

# **Project Managers and Service Managers - enemies or close friends?**

# Project Management, Service Management and ISO/IEC 20000-1

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# Agenda

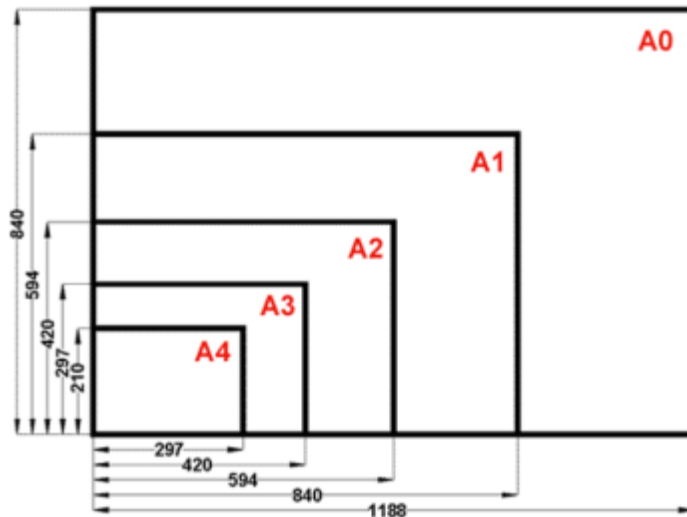
- Introduction to ISO/IEC 20000-1
- Why service managers require a level of ability in project management techniques
- What project managers need to understand about services and service management
- Specific requirements in ISO/IEC20000-1 for close integration between project management and service management
- Q&A



# Introduction to ISO/IEC 20000-1

# Standards impact our lives

## International standards



## Regional and National standards



## Impact of no standards



# Different types of standards

- Requirements – SHALL, Auditable for conformity, Certifiable
  - E.g. ISO/IEC 20000-1
  - ISO/IEC 20000-1 specifies what to do
  - You decide how to do it - Use any method or technology
- Guidance to support the requirement standards – SHOULD
  - E.g. ISO/IEC 20000-2/3/5/7/10/11
- Measurement models e.g. maturity based models
  - E.g. ISO/IEC 33054/33074 – PRM/PAM for service mgt

# IT Services are essential to our lives

- Home schooling
- On-line shopping
- Zoom, Teams - running a business
- Banking
- Travel and holidays, print or download tickets
- Order on-line from menu in cafes/restaurants
- Report Covid test results, Track & Trace, Download Covid pass
- Etc etc .....



# What is ISO/IEC 20000-1?

- ISO/IEC 20000-1 is the international standard for service management
- It specifies requirements for a service management system (SMS)
- Scope can be services or types of services offered to customers e.g.
  - a single service, group of services, or all services;
  - IT services, cloud services;
  - technology services to support any sector or function e.g. facilities management, business process outsourcing, finance, retail, tourism, utilities
- Part of a group of management system standards (MSS)
  - e.g. ISO 9001 (quality), ISO/IEC 27001 (information security)
- Conformity based standard



# Key definitions

## **Service**

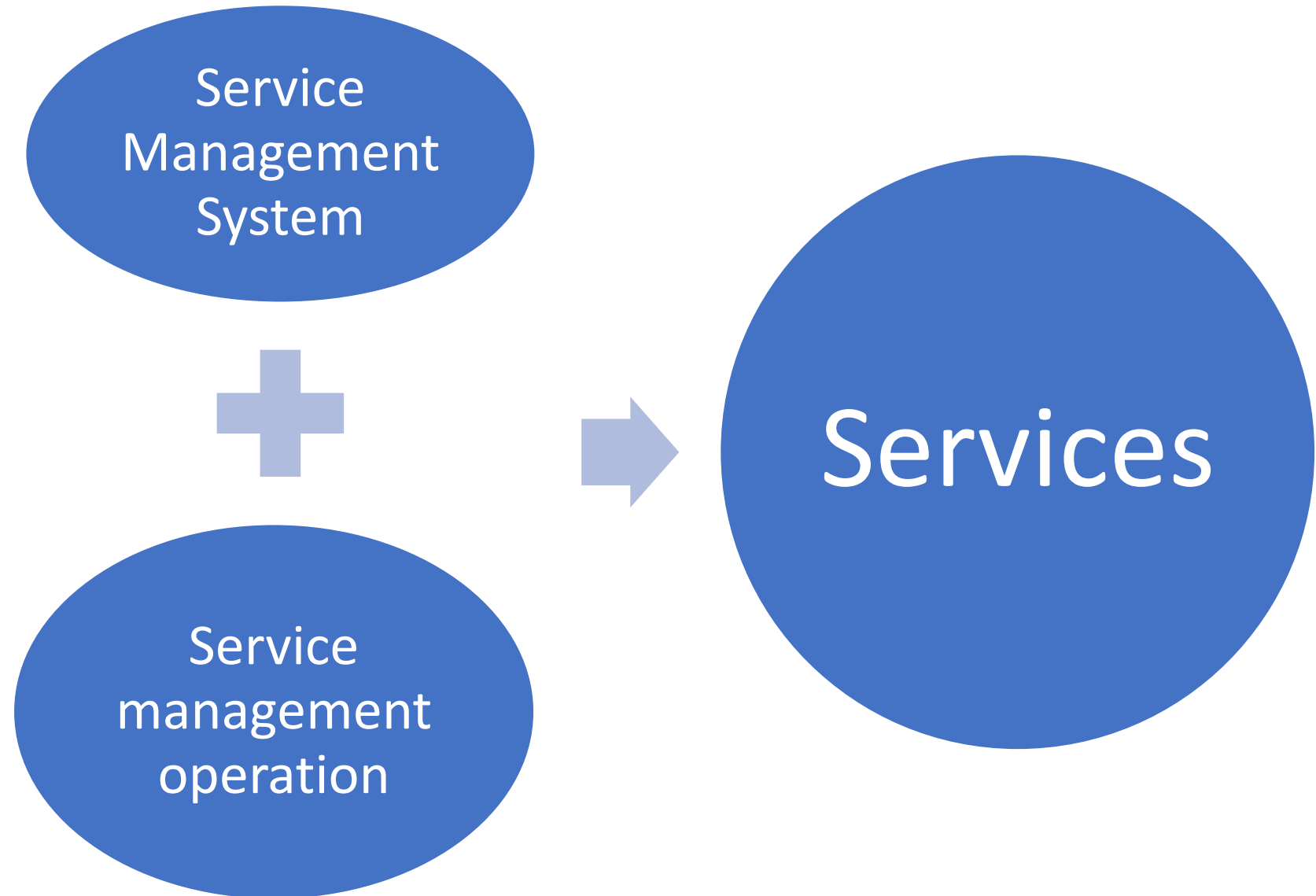
- means of delivering value for the customer by facilitating outcomes the customer wants to achieve
- Note 1 to entry: Service is generally intangible.

## **Service management**

- set of capabilities and processes to direct and control the organization's activities and resources for the planning, design, transition, delivery and improvement of services to deliver value
- Note 1 to entry: This document provides a set of requirements that are split into clauses and sub-clauses. Each organization can choose how to combine the requirements into processes. The sub-clauses can be used to define the processes of the organization's SMS.

# SMS, service management and services

- Services do not work in isolation
- They need to be designed, built and operated from the service management system (SMS)
- The SMS will drive high quality service management which will deliver excellent services
- Note – it is the SMS that is assessed for ISO/IEC 20000-1 certification, not the services



# What is the generic intended outcome of ISO/IEC 20000-1?

Introduction: ISO/IEC 20000-1 specifies **a Service Management System that supports the management of the service lifecycle, including the planning, design, transition, delivery and improvement of services, which meet agreed requirements and deliver value for customers, users and the organization delivering the services**

**Each organization also needs to develop their own intended outcomes of the SMS and the services**



# ISO/IEC 20000-1 Contents

# PDCA improvement cycle applied to ISO/IEC 20000- 1:2018

Introduction

1 Scope

2 Normative references

3 Terms and definitions

Any improvement  
methodology can be used  
e.g. Lean, Six-sigma

**Plan**

- 4. Context of the organization
- 5. Leadership
- 6. Planning
- 7. Support of the SMS

**Do**

- 8. Operation of the SMS

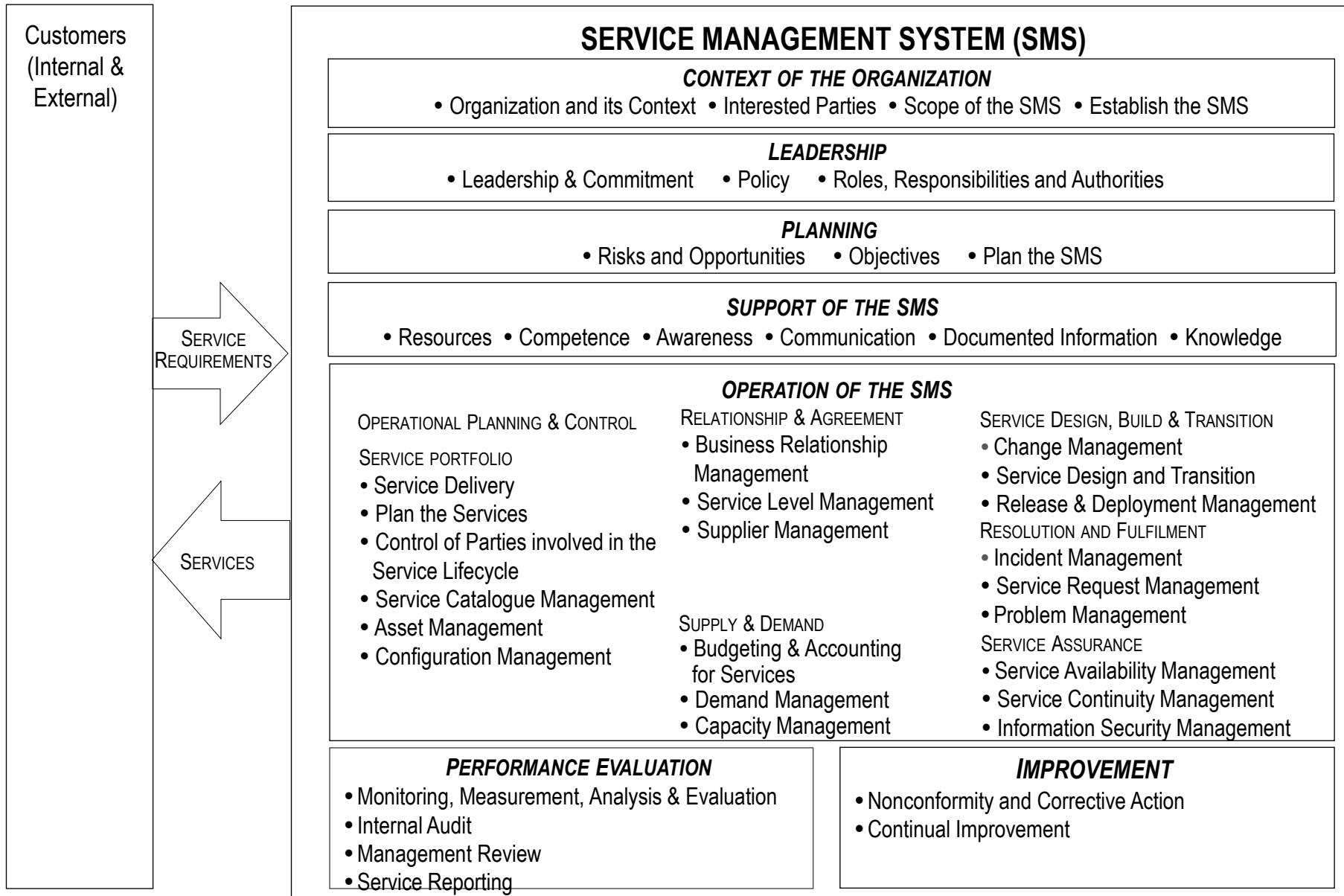
**Check**

- 9. Performance evaluation

**Act**

- 10. Improvement

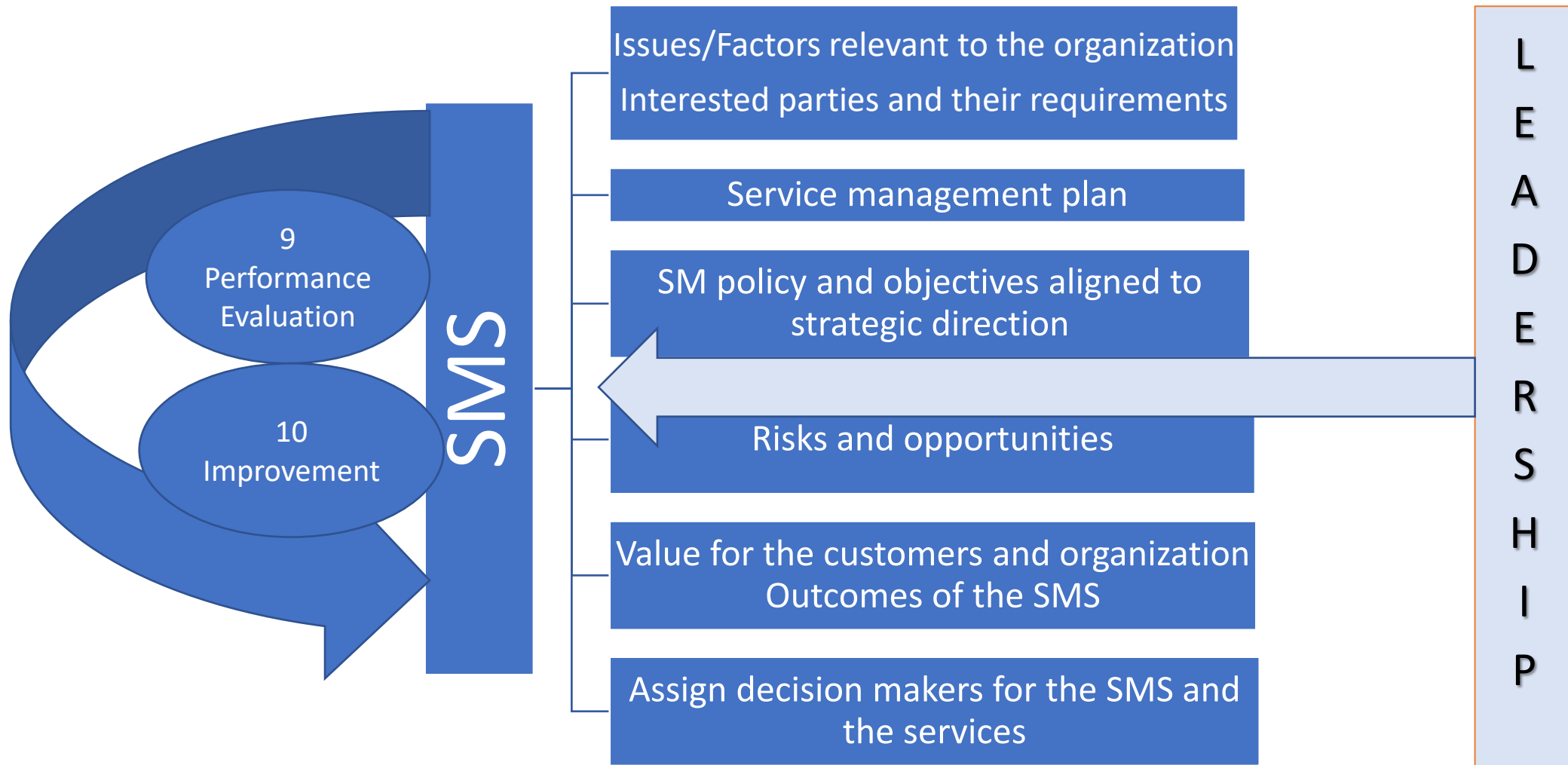
# SMS Framework from ISO/IEC 20000-1



# Leadership and commitment

- 4. Context
- 5. Leadership
- 6. Planning
- 9.3 Management review

# Top down design of strategically focused SMS

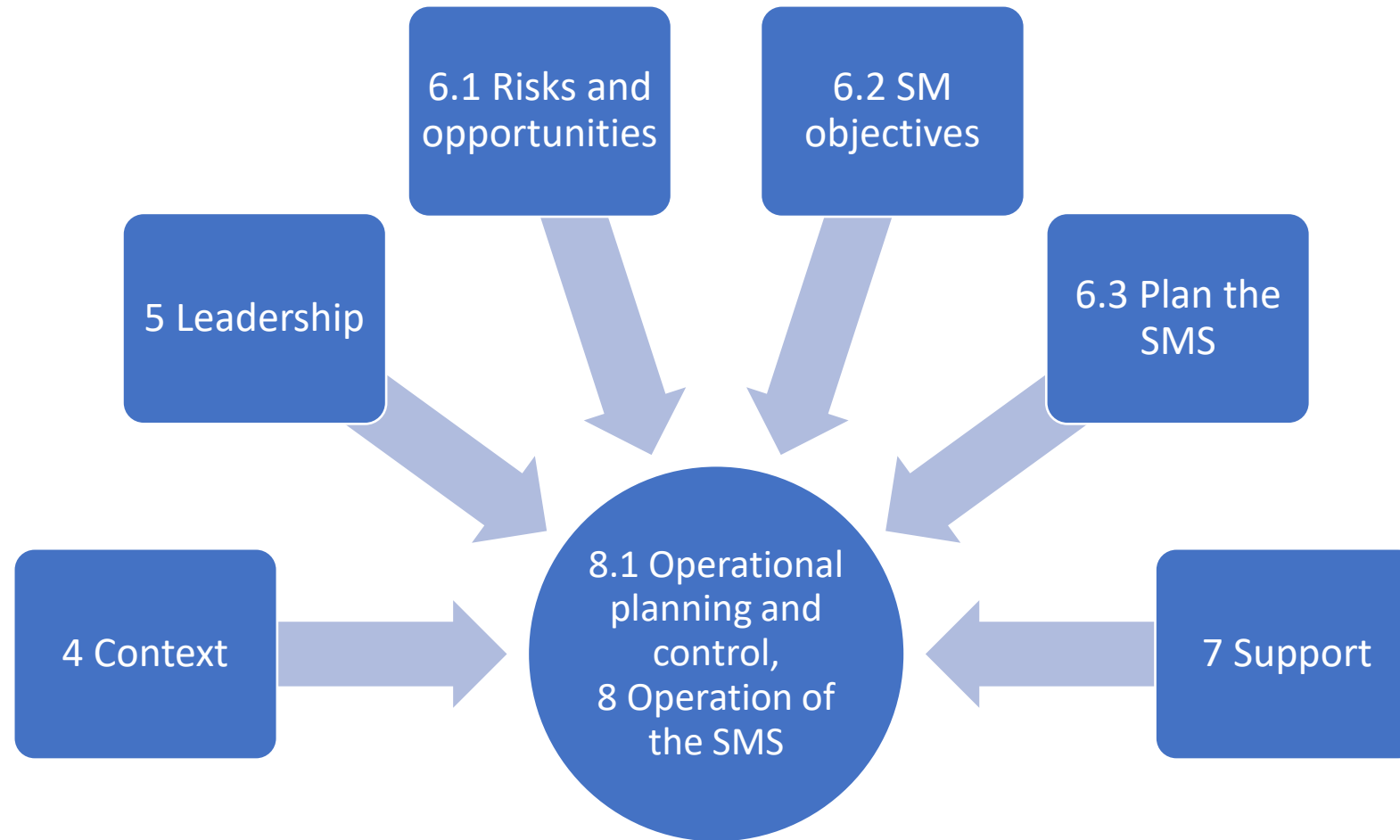




## 6.3 Plan the SMS – SM Plan is key document for the design of your SMS

- List of services in scope
- Known limitations
- Authorities and responsibilities for SMS and services
- Resources to operate the SMS and the services
- Approach for working with other parties
- Technology used to support the SMS
- How the effectiveness of the SMS and the services will be measured, audited, reported and improved
- Obligations – other standards, policies, legal and regulatory requirements etc

# 8 Operation of the SMS



# ISO/IEC 20000-1:2018 customised HLS

## **8. Operation of the SMS**

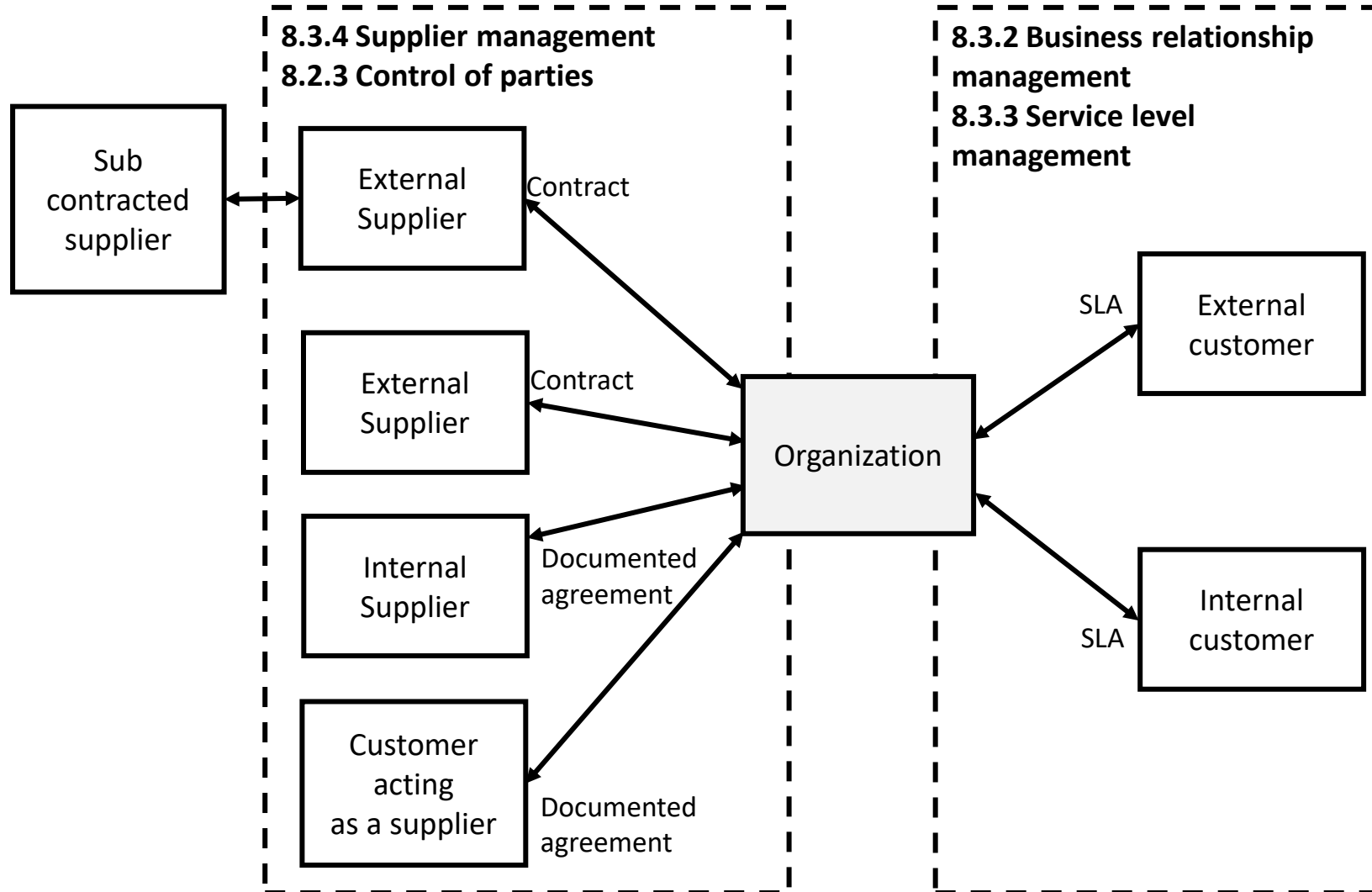
- 8.1 Operational planning and control
- 8.2 Service portfolio
- 8.3 Relationship and agreement
- 8.4 Supply and demand
- 8.5 Service design, build and transition
- 8.6 Resolution and fulfilment
- 8.7 Service assurance

## 8.2.2 Plan the services

- *Document service requirements – existing, new, change*
- *Determine criticality of services*
- *Determine and manage dependencies and duplication*
- *Propose changes to align services with SM policy, objectives and requirements, considering limitations and risks*
- *Prioritise changes and proposals for new services with business needs and SM objectives, considering available resources*

## 8.3 Relationships and agreements

### 8.2.3 Control of parties involved in the service lifecycle



# ISO/IEC 20000 Series

Standard	Publication year
Part 1, Service management system requirements	2018
Part 2, Guidance on the application of SMS	2019
Part 3, Guidance on scope definition and applicability	2019
Part 5, Implementation guidance for ISO/IEC 20000-1	2021
Part 6, Requirements for bodies providing audit and certification of service management systems	2017: Aligned with 2011 and 2018 editions of part 1
Part 7, The integration of ISO/IEC 20000-1 with ISO 9001 and ISO/IEC 27001	2019
Part 10, Concepts and vocabulary	2018
Part 11, Guidance on the relationship between ISO/IEC 20000-1 and service management frameworks: ITIL®	2021
ISO/IEC 20000 Handbook	2020
Plans for future parts on SIAM and possibly use of Agile Devops with 20000-1	2023/24?



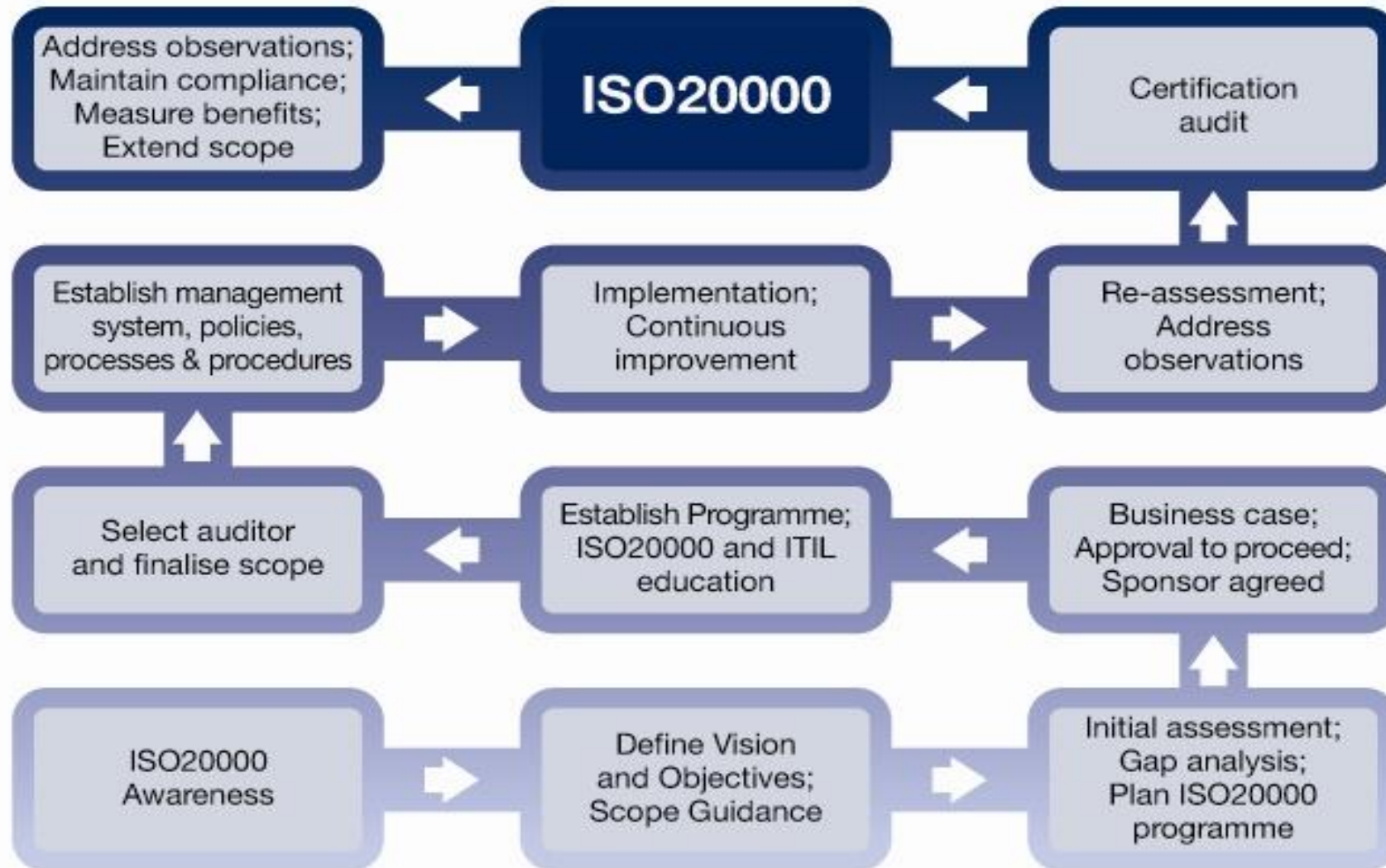
# Why service managers require a level of ability in project management techniques

# Implementing an SMS according to ISO/IEC 20000-1

- Run as a project
- Project manager required with usual project controls
- Various streams. Typically:
  - Assessment and planning
  - Create or improve the SMS
  - People
  - Certification
  - Technology (?)



# Typical stages for ISO/IEC 20000 implementation



# When are PM skills needed in service delivery

Changes

Transitions

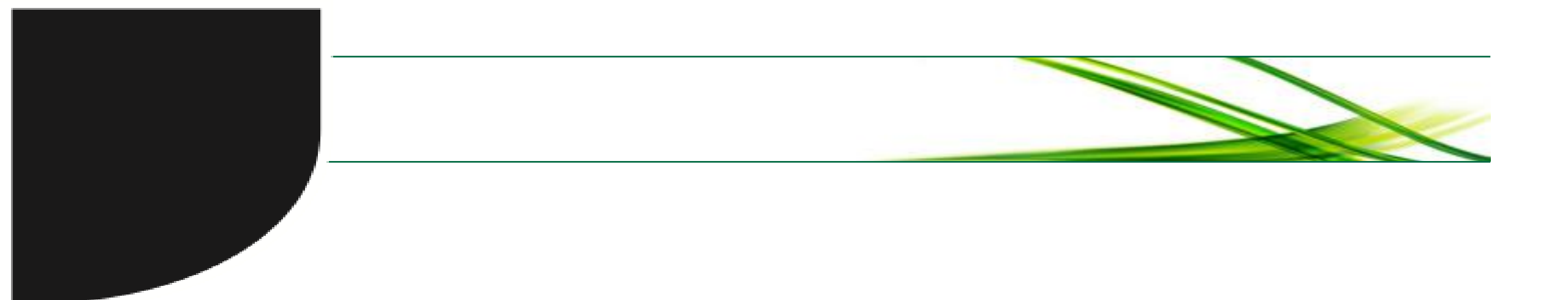
Improvements

And many other areas too!!

# Project management skills needed by service managers during service delivery



- Any PM method can be used
- Agile, Scrum, Prince, PMI, Waterfall, Lean etc. etc.



# What project managers need to understand about services and service management

# Project v Service

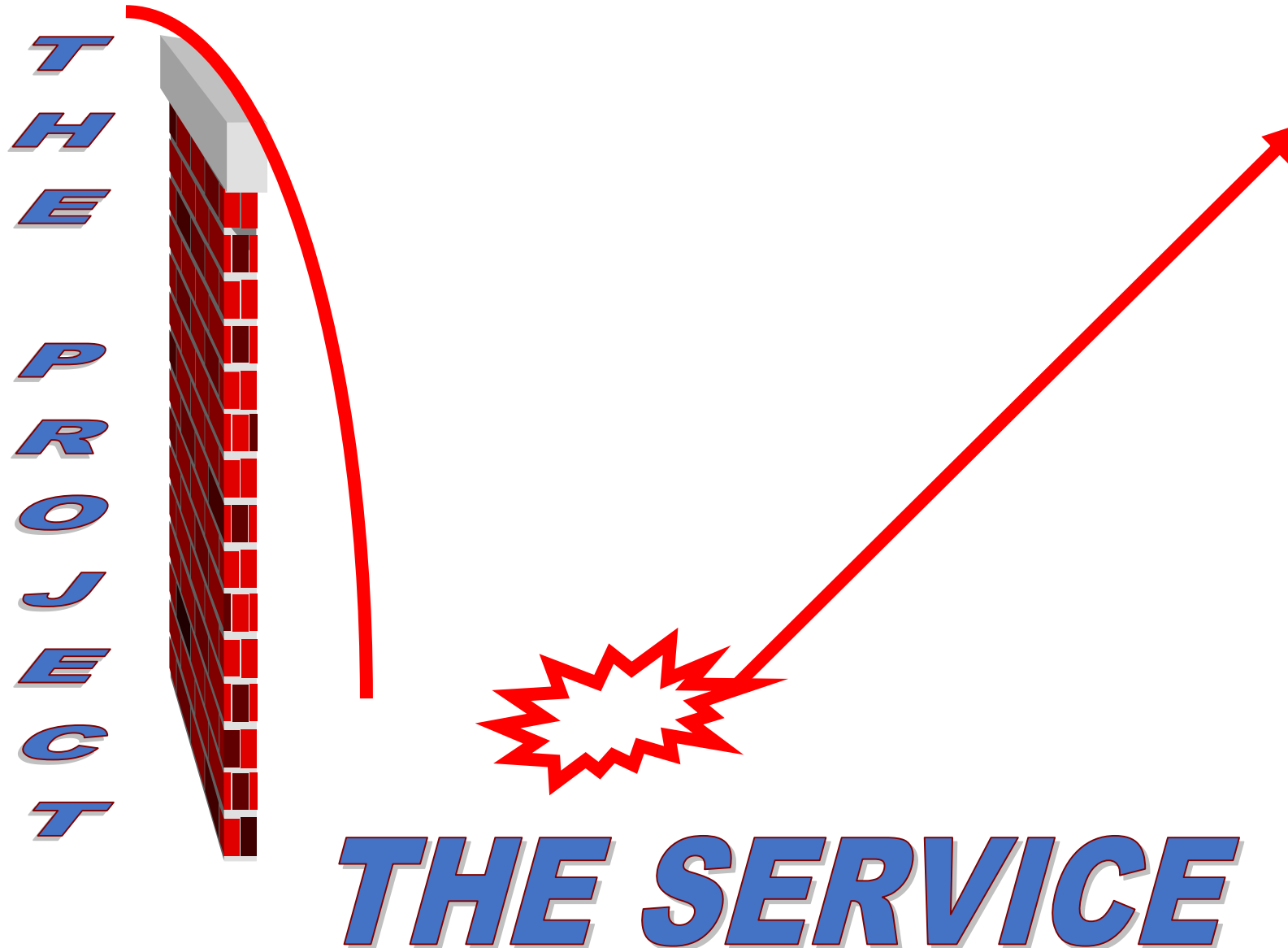
## **Project**

- Develop the system or configure the application
- Plan and budget from inception to go live
- Requirements, design, build, go live
- Possibly short warranty period
- Focus on functionality, budget and time
- Can be agile with multiple deliveries

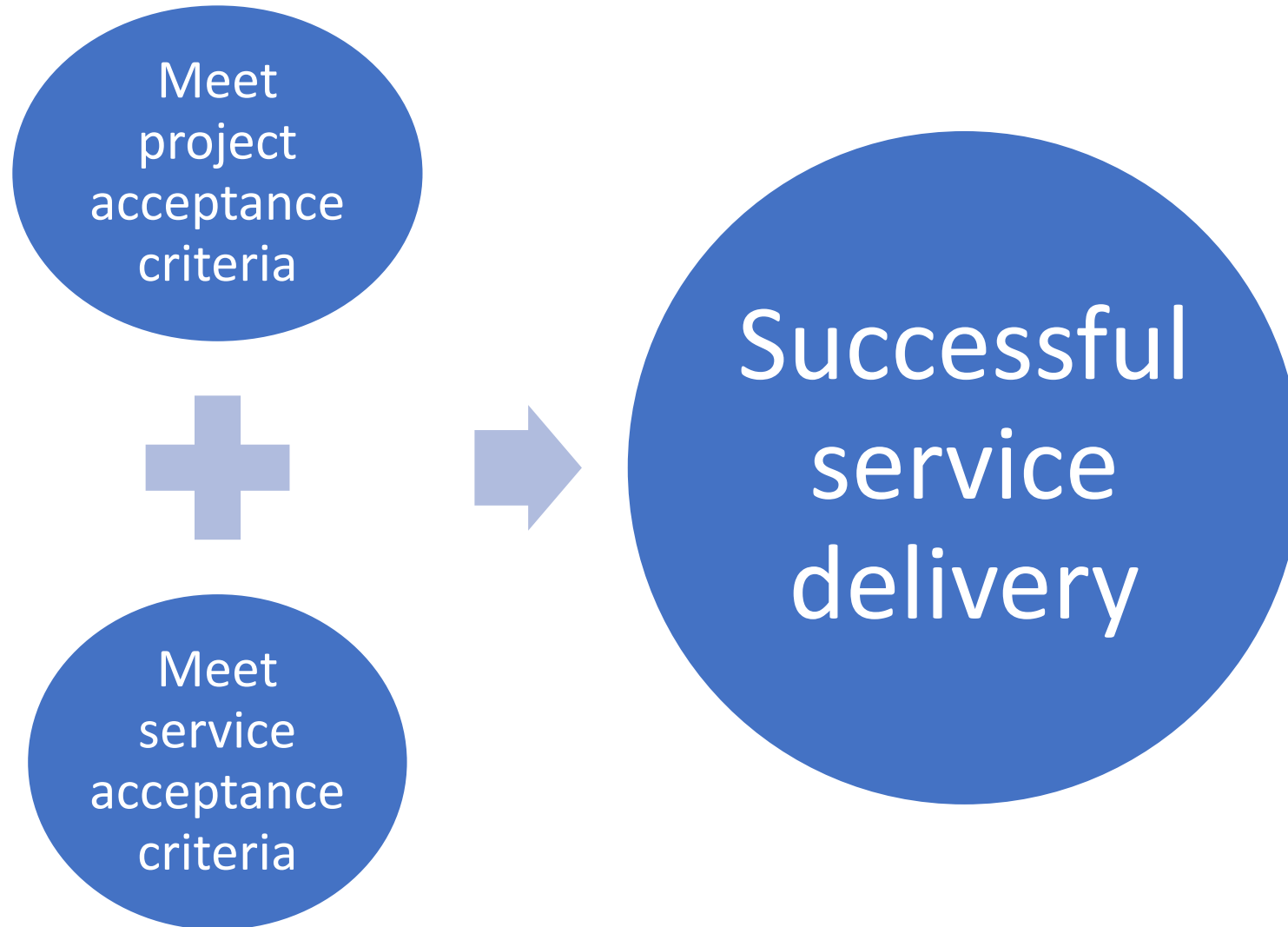
## **Service**

- Operate the system to deliver the service to end users
- Plan and budget for many years
- Focus on keeping the service operational and resilient
- Manage incidents
- Respond to changing business needs
- Manage the supply chain

# Undesirable handover from project to service



# Successful projects??



# Acceptance criteria

## **Typical Project acceptance criteria**

- Functionality
- Budget
- Time
- .....

## **Typical Service acceptance criteria**

- Documentation
- Testing complete and successful with notes of outstanding issues
- Performance tested and meets requirements
- Accessibility and availability as required
- Security built in
- Users prepared and trained
- Service level agreements in place
- Data transferred if necessary
- Technology tested and ready
- Service team trained and ready
- Suppliers ready
- .....





# Specific requirements in ISO/IEC 20000-1 for close integration between project management and service management

# Where to use PM skills and techniques in ISO/IEC 20000-1

- PM skills and techniques can be used in many places in service management
- Planning is required in many places in 20000-1:
  - Plan the SMS
  - Plan the services
  - Plan the actions to address risks and opportunities
  - Plan the actions to achieve SM objectives
  - Plan to have sufficient capacity
  - Create the service continuity plan
  - Plan to achieve the approved improvements
  - Develop audit programme and plans
  - etc

# Service design and transition process scope

It needs to be run as a project



New  
service

with the  
potential to  
have a major  
impact on  
customers or  
other services

Change  
to service

with the  
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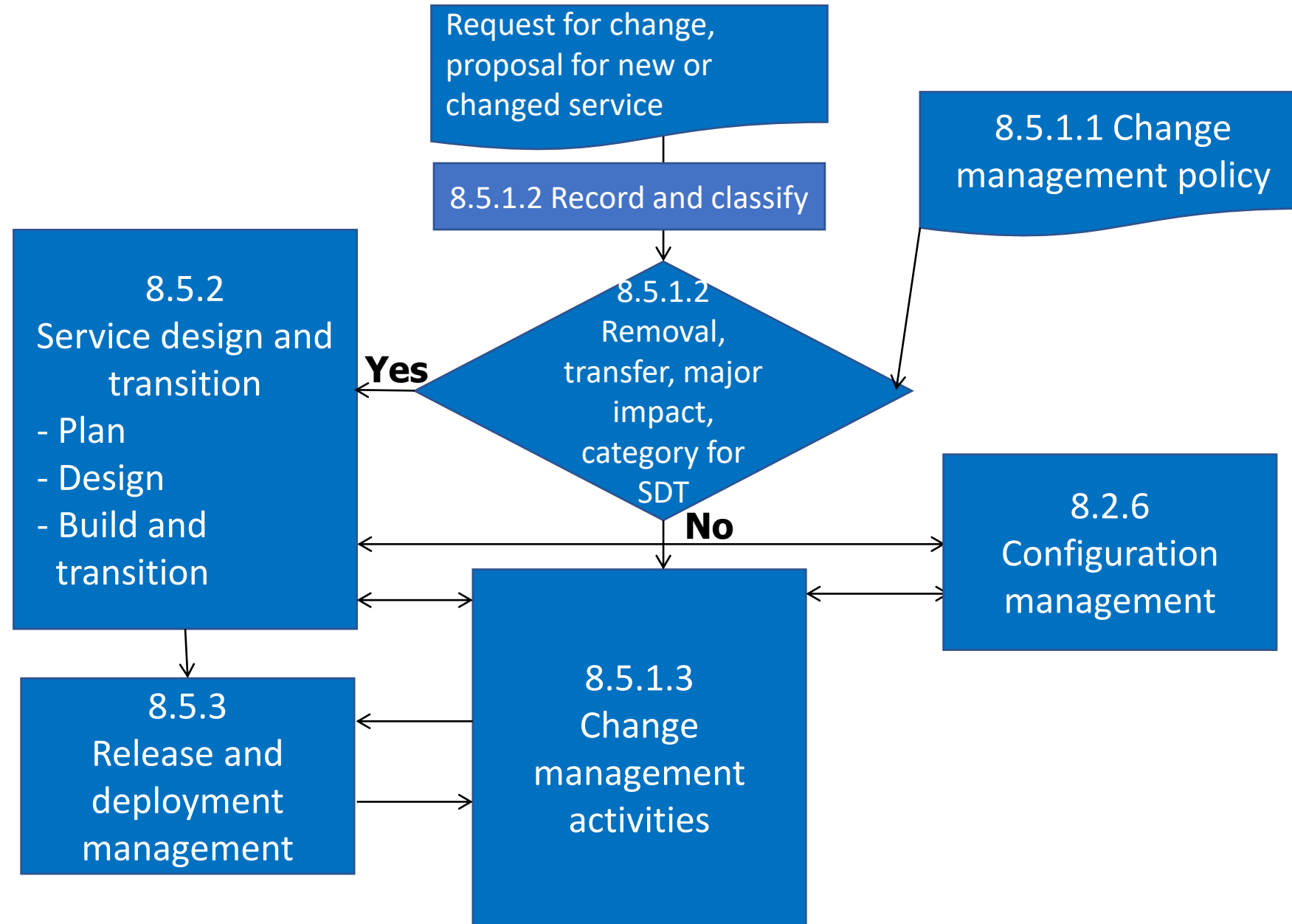
Categories of  
change that are  
to be managed by  
SDT

Remove  
or  
transfer  
of a  
service

Decommission  
a service

Transfer existing  
service in or out

# 8.5 Service design, build and transition



# Service design and transition planning requirements

- Plan the new or changed service including at least:
  - authorities and responsibilities;
  - activities to be performed by the organization or other parties with their timescales;
  - resources;
  - dependencies on other services;
  - testing;
  - service acceptance criteria;
  - intended outcomes expressed in measurable terms;
  - impact on the SMS, other services, planned changes, customers, users and other interested parties.
- Removal/decommissioning and transfer of services have additional plan contents
- Configuration item control

# Service design requirements

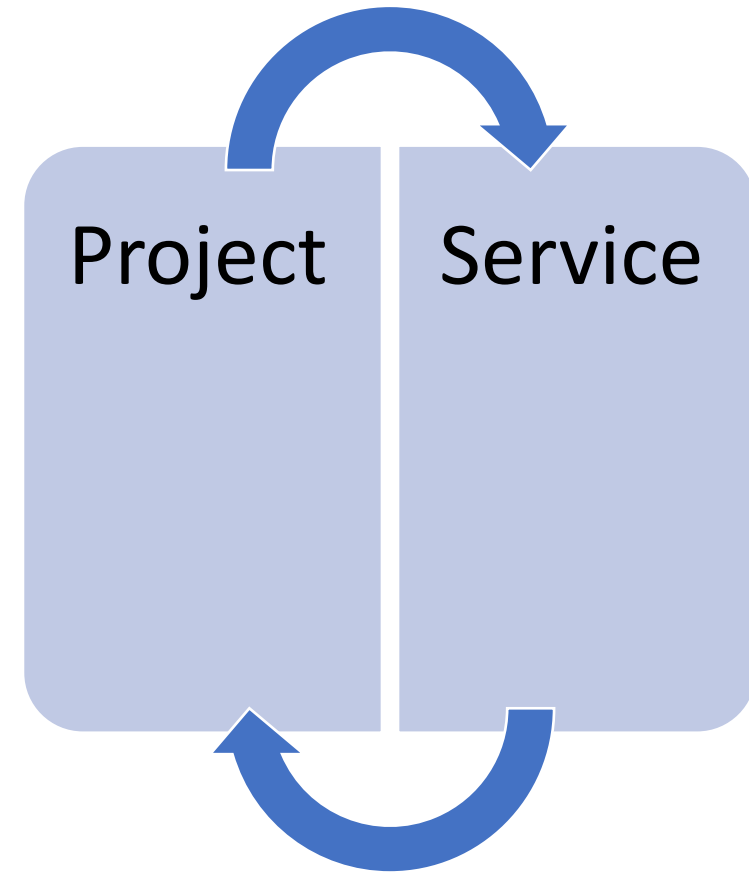
- Design of new or changed service to meet service requirements including at least:
  - a) authorities and responsibilities of the parties involved in the delivery of the new or changed services;
  - b) requirements for changes to resources and their skills;
  - c) new or changed SLAs, contracts and other documented agreements that support the services;
  - d) changes to the SMS including new or changed policies, plans, processes, procedures, measures and knowledge;
  - e) impact on other services;
  - f) updates to the service catalogue(s).

# Service build and transition requirements

- The new or changed services shall be built and tested to verify that they meet the service requirements, conform to the documented design and meet the agreed service acceptance criteria.
- If the service acceptance criteria are not met, the organization and interested parties shall make a decision on necessary actions and deployment. Go or No Go
- Release and deployment management shall be used to deploy approved new or changed services into the live environment.
- Following the completion of the transition activities, the organization shall report to interested parties on the achievements against the intended outcomes set out in the plan. Part of post implementation review?

# Cooperation and collaboration

- Early discussions when a project to deliver a new service is being planned
- Clear non functional requirements associated with the service delivery
- Clear service acceptance criteria for handover to delivery agreed by the PM and built into project plans
- Service representative involved in projects

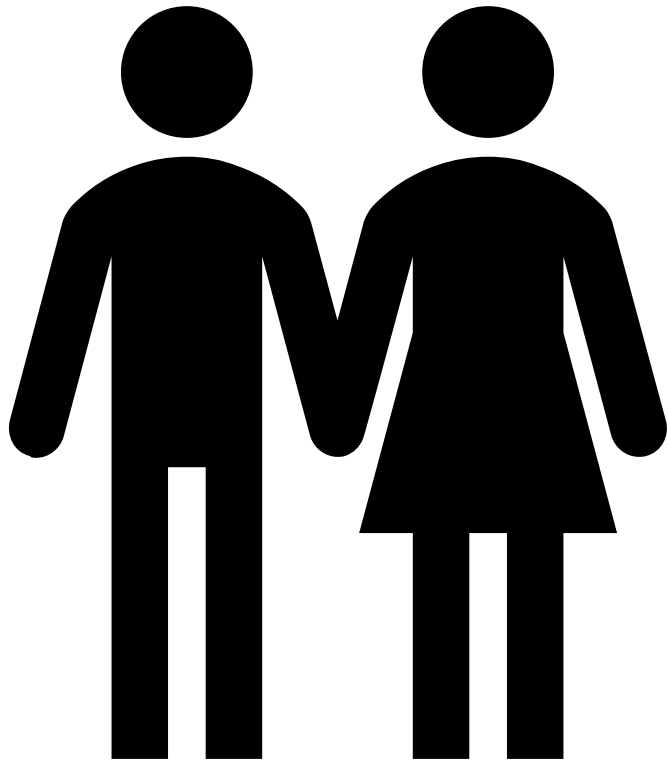






# Project and service managers – Friends or Enemies?

# Mature successful organization



- Learn from each other
- Cooperate
- Collaborate
- Succeed



# Questions?

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