An Implementation Roadmap

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ITIL v3

GULF itSMF The IT Service Management Forum

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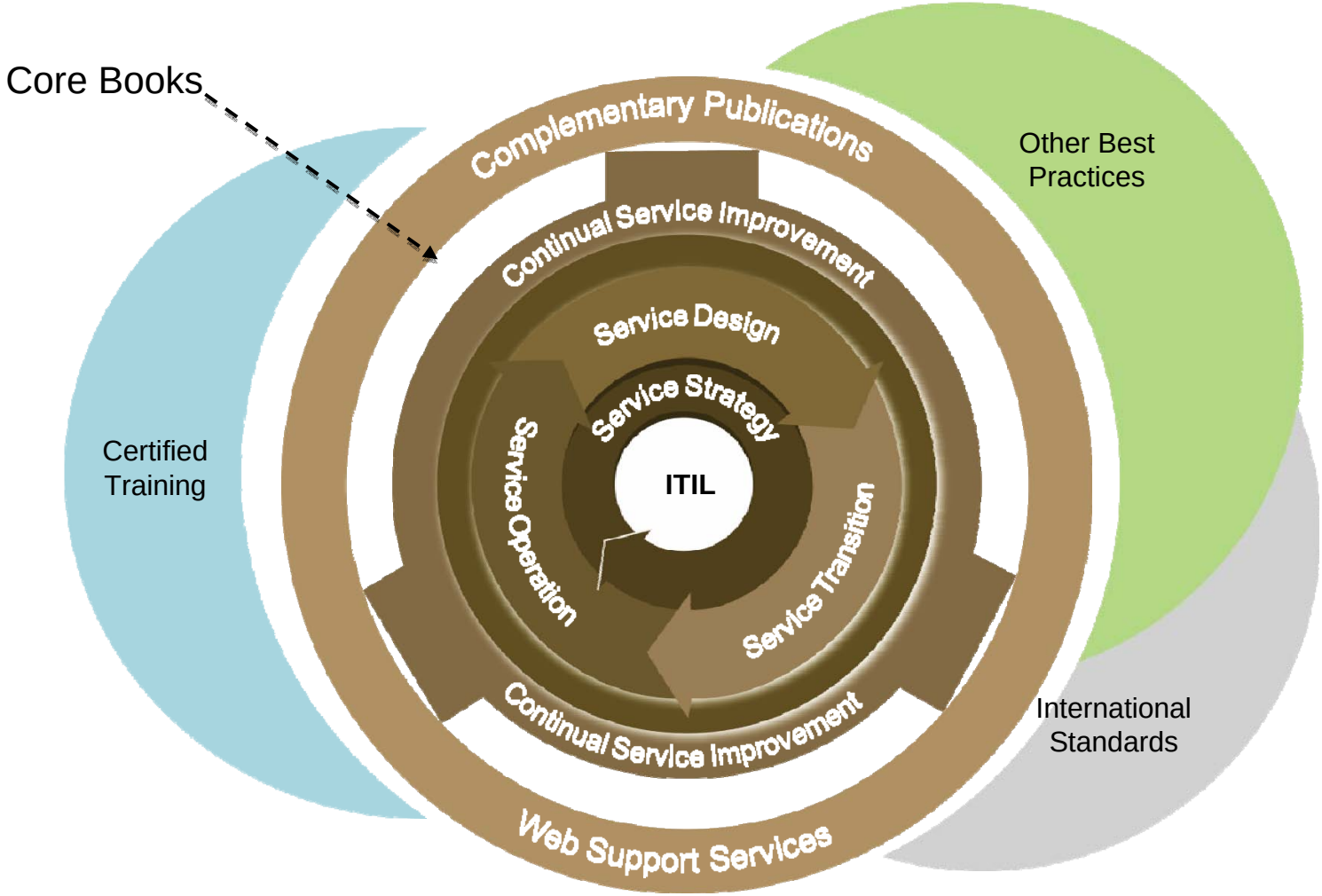
Agenda

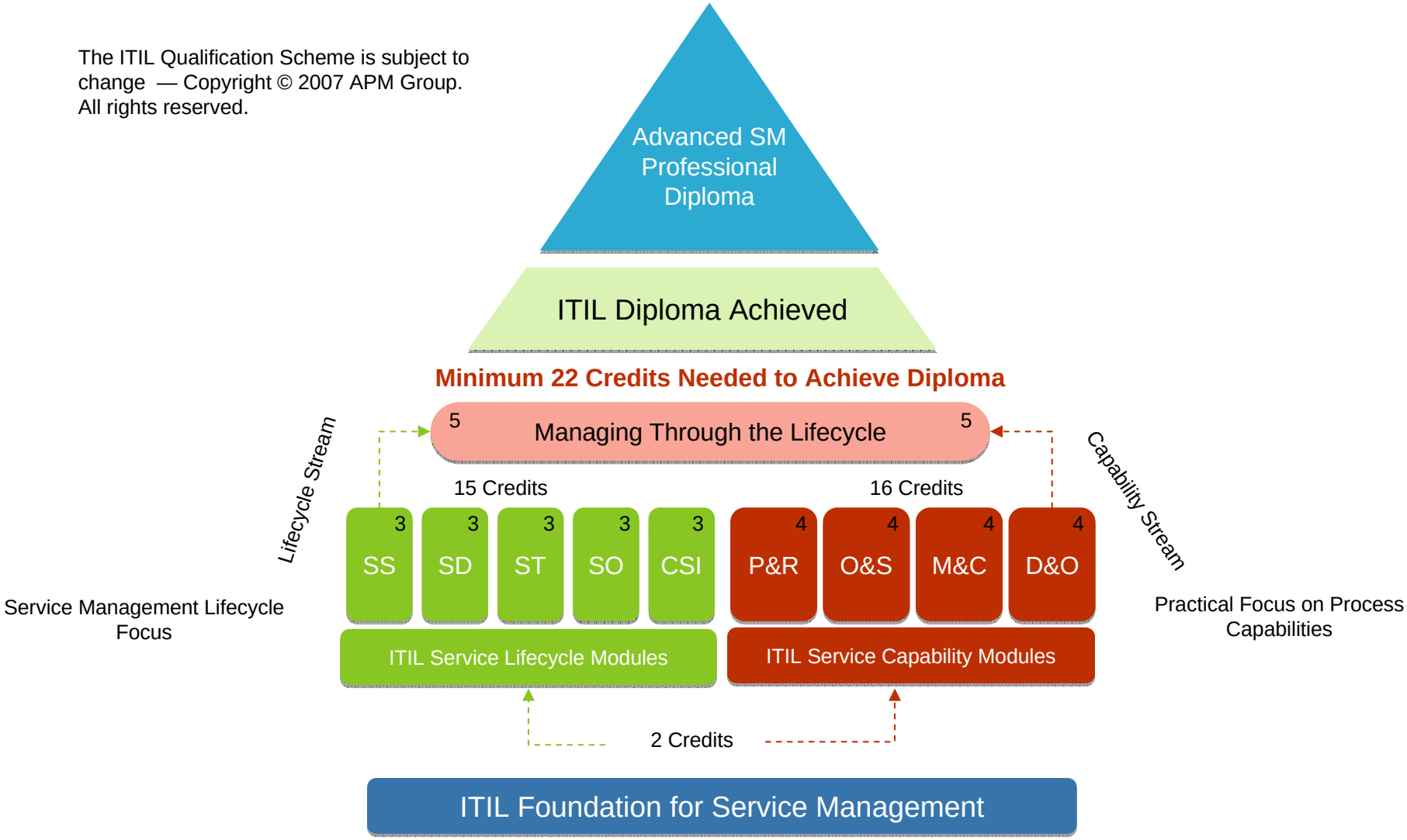
- Overview
- Core Components of Version 3
- Examples of New Elements
- Implementation Drivers
- Summary

The Version 3 Environment

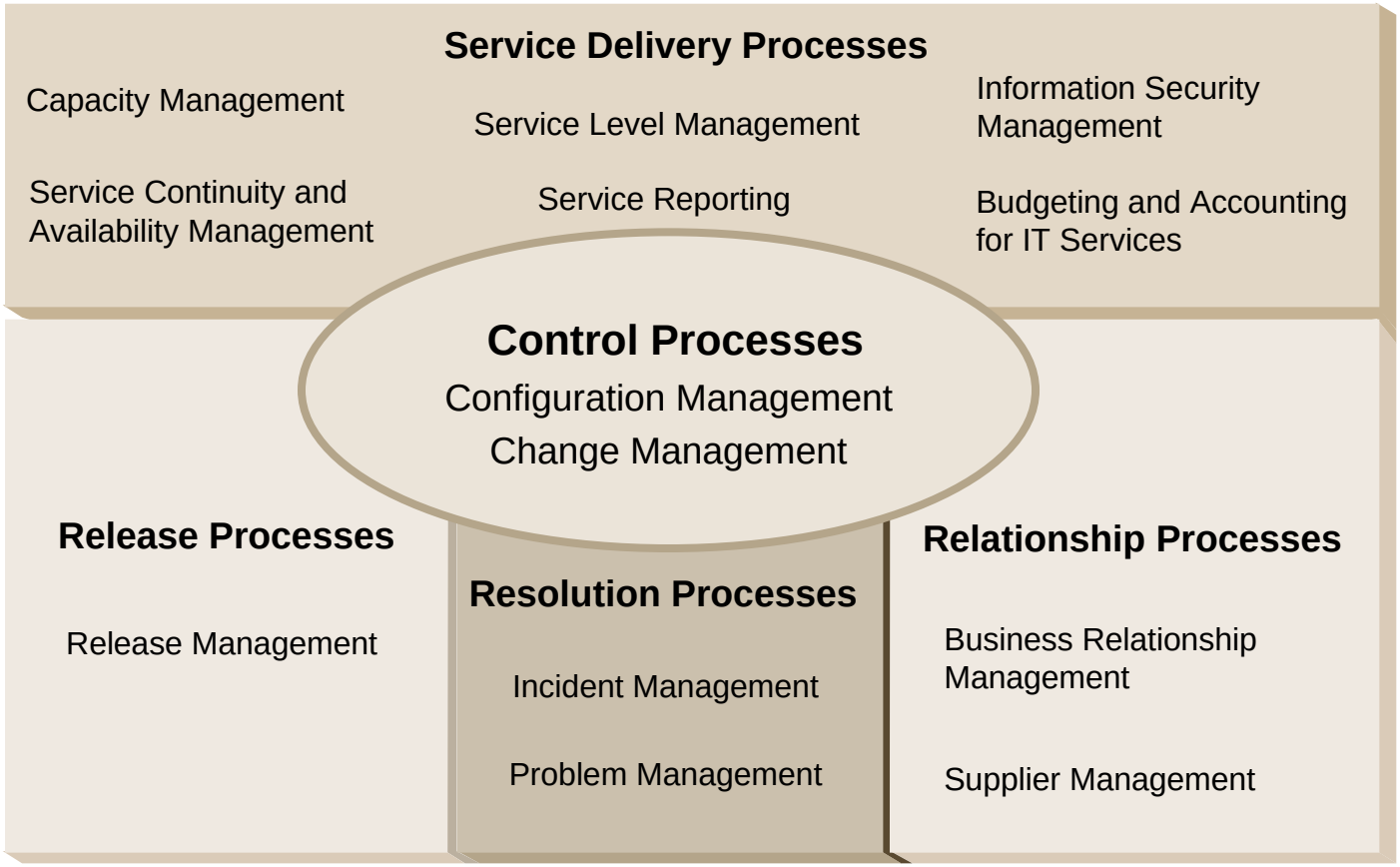


ITIL = Information Technology Infrastructure Library

ITIL Qualification Scheme



General Concepts – ISO 20000



Source: BSI, based on the process diagram in ISO/IEC 20000

General Concepts - Functions

"A function is a team or group of people and the tools they use to perform one or more processes or activities."

- **Functions:**
  - **Provide structure and stability to organizations.**
  - **Are self-contained units of organizations, with their own capabilities and resources.**
  - **Rely on processes for cross-functional coordination and control.**
  - **Have their own knowledge base, built from experience.**
  - **Can result in functional silos if there is a lack of coordination or an inward focus.**

General Concepts - Roles

A role is the set of responsibilities, activities, and authorities defined in a process and assigned to a person or team.

Problem Analyst Role

Incident Support Level 2 Role

Change Initiator Role

Incident Support Level 2 Role

LAN Manager – Functional Job Title

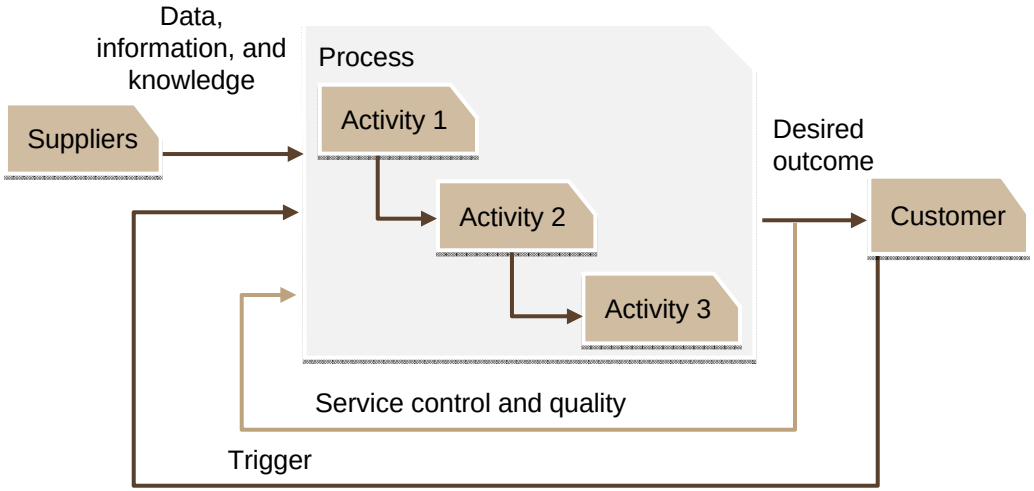
Network Manager – Functional Job Title

General Concepts - Process

A process is a structured set of activities designed to accomplish a specific objective.

Processes:

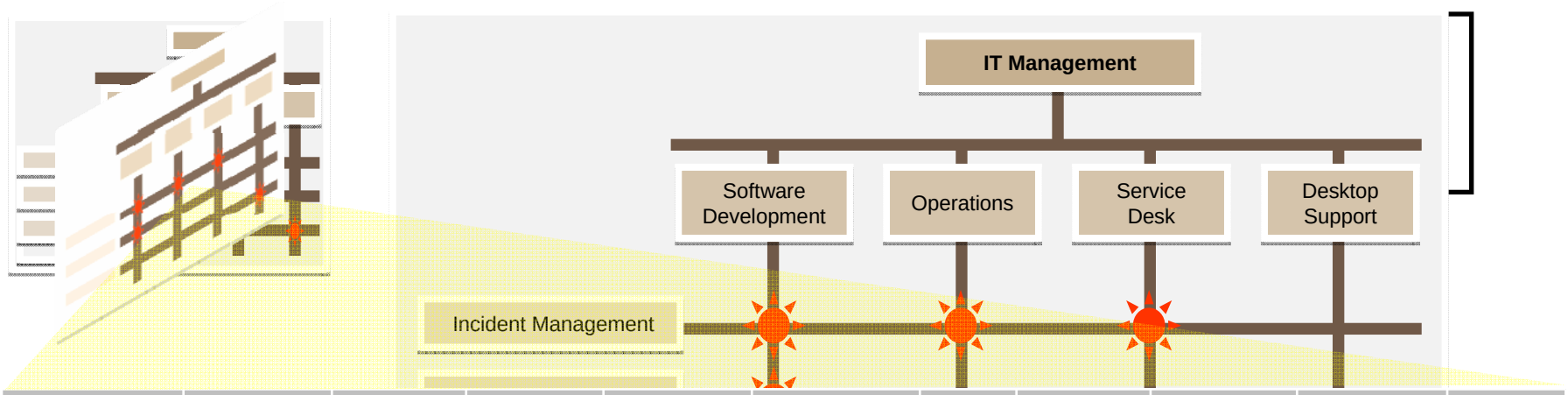
- Create value for all stakeholders.
- Are examples of closed-loop systems based on feedback for self-correcting and reinforcing action.
- Take one or more inputs and turn them into defined outputs.
- Are organized around a set of objectives.
- Include all the roles, responsibilities, tools, and management controls (measures and metrics) to deliver the outputs.
- Once defined and documented, they should be controlled to ensure repeatable results.



Process control is "the activity of planning and regulating a process, with the objective of performing the process in an effective, efficient, and consistent manner."

General Concepts - RACI

RACI is an example of an Authority Matrix, which can be used within organizations to indicate roles and responsibilities in relation to processes and activities.



	Customer	Change Sponsor	Service Desk	Change Manager	Change Coordinator	CAB	ECAB	Change Builder	Change Tester	Etc.
1.0 Record the RFC	R	R		A						
2.0 Review the RFC		I		A	R					
3.0 Assess and Evaluate Change				R/A	R	R		C/I	I	

Service Strategy

Description

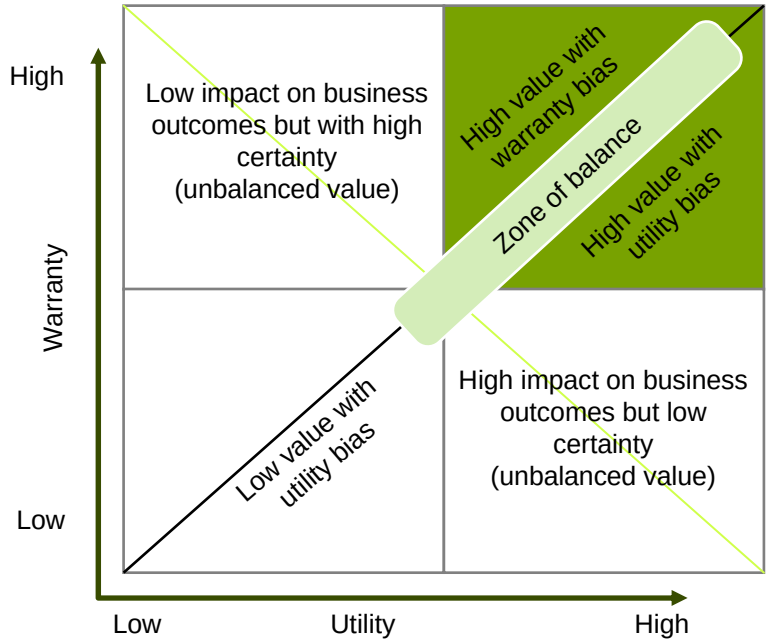
- **Service Strategy provides guidance on how to design, develop, and implement Service Management not only as an organizational capability, but as a Strategic Asset.**
- **Service Strategy includes the processes of:**
  - **Service Strategy**
  - **Service Portfolio Management**
  - **Demand Management**
  - **Financial Management**

Service Strategy – Utility and Warranty

The concepts of utility and warranty are key to understand the customer's perspective of value:

Utility = **Fit for Purpose** – functionality offered by a product or service to meet a particular need

Warranty = **Fit for Use** – a promise or guarantee that availability, capacity, continuity, and security are all meeting customer expectations



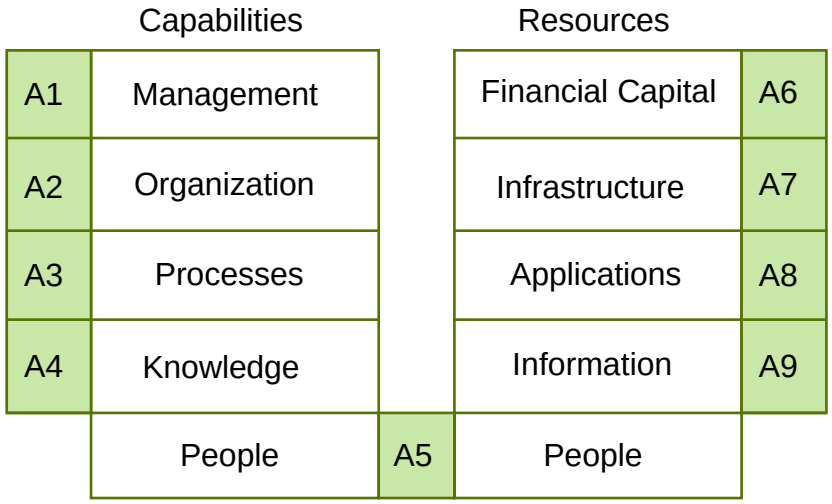
Utility is **what** the customer gets and warranty is **how** it is delivered.

Service Strategy –Capabilities and Resources

Service Assets are the **capabilities** or **resources** of a service provider.

Capabilities = The ability of an organization, person, process, application, Configuration Item, or IT service to carry out an activity. Capabilities are intangible assets and cannot produce value by themselves, without adequate and appropriate resources.

Resources = Include IT infrastructure, people, money, or anything else that might help deliver an IT service. Typically, resources are tangible assets and are relatively easier to acquire than capabilities.

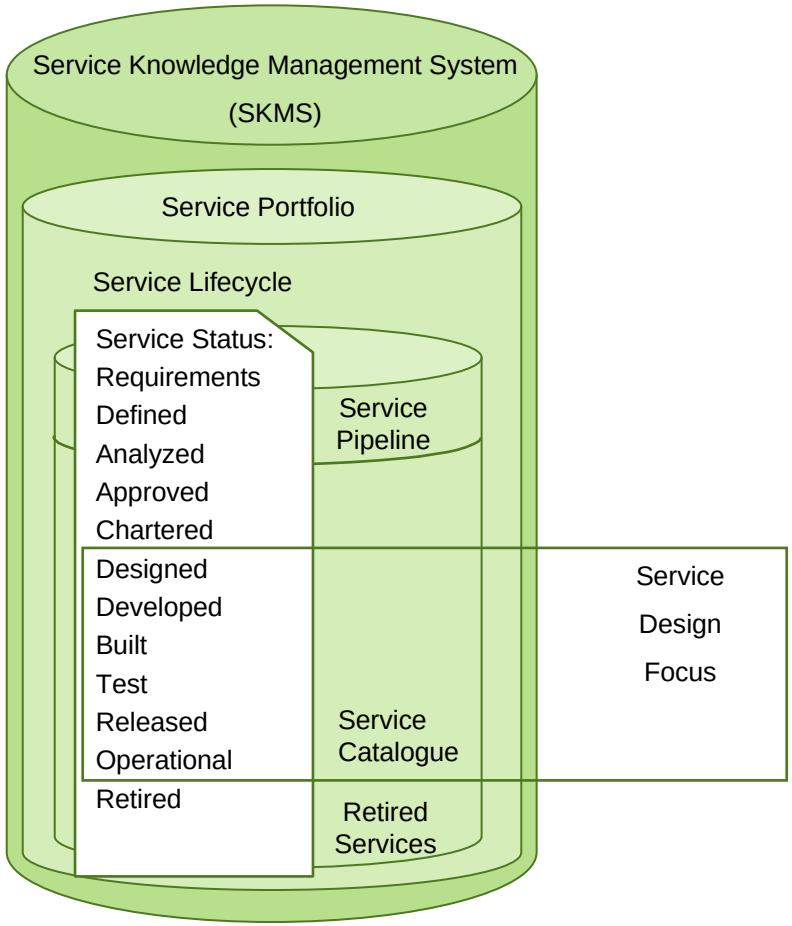


Organizations use resource and capability assets to create value in the form of goods and services.

Service Strategy - Portfolio

The **Service Portfolio** is initially created in Service Strategy and then moved to Service Design to architect the service, which eventually becomes part of the Service Catalogue.

The Service Portfolio should contain information relating to every service and its current status within the organization and the Service Lifecycle.



Service Design

Description

- Service Design provides guidance for the design and development of services and Service Management processes.
- Service Design includes the processes of:
  - Service Level Management
  - Service Catalogue Management
  - Availability Management
  - Information Security Management
  - Supplier Management
  - Capacity Management
  - IT Services Continuity Management

Service Transition

Description

- Service Transition provides guidance on the development and improvement of capabilities for transitioning new and changed services into operations.
- This translates into how the requirements of Service Strategy, designed by Service Design, are moved into production while controlling the risk of failure and disruption.
- This includes the management and coordination of the processes, systems, and functions to package, build, test, and deploy a release into production.
- Service Transition includes the processes of:
  - Change Management
  - Service Asset and Configuration Management
  - Release and Deployment Management
- In the core book, Service Transition also includes these processes:
  - Transition Planning and Support
  - Service Validation and Testing
  - Evaluation
  - Knowledge Management

Service Operation

Description

- Service Operation provides guidance on achieving efficiency and effectiveness in the delivery and support of services to ensure value for the customer and the service provider.
- Strategic objectives are realized through Service Operations, making it a critical capability.
- Its scope includes:

Services – any activity that forms part of a service is included in Service Operation.

Service Management processes – the ongoing management and execution of many Service Management processes are performed in Service Operation.

Technology – all services require some form of technology to be delivered.

People – it is people that manage the technology, processes, and services.

Service Operation - Continued

Description

- Service Operation includes the following processes:
  - Event Management
  - Incident Management
  - Request Fulfillment
  - Problem Management
  - Access Management
- And the following functions:
  - Service Desk
  - Technical Management
  - IT Operations Management
  - Application Management

Continual Service Improvement (CSI)

Description

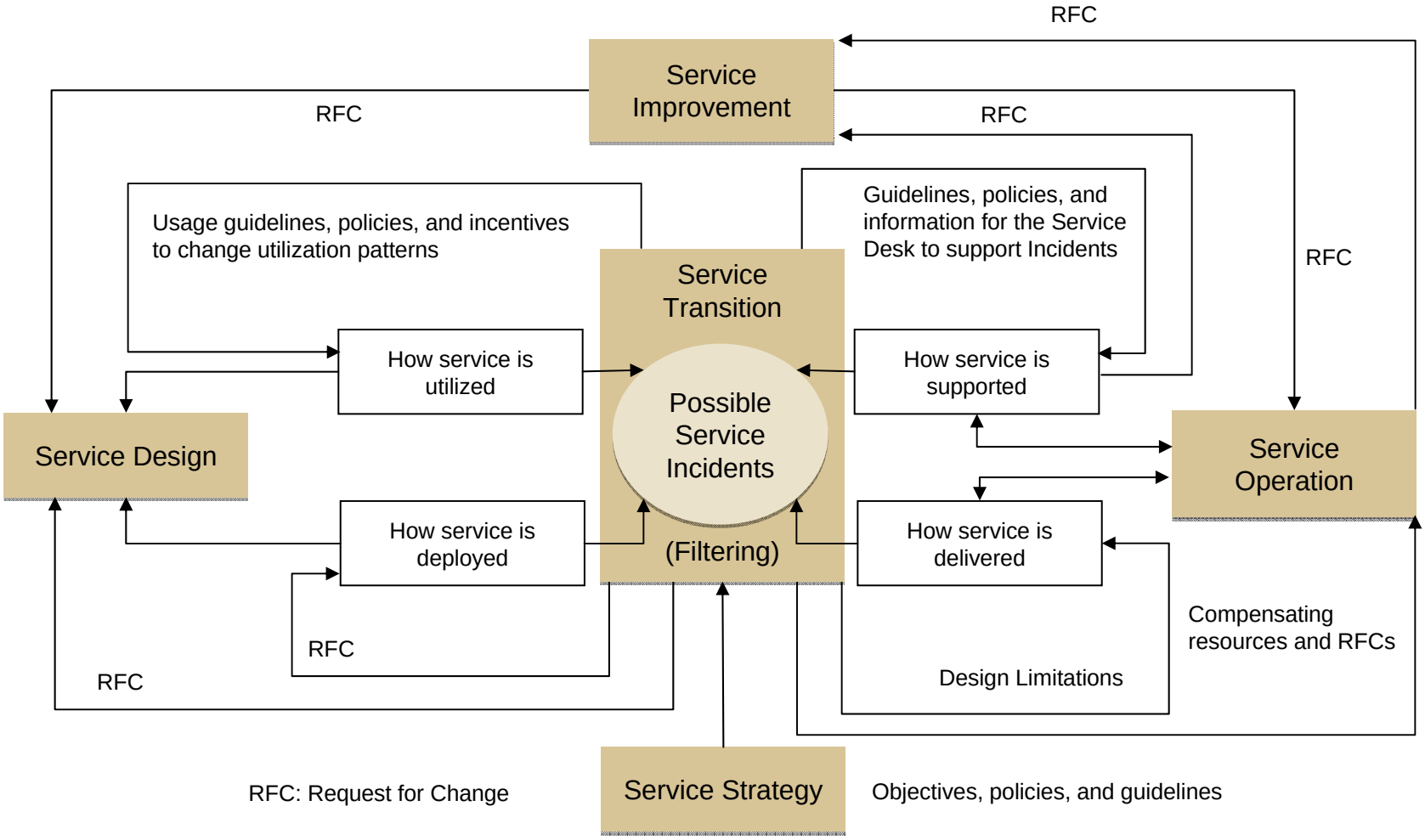
- Continual Service Improvement (CSI) is instrumental guidance in creating and maintaining value for customers through the better design, introduction, and operation of services.
- CSI is not a phase of the Lifecycle because it has a role throughout the Lifecycle.
- The primary purpose of CSI is to continually align and realign IT services with changing business needs by identifying and implementing improvements to the IT services that support business processes.
- There are three main areas that CSI needs to address:
  - The overall health of ITSM as a discipline
  - The continual alignment of the portfolio of IT services with the current and future business needs
  - The maturity of the enabling IT processes for each service in a continual Service Lifecycle model

CSI - Continued

Description

- CSI includes the 7-Step Improvement Model process.
- CSI also includes these processes:
  - Service Reporting
  - Service Measurement
  - Return on Investment for CSI

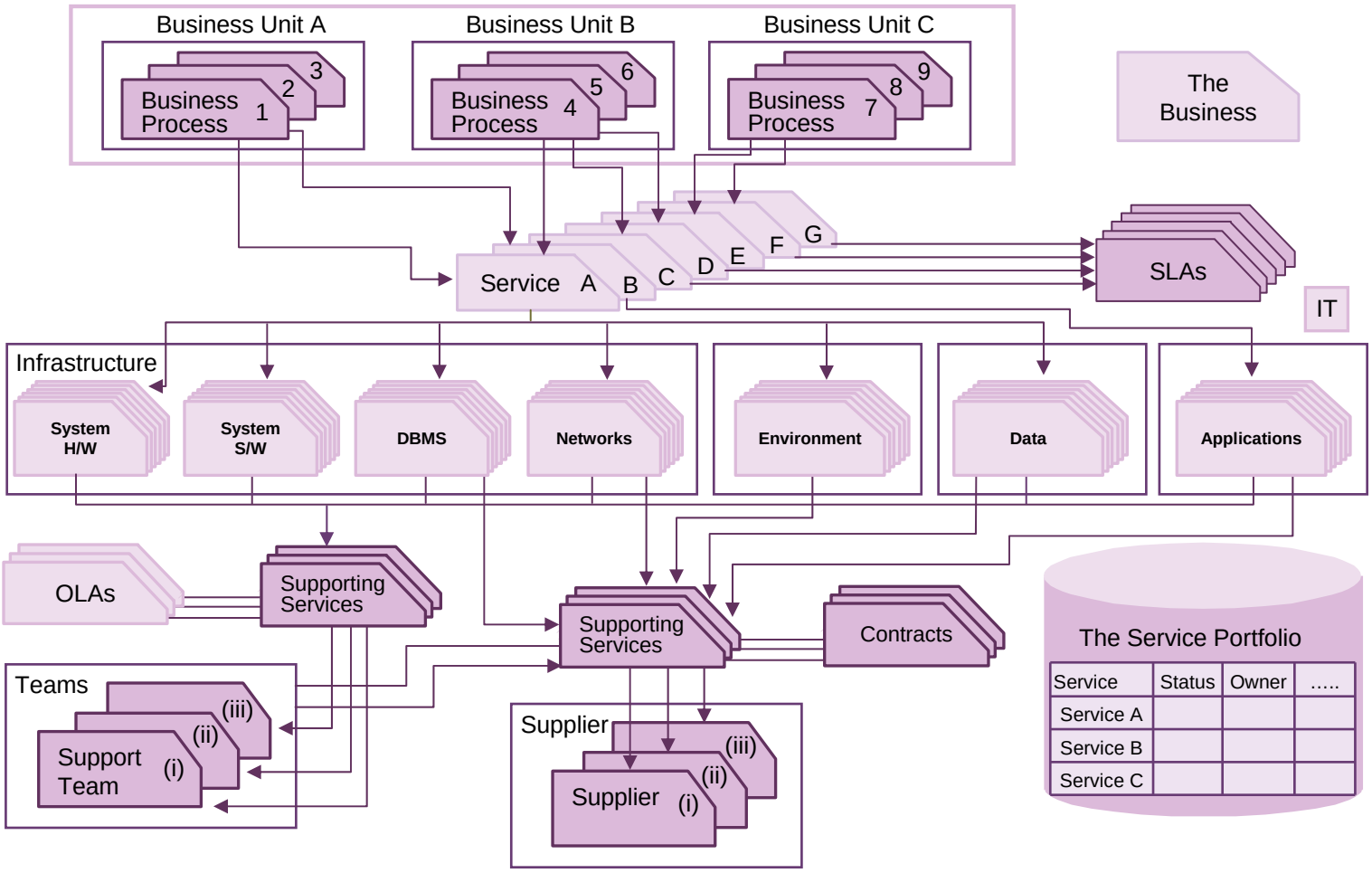
Service Management Map



Life Cycle Processes

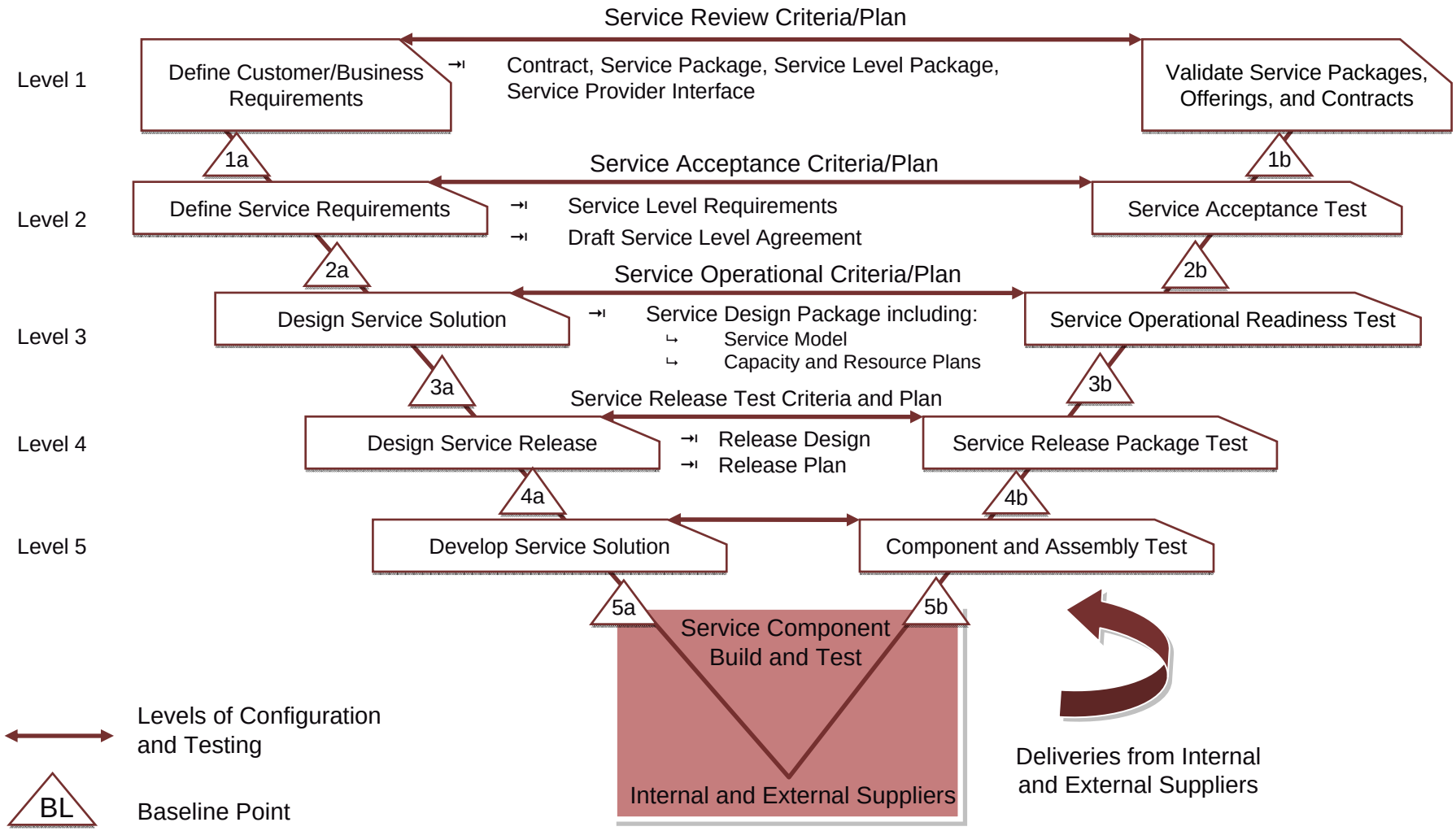
v3 Process Covered in Foundation Course Material		Service Strategy	Service Design	Service Transition	Service Operation	Continual Service Improvement
Service Strategy	SS					
Financial Management	SS					
Service Portfolio Management	SS					
Demand Management	SS					
Service Level Management	SD					
Service Catalogue Management	SD					
Availability Management	SD					
Capacity Management	SD					
Information Security Management	SD					
Service Continuity Management	SD					
Supplier Management	SD					
Change Management	ST					
Service Asset and Configuration Management	ST					
Release and Deployment Management	ST					
Event Management	SO					
Incident Management	SO					
Request Fulfillment	SO					
Problem Management	SO					
Access Management	SO					
The 7-Step Improvement Model	CSI					

Central Repository

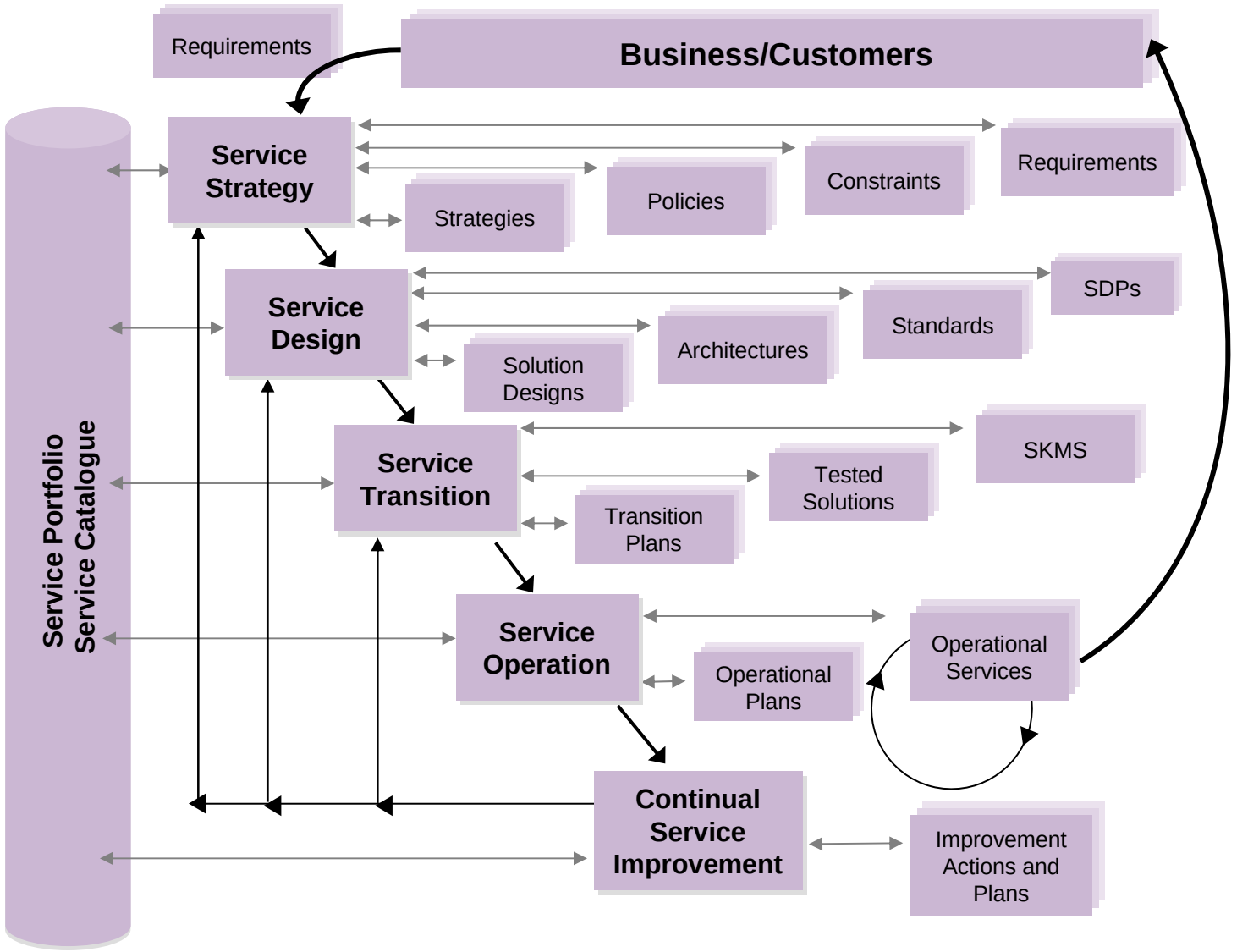


The Service V Model

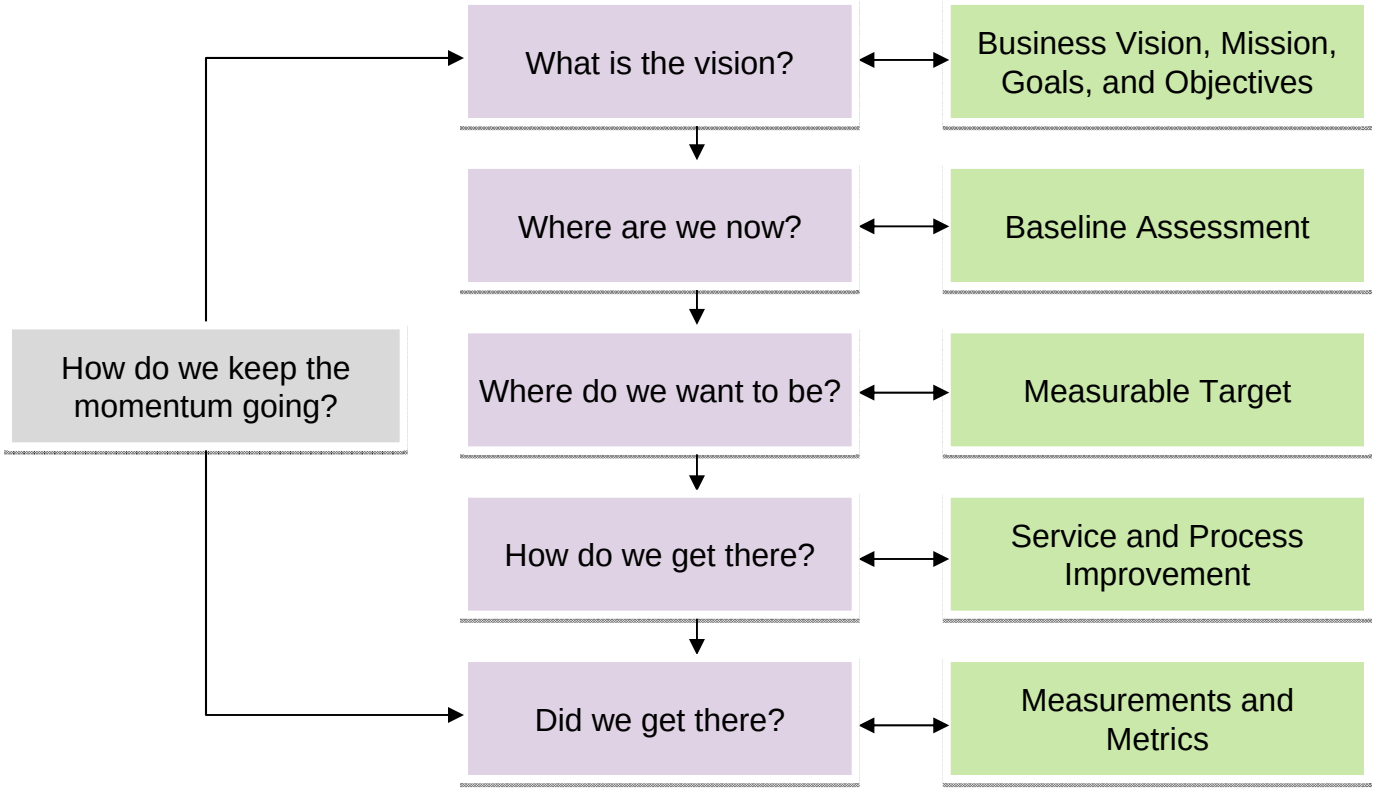
Using a model such as the Service V-Model builds in service validation and testing early in the service Lifecycle.



CIS in the Lifecycle

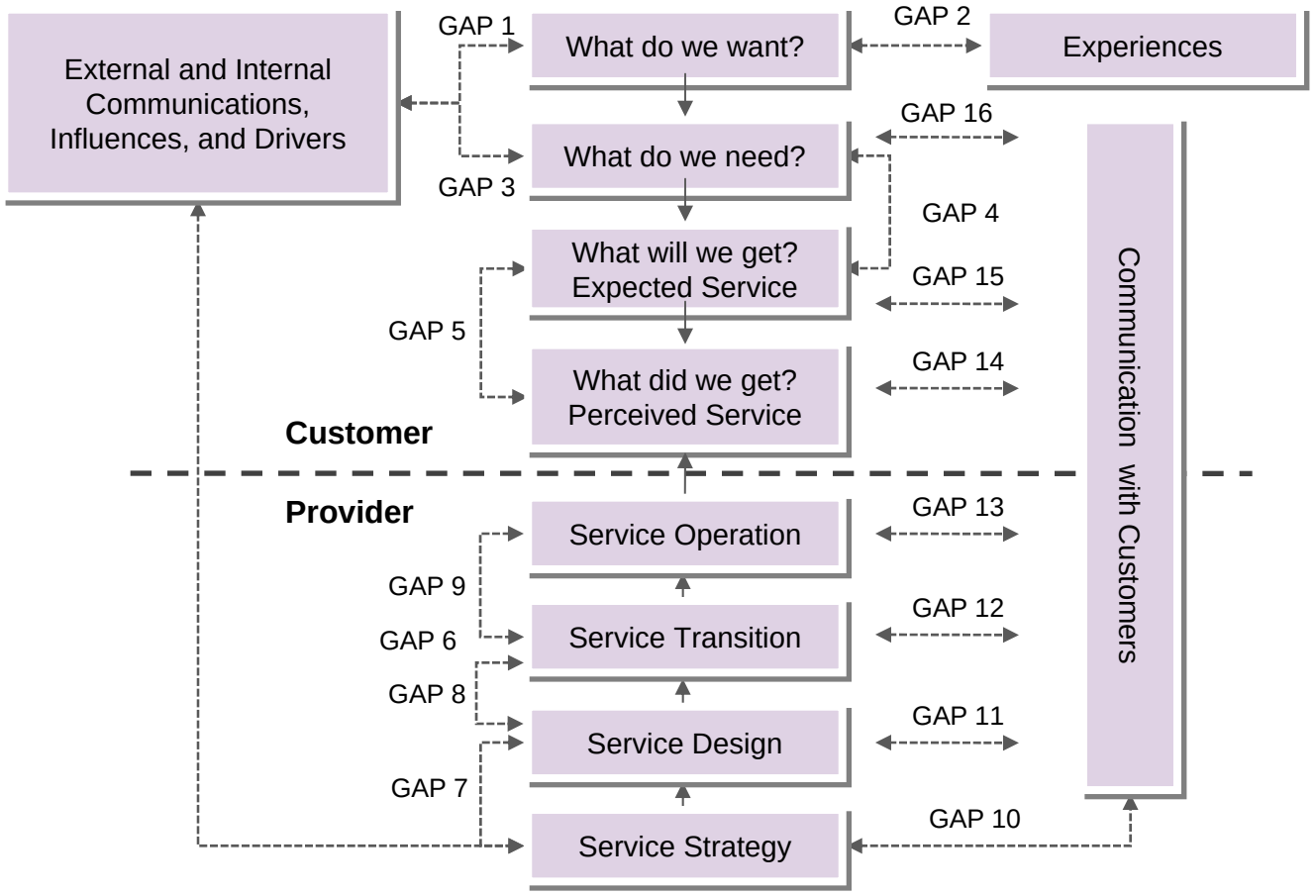


Transitioning



The Service Gap Model

The following figure identifies the most obvious potential gaps in the Service Lifecycle from both a business and an IT perspective:



Measurements

Consider the following saying about measurements and management:

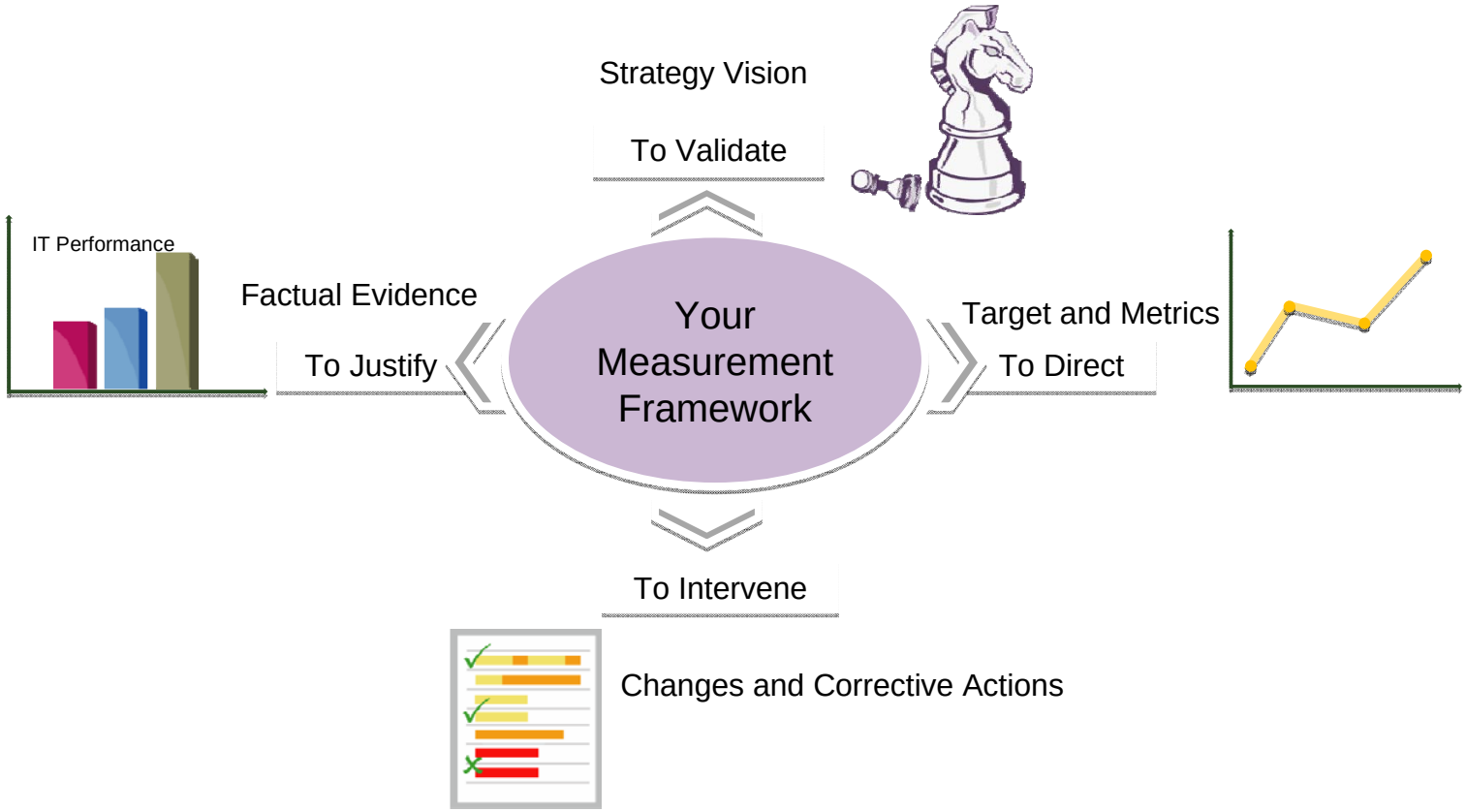
"You cannot **manage** what you cannot **control**.

You cannot **control** what you cannot **measure**.

You cannot **measure** what you cannot **define**."

The Role of Measurement

These four factors monitor and measure business value:



Balanced Score Card

Scorecards

Financial

How do shareholders look at us?

(For example, delivery against the budget)

Customer

How do customers see us?

(For example, customer satisfaction, on-time delivery, and service value)

Internal Process

How do we judge ourselves?

(For example, process orientation and quality)

Learning/Innovation

Can we continue to improve and create values?

(For example, employee knowledge and technical infrastructure)

Why Change?

Service Automation — Then And Now

Gas Station

How has filling up gas at the corner station changed in the past 10 years?

ATM

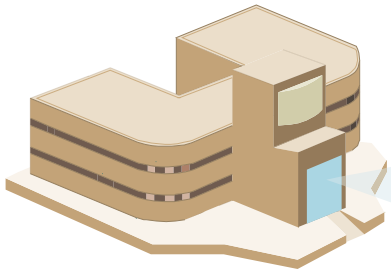
How has ATM banking changed in the past 10 years?

Airport Check-In

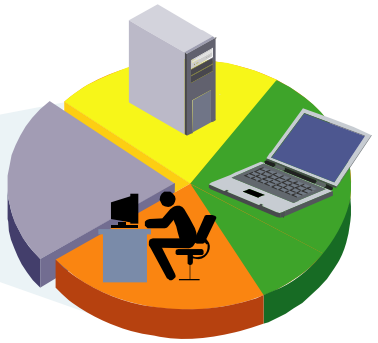
How has checking in for your flight at the airport changed in the past 10 years?

The Challenges

- Keeping IT Running
- Value
- Costs
- Mastering Complexity
- Aligning IT With Business
- Regulatory Compliance
- Security



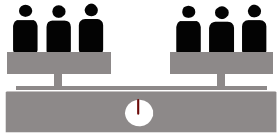
Organization



IT Resources and Expenses

IT Governance

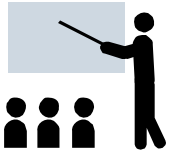
Strategic Alignment



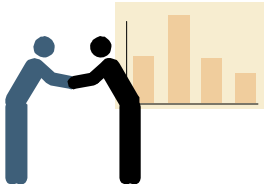
Value Delivery

Risk Management

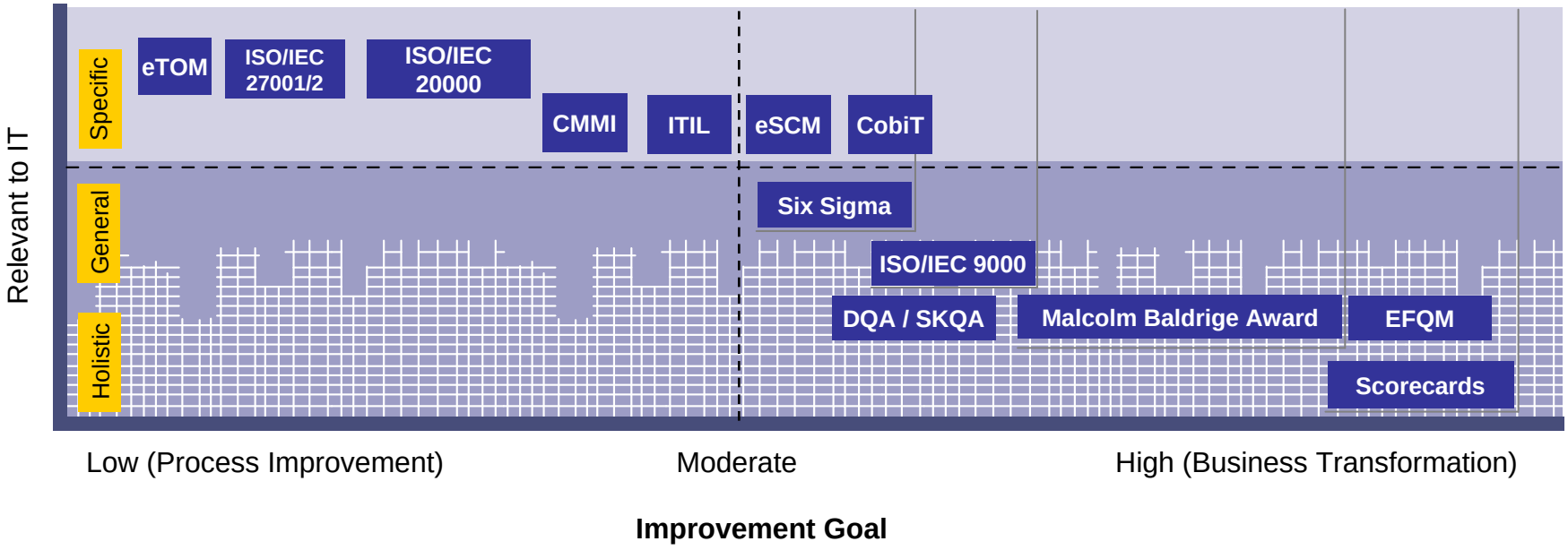
Resource Management



Performance Measurement



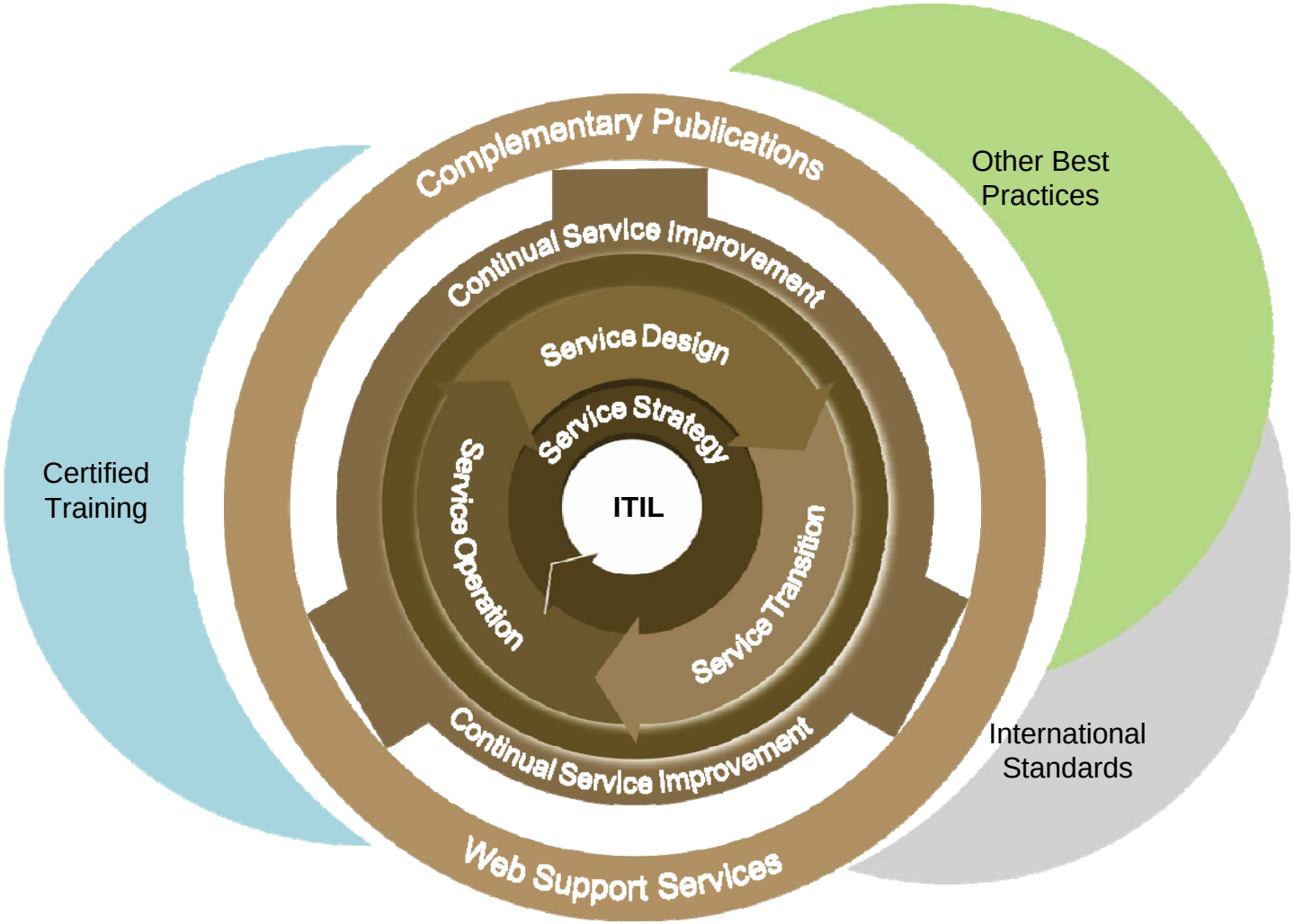
Standards and Frameworks



Summary

- Understand where you are today
- What are the business drivers
- What are the IT drivers
- Plan for organizational transformation
- Plan for people transition
- Plan to celebrate

Questions?



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