ITIL 2011 - An Invitation to review and discuss the impact to IT Service Management

BCS London

Monday 24 October 2011
Agenda

• The ITIL® Update 2011
  – Shirley Lacy

• Forensic Analysis Samples
  – Chris Finden-Browne

• Case Study: Service Asset & Configuration Management
  – Brian Scott

• ITIL 2011 – ITSMTV insights
  – Barclay Rae

• Panel Session
The ITIL® Update 2011
Shirley Lacy, ConnectSphere
ITIL Update 2011 – Themes in 2007

- Transformation
- Focus on value delivery
- Global sourcing
- Changing architectures
- Managing complexity
- Converging governance and management
ITIL Update 2011 – Why improve ITIL?
ITIL Update 2011 - The Project

ITIL Update Project Board

- Project Manager, TSO
- Team Manager, TSO

Advisors to the Project Board

Reviewers

Project Mentors

Project Authors
## ITIL Update 2011

### Project mentors and authors

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<tr>
<th>Assignment</th>
<th>Authors</th>
<th>Mentor</th>
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<tr>
<td>Overall</td>
<td>Shirley Lacy</td>
<td>Shirley Lacy</td>
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<tr>
<td>Technical Continuity</td>
<td>Ashley Hanna</td>
<td>Ashley Hanna</td>
</tr>
<tr>
<td>Service Strategy</td>
<td>David Cannon</td>
<td>David Wheeldon</td>
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<td>Service Design</td>
<td>Lou Hunnebeck</td>
<td>Colin Rudd</td>
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<td>Service Transition</td>
<td>Stuart Rance</td>
<td>Colin Rudd</td>
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<td>Randy Steinberg</td>
<td>Colin Rudd</td>
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<td>Continual Service Imp.</td>
<td>Vernon Lloyd</td>
<td>David Wheeldon</td>
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<td>Official Introduction</td>
<td>Anthony Orr</td>
<td>Shirley Lacy</td>
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</tbody>
</table>
ITIL Update 2011 – Project approach

- Simplify and standardise
- Re-use and cross reference
- Consistent structure
- Signpost
ITIL Update 2011 – Project scope

Out of scope
new concepts invalidating the use of ITIL

Resolve
errors inconsistencies

Ease of use
clearer more consistent
ITIL Update 2011 – What’s in it for you?

Service strategy, concepts and language are clearer

Consistent processes with more examples

Roles, skills, functions, organisation + examples
ITIL Update 2011 – What’s in it for you?

- Interfaces and integration
- Performance measurement better
- Current trends: Cloud, sustainability, virtualisation
Christiane Chung, Ah Pong, NCS PTE LTD (Singapore)

• 'The update has added clarity and consistency amongst the five books and it has improved the ease of readability and understanding for users.'

Helen Sussex, Logica

• 'Strategy is now so much more accessible. It flows, it links and it is now joined to the other stages of the lifecycle so much more effectively.'
ITIL Update 2011
Enabling improvement

Qualification scheme and training experience

Adaption and adoption of best practices

To deliver great service
Thank you all

Contact details:
Shirley Lacy, ConnectSphere
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Phone: 0845 838 2345
www.connectsphere.com

To see the ITIL Change control log, see

Further information is available at:
www.best-management-practice.com
Forensic Analysis Samples
Chris Finden-Browne, IBM, SMSG Chair

Demand Management
Service Portfolio Management
ITIL Roles
Demand Management
Process Definitions from the respective glossaries

• 2007 (a)
  – Activities that understand and influence Customer demand for Services and the provision of Capacity to meet these demands. At a Strategic level Demand Management can involve analysis of Patterns of Business Activity and User Profiles. At a Tactical level it can involve use of Differential Charging to encourage Customers to use IT Services at less busy times.

• 2011 (b)
  – The process responsible for understanding, anticipating and influencing customer demand for services. Demand management works with capacity management to ensure that the service provider has sufficient capacity to meet the required demand. At a strategic level, demand management can involve analysis of patterns of business activity and user profiles, while at a tactical level, it can involve the use of differential charging to encourage customers to use IT services at less busy times, or require short-term activities to respond to unexpected demand or the failure of a configuration item.

• Difference
  – Key differences are in this text

(a) ITILV3_Glossary_English_v1_2007.pdf    (b) ITIL_2011_English_glossary_v1.0.pdf
Demand Management
Activities, roles and outputs

• 2007 – Concepts
  – Activity-based Demand Management
  – Business activity patterns and user profiles
  – Service packages

• 2007 – Roles
  – (None)

• 2007 – Outputs
  – Service Package
    - Contains Service Level Package(s)

• 2011 – Activities
  – Identify sources of demand forecasting
  – (Define) Patterns of Business Activity (PBA)
  – (Define) User Profiles (UP)
  – (Execute) activity-based demand management
  – Develop differentiated offerings
  – Management of operational demand

• 2011 – Roles
  – Demand management process owner
  – Demand management process manager

• 2011 – Outputs
  – User profiles
    – Patterns of business activity formally documented and included in the service and customer portfolios
  – Policies for management of demand when resources are over-utilized
  – policies for how to deal with situations where service utilization is higher or lower than anticipated by the customer
  – Documentation of options for differentiated offerings that can be used to create service packages

( ) is used to indicate a verb added by the author to the activity name given in the ITIL book.
Demand Management
Notable Related Glossary Definitions

• 2007 (a)
  – Service Level Package
    - A defined level of Utility and Warranty for a particular Service Package. Each SLP is designed to meet the needs of a particular Pattern of Business Activity.
  – Service Package
    - A detailed description of an IT Service that is available to be delivered to Customers. A Service Package includes a Service Level Package and one or more Core Services and Supporting Services.

• 2011 (b)
  – service level package
    - See service option
  – service option
    - A choice of utility and warranty offered to customers by a core service or service package. Service options are sometimes referred to as service level packages.
  – service package
    - Two or more services that have been combined to offer a solution to a specific type of customer need or to underpin specific business outcomes. A service package can consist of a combination of core services, enabling services and enhancing services. A service package provides a specific level of utility and warranty. Customers may be offered a choice of utility and warranty through one or more service options. See also IT service.

(a) ITILV3_Glossary_English_v1_2007.pdf    (b) ITIL_2011_English_glossary_v1.0.pdf
Demand Management
Overall observations on 2011:2007 differences or gaps

PRIMARY

• What was a very conceptual discussion now provides significantly clearer and more explicit discussion of likely process content
• Process now clearly operates over complete strategic, tactical and operational range
• Linkage with Capacity Management strengthened
• Roles added – larger organizations would need to spawn more roles below ‘manager’

SECONDARY

• 2007 – Confusion between ‘service package’ and ‘service level package’ removed
• 2011 – New ‘service package’ definition of “two or more services” does not match general industry usage well
Service Portfolio Management
General Observations on 2011:2007 differences or gaps

• No “big” changes/shifts – more evolutionary, refinements
• More clarity on service portfolio as a definition of what it is/should be.
• Service models as a new term used in this process
• Process activity change in “approve” activity -> new “change proposal”
• New deep dive into “process initiation”
• New process diagram (nothing in 2007)

• 2011
  – Service models
    - A model that shows how service assets interact with customer assets to create value.
      Service models describe the structure of a service (how the configuration items fit together) and the dynamics of the service (activities, flow of resources and interactions). A service model can be used as a template or blueprint for multiple services
ITIL Roles and Role Model

2007
- Generic roles
  - Process owner (ST, SD, CSI)
  - Service owner (ST, CSI)

2011
- Generic roles
  - Service owner role
  - Process owner role
  - Process manager role
  - Process practitioner role
ITIL Process Roles

2007

- Incident Management
  - Incident Manager
  - First line
  - Second line
  - Third line
- Change Management
  - Change Authority
  - Change Manager
  - (Change Advisory Board)

2011

- Incident Management
  - Incident management process owner
  - Incident management process manager
  - First-line analyst
  - Second-line analyst
  - Third-line analyst
- Change Management
  - Change management process owner
  - Change management process manager
  - Change initiator
  - Change practitioner
  - Change authority
  - CAB member
  - CAB chair
Practitioner's case study of "on the ground" implementing the updates to the Service Asset and Configuration Management component of his current Integrated Service Management project.

- Drivers for Review
- Method
- SACM Plan
- Asset Management
- CMS and the CMDB
- Progress and next steps
Drivers for the Review of ITIL 2011 for SACM

Are the changes enough to require re-implementation? What were some of the issues/confusion from 2007? And were they addressed?

External client requires close mapping to model based on best practice
- Drivers from client in a service management integration capacity, what are my suppliers doing?

Internal client wants to know if changes are significant
- Drivers from compliance, drivers from opportunity, we are 2011!

Consultant wants to see if changes will help improve implementation of SACM and on-boarding of new SACM Manager
- Had a check to see what the vendors are doing and what their road paths may be
- Personally I'm looking for ITIL 2011 to back me up on certain policies and provide me a better way to communicate the business case.
- Configurations are fragmented and SACM provides a means to link these, provide governance and steer commonality
- New manager struggled with this at first as he was used to his CM activities being limited to inventory and checklist style.
Method

Practical impact is probably going to be on documentation and toolsets - Reference

Impacted deliverables

What resources needed for ground level re-education and training? – reference targets

for training and educating

What's the rush? How to pick and choose? - Identify time scales and MoSCoW

How to progress? Obvious way – get old book and new (have access to online) and look

through it line by line

Produce a spreadsheet and identify key areas of service documentation that need

addressed and on key messages for education

Identify the deliverables that need updating

• For the Client

  • Focus on the SACM Plan
  • Focus on asset management process

• For on-boarding of new SACM Manager and Ops team

  • Focus on key message around multiple CMDBs and clarification of CMS
Method - Example of Glossary comparison worksheet

<table>
<thead>
<tr>
<th>Term</th>
<th>ITIL 2011</th>
<th>ITIL 2007</th>
<th>Document Update</th>
<th>Role education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Asset and Configuration Management</td>
<td>(ITIL Service Transition) The process responsible for ensuring that the assets required to deliver services are properly controlled, and that accurate and reliable information about those assets is available when and where it is needed. This information includes details of how the assets have been configured and the relationships between assets. See also configuration management system.</td>
<td>(Service Transition) The Process responsible for both Configuration Management and Asset Management.</td>
<td>SACM Plan, Process Guide, Procedure/Local Working Instructions</td>
<td>Service Delivery Manager</td>
</tr>
<tr>
<td>Configuration Management System</td>
<td>(ITIL Service Transition) A set of tools, data and information that is used to support service asset and configuration management. The CMS is part of an overall service knowledge management system and includes tools for collecting, storing, managing, updating, analysing and presenting data about all configuration items and their relationships. The CMS may also include information about incidents, problems, known errors, changes and releases. The CMS is maintained by service asset and configuration management and is used by all IT service management processes. See also configuration management database.</td>
<td>(Service Transition) A set of tools and databases that are used to manage an IT Service Provider's Configuration data. The CMS also includes information about Incidents, Problems, Known Errors, Changes and Releases; and may contain data about employees, Suppliers, locations, Business Units, Customers and Users. The CMS includes tools for collecting, storing, managing, updating, and presenting data about all Configuration Items and their Relationships. The CMS is maintained by Configuration Management and is used by all IT Service Management Processes. See Configuration Management Database, Service Knowledge Management System.</td>
<td>CI Owners, SACM Manager</td>
<td></td>
</tr>
<tr>
<td>Configuration Management Database</td>
<td>(ITIL Service Transition) A database used to store configuration records throughout their lifecycle. The configuration management system maintains one or more configuration management databases, and each database stores attributes of configuration items, and relationships with other configuration items.</td>
<td>(Service Transition) A database used to store Configuration Records throughout their Lifecycle. The Configuration Management System maintains one or more CMDBs, and each CMDB stores Attributes of CIs, and Relationships with other CIs.</td>
<td></td>
<td></td>
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## Method - Example of line by line check worksheets

<table>
<thead>
<tr>
<th>Change</th>
<th>Change Impact</th>
</tr>
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<tbody>
<tr>
<td>Goals in 4.3.1 have been dropped - but old text is sort of integrated to whole section</td>
<td>Minimal</td>
</tr>
<tr>
<td></td>
<td>Ignore</td>
</tr>
<tr>
<td>The scope is noticeably different in that asset management is mentioned as fixed assets and it is made clear that Service Assets include CIs and Assets and that some Service Assets are not CI's</td>
<td>It gets close to covering the asset management process – but not fully</td>
</tr>
<tr>
<td></td>
<td>but we do this seperately anyway so maintain our adapted configuration and asset management distinct processes</td>
</tr>
<tr>
<td>The value to the business distinctly mentions fixed assets – all good in reinforcing sacm covering CI, Service Assets and Assets (fixed)</td>
<td>Update to glossaries and reference sections of process documentation</td>
</tr>
<tr>
<td></td>
<td>process documents, SACM Plan - good for strengthening business case and educating staff</td>
</tr>
<tr>
<td>Basic concepts have changed to really get the message across on the differences and relationships between service assets and CIs and non-CIs.</td>
<td>may need to include in documents</td>
</tr>
<tr>
<td></td>
<td>which I will use to again how “official” sanction for the CMS being multiple CMDB's and allowing different areas (tech teams config documentation) to all be part of SACM and Change managed configuration records.</td>
</tr>
<tr>
<td>There is a new diagram next as fig 4.8</td>
<td></td>
</tr>
<tr>
<td>There is mention that asset info is held within CMS but that fixed asset for financial is outside</td>
<td>minimal as already doing this</td>
</tr>
<tr>
<td></td>
<td>reinforce SACM policies</td>
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Service Asset & Configuration Management Plan

- Personally I'm looking for ITIL 2011 to back me up on certain policies and provide me a better way to communicate the business case.
- Configurations are fragmented and SACM plan provides a means to link these, provide governance and steer commonality as a deliverable enforceable document.
- New manager struggled with this at first as he was used to his CM activities being limited to inventory and checklist style.
- New statement from 2011 enforces wider SACM role and impact –
  - “The development and implementation of a SACM policy forms the basis for a functioning service asset and configuration management process. All changes to service assets and configuration items must be authorized and controlled via the change process. Adherence to this policy is the key, critical factor in a successful service management organization.”

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<tr>
<td>Next key change, although still qualified as not prescriptive, is the SACM plan. No mention of CM plan now it must be &quot;SACM&quot; Plans</td>
<td>already written as SACM plan</td>
<td>This is good as again it helps me guide perception as to responsibilities of CM for the SACM team and wider Service Delivery</td>
</tr>
<tr>
<td>SACM Plan template - Noted how financial asset management has become fixed asset management and also how the Reference implementation plan statement has been removed</td>
<td>SACM Plan will need adjusted</td>
<td>Implementation plan was better off with PMO anyway</td>
</tr>
</tbody>
</table>
CMS and the CMDB – Multiple CMDB message enhanced

There is a new diagram next as fig 4.8

There is mention that asset info is held within CMS but that fixed asset for financial is outside

My favourite view which used to be 4.8 example of a CMS has now been replaced by a simpler model

Another key point added to the example of multiple CMDBs

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<tr>
<td>There is mention that asset info is held within CMS but that fixed asset for financial is outside</td>
<td>minimal as already doing this</td>
<td>reinforce SACM policies</td>
</tr>
<tr>
<td>My favourite view which used to be 4.8 example of a CMS has now been replaced by a simpler model</td>
<td>old view used in official documentation</td>
<td>But this is actually not too bad – I can use to reiterate higher level variance between CMDB, CMS, SKMS and business databases.</td>
</tr>
<tr>
<td>Another key point added to the example of multiple CMDBs</td>
<td>minimal</td>
<td>useful as this is the most used data but not usually recognised as a cmdb - Ideally, the service desk will have access to a single federated CMDB.</td>
</tr>
</tbody>
</table>
CMS and the CMDB
Asset Management

The previous version then covered DML etc but this has now been moved into a new distinct Asset Management section with a slightly modified view of the relationship between DML and CMDB. SACM Plan will need adjusted. Although the section is not huge it clearly covers what a lot of us will recognise as the asset management process – similar but different enough to CM process to be represented here I believe.

Software asset management gets a distinct mention but quickly ties this to ISO/IEC 19770 as an ideal. Policy needs adjusted. I’m in total support of this...ITIL is a framework and best practice and goes hand in hand with a standards based maturity approach, ITIL does not attempt to cover all of this on its own.
Next Steps and Key Messages

If something is communicated more clearly the message will be taken in and acted on more effectively

Next steps

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Triggers, inputs, outputs and interfaces is expanded upon with a bullet list for each point</td>
<td>significant</td>
<td>this is significant as bullet points of focus compliance and requirement drivers – it’s easy to see – I want that list! Service delivery transition plan and compliance checklists/reporting for client.</td>
</tr>
<tr>
<td>In information management there is a new paragraph – The CMS includes pointers to knowledge and information assets that are stored in the SKMS, and it is important to maintain these links and to verify their validity as part of regular audits. SACM is responsible for the maintenance of many knowledge and information assets within the SKMS, and these must be maintained with the same level of control as the CMS. Many organizations enforce separation of duties to ensure that anyone who can update the CMS cannot update the actual assets in the SKMS, to provide a higher level of assurance about the integrity of their assets.</td>
<td>further guidance and evidence for moving Knowledge Management outside of SACM</td>
<td>This is interesting again as I try to ensure an SACM manager/team are comprehensive in coverage, but this clearly tries to ensure separate individual/group deal with SKMS.</td>
</tr>
<tr>
<td>4.3.8 is a more formal tick list structure linking KPIs to a CSF rather than descriptive measure examples.</td>
<td>4.3.8 is changed in a way which could impact our current deliverables. Policies and Plans</td>
<td>I would recommend using both and then some:-) - it will help to improve reporting</td>
</tr>
</tbody>
</table>

Interfaces with other processes e.g.

If SS has improved will there be more visible activity and requirements to instantiate this in day to day IT delivery?

So in summary I like the changes – more in keeping with my view of a framework which is also formal and structured to allow clear communication to design and implementers alike.
04

ITIL 2011 – ITSMTV insights
Barclay Rae, Independent Consultant, itsm TV
Consulting, Mentoring + Troubleshooting
Service Management, Service Desk
Service Catalogue + SLAs
400 Service Management projects
Service Desk + ITSM ops management
Consulting since 1994
E2E, SDI/HDI, itSMF, APMG, Axios
Media + Research

www.barclayrae.com
www.itsmtv.co.uk
www.itsmwprow.co.uk
ITSMTV – ITIL2011 Feature

- September Special Feature
- Key Industry Interviews
- Discussion pieces
- Background research

- Content live at www.itsmtv.co.uk
Who’s saying what..?

“I don’t know why it took so long… The Industry is crying out for more practical guidance”
Stephen Mann
Forrester

“Some people may find the extra pages challenging”
Matthew Burrows
BSM Impact

“It’s been a successful update… The Industry seems to like it.”
Richard Pharro
APMG

“There’s some great templates… We need more practitioner input”
Malcolm Fry
Independent Consultant
Key points on the update

• Clear disparity of interest / opinion across the industry – depending on agenda/position
• Distinction between issues with the content and with the approach
• Training / accreditation industry generally pleased with new content
• Consulting / analyst community less happy
• No real feedback yet from practitioners
Feedback

- Took too long
- Not enough practitioner input
- Not involving new developments quickly enough
- ‘Too much too late’ - too long
- Not transparent
- Commercial drivers

- More consistent
- Reads better
- Improved graphics
- Good templates – Incident, Problem, Change
- Strategy much improved
- BSM good addition
Any Questions?

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www.barclayrae.com

www.itsmtv.co.uk