Case Study: How we achieved a successful ITSM implementation in 12 months

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Agenda

8:30 Quick overview of ITIL and ITSM (5 min)
Introduction
Partners
Processes
10:00 Break
Products
People
Summary
11:30 Questions and Answers at 11:30

Overview

The Service Provider
The Customer and Users
The Services
Our role

About the audience

- How many are ITIL trained or aware?
- How many have implemented or are implementing ITSM?
- How many are thinking about implementing ITSM?
- What is biggest barrier to a successful ITSM implementation?
  a. Process (support, delivery, design, deployment, ...)
  b. Product (software and hardware technology, tools, ...)
  c. People (culture, behaviour, attitude, willingness to change, ...)
The Service Support and Delivery Books

circa 2000

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<th>Service Desk*</th>
<th>Incident Management</th>
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An IT Service Management (ITSM) is about running IT like a business. ITSM is a discipline that integrates strategies, people, processes and technologies using best practices to provide quality IT services for customers and users within agreed upon service levels.

An ITSM Program is an IT Transformation project. For some it will be an easy change but for most it will be a paradigm shift.

The Approach was Aligned with ITIL for Enabling a CSIP

1. Where are you today?
2. Where do you want to be?
3. How are we going to get there?
4. How will you know when you get there?

An ITIL-based Four Track Approach

- Proven in practice
- Turn-key
- Repeatable
- Reusable
- Directed
- Facilitated
- Coaches
- Mentors
- Documented
- Workbooks
- CSIP
- Institutionalized
Success is all about execution

“Success is all about execution. A sound strategy outstandingly executed is far superior to an outstanding strategy poorly executed.”

Reviewed the Strategy Every 3 Months

10 Point Strategy Assessment

- How do we feel about the strategy?
- What are our achievements?
- What has been accomplished?
- What are the substantive issues?
- What are the process issues?
- How are we doing against our timeline?
- What is our next three months’ priorities?
- What are our next three months’ goals?
- What is our next three months’ action plans?
- What could get in our way?
The success of any project is directly related to Leadership

I like to...

a. Achieve breakthroughs in performance
b. Achieve incremental improvements in performance
c. Acquire much different types of customers
d. Challenge and obstacles to improve daily performance
e. Commit to an entirely new mission
f. Control things
g. Create a clear and compelling vision of the future, which may look altogether different from today
h. Develop strategy
i. Enter new markets
j. Face current reality
k. Implement strategy
l. Innovate
m. Keep things in a state of equilibrium (but not status quo)
n. Make major change happen
o. Manage or mitigate risk
p. Manage tactics
q. Stay loyal to the mission
r. Take actions to deal with immediate issues
s. Take big risks

Are You a Leader or a Manager

Assigned Process Managers

Incident Manager
Problem Manager
Change Manager
Configuration Manager
Release Manager
Service Level Manager
IT Service Continuity Manager
Availability Manager
Capacity Manager
Financial Manager

Model the way
Inspire a Shared Vision
Challenge the Process
Enable others to Act
Encourage the Heart

"The Leadership Challenge", Kegan and Lahey, 2002

Its All About Leadership

Leadership
What we overheard from the Staff

- "We tried this two years ago and it failed"
- "We are trying to change far too many things at once"
- "We lack a clear sense of shared priorities"
- "There's just no time to work on strategic issues"
- "We're always re-inventing the strategy!"
- "We are strategic ... until budget time when the strategy goes out the window"
- "We start off with good intentions - but, far too often, we fail to deliver"

Identified 5 Critical Issues

1. Failure to focus/make the choices
2. Failure to persist
3. Management churn
4. Failure to resource adequately
5. Inappropriate culture

What were the Symptoms?

1. High level of passive resistance – they would wink as they left the room
2. Overwhelming operational focus
3. Inappropriate recognition/rewards
4. Lack of accountability

Successful Leadership Checklist

1. Unflappable
2. High task focus
3. Disciplined, logical
4. Effective communicator
5. Work long hours
6. Energize teams
7. Get out on the "site" – hands-on
8. Demand results

The Solution:

1. Appropriate recognition system
2. Champions for initiatives
3. Accountability
**Defined a Communications Plan**

1. Identified Key Stakeholders
2. Culture Assessment
3. HR Best Practices
4. Kickoff Meetings
5. Arbitration Process
6. Executive Presentations
7. Awareness Sessions
8. Training
9. Posters
10. Lunch and Learn
11. Surveys
12. Questionnaires
13. Assessments
14. Whitepapers
15. Plan

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**Who was involved?**

**Everyone!**

Because it's all about people. Even the best processes and technologies will fail without commitment.

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**Educated Management on HPWS**

- Selective hiring
- Extensive training
- Employment security
- Measurement of management practices
- Teams
- High Performance Work Systems
- Compensation
- Reduced status distinctions
- Information sharing
- High quality work
- Transformational leadership

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**Interviewed All of the Staff**

**Identified top 3 strengths in the organization**
- Very knowledgeable people
- Great communication within groups, teamwork
- Escalation procedures

**Identified top 3 weaknesses in the organization**
- Limited training/education
- Poor communication between groups
- No Centralized repository of information

**Identified top 3 improvements that can enhance QoS**
- Understand customer expectations SLAs
- Standard procedures across all customers and groups
- Better communication

**Identified top 3 threats from poor quality of service**
- Customer dissatisfaction
- Loss of jobs
- Remain in fire fighting, break fix mode
Developed Customized ITIL/ITSM Awareness Sessions

Monitored ITSM ITIL Awareness and Knowledge

After Session 1

After Session 2

After Session 3

Developed a Nine Phase ITSM Tool Migration Plan

Phase 1

Phase 9

Selected The Service Management Tool

Modeled "As is" Resolution Workflow
You must know *where you are* before you can determine how to get to *where you want to be*.

...and I can predict how you will behave.
Used the ITSM Process Workbooks

**Processes**

- Aren't the processes already defined in ITIL?
- Does everyone really understand the ITIL?
- How do you validate the processes?
- Will anyone read the documentation?
- How do you ensure quality? ISO documentation standard
- Spreadsheets
- Templates

1. Revision History
2. Process Overview
3. Questionnaires
4. S.W.O.T Analysis
5. Baseline
6. T.I.M.E Best Practices
7. Vision, Mission, Objectives, Scope
8. Logical Process Workflows
9. Physical Process Workflows
10. Process Interdependencies
11. Work instructions (Procedures)
12. Roles and Responsibilities
13. Metrics and Key Performance Indicators

**Defined Service Level Requirements**

**Defined Service Design Criteria For Each Service Level**

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<th>Description</th>
<th>Model</th>
<th>Minimum</th>
<th>Maximum</th>
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<th>Uptime</th>
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Total Average Availability Percentage is 99.94%
SLAs Were Mapped To Customers and Support Groups

![Diagram showing SLA mapping](image)

### Reliability

- Reliability of 1 means no failure
- Failure = 1 - R

Reliability of a serial system is:

\[
R(A, B) = r_A \cdot r_B = 0.9 \cdot 0.8 = 0.72
\]

Reliability of a parallel system is:

\[
R(A, B) = 1 - (1 - r_A) \cdot (1 - r_B) = 1 - (1 - 0.9) \cdot (1 - 0.8) = 0.98
\]

- R << r_{min}

### Defined Proactive Problem/Availability Management

- Defined proactive problem/availability management

![Graph showing exponential failure probability density function](image)

The likelihood of a device prematurely failing within 1 year of being put into service, if the MTBF is 43,800 hrs (about 5 years):

\[
f(t < t1) = 1 - e^{-t1 / MTBF}
\]

- f(t < 8760) = 0.00872

### What is the Availability of the Service?

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The probability that the service will be available within:

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<th>Day 1</th>
<th>Month 1</th>
<th>Year 1</th>
<th>Year 2</th>
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### Intranet

- Intranet

### Internet

- Internet

### E-mail

- E-mail

### Service Desk

- Service Desk

### Primary Services

- SAP, SAP, BW, Log

### Supporting Services

- Windows NT, Net, Hot Services

### Business Processes

- Business Processes

### Technology

- Technology

### Reliability of parallel system:

\[
R(A, B) = 1 - (1 - r_A) \cdot (1 - r_B) = 1 - (1 - 0.9) \cdot (1 - 0.8) = 0.98
\]
Instituted a CIO/IT Balanced Scorecard

Service Portfolio Scorecard (RAG)

Key Performance Indicator

- Flexibility — can easily be modified to meet changing business needs
  - Support customer relationship management (CRM)
  - Able to support the fast introduction of new technologies
  - Able to support new ways for customers to interact with us
  - Able to support customer self-service

- Scalability — can handle anticipated short-term and long-term growth
  - Can support doubling of transaction volumes w/o redesign
  - Can support fivefold increase in transaction volumes w/o redesign

Other Characteristics

- Reliability
  - Operationally cost-efficient

= Service is capable
= Can be made capable in the short term
= Not practical to make capable

Achieved the IT Service Management Vision

Lessons Learned

- Get Management Commitment, Congruence and Continuity
- LEADERSHIP: Lead the ITS M Initiative
- Build a Very Strong Team that is results driven
- Build a Strong Vision, Mission, Objectives, Action Plans and plan for quick wins
- Don’t let anyone fool you into thinking that this is a multi-year, multi-million dollar project
Motivational Quotes

“**You must be the change you wish to see in the world**”, Mahatma Gandhi

“We’ll stop changing when our customers do”, Cal Hart - VP Business Transformation, Canada Post Corporation

“Progress is a nice word. But change is its motivator. And change has its enemies.”, Robert F. Kennedy

“Ah, but a man’s reach should exceed his grasp, or what’s a heaven for”, Robert Browning

“If you don’t change you’ll smell”, my Mother

Thank you
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