assessment of the software vendor under consideration and its software solution. SERVIEW GmbH stands for absolute neutrality and furthermore does not support any of the vendors and software solutions certified via SERVIEW CERTIFIEDTOOL to gain any market advantages or similar.

This document does not claim to be complete. SERVIEW GmbH assumes no liability for it. The SERVIEW Software Vendor Performance Profile refers to the current information base and investigations in the period of preparation. However, SERVIEW GmbH does not assume any liability for changes or adjustments to the scope of tools and/or tool vendor services that have occurred in the meantime and have not been included in this analysis and evaluation.

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**THE ORGANIZATION
SERVICEAIDE®**



Serviceaide is a leader in modern service management. The company was founded by Wai Wong the CEO and William Guinn, the Chief Technology Officer. They began working together in 2013, when they founded WGSigma, which was based on developing AI based solutions. Serviceaide was created leveraging those solutions with the acquisition of an ITSM solution. Their passion to change the approach to service and support management took off. Serviceaide’s headquarters is in California/U.S. with offices around the globe.

As CEO of the organization, Wai Wong is significantly shaping the continual and sustainable growth of the Serviceaide software solutions, together with a leadership board of 10 members. This team is very well coordinated and has a long history of building and operating global support centers and servicing hundreds of thousands of knowledge workers. They have many years of experience in a wide range of areas and understand their various customers and their challenges.

With the acquisition of Wendia in 2020 and SunView Software in 2021, Serviceaide continued to expand it’s portfolio and capabilities to serve customers in the U.S., Canada, Europe, Asia and Latin America. The company sells both direct to customers and leverages an extensive partner network. **The business model is dependent on what works best for the region, and how to best meet the needs of the market.**

The success is demonstrated by more than **2000 customers** from various sectors and enterprise sizes **in over 40 countries**. The industries scope includes companies from education, energy and utilities, financial services, government, and healthcare. Today, 5 years after founding, Serviceaide continues to expand its worldwide operations and service capabilities as they recognized, IT and enterprise service organizations seek advanced and affordable solutions to increase productivity, service automation and quality.

Company locations and addresses	<ol style="list-style-type: none"> 1. Serviceaide Inc. 1762 Technology Drive, Suite 116, San Jose, California, 95110, USA 2. Serviceaide GmbH Garmischer Straße 4, 80339 München, Deutschland <p>And further locations</p>
Founder & Management	<ul style="list-style-type: none"> • Wai Wong (CEO, Founder) • Bill Guinn (CTO, Founder) • Wai Wong (Managing Director Germany / Managing Director and VP Sales USA & Europe) <p>And further leadership members</p>

Additional details can be found on the Serviceaide website / about us.

**> 2000 CUSTOMERS
IN OVER 40 COUNTRIES**

3 CORE BUSINESS AND CUSTOMER ORIENTATION



Effective service and support are necessary for all companies to succeed. Serviceaide understands this premise and is committed to delivering modern service management solutions that benefit both the IT analysts as well as end users (employees and customers).

Leveraging AI based technologies, increasing automation, and driving a self-service mindset is at the heart of modern service management. The benefits include greater efficiencies and reduced costs, improved user satisfaction, and increased productivity (for both the IT analyst and end user).

- **Consumerization:** means that users of electronic devices and services increasingly use them for their work as they are intuitive and simple, based on a user interface that is easy to use. It is about recognizing and exploring technology potential and creating value without the need for specific skills or a previous training. Serviceaide works on improved self-services with a virtual agent and knowledge manager to ensure easier access to information.
- **Automation:** Serviceaide offers a broad portfolio of service solutions to take the power and advantage of automation. The idea is to apply automation on a large scale across data, workflows, applications, and systems to improve the enterprise-wide services of their customer. The focus is on providing highly sophisticated and integrated services, which are easy to implement, use and manage.
- **Intelligence:** the trend of the last years has demonstrated that IT service management is closely intertwined with the opportunities of artificial intelligence (AI) and machine learning (ML) in particular. Due to this ongoing evolution, Serviceaide makes continuous development progress of the virtual agent and helps their customers to remove complexity and optimize efficiency of their services.
- **Business Value:** As companies deliver better service and support, productivity grows. Serviceaide prides itself on delivering measurable value. That includes time to market (implementation), and the ability to measure ROI. The ability to sell modular product solutions also ensures that companies do not over buy. Instead, companies purchase what they need, and come back to expand their solutions as their business requirements change and grow.

The service management solutions named ChangeGear, Point of Business and LUMA are used by medium to large enterprises, as well as managed service provider (MSP) worldwide. Serviceaide offers special programs for technology partners, resellers, and MSP. **They cooperate meanwhile with more than 25 Partner worldwide.** As the functional scope of the software solutions can be used independently of the industry, the customers are from the most different market segments (see chapter 2). Both Service Management Solutions and the virtual agent and knowledge manager LUMA, are used by many customers to

MODERN SERVICE MANAGEMENT DESIGNED FOR YOU





complement and optimize their existing ITSM tools. Serviceaide attaches significant importance to a **joint approach with customer** while working on enhanced self-services and improved user experience. Exactly this experience plays a significant fact, so **Serviceaide always puts itself in the user's perspective**, which means into the role of the support technician as well as into the role of an end-user. How can the respective person / role get the information required quickly and easily? Already Albert Einstein once said: **“I don't need to know everything, I just need to know where to find it, when I need it.”** An essential requirement for every self-service.

Serviceaide's core business

- Service management platforms, including software development, operation, and support with focus on service management (ITSM) and enterprise management (ESM)
- Digital suite including artificial intelligence (AI), machine learning (ML) and natural language processing (NLP)
- Consulting, project management, implementation, and training

Key features of Serviceaide's customer orientation

- Professionalism for customer and partner - Everything from one source
- Location independence through professional virtual implementations and support
- Customer proximity through regular networking, exchange of experience and development impulses for the products



4 THE CERTIFIED SOFTWARE CHANGEGEAR AND POB



Service and support are two of the critical foundations for provider organizations. No matter if it is serving the needs of employees or customers, organizations must provide help, answer questions, and develop a self-serve environment to reduce costs and increase productivity and satisfaction. Leading companies implement appropriate technology to provide a seamless, effective service experience. At Serviceaide, the view of modern service management is to enable innovative technologies such as Artificial intelligence (AI) to help companies automate processes, incorporate knowledge in best practices, and leverage virtual agents for increased self-service.

Serviceaide has an answer to this challenge through many years of experience. Their product portfolio includes two service management platforms which are certified by Servview, called ChangeGear and Point of Business (POB). In addition to that, Serviceaide offers LUMA as digital suite of products that include a virtual agent and knowledge Management.

ChangeGear

This solution sets the foundation for digital transformation by providing a common platform that maximizes work productivity, so service management teams can do more with less. It provides a **user-friendly interface that is easy to navigate**. Configurable with drag-n-drop editing, it is easily customizable to meet end-user needs. ChangeGear has multiple user views with interfaces for developers, IT operations, and business users. The solution has been acquired from SunView in 2021 and is known for its strength in change management, matching the name. For this reason, ChangeGear is popular in industries with heavy compliance regulations, but the platform offers even more and supports several ITIL practices*. The machine learning engine provides historical reporting to make intelligent predictions and recommendations for **clever decision-making**. Another functionality is **advanced automation** that delivers seamless workflow automation and reduces repetitive or manual tasks. A self-service portal completes the range, which can be set up for each unique organization and automates support for common service requests. In terms of measurement and reporting, ChangeGear already offers 150 reports via dashboard function. These include technical analyses as well as Key Performance Indicator (KPIs) for management teams. ChangeGear is an enterprise ready service management suite but also but also scalable to medium sized companies.

Point of Business (POB)

This is a low code application platform. It is a highly customizable service, and support solution. **While POB is an effective IT service management solution, it can be leveraged for broader usage across functional areas like Human resources, Procurement, Finance etc.** The solution has been acquired from Wendia in 2020 and is constantly being further developed by Serviceaide. If service providers are looking to build custom applications and processes; track deep service level management for supply chain management; track purchase orders and requests; there are many use cases available. **POB enables organizations to highly customize service and support.** Based on Service Management ITIL processes*, the Point of Business Platform is designed for companies that require customized service solutions with strong application process and workflow. The idea is to deliver better service experiences that improve productivity and user satisfaction or providing better self-service with an intelligent virtual agent (see LUMA). There are a lot of POB use cases across different industries and functions like knowledge management or onboarding within human potential. **POB allows customer to buy what they need to meet their goals.** Serviceaide's premise is: They do not overpay for costly service and support that they never use. Customers can achieve enterprise-rich functionality from service management to project management to supply chain management, always customized for their specific business.





LUMA

LUMA is a digital suite of AI-based products. LUMA Virtual Agent integrates with all Serviceaide solutions, as well as other ITSM tools, communication channels and applications. **Based on AI, machine learning and natural language processing, it supports end-users and customers 24x7 worldwide** finding solutions automatically to service requests, incidents, and other inquiries. LUMA learns by experience with conversations, knowledge retrieval steps, and actions performed, rapidly delivering a quick return on investment. Because of the low code to no-code environment and integration with intuitive service management solutions and communication channels, going live is a fast, seamless process. The virtual agent is a pre-trained and can handle both incoming and outgoing tasks. **LUMA starts with over 100 skills to get organizations started and can also be trained for all specific requirements.** The solution can be used outside the ITSM environment and also answers questions such as „where is the next service station?“ or „how many vacation days do I have left?“. **LUMA can pull data from other systems and is compatible with ITSM tools as well as with major Enterprise-Resource-Planning (ERP) systems.**

Licensing for ChangeGear and POB is possible as named and concurrent user. End users, requesters or approver do not require a license. LUMA Virtual Agent licensing is available as single-user or transactional licensing.

The support model is flexibly tailored to the customer. Serviceaide ensures that customer problems are resolved quickly, efficiently, and to their complete satisfaction. The company stands for responsive and courteous 24/7/365 support. The standard support is offered in English, but the customer can choose his support model, other languages are also possible.

Summary of Serviceaide’s key aspects

Area of use	IT Service & Enterprise Service Management
Operating model	On-premise or public / private cloud
License model	Named user and concurrent license
Support model	24/7/365. English is standard, further languages are possible
Central function modules	ITIL4 compliant process coverage in the core topics with best practice templates
System language	English, Spanish, French and German

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5 APPROACH IN IMPLEMENTATION PROJECTS



Serviceaide offers both traditional, on-premises and hybrid cloud implementations, the customer can flexibly choose. With a hybrid model, administration of the customer system is provided by Serviceaide which can be as comprehensive or basic as desired. Anything from a full application management including the ownership and management of the hardware it resides on, to simple upgrade assistance only. Organizations can scale up or down the services based on their changing needs.

Due to their many years of experience in implementation projects, the Serviceaide teams deal with new customer requirements in a routine and efficient manner. The worldwide partner network makes it possible for Serviceaide to always offer a competent representative in a wide range of languages, which is highly appreciated by customers. The offered cloud solution eliminates the need for an on-site technician in every case, the virtual „remote“ implementations often save time and money and are becoming more and more popular. **The independent and flexible approach of thinking beyond regions and time zones complements the existing virtual corporate culture.**

According to the requirements and needs, a pragmatic out-of-the-box implementation is feasible, but also a customized and tailored solution can be realized. In any case, Serviceaide strives for a reasonable and practical implementation for both sides, because **Serviceaide is aware that customers do not want projects that are too complex, too expensive, and too long** from their point of view. To give customers a first impression, Serviceaide offers live demos that provide an overview of the software solutions' functionality and where customers can raise initial questions.

From the first contact, it is very important for Serviceaide to provide a targeted implementation of the requirements with strong and direct customer involvement. The approach follows an agile philosophy, which means that the customer is involved in every step and based on his feedback, the next steps or adjustments in the implementation project are made together. To get started, basic training courses are offered, while information material and tutorials supplement the knowledge portfolio to empower customers further. In general, Serviceaide wants to work together with the customer on the implementation and further development of the software solutions. Although both software solutions are very user-friendly service management platforms, it is a prerequisite that resources are available on the customer side and that the technical knowledge can be built up among internal employees. An administrator should also be available on the customer side for future modifications.

After successful implementation, Serviceaide continues to focus on high quality and customer satisfaction. Therefore, feedback and the demand for further functions are continuously validated and implemented.

Serviceaide offers:

- On-premise implementations
- hybrid cloud implementations
- competent contact person in different languages
- virtual „remote“ implementations

“Customer satisfaction and high quality lag behind successful implementation for Serviceaid in the foreground“.

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UNIQUE SELLING PRO-POSITION



Looking at the ESM/ITSM software market, we can see that there are numerous vendors that offer comprehensive capabilities to support customers' business processes. In addition to typical features relating to the solutions, there are also clearly definable characteristics that distinguish a software solution or the tool producer from other software manufacturers and service providers operating on the market, which means that they have corresponding unique selling points (USPs). The unique selling proposition highlights the specific benefits of an offer compared to the competition, represents a clear competitive advantage, and can draw the consumer's or customer's attention to the company's services and solutions in a more targeted manner. From a Serviceaide perspective, this means the following for the service management solutions:

KEY USPS OF SERVICEAIDE



1. Ready to use

ChangeGear is an out of the box platform and provides templates, workflows, roles and more than 200 reports.



4. Flexibility

PoB is a codeless application development platform across the enterprise.



2. High Scalability

Despite the ready to use solution, the customer can customize ChangeGear to his specific requirements.



5. Supplement

Despite the use of global tool providers, POB complements the customer's additional service processes.



3. Train the Trainer concept

The customer is independent and enabled to build up the necessary system knowledge within its own organization.

Several awards in the last five years underline Serviceaide's position. Among others, they were able to achieve the title „Named Leader in Forrester Wave for Standalone Chatbots for IT Ops“ and Aragon Research's „Hot Vendor Award“.

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**MARKET DEVELOPMENT
AND TRENDS**


In assessing the future trends in service management, Serviceaide is convinced **that topics such as self-service and shift-left approaches will continue to grow and evolve.** They always take two perspectives into account: the user perspective and the customer perspective. The „user journey“ is about ensuring that the user has all the technical options available to them, that they are comfortable using them, and that the experience is consistently good. For example, via the Virtual Agent, Knowledge Management, the Self-Service Portal incl. catalog, and automated workflows for service requests or incident reports. Serviceaide takes every user into account. The younger „digital natives“ who have grown up in the digital age and are used to requesting service and support via the Internet, systems, and mobile devices. But they are also concerned about older users who first must familiarize themselves with the digital offerings and self-service. For Serviceaide is clear, **the focus is on the use and positive experience of self-services, automation, and artificial intelligence, so the shift-left approach will be successful.** The goal, says Serviceaide, must be to ensure that users have the best possible experience with self-services, which in turn leads to resource savings for customers. Because clients such as utilities, financial services, government, and healthcare want to provide maximum service to their users but have limited resources.

While tools, infrastructure, and automation are still essential to modern service management, Serviceaide focuses on its stakeholders: first, the user - what do they need for a valuable self-service? And secondly, the customer / the company - how can they deliver the best possible self-service with limited resources? From Serviceaide's perspective, the curve of displacement among providers will continue to develop. Customers are increasingly demanding solutions that offer enterprise-wide service alignments in the sense of enterprise service management. Serviceaide sees itself here with its software as a solution and as a supplement to modernize service management and shift-left concepts.



Increase and acceptance
of self-service options



Further development of automation
and artificial intelligence



Saving resources through
the shift-left approach



Flexible addition and extension
to existing ITSM tools

Serviceaide:

*Increase adoption of self-service options.
Save resources through the shift-left approach and
increase productivity. Leverage development
of automation and artificial intelligence capabilities.*

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CONSIDERATION FROM SERVIEW GMBH



We at SERVIEW GmbH, with our many years of experience in the field of service management in various areas, have numerous insights and knowledge about customer situations, their challenges and the associated need for tools and support. Since approx. 20 years we are repeatedly asked in customer situations for our assessment and opinion regarding the tool market. Based on SERVIEW CERTIFIEDTOOL, we have gained a very comprehensive insight into the service management market. For this reason, we can highly recommend the company Serviceaide with the service management platforms ChangeGear and Point of Business. For those wondering if the two solutions are in competition, there is a clear statement. No, both platforms have their special features and meet different requirements.

ChangeGear is focused on classic service processes like service management, change management, and asset management. Further processes can be configured by the customer using ChangeGears' Flex module to implement further processes like supplier management, release management etc. It is not an all-rounder by default, but the Flex module makes it possible to map specific workflows within the value stream. Configurable with drag-n-drop editing, it is easily customizable to meet end-user needs. So ChangeGear is an enterprise ready service management suite but also scalable to medium sized companies.

PoB is a comprehensive and customizable platform with broad ITSM processes and extensive applications across the enterprise. It is powerful and a valuable application in many ways, has therefore dependencies and requires appropriate administration on the customer's side. The PoB portfolio is particularly suitable for organizations that require many standard services in scope and want to map workflows outside the norm.

LUMA Virtual Agent complements both software solutions with a conversational interface that leverages artificial intelligence and natural language processes which allow it to improve over time. Luma Virtual Agent also integrates across other leading solutions.

Serviceaide pursues a holistic goal: for the customer, it's about analysis and efficiency, which parameters can be changed? For the user, it's about the best possible experience and user-friendly systems. **Overall, it's about changing the mindset.** With self-service, automation, and artificial intelligence, much more is possible in Service Management. Serviceaide wants to go this way together with customers / organizations and users. At the same time, Serviceaide customers are very loyal. Despite the changes in the market and the use of other tool vendors, users and organizations are very attached to Serviceaide. Changes and next steps are made together.

OVERALL, IT'S ABOUT CHANGING THE MINDSET.





As SERVIEW GmbH, we can recommend Serviceaide and the ChangeGear and Point of Business (POB) software solutions based on the following strengths and positioning features, among others:

- Best of suite service management portfolio for the mid to high end of the ITSM/ESM market.
- Modern Service Management solutions that leverage the power of artificial intelligence and automation.
- High identification with customer and user to make a Shift Left concept successful.
- Very good compatibility with existing ITSM tools due to complementary offering.
- The customer is independent and enabled to build up the necessary system knowledge within its own organization.
- Reference implementations show reduced ticket volumes, Improved resolution time and cost savings.



For more information about Serviceaide, its services and software solutions, and customer references, visit the Serviceaide website.



Simply scan this QR code and you will go directly to Serviceaide and the service management solutions ChangeGear and Point of Business!

SERVIEW CERTIFIEDTOOL – THE INDEPENDENT QUALITY SEAL

Are you looking for trend-setting software that is optimally compatible with ITIL, PRINCE2 or Scrum? SERVIEW CERTIFIEDTOOL is the independent quality seal for outstanding software without compromise. Since 2003, we are striving for transparency and comparability on the software market with our award, so that you can immediately recognize outstanding software solutions as such.

CERTIFIEDTOOL seal cannot be bought with any money in the world. Vendors of such software solutions show great courage when they face the more than 600 SERVIEW CERTIFIEDTOOL assessment criteria, which include a live presentation of the respective solution. But the effort pays off: More than 50 vendors have already undergone the detailed analysis - many of them successfully.

INDEPENDENT – INCORRUPTIBLE – UNCOMPROMISING

We only award software solutions that truly deserve the SERVIEW CERTIFIEDTOOL seal of quality. The award costs nothing except the courage of the vendors to face the high requirements of about 600 criteria.



Our competent look at
a well-known company
from the service management
software market



**SOFTWARE VENDOR PERFORMANCE PROFILE
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