



Scope and Development Plan: ITIL® V3 Update

February 2010



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Preamble

What is ITIL®?

ITIL (IT Infrastructure Library) is the most widely accepted approach to IT service management in the world. ITIL provides a cohesive set of best practice, drawn from public and private sectors internationally. It is supported by a comprehensive qualification scheme, accredited training organizations (ATOs), and implementation and assessment tools. The best-practice processes promoted in ITIL are supported by the international standard for IT service management, ISO/IEC 20000. ITIL is the only consistent and comprehensive documentation of best practice for IT service management and is used by hundreds of organizations around the world.

ITIL consists of a series of publications giving guidance on the provision of quality IT services, and on the environment needed to support IT. ITIL has been developed in recognition that organizations 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.

ITIL was last refreshed in 2007. Content for the latest update will shortly enter development. Agreed changes result from a survey of ATOs, an analysis of change control requests logged with The Stationery Office (TSO), and the completion of a scoping exercise.

Purpose of this document

This document gives an overview of the approach to the present update of the ITIL V3 core publications. It outlines the scope, plans and governance structure of the update work. It also shows the way in which the proposed structure and scope supports improvements recommended by the ITIL Change Advisory Board. The Board analysed issues logged between the V3 publication date and November 2009. Finally, an approximate guide to development timescales is given.

Acknowledgements

TSO and the Office of Government Commerce (OGC) wish to thank and recognize the efforts of the following individuals and organizations who assisted in the scoping of the ITIL V3 update. Each of these participants contributed time and effort to ensure that the scope of the update reflects genuine issues with the material and will improve ITIL best practice. These participants include:

- Users and training organizations who responded to the survey
- Members of the ITIL Change Advisory Board (Sharon Taylor, David Favelle, Kevin Holland, David Cannon, Ashley Hanna, Stuart Rance)
- All those who raised issues via the change control log.

1 Introduction

On 8 November 2004, OGC launched a six-month project to define the scope and development plans for a refreshed version of ITIL best-practice guidance. OGC, with assistance from numerous organizations and individuals, undertook an extensive public consultation to gain the opinions of ITIL users, vendors and educators around the world. The consultations were very successful in conveying to the project team the views of the information technology service management (ITSM) community. There was a high degree of consensus, and a summary of the findings formed the scope for what would become Version 3 of ITIL. The scoping document was published in June 2006.

We believe that basic market needs have not changed significantly since then. However, since publication in May 2007, the ITSM community has had time to digest and use ITIL Version 3, and there have been some fair criticisms fed back to OGC. Hundreds of issues have been logged under change control on the best-management-practice website (www.best-management-practice.com). Following analysis of these, together with views transmitted back to OGC, TSO and APMG from trainers and users, the ITIL Change Advisory Board (CAB) and OGC have agreed that the effectiveness and usefulness of ITIL would be improved by providing an updated Version 3.

2 Aims of the update

The principal aims of the project to update ITIL V3 are to:

- Resolve any errors or inconsistencies in the text and diagrams, both in content and presentation
- Improve the publication by addressing issues raised in the change control log, as analysed and recommended by the CAB and approved by OGC. These are largely to do with clarity, consistency, correctness and completeness
- Address suggestions for change made by the training community to make ITIL easier to teach
- Review the Service Strategy publication to ensure that the concepts are explained in the clearest, most concise and accessible way possible. There is no notion of simplifying the concepts; rather, improving the exposition of the ideas.

No new concepts or practices will be introduced, and no existing ones will be abandoned. Where new content is introduced, it will be for completeness, to redress an imbalance in the level of detail, or as part of restructuring for consistency.

2.1 In scope

- Look at remedying inconsistencies within the content of the five books:
 - Roles need to be made consistent across the books, ensuring that the activities apply only to one role
 - Clarify that the organizational structures given as examples are indicative rather than prescriptive

- Restructure the guidance to ensure that all five publications are organized in the same way:
 - Ensure that each process has goals, purpose and objectives
 - Look at how the processes are dealt with and ensure a common treatment for all
- Ensure that the books are aligned, where relevant, with guidance in MSP™, M_o_R®, PRINCE2® and P3O®.
- Give clear explanations and descriptions of roles and responsibilities
- Standardize the use of glossary definitions within the five titles. Ensure that the explanations in the text align with those in the glossary
- Update the glossary to take account of the comments made in the Change Control Log
- Examine the definition and usage of the roles of Product Manager and Service Owner

- Ensure that service catalogue manager appears within Service Operation
- Redesign the content according to OGC’s updated style guidelines.

2.2 Out of scope

Any changes which would invalidate the current use of ITIL, whether by organizations which have adopted its use or by individuals who have taken an ITIL qualification and are currently using the method in their workplace.

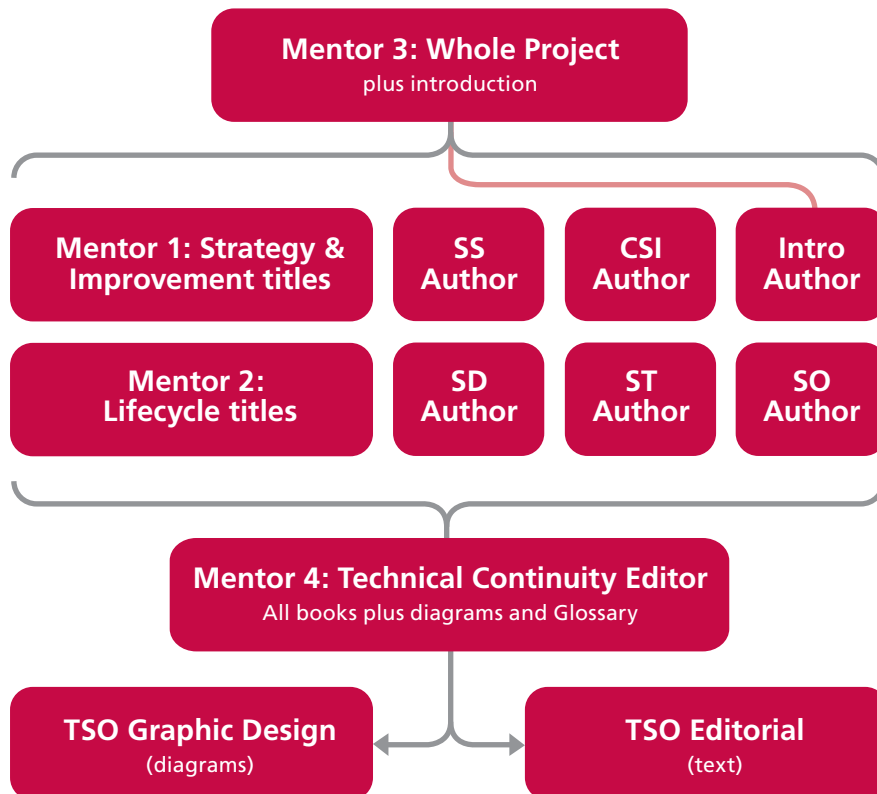
3 Governance and structure of the development team

For the Version 3 refresh development in 2006, the model used was authors working alongside mentors. This model will be used in the update, with authors and mentors working together, reporting to the Project Board.

The Governance structure is as follows:



Authors have been recruited through the Call for Participants document. There will be a single author for each book, and mentors will be assigned to one or more books, often with other responsibilities, to ensure compatibility, harmony and consistency. The diagram below shows the relationship between these team members.



The Mentors play an important role in the structure. They have to ensure consistency across the updated books. Therefore mentor posts were filled by invitation to members of the team original V3 development team. The reporting route for all individuals is via the relevant book or continuity mentor to the whole project mentor.

Work packages will be created for each book. They will contain a product description and a detailed scope, including a relevant list of issues recommended for resolution by the CAB.

Products will be reviewed by the Review Group for fitness for purpose. In effect, this means determining whether they comply with the product description and have satisfactorily resolved all the outstanding issues. The Review Group is intended to be representative of the ITIL community and will comprise:

- Small, medium and large public and private sector users
- Vendors
- Consultants

- Training organizations
- International reviewers

Reviewers have also been recruited via the *Call for Participants* document (www.best-management-practice.com/gempdf/OGC_Call_for_Participants_ITIL_Update_October_2009.pdf) with the intention to create a balanced and representative Review Group. Individuals may be asked to comment on ideas, proposals, outlines or partial products at any time. There will also be two formal reviews of each of the six books. Any particular individual may be asked to review just one book in depth, or the whole set specifically for consistency. Once the core books are finalized, the Introduction will be updated to match. This activity must be done at this time, as the Introduction is entirely derivative. Two rounds of review of the Introduction will be completed.

4 Categories of change

The project mandate (www.best-management-practice.com/gempdf/ITIL_Mandate_for_Change_0909.pdf) is to correct errors, remove inconsistencies and improve clarity and structure. The Work Instructions to be given to each author will list and describe in detail each relevant issue from the change control log and the CAB's recommendation for action. More general criticisms – for example, from the ATO survey – will be passed on in a briefing from the mentors. It is considered likely that authors, in addressing these various concerns, will discover issues of their own with the material. We would expect them to address these too. They will be able to go to their mentor(s), the CAB or to reviewers for views, opinions and guidance.

Many of the change control log issues were identified as typos or errors. Any unambiguous errors have been sent to TSO Editorial to change, so that the starting point for the update development work will be a clean version of the V3 Word document with obvious errors corrected. TSO Editorial has also reduced the excessive and inconsistent use of initial capitals on many of the terms, and inserted a revised glossary which reflects the changes approved by the CAB.

Other issues for the development team fall into the following categories:

4.1 Correction

Obvious errors will be addressed.

4.2 Clarity

The new author will ensure such passages are easier to understand and free from ambiguities or confusing statements and references. They will also receive guidelines on writing international English (note that this is not American English). By this we mean plain English (with -ize verbal endings in preference to -ise where both spellings are in use) that is comprehensible not only to native English speakers, but also to people who use English as a business language, or speak English as a second language. This largely means avoidance of uncommon words, unusual meanings of common words, idioms and lengthy sentences. Getting this right also means that translation becomes easier.

4.3 Consistency

There are many areas where consistency problems exist in the current books. Although a common structure was created for all the books during V3 development, there are inconsistencies in the extent and coverage of descriptions of practices, functions, processes, roles and activities which need to be resolved.

One of the more significant criticisms is that V3 does not say enough about roles, and what it does say is patchy. It will be made clear that ITIL does not lay down definitive job titles, just roles, and that organizational structures given are indicative, not

prescriptive. Roles will be made consistent across the books, and activities must apply only to one role. The description of roles and the depth of detail must be made consistent.

Processes will be clearly identified, and each described in a consistent way. There will be one location (the most appropriate one) where each process is described in detail, and elsewhere that description will be referred to.

Inconsistencies in definitions of terms will be resolved and aligned with the glossary. Further, descriptions of concepts or processes in ITIL will be made consistent with their treatment elsewhere in OGC Best Practice. For example, risk management in ITIL should align with M_o_R®.

Completeness is an issue, and is being treated as part of consistency. It is not about addition of new concepts. Part of the authors' and mentors' responsibility will be to ensure that each topic contains the right amount of detail, and comparable items – role descriptions, processes etc. – are all present and have comparable detail consistently across all books.

In summary, the author will resolve errors or inconsistencies of detail or extent in text, tables and diagrams, changing, removing or adding material as appropriate. Mentors and the technical continuity editor will ensure consistency in changes across the series.

4.4 Diagrams

In some cases, diagrams are in error, contradict each other or the text, are not referenced by the text or are repeated in another book, but drawn differently. Authors will work with the technical continuity editor to ensure that all diagrams are drawn to common standards, are consistent, and are referenced in the text. As part of improving clarity, some diagrams may be changed, removed or added.

4.5 Service Strategy

Concern has been voiced that *Service Strategy* is much more challenging for readers than the other books. OGC required V3 authors to write plain concise international English, but there is room for improvement and this will be encouraged in the update.

Reading and understanding are two different aspects of the perception of a difficult text. Of all the books in V3, *Service Strategy* held the most new material. It included a lot of business-related concepts that were new to many readers at that time, but have since been largely digested and accepted. However, many respondents still feel that that *Service Strategy* is too discursive and not instructive enough; that the processes are not clearly identified; and that the treatment of the stages of strategy formulation, leading to the specification of IT services, would benefit from clarification. Therefore, OGC is giving the *Service Strategy* update author greater freedom than the other authors to clarify the text and sharpen the presentation. This work will be carefully appraised, and no changes will be accepted that are not deemed to be improvements. It probably bears repeating that all OGC desires

from this exercise is an improvement in the presentation and exposition of *Service Strategy*, and thus its usability – not a simplification of the concepts.

5 Consequential changes

Many people will be concerned about how the changes to ITIL will affect other publications and the qualification scheme as well as applications and services based on ITIL. Any impact is likely to be minor.

5.1 Other publications

Improvements in the core texts will be cascaded first to the *Introduction*, as part of this project. Later, other titles will be revised in accordance with the updated ITIL. There is no schedule available at present. It is not expected that any of the changes to ITIL resulting from the update will render any current V3 publications seriously incorrect. The reason for revision would be to improve derivative works in terms of clarity, consistency, improved definitions and the latest diagrams.

5.2 Qualification scheme

Some of the changes are expected to make ITIL easier to teach, and will gradually be incorporated into teaching materials. There is no intention to change the qualification structure resulting from the update. Consequential changes required to syllabuses and exams are expected to be minor. This is because the exams test understanding of the concepts and practices, and these will not be changed.

5.3 Third-party applications

There are many software products, such as service desk support applications, that embody the processes described in ITIL. Again, it is not expected that the changes in the update will move any existing products out of alignment with ITIL. Suppliers will determine if there is any benefit in introducing any changes that could be made to their products on an individual basis.

5.4 Commercial ITIL-based IT service providers

ITIL-based providers of IT services should not be affected by the changes. Some issues may be resolved for them, where insufficient detail was given previously in ITIL, enabling them to improve their service. Customers will not be affected.

6 Core library translation

OGC and the project team wish to see the fruits of the update project made available globally in many languages as early as possible. The glossary is the foundation stone upon which all translations are constructed. Because of the drive for consistency in definitions of terms, it is inevitable that some definitions will change. The first task therefore will be to roll out a revised glossary for each language in which ITIL is currently published. On a slower timescale the books will be revised in accordance with the revised glossary and the new English text.

7 Key project milestones

Please note that these dates are provisional at this time.

Mandate published	August 2009
Call for participants	November 2009
Appointment of authors and mentors	November/December 2009
First development workshop	January 2010
Publication of five core titles	Aiming for the first quarter of 2011

Further information

ITIL V3 Update Project Mandate

www.best-management-practice.com/gempdf/ITIL_Mandate_for_Change_0909.pdf

Call for Participants

www.best-management-practice.com/gempdf/OGC_Call_for_Participants_ITIL_Update_October_2009.pdf

FAQ

www.best-management-practice.com/gempdf/ITIL_Update_FAQs_Oct09.pdf

Regular updates on the progress of the ITIL update project will be published regularly and can be viewed at: www.best-management-practice.com

Glossary

APMG	APM Group, official accreditor for the ITIL Qualification Scheme
ATO	Accredited Training Organization
CAB	Change Advisory Board
CSI	Continual Service Improvement book
IEC	International Electrotechnical Commission
ISO	International Standards Organization
IT	information technology
ITIL®	IT Infrastructure Library®
ITSM	IT service management
itSMFI	IT Service Management Forum International
M_o_R®	Management of Risk, OGC Best Practice
OGC	Office of Government Commerce, owners of ITIL
SD	Service Design book
SO	Service Operation book
SS	Service Strategy book
ST	Service Transition book
TSO	The Stationery Office, Official Publisher of ITIL
V3	(ITIL) Version 3

OGC service desk

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The service desk will also channel queries to the appropriate second-line support. We look forward to hearing from you.

You can contact the service desk Monday–Friday, 8am–6pm

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E: ServiceDesk@ogc.gsi.gov.uk

W: www.ogc.gov.uk

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