

## Introduction

- **ITIL** - Information Technology Infrastructure Library  
A Framework of 'Best Practice' guidelines  
'Adopt and Adapt'
- **Sources of 'Good Practice'**  
Sources for best practices include public frameworks, standards, and the proprietary knowledge of organisations and individuals

## Service Management as a Practice

- **Process** - Provides change and transformation towards a goal, Process definitions describe actions, dependencies, and sequence. It is Measurable, has Specific results, Customers, and Responds to a specific event
- **Function** - Units of organisations specialised to perform certain types of work and responsible for specific outcomes. Self-contained with capabilities and resources necessary for their performance and outcomes.
- **A Service** - a means of delivering value to customers by facilitating outcomes customers want to achieve without the ownership of specific costs and risks
- **Service Management** - a set of specialised organisational capabilities for providing value to customers in the form of services
- **Utility** is fit for purpose and **Warranty** is fit for use (being assured levels of availability, capacity, security and continuity)
- **RACI model** - Used for documenting the roles and responsibilities of stakeholders in a process or activity. Responsible, Accountable, Consulted and Informed.
- **DIKW** - A way of understanding the relationships between data, information, knowledge and wisdom. DIKW shows how each of these builds on the others
- **Business Value** - Resource and Capabilities - creating business value in the form of Goods and Services
- **Business Case** - Supporting change, e.g.: Cost savings, % improvements

## Automation

- Increased use of 'Self Service' technologies

### Areas that may benefit from automation:

- Design and modelling
- Service catalogue
- Pattern recognition and analysis
- Classification, prioritisation and routing
- Detection and monitoring
- Optimisation

## Service Strategy

- **Service Strategy** provides guidance on how to design, develop, and implement service management not only as an organisational capability but also as a strategic asset.
- **Perception of value**
- **Constraints** include costs and risks attributable to complexity, uncertainty and conflicts in the business environment.
- **Demand Management**  
Patterns of business activity  
Linked to Capacity Management
- **Service Portfolio Management** - The complete set of Services that are managed by the Service Provider. The Service Portfolio is used to manage the entire Lifecycle of all Services, and includes three categories:
  - Service Pipeline** – Services proposed or in Development
  - Service Catalogue** – Live Services or those available for Deployment
  - Retired Services** – Decommissioned / retired Services
- **Risk Management**
  - Risk Analysis
  - Risk Management
- **Internal and External Customers and Services**
- **Financial Management for IT Services** - The Function and Processes responsible for managing an IT Service Provider's Budgeting, Accounting and Charging Requirements.
- **Business Case** - Justification for a significant item of expenditure. It includes information about costs, benefits, options, issues, risks, and possible problems. A financial analysis, for example, is frequently central to a good business case.
- **Business relationship management** - a critical source of information about what customers need, why they need it and how they will use it. BRMs provide links between the service provider and customers at the strategic and tactical levels. BRM look to improve customer satisfaction

## Service Design

- **The main purpose of the Service Design stage** of the lifecycle is the design of new or changed service for introduction into the live environment. Important that a holistic approach to all aspects of design is adopted and that when changing or amending any of the individual elements of design all other aspects are considered.
- **4 Ps of Service Design** (People, Processes, Products and Partners) The areas to be considered in the design of effective Service Management
- **5 major aspects of Service Design**
  - The design of the service solutions, including all of the functional requirements, resources and capabilities needed and agreed
  - The design of Service Management systems and tools, especially the Service Portfolio (including the service catalogue), for the management and control of services through their lifecycle
  - The design of the technology architectures and management architectures and tools required to provide the services
  - The design of the processes needed to design, transition, operate and improve the services. Characteristics are - Measurable, delivers outcome to a customer/stakeholder, responds to a trigger
  - The design of the measurement systems, methods and metrics for the services, the architectures and their constituent components and the process
- **Service Design Package**
- **Key Roles:**
  - Service Level Management**  
SLRs, Negotiating SLAs and OLAs, Service Reviews, Service Improvement Plan, relationship with BRM
  - Service Catalogue Management**  
Managing the Service Catalogue (Customer/Technical views)
  - Capacity Management**  
BCM, SCM, CCM, Application sizing, Modelling, Trending, Demand Management, Tuning, Capacity Plan
  - Availability Management**  
Ensuring that availability meets or exceeds agreed Service levels. Service and Component availability, Reliability, Maintainability and Serviceability. Vital Business Functions. Detection, Diagnosis, Repair, Recovery, Restoration.
  - IT Service Continuity Management (ITSCM)**  
Supporting BCM, Risk Analysis and Management and planning Business Impact Analysis (BIA), Recovery Options
  - Information Security Management (ISM)**  
Setting & monitoring security policy
  - Supplier Management**  
Managing Underpinning Contracts with external suppliers
- **Design Coordination**  
to provide a single point of coordination and control for all activities and processes within the design stage to ensure the goals and objectives of the service design are met

## Service Transition

- The main purpose of Transition is to plan and manage the resources to establish successfully a new or changed service into production within the predicted cost, quality and time estimates
- Service Knowledge Management System SKMS (includes CMS (which also includes CMDB))
- CAB - Change Advisory Board
- ECAB - Evaluating Emergency changes
- Key Roles
  - Change Management
    - 3 types of change model, Std, Normal, Emergency
    - Service Asset and Configuration Management (SACM)
    - Provides a logical model of the infrastructure and its history
  - Release and Deployment Management
    - DML - Definitive Media Library
  - Service Validation and Testing
    - Ensuring a new service and release will deliver a service offering that is fit for purpose and fit for use
  - Knowledge Management
    - to share perspectives, ideas, experience and information
  - Transition Planning and Support
    - to provide overall planning for service transitions and to coordinate the resources that they require

## Service Operation

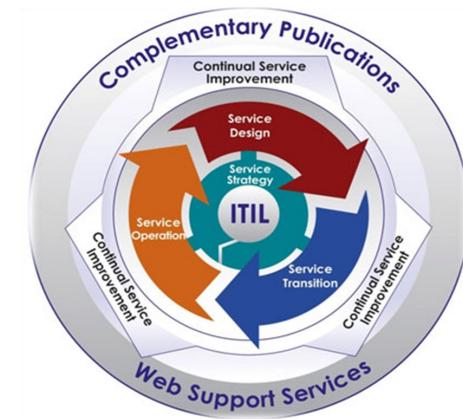
- Value of Service Management seen in Service Operation
- Functions
  - Service Desk: Structures - Local, Centralised, Virtual
    - Supporting the user
  - The Technical Management function
  - The Application Management function
  - The IT Operations Management function (IT Operations Control and Facilities Management)
- Key Roles
  - Incident Management
    - Restoration of Service ASAP
    - Priority - relative importance based on impact and urgency
  - Event Management
    - Overarching process detecting events, determining appropriate action to be taken
  - Request Fulfilment - Handling Service Requests
  - Access Management - Setting and removing access rights
  - Problem Management - KEDB, Proactive / Reactive
    - Root Cause, Reactive & Proactive
  - Process Owner, Process Manager, Process Practitioner and Service Owner

## Continual Service Improvement

- The main purpose of CSI is to continually align and re-align IT services to changing business needs by identifying and implementing improvements. This covers the lifecycle and looks at process effectiveness and cost efficiencies
- The primary concern of CSI is to learn and Improve
- Deming Cycle Plan, Do, Check and Act (PDCA)
- The Continual Service Improvement Approach What is the vision?; Where are we now?; Where do we want to be?; How do we get there?; Did we get there?; Keeping the momentum going
- The 7 step improvement process - Identify the strategy for improvement, Define what you will measure, Gather the data, Process the data, Analyse the data, Present and use the data, Implement improvements
- Business Value, in terms of:
  - Improvements e.g. 20% reduction in failed changes due to improved change process
  - Benefits e.g. Saving of £50,000, due to less failed changes
  - ROI (Return on Investment) e.g. The saving minus the improvement cost
  - VOI (Value on Investment) e.g. Extra value such as improves customer satisfaction or improved speed to market
- Baseline - A point for later comparison
- Types of metrics
  - Technology metrics – Associated with component and application-based metrics such as performance, availability etc.
  - Process metrics – Captured in the form of CSFs, KPIs and activity metrics for the service management processes. These metrics can help determine the overall health of a process.
  - Four key questions that KPIs can help answer are around the:
  - Quality, Performance, Value and Compliance of following the process. CSI would use these metrics as input in identifying improvement opportunities for each process.
  - Service metrics – These metrics are the results of the end-to-end service. Component/Technology metrics are used to compute the service metrics.
- Understand the role of Governance
- Key Roles in CSI
  - Service Manager
  - Continual Service Improvement Manager
- CSI Register

# ITIL Service Management

## Foundation



## Quick Reference Guide

## Presented courtesy of Purple Griffon

This quick reference guide is designed to provide an aid to course delegates prior to taking an ITIL Foundation exam

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