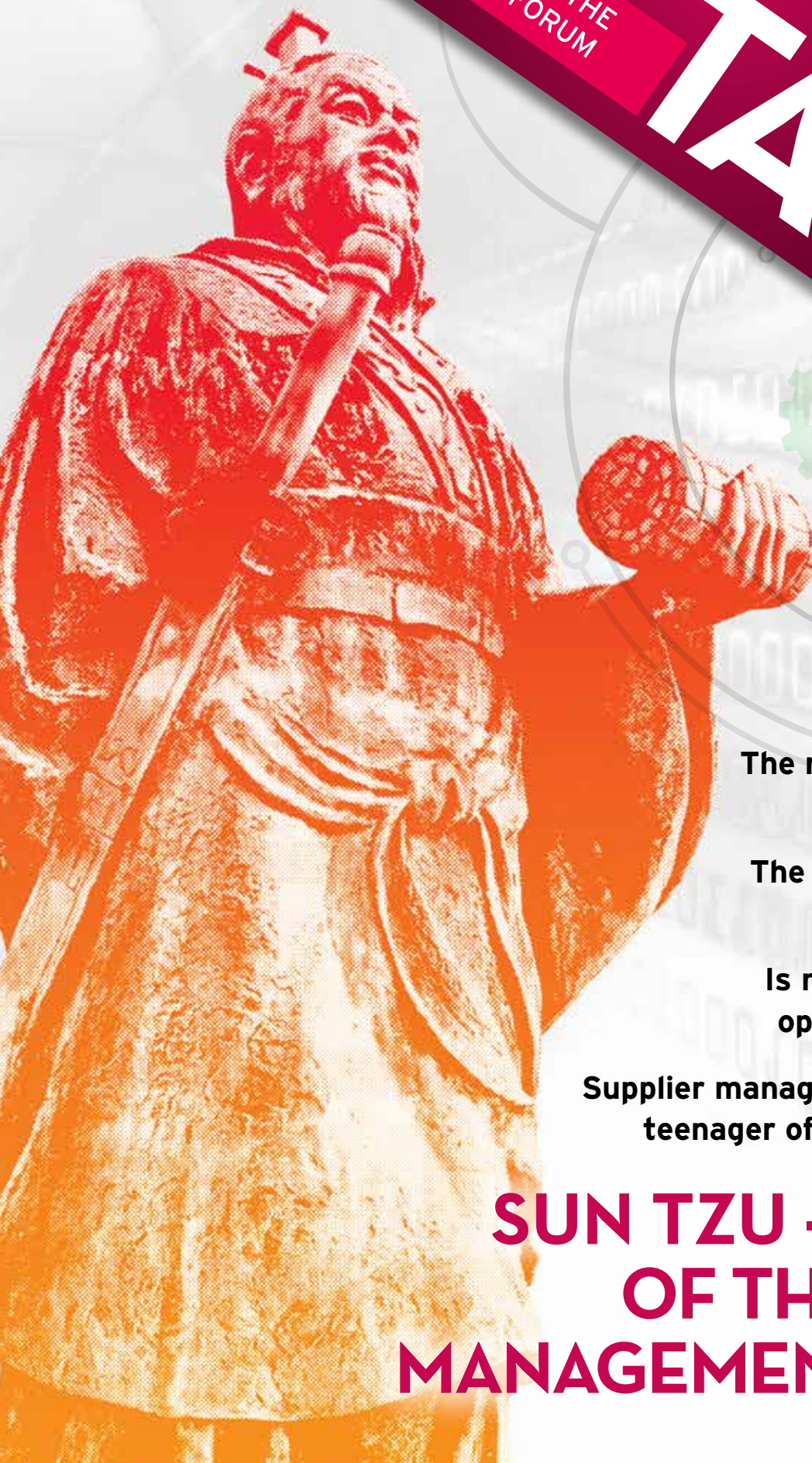


itsmf UK
The IT Service Management Forum
THE JOURNAL OF THE
IT SERVICE MANAGEMENT FORUM

WINTER 2014

Service TALK



The next steps for Global Best Practice 

The 7 building blocks for ITSM Success 

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Supplier management - the difficult teenager of the ITIL processes? 

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THE 7 BUILDING BLOCKS FOR ITSM SUCCESS

For more than 20 years now, organizations have tried hard to adopt the ITIL best practice framework in the hope of improving their ITSM - and for most of them the results fall well below expectations. Submission of the Year winner Patricia Speltincx considers what could be done differently.

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CLOUD, COMPLEXITY AND CONFIGURATION

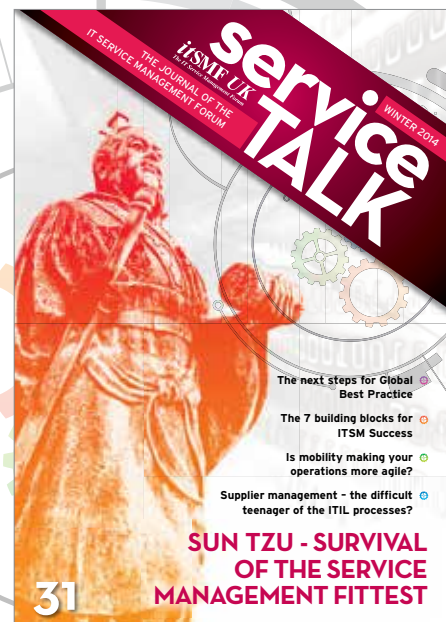
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SUN TZU - SURVIVAL OF THE SERVICE MANAGEMENT FITTEST

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IS MOBILITY MAKING YOUR OPERATIONS MORE AGILE?

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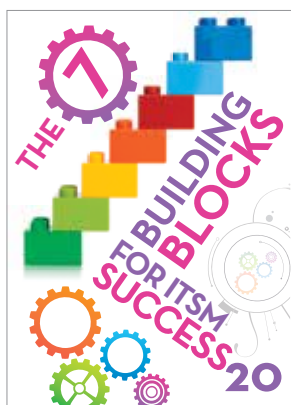
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TIME TO TRY SOMETHING NEW?

I hope you had an excellent Christmas and New Year - though it probably seems a distant memory by now.

The Christmas/New Year holiday period offers a great opportunity to spend time doing something different from the normal routine. For me, this year's 'new experience' was geocaching. If you haven't tried it yet, geocaching is a kind of online treasure hunt that allows you to locate hidden trinkets in the countryside (deposited by other players) with the help of a set of map coordinates provided by a smartphone app. There's something weirdly satisfying about



locating a microscopic container in the middle of a wood, and signing your name on an even smaller piece of paper located inside to show that your detective work has guided you to the right spot. OK, the weather wasn't perfect for such active family pursuits and even the dog began to lose interest after the third treasure trove. But as a new experience and a variation on the usual postprandial stroll, geocaching has a lot to recommend it - particularly for those who refuse to be parted from their phones on Christmas Day!

New experiences are what ITSMF UK is all about - exchanging ideas, innovations and 'war stories' via the physical meetings, online forums, Twitterchats and other channels that members can share. I like to think that ServiceTalk is a key part of this process, keeping readers up to date with the latest developments in the organization and sharing the valuable knowledge of our guest contributors.

In this issue, for example, you can catch up with details of our new Management Board in John Windebank's report to members; find out about the Big4 Agenda which is shaping ITSMF UK's strategy for the year ahead; and learn

about the new Member Referral Rewards Scheme, which offers Masterclass places to those who introduce their friends and acquaintances to the benefits of membership. We even have a new Chief Executive at ITSMF UK, Mike Owen, who introduces himself below.

We hear from Rob Stroud about the need to be agile in dealing with change management; Allan Stear offers a structured approach for finding the right service supplier; and, in the first of a new series of articles, Charles Fraser offers 5 tips for better service level agreements. Barry Corless introduces us to the enlightened management style of Sun Tzu and there's a chance to read Patricia Speltincx's award-winning article on the 7 Building Blocks for ITSM Success.

Whatever your interests, there are some excellent new ideas and perspectives in ServiceTalk to share with your ITSM organization. And if you would like to share your experiences with other members, please do let us know.

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Marketing & Publications Manager

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INTRODUCING MIKE OWEN, OUR NEW CHIEF EXECUTIVE

Hello! I'm delighted to be taking up the role of ITSMF UK's new CEO, and I am very much looking forward to meeting and working with everyone involved with the Forum.

My job will be to build on the successes and skills of our members, partners and staff, and further develop and grow the value, influence and reach of the organization, ensuring it always provides a first-class service to members and stakeholders.

I've actually been involved with member-based organizations and the wider not-for-profit sector for several years now. I've held operational director roles, for example, with Birmingham Chamber of Commerce (Membership Director), the Chartered Institute of Arbitrators (Marketing & Training Director), the Institute of Translation & Interpreting (CEO), and a UK trade association representing the UK consumer healthcare sector (Communications & Commercial Director).

My earlier career includes management roles across both the commercial and public sectors, including Baker Perkins Engineering,



Time Warner, British Telecom, Lloyds Bank, Barclays Bank, Grant Thornton, and the NHS. My roles were predominately in sales, marketing and business development.

In terms of professional background, I'm principally a marketer and general manager/MBA rather than an IT specialist, but I have run (as CEO/MD) two IT-centred member-based companies, both in the health sector. The first was a new 'dot.com' e-commerce enterprise (set up as a joint venture between five pharmaceutical multinationals and their UK trade association) whilst the second was a company that provided software support services for NHS facilities and estate managers.

Over the last few years my professional experience has also included being a part-time partner/consultant in a small strategic advisory firm which I co-founded, together with several non-executive board positions.

My consulting work has included working with both SMEs and mid-sized non-profit bodies. Notably, since late 2012, I have worked with the International Federation of Landscape Architects in the role of strategy/change programme director, assisting a global board to revitalize and restructure their worldwide operations across 90 countries: this recent experience will be very useful, I am sure, within the context of ITSMF UK.

My recent or current non-exec/trustee roles include a variety of charities, member-led and public bodies including the British Safety Council, the Landscape Institute, two housing

associations, a large social care charity and a further education college in the Thames Valley.

I'm particularly pleased to be joining ITSMF UK because of the sheer potential the organization offers in terms of contributing to the overall IT profession - helping to advance and support professional standards and knowhow, people's skills, project outcomes, management processes, and the future development of the sector.

IT management is crucial nowadays to every enterprise and organization. It should go to the heart of business strategy and drive operational processes and competitive advantage, not just focus on technology as is so often the case. There's also, of course, a whole host of wider developments and issues relating to the IT sector, ranging from technical and policy factors like cloud computing, data privacy and cyber security to more management-related issues like securing successful time and cost outcomes for IT projects.

This is a very exciting and fast-moving field to be in. It is for ITSMF UK to step up to this challenge and provide the best support it can. I look forward to working with everyone at ITSMF UK - and with our wider stakeholders - to help make sure that we seize that exciting opportunity together!

Mike Owen
Chief Executive

mike.owen@itsmf.co.uk

SBM OFFSHORE SUCCESSFULLY IMPLEMENTS FRONTRANGE'S HEAT SERVICE MANAGEMENT

FrontRange, the Hybrid IT software company, has announced the successful use of its HEAT Service Management solution by SBM Offshore. By deploying HEAT Service Management in the cloud, SBM Offshore is consolidating critical service desk functions that will now be delivered globally through a single, unified platform.

"SBM Offshore's goal was to provide a global service that is transparent for users no matter where their location," said Carlo van der Stoep, Group IT Director at SBM Offshore. FrontRange's HEAT Service Management in the cloud provides SBM Offshore with a centrally managed, 24/7 global support center. SBM Offshore's didn't want to implement a tool that only provided incident management, but a solution that offers a fully functional service management suite.

As the industry's only hybrid service management platform that supports cloud, on-premise and/or a combination of the two deployment options with a common



framework, FrontRange's HEAT solution integrates IT best practices with voice and workflow automation. This enables service desks in organizations, like SBM Offshore, to easily request a service or change, plan for appropriate remediation measures and automatically approve and authorize requests. In addition, HEAT is designed to implement change requests for users, audit the successful completion and service level agreements associated with the change, and control an organization's service portfolio to ensure enhanced service quality and customer satisfaction.

SWISS RE REPLACES 20 LEGACY APPLICATIONS WITH SERVICENOW ITSM TOOLS



Swiss Re has reduced the cost and complexity of running a large service management operation by replacing 20 legacy applications with a cloud-based ITSM tool from ServiceNow.

The Swiss reinsurance firm, the second largest in the world, has 13,000 IT users across scores of offices in 21 countries, and was the original owner of the Gherkin building in the City of London. Providing support for employees are 2,400 IT staff who deal with approximately 150,000 service desk calls, 290,000 incidents and 380,000 service requests each year.

In order to improve oversight of IT problems occurring across its organization, which runs around 980 business applications, Swiss Re implemented a ServiceNow IT service management (ITSM) tool in 2009, allowing it to replace a number of separate applications.

By introducing the software as a service (SaaS) management system, Swiss Re was able to remove a range of disparate software applications that it had previously relied on and numerous Java applications developed in-house.

These applications have been replaced by a wide variety of ServiceNow modules, including those relating to IT asset, configuration, and content management, as well as data archiving and certification tools. Swiss Re is also planning to introduce an application development management module in future.

CGI MAINTAINS THE ONLY 5-STAR CERTIFICATION IN THE WORLD FROM THE SERVICE DESK INSTITUTE

CGI has been re-accredited for the second year with a 5-star certification by the Service Desk Institute (SDI) for its UK service desk. CGI remains the only organization in the world to have achieved the 5-star standard, recognition of its extremely high levels of client service.

Tessa Troubridge, Managing Director, SDI, said, "The service desk at CGI is truly world class. The strength of the CGI brand and culture, the investment in its people and the empowerment of individuals through being 'members' has been a crucial factor in the service desk maintaining 5-star world class status for the second year running. This is an unprecedented achievement of which the whole team at CGI

should be immensely proud."

The 5-Star accreditation, awarded by the SDI, is described as the ultimate level of quality and delivery for world-class service desks and serves as an aspirational guide for all service management organizations. In 2012 the SDI introduced the 5-star standard to recognise those progressive organizations that are able to deliver the highest possible level of customer service.

To award the 5-star certification the SDI carried out a four day audit incorporating feedback from clients and staff, and worked alongside members to understand how the team provide services to a broad range of organizations. CGI improved on its scores from its previous audit to retain its accreditation.



BCS PARTNERS WITH QA TO DELIVER BEST MANAGEMENT PRACTICE PORTFOLIO

BCS and QA are partnering to deliver PRINCE2® as part of the full Best Management Practice Portfolio (BMP) from AXELOS - the joint venture between the Cabinet Office and Capita plc. The BMP product set comprises ITIL® and the PPM® portfolio of certifications, which includes PRINCE2.

Adam Thilthorpe, Director of Professionalism at BCS, said: "We are delighted to be working so closely with QA in delivering the BMP portfolio of certification including PRINCE2. We pride ourselves on delivering high quality, rigorous certifications that are respected by those working in the industry. We offer a complete learning pathway for IT and project management professionals, enabling career progression and clear validation of their skills."



BCS has an extensive range of professional certifications with over 60 internationally recognised certifications in 11 key subject areas: Service Management, Programme, Portfolio and Project Management, Business Analysis, Solutions Development, Architecture, IS Consultancy, IS Governance and Information Security, Data Centre Management, Agile and Sustainability.

Bill Walker, Commercial Director, QA, says: "The BMP portfolio includes some of the most world-renowned certifications in business today. Having worked with BCS for a number of years in delivering ITIL, offering the full range of certifications through the Institute seemed like an obvious and natural choice for QA. We are really excited about this new partnership with BCS."

SysAid LAUNCHES COMPLETE PATCH MANAGEMENT SOLUTION TO ENHANCE ITSM OFFERING

SysAid Technologies Ltd, a global leader in ITSM software, has announced an agreement with software provider GFI Software to integrate a new patch management solution into its ITIL-certified software. The new feature will be available in both cloud and on-premise editions, offering SysAid customers the most advanced help desk-integrated patch solution on the market.

SysAid's patch management software is designed to fix problems and update computer programs, secure vulnerabilities and improve usability and performance. It provides a clear inventory and full audit control including approvals and dates of installations. This ensures that processes are well documented, performed correctly, and comply with regulations.

"We are proud to announce this agreement with GFI, a leader in security software. It allows us to offer one of the best patch management solutions on the market," said Sarah Lahav, CEO of SysAid. "We now provide the unique capability of audited patch process through change management, providing our customers with a robust solution that meets their daily IT needs."

"Patch management is an important task that many companies fail to do properly or not at all. Our award-winning patch management technology will enable SysAid's customers to automate a very important task for IT admins and help them fix vulnerabilities in their network that could be exploited by cyber criminals," Sergio Galindo, General Manager, Infrastructure Business Unit at GFI, said.



GAMESTOP SELECTS CHERWELL SERVICE MANAGEMENT

The world's largest multi-channel video game retailer, GameStop, has selected Cherwell Service Management for their ITSM solution. Cherwell is replacing a major competitor where the incumbent ITSM product is being retired by the vendor, and will be used for internal support as well as store support.

Headquartered in Grapevine, Texas, GameStop is ranked 273 on the Fortune 500 and retains more than 45,000 employees worldwide. The company operates 6,650 stores in 15 countries as well as online. Always on the cutting edge and committed to delivering great gaming experiences, GameStop offers the most popular games, quality hardware and an extensive collection of game accessories for PCs, next generation gaming consoles and mobile devices—allowing gamers to play anytime, anywhere.

Cherwell President and CEO Vance Brown said, "We are excited to have GameStop join the Cherwell family of customers, and having another global leader choose Cherwell Software further validates that we are building industry leading technology." Flexibility, ease of configuration, and value delivered by Cherwell were the key factors in the decision made by GameStop.



REED & MACKAY STEPS UP IT SUPPORT FOR 300 STAFF USING SUNRISE SOFTWARE

UK-headquartered service management company Sunrise Software has supplied its flagship service desk solution, Sostenuto, to leading corporate travel agent Reed & Mackay. The company has implemented Sostenuto to consolidate systems and introduce a consistent set of processes across the company's dual service desk environment. Since implementing the solution, Reed & Mackay has boosted productivity, enhanced IT user satisfaction and created a measurable framework that demonstrably supports its corporate Quality and Continuous Improvement programme.

To maintain its competitive edge in the fast-moving travel industry where agility is critical, Reed & Mackay turned to Sunrise Software to provide a new, more efficient system to manage its

two independent help desks. The ability to process emails automatically, store information centrally, report on data accurately and integrate closely with other business systems such as Active Directory were key prerequisites for Reed & Mackay.

After carefully evaluating the marketplace, Reed & Mackay selected Sunrise Software primarily for its flexibility and the high level of customization provided by the Sostenuto ITSM solution.

Marilyn Dunk, Head of Reed & Mackay Online commented, "Sostenuto stood out from the crowd in terms of flexibility and configurability. We could tailor the screens ourselves, making it even easier to use, which was vital for encouraging everyone in the IT department to share the same system and adopt new ways of working."

EXPRESS METRIX INTRODUCES FREE SOFTWARE LICENCE COMPLIANCE SOLUTION

Express Metrix, a leading provider of IT and software asset management (SAM) solutions, has released a free, full-featured version of its enterprise-class software compliance solution to help more organizations overcome budget or resource restrictions and achieve audit-ready licence status. Available to organizations with up to 1,000 machines and offering a rich set of features allowing IT professionals to track and manage licence compliance status, the Inventory Edition of Express Software Manager provides enterprise-class functionality combined with exceptional flexibility and ease of use, says the supplier.

ISACA SELECTS ROB STROUD AS ITS 2014-2015 PRESIDENT



ISACA, the international governance organization and owner of the COBIT framework, has selected Robert Stroud as its international president for the 2014-2015 Board of Directors.

Stroud, a regular ServiceTalk columnist, is vice president of strategy and innovation at CA Technologies. Earlier in his career he spent more than 15 years in the finance industry, successfully managing multiple initiatives in both the IT and retail banking sectors related to IT service management and process governance. He joined CA Technologies from the Australian computer security company Cybec, where he was responsible for the company's successful global expansion, including entry into the North American market.



CEO OF AXELOS PRAISES THE GLOBAL BEST PRACTICE COMMUNITY

AXELOS CEO Peter Hepworth has marked the start of 2014 and the full launch of the business by thanking the Global Best Practice community for its valuable input and support over the past six months.

Since AXELOS was formed in July 2013 as a joint venture between the Cabinet Office and Capita, practitioners and Accredited Training Organizations (ATOs) from across the world have helped to shape the development of the business by offering their experience and expertise at forums, workshops, conferences and via social media channels.

This vital input has played a key role in the formation of the ITIL and PPM roadmaps, which outline the priorities and strategy for AXELOS in 2014. As well as setting up the new business infrastructure over the past few months, a number of major milestones have been announced including:

- confirmation of the successful Examination Institutes (EIs) to operate all Global Best Practice exam schemes



- confirmation that the Accredited Consulting Organization (ACO) scheme will continue in 2014
- confirmation that the ITIL Software scheme will continue in 2014



- memorandum of understanding reached between AXELOS and ITSMF International, outlining how the two organizations will work together
- launch of the ITIL Maturity Model and self-assessment service
- launch of the Official ITIL Foundation Exam App.

See the interview with Peter Hepworth on page 24.

MASTERCLASSES

FROM *itsmf* UK
The IT Service Management Forum

SERVICE LEVEL MANAGEMENT

19 February

Service level management is a broad but critical topic for service managers, and is of continual interest and relevance to all IT providers and their customers.

Using a mixture of presentations, 'war stories' provided by delegates, and facilitated discussions, this Masterclass will cover some or all of the following:

- How to get from requirement to solution - i.e. creating SLAs that are fit for purpose
- Considering SLAs from a lifecycle perspective (not just Design) - i.e. similar to test-driven development; look at the end state first and then work out what questions to ask, etc.
- The relevance to and connection with service mapping and service catalogues.

The leader of this Masterclass is John Sansbury, who advises clients on service level management and service management as a consultant, ITIL trainer, author and examiner. He negotiated, documented and established service level agreements for all IT customers when he worked for London Electricity (now EDF).

PROACTIVE PROBLEM MANAGEMENT

4 March

This masterclass introduces a number of activities that will get you started in the most elusive of disciplines. Attendees will have the chance to swap ideas, discuss issues, share solutions and generally get down and dirty with proactive problem management.

Facilitated by Barry Corless of Global Knowledge, former chair of itSMF UK and current vice chair of the Problem Management Special Interest Group, the class will cover:

- Trend analysis
- Major Problem Reviews
- The link with CSI
- Creating problems where there are no incidents, a.k.a "Following up hunches"
- Targeting support action
- Linking with the development environment

MEMORABLE METRICS

27 February

This masterclass, presented by service management consultant Barclay Rae, identifies issues with current IT reporting (particularly operational reporting) and provides practical suggestions on how to improve and develop really useful reports and metrics, targeted at different stakeholders.

The programme offers a mixture of presentations around current thinking on IT metrics and dashboards, with sessions on how to build up 'bundles' of reports (often using existing data) both for internal IT and external customer/user consumption.

This in effect is how to do CSI and the session includes a number of suggested measures and metrics that can be used to improve service quality and also demonstrate the value of IT.

BUILDING A SUCCESSFUL SERVICE CATALOGUE

27 March

This Masterclass, led by distinguished ITIL author and ITSM consultant Colin Rudd, provides a brief explanation and discussion of the theory of the service catalogue and then focuses specifically on the practical aspects of establishing an effective service catalogue. It will include discussions and assignments on:

- The use of a service catalogue
- The blockers and pitfalls
- The enablers
- The structure and design of a service catalogue
- The content and relationship required within a service catalogue.

At the end of the event, delegates should be able to design and implement an effective service catalogue for their organization, recognising the pitfalls to look out for along the way.

Masterclasses are held at the itSMF UK office near Reading, and all classes are limited to 14 delegates. Attendance fee - £395.00 + VAT for members and £795.00 + VAT for non-members.

Book your place through the website at www.itsmf.co.uk or call 0118 918 6500

THE BIG4 AGENDA – GUIDING ITSMF UK THROUGH 2014 AND BEYOND

After an extensive period of consultation with ITSMF UK members through social media, phone meetings and face-to-face discussions, the Management Board have announced the Big4 Agenda topics for the coming year.

ITSMF UK will use the Big4 Agenda to drive the development of services to our members - master classes, seminars, special interest groups, regional events and more. This will provide members with the capability, skills and knowledge they need to gain increased value from their investments during 2014 and beyond. Each year we will review and revise the Big4 Agenda at our annual conference.

The Agenda items are:

Back to basics

- Is your organisation bullet proof?

We have all seen the damaging headlines of how errors in service delivery can bring an organization to a standstill and unable to deliver a service to its customers. Getting the ITSM basics right will ensure that there are reliable, repeatable processes in place that reduce costly errors, enable new products and services to be brought to market smoothly and glitch-free, and ensure that your customers are getting the quality of service that they expect.

Skills

- Developing a capable and creative workforce
- Investing to save

From developing your ITSM professionals of the future, through to developing capability throughout your organization through motivated, well-rounded teams and individuals, this topic is about getting the maximum value from your greatest asset.

Managing complexity

- Using complexity to your best advantage
- Making the innovations work for you

From single source to multi-source there have never been more ways to deliver your IT products and services to an increasingly demanding customer base - no doubt tempted by the 'goodies' on offer elsewhere. So rather than just coping with today's complexities of cloud, multi-sourcing, BYOD and big data, turn them to your best advantage and make your customers delighted.

ITSM and Agile

- Harnessing the power of Agile and ITSM
- Are you ahead of the pack?

The pace of change in the industry is relentless. Customers want an increasing number of new products and services delivered in ever decreasing timeframes. Harnessing and integrating the power of DevOps, Agile and ITSM will enable your organization to deliver new products and services, more quickly and with less risk, in environments of increasing complexity, competition and change.

If you would like to join the discussion around the Agenda topics, make sure you catch our Big4 Twitterchats on Wednesday evenings at 8.00pm. The next two are on 12th February (Agile/ DevOps & ITSM with special guest Stuart Rance) and 12th March (Skills with special guest Matthew Burrows). Just follow hashtag #itsmbig4 and make sure you include the tag in your own tweets.

GOING BACK TO BIG4 BASICS IN PROBLEM MANAGEMENT REPORT

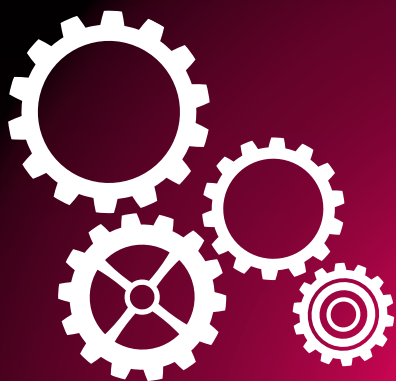
One of the key 'back to basics' issues in the Big4 Agenda is problem management. Getting back to the basics of problem management (or indeed any ITSM process) will ensure that there are reliable, repeatable processes in place that reduce costly errors and enable new products and services to be brought to market smoothly and glitch-free. And as a result, customers get the quality of service that they expect. To support this, during the final quarter of 2013, itSMF UK's Problem Management Special Interest Group (PMSIG) asked member organizations to complete an on-line maturity assessment. The outcome provided a focus for ongoing activity amongst PMSIG members in support of the Big4 Agenda during 2014. The results are available to view in a new report called 'Problem Management - State of the Nation.'

"Admittedly, the participants in the survey had an above-average interest in problem management," said SIG vice-chair Barry Corless, "which is why they were involved in the special interest group, so this may not be representative of the industry at large. But it means that any issues thrown up in the report are likely to be even more acute in the broader membership."

He went on to say, "The research showed 80% of organizations failing to get to level 3 (CCMI - Control) when taking problem management activity as a whole. There are many paths you could take to improve but, based on our results, we found the top 4 to be: Dedicated process ownership, Proactive action, Business focus and Better measurement."

The full report can be found at www.itsmf.co.uk/pmstate





NEW MEMBER REFERRAL REWARDS SCHEME

We are delighted to announce the launch of the new Member Referral Rewards Scheme. ITSMF UK members who refer new organizations to ITSMF UK or increase their own organizational membership will be rewarded with Masterclass places.

Existing ITSMF UK members can get rewards in one of two ways:

1. Refer another organization - the more members you bring, the greater the rewards. This also applies if you have just joined another organization that does not yet have ITSMF UK membership. The scheme applies to brand new members, but also to organizations whose membership lapsed more than 6 months ago - just contact us for details.

2. Upgrade your existing organization - if your organization moves from a single individual to a higher level (Organization/Company 5 or above), you get rewards!

For more information, contact membership@itsmf.co.uk or phone 0118 918 6500.



ITSM14 - CONFERENCE DATES AND CALL FOR SPEAKERS

This year's ITSMF UK Annual Conference and Exhibition will be returning to the Novotel London West in Hammersmith on 10th and 11th November 2014. The refurbished venue offers some exciting new opportunities for networking and learning. Just contact the office for more information or look out for further details!

If you're interested in joining the speaker programme and have an idea for a presentation, you can download the Call for Speakers Guidelines and Form at www.itsmf.co.uk/ITSM14. Please read the guidelines carefully before completing the form and remember to let us have your application by the deadline of 28 February 2014.

CONTRIBUTOR OF THE YEAR AWARD RENAMED IN MEMORY OF ASHLEY



The Management Board have decided to rename one of our most coveted awards in memory of a truly dedicated volunteer. The Contributor of the Year Award will in

future bear the name of Ashley Hanna, who died at the end of last year following a long illness. Ashley was a Management Board member, ITIL author and reviewer, ISO/IEC 20000 examiner, and most of all an inspiration and mentor to numerous ITSMF UK volunteers over many years (see the Chairman's Report on page 12).

Ashley's Big Challenge, a fund established to raise money for

Macmillan Cancer Support, collected more than £6000 last year thanks to the generosity of our members and friends, placing it in the top 1% of Justgiving accounts. Our intrepid ABC team will be taking part in Reading Half Marathon again on 2nd March. If you would like to support them, please visit www.justgiving.com/ashleysbigchallenge.

NEW MEMBERS

A warm welcome to the following, who joined us in the fourth quarter of 2013.

ORG/COMPANY 25

- **Ministry of Defence**
Cliff Wallis

ORG/COMPANY 10

- **Thunderhead.com**
Asif Farooqi

ORG/COMPANY 5

- **Allstate NI**
John Jenkins
- **Cambridge University Press**
Marion Nightingale
- **City and Islington College**
Mark Jenkins
- **iXglobal**
Anne Veen
- **Virtrium**
Edward Dennehy

INDIVIDUAL

- **Holistic Service Management International**
Tony Brough
- **1st CM**
Richard Page
- **Archimago**
Simon Miller
- **Associated British Foods**
Adrian Sheward
- **De Beers UK**
Patrick Baxter
- **eu-LISA**
Donka Raytcheva/Patrick Wallaert
- **Fen View Limited**
Matthew Fursedonne
- **Hitachi Consulting**
Jonathan Wright
- **IFDS**
Arturo Cowling/Matt Corbett
- **IG Service Consulting**
Iain Gosling
- **JP Morgan Chase Bank**
Ian Horrabin

- **Leigh Academies Trust**
Josephine Hastings
- **MDB Consulting and Training**
Mike Baker
- **New Habits**
Liz Moor
- **Orange Business Services**
Olivier Jarrar
- **Procter and Gamble**
Gail Andrew
- **Southampton Solent University**
Daniel Cooper
- **SunGard Availability Services (UK)**
Anna Moran
- **Swisslog UK**
Linda Woodford

STUDENT

- **Thomas Stephens**
Thomas Stephens
- **University of Leicester**
Jonathan Morley

2013

2014

TIME
FOR
CHANGE



ITSMF UK CHAIRMAN JOHN WINDEBANK REFLECTS ON AN EVENTFUL 2013 AND OUTLINES HIS HOPES AND PLANS FOR THE COMING YEAR.

2013 was a significant point in time for the IT Service Management community.

Throughout 2013, approaches to managing IT services evolved to address the continued growth of cloud computing as a mainstream component of IT service solutions. We also saw a significant shift

in social media from personal to business use; and the continued mass adoption of tablet devices and the resulting 'bring your own technology' impact in our workplaces. All of this occurred within the context of continued extreme pressure on IT budgets and ever-increasing business demands for greater agility and rapid change.

The creation of the AXELOS joint venture between the Cabinet Office and Capita plc to run the Best Management Practice portfolio, including ITIL, also prompted a great deal of comment within our industry in 2013. Our member organizations in the training and academic sectors have been the first to see some of the initial effects of this change, and we expect the planned outcomes of the AXELOS roadmap for ITIL to become directly relevant to the majority of our members over the 2014-2015 period. We saw one of ITSMF's core strengths demonstrated as the chapters collaborated with our International Executive Body (IEB) to reach an agreement with AXELOS which was announced in November. This Memorandum of Understanding sets out a framework for cooperation between the two organizations globally, including collaboration in the development of new products and the recognition of ITSMF as a key stakeholder in the future of ITIL and Global Best Practice (see the interview with AXELOS CEO Peter Hepworth later in this issue).

Many factors sparked debate within the ITSM community in 2013. 2014 needs to be a time for action, not just deliberation. The economy is at last showing some healthy signs of recovery, which is resulting in predictions of global IT spending growth

of over 5% in 2014. Businesses will place extreme demands on their internal and external IT service providers as they strive for growth, and those involved in the management of IT services will need to evolve their organizations' ITSM capabilities rapidly to meet these demands.

To address our members' need for change, we announced the ITSMF UK Big4 Agenda for 2104. These areas for action - Back to Basics, Skills, Managing Complexity and ITSM & Agile - were identified through an extensive period of consultation with ITSMF UK members through social media, phone meetings and face-to-face discussions, and underpin all of our activity for the year ahead.

We have also established a new Management Board with a structure - approved at an Extraordinary General Meeting - that is geared to drive change, and the new and existing Board members are now settling into these pivotal roles. At the same time, our Chief Executive Ben Clacy has moved on from ITSMF UK, and I would like to record our sincere thanks to Ben for his dedication and commitment over many years. Since joining ITSMF UK in 2006 Ben progressed quickly through the organization, having responsibility for business development, sales, marketing, events and membership before becoming Chief Executive in December 2010. Ben has very clearly made a significant contribution to the evolution of ITSMF UK over what has been a very challenging period, and although he will certainly be missed by us all, we wish him every success in his new role as Director of Operations and Development at the Foundation Trust Network.

Management Board Leavers:

- Colin Rudd
- Don Page
- John Sowerby

Management Board Joiners:

- Claire Agutter
- Peter Saul

Changing Roles:

- John Windebank
(Vice Chair > Chair)
- Rosemary Gurney
(Member Engagement > Vice Chair)
- Jane Suter
(> Sales & Marketing)

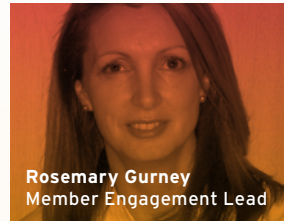
I would also like to say a personal thank you to Colin Rudd, Don Page and John Sowerby, who have completed their two-year terms as Chairman, Sales & Marketing Lead and Service Development Lead respectively. Each of these individuals has made a significant contribution and their presence on the Management Board will certainly be missed. Colin Rudd has been successfully elected onto ITSMF International's IEB and I'm sure will make a major impact in that role.

I am also delighted to announce that we have appointed Mike Owen as our new Chief Executive. Mike is an MBA and brings with him extensive experience and expertise in senior management roles across commercial, public and charity sectors, working with large organizations as diverse as Baker Perkins, Time Warner, British Telecom, Lloyds Bank, Barclays Bank, Grant Thornton and the NHS - as well as a number of SMEs. He also brings with him considerable knowledge of the membership/not-for-profit sector, having worked as CEO/MD for three member-based organizations and in various operational & trustee director roles (including both trade and professional membership associations such as the international Chartered Institute of Arbitrators). He is currently completing a role as strategy/change programme director with the International Federation of Landscape Architects, and will be formally starting with us on 5th February.

2013 Management Board



Don Page
Sales & Marketing Lead



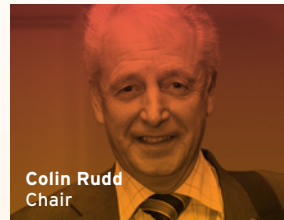
Rosemary Gurney
Member Engagement Lead



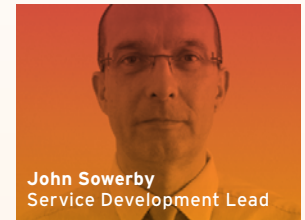
Vernon Lloyd
Governance and Ethics
Director



John Windebank
Vice Chair



Colin Rudd
Chair



John Sowerby
Service Development Lead



David Jones
Service Delivery Lead



Jane Suter

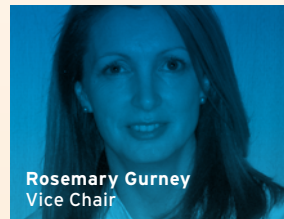


Alan Thomson
Finance Director

2014 Management Board



Jane Suter
Sales & Marketing Lead



Rosemary Gurney
Vice Chair



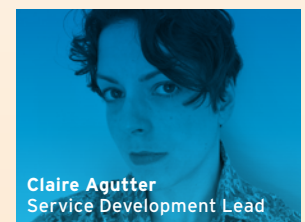
Vernon Lloyd
Governance and Ethics
Director



Peter Saul
Member Engagement Lead



John Windebank
Chair



Claire Agutter
Service Development Lead



David Jones
Service Delivery Lead



TBA
Commercial
Management Lead



Alan Thomson
Finance Director



Ashley Hanna

As many people will know, Ashley Hanna passed away at the end of 2013 after a lengthy illness. Ashley was a great inspiration and true friend to many people within the global ITSMF community.

He served ITSMF UK in many roles, including Chair of the Publications ESC on the Management Board, was a prolific author, highly regarded editor and senior examiner. He was awarded the ITSMF UK Paul Rappaport Award for Outstanding Contribution to IT Service Management in 2010. Ashley will be sadly missed by us all.

During 2013 ITSMF UK has supported Ashley's chosen charity, Macmillan

Cancer Support through fund-raising initiatives under the banner of Ashley's Big Challenge. From sponsorship of ITSMF UK members taking part in the Reading Half-Marathon to donations at our Awards Dinner charity raffle, the running total raised so far is over £6,000. Further donations can be made at: www.justgiving.com/ashleysbigchallenge

**SERVICETALK
INTERVIEWS JANE
SUTER, RECENTLY
APPOINTED TO
THE NEW ROLE
OF MARKETING &
SALES LEAD ON
THE ITSMF UK
MANAGEMENT
BOARD.**



Jane, how did you come to join ITSMF UK and what qualities and experience do you bring to your new role?

I originally joined as part of a new organization membership and went along to an ITSMF UK regional event in Portsmouth. I was fairly new to IT at the time and had never even heard of the ITSMF UK but had just been appointed to manage the Marketing and Communications for our ISO/IEC 20000 accreditation project.

The event far exceeded my expectations both in terms of content and networking opportunities - all of which played a key part in building my confidence for the role and the ultimate success of the project. So I've been a fan of the ITSMF UK ever since!

Since then, I became the first Chair of the (then) newly formed London and South East region before joining the Board.

Marketing, communications and sales are things that I really enjoy doing and, in the past, I have developed marketing campaigns that resulted in coverage in the national press.

What are your priorities for the next six months?

My key priorities are to grow our membership, to make sure that we get our messages right using the appropriate communications channels, and to attract new sponsors and partners to the ITSMF UK.

**SPOTLIGHT
ON JANE
SUTER**

Times are tough for membership organizations generally. How would you say we can best demonstrate value to potential members?

Our strength has always been the opportunity we provide for quality networking and the sharing of ideas and experiences. Moving forward, the Big4 Agenda gives us a unique chance to focus our products and services on the key issues that affect our members' organizations and their customers in 2014. I'm thrilled with the enthusiasm that the Big4 Agenda has generated both in this country and also abroad.

I never forget that the success of the ITSMF UK is very much dependent on the fantastic support that we get from our volunteer members, the office team plus all of our sponsors. As a volunteer myself, I find 'volunteering' fulfilling and would highly recommend it to our members - plus we now have the Elite Volunteer scheme that will reward you for your efforts.

You recently introduced Twitterchats to the member events programme to discuss the Big4 Agenda - how successful has this been? Is social media the way forward for service managers to exchange ideas and experience, would you say?

Although the ITSMF UK has been using social media, I don't think we have really fully exploited its potential yet. The Australian Chapter, through Kathryn Howard and Brad Busch, have been brilliant in helping us with our social media strategy and getting the Twitterchats off the ground - particularly as I am still a relative social media newbie myself!

The #itsmbig4 Twitterchats have been our first social media 'events' and I was delighted with all of the Big4 Agenda thoughts, comments and ideas that came

forward. They really played a part in our choice of the Big4 topics. The Twitterchat focus will now turn to each of our agenda items before, in October, we ask you to help us select the Big4 for 2015. So if you are free on Wednesdays, at 20:00 GMT on the middle Wednesday of the month, then do join us (hashtag #itsmbig4).

I certainly think that social media should be one of the ways that service managers and professionals share ideas and experiences, but I am aware that many of our members do not use social media to any great extent. So I want to make sure that we keep all of our communications and networking channels open, so that our members can contribute in the ways that they are most comfortable with.

What other ideas are you trialling to boost ITSMF UK membership?

We have just launched our Member Referral Rewards scheme which allows members to bag prestigious Masterclass places for successfully referring new member organizations. The scheme applies if a member refers another organization or if they themselves upgrade from an individual membership to the organization level. We're conscious that our members move between organizations, so this scheme is also an incentive to get their new employer signed up and getting the benefits that membership of the ITSMF UK brings.

If you were granted one wish for improving service management, what would it be?

I think that many of the issues are caused by communications, in particular in listening to what customers, colleagues and stakeholders are saying. So my big wish is for everyone to pause, blot out their own thoughts and then really listen effectively (and I include myself in this!)

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SATISFACTION
to see us —
SUCCEED.

Chris Stavrinides, IT Customer Services Manager,
Oxford University Press

MONITOR

itsmf UK
The IT Service Management Forum

ITSM SELF-ASSESSMENT AND BENCHMARKING ONLINE

ITSMF UK have introduced a low-cost self-assessment offering for members, covering a wide range of factors that contribute to best practice Service Management.

Achieving excellence is not just about having mature ITSM processes, although this is a significant factor. If we are to be successful we must align with business goals and deliver best value to our organizations. MONITOR aims to measure these elements, allowing members to identify strengths and weaknesses and areas for improvement. MONITOR will also provide you with a body of evidence to support decision making and underline IT business value.



For more information, visit www.itsmf-monitor.co.uk

14

SITS

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BIRMINGHAM WELCOMES

ITSM



ITSM13, ITSMF UK's 22nd Annual Conference and Exhibition, has been dubbed "an outstanding success and a fantastic experience" by outgoing chairman Colin Rudd. Held for the first time at the International Convention Centre in Birmingham, the event saw an increase in delegate numbers over last year and once again provided the most comprehensive programme of service management presentations and networking opportunities available anywhere.

This year's packed programme included keynotes from ex-fighter pilot Jo Salter, management guru Eddie Obeng, AXELOS CEO Peter Hepworth, and Library of Birmingham Director Brian Gambles. The agenda featured presentations from

the Co-operative Banking Group, Virgin Media, Everything Everywhere, Jaguar Land Rover, UK Government and many more organizations, who took up itSMF UK's invitation to share their experiences and successes.

The awards evening this year was hosted by novelist, TV celebrity and former Cabinet Minister Edwina Currie, who presented nine awards to the leading lights of our industry. This year's Paul Rappaport Award for Lifetime Achievement in ITSM went to Stuart Rance, while QBE, the Met Office and EE scooped the member awards for Project, Team and Innovation of the Year respectively. See the full list of winners and finalists overleaf.

There was also a 'drop-in clinic' for those

with service management issues to resolve, and a lively interactive plenary session chaired by itSMF UK's incoming chairman John Windebank.

The conference also provided a great chance for networking, with round tables to discuss the future of service management and the Global Best Practice portfolio, ITSM and education, and ITSMF UK's own Big4 Agenda (discussed in more detail in the Chairman's Report).

A big thank you to the sponsors, exhibitors, volunteers and staff who made the conference possible.

This year the Annual Conference returns to London. For more information about the Call for Speakers, see the ITSMF UK News section.



ITSM 13 AND THE WINNER IS...



SERVICE MANAGEMENT PROJECT OF THE YEAR

Sponsored by **Marval Software**

Presented to the organization that, in the judges' view, has completed the most successful and challenging IT Service Management project during the year.

WINNER: QBE

FINALISTS: EE, Land and Property Services



SERVICE MANAGEMENT TEAM OF THE YEAR

Sponsored by **Axios Systems**

Presented to the members of a team that, in the judges' view, have supported each other and their customers in providing inspirational service delivery and significant business benefit.

WINNER: The Met Office

FINALISTS: CGI, EE



SERVICE INNOVATION OF THE YEAR

Sponsored by **Peoplecert**

Presented to the organization offering the most novel product or service offering that has been developed over the past year.

WINNER: EE

FINALISTS: BSMimpact, HP



TRAINER OF THE YEAR

Sponsored by **Fox IT**

Presented to the individual who, in the judges' view, has been the most successful and consistent IT Service Management trainer during the year.



WINNER: Jim Davies, Smatra

FINALISTS: Andrew Jacobs, QA; Adam Poppleton; Brightoak Consultancy



CONTRIBUTOR OF THE YEAR

Sponsored by OpenText

Presented to an individual who, in the judges' view, has made an outstanding contribution to the itSMF UK organization as a volunteer in the last year.

WINNER: Alison Cartlidge, Steria

FINALISTS: Helen Sussex, John Groom, Sandra Whittleston, Stuart Wright, Kevin Holland, Martin Neville, Jane Humphries, Tricia Lewin, Michael Hall, Paul Offord, David Backham, Paul Gillen, Steve Straker, Tony Brough, Paul Laird, Stephen Morgan, Tony Oxley, Barclay Rae, Damien Moore, Dave White, Jason Deverell, John Moore



OUTSTANDING CONTRIBUTION TO ITSM (PAUL RAPPAPORT AWARD)

Presented to an individual who, in the judges' view, has made a sustained and outstanding contribution over a number of years to the field of IT service management. It is the itSMF UK's ultimate recognition for IT service management professionals.

WINNER: Stuart Rance, Optimal Service Management



SUBMISSION OF THE YEAR

Sponsored by IT Training Zone

Presented to the author of the article or white paper that provides the most informative, educational, and thought-provoking ITSM content.

WINNER: The Seven Building Blocks of ITSM Success by Patricia Speltin, SM2

FINALISTS: ITIL Process Management Framework by Ian MacDonald, the Co-operative Group • A Definition of Proactive Problem Management by Paul Offord, Advance7 and Steve White, Kepner-Tregoe • Do you need Problem Management? by Michael Hall, Deutsche Bank



STUDENT OF THE YEAR: ITIL

Sponsored by APMG International

Presented to the ITIL student who has achieved ITIL Expert through the current ITIL qualification scheme between 1 August 2012 and 1 August 2013 with the highest average score across all Intermediate and MALC modules.

WINNER: Melvin Kenyon

FINALISTS: Adam Lampon, Kostas Tsatsaris



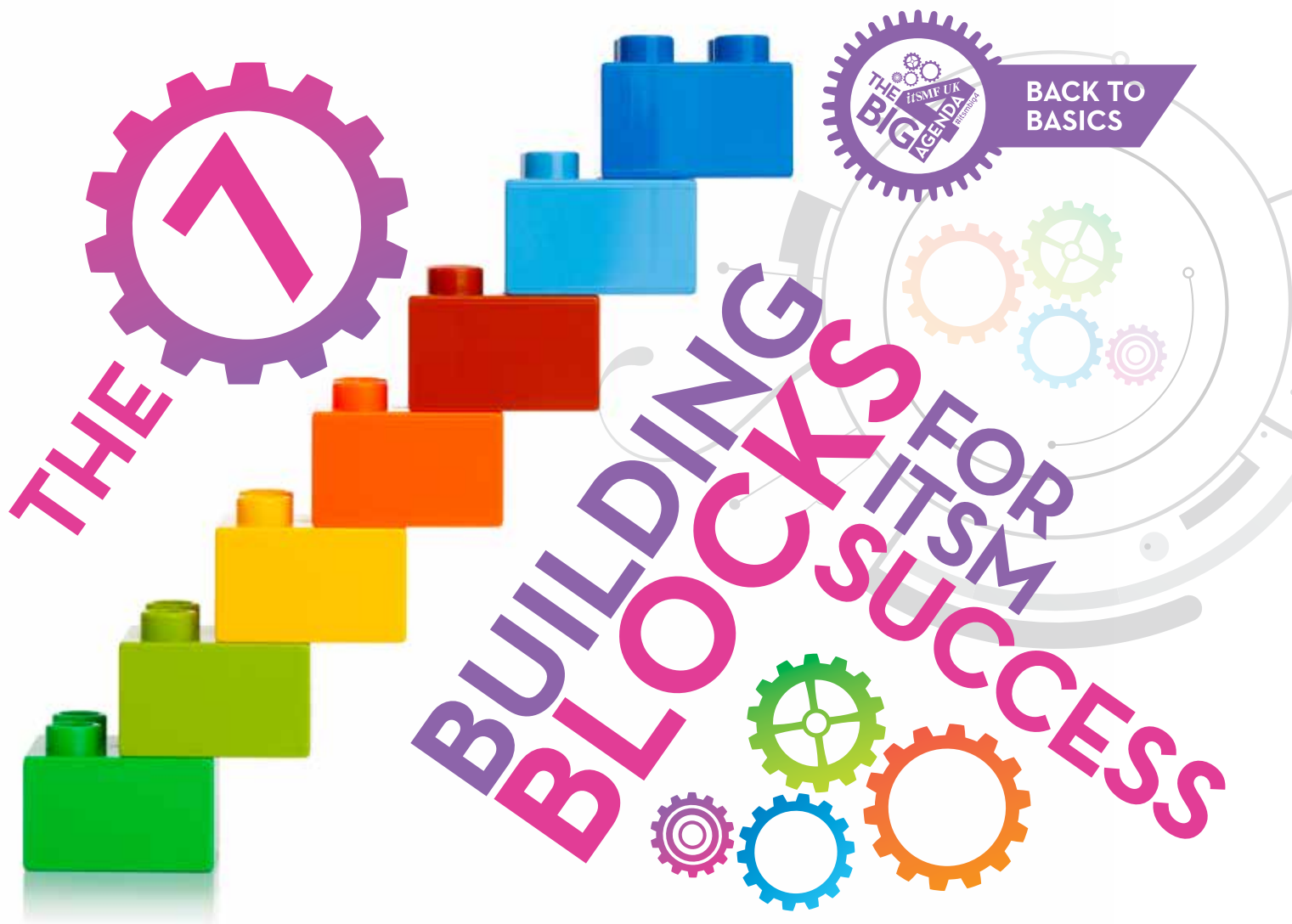
STUDENT OF THE YEAR: ISO/IEC 20000

Sponsored by APMG International

Presented to the individual who has achieved the highest marks in the ISO/IEC 20000 Consultants examination during the year.

WINNER: Sandra Heydorn
(award collected by Markus Bause)

FINALISTS: Samuel Shepherd, Bernd Papachrisanthou



FOR MORE THAN 20 YEARS NOW, ORGANIZATIONS HAVE TRIED HARD TO ADOPT THE ITIL BEST PRACTICE FRAMEWORK IN THE HOPE OF IMPROVING THEIR IT SERVICE MANAGEMENT (ITSM). LET'S FACE IT: FOR MOST OF THEM, THE RESULTS FALL WELL BELOW EXPECTATIONS. EINSTEIN DEFINED INSANITY AS "DOING THE SAME THING OVER AND OVER AGAIN AND EXPECTING DIFFERENT RESULTS". WISE MAN! IS IT NOT TIME TO STOP DOING MORE OF THE SAME THING AND TO CONSIDER A CHANGE? PATRICIA SPELTINCX CONSIDERS WHAT COULD BE DONE DIFFERENTLY.

A service organization, like any other organization, wants to achieve success; but this requires several key elements to work together. I love the metaphor of building blocks in this context because it offers a good illustration of the way that organizational success is gradually constructed. Success does not just happen, you have to build it.

So the question is, what blocks are needed to build success in ITSM? Naturally, most people would turn to the ITIL framework and ITIL provides part of the answer by describing one of these building blocks, the processes, in detail. Some other blocks are just mentioned but not developed in ITIL and others are simply outside its scope.

From my own experience, I have found it really interesting to go beyond ITIL, to think 'outside the box', simply because the question of developing organizational success is not specific to service

management. It is a common management concern. Therefore, general management and organizational theories apply and can help us see problems encountered in our service management world from a wider perspective.

My objective in this article is to identify and discuss the seven blocks that are needed to build sustainable success in ITSM; and to do this by adopting a wider perspective, combining ITIL with general management and organizational theories.

THE TWO OBVIOUS BLOCKS

Let's start with the two obvious ITSM building blocks: technology and processes.

Technology is trivial: you could not provide IT services without technology and tools being involved. That's as far as it goes for this one!

Processes are widely acknowledged and accepted as a key building block for ITSM success. Processes are recognised as the foundation of the ITIL best practice framework and of the ISO/IEC 20000 standard. I will not spend more time discussing this block because everybody tends to agree that processes are necessary. However, if they are necessary, are they sufficient? I don't think so. I take as proof the fact that, after more than 20 years of ITIL adoption, organizations still struggle to derive actual benefits from processes. ITIL looks so simple at first glance, suggesting that all you need to do to reap benefits from processes is to learn best practices and do the same in your organization. The reality is not that simple.

The service management community should stop dreaming that processes on their own, implemented as a cut and paste from best practices, will resolve all their problems. Processes are key

the 7 building blocks for ITSM success

but believing that they are sufficient on their own is nonsense. Processes are just a management tool, nothing less and nothing more.

Imagine you dream of setting up a great restaurant and the only assets you have are an excellent cookbook full of recipes, the best kitchen appliances, and experts in kitchen appliances. Do you think you will be successful? Of course not.

It is the same for IT services. You don't build good IT services just with documented processes, IT technology and IT experts. They are necessary but not sufficient.

So other blocks have to be considered.

THE FIVE ADDITIONAL BLOCKS

I have called the following blocks 'key blocks' because, in my opinion, they are enablers for processes and tools. I will go as far as to say that, if these five blocks have not reached a certain level of maturity, processes CANNOT bring benefits and could even be counter-productive.

How did I come up with these five blocks? By integrating my own service management experience with management and organizational theories. In this context, I think of authors such as P.M. Senge (The Fifth Discipline), J.K. Liker (The Toyota Way), W. Schutz (The Human Element), J. Collins (Good to Great), R. M. Grant (Contemporary Strategy Analysis), and W.E. Deming (Out of the Crisis).

Let's take a look at these additional building blocks in detail.

1. People

Here we are thinking of people as individuals and teams, and I include staff and managers. For service organizations, people are a key asset. Their level of motivation and engagement has a massive influence on the quality of services delivered to the customers and therefore on the profitability of the organization.

All current management theories agree on the importance of developing people for the success of the organization. Here is an interesting extract from the ITIL Lifecycle Suite (Service Strategy - Appendix B - B.5 p382)

"The value of people assets is the capacity for creativity, analysis, perception, learning, judgment, leadership, communication, coordination, empathy and trust. Such capacity is in teams and individuals within the organization, due to knowledge, experience and skills... They are the most versatile and potent of all asset types because of their ability to learn and adapt,... people assets are the only type that can create, combine and consume all other asset types. Their tolerance of ambiguity and

uncertainty also compensates for the limitations of processes, applications and infrastructure..."

People have a massive potential and it is key to the success of service organizations to develop and tap into the potential of their people.

Key skills that really make a difference and that should be developed are as follows:

Personal mastery

This is about self-control, self-leadership, autonomy, ability to focus our energy, ability to have the right attitudes, to act according to our values. Personal mastery is key to personal efficiency. Personal efficiency is key to the organization's efficiency.

Ability to challenge mental models

This is about realising that we are subjective beings and that we see the world as we are and not as the world actually is. It is about accepting that there can be several truths and valid viewpoints other than ours. It is about challenging our mental models and progressively changing our perception of the world to get closer and closer to reality. This open-mindedness is key to efficiency.

Will Schutz argued that it is not the difference between people that was the real cause of team inefficiencies but mental and behavioural rigidities.

Ability to work and learn in teams

Imagine the energy that is wasted today in tensions and conflicts. Organizations would greatly benefit from developing people's ability to work and learn together in a really cooperative way. It is well-known that the potential of a cohesive team is far greater than the sum of the individuals' potential.

Problem solving

I don't talk here about technical problem management but about the general ability of an organization to resolve problems that are preventing it from creating value and achieving its objectives.

I observe that, when facing a problem, people tend to focus their energy on defending themselves and their viewpoints, proving they are right, proving it is someone else's responsibility or fault, finding excuses for what went wrong... All these behaviours have in common that the energy is actually taken away from the problem resolution.

Efficient problem solving is about considering that each of us is responsible (not guilty) for the problem and able to contribute ('able to respond') to its resolution. It is about looking at it as a common problem and focusing all our energy on its resolution.

I wanted to mention 'problem solving' explicitly to highlight its importance to the success of the organization, but this capability will naturally emerge by developing the first three skills mentioned above.

Note that the first three skills correspond to three of the five disciplines that P. Senge argues are needed to develop a learning organization.

All these skills are acquired through personal development. The business world tends not to like this idea of personal development but this is really what is needed. Personal development leads to personal efficiency, which in turn leads to the organization's efficiency, which is exactly what is wanted.

Before going to the next key building block, let's remember what René Descartes said about common sense: "Nothing is more fairly distributed than common sense: no one thinks he needs more of it than he already has."

It is the same here. Most people see when others don't have these skills but think that they themselves possess them. This can be one of the reasons why organizations invest so little in personal development.

2. Management

The next key building block of successful service organizations is management capability, i.e. the way the business manages its assets, and in particular people, in order to achieve its objectives. This capability is in the sole hands of managers and executives.

Here is what ITIL says about it (Service Strategy - Appendix B - B.1 p381): "Management is a system that includes leadership, administration, policies, performance measures and incentives. This layer cultivates, coordinates and controls all other asset types. Management includes idiosyncratic elements such as philosophy, core beliefs, values, decision-making style and perceptions of risk. It is also the most distinctive and inimitable type of asset deeply rooted in the organization..."

The key message here is that management plays a critical role as a lever for all the assets of the company, and in particular for the other key building blocks of ITSM (people, organization, culture and ITSM strategy). You can have the best people but, without good management, you do not use their potential to good effect and you don't keep them.

Of all the blocks needed to build a successful organization, management can be considered as the cornerstone.

The critical importance of the management capability is often totally underestimated although experience shows that one main cause of failure in implementing ITSM is indeed inadequate

the 7 building blocks for ITSM success

management. Unfortunately, management often consists simply of managing targets and performance, which is a minute part of what it should be doing.

From the managerial point of view, introducing formal ITSM processes is not as trivial as it seems because the organization moves from a pure hierarchy to a matrix or even a multi-dimensional structure. Instead of having one clear management line, i.e. hierarchical, a new transversal managerial dimension is added for process and/or service management. This represents a massive change both for staff and for managers. To be successful with this change, a high-level and mature management capability is required.

Although it is important, it would take too long to develop here all the issues encountered when moving to a matrix service organization, but I want to emphasize the fact that the classical 'command and control' hierarchical management style no longer works in this context. Something different is needed.

It is essential that managers understand that developing successful ITSM involves more than just imposing new work processes on staff. A critical success factor for the introduction of processes is a change in the managerial mindset.

There is a need to develop a management philosophy that is adapted to the use of processes. This is what I like to call 'management BY processes', to distinguish it from management OF processes. The key principles of management by processes are:

Learning organization

The current business world is complex and in constant change. The time has passed when a few individuals could acquire and hold all knowledge needed for the company to be successful. To survive, an organization nowadays must be able to continuously learn in order to adapt to unavoidable changes and to competition.

Systems thinking

Systems thinking is the fifth discipline of P. Senge (I don't give them in order! Remember, I had already mentioned three: personal mastery, mental models, team learning. You will have to read further to find out the missing one). For P. Senge, systems thinking is the cornerstone of the learning organization. In short, it is about seeing the big picture when analysing a situation or resolving a problem.

A service organization is a complex system made of interconnected elements and is itself part of a complex environment. It is essential to see it and to think of it in that way.

According to this systemic view, all the building blocks I am talking about in this article must be considered and developed in an integrated way. It does not make sense to consider processes and

technology in isolation, as is often the case in ITSM projects.

Continuous improvement

The concept of improvement is coupled with the learning organization. The whole point of learning is to then act in order to maintain and improve efficiency, cost-effectiveness and distinctiveness. This is part of the quality culture and it must be more than just buzzwords. It has to be part of the managerial culture.

Empowerment of staff

Empowerment of staff is promoted by most modern management theorists. Although it is often used too lightly as a fashionable concept with little understanding of its real depth, empowerment of staff makes full sense in this complex world. The service industry needs people who are autonomous and who are committed to the quality of the services they deliver to customers. People need to be given the power to get there.

Cooperation

Quality services depend on cooperation between people from different teams. This is the essence of the matrix organization.

Although most managers agree on this fact, the prevailing management practices actually promote internal competition rather than cooperation. There is often a fundamental contradiction between management based on objectives and targets and the wish for better cooperation between teams.

Cooperation cannot just be wishful thinking. The roots for it are in a well thought out and sincerely lived management philosophy.

Nowadays, most managers are so busy managing their targets that they don't take the time to think about management philosophy - developing a vision, principles, and core values.

Too often, management is more about figures and budgets than people and organizations; it is more about managing results than the actual system generating the results. To be fair, all the above concepts are talked about and used as buzzwords but they are rarely acted upon. As a consequence, a lot of energy is spent in tensions between managers and staff with poor services and poor efficiency as the end result.

3. Organization

Success will also depend on the ability to move from a pure hierarchical organization to a matrix. Efficient end-to-end processes and services indeed require a high level of coordination and cooperation between various technical teams but also between the hierarchical managers and the new transversal managers (e.g. service and process managers). This will not happen unless

it is facilitated by a clear organizational structure.

New roles and responsibilities

Introducing service and process dimensions requires new roles to be defined and enforced, e.g. service owner, process owner, service level manager.

Too often, service management best practices are developed within the scope of projects (temporary by nature) which, when they end, leave a responsibility void because the key roles have not been created in the permanent structure.

Another common situation is that processes are designed according to best practices but nobody receives enough authority to enforce them, e.g. the release manager cannot stop an application going live although there is a red light from testing; process managers or owners are external consultants with limited authority...

To achieve success, serious attention must be given to define and enforce the needed roles and responsibilities.

Rules and systems

An organizational framework must be defined according to the way that services and processes will be managed, e.g. how will resources be allocated, how will priorities be set, how will priority conflicts be settled, how will decisions be made, how will stakeholders coordinate activities.

Guiding bodies

ITIL mentions a few guiding bodies such as the IT Steering Group, the Service Management Office, and the Change Advisory Board. These are just a few examples and experience shows that others might be needed.

For the service organization to be successful, it is key to set up the coordinating groups in a way that allows them to perform their roles effectively, making decisions, allocating resources, setting priorities, arbitrating conflicts, etc.

4. Culture

You will have understood by now that moving from an IT organization to a successful IT service organization involves a massive cultural shift. Without the appropriate culture, all the efforts invested in introducing ITSM best practices are in vain! So the ability to adopt an appropriate culture is a key building block to success. This is widely acknowledged as the biggest challenge and a major cause of failure in ITSM projects. So let's have a closer look at this building block.

Everyone accepts that the culture of IT staff must evolve from a technology focus to a service focus and from a best efforts to a process-based approach. Although this deserves attention and effort, I think

the 7 building blocks for ITSM success

that this is the easy part of the cultural change. What managers tend not to see is that the biggest cultural change is not for IT staff but for themselves.

Developing successful ITSM represents a change in working practice for staff but it represents a far bigger change for managers who have to adopt a different management style, adapted to the use of processes. This is where the real difficulty resides and, unfortunately, in most cases it is not even acknowledged so, a fortiori, it cannot be overcome.

As I have already mentioned above, a manager's challenge is to develop a learning organization, to adopt systems thinking, to set up continuous improvement, to empower staff and to promote cooperation. What a challenge!

This cultural building block is a difficult one to put in place because, first of all, it has to be acknowledged as a challenge for and by managers; and secondly, it takes time and patience and it cannot be tackled directly. It is only achieved as an indirect result of the development of the other building blocks.

5. ITSM strategy

Last but by no means least, I want to discuss the need for an ITSM strategy to be defined at the highest level of the organization.

I need to clarify that, when I talk here about ITSM strategy, I do not mean strategy for services as described in the ITIL Service Strategy publication. I mean the need to define a strategy for developing service management.

Let's recap on the key capabilities that we have identified as being necessary for a service organization to be successful:

- developing people's potential and buy-in
- adopting a management approach that is adapted to the use of processes
- adapting the organizational structure to cope with the new managerial approach
- instilling a service and cooperation culture both at staff and management level.

These capabilities go beyond pure ITSM and affect the whole organization.

In addition, we have established that the cornerstone of our structure is the adoption of a different management approach. There is very little chance that this can be tackled just at the IT level or within the scope of a traditional ITSM project. There is very little chance it can happen without reflection, self-questioning, commitment and genuine engagement at the strategic level of the company, simply because this is where most control and influence are exerted. For real efficiency, the energy impulse must come from the top.

This is why an ITSM strategy should be

defined as part of the wider corporate strategy to guarantee alignment and coherence.

The ITSM strategy should cover high-level guiding principles and planning for:

- the definition of the main ITSM building blocks we have talked about so far, i.e. people, management, organization, culture, processes
- the way to develop them, including proper change management to facilitate the cultural and organizational change.

The advantage of such a strategic exercise is that it drives the key stakeholders to a shared vision for ITSM. And here it is, the fifth and final discipline of P. Senge to which we alluded earlier.

Let me open a parenthesis.

The five disciplines of the learning organization (systems thinking, personal mastery, challenging mental models, shared vision and team learning) are the five capabilities an organization must possess to be successful. This theory developed by P. Senge in *The Fifth Discipline* is a great source of inspiration for any service organization, any team and any individual who wants to learn and progress.

Let's close the parenthesis and go back to the shared vision.

In P. Senge's own words: "When there is genuine vision (as opposed to the all-too-familiar 'vision statement'), people excel and learn, not because they are told to, but because they want to... The practice of shared vision involves the skills of unearthing shared 'pictures of the future' that foster genuine commitment and enrolment rather than compliance. In mastering this discipline, leaders learn the counter-productiveness of trying to dictate a vision, no matter how heartfelt".

CONCLUSION

Congratulations on getting this far! Thanks for your interest and here is the conclusion. These are the key take-aways from this article:

1. ITSM is more than implementing processes according to best practice ITSM is a capability and more specifically a managerial capability that can be developed through the complex assembly of resources and capabilities (building blocks).
2. Besides processes and technology, other key blocks are needed to build a successful service organization. By adopting a systemic approach, I identified five additional key blocks: people, management, organization, culture and strategy. Naturally, these are not applicable only to service organizations but to any organizations.
3. Management is the lever for the other building blocks.

4. There is a benefit to thinking 'outside the box' and embracing general management and organizational theories.

At the end of the day, a service organization is still an organization and needs good management.

By identifying the key capabilities service organizations need to develop in order to be successful, I have described an ideal vision. I am aware that my message can sound somewhat theoretical.

However, "There is nothing so practical as a good theory", as Kurt Lewin said. An ideal vision is indeed like a star guiding you on your journey, especially when the journey is long like this one. It gives you a clear idea of where to go and allows you to "Begin with the end in mind" (Stephen R. Covey). Therefore I hope that, no matter how far from your current reality my message may sound, it can help you to take some steps in the right direction.

If you are not a manager in your organization, you may feel that all this is not within your sphere of influence. But whatever your position in your organization, there is something you can do at your level to contribute to the improvement of at least one of the key building blocks.

Here are two final quotations to consider.

"If you want to live a long life, focus on making contributions." Hans Selye

"Make the best use of what is in your power, and take the rest as it happens." Epictetus



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THE NEXT STEPS FOR GLOBAL BEST PRACTICE

AS THE NEW JOINT VENTURE BETWEEN CAPITA AND THE UK GOVERNMENT TAKES ON RESPONSIBILITY FOR ITIL AND PRINCE2, AXELOS CHIEF EXECUTIVE PETER HEPWORTH TALKS TO SERVICETALK ABOUT THE INSIGHTS HE HAS GAINED FROM SIX MONTHS SPENT ENGAGING WITH SERVICE AND PROJECT MANAGERS AROUND THE WORLD.

ST ServiceTalk

Peter Hepworth, we last spoke in the summer, shortly after you joined AXELOS as CEO. Now, as the new company takes control of the Global Best Practice portfolio, how would you describe the challenges and events of the last six months?

PH Peter Hepworth

I'm very pleased with the way things are progressing. Since the summer we've been busy putting together the AXELOS team, many of whom have transferred to us from the Cabinet Office. As of the beginning of January when we formally take over responsibility for the portfolio,

we have just under 40 people in place. We will subsequently be resourcing up to 50 people around the end of Q1, to deliver on everything we've promised to deliver.

In addition, we've been working on the tender process for the examination institutes. That was concluded in September, and the results were communicated to the ATOs. So there are now nine global exam institutes who have a right to market and promote all of our portfolio of products. This marks a big change from the past, when only APMG had rights over PRINCE2 and PPM. There has been a lot of interest among the EIs and ATOs in expanding into the broader portfolio, so training companies focusing on PPM will be able to move into ITIL and vice versa. This has been very well received; it involved a lot of work, of course, as we had to ensure that the whole ecosystem of exam institutes, the accredited training organizations and consulting organizations had all the right access to the right training and examination materials, and that they received the right support where necessary.

the next steps for global best practice

So as well as setting up a new UK-based company, we have been very focused on business as usual and ensuring the continuity of the guidance and qualifications. The books aren't changing, neither are the exams, and the exam credentials are all still valid, which is key for organizations that are putting staff through Foundation and Intermediate courses. But at the same time we are working on the things that will change by taking part in product workshops within the best practice community. As well as attending the ITSMF UK conference in November, I've been travelling around the world, visiting ITSMF USA and Japan, attending chapter and government meetings in Australia, and latterly taking part in ITSMF events in Germany and Estonia. I've given keynote presentations and run workshops to validate the ITIL and PPM roadmaps we published back in November, and I've taken part in discussions on social media and online. So it's been a very busy time all round.

ST

Do you find big differences in the issues that are raised and the topics of discussion as you travel around the world?

PH

There are differences, certainly, which is why it's important to travel widely and hear everyone's perspective. This is one of the things, I believe, that AXELOS can achieve more effectively than the Cabinet Office, which was restricted in the amount of travel it could do. What's good to see though is that the main priorities are the same wherever I go. When I present the ITIL and PPM roadmaps in Germany, USA or Australia, our ideas around value proposition, relevancy and career pathing are well received by the local communities. Translations and localization of material often come up in discussions, of course; but language is not always the main differentiator. In Australia, for example, most businesses are SMEs so there is less interest in case studies about huge enterprises that might be relevant to other audiences, and more take-up of publications such as ITIL Lite which are specifically geared to smaller businesses. So we are constantly aware of the need to tailor materials to accommodate local needs, but I would say that our high-level objectives receive validation worldwide.

ST

We're hearing a lot about new approaches to service management, particularly Agile and DevOps (in fact, ITSM and Agile is one of the Big4 Agenda items), and some commentators suggest these approaches are actually threatening the future of ITIL. To what extent are they shaping your plans for the BMP portfolio?

PH

Yes, we're finding a lot of interest in Agile and DevOps in some (but not all) markets. I attended DevOps days in New York in

October, and at the Estonian conference I heard a great presentation on DevOps by the chair of the chapter, Kaimar Karu. What's very encouraging for me - and different from what you might read in some social media - is that the DevOps enthusiasts I meet speak passionately about the need to put a core ITIL-based structure in place to support DevOps and get it working successfully, otherwise it's the Wild West in terms of processes. Some of the things you read online suggest it's all about DevOps now, but I don't believe that's how the community is implementing it.

It's essential for us to publish information about complementary frameworks and how ITIL will work with other approaches to service management. This is very much a part of the roadmap. In many ways these new approaches are keeping ITIL relevant and bringing it forward; we need to engage with all schools of thought, and we're encouraged by the free exchange of new ideas.

ST

What about the academic community? How are discussions going with the universities and business schools?

PH

We had meetings with academic representatives at the UK conference and also in the USA and Australia. These were a very productive first step. In late January, we also have a series of workshops with UK universities and business schools - their interest is in ensuring that their offerings are relevant to the workplace, and they have seen considerable success in using ITIL and PPM to help them develop marketable qualifications with academic underpinnings. We are very keen to assist them in moving these initiatives forward.

ST

The Memorandum of Understanding between AXELOS and ITSMF is an exciting announcement for our community. How do you see this relationship developing?

PH

Yes, discussions around the MOU began back in June, and we've done a lot of work with Colin Rudd, Bartosz Gorczynski and other members of the international community to progress this. ITSMF has a thriving community with chapters around the world, and it's great to close off the year with an action plan and a strong ongoing relationship. I look forward to building on this agreement in the months ahead and working with the ITSMF community to help guide our thinking.

ST

Last time we spoke, you said you would be in 'listening' mode for some time running up to the beginning of 2014. How far have the things you've heard during this time surprised or challenged you?

PH

I would say our discussions have been very positive overall - not without their challenges, of course, but the Best Practice community has a constructive approach, and what we tend to hear are proposed solutions rather than negative criticism. This positivity has helped us to formulate and validate our roadmap. We haven't finished by any means, and there are many discussions within the global community that we are still keen to have.

Having said that, we've moved on from passively listening. We've also started to deliver, and a little earlier than we expected. We've launched our first app in response to consumer research, we have a new ITIL maturity model, we have changed and confirmed the operating model for EIs, and we've addressed the way we work with training, consultancy and product vendors.

As we move forward through 2014 we'll keep evolving the roadmap and keep collaborating with the community (within the context of agreements like the one with the ITSMF). I think we're set up for success and look forward to hearing the ideas coming in.

ST

Thank you very much, Peter.



Peter Hepworth is CEO of AXELOS, the owner of the Global Best Practice portfolio.

CHOOSING THE MOST SUITABLE SUPPLIER OF A PRODUCT OR SERVICE CAN BE AN EXPENSIVE LOTTERY DURING THE CONTRACT LIFETIME AND AT REVIEW/RENEWAL TIME. THIS IS NO DIFFERENT WHEN CONSIDERING IT SUPPLIERS, EXCEPT THAT THEY AREN'T ALWAYS AS EASILY COMPARED, OR THE DIFFERENTIATORS IDENTIFIED. IF ONLY THERE WAS SOME SORT OF STRUCTURED APPROACH. ALLAN STEAR LOOKS AT SOME OF THE BASICS OF SUPPLIER MANAGEMENT, BUT ALSO PROVIDES SOME POINTERS WHICH MAY PROVE USEFUL WHEN CONSIDERING EXISTING AND FUTURE SUPPLIERS.

More and more of our services are reliant on suppliers fulfilling their contractual obligations. But how do we ensure we're getting value for money, the right service levels, reviewing contracts when we need to and have accurate information for renegotiation? The answer, amongst other things, is supplier management.

"The goal of the supplier management process is to manage suppliers and the services they supply to provide seamless quality of IT service to the business, ensuring value for money is obtained."



MANAGING COMPLEXITY

SUPPLIER MANAGEMENT THE DIFFICULT TEENAGER OF THE ITIL PROCESSES?

This description (more or less) is presented to students at all ITIL foundation courses and in many cases that is their first and last awareness of this process. However if adopted and maintained, supplier management can provide long-term benefits for your organization.

Supplier management is a process that, once set up, will facilitate the monitoring and control of your current suppliers in addition to being a formal process for engaging new supplier organizations. Guidelines should be set up and adhered to for contractor negotiations so that the process is as transparent as possible.

Why do we need a process? What are the key benefits?

We know that all teenagers love guidance, rules and simple steps to follow. OK, maybe not, but adopting a formal supplier management approach at all stages of the service lifecycle will provide on-going benefits to your organization, including:

- Ensuring your supporting, external services are aligned and underpin your business services, goals and targets
- Maintaining clear ownership and awareness of supplier and contractual issues
- Protecting your business from poor supplier performance
- Safeguarding availability of service
- Using suppliers in the right places for your organization and getting value for money

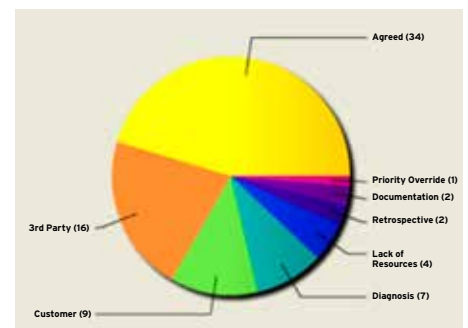
But what are the likely challenges?

Some of the typical challenges encountered can include:

- **Moving targets and continually changing business and IT needs.** This is often out of the hands of IT, but expected to be reacted upon, designed in and overcome. Sweeping business changes may result in having to adopt suppliers on the say-so of finance/legal/purchasing department criteria (without always undertaking a lifecycle costs assessment).
- **Supplier management and the cloud.** There are potential issues here in organizations without strict supplier/contract management. Although cloud

services have been around for some time, few have actually gone through a full business cycle. Very close attention should therefore be applied to the known contentious areas including:

- Data ownership - who owns what, on what terms?
- Where are support boundaries?
- What is the charging basis, if any, for exceptions?
- How do suppliers (and sub-contractors) adhere to organizational security controls?
- **Unrealistic or inappropriate targets.** If it's not in the contract, it won't happen (or you'll be paying for it!). Organizational changes can render existing targets impossible to achieve. Worse still, they may involve tie-in for long periods without the chance to change them.
- **Identifying performance breaches.** Only clear, consistent Service Level Agreements (SLAs), backed up with Underpinning Contracts (UCs), combined with good service management processes will provide the focus for supplier performance breaches or dips. One simple way to flag these up is to capture where SLAs are breaching due to the supplier (third-party) contribution. Simple SLA breach keywords enable quick reporting and review:



- **Knowledge drain.** This works both ways. We often see examples where suppliers position themselves as knowledge custodians. The organization then relies more and more on externally managed IP, which is a difficult situation to turn around without a clear strategy. It's often also the case that certain individuals from supplier organizations are A-team standard; but what happens when

supplier management – the difficult teenager of the ITIL processes?

they go missing? We don't want to be lining up alongside the B-team. What is their approach to knowledge and skills management?

- **Training approach.** What about the supplier's attitude to training? Understanding technology is one thing, but how about your organizational policies/processes and procedures? To put it another way, the technical service might be spot on, but the quality and satisfaction may be dire!
- **The blurring of boundaries** - especially in the operational support side of things - can be a tricky area to manage. This can result in staff not having a clear understanding of where responsibilities and interfaces stop and start. The whole point of using suppliers is to get value for money and quality service, where agreed.

Supplier management types and relationships

To successfully select the most appropriate type of supplier relationship and management, there needs to be a clear understanding of the business objectives that are to be achieved. This should be driven by a combination of the supplier type, value/importance and the risk/impact on services and the business.

In most organizations it helps to group these types into one or more categories. These often include strategic, tactical, operational and commodity suppliers. Characteristics of these types include:

Strategic

- Significant, often long-term or unique partnerships
- Sharing confidential strategic information
- Senior management engagement

Tactical

- Significant commercial activity
- Regular contract and performance reviews
- Middle management engagement

Operational

- Operational products and services
- Junior/operational management engagement

Commodity

- Relatively low value products and services - easy enough to chop and change if needed
- Junior/operational management engagement

The amount of effort dedicated to managing the supplier relationships is therefore in proportion to what they contribute to the business.

The process

All suppliers of one sort or another should be in scope of one or more processes. Clearly some suppliers will contribute more to the bottom line than others, but this is where applying a scalable process fits in.

Considerations for a supplier management process

The Supplier Management Process (SMP) itself relates to one or more supplier and contract database(s), with clearly defined categories, roles, responsibilities, metrics and interfaces. This is where the adoption of international standards (such as ISO/IEC 20000) can help, in order to benchmark your suppliers on a level playing field (it also demonstrates commitment of the supplier to adopting quality standards). Key elements of the process should include:

- **Clear scope.** Guidance on what is/isn't covered. This is often better achieved using legal advice.
- **Roles, responsibilities and activities.** Clear guidance on who is expected to do what, to what level, how, where and when. Special attention needs to be given to involvement in changes, end-to-end SLAs, and the updating of records (including configuration items). One of the key responsibilities is communication across all levels of the organization, so defined communication plans must be agreed and followed.
- **Metrics, performance and monitoring.** These need to align with their category and business impact. Once again these must form part of the selection process, as once in place modifications may prove difficult. Clear, aligned underpinning contracts should support relevant Key Performance Indicators (KPIs). A common mistake is to rely purely on the supplier to provide this information. On rare occasions this can lead to higher charges being levied than the service levels being delivered actually merit.
- **'Regular' reviews.** Good supplier relationships involve planned, regular reviews and flexibility for reviews based on exceptions. The term 'regular' clearly needs to reflect a sensible level and interval.

Performance, KPIs and service quality, exceptions and expected changes are all important areas to include in supplier reviews. These are to review a number of additional aspects including: overall supplier suitability, cost, feedback, service improvement activities raised/implemented, and the planned joint roadmap. Clearly this can then lead to renegotiation and/or termination (and let's not forget further expansion).

The reviews need not be onerous but simple task activities with checklists as controls (all the better if they can be

referenced in your ITSM tool). Create a schedule and document the outcomes by category in the records (for simple audit evidence), then the reporting side of things becomes easy.

- **Service improvements.** These can be outputs from anywhere in the service lifecycle.
- **Evaluation/selection of suppliers.** Selection decisions should be based on business needs, not fancy trivial features and functions. Other factors involved are risk/impact and overall costs.
- **Supplier exit.** Exiting or terminating a contract should be designed in from the start and clearly documented in the process/policy; once again, it needs to be supported by legal guidance.

Cutting through the sales hype

So there we are, we've carried out our due diligence, checked the capability, quality, published performance metrics, but what else should we be considering as softer criteria?

Important considerations when sourcing suppliers can and should include whether or not they:

- Can prove a track record of partnership
- Contribute to the wider industry - awards, events etc.
- Have an active service improvement culture
- Can demonstrate value-add, as well as contractual adherence
- Are prepared to be benchmarked against international standards

The happy medium - let's not forget that the ideal relationship with suppliers should be win-win

So we should really be viewing that difficult teenager as a valuable family member, who is just as important in the grand scheme of things as everyone else; moreover, one who can make or break the family harmony and always has the ability to embarrass us in front of guests!



Allan Stear is an ITSM Consultant at Marval Group

5 TIPS FOR BETTER SERVICE LEVEL AGREEMENTS



BACK TO BASICS

THE THINGS THE BOOKS DON'T TELL YOU

CHARLES FRASER OFFERS HIS TOP TIPS FOR KEEPING YOUR SLAS ON TRACK

Service level agreements - what a waste of time they are!

Now don't get me wrong - I am a great believer in the value of SLAs. They are the cornerstone upon which effective IT Service Management is based, and they are central to building and maintaining a positive relationship between the user community and IT.

You really cannot understate the benefits of good SLAs, but...

It's just that... well... I rarely see good service level agreements. Almost without exception they tend to be documents written by IT, from an IT perspective, that are generally just about what IT thinks it should (or should not) do.

As a result most SLAs are largely unused and unloved. They sit on a shelf gathering dust, only seeing the light of day when somebody in IT needs to check the definition of Availability just to make sure that the last e-mail outage does not count as a period of unexpected unavailability!

Because of this, it would be fair to state that the great majority of SLAs are at best a waste of time and effort, and at worst they can actually lead to a deterioration in the relationship between the user community and IT.

This article provides you with 5 simple and practical tips to help make sure that your SLAs are worthwhile and that they do add value. These tips are not intended to provide an exhaustive and definitive list of all the things you need to consider when putting SLAs in place. Instead they are intended to provide you with some key nuggets of practical advice that are not found in any of the standard ITIL books. They come from my experience of helping multiple organizations to set up and maintain truly effective service level agreements.

There is no getting away from the fact that some of my tips contradict the advice provided by ITIL. This is not meant as a criticism of ITIL. Rather it is simply an honest reflection of where I have found that the advice given by ITIL does not work effectively in a real world situation.

Tip 1. Keep each service level agreement 'short and sharp'

How short? Two sides of A4 - maximum. Alright, you can have an additional title page, but the core contents of the SLA should be limited to two sides of A4.

To keep to this length you need to remove all of the 'padding', all the sections that really add nothing to the SLA - and your SLA will be all the better for this!

Don't be tempted to include sections on things like as batch turnaround times, service continuity arrangements, change management procedures, service hours, details of how to contact the Service Desk, security, printing, etc. None of these are actually needed in an SLA - so don't include them.

Instead only include the sections that are really needed, that are going to be of some value and that actually add something the SLA itself. My suggested list of contents for a typical SLA would be:

- **Introduction** - containing a brief description of the service and who the customer is
- **Duration of agreement** - start and end date of the SLA (the maximum duration should be 12 months - see Tip 4)
- **Service quality criteria and targets** - how will service quality be measured, and what level of service does IT commit to provide?
- **Service performance reports and reviews** - when will the service reports be produced (and what will they contain) and when will service reviews be held?
- **Signatures** - customer and IT representatives signing the SLA

And that's all! Anything else is just unnecessary padding, waffle.

Now, no cheating! No appendices, and most definitely no Glossary of Terms. If you write an SLA that requires a glossary you have written a bad SLA. Start again and remove all ambiguous and technical terms, all acronyms etc. And don't be tempted to use a really small font, that's also cheating!

Oh, and of course all the usual stuff. Write as simply and as clearly as possible. Do not use pseudo-legal or technical terms. It is also essential that the service quality criteria and any service performance targets are easy to understand and are written from the user and not the IT perspective. But you know all this.

Tip 2. Drop the caveats (stop making excuses!)

Most SLAs are full of caveats.

Do any of these seem familiar? They are all examples taken from real 'live' SLAs that I have come across:

- The availability targets for all Tier 1 applications will not apply in the case of a serious network issue
- The resolution time for incidents will not apply if the underlying cause of that incident is found to be a 'bug'
- These service targets will only apply during normal working conditions ('normal working conditions' were not defined in the SLA)
- E-mail will be deemed to be available should the e-mail server not be unavailable. Please note: it may not be technically possible to send or receive emails when the e-mail service is available
- The service performance targets as stated in this SLA will not apply in exceptional conditions. Exceptional conditions are those which IT deems to be outside acceptable limits of technical stability (does anyone actually know what this means?)

Get rid of caveats like these! They undermine the purpose, integrity and value of any SLA. Now I am not saying that there are never truly exceptional conditions - there clearly are. But there is no need to list these in the SLA (especially when they are often defined using some form of pseudo-legal jargon).

The problem is that these caveats make it look as if IT is trying to avoid being held responsible for meeting its commitments. They tend to focus attention on what IT cannot or will not do. They accentuate the negative. This tends to undermine the whole point of having an SLA (which is essentially to demonstrate the positive).

Tip 3. Do not use availability to measure service quality

It is an unfortunate truth that most SLAs are still written from the IT perspective.

This is about more than the language used (although technical terminology and abbreviations are still very common). It is also about the fact that, almost without exception, the service quality criteria and service performance targets found in SLAs are defined from the IT perspective.

5 tips for better service level agreements

Availability is the perfect example of this. By far the most common service quality criterion found in an SLA is 'availability'. And the most common service performance target would be 'all the nines' e.g. 99.xx%.

The problem is that nobody actually understands availability - what it really means. Yes, it is defined in the SLA (usually very badly and from a technical (system) perspective!), and yes somebody in IT can tell you how many minutes' unplanned downtime is acceptable with an availability level of 99.89%. But to the typical IT user availability means nothing. It is therefore a completely meaningless measure of service quality. But this is not all - it gets worse.

Availability-based service targets are actually a source of potential conflict between IT and the users. This arises because the way availability is measured rarely reflects the user experience (and expectation) of what availability actually is.

So IT provides figures to prove that the availability targets are being met (all the graphs are green - back slapping all round), but the user perception is very different. The users cannot put any kind of figure on it, but their perception is that there seems to be a lot of time when they cannot use the service as they had expected to.

So IT is confused. The availability targets are being met, but the users think service quality is poor. The users are confused. To them the service quality is poor, but IT is insisting this cannot be the case because the targets for availability are being achieved. IT thinks the users are being unreasonable and the users think IT is full of it!

So now, instead of helping to build and develop a positive relationship between the user community and IT, the service level agreements are themselves becoming a source of conflict and mistrust.

So how do you avoid this?

First, and most importantly, DO NOT include availability as a service quality criterion in your SLA. What should you use instead? Well anything you like... anything that reflects service quality from the user (and not the IT) perspective. Maybe reliability and service recovery (see later)?

Secondly - restrict the service quality criteria and associated performance targets that are in your SLA to a few key and meaningful things. Do not try to measure everything - this is just confusing. Instead concentrate on what is really important.

A suggestion: instead of availability, why not use reliability (MTBF) and service recovery (maintainability - MTTR) as your key service quality criteria and have service performance targets for both? Reliability would be defined as the maximum number of unplanned service outages within a given time period, and service recovery would state the maximum

So our server performance was once again at a high level of 99.6%, based on a target of 80% of the available agreed 90% of working hours, with a network resilience quotient of 99.5% and individual response times measured at an average of 0.3 seconds. Our Helpdesk answered 27,943 calls with an abandon rate of only 8%, average call duration 2.8 minutes and a first time fix rate of 56% of the target resolvable 75% of incidents. Our SLA performance was again in the high 90s with only 5 major breaches and an average fix time of 8 hours for P2 incidents. Once again our customer satisfaction was at 94%, based on our regular surveys...

...er...
...what was your question, again?...



time any single unplanned service outage would last.

Of course for this to work you would have to agree with the users what an unplanned service outage actually is. And you would of course have to be able to measure the number and duration of unplanned service outages as experienced by users.

But even with these issues it is still a significantly better way to measure service quality than using availability and the 99.xx% that means nothing.

Tip 4. Keep them up to date

Service level agreements are not written in stone. It is essential that they are kept up to date and relevant. You must be prepared to update them at any time to reflect changing service quality requirements, IT capabilities etc.

To make sure this happens you need to ensure that every SLA has an expiry date. I would suggest a maximum life span of 12 months. This forces you to review and update each SLA on a regular basis, and this in turn ensures that you avoid the very common problem of having lots of completely irrelevant and out-of-date SLAs in place.

Many IT organizations seem reluctant to update an SLA that is in place. The argument is that it just takes too much work to constantly update SLAs. This is the wrong attitude. If you take this approach you will indeed cut down on the amount of work required to maintain your SLAs, but it will simply mean that the SLAs you have in place are increasingly irrelevant and obsolete.

Because the service quality criteria and performance targets in the SLA will become increasingly meaningless, the fact that IT is meeting the targets is simply irrelevant. This will again lead to deterioration in the relationship between IT (who think they are performing well) and the user community (who cannot understand why IT thinks they are performing so well!).

Tip 5. Finish your service catalogue before starting to develop SLAs

Don't be tempted to rush into starting to develop SLAs before you finish your service catalogue. Otherwise, you are likely to fall into the trap of trying to develop SLAs before you have any clear definition of your services. This means that the person tasked with developing and agreeing the SLAs is forced, usually under pressure from tight deadlines, to start by defining the service itself.

The result is usually an inconsistent definition of services, and (because of time pressures) the danger once again that the service will be defined and documented from the IT and not the user perspective - focusing more on what a technical IT system does rather than on what IT services and business outcomes are delivered.

If you already have SLAs in place, but no definitive service catalogue, I would urge you to develop one as quickly as possible. Once you have this in place you should revisit all your SLAs to ensure they are consistent (in terms of definition of services etc.) with the service catalogue.



Charles Fraser is a highly experienced freelance ITSM consultant. His areas of specialist expertise include ITIL process maturity / effectiveness assessments, and helping organizations to achieve ISO20000 certification. He can be contacted at Charles.fraser@CharlesFraser.net



MANAGING
COMPLEXITY

CLOUD, COMPLEXITY AND CONFIGURATION



SIG chairman Richard Horton (second right) with members of the Transition Management SIG at the event

RICHARD HORTON REPORTS ON EVENTS AT THE RECENT TRANSITION MANAGEMENT SPECIAL INTEREST GROUP MEETING, WHERE ATTENDEES WRESTLED WITH THE IMPLICATIONS OF CHANGE, RELEASE AND CONFIGURATION MANAGEMENT IN A CLOUD-BASED WORLD.

Is ITIL theory still relevant when we look at the shifting context within which we do our IT Service Management today?

That's a broad question stimulating much debate. The latest Transition Management SIG meeting homed in on some specific aspects of the topic, while still leaving it general enough to allow wide ranging discussion. We focused our attention on the Cloud and what that means for how we do Service Transition, specifically managing release and configuration. We set our stall out at the start - our hosts, Atos, are fully immersed in providing Cloud services and have embraced wholeheartedly the challenges of moving to this from other models of service provision. So the contributors to this event represented both provider and consumer sides of the service model.

Sean Catlin of Canopy, Atos' Cloud partnership with EMC and VMware, gave us the provider's perspective. There are many flavours of Cloud: what does providing a range of offerings mean for the provider? How should the provider think differently to provide the economies of scale required to make this work while still providing offerings which will be attractive to potential customers? What technologies

are embraced to make this happen, and what are the broader implications of all this? What, for example, does it mean for change and release management to adopt the fast paced 'bleeding edge' approach to change that has been necessary to succeed? Sean highlighted how looking at the challenge of NoOps is helping Atos deliver simple flexible services.

Jason Knight of Jaguar Land Rover then offered the consumer's view. Working with TCS as an integrator, JLR have faced a different set of questions as they have sought to establish control over systems. What are the implications for delivering a seamless service when you have multiple Cloud offerings contributing to that service? The focus here was less on technology and more on processes, sharing knowledge and relationships that allow for the restrictions that Cloud offerings bring. Clarity over responsibilities and definition of tight processes has enabled effective control of releases at JLR.

From here Peter Mills of Arqiva guided us through considerations of configuration. Although the Cloud makes the picture complex for us, configuration management has had to cope with similar complexities for some time. Virtualization and other

technologies change what the contents of the CMDB look like. Consumers need to understand what they have bought as this will help identify what areas they have to worry about and where the provider's responsibility starts and stops. The management of the Cloud from a consumer's point of view is really about understanding boundaries and managing them appropriately. What is required for billing and the management of cost is an area where both parties will have an interest in the configuration.

The day as a whole provoked lively discussion, with a couple of workshops drawing out the perspectives of both provider and consumer and exploring how they work together. A workshop on configuration took us back to the question I started with, the relevance of ITIL. After brainstorming a range of ideas, we picked out the top five and then prioritized them. What we were left with dovetailed nicely with ITIL theory. Cloud and such developments may change the landscape and how we think about it but the ITSM factors we need to take into account still remain.



Interested in joining the Transition Management special interest group? Contact the office on 0118 918 6500 for further information.



SKILLS

AND THE SURVIVAL OF THE SERVICE MANAGEMENT FITTEST

BARRY CORLESS DRAWS ON AN ANCIENT SOURCE OF WISDOM IN HIS QUEST TO DEMONSTRATE THE BENEFITS OF GOOD SERVICE MANAGEMENT.

In trying to make service management more accessible to the masses I often draw parallels with events and philosophies outside IT and business. Modern life provides many examples but every so often you can reach back into the annals of history and find inspiration there. One such

source is the often quoted book *The Art of War* written by Sun Tzu, a 5th Century BC Chinese general. On the basis that one should never let the age of the advice cloud our judgement, I recently took the opportunity to delve into this ancient text.

survival of the service management fittest

I first came across The Art of War when both Michael Douglas and Charlie Sheen referred to its advice in Oliver Stone's 1987 Hollywood blockbuster Wall Street. Watching a re-run some years later, I decided to download the e-book onto my i-Pod and see what all the fuss was about. I was immediately impressed by the relevance of the book and, reading it for a second time, I began to draw parallels with the 'battles' that many CIOs, IT managers and service managers may need to fight with other service providers.

Sun Tzu talks about the Art of War being the path to safety or ruin. Well, service management certainly matches up there. This first part of the Chinese general's advice concerns five constants, the mastery and understanding of them being key to victory. Know them and you will not fail, preaches the master tactician and strategist. The five constants and their ITSM equivalents are:

- 1. The moral law** - Roughly translated this is Sun Tzu saying "know the organization, its values and its objectives". No service provider can ever hope to succeed without the dual focus provided by a simple strategic target and the understanding of its own and customer organizations' cultures.
- 2. Heaven** - Understanding times, seasons, day and night were high on Sun Tzu's list of imperatives for war. Providing quality service is a thousand times more difficult if we are unrealistic about timescales, fail to take account of mission-critical periods or are just plain ignorant when resource planning and setting customer expectations. How many times have you seen false promises as part of aggressive project plans, with activities planned right through the prime holiday season in August or at financial year-end?
- 3. Earth** - Distance and terrain are next... translated, this means the dangers and risks posed by the ground you intend to wage war on. Sun Tzu was obviously an exponent of the baseline. He talks about studying and learning from a baseline before going into battle, weighing up the feasibility of the battle based on the ground. Sun Tzu had mountains, rivers, and valleys; in ITSM we have services, tools, people, processes and price.
- 4. Commander** - Leadership had to come into the equation. Sun Tzu chooses to personify this in the commander of his army, retaining the loyalty of the troops. A well trained commander must be experienced in going to battle, familiar with the five constants and able to get the best out of the resources available. If you're a service manager and have never been in that battle, what on Earth have you been doing?
- 5. Method** - Sun Tzu believes in balancing the marshalling of the army, the tactics and the finances in a drive to produce constancy. Is the idea of using ITIL-

based processes to achieve a consistent level of service for which business customers can plan really any different?

With our five constants 'in the bag' we now move onto another facet of Sun Tzu's advice. Sun Tzu talks about seven considerations that will define who will win a battle. We all work under constant scrutiny of our value benchmarked against other service providers. It seems inconceivable that we won't come up against them at some point to 'battle' for business or ultimately our jobs. "Pick your battles" was Sun Tzu's guidance. When he did go into battle he seemed to have the bases covered again.

Here are the seven considerations for the service provider organization going into battle:

- **Are you in line with the 'moral law'?** Sun Tzu was trying to tell us the just will win. The service organization best positioned to align with the culture and objectives of its customer will be successful. Yep, it really is that simple.
- **Who has the best leader?** People follow leaders because they want to. People follow managers because they have to. They'll go the extra mile for a leader they trust and who trusts them. The leadership and influence of senior management and champions is a key success factor in many aspects of service management, particularly transitions.
- **Who is in the best place with regards to Heaven and Earth?** The physical high ground or perhaps a river to protect a flank, maybe even the timing of an attack, were the types of advantage Sun Tzu said were crucial. It is never the absolute guarantee of victory but the service provider with the best toolsets, information, processes and services tends to enter any battle with a significant advantage.
- **Where is discipline best enforced?** Sun Tzu certainly didn't believe in circumventing process. The army must obey the commander's orders. The commander can't be everywhere, so it is essential for his lieutenants to understand the plan of battle and have the freedom to operate within it. Was Sun Tzu one of the earliest exponents of a sound governance model? Governance will define which is the better service provider. The service provider that can still operate even when its leaders are isolated and out of communication will be victorious.
- **Which army is stronger?** In Sun Tzu's battles, the better fed, resourced and supplied army will stand the ultimate chance of winning. The right resources, in the right place and at the right time, can make you look, feel and actually be stronger. Capacity management and supplier management were as vital to Sun Tzu's efforts as they are to yours.
- **Who is best trained?** All the hardware, software and processes in the world will

only ever be as good as the people using them. An impressive array of weapons in the wrong, untrained hands can actually do greater harm than good, simply because the customer may expect so much more.

• **Where is constancy best displayed in reward and punishment?** Sun Tzu believes that "Soldiers must be treated in the first instance with humanity, but kept under control by means of iron discipline". If a service manager is a dictator and does not strive to win the respect of the team, the team will not follow; or worse still, they may only pretend to follow. Conversely if the leader is adored by his people but refuses to discipline them, the result is equally unproductive. The key is to find a balance between the two.

Sun Tzu's principles of war readily find many modern parallels if applied to service provision. I'll leave the last word with Gordon Gekko from Wall Street. He knew the power of information, preparation, strategy and design before ever getting close to making a trade or going into battle for a company. I'm not suggesting we should break the law to win business but look at Gekko's source of wisdom:

“I don't throw darts at a board. I bet on sure things. Read Sun Tzu, The Art of War. Every battle is won before it is ever fought.”

Who'd have ever believed that using the checklist and tactics of a 5th Century BC Chinese general would lead to success in IT service management? It's my contention that Sun Tzu would have made a hell of a service manager and a fearsome opponent in a tender situation.



Barry Corless is Business Development Director at Global Knowledge and vice chairman of the Problem Management SIG.



ITSM AND
AGILE

IS MOBILITY MAKING YOUR OPERATIONS MORE AGILE?



ROB STROUD CONSIDERS THE DISTINCTION BETWEEN CHANGES THAT REQUIRE HEAVY-WEIGHT PROCESSES AND THOSE THAT WOULD BENEFIT FROM A MORE AGILE APPROACH

I was at an event in a hotel in London recently when I had to call for assistance with Internet access. I was constantly swapping one IP connection for another as I moved about the hotel and I noticed that I needed to log in again and again. When the service desk operator asked me how many connections I needed, I replied 5 and was quickly given the 'unlimited' code - as

is mobility making your operations more agile?

according to their records I was already at 5 and I had only connected a single device. This reminded me of the growth in IT and the number of mobile devices running applications. The conundrum for most IT service management organizations is that these mobile apps more often than not bypass the IT infrastructure and our service management processes, yet the users are expecting us to deliver service as if we owned and ran the service. In short mobility is raising the expectations that the business has of IT like never before!

Think for a moment about an app on your smartphone. The app evolves in frequent updates, sometimes almost daily, and the consumer thinks little about these changes (in fact many updates auto-install). If you look at the list of enhancements for an app update on your phone, you will see that each list starts with a series of bug fixes. Today's consumers expect that, should an update fail, a solution will be available within a few hours; otherwise the chances are that they will flip to an alternative product.

Working in the service management world over the last decade, many of us have been maniacally focused on the performance, availability and reliability of systems which were buggy and failed regularly. To resolve what some called the "traditional operations problem," we implemented highly structured and rigorous systems using frameworks such as ITIL for incident problem, change and release across organizations. We removed developers' access to production systems, grouped changes into releases that were only implemented within specified change windows, and 'de-risked' everything—almost to the point of organizational paralysis.

Today, the delivery of IT-enabled business is quite consistent in quality and availability. The new generation of savvy business professionals is leveraging technology as a major disruptive weapon, but in an evolutionary, rather than revolutionary way. Yet we still have backend systems that our business depends on for day-to-day functioning and these **MUST** be effectively managed to ensure not just availability but more

importantly integrity of the information and the business processes they support.

Clearly, all changes are not created equal and the problem with many IT organizations is that we have been treating them all with similarly heavyweight processes. Service management must evolve so that we can use agile approaches where practical to respond to rapidly changing business expectations.

I strongly recommend that we take a lead from our application development brethren who saw this change occurring well ahead of operations. In 2001, a group of visionaries got together to develop "The Agile Manifesto" (<http://agilemanifesto.org/>). The scope of the manifesto was to uncover better ways of developing software, individually and through communities. While Agile software development focuses on keeping code simple, testing often and delivering functional bits of the application as soon as they're ready, the Agile Manifesto was created as an alternative to document-driven, heavyweight software development processes such as the Waterfall approach. Of course Waterfall still exists – this methodology is used for large changes to "systems of record" – but the focus for application development is matching the correct demand type to the correct execution process.

It is time for the operations organization to get agile and we in service management must transition to implement processes than can support rapid change. For example the tried-and-true change management process, where every change is highly documented, reviewed by a Change Advisory Board (CAB), and then scheduled in a change window, will no longer suffice. Much of today's change – such as website updates or changes to a mobile app – simply doesn't fit these criteria.

Now, not all change is agile in nature and traditional organizations have started to introduce pre-approved changes that are typically automated across the lifecycle using an orchestration or automation tool. That said, we need to go further and accelerate the categorization of change

types in order to better identify changes. In short, fewer changes for the CAB meeting or maybe even fewer CAB meetings.

Those of us involved in service management must start getting engaged with the business and the application development function at the point where change is initiated, back at the demand phase, so that we can help to identify those changes that can offer quick benefits with minimal risk, and implement them more rapidly using an agile approach. Meanwhile, those changes which are high profile, high risk, and require lengthy development can be effectively communicated to the business in terms of the value of good controls supported by the current good practices. Expectation setting with the business!

A good example of this approach can be seen at a retail bank operating in North America. The bank has implemented a process that identifies changes that target innovation, such as a new client assessment web form that is perceived to have little impact on the overall business but could offer real innovation, leveraging web and mobile delivery, if DevOps is used as a philosophy. The development organization are constantly updating their new products and services (without sacrificing testing, which is automated) while branch systems can use a more traditional ITIL-like process. Then changes to the core banking system, a system of record, is managed according to traditional processes. The results include increased business satisfaction with faster time to market for new business services, while the availability of the core systems is at record levels.

What is clear here is that one size for change doesn't fit all. Where is your organization in this evolution? How quickly are you adapting? Remember, if you do not evolve you will soon be irrelevant or by-passed by Shadow IT... more of which next time!



Rob Stroud is Vice President, Strategy & Innovation, at CA Technologies and winner of the 2013 ISACA Wasserman Award.

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