



MISA BC Fall 2004 Conference
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The Theme of the 2004 Conference:
"Climb Your Own Mountain"

Best Practices When Implementing ITIL

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Best Practices When Implementing ITIL

... including an introduction to IT Service Management

Session Outline:

- Introduce IT Service Management and its benefits
- Review the origins and core values of the Information Technology Infrastructure Library (ITIL)
- Review the ITIL IT Service Management Framework
- Guide to developing a Service Management strategy
- Detail the ingredients of a successful ITIL implementation from a best practices approach
- Realistic guidelines to your implementation timetable
- Tips on how to best get started

IT Service Management

IT Service Management addresses the provision and support of IT services tailored to the needs of the organization:

- An IT Service is a set of related components provided in support of one or more business processes
- The service should be perceived by Customers and Users as a self-contained, single coherent entity

- Most organizations depend on IT - ignore IT services and the organization suffers
- IT Service Management is about managing the responsibilities within the value chain, not about particular organizations
- Everyone in IT works in IT Service Management
- For an IT services supplier, IT Service Management is all there is!

Goals of IT Service Management

- Meet the current and future needs of the Customer
- Continuously improve the quality of IT services
- Reduce IT service costs over the long-term



Benefits of IT Service Management

- Service consistency and stability – repeatable processes
- Improved customer and user satisfaction
- Clear responsibilities and authorities
- An infrastructure under control
- Efficient use of resources – IT and the Customers'
- Significant TCO reductions
- Long-term survival (?)

Information Technology Infrastructure Library (ITIL)

What is ITIL?

- The **Information Technology Infrastructure Library (ITIL)** is the most widely accepted approach to IT Service Management in the world
- ITIL provides a comprehensive, consistent and coherent set of best practices for IT Service Management, promoting a quality approach to achieving business effectiveness and efficiency in the use of information systems
(ITIL website)
- ITIL takes the form of multiple books/CD-ROMs which describe each 'set' of best practices

The Origin of ITIL

- Originally developed in the 1980s by the British government's Central Computer and Telecommunications Agency (CCTA) with public and private sector contributions, published by the UK Office of Government Commerce and British Standards Institution
 - *(Note: ITIL® is a registered trade mark of OGC)*
- Updated and expanded in 2001
- The basis of the world-wide standard for quality IT Service Management: BS 15000 : 2000
- Technology and vendor independent
- In the public domain
- Provides common language

From the ITIL web site:

The ethos behind the development of ITIL is the recognition that organisations are becoming increasingly dependent on IT in order to satisfy their corporate aims and meet their business needs ... this leads to an increased requirement for high quality IT services

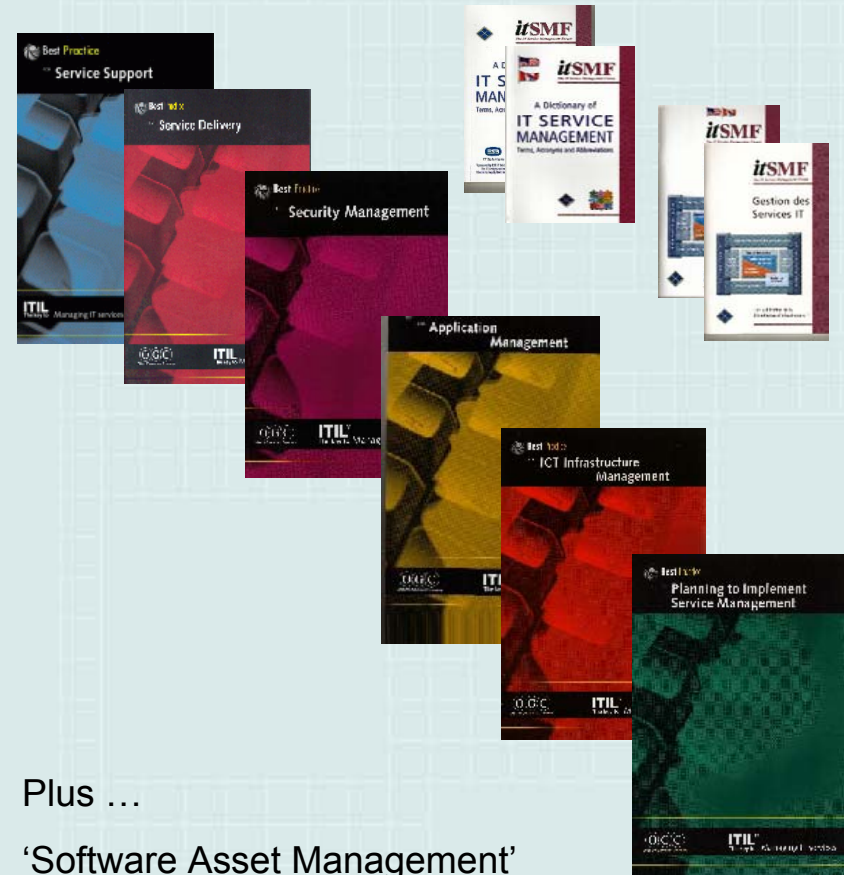
The codes of practice are intended to assist organisations to provide quality IT service in the face of challenges such as budgetary constraints, skill shortages, system complexity, rapid change, current and future user requirements and increased user expectations

What Was ITIL Designed To Be?

- ITIL is not ...
 - A method (or a methodology)
 - Complete in every respect ... nor entirely consistent
 - Prescriptive?
- But ITIL is ...
 - A set of books describing the successful practical experiences of a wide range of ITSM professionals
 - Advisory – for consideration
 - A library that describes the elements of IT Service Management without clearly describing IT Service Management itself!

Core Values of ITIL

- Non-proprietary
- Wide audience
 - IT and non-IT
 - Internal and external
 - Top and bottom
 - Large and small
 - Centralized and distributed
- Not how but what – a process-based approach to IT Service Management
- Customer needs and viewpoint is paramount



Plus ...

‘Software Asset Management’

‘The Business Perspective’

Various other Pocket Guides and Dictionaries

ITIL IT Service Management Framework

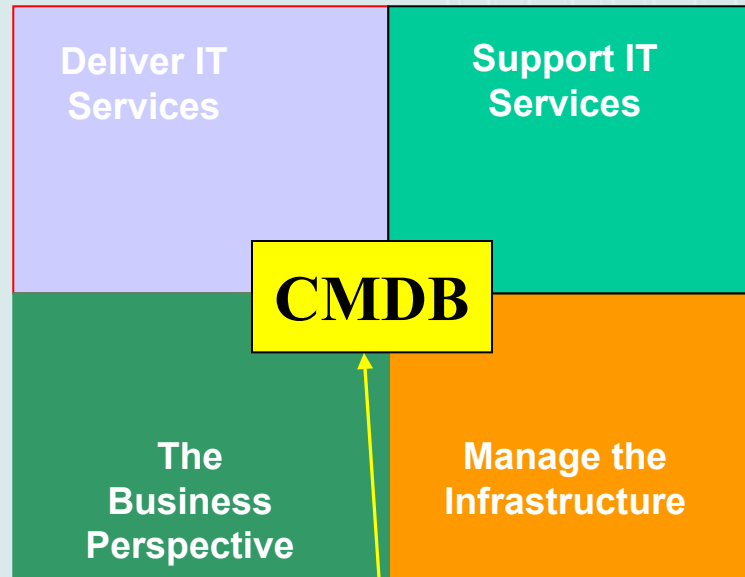
ITIL IT Service Management Schema



The Multiple Volumes of ITIL

- Capacity Management
- Financial Management
- Availability Management
- Service Level Management
- IT Service Continuity Management

- Service Desk
- Incident Management
- Problem Management
- Change Management
- Release Management
- Configuration Management

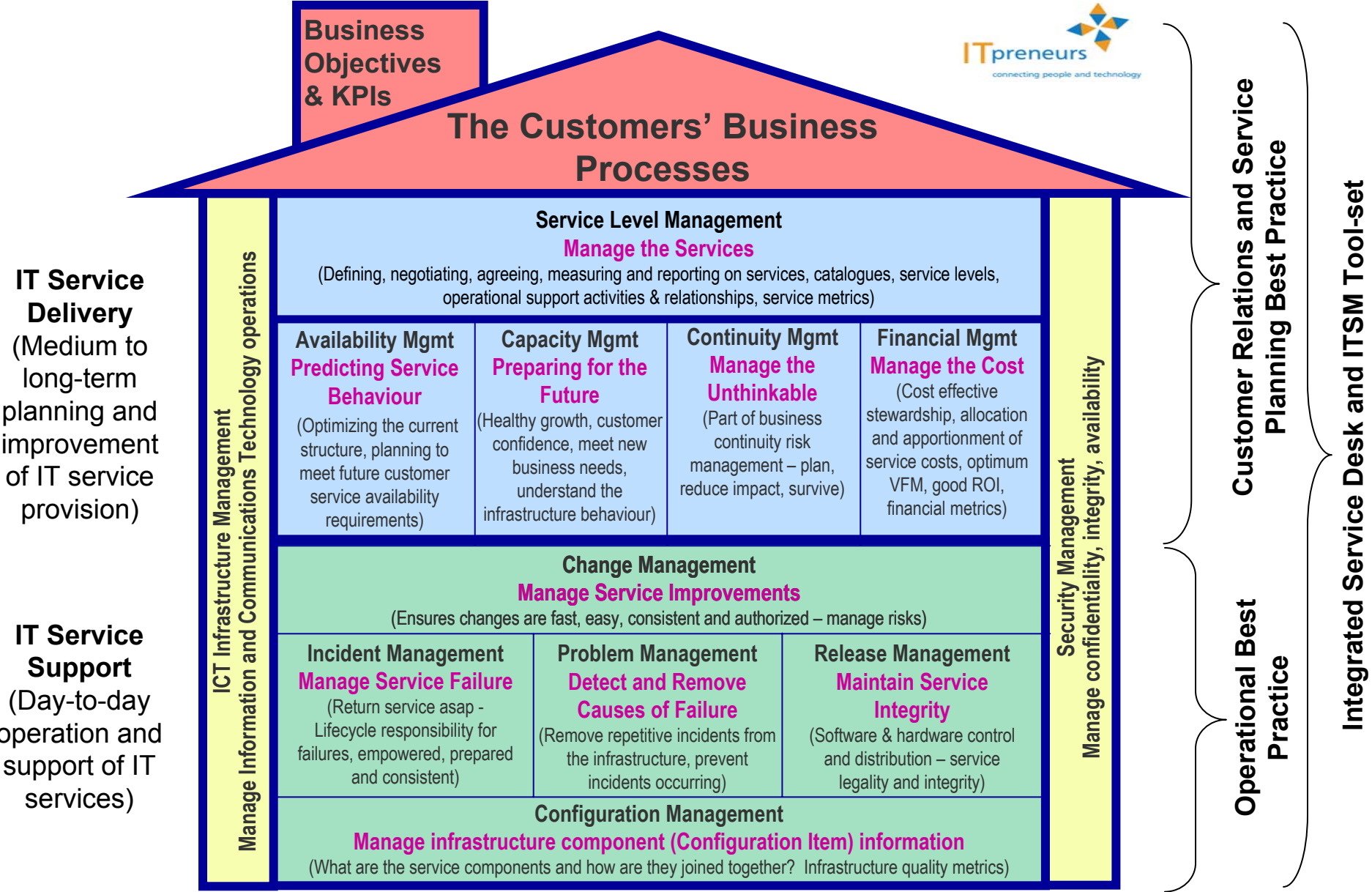


- Business Continuity Management
- Partnerships and Outsourcing
- Surviving Change
- Transformation of Business Practice through radical change

- Network Service Management
- Operations Management
- Management of Local Processors
- Computer Installation and Acceptance
- Systems Management

- AD lifecycle
- Software Lifecycle Support
- Testing of IT Services
- Requirements Definition
- Implementation Planning

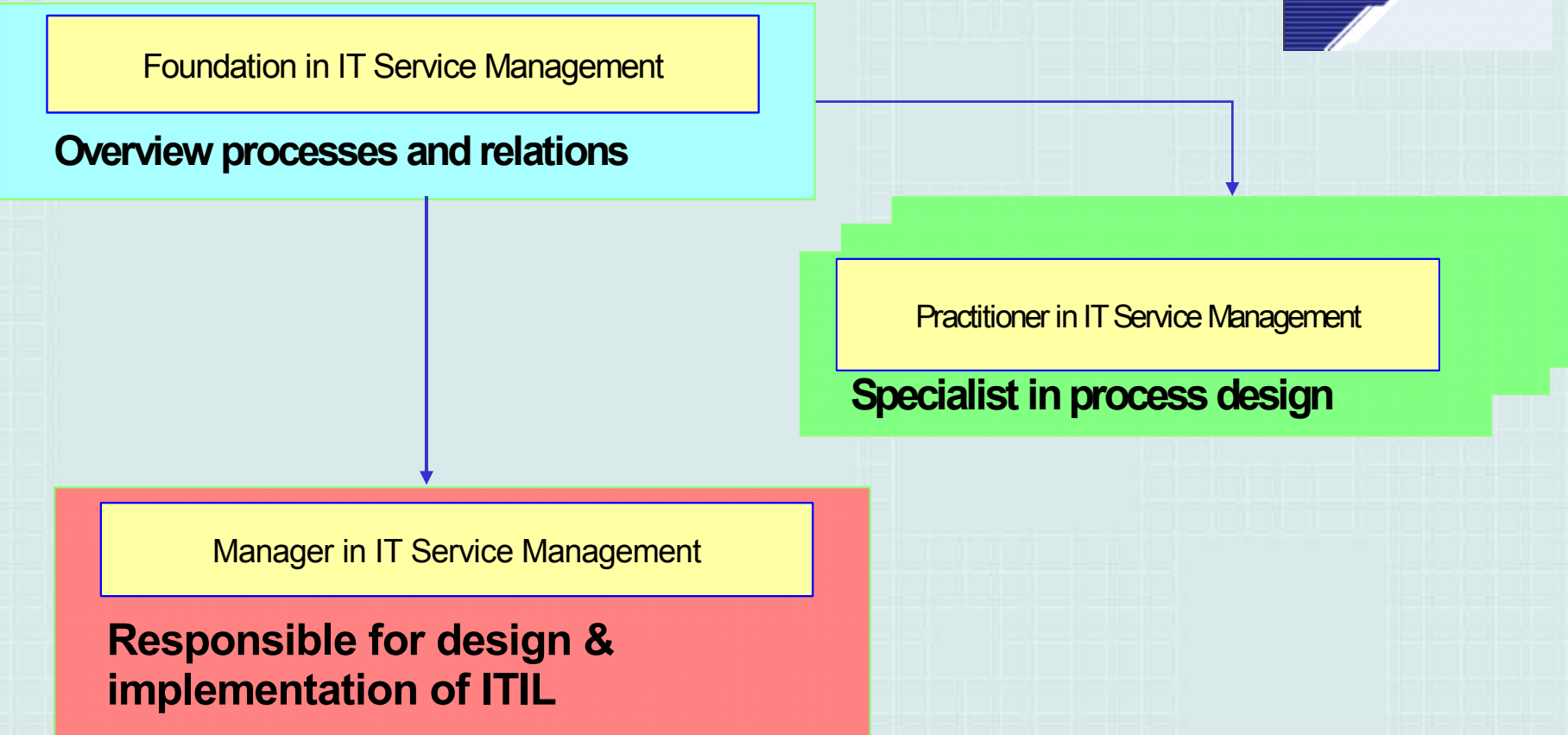
The Service Management House



ITIL Accreditations



The ITIL Certificates





Which tools are compatible to ITIL?

- From the guidance contained in ITIL, as well as Pink Elephant's ITIL subject matter experts, Pink Elephant has collated the minimum functional requirements necessary for how a software tool should support the ITIL framework. The results are embodied in a new service - PinkVerify™.
- If you see the PinkVerify™ logo associated with any specific IT Service Management software toolset, it means that it has been objectively assessed according to the criteria specified by the OGC and certified by a qualified Pink Elephant IT Service Management Consultant, as meeting the minimum functional requirements to support the ITIL framework.



creating advantage

BS 15000-1:2002

- BS 15000 is a standard setting out the requirements for an IT Service Management System. It helps identify and manage the key processes involved in delivering effective IT services which meet the needs of the business and the customer.
- The standard is based on the best practice foundation of the IT Infrastructure Library (ITIL). BS 15000 introduces a service culture and provides the methodologies to deliver services that meet defined business requirements and priorities in a manageable way. It also:
 - Specifies a number of closely related service management processes
 - Identifies that relationships exist between these processes, and that these relationships will be dependent on their application within an organization
 - Provides guideline objectives and controls to enable an organization to deliver managed services
- An organization using BS 15000 as the basis for its ITSMS, can become registered by BSI, thus demonstrating to stakeholders that the ITSMS meets the requirements of the standard.

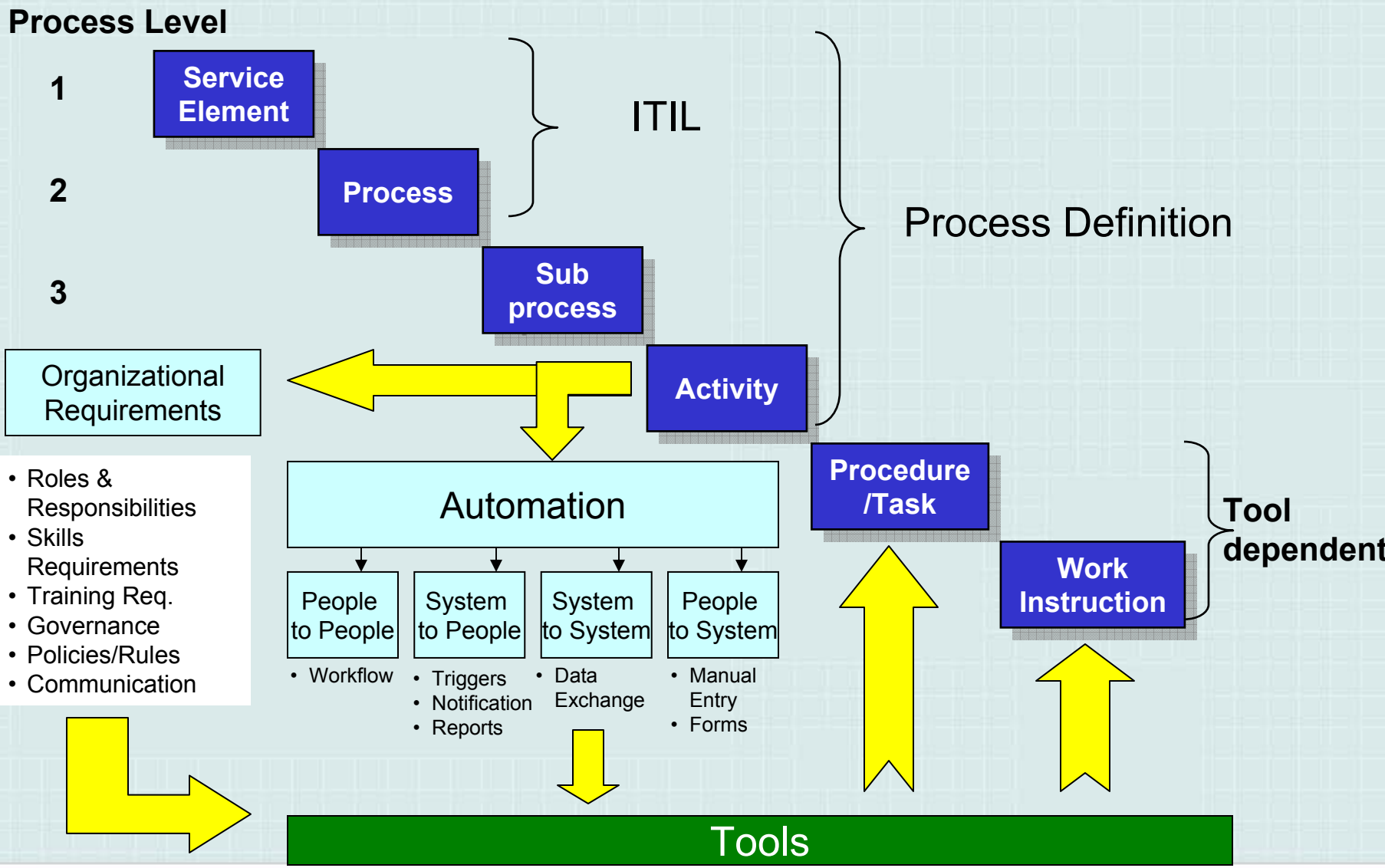
IT Service Management Forum

itSMF

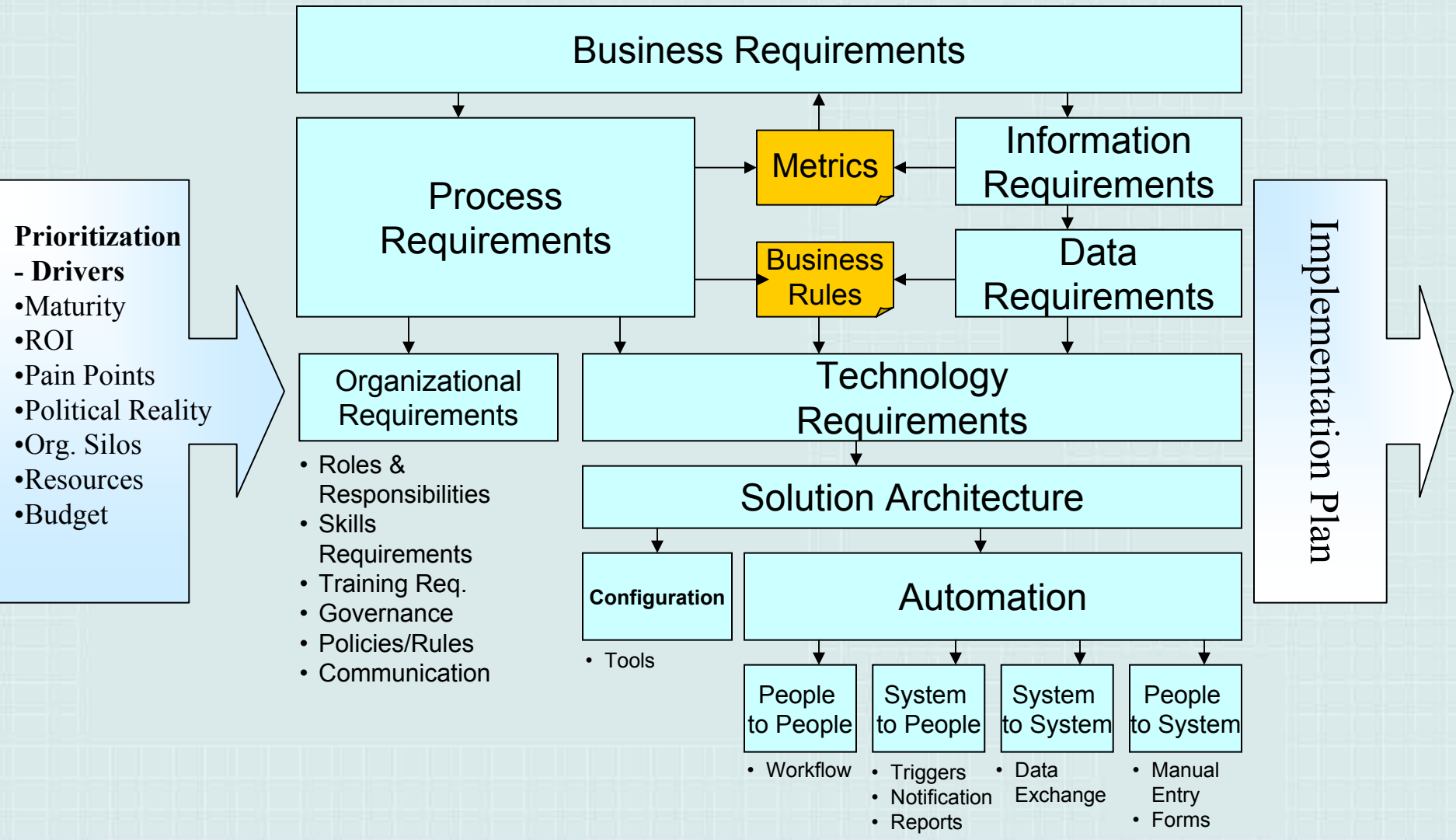
- *itSMF* represents IT Service Management professionals world-wide
- *itSMF* is a not-for-profit organization, wholly owned by its members and principally operated by its membership
- *itSMF* is independent of institutions, companies or products
- *itSMF* is a major influence on and contributor to industry best practices and standards in IT Service Management
- *itSMF* Canada web site is www.itsmf.ca 
- *itSMF* BC web site is bc.itsmf.ca (next meeting October 7)

How to Develop a Service Management Strategy

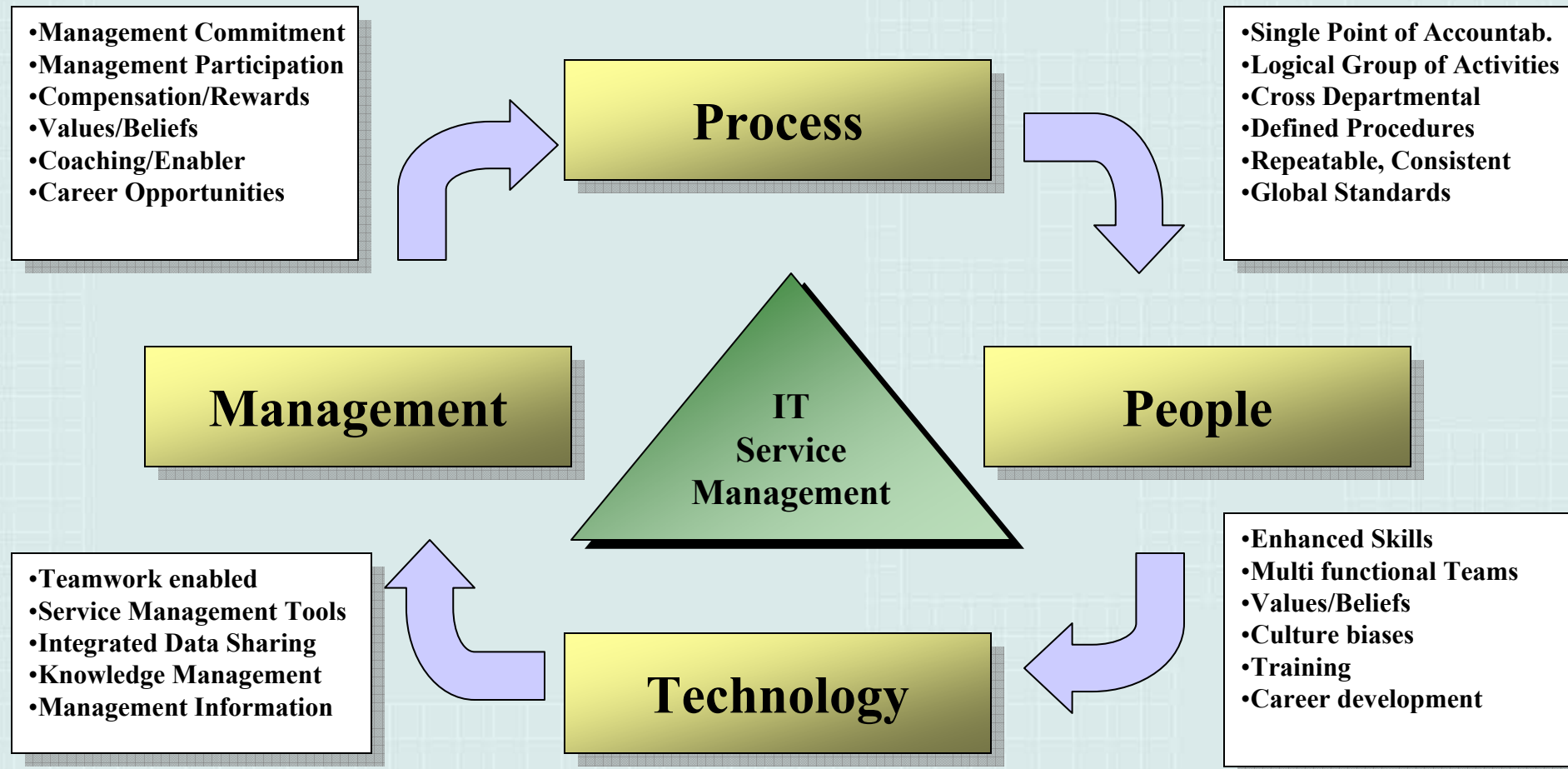
ITSM Implementation Layers



ITSM Implementation Framework

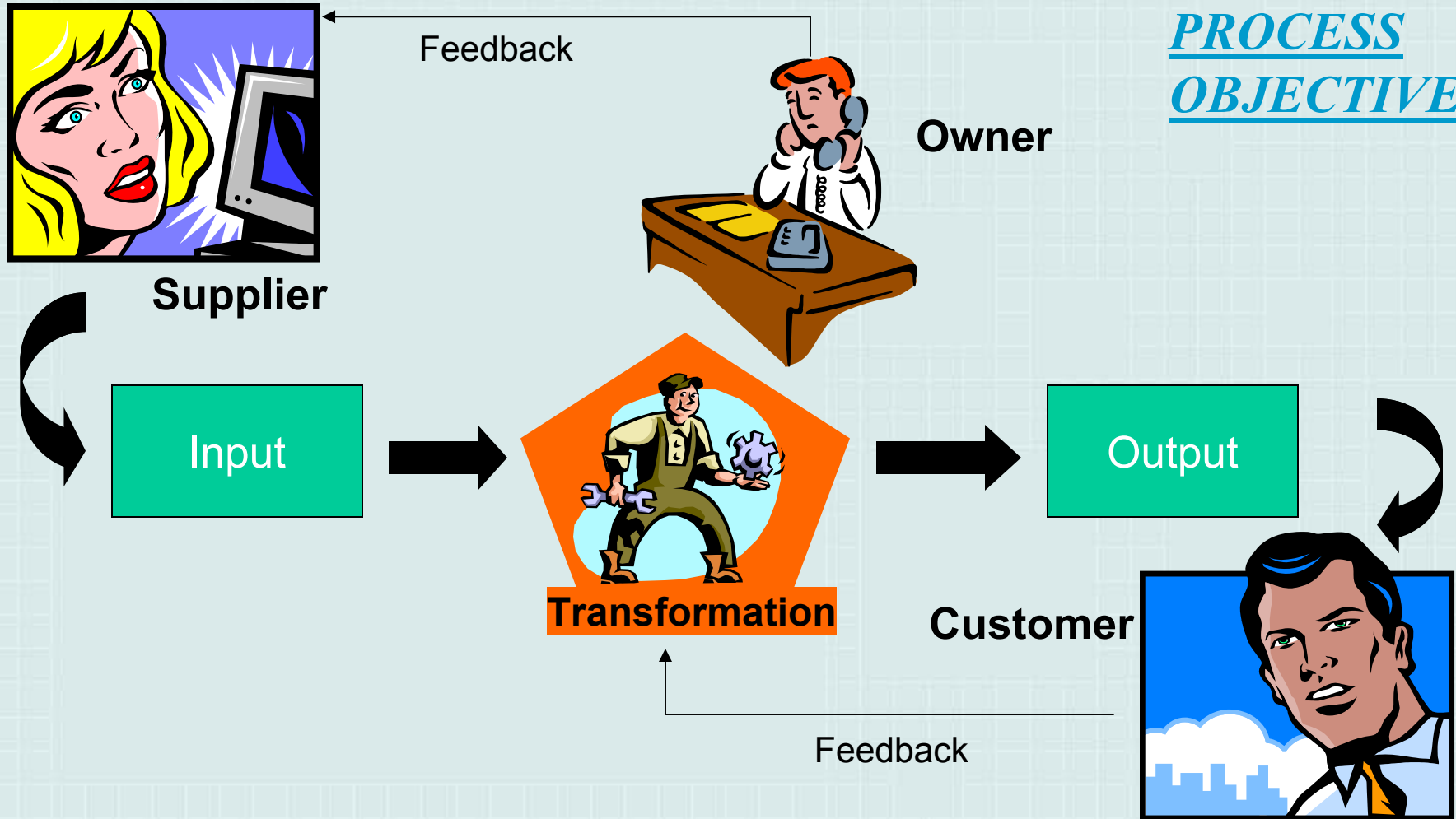


Service Management is a Journey not a Project



Process Components

PROCESS
OBJECTIVE



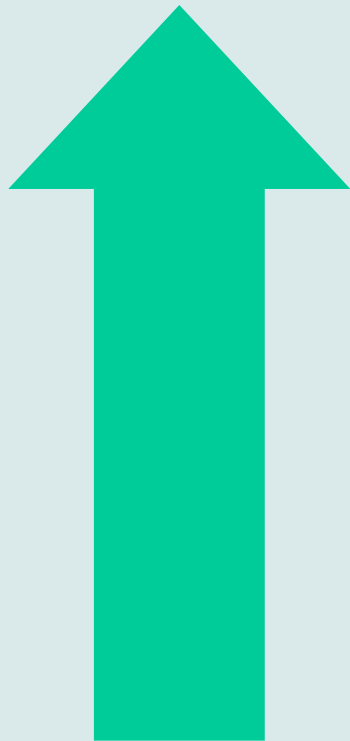
Process Maturity Models, Quality Models, Governance Models and more ...

Carnegie Mellon University Software Engineering Institute

- CMMI® Staged and Six Sigma
(slide deleted pending permission to re-use)

Carnegie Mellon University Software Engineering Institute

- CMMI® Results Study Framework
(slide deleted pending permission to re-use)



Excellence

Problem? What problem?

Predictability

Our solution is flexible and demonstrably works.

Solution

We've got a solution for that problem.

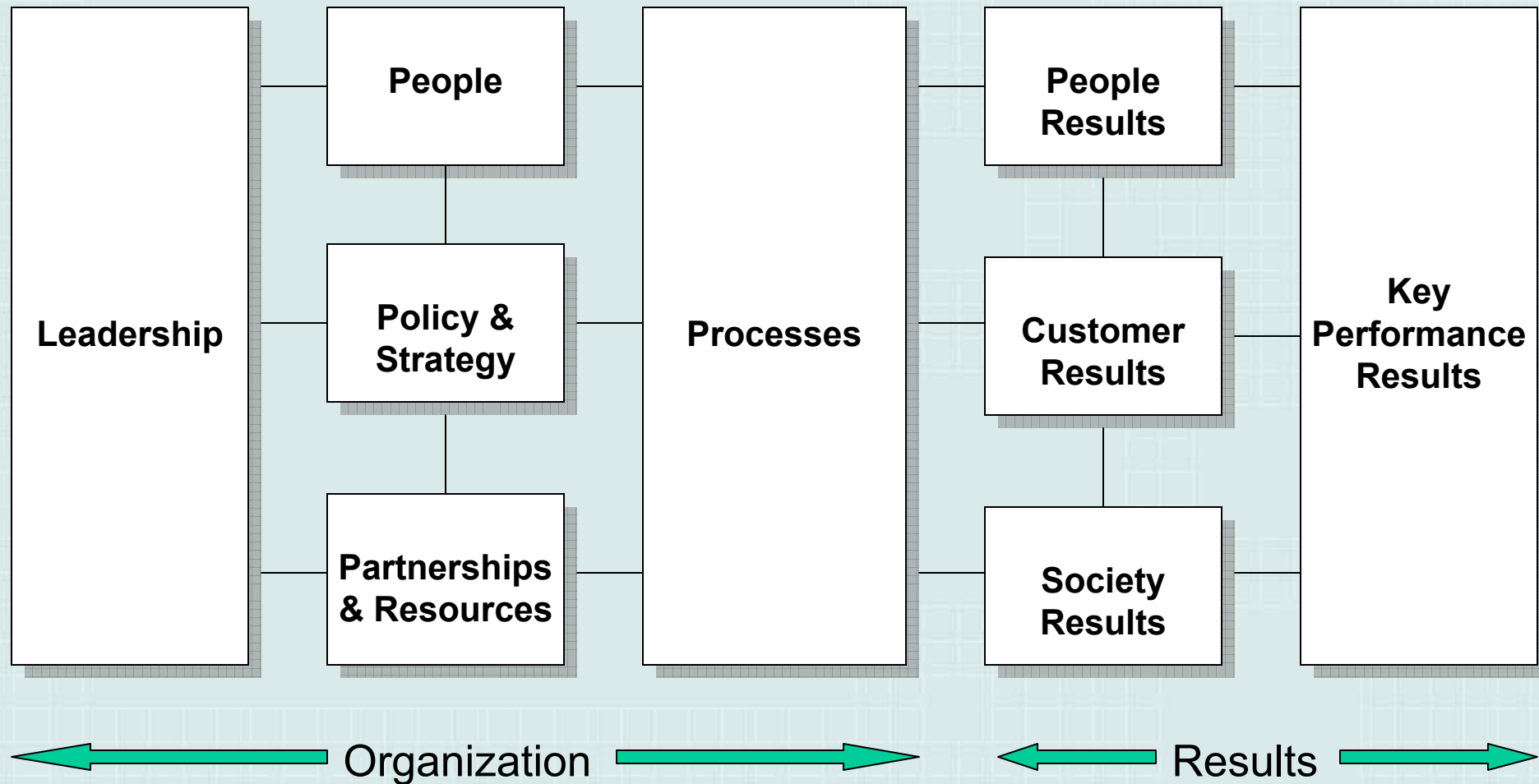
Recognition

Oh, that problem!

Innocence

Problem? What problem?

European Foundation for Quality Management





ITIL Mapped To COBIT Processes and Domains

	1	2	3	4	5	6	7	8	9	10	11	12	13
PO	-	-	+	+	+	-	-	-	-	+	-		
AI	+	+	+	+	+	+							
DS	+	+	+	+	+	+	-	+	+	+	+	+	+
M	-	-	-	-									

COBIT Domains

PO - Plan and Organize

AI - Acquire and Implement

DS - Deliver and Support

M - Monitor and Evaluate

COBIT Processes

(+) Addressed

(-) Not or Rarely addressed

() no process for that domain

COBIT Mapping: Overview of International IT Guidance

The Ingredients of a Successful ITIL Implementation

- **It is about human beings**
 - FUD
 - Resistance to change
 - It takes time
 - Create Opportunities
- **Communication**
 - Communicate, Communicate, Communicate
 - Plans, Activities, Successes!
- **HR involvement**
 - Communication
 - Job Descriptions, Skills Profiles, Job Goals, Compensation/Bonus Plan
 - Selection / Severance Processes

- **Keep it simple**
 - “Process drives organization”
 - It is all about responsibility - no responsibility without empowerment/privileges
 - Nominate key process owners according to your strategic implementation plan
 - Service Manager, Service Level Manager, Change Manager, Configuration Manager
 - Matrix Organization

Implementation Approaches:

➤ **Single Process Approach**

- Problem Management
- Configuration (IT Asset) Management
- Change Management
- Service Level Management
- Etc.

Implementation Approaches:

➤ Multi-Process Approach

- The Continuous Service Improvement Program (CSIP)
- Customer Satisfaction Surveys /Business Impact approach
- SWOT Analysis approach
- Benchmark approach
- Service Target approach

Implementation Approaches:

➤ All-Processes Approach

- Taking small steps in all processes concurrently
- Driven by:
 - Business/IT strategy and vision
 - Continuous Service Improvement Program
 - Benchmark

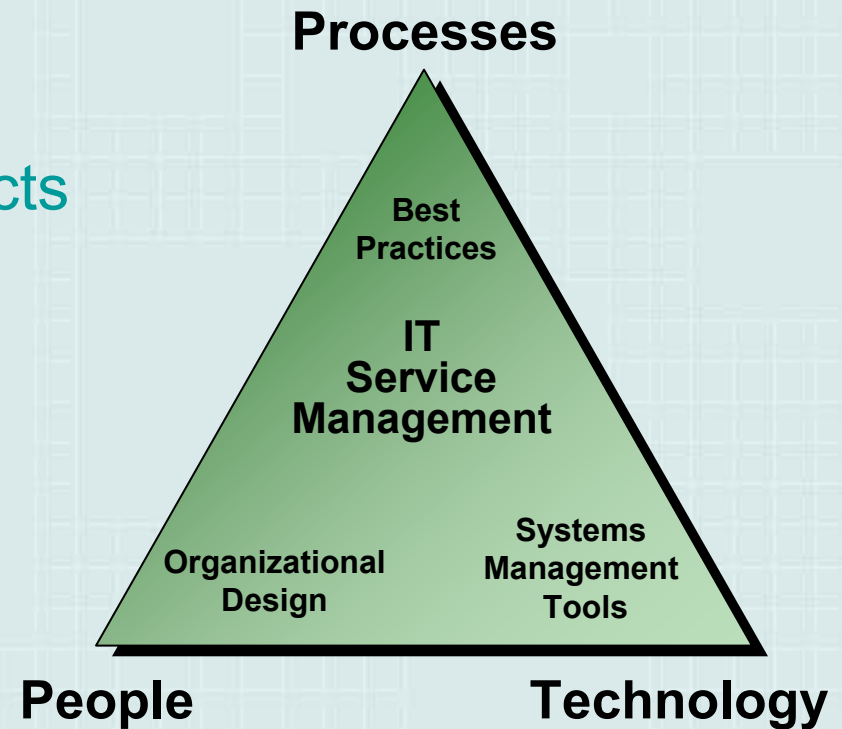
Which approach to choose depends on:

- the senior management commitment
- the allocated budget
- resource availability
- the skills and knowledge within the organization
- the culture and organizational structure
- the business and IT vision and strategy
- the tools and technology
- the demands for “business as usual”

Don't: Stealth Approach

Best Practices Suggest ...

- Plan strategically – implement tactically
- Establish baseline with an IT Service Management assessment
- Define a strategic IT Service Management Roadmap
- Develop an Implementation program of independent projects with individual ROI
- Change your organization as you go
- Always think in 3 dimensions of implementation



3 Keys to a Successful ITIL Implementation

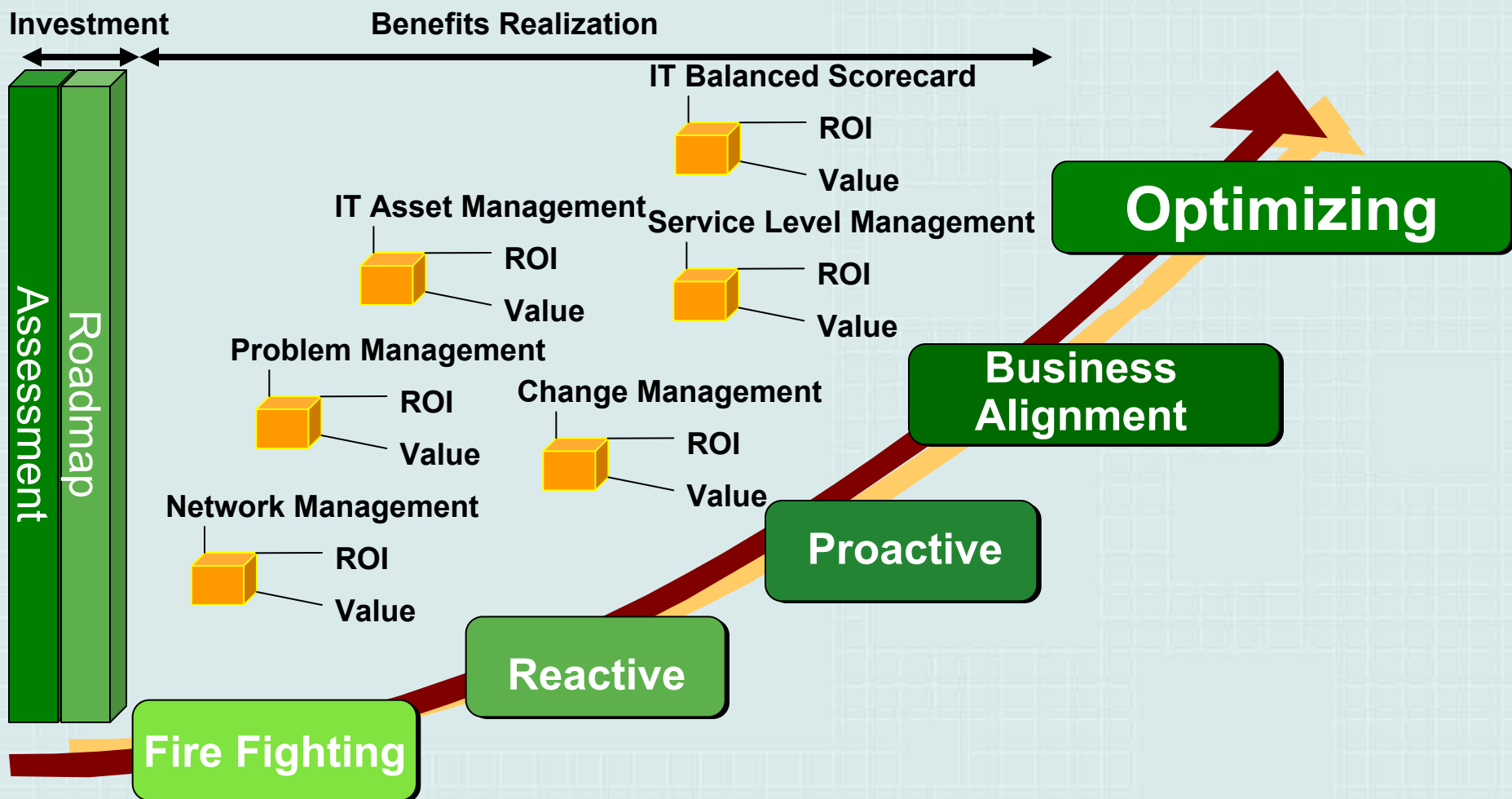
3 Keys to a Successful ITIL Implementation

- ✓ Keep it simple
- ✓ Have a plan
- ✓ Process before tools



- Set a clear vision that is driven by business goals
- Prioritize
 - Pain points
 - Opportunities
 - Control
- People, Process, Technology
- Key success factors

Have a Plan



- Tools do not necessarily drive or enforce processes, tools support processes with automation and knowledge management
- *A perfect process with no tools is better than the best tool with no process*

A fool with a tool is still a fool...

- Pilot Projects
- Staging
- Competency Centres
- Quick Wins
- Program Office / Project Management
- Driven by central IT
- Beware typical implementation issues
 - Avoid over-emphasis on tools
 - Avoid too high expectations and over-ambitious plans
 - Address lack of skills

Before You Start

At the Strategic Level

- Uncertain ROI
 - No baseline
 - Too long payback time
- Most IT departments operate still in 'adrenalin' or 'reactive' mode
 - Organizational Silos (UNIX, Windows, Network, Applications etc.)
 - No strategic IT processes defined
 - No process skills
- Lack of know-how in IT departments
 - Lack of Management Capacity
 - Lack of Project Management Skills
 - Lack of Technical Skills (ESM Tools)
- Lack of Resources
 - IT departments can not free up enough resources to drive major change initiatives
 - IT budget constraint, investments tied to clear ROI and Business Value

At the Tactical Level

- Over-engineered solutions
- “Only tools approach” – no service or process orientation
- Business and IT does not understand its new roles (7x24h, SLA)
- All issues at once, no priorities
- No integrated view (piece work)
- Does not match incentive model
- Not supported by IT governance

*“Organizations attempting to make traditional, incremental changes to their processes, using the CMM or another model, are likely to find that the playing field will substantially change before they can realize any real benefits. Radical, rapid change is crucial to success; **incremental, unfocused changes have a better than 50 percent chance of failure** - defined, in this case, as a significant waste of time, effort and, most of all, money”*

Source: Gartner Group, 2001

- **ITIL implementations require time and resources**
- **They take place in an ever changing business and IT environment**
- **ITIL implementations have to return value in a short time**

- Don't do ITIL for ITIL's sake!
 - ITIL is not a goal, but an enabler
- ITIL is about customer-focus
 - Make IT more responsive to customers' needs

- Select business relevant goals
 - Efficiency
 - Reduce Cost
 - Improve performance
 - Improve response time
 - Improve service delivery time
 - Expand service portfolio
 - Consolidate data centres
 - Effectiveness
 - Improve customer satisfaction
 - Improve time to market
 - Adjust Service Portfolio
 - Support/Initiate innovation
 - “Trusted advisor” to business
 - Mergers & Acquisitions

- Translate into Key Success Factors
 - e.g. “Improve time to market”
 - Robust Change and Release Management Processes
 - Integrate strategic IT planning with Service Level Management
 - Introduce new SLA’s for Service Provisioning
- Translate KSF’s into Metrics
 - # of changes per month
 - Meantime of change execution
 - # of emergency changes
 - Defined Process Interfaces between Planning and SLM
 - Time between Strategic Plan creation and Service Catalog update
 - # of SLA’s for Service Provisioning

Tips on Getting Started

***“It is best to do things systematically,
since we are only human and disorder
is our worst enemy.”***

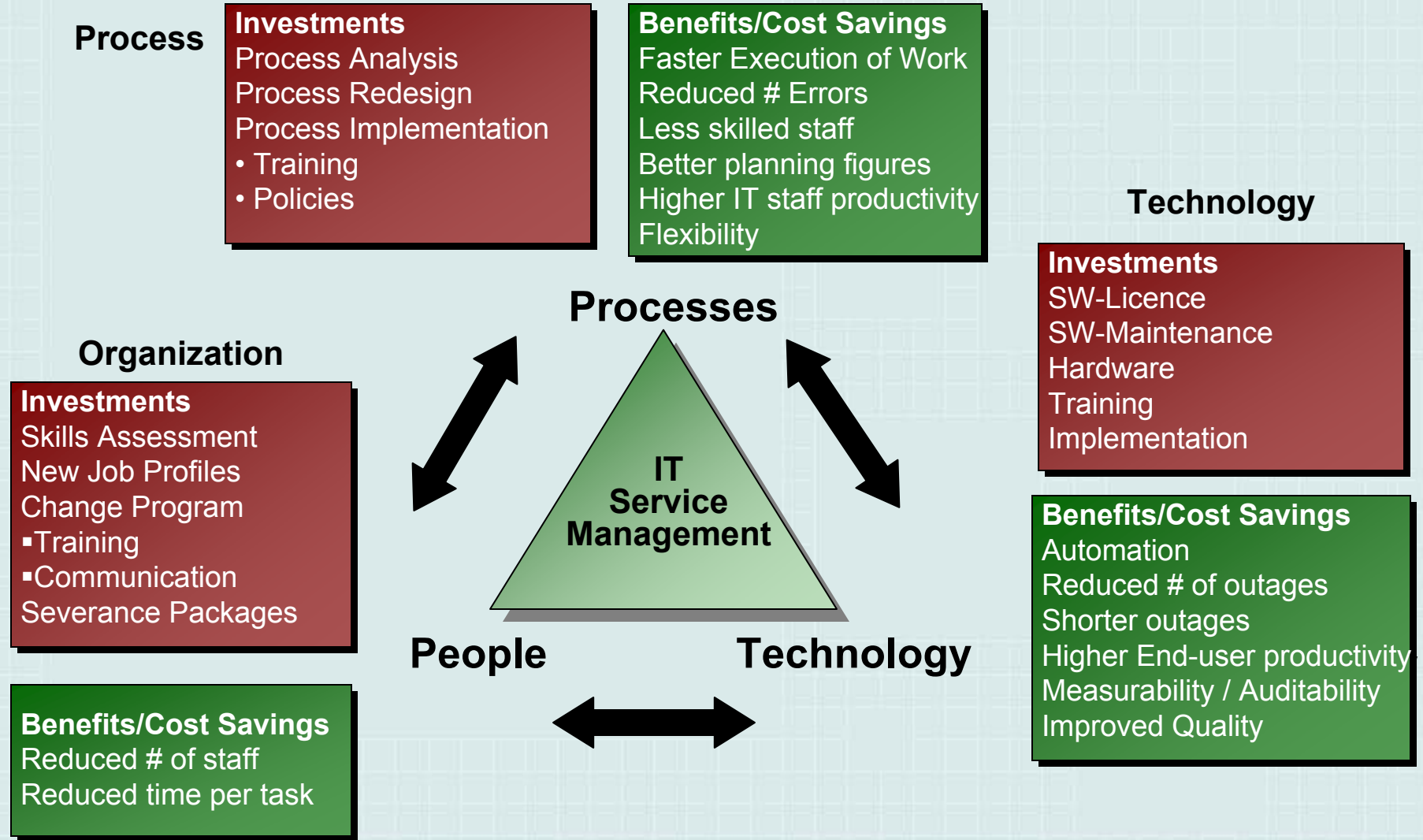
Hesiod

Greek Poet, 700 BC

Define scope by:

- Location
- Strategic goals
- Political reality
- Business Units
- Platform

Develop the Business Case



Process, Organization and Technology are highly interdependent
 ☞ **Maximum ROI can only be achieved with an integrated approach**

Create a Planning Matrix

Process Area	Maturity	Scope	Opportunity	Skills	Tools
Incident					
Problem					
Change					
Config.					
Release					
SLM					
Capacity					
Financial					
Continuity					
Availability					

Sell the ITSM Idea

Stakeholder	What is in it for me?
Business sponsors	<ul style="list-style-type: none">▪ In line with market costs▪ Reduced time to implement new IT▪ Increased availability of IT to the business▪ Business defined service levels▪ Guaranteed levels of service
Customers Users	<ul style="list-style-type: none">▪ Increased availability and reliability of IT to the business▪ Maintain or improve consistent Customer satisfaction
Employees Champions	<ul style="list-style-type: none">▪ Various levels of personal fulfillment▪ Improved job satisfaction▪ Streamlined processes▪ Improved productivity, lessened bureaucracy
Partners Vendors Suppliers	<ul style="list-style-type: none">▪ Improved relationships and increased business success▪ Clearer understanding of their position in the business
Change agents, Trainers, HR staff Communication specialists, Consultants	<ul style="list-style-type: none">▪ Fulfilling project work▪ Personal and work recognition, visibility▪ Learning and development
Development	<ul style="list-style-type: none">▪ Speedier handover process

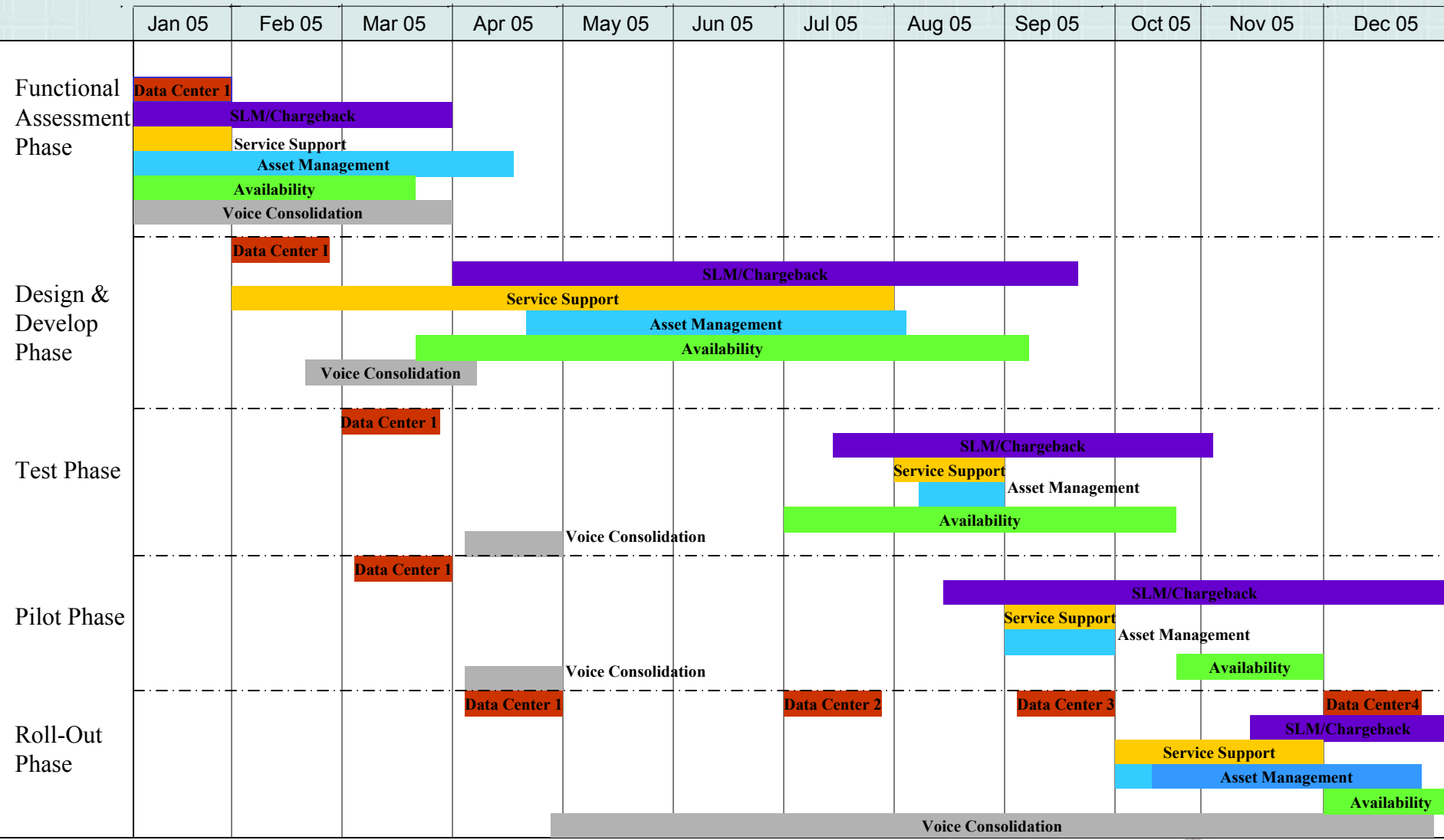
Develop an Implementation Plan

ITIL Process	Time to Implement	
	Small/Mid size IT organizations	Enterprise IT organizations
Service Desk/Incident Management	3-6 months	6-24 months
Configuration Management	3-4 months	4-12 months
Problem Management	1-3 months	3-4 months
Change Management	1-3 months	3-5 months
Release Management	1 month	1-2 months
Availability Management	3-6 months	6-9 months
Capacity Management	4-6 months	6-12 months
IT Service Continuity Management	3-6 months	6-12 months
Financial Management of IT Services	4-6 months	6-9 months
Service Level Management	2-4 months	4-6 months

Time Expectations for ITIL Implementation

Source: InterProm USA, 2002

Establish a Roadmap



Don't be afraid to ask for help ...

- Conducting the IT Service Management Assessment
- Defining the strategy
- Developing the implementation plan
- With education and training
- Effecting the necessary cultural change

Celebrate Your Success



Any Questions?

Thank You