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Regarding: Funding Justification - IT Service Management (ITSM) Platform - HaloITSM

Purpose

This letter provides firm cost figures and supporting justification for the acquisition and implementation of HaloITSM as the City's IT Service Management platform. It is submitted at the request of the City Administrator following the recent IT Steering Committee discussion, where the strategic benefits of a dedicated ITSM platform were reviewed and well received.

Background - Current State

The IT department does not currently operate a purpose-built service management tool. Ticketing is handled through a permitting-and-licensing module in OpenGov that was repurposed for IT intake. That module remains in use by other departments for its intended permitting and licensing function, however, as an IT service desk, it lacks core service-management capabilities and imposes a workflow that is cumbersome for both staff and end users.

The practical result is that the intake process is avoided rather than used. End users frequently bypass it entirely, leaving handwritten notes for IT staff or simply tolerating issues rather than submitting a request. This produces several operational gaps:

- No reliable record of demand, work performed, or resolution history
- No centralized asset or configuration inventory
- No service metrics to inform staffing, budgeting, or performance discussions
- Limited documentation trail to support compliance and audit needs
- Loss of institutional knowledge as work goes unrecorded

A dedicated ITSM platform addresses each of these directly.



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Proposed Solution

Adopt HaloITSM, a purpose-built ITSM platform that combines service desk, asset and configuration management (CMDB), a self-service portal, knowledge base, workflow automation, and reporting in a single product. HaloITSM uses a non-modular license model, so the full ITIL-aligned feature set is included without per-feature paywalls, and the platform has an established public-sector customer base.

Implementation approach - recommended: Self-implementation supported by 15 hours of HaloITSM consultancy time at a discounted rate of \$200/hour (\$3,000 total), rather than the standard \$7,000 basic implementation package.

This approach is recommended for three reasons:

1. **Existing in-house expertise** - I have built and administered this platform end-to-end in prior roles, including configuration of the modules the City will rely on.
2. **A clean-slate starting point** - The City has no existing ITSM workflows to migrate or re-engineer, so we can adopt HaloITSM's out-of-the-box ITIL v4-aligned workflows directly and refine from there, thereby removing the migration and process-mapping complexity that would otherwise argue for a fully guided engagement. Purchased consultancy hours do not expire, so they can be applied to targeted configuration guidance throughout the build rather than being consumed on a fixed schedule. No historical ticket data will be migrated from OpenGov. The build starts clean, further reducing implementation scope.
3. **Vendor concurrence** - Halo independently recommended this path given our internal knowledge and existing processes.

Choosing self-implementation over the basic package saves \$4,000 in one-time cost while retaining paid consultancy hours for the areas where expert guidance adds the most value.

Security and Data Residency - HaloITSM is delivered as a US-hosted SaaS platform with all data residing in the United States. The platform maintains SOC 2 and ISO 27001 certifications and holds FedRAMP 20x authorization, supporting the City's security and compliance posture across the departments IT serves, including the Police Department.



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Cost Summary

One-time cost

Item	Amount
HalolTSM consultancy - 15 hours @ \$200/hr	\$3,000

Annual recurring cost (subscription, billed annually)

Item	Amount
Named licenses - 9 agents @ \$80/agent/month	\$8,640
Halo Asset Discovery - 1–2,000 endpoints	\$5,295
Subtotal - annual recurring	\$13,935

Cost offset - LanSweeper

The City's current asset-discovery tool, LanSweeper, will be retired. Its renewal (\$4,788/year, due late September/October) will be cancelled rather than renewed, so the offset begins in the first year.

Totals

	Amount
Year 1 total (one-time + first-year subscription)	\$16,935
Less: LanSweeper renewal avoided	(\$4,788)
Net Year 1 cash impact	\$12,147
Ongoing annual (Year 2 onward)	\$13,935
Net ongoing annual (after LanSweeper offset)	\$9,147



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Implementation option comparison

Option	Description	One-time cost
A - Recommended	Self-implementation + 15 hrs consultancy	\$3,000
B	Halo Basic Professional Services bundle - ~30 hours across training, configuration sessions, and project management (5-week guided implementation)	\$7,000

Alternatives Considered

The following platforms were evaluated prior to selecting HaloITSM.

Platform	Assessment / Reason Not Selected
Freshservice	Capable, user-friendly cloud ITSM, but tiered licensing places advanced automation, deeper asset management, and orchestration in higher-cost plans. Reaching parity with HaloITSM's included capabilities raises total cost.
Jira Service Management	Strong in software-development-centric environments and tightly coupled to the Atlassian ecosystem. Without an existing Atlassian investment it is less aligned to a general municipal IT service desk and requires more configuration to match HaloITSM's out-of-the-box ITSM/ITAM.
Xurrent	A capable enterprise/ESM platform oriented toward larger organizations and multi-provider (SIAM) service management. Its positioning and cost are scoped beyond the City's current requirements.
InvGate	Competent ITSM delivered alongside a separate asset-management product. Comparable in capability but offered no advantage over HaloITSM on single-platform consolidation or cost.
HaloITSM (selected)	Full ITSM and IT asset management in a single non-modular platform, discounted pricing, public-sector references, strong support and rapid development, and existing in-house implementation expertise.



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Benefits to the City

1. **Consolidated asset and configuration management** - HaloITSM's CMDB provides full audit history, dependency mapping, supplier and warranty management, and barcode/QR scanning, replacing LanSweeper and giving IT lifecycle, warranty, and renewal visibility across the entire City IT estate.
2. **A service desk staff will actually use** - A modern, SSO-enabled self-service portal (embeddable in Microsoft Teams) with knowledge base and automatic status updates directly addresses the current problem of users bypassing intake, restoring visibility into real demand and ending reliance on informal notes.
3. **Institutional knowledge capture** - Ticket history and a knowledge base preserve resolutions and reduce dependence on individual staff memory.
4. **Metrics and reporting** - Over 150 out-of-the-box ITIL-aligned reports provide objective data on volume, response, and resolution to support staffing, budget, and performance conversations.
5. **Automation and reduced manual overhead** - Native integration with Active Directory / Entra, PowerShell, and Azure Automation allows routine provisioning tasks (account creation, access grants) to be automated from service requests.
6. **Compliance and audit support** - ITIL v4-aligned change and problem management, with documented request and change trails, strengthen the City's posture across the compliance obligations IT tracks.
7. **Unified inter-agency support** - HaloITSM can support multiple organizations from a single platform, giving MMFR and West Milwaukee a proper shared support process (routed queues, tracked requests, and team-wide visibility) rather than depending on any one person's inbox. Today, West Milwaukee's requests are emailed to a single IT staff member who alone receives them. That arrangement, like the OpenGov module, cannot meet MMFR's support needs. Neither agency currently maintains its own IT agents, and none is anticipated within the foreseeable planning horizon, so this support is accommodated within the City's existing agent licensing at no additional cost.
8. **Scalability without paywalls** - Non-modular licensing and 100+ integrations at no extra cost mean the platform can grow to additional sites, departments, and inter-agency support needs without replatforming or feature-gated upsells.
9. **Tool consolidation** - Retiring LanSweeper folds asset discovery into a single platform, reducing both cost and administrative overhead.
10. **Proven in the public sector** - HaloITSM is deployed across comparable government and municipal organizations, reducing the risk of the selection.



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Timing

The recommended path is to bring HaloITSM online within roughly the next 60 days. The new Public Works building, which will ultimately house the Public Works, Engineering, and IT Departments, is currently scheduled to open near year end and will require substantial IT equipment across all three departments. Standing up HaloITSM's CMDB and asset-tracking capability beforehand allows IT to catalogue, tag, and stage that equipment as it arrives, rather than reconstructing the inventory after installation. Each additional month on the current tools is a month of unrecorded demand, untracked assets, and staff time absorbed by informal, post-it-note triage that a proper service desk eliminates. Funding for the platform is not dependent on the Public Works building project. The two are simply well aligned in timing.

Recommendation

I recommend the City authorize the one-time and first-year cost of \$16,935 to acquire and implement HaloITSM under Option A (self-implementation with 15 consultancy hours). The recurring subscription represents a net addition of \$9,147/year to the IT Operating budget after the LanSweeper offset, to be incorporated with the FY2027 budget. I will defer to your direction on the funding source for the initial expenditure.

The City's \$80/agent rate reflects a standing 15% government discount off list pricing and can be locked for a multi-year term (up to five years), fixing the recurring rate for the duration.

- **One-time:** \$3,000 (15 consultancy hours)
- **Annual recurring:** \$13,935 (9 agent licenses + Asset Discovery)
- **Offset:** cancellation of the LanSweeper renewal (\$4,788/year, due late September/October)
- **Net Year 1 cash impact:** \$12,147
- **Net ongoing annual:** \$9,147

Approval now allows IT to stand up the platform in time to catalogue and stage equipment for the new Public Works building ahead of its year-end opening, while delivering the broader service-management benefits outlined above.

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City of West Allis