# Information Technology Infrastructure Library

# ITIL® V3 Process Navigator

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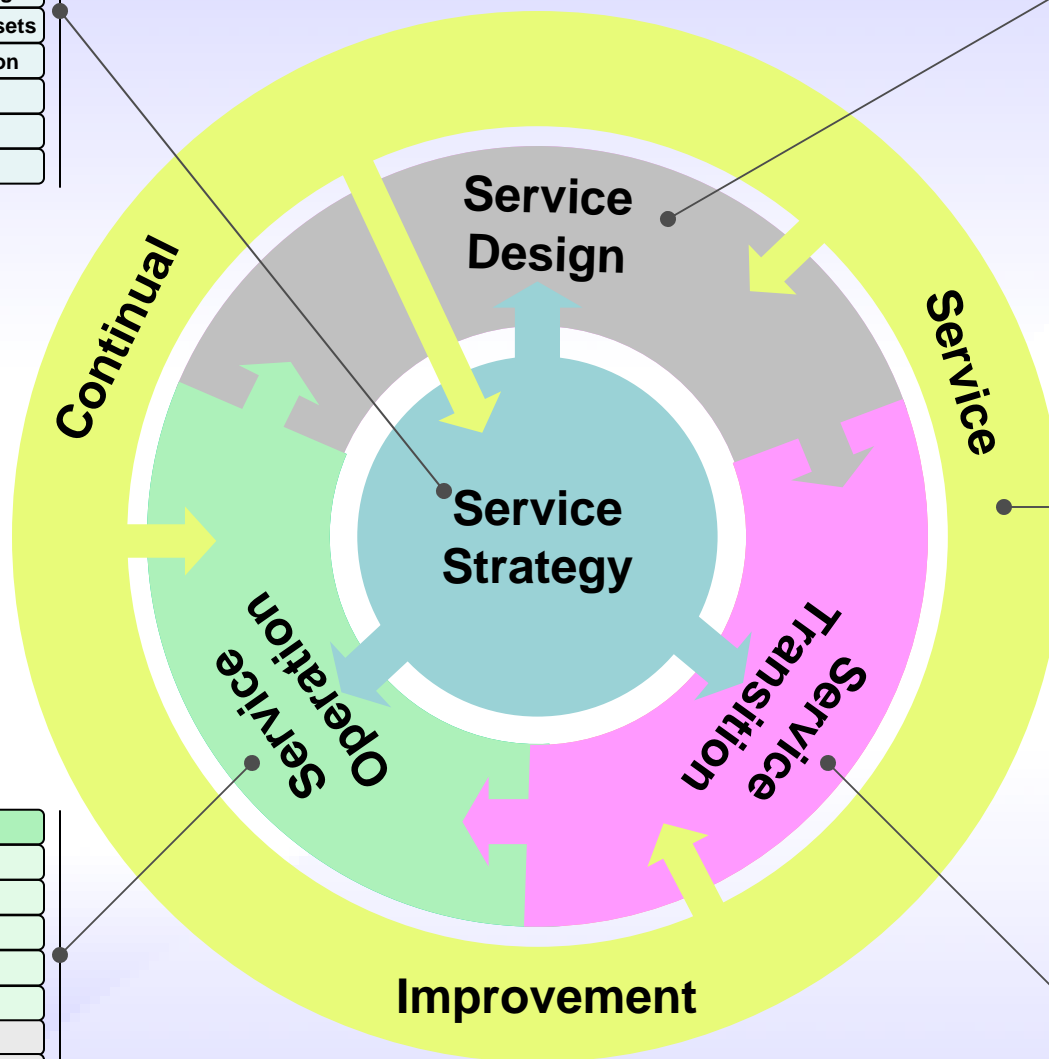
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# ITIL V3: Service Strategy (SS)

**Goal**
To provide guidance on how to how to design, develop and implement service management, whilst providing direction for growth not only as an organizational capability, but as a strategic asset

**Activities**
- Service Generation
  - Define the Market
  - Develop Service Offerings
  - Develop Strategic Assets
  - Prepare for Execution
- Service Portfolio Management
- Demand Management
- Financial Management

**Inputs**
Patterns of Business Activity, Business Requirements; Competitive forces

**Outputs**
Service Valuation (Provisioning Value); Demand Models; Service Portfolio; Management Service Provisioning Optimization (SPO); Operating and Capital Plans; Regulatory and Environmentally-rated Plans; Service Investment Analysis; Compliance; Variable Cost Dynamic

**Roles**
Chief Sourcing Officer; Director of Service Management; Contract Manager; Business Relationship Manager; Product Manager; Process Owner; Business Representatives

# ITIL V3: SS: Service Generation

**Goal**  To define the market space in order to develop service offerings.  To understand the resources and capabilities to establish strategic assets to deliver services that provide value through utility and warranty

**Activities**
- Define the market
- Develop the offerings
- Develop strategic assets
- Prepare for execution

**Inputs**  Business/Customer Requirements; Market Space Analysis; Service Knowledge Management System (SKMS); Service Portfolio; Service Catalogue

**Outputs**  Strategies; Policies; Resources and Constraints; Service Level Packages (SLP) - based on requirements

**Roles**  Chief Sourcing Officer (CSO); Business Relationship Manager (BRM); Product Manager (PM) Director of service management; Contract manager; Business representatives Process Owner

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# ITIL V3: SS: Define the Market

**Goal**

To understand the market space and identify opportunities to create value for Customers.

**Activities**

- Define the Strategy and Services
- Understand the Customers
- Understand the Opportunities
- Classify and Visualize Services as value-creating patterns

**Inputs**

Patterns of Business Activity, Capabilities, Resources, Constraints, Conflicts, Customer assets

**Outputs**

Value creation, Decision on investments, Asset-based Services, Utility-based Services, Identification of business outcomes, Understanding of customers, understanding of opportunities

**Roles**

Chief Sourcing Officer; Director of Service Management; Contract Manager; Business Relationship Manager; Product Manager; Process Owner; Business Representatives

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# ITIL V3: SS: Develop the Offerings

**Goal**

To develop outcome-based service that provide the Utility and Warranty to create value to customers.

**Activities**

- Identify the Market Space
- Define Outcome-based Services (value to the customer)
- Develop the Service Portfolio, Pipeline and Catalogue

**Inputs**

Value creation, Decision on investments, Asset-based Services, Utility-based Services, Identification of business outcomes, Understanding of customers, understanding of opportunities

**Outputs**

Identification of Market space, Outcome-based definition of services, Matching of Service portfolio to market space, Service Portfolio (Service Pipeline, Service Catalogue, Retired Services), Business cases, Identification of risks, Pricing, Lines of Service (LOS)

**Roles**

Chief Sourcing Officer; Director of Service Management; Contract Manager; Business Relationship Manager; Product Manager; Process Owner; Business Representatives

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# ITIL V3: SS: Develop the Strategic Assets

**Goal**

To develop strategic assets in the form of capabilities and resources that provide value to the customer.

**Activities**

- Develop closed-loop control systems
- Develop strategic assets
- Develop capabilities and resources

**Inputs**

Strategic Assessment, Identification of Market space, Outcome-based definition of services, Matching of Service portfolio to market space, Service Portfolio (Service Pipeline, Service Catalogue, Retired Services), Business cases, Identification of risks, Pricing, Lines of Service

**Outputs**

Closed-loop system, Service Design Requirements, Service Transition Requirements, Service Operation Requirements, Perspective, Position, Plan and Pattern

**Roles**

Chief Sourcing Officer; Director of Service Management; Contract Manager; Business Relationship Manager; Product Manager; Process Owner; Business Representatives

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# ITIL V3: SS: Prepare for Execution

**Goal**  To prepare for and ensure a successful implementation of the Service Strategy by following a rigorous plan.

**Activities**
- Strategic assessment
- Setting objectives
- Aligning service assets with customer Outcomes
- Defining critical success factors
- Critical success factors and competitive analysis
- Prioritizing investments
- Exploring business potential
- Alignment with customer needs
- Expansion and growth
- Differentiation in market spaces

**Inputs**  Customer constraints, outcomes, tasks

**Outputs**  Strengths, Weaknesses, Distinctive Competencies, Business Strategy, CSFs, Threat and Opportunities, Prioritization of Investments

**Roles**  Chief Sourcing Officer; Director of Service Management; Contract Manager; Business Relationship Manager; Product Manager; Process Owner; Business Representatives

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# ITIL V3: SS: Service Portfolio Management

**Goal**

To proactively manage the investment across the service lifecycle, including those services in the concept, design and transition pipeline, as well as live services defined in the various service catalogues and retired services

**Activities**

- Define: Inventory services, ensure business cases and validate portfolio data
- Analyze: Maximize portfolio value, align, prioritize & balance supply and demand
- Approve: Finalize proposed portfolio, authorize services and resources
- Charter: Communicate decisions, allocate resources and charter services

**Inputs**

Service Generation outputs

**Outputs**

Inventories; Business Case; Service Portfolio; Authorization; Value Proposition; Prioritization; Communication; Resource allocation

**Roles**

Product Manager

# ITIL V3: SS: Demand Management

**Goal**

To understand and influence Customer demand for Services and the provision of Capacity to meet these demands

**Activities**

- Establish Patterns of Business Activity
- Establish Core Services Packages and Supporting Services
- Establish Service Level Packages
- Combine SLPs with CSP to build the Service Catalogue with Segmentation
- Develop Differentiated Offerings

**Inputs**

Patterns of Business Activity
Customer Assets
Customer Outcome

**Outputs**

Core Service Packages
Service Level Packages

**Roles**

Business Relationship Manager
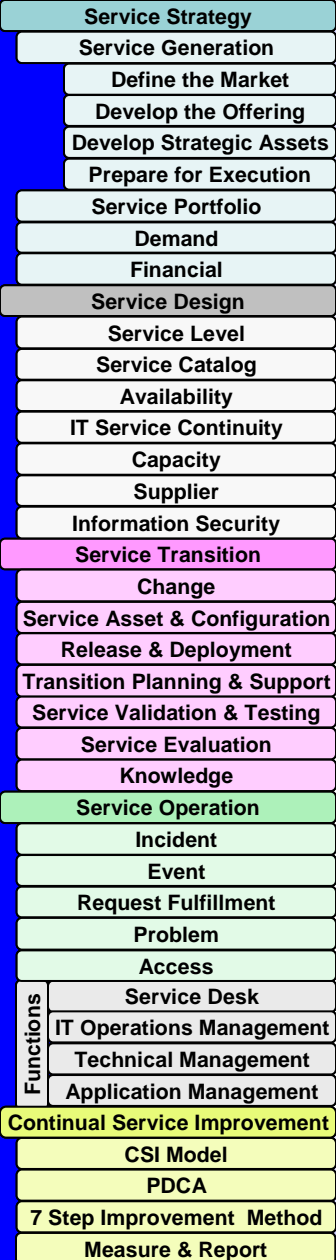
# ITIL V3: SS: Financial Management

**Goal**
To provides the business and IT with the quantification, in financial terms, of the value of IT services, the value of the assets underlying the provisioning of those services, and the qualification of operational forecasting.

**Activities**
- Service Valuation
- Service provisioning models and analysis
- Funding model alternatives
- Business Impact Analysis (BIA)
- Service Investment Analysis
- Establishing Cost recovery, value centre or accounting centre
- Chargeback
- Accounting
- Budgeting
- Return on Investment Analysis
    - Business Case
    - Pre-program ROI
    - Post-program ROI

**Inputs**
Demand modeling, Service Portfolio, Service Pipeline, Service Catalogue, retired services

**Outputs**
Service Valuation, service provisioning optimization, planning confidence, service investment analysis, accounting, budgets, charges, fees, compliance, service provisioning models

**Roles**
Financial Manager

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# ITIL V3: Service Design (SD)

**Goal**
To provide guidance to design appropriate and innovative IT services, including their architectures, processes, policies and documentation, to meet current and future agreed business requirements.

**Activities**
- Service Level Management
- Service Catalogue Management
- Availability Management
- Information Security Management
- Supplier Management
- Capacity Management
- IT Service Continuity Management

**Inputs**
Corporate visions, strategies, objectives, policies and plans, business visions, strategies, objectives and plans, including Business Continuity Plans (BCPs)

**Outputs**
The IT infrastructure and infrastructure management and environmental strategy, designs, plans, architectures and policies, applications and data strategies, designs, plans, architectures and policies, SLA, OLA, UC, Service Catalogue, SDP

**Roles**
Process Owner; Service Design Manager; IT Planner; IT Designer/Architect; Service Catalogue Manager; Service Level Manager; Availability Manager; IT Service Continuity Manager; Capacity Manager; Security Manager; Supplier Manager

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# ITIL V3: SD: Service Level Management

**Goal**
To ensure that an agreed level of IT service is provided for all current IT services, and that future services are delivered to agreed achievable targets.

**Activities**
- Determine, negotiate, document and agree requirements for new or changed services in SLRs
- Monitor and measure service performance achievements
- Collate, measure and improve customer satisfaction
- Produce service reports
- Conduct service review and instigate improvements
- Review and revise SLAs, service scope OLAs, contracts, UCs
- Develop and document contacts and relationships
- Develop, maintain and operate procedures
- Log and manage all complaints and compliments
- Provide the appropriate management information to aid performance management
- Maintain up-to-date SLM document templates and standards

**Inputs**
Business information: business strategy, financial plans, Business Impact Analysis: impact, priority, risk and urgency, The Service Portfolio, Pipeline and Service Catalogue, Change information: forward schedule of changes, CMS, Customer and user feedback and comments

**Outputs**
Service reports, Service Improvement Plan (SIP), The Service Quality Plan, Service Level Agreements (SLAs), Updated Service Level Requirements (SLRs), Operational Level Agreements (OLAs), underpinning contracts

**Roles**
Service Level Manager

# ITIL V3: SD: Service Catalogue Management

**Goal**

To ensure that a Service Catalogue is produced and maintained, containing accurate information on all operational services and those being prepared to be run operationally.

**Activities**

- Agreeing and documenting a service definition with all relevant parties
- Interfacing with Service Portfolio Management to agree the contents of the Service Portfolio and Service Catalogue
- Producing and maintaining a Service Catalogue and its contents, in conjunction with the Service Portfolio
- Interfacing with the business and IT Service Continuity Management on the dependencies of business units and their business processes with the supporting IT services, contained within the Business Service Catalogue
- Interfacing with support teams, suppliers and Configuration Management on interfaces and
- dependencies between IT services and the supporting services, components and CIs contained within the Technical Service Catalogue
- Interfacing with Business Relationship Management and Service Level Management to ensure that the information is aligned to the business and business process.

**Inputs**

Business information from the organization's business and IT strategy, plans and financial plans, Business Impact Analysis, changes to service requirements, Business requirements, Service Portfolio, CMS, Feedback from all other processes

**Outputs**

The documentation and agreement of a 'definition of the service', Updates to the Service Portfolio: should contain the current status of all services and requirements for services, The Service Catalogue

**Roles**

Service Catalogue Manager

# ITIL V3: SD: Availability Management

**Goal**

To ensure that the level of service availability delivered in all services is matched to or exceeds the current and future agreed needs of the business, in a cost-effective manner.

**Activities**

•**Reactive Activities:**
Monitor, measure, analyse and report, service and component availability, Unavailability analysis, Analyzing the expanded Incident Lifecycle, Service Failure Analysis
•**Proactive Activities:**
Identifying Vital Business Functions (VBFs), Designing for availability, Base product and components, Systems management, Service Management processes, High-availability design Special solutions with full redundancy, Component Failure Impact Analysis, Single Point of Failure analysis, Fault Tree Analysis, Modelling, Risk Analysis and Management, Availability testing schedule, Planned and preventative maintenance, Production of the Projected Service Outage (PSO) document, Continual review and improvement
**Designing for:  Redundancy, Reliability, Maintainability, Security, Scalability, Serviceability**

**Inputs**

Business information, Business impact information, Previous Risk Analysis and Assessment reports and a risk register, Service Portfolio and the Service Catalogue, costs, changes, CMS, SLAs, SLRs, OLA, UCs

**Outputs**

The Availability Management Information System (AMIS), The Availability Plan, Availability and recovery design criteria and proposed, service targets for new or changed services, Service availability, reliability and maintainability reports of achievements, Component availability

**Roles**

Availability Manager

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# ITIL V3: SD: IT Service Continuity Management

**Goal**

To support the overall Business Continuity Management process and ensure that the required IT technical and service facilities (including systems, networks, applications, technical support and Service Desk) can be resumed within required, and agreed, business timescales

**Activities**

•Initiation
  •Requirements and Strategy
  •Requirements – Business Impact Analysis (BIA)
  •Requirements - Risk Analysis – M_o_R
  •IT Service Continuity Strategy
  •Risk Response Measures , Off-site Storage, ITSCM Recovery Options
•Implementation
  •Organizational Planning
  •Testing
  •Walk-through, Full, Partial, Scenario
•On-going Operation
  •Education, awareness, training, review, testing, Change Management
•Invocation

**Inputs**

Business strategy, plans and financial plans, and information on their current and future requirements, IT information: from the IT strategy and plans and current budgets, A Business Continuity Strategy and a set of Business Continuity Plans: SLAs and SLRs

**Outputs**

Service continuity and recovery plans, ITSCM policy strategies , ITSCM plans , Emergency Response Plan, Damage Assessment Plan , Salvage Plan , Vital Records Plan, Crisis Management and Public Relations Plan, Accommodation and Services Plan , Security Plan

**Roles**

IT Service Continuity Manager

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# ITIL V3: SD: Capacity Management

**Goal**

To ensure that cost-justifiable IT capacity in all areas of IT always exists and is matched to the current and future agreed needs of the business, in a timely manner

**Activities**

- **Business Capacity Management**
- **Service Capacity Management**
- **Component Capacity Management**
- **The underpinning activities of Capacity Management**:

Utilization monitoring, Response time monitoring, Analysis, Tuning and optimization, Implementation, Exploitation of new technology, Designing resilience, Threshold management and control, Demand Management, Application sizing, Modeling and trending, Baselining, Trend analysis, Analytical modeling, Simulation modeling, Producing the Capacity Plan

-Monitoring the capacity

-Analyzing collected capacity metrics

-Tuning for optimal capacity

-Implementing capacity improvements through change management

-Storage of the monitoring information in the Capacity Database (CDB)

**Inputs**

Business information: from the organization's business strategy, plans and financial plans, and information on their current and future requirements, Service and IT information: from Service Strategy, the IT strategy and plans and current budgets, covering all areas of technology

**Outputs**

CMS, Capacity Plan, Service performance information and reports, Workload analysis and reports, Ad hoc capacity and performance reports, Forecasts and predictive reports, Thresholds, alerts and events

**Roles**

Capacity Manager

# ITIL V3: SD: Supplier Management

**Goal**
To manage suppliers and the services they supply, to provide seamless quality of IT service to the business, ensuring value for money is obtained

**Activities**
- Evaluation of new suppliers and contracts
- Supplier categorization and maintenance of the Supplier and Contracts Database (SCD)
- Establishing new suppliers and contracts
- Supplier and Contract Management and performance
- Contract renewal and/or termination

**Inputs**
Business information: from the organization's business strategy, plans and financial plans, and information on their current and future requirements, Supplier and contracts strategy, Supplier plans and strategies, Supplier contracts, agreements and targets, budgets

**Outputs**
The Supplier and Contracts Database (SCD), Supplier and contract performance information and reports, Supplier and contract review meeting minutes, Supplier Service Improvement Plans (SIPs), Supplier survey reports

**Roles**
Supplier Manager

# ITIL V3: SD: Information Security Management

**Goal**

To align IT security with business security and ensure that information security is effectively managed in all service and Service Management activities

**Activities**

- Production, review and revision of an overall Information Security Policy and a set of supporting specific policies
- Communication, implementation and enforcement of the security policies
- Assessment and classification of all information assets and documentation
- Implementation, review, revision and improvement of a set of security controls and risk assessment and responses
- Monitoring and management of all security breaches and major security incidents
- Analysis, reporting and reduction of the volumes and impact of security breaches and incidents
- Schedule and completion of security reviews, audits and penetration tests.

**Inputs**

Business information. Corporate governance and business security policies and guidelines, security plans, Risk Analysis and responses, IT information, Service information, Risk Analysis processes and reports, Details of all security events and breaches, Change information, CMS

**Outputs**

Security Management Policy, Security Management Information System (SMIS), Revised security risk assessment reports, Security controls, Audits and audit reports, Security test schedules and plans, Security breaches and major Incidents reports, Supplier security policies

**Roles**

Security Manager

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# ITIL V3: Service Transition (ST)

**Goal**

To provide guidance on delivering services that are required by the business into operational use by releasing and deploying service changes through controlled planning, testing, evaluation and minimization of risk.

**Activities**

- Change Management
- Service Asset and Configuration Management
- Release and Deployment Management
- Knowledge Management
- Service Transition Planning and Support
- Service Validation and Testing
- Evaluation

**Inputs**

SDP: Service definition; Service structure; Financial/economic/cost model, resources, escalation procedures and critical situation handling procedures, Design and interface specifications, Release design, Deployment plan, Acceptance Criteria

**Outputs**

Approved service release package and associated deployment packages, Updated Service package, Updated Service Portfolio and service catalogue, Updated contract portfolio, Documentation for a transferred or decommissioned service.

**Roles**

Service Transition manager, Planning and Support, Service asset manager, Configuration manager, Configuration analyst, Configuration administrator/librarian, CMS/tools administrator, Configuration Control Board, Change Authority, Change manager, Change Advisory Board Performance and Risk Evaluation Manager, Service Knowledge Management Process Owner Service Test Manager, Test Support, Release and Deployment Manager, Release Packaging and Build Manager, Deployment Staff, Early Life Support, Build and Test Environment Staff

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# ITIL V3: ST: Change Management

**Goal**

To respond to the customer's changing business requirements while maximizing value and reducing incidents, disruption and re-work.  Respond to the business and IT requests for change that will align the services with the business needs.

**Activities**

- Create and record the RFC
- Review RFC and change proposal:
  - Filter changes (e.g. incomplete or wrongly routed changes)
- Assess and evaluate the change:
- Authorize the change:
  - Obtain authorization/rejection
  - Communicate the decision with all stakeholders, in particular the initiator of the Request for Change
- Plan updates
- Coordinate change implementation
- Review and close change

**Inputs**

Policy and strategies for change and release; Request for Change; Change proposal, Plans – change, transition, release, deployment, test, evaluation and remediation, Current change schedule and PSO, CMDB, release package, baseline, Test results, test report

**Outputs**

Rejected RFCs, Approved RFCs, Change to the services, service or infrastructure resulting from approved RFCs, CI, Change schedule, Revised PSO, Authorized change plans, Change decisions and actions, Change documents and records, Change Management reports.

**Roles**

Change Manager
Change Authority
Change Advisory Board (CAB) and Emergency CAB (ECAB)

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# ITIL V3: ST: Service Asset & Configuration Management

**Goal**

To define and control the components of services and infrastructure and maintain accurate configuration information on the historical, planned and current state of the services and infrastructure.

**Activities**

- Management and Planning
- Configuration Identification
- Configuration Control
- Status Accounting and Reporting
- Verification and Auditing

**Inputs**

Change requests, purchase orders, acquisitions and service requests.

**Outputs**

CIs, Attributes, Relationships, CMDB, SACM provides input to all ITSM processes

**Roles**

Service asset manager, Configuration manager, Configuration analyst, Configuration administrator/librarian, CMS/tools administrator, Change manager

# ITIL V3: ST: Release and Deployment Management

**Goal**
To deploy releases into production and establish effective use of the service in order to deliver value to the customer and be able to handover to service operations.

**Activities**
- Planning
- Preparation for build, test and Deployment
- Build and Test
- Service testing and pilots
- Plan and prepare for deployment
- Perform transfer, deployment and Retirement
- Verify deployment
- Early life support
- Review and close a deployment
- Post implementation review of a deployment through Change Management.
- Review and close Service Transition

**Inputs**
Authorized RFC, Service package, SLP, SDP, including service model and SAC, IT service continuity plan and related business continuity plan, Service Management and operations plans and standards, Technology and procurement standards and catalogues

**Outputs**
Release and deployment plan, Completed RFCs for the release and deployment activities Service notification, Updated service catalogue with the relevant information about the new or changed service, New or changed Service Management documentation

**Roles**
Release and Deployment Manager
Deployment Staff
Release Packaging and Build Manager

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# ITIL V3: ST: Service Transition Planning and Support

**Goal**

To plan and coordinate resources to ensure that the requirements of Service Strategy encoded in Service Design are effectively realized in Service Operations. It is also responsible for identifying, managing and controlling the risks of failure and disruption during the transition

**Activities**

•Transition strategy
  •The Service Transition strategy defines the overall approach to organizing Service Transition and allocating resources.
•Prepare for Service Transition
  •Review and acceptance of inputs from the other service lifecycle stages
  •Review and check the input deliverables, e.g. SDP, Service Acceptance Criteria and evaluation report (see paragraph 4.6.6)
  •Identifying, raising and scheduling RFCs
•Planning and coordinating Service Transition
  •Planning an individual Service Transition
  •Integrated planning
  •Adopting program and project management best practices
  •Reviewing the plans

**Inputs**

RFC, CMDB, CMS, SKMS, CAB recommendations, SLAM reports

**Outputs**

Management Information, Transition Plan

**Roles**

Service Transition manager
Early Life Support

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| **Service Strategy** | |
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| Define the Market | |
| Develop the Offering | |
| Develop Strategic Assets | |
| Prepare for Execution | |
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| **Continual Service Improvement** | |
| CSI Model | |
| PDCA | |
| 7 Step Improvement Method | |
| Measure & Report | |

Functions

# ITIL V3: ST: Service Validation and Testing

**Goal** To provide objective evidence that the new/changed service supports the business requirements, including the agreed SLAs.

**Activities**
- Validation and test management
- Plan and design test
- Verify test plan and test design
- Prepare test environment
- Perform tests
- Evaluate exit criteria and report
- Test clean up and closure

**Inputs** The Service Package, SLP, Service Provider Interface Definition, Service Design Package, Release and Deployment Plans, Acceptance Criteria, RFC

**Outputs** Configuration baseline of the testing environment, Testing carried out (including options chosen and constraints encountered), Results from those tests, Analysis of the results, e.g. comparison of actual results with expected results, risks identified during testing activities.

**Roles** Service Test Manager, Build and Test Environment Staff; **Test Support:** The change manager is responsible for ensuring that tests are developed appropriate to approved changes, Test analysts carry out the tests, The developer/supplier is responsible for establishing root cause

# ITIL V3: ST: Service Evaluation

**Goal**
To Ensure that the service will be useful to the business is central to successful Service Transition and this extends into ensuring that the service will continue to be relevant by establishing appropriate metrics and measurement techniques.

**Activities**
- Service evaluation terms
- Evaluation process
- Evaluation plan
- Understanding the intended effect of a change
- Understanding the unintended effect of a change
- Factors for considering the effect of a service change
- Evaluation of predicted performance
- Evaluation of actual performance
- Risk management

**Inputs**
Service package
SDP and SAC
Test results and report.

**Outputs**
Service Portfolio , Service package, SDP, SAC
Test results and report
Evaluation report.

**Roles**
Performance and Risk Evaluation Manager

| |
|---|
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Functions

# ITIL V3: ST: Knowledge Management

**Goal**

To enable organizations to improve the quality of management decision making by ensuring that reliable and secure information and data is available throughout the service lifecycle.

**Activities**

- Knowledge Management strategy
  - The governance model
  - Organizational changes underway
  - Establishing roles and responsibilities and ongoing funding
  - Policies, processes, procedures and methods
  - Technology and other resource requirements
  - Performance measures.
- Knowledge transfer
- Data and information management
- Using the service knowledge management system

**Inputs**

Service Operation
Operations Staff
Problem Management Staff and Transition Staff

**Outputs**

Service Knowledge Management Base
Service Operation  and Operations Staff
Problem Management Staff and Transition Staff

**Roles**

Service Knowledge Management Process Owner

| |
|---|
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| **Release & Deployment** |
| **Transition Planning & Support** |
| **Service Validation & Testing** |
| **Service Evaluation** |
| **Knowledge** |
| **Service Operation** |
| **Incident** |
| **Event** |
| **Request Fulfillment** |
| **Problem** |
| **Access** |
| **Service Desk** |
| **IT Operations Management** |
| **Technical Management** |
| **Application Management** |
| **Continual Service Improvement** |
| **CSI Model** |
| **PDCA** |
| **7 Step Improvement Method** |
| **Measure & Report** |

**Functions**

# ITIL V3: Service Operation (SO)

**Goal**
To provide guidance to coordinate and carry out the activities and processes required to deliver and manage services at agreed levels to business users and customers by the ongoing management of the technology that is used to deliver and support services.

**Activities**
- Incident Management
- Event Management
- Request Fulfillment
- Problem Management
- Access Management

**Inputs**
Incident details, networks or computer operations , CMDB, Response from Incident matching against Problems and Known Errors, Resolution details, Response on RFC to effect resolution for Incident(s), SKMS, SLA, OLA, UC, Service Catalogue, Design, Operational procedures

**Outputs**
RFC for Incident resolution; updated Incident record (including resolution and/or Work-arounds) Resolved and closed Incidents, Communication to Customers, Management information (reports).

**Roles**
Incident Manager; First Line (Service Desk Agent); Second Line; Third Line; Problem Manager; Problem Solving Groups; Event Manager; Service Desk; Technical and Application; Management; Operations Management; Access Manager

# ITIL V3: SO: Incident Management

**Goal**

To restore normal service operation as quickly as possible and minimize the adverse impact on business operations.

**Activities**

•Identification
•Logging
•Categorization
•Prioritization
•Initial Diagnosis
•Escalation
•Investigation and Diagnosis
•Resolution and Recovery
•Closure

**Inputs**

Incident details sourced from (for example) Service Desk, networks or computer operations, Configuration details from the Configuration Management Database (CMDB), Response from Incident matching against Problems and Known Errors, Resolution details

**Outputs**

RFC for Incident resolution; updated Incident record (including resolution and/or Work-arounds), Resolved and closed Incidents, Communication to Customers, Management information (reports)

**Roles**

Incident Manager, Service Desk Manager, Service Desk Agent, Nth-line support

# ITIL V3: SO: Event Management

**Goal**

To monitor and control the IT infrastructure to detect, correlate and determine the appropriate action. To communicate all events that has or can reduce the quality of service to Incident Management.

**Activities**

- Instrumentation
- Event Notification
- Event Detection
- Event Filtering
- Event Significance Determination
- Event Correlation
- Triggering
- Response Selection
- Action Review
- Event Closure

**Inputs**

Exceptions to any level of CI performance defined in the design specifications, OLAs or SOPs Exceptions to an automated procedure or process, An exception within a business process that is being monitored by Event Management, The completion of an automated task or job

**Outputs**

Incident Management, SNMP messages, which are a standard way of communicating technical information about the status of components of an IT Infrastructure, Management Information Bases (MIBs) of IT devices, Vendor's monitoring tools agent software

**Roles**

Event Manager

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Functions

# ITIL V3: SO: Request Fulfillment

**Goal**

To provide a channel for users to request and receive standard services for which a pre-defined approval exists  To provide information to users and customers about the availability of services and the procedure for obtaining them. To assist with general information or comments.

**Activities**

- •Menu selection
- •Financial approval
- •Other approval
- •Fulfillment
- •Closure

**Inputs**

Service Desk/Incident Management

**Outputs**

A strong link is needed between Request Fulfilment, Release, Asset and Configuration Management

**Roles**

Service Desk

# ITIL V3: SO: Problem Management

**Goal**
To prevent problems and resulting incidents from happening, to eliminate recurring incidents and to minimize the impact of incidents that cannot be prevented

**Activities**
- Reactive Problem Management
- Proactive Problem Management
- Problem Detection
- Problem Logging
- Categorization
- Prioritization
- Investigation and Diagnosis
- Workarounds
- Raising a Known Error Record
- Problem resolution
- Problem Closure
- Major Problem Review
- Errors detected in the development environment

**Inputs**
Incident Management via recurring incidents, Request Fulfillment feedback and metrics.
All proactive Service Lifecycle processes such as Capacity, Availability Management

**Outputs**
Management Information, Problem Records , KEDB, Work-arounds , RFCs to Change Management

**Roles**
Problem Manager
Problem Solving Groups: technical support groups, suppliers support contractors

# ITIL V3: SO: Access Management

**Goal**

To grant authorized users the right to use a service, while prevent access to non-authorized users. To execute the policies and actions defined in Security and Availability Management.

**Activities**

- Requesting Access
- Verification
- Providing Rights
- Monitoring Identity Status
- Logging and Tracking access
- Removing or Restricting Rights

**Inputs**

An RFC, A Service Request, A request from the appropriate Human Resources Management personnel, A request from the manager of a department, who could be performing an HR role, or who could have made a decision to start using a service for the first time.

**Outputs**

Management Information
Identity
User information

**Roles**

Access Manager
Service Desk
Technical and Application Management and Operations Management

# ITIL V3: SO: Function: Service Desk

**Goal**

To act as the primary point of contact for users when there is a service disruption, for service requests or for some categories of Request for Change. The Service Desk provides a point of communication to the users and a point of coordination for several IT groups and processes.

**Activities**

- Logging all relevant incident/service request details, allocating category and priority codes
- Providing first-line investigation and diagnosis
- Resolving those incidents/service requests they are able
- Escalating incidents/service requests that they cannot resolve within agreed timescales
- Keeping users informed of progress
- Closing all resolved incidents, requests and other calls
- Conducting customer/user satisfaction callbacks/ surveys as agreed
- Communication with users
- Updating the CMS under the direction and approval of Configuration Management

**Inputs**

All incident records and information, Problem Records and information, Known Error Data, Change Schedule, Sources of internal knowledge (especially technical or application experts), SKMS, CMS, Alerts from monitoring tools, SL Targets in SLAs, OLAs, UCs.

**Outputs**

Customer/User Satisfaction Surveys, Service Desk Metrics, Super-user updates, training, communication with users,

**Roles**

Local, Centralized and Virtual Service Desk
Service Desk Manager, Service Desk Supervisor, Service Desk Analysts, Super Users

# ITIL V3: SO: Function: IT Operations Management

**Goal**

To provide daily operational activities needed to manage the IT Infrastructure. It has two sub-functions: IT Operations Control and Facilities Management

**Activities**

**IT Operations Management** is the function responsible for the daily operational activities needed to manage the IT Infrastructure. This is done according to the Performance Standards defined during Service Design.

**IT Operations Control**, which is generally staffed by shifts of operators and which ensures that routine operational tasks are carried out. IT Operations Control will also provide centralized monitoring and control activities, usually using an Operations Bridge or Network Operations Centre.

**Facilities Management** refers to the management of the physical IT environment, usually Data Centres or computer rooms. In many organizations Technical and Application Management are co-located with IT Operations in large Data Centres.

**Inputs**

Technical Management and Application Management

**Outputs**

Standard Operation Procedures (SOP), Operations Logs, Shift Schedules and Reports, Operations Schedule, IT Operations Management metrics

**Roles**

IT Operations Manager, Shift Leaders, IT Operations Analysts, IT Operators

# ITIL V3: SO: Function: Technical Management

**Goal** To provide detailed technical skills and resources needed to support the ongoing operation of the IT Infrastructure. Technical Management also plays an important role in the design, testing, release and improvement of IT services.

**Activities**
Mainframe, Server, Network, Storage, Database, Directory Services, Desktop, Middleware, Web
- Custodian of technical knowledge and expertise related to managing the IT Infrastructure.
- Ensures that the knowledge required to design, test, manage and improve IT services is identified, developed and refined.
- Provides the actual resources to support the ITSM Lifecycle
- Ensure that resources are effectively trained and deployed to design, build, transition, operate and improve the technology required to deliver and support IT services
- Identifying the knowledge and expertise required to manage and operate the IT Infrastructure and to deliver IT services
- Documentation of the skills that exist in the organization
- Design and delivery of training for users, the Service Desk and other groups
- Definition of standards used in the design of new architectures
- Research and development of solutions

**Inputs**
Service Portfolio, Service Pipeline, Service Catalogue, SLP, SDP, LOS, Service Acceptance Criteria, RFC, CMDB, CMS, SKMS, AMIS, CMIS

**Outputs**
Measurement of agreed outputs, process metrics, technology metrics, Mean Time Between Failures of specified equipment, Measurement of maintenance activity, Training and skills development

**Roles**
Technical Managers/Team-leaders, Technical Analysts/Architects, Technical Operator
In Mainframe, Server, Storage, Network Support, Desktop, Database, Middleware, Directory Services, Internet or Web, Messaging, IP-based Telephony teams

# ITIL V3: SO: Function: Application Management

**Goal**

To manage applications throughout their lifecycle. The Application Management function supports and maintains operational applications and also plays an important role in the design, testing and improvement of applications that form part of IT services.

**Activities**

• One of the key decisions that they contribute to is the decision of whether to buy an application or build it
• It is the custodian of technical knowledge and expertise related to managing applications. In this role Application Management, working together with Technical Management, ensures that the knowledge required to design, test, manage and improve IT services is identified
• It provides the actual resources to support the ITSM Lifecycle. In this role, Application Management ensures that resources are effectively trained and deployed to design, build, transition, operate and improve the technology required to deliver and support IT services
• Application Management Lifecycle: Requirements, Design, Build, Deploy, Operate, Optimize
• Identifying the knowledge and expertise
• Recruiting or contracting resources
• Design and delivery of end-user training.
• Definition of standards used in the design of new architectures and participation

**Inputs**

Service Strategy, Service Design, Service Transition, Service Operation, Continuous Service Improvement, Functionality Requirements, Manageability Requirements, Usability Requirements, Test Requirements, Use and Change Cases, Manuals,

**Outputs**

Measurement of agreed outputs, Process metrics, Application performance, Measurement of maintenance activity, Application Portfolio, Application Requirements

**Roles**

Applications Managers/Team-leaders, Applications Analyst/Architect

# ITIL V3: Continuous Service Improvement (CSI)

**Goal**
To provide guidance on maintaining the value for customers through the continual evaluation and improvement of the quality of services and the overall maturity of the ITSM service lifecycle and underlying processes.

**Activities**
- Continuous Service Improvement Model
- Plan Do Check Act (PDCA) Model
- 7 Step Improvement Method

**Inputs**
Business Requirements, SLAs, OLAs UCs , Incidents, CFIA, FTA, Management of Risk, AMIS, Application Sizing, Change Model, Change schedules , CMS, Security Policy, Cost Model, Service strategy plans, AM Plan, Configuration Plan, Problem reviews, Modelling, CMIS, PSA

**Outputs**
Service Management process recommendations, Audits, Reports, Updated Availability and Capacity Plans, Monitoring procedures, Identified tools to use, Monitoring plan, Input on IT capability, Collection of data, Agreement on the integrity of the data.

**Roles**
Service Manager, CSI Manager, Service Owner, Process Owner, Knowledge Manager, Process Owner, Reporting Analyst

# ITIL V3: CSI: Continual Service Improvement Model

**Goal**

**To validate** – monitoring & measuring to validate previous decisions; **To direct** – monitoring & measuring to set direction for activities to meet set targets. **To justify** – monitoring & measuring to justify; **To intervene** to identify a point of intervention including subsequent change

**Activities**

- What is the vision?
- Where are we now?
- Where do we want to be?
- How do we get there?
- Did we get there?
- How do we keep the momentum going?

**Inputs**

Business vision, mission, goals and objectives, Baseline assessments, Measurable targets, Service & process improvement, Measurements & metrics

**Outputs**

Business vision, mission, goals and objectives, Baseline assessments, Measurable targets Service & process improvement, Measurements & metrics

**Roles**

Process Owner, Service Manager, CSI Manager, Service Owner
Knowledge Management Process Owner
Reporting Analyst

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# ITIL V3: CSI: Deming Cycle – Plan Do Check Act

**Goal**

The goal in using the Deming Cycle is steady, ongoing improvement. It is a fundamental tenet of Continual Service Improvement.

**Activities**

**Plan** – Establishes goals for improvement including gap analysis, definition of action steps to close the gap and establishing and implementing measures to assure that the gap has been closed and benefits achieved.

**Do** – Development and implementation of a project to close the gap. Implementation or improvement of processes and establishing the smooth operation of the process.

**Check** – Comparison of the implemented environment to the measures of success established in Plan phase. The comparison determines if a gap still exists between the improvement objectives of the process and the operational process state.

**Act** – The decision process to determine if further work is required to close remaining gaps, allocation of resources necessary to support another round of improvement. Project decisions at this stage are the input for the next round of the lifecycle, closing the loop as input in Plan. REPEAT

**Inputs**

Business requirements, External requirements, Security requirements, Request for new service Service and process measurements

**Outputs**

Improved employee morale, New changed services, More effective and efficient processes, Customer satisfaction, Business results

**Roles**

Process Owner, Service Manager, CSI Manager, Service Owner
Knowledge Management Process Owner
Reporting Analyst

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# ITIL V3: CSI: 7 Step Improvement Process

**Goal** To collect, analyze, process relevant metrics from a process in order to determine its weakness and establish an action plan to improve the process.

**Activities**
1 Define what you should measure
2 Define what you can measure
3 Gathering the data
4 Processing the data
5 Analyzing the data
6 Presenting and using the information
7 Implementing corrective action
REPEAT

**Inputs** Each activity has inputs

**Outputs** Each activity has outputs

**Roles** Process Owner, Service Manager, CSI Manager, Service Owner
Knowledge Management Process Owner
Reporting Analyst

# ITIL V3: CSI: Service Measurement and Reporting

**Goal**

To monitor services and report on improvement opportunities

**Activities**

Service Measurement
- Objective (Availability, Reliability, Performance of the Service)
- Developing a Service Measurement Framework
- Different levels of measurement and reporting
- Defining what to measure
- Setting targets
- Service management process measurement
- Creating a measurement framework grid
- Interpreting and using metrics
- Interpreting metrics
- Using measurement and metrics
- Creating scorecards and reports
- CSI policies

Service Reporting
- Reporting policy and rules

**Inputs**

SLA Targets, SLRs, OLAs, Contracts

**Outputs**

Service Improvement Program, SLAM Reports

**Roles**

Process Owner, Service Manager, CSI Manager, Service Owner
Knowledge Management Process Owner
Reporting Analyst