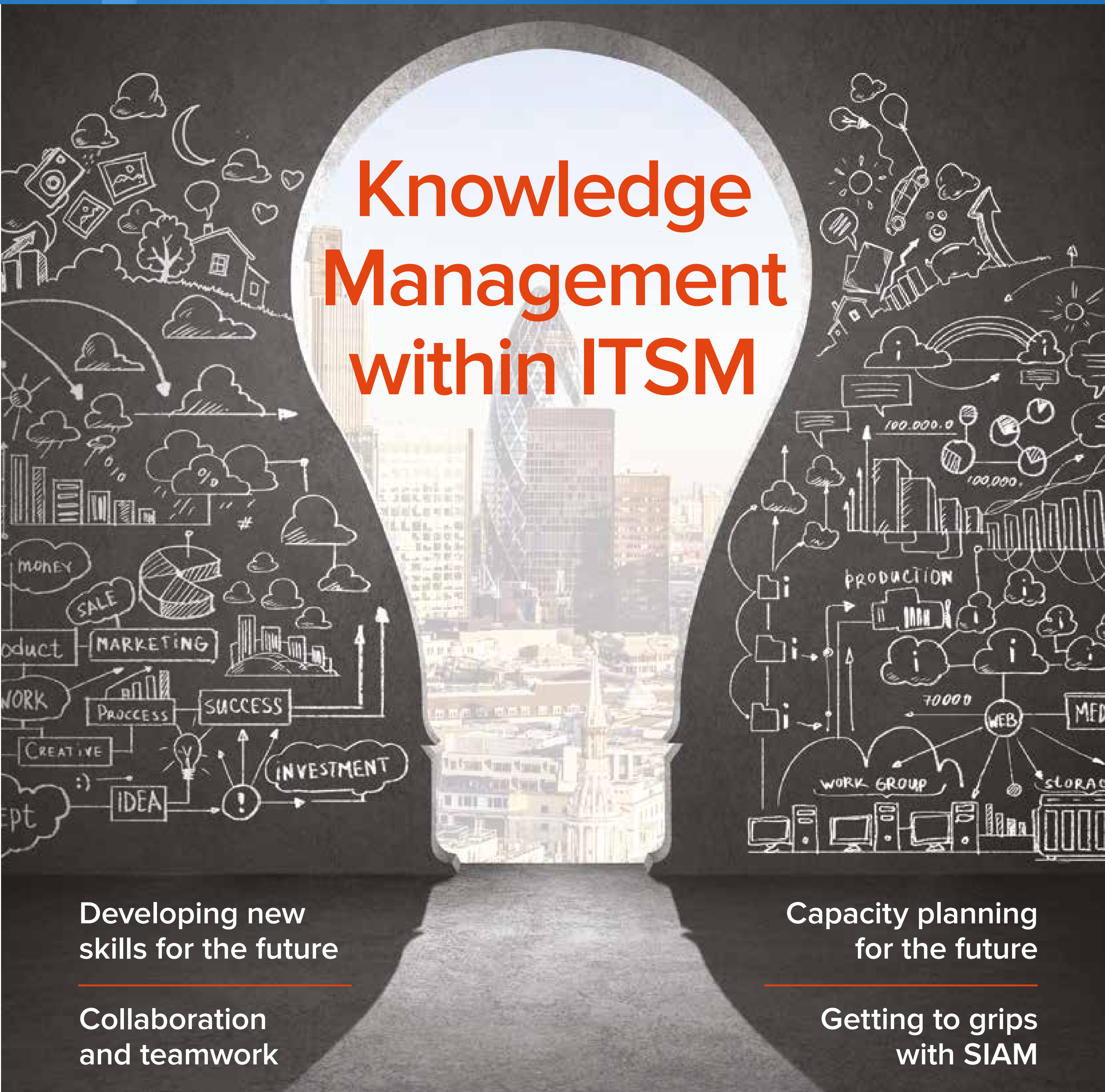
AUTUMN 2015

itSMF UK

serviceTALK



Knowledge Management within ITSM

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Capacity planning for the future

Getting to grips with SIAM

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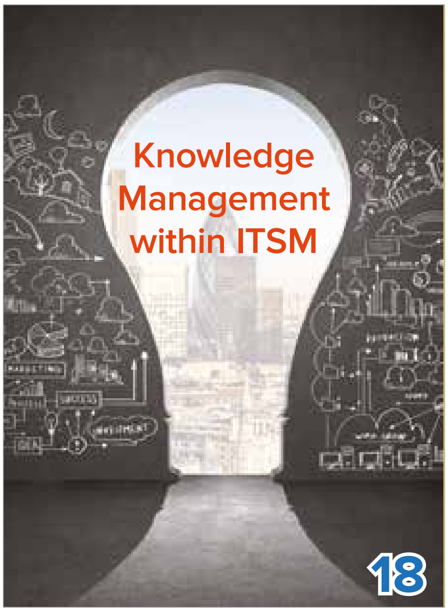

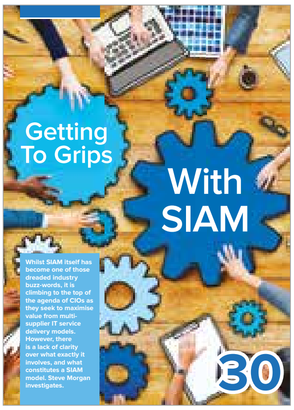

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A binge-watching we will go!

Collins English Dictionary recently announced its 2015 Word of the Year – binge-watch, meaning "to watch a large number of television programmes in succession, especially shows from one series". Lexicographers claim that usage of the word was up 200% on 2014, fuelled by the prevalence of TV subscription services such as Netflix. If binge-watch strikes you as a little unedifying, you might consider some of the runners-up: contactless (a reference to smart cards, I think, but it could equally mean "a shortage of friends due to excessive binge-watching"), the very topical Corbynomics, or one with which I immediately identified, dadbod, meaning "an untoned and slightly plump male physique".

I like Collins' Words of the Year. They are a clear reminder that language is constantly evolving to reflect the needs and moods of the day. We learn the basics of grammar and vocabulary in our early years, but we'd soon lose the ability to communicate if we ignored new words and phrases or the subtle changes in the way that existing terms are used. OK, I'll admit that I shudder a little when I hear 'literally' used to mean 'metaphorically' when it should mean the opposite, but on this point even that bastion of lexicography the Oxford English Dictionary concedes: "[The OED] is not an arbiter of proper usage, despite its widespread reputation to the contrary... Its content should be viewed as an objective reflection of English language usage, not a subjective collection of usage 'dos' and 'don'ts'."

Sounds a little like service management. We have plenty of guidance but who's to say what's really right and wrong? The IT world is moving forward at a furious pace and, although most service management professionals will have been through the various levels of formal training, they constantly need to adapt their knowledge to fit different technical scenarios and changing business requirements. And like dadbod and binge-watch, our industry is peppered with changing terminology, new solutions to old problems and old solutions to new ones.

This issue of ServiceTalk addresses many areas where ITSM specialists are struggling to embrace change – knowledge management, release management, capacity planning and service integration. All of these complex topics are changing fast and require new or adapted skills. It's absolutely critical, as attendees at our latest Midland region event concurred (page 24), that we equip the next generation of service management newcomers with both theory and practical experience to prepare them for the daunting tasks that lie ahead. And as our article on collaboration explains (page 14), one of the most essential attributes for students and professionals alike is enthusiasm for teamwork, the ability to share knowledge and achieve real success through the different strengths and perspectives of colleagues.

One of the best places to find out about more about the changing service management landscape is the ITSMF UK Conference, which brings together the most dedicated and innovative practitioners for two days of intensive networking. I hope you get the chance to attend – it's a great experience – but if not, remember to keep an eye on all our member events throughout the year where specific topics are discussed and new skills developed.

Happy reading, and I hope you get a chance to take in some binge-watching too!

Mark Lillycrop
Communications & Professional Support Manager
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Profile, engagement and effectiveness

I'm delighted to be taking on the role of CEO for ITSMF UK for the next six months. Since this was announced I've received tremendous support from across the industry, with hundreds of positive messages. Thanks for all of these - I appreciate the sentiments and expectations and so there's a job to be done...

I will try to share messages and information about plans and activities as much and as transparently as possible – the initial short-term focus is on the conference, which I am really looking forward to and where I hope to see as many of you as possible. Whether you opt to attend both days or you choose a one-day conference or exhibition pass, please do try to join us for what is always a sociable and rewarding event.

As an organisation there have been a number of changes recently – we are now a relatively new Board and can forge a new and positive direction. It's also great to have some C-Level representatives joining the Board from member (service delivery) organisations – their input will be invaluable.

My focus will be on three areas – (1) managing and supporting the ITSMF UK office and team to be as successful as possible, (2) looking at new ways to deliver value, including new products from ITSMF, plus (3) reaching out to as many potential partners and industry organisations as possible to widen the ITSM debate and achieve more as a unified industry.

Work has already commenced to follow up the recent Leadership Council initiative, with some research commissioned to look at how to develop our skills framework. We are also starting to look, again with the support of the Council, at new ways to promote and market the industry and the ITSM value proposition. I will also be talking also to a number of other membership organisations about how they manage and maintain their services.

So initially I'll be making myself available for conversations on collaboration and synergy – please contact me directly if you would like to engage. I'll obviously be available at the conference and I hope to see you there.

My goal is to raise the profile, engagement levels and effectiveness of ITSMF UK – I look forward to your continued support in getting there.

Best regards

Barclay Rae
CEO
barclay.rae@itsmf.co.uk

New professional development agreement between **ITSMF International** and **AXELOS**

ITSMF International has agreed a new global partnership with AXELOS, owners of ITIL and PRINCE2.

As part of the new partnership with AXELOS, all ITSMF members will be eligible to take advantage of a lifetime discounted membership of AXELOS' new Professional Development Programme which launched in September 2015.

The AXELOS Professional Development Programme is an online membership programme, aligned to the best practice frameworks of ITIL and PRINCE2, and is designed to support professional development. Members of the programme will be able to complete Continuing Professional Development (CPD) activities to enable them to earn a digital badge linked to their ITIL and PRINCE2 qualification.
Other key benefits of the new collaborative global agreement between ITSMF and AXELOS include:

- The development of emerging practices, existing best practices and innovations amongst subject matter experts and IT managers to enable business value through the power of IT services, capabilities and resources
- Co-hosting corporate forums for senior leaders to exchange views and ideas on industry direction, AXELOS strategy, product roadmaps and case studies
- Helping to embed a culture of professionalism across the global community through awareness of the AXELOS Professional Development Programme
- Conducting a joint annual global ITSM survey to identify industry trends
- Co-developing and sharing white papers and other IP creation around the world

Shari Brunette, President of ITSMF International, said: "We are excited to work with AXELOS and provide our individual and corporate members greater visibility and value. Immediate benefits are available through participation in the Professional Development Programme, a Programme for which we have negotiated a great discount for our members!

Peter Hepworth, Chief Executive of AXELOS, said: "This partnership between AXELOS and ITSMF is an important development in shaping the future of IT service management. We are delighted to offer the AXELOS Professional Development Programme to ITSMF members, the first of a range of initiatives that will help support individuals and demonstrate the value that IT services bring to an organisation.

ITSMF UK members interested in finding our more about this initiative and joining the AXELOS Professional Development Programme should contact the office.

Global Knowledge®

Global Knowledge hosts **ITSMF UK** online meetings and Members' Forum

As part of our drive to improve member communications ITSMF UK ran the first of a series of member meetings in October, with the support of member organisation Global Knowledge.

Global Knowledge, a worldwide ITSM training provider, kindly offered to host the events. By using their innovative learning delivery format, V&C Select™, our members will have the flexibility to attend in person or as a virtual delegate.

Glyn Roberts, UK Operation Director for Global Knowledge, said, "It's really exciting for us to use our learning delivery solution in conjunction with ITSMF UK. We understand it's not always easy for individuals to take time out of the office whilst also incurring travel and accommodation costs in order to attend these meetings, so this helps them to save time and money. Using the latest collaborative tools and technologies, we offer a solution where the classroom and virtual members attend the same live interactive meeting."

For more information about V&C Select, contact Global Knowledge on 0118 123 456.

SysAid unveils ITSM Business Intelligence powered by Qlik

SysAid Technologies Ltd, a leading provider of IT service management (ITSM) solutions, has unveiled a new business intelligence (BI) tool powered by Qlik, a leader in the visual analytics market. SysAid is the first ITSM solutions provider to offer BI as a native feature inside its software, says the company. The new BI tool and an improved reporting interface will be released this December in SysAid Winter 16.

"Our aim is to provide SysAid customers with the best BI solution available, and Qlik was the clear choice," said Sarah Lahav, CEO of SysAid. "We built Qlik right into SysAid Cloud so that users don't have to deal with implementation, hardware or licences. SysAid customers will be able to advance their business with the first BI tool dedicated to ITSM.

"Qlik will enable SysAid users to drill down into ITSM metrics with unprecedented speed and comprehensiveness. From incident categories to workload distribution, Qlik provides the smart visualisations and advanced navigation capabilities that IT leaders need to improve performance and resolve problems. Qlik's guided analysis paths will help users ask the right questions and get answers quicker than ever before."

ITIL Practitioner launch slated for February 2016

AXELOS is set to globally launch its latest qualification, ITIL Practitioner, in February 2016.

Speaking at the FUSION15 service management conference in New Orleans, AXELOS chief executive Peter Hepworth described the new qualification as the most significant recent evolution in the ITIL best practice framework, which was first introduced in 1989.

The framework, which has gone through several iterations, is currently used in more than 150 countries globally with more than 300,000 ITIL exams sat in 2014.

ITIL Practitioner is intended to equip ITSM professionals with skills to successfully adopt and adapt ITIL to improve service management capabilities in line with business goals. It will be the next step after ITIL Foundation for professionals who have already learned the basics of ITSM and the business value of well-designed and delivered services.

A new publication, "ITIL Practitioner Guidance", covering the skills and practical application of knowledge, is expected to be available in February, with the first exams also due to be sat the same month.

The Open Group IT4IT Forum launches first standard

The Open Group, the vendor neutral IT consortium, has announced the launch of its new IT4IT Reference Architecture Standard at its conference in Edinburgh.

Just a year since the launch of the IT4IT Forum, this new standard will provide a vendor-neutral, technology agnostic and industry agnostic reference architecture for managing the business of IT. It will provide prescriptive guidance on how to design, procure and implement the functionality needed to run IT.

The operating model defined by the IT4IT Standard serves the digital enterprise with support for real-world use-cases (e.g. Cloud-sourcing, Agile, DevOps, and service brokering) as well as embracing and complementing existing process frameworks and methodologies (e.g. ITIL, CoBIT, SAFe, and TOGAF).

The launch of the standard will be followed in early 2016 by the release of a Foundation Level training course and exam. Higher-level training and certification programs for IT4IT will also become available during the course of next year. There will also be a number of publications available over the next few months including the IT4IT Reference Architecture Pocket Guide and the IT4IT Reference Architecture Management Guide.

Cherwell Software and Dell establish strategic alliance

Cherwell Software has announced a strategic technical alliance with Dell to deliver an expanded set of IT management features to their respective customers. As part of this agreement, Cherwell's world-class IT service management (ITSM) capabilities will be an available integration from within the Dell KACE® product for customers who wish to access Cherwell's ITIL-compliant solution.

Dell KACE's powerful endpoint management functionality will be integrated into Cherwell Service Management. The partnership signals Cherwell's and Dell's shared mission of helping enterprise customers manage and optimise their IT infrastructures—whether they are approaching it from a services or asset-centric perspective.
An initial integration between the products exists today, say the companies, and the partners will work closely to build deeper and more comprehensive integration through shared APIs.

THE ITSM SOFTWARE TOOLS FORUM

February 2016, Copthorne Tara Hotel, London

Finding the right ITSM products and implementing them correctly is a challenge for any organisation, and keeping abreast of the latest software developments is becoming increasingly difficult as users have less and less time available to explore the options.

ITSMF UK's ITSM Software Tools Forum offers an unprecedented opportunity to bring vendors, consultants and potential buyers together under one roof to discuss product selection and implementation.

This event will appeal to those looking to reduce their costs, streamline their existing IT service infrastructure, and implement new processes more quickly and efficiently with the help of software tools.

KEY QUESTIONS ANSWERED

- What's new on the ITSM tool market?
- How do you ensure you select the right ITSM tool to meet your needs and expectations?
- How do you select the right partner or consultant?
- What are the major pitfalls to avoid?
- How much should you expect to pay for a solution?

itSMF UK

ATTENDANCE FEE:

MEMBERS: FREE
NON-MEMBERS: £150 + VAT

Contact **events@itsmf.co.uk** or call **0118 918 6500** for further information or to reserve your place.

A fresh new structure for the ITSMF UK Board

ITSMF UK's constitution was changed during the summer to give the organisation a fresh, modern structure for the future, with new Articles of Association and a new line-up on the governing Board. Alongside our Chair Rosemary Gurney and Finance Director Lorna Hinds-Sotomey, we now have three directors who have been elected to represent specific areas of the membership: Richard Horton (SIGs and Regionals), Dave Backham (Individuals and Small Enterprises), and Martin Neville (Large Enterprises/Corporate Members).

Two further directors have been appointed – **Dave Walker** of LV= and **Chris Williams** of EE (see the profile on the right) – while **Barclay Rae** has joined us as Interim CEO, a six-month part-time appointment.

For further information about the new structure and recent Members' Meeting, see View from the Chair on page 12.

Countdown to Conference

itSMF UK ITSM15 NEW CHALLENGES NEW SOLUTIONS

We're in the final stages of preparation for ITSM15, our annual conference at the Sofitel Heathrow. It promises to be a great event, with four packed streams of educational sessions, some great keynotes, and of course our annual awards dinner. It also provides the perfect opportunity for education and networking. **Book your place or check out the full agenda and other details at www.itsmf.co.uk.**

Corporate ITSM heads join the Board

Two recent appointments to the ITSMF UK Board are Chris Williams and Dave Walker, both members of our ITSM Leadership Council.

Chris is a highly experienced IT and network professional who has been involved in the industry for over 15 years and an ITSMF member for over 10 years. He brings with him a wealth of commercial knowledge as well as previous experience in the telecoms and financial services industries. Currently Director of Service Management for EE, he has responsibility for the mobile network as well as IT. Chris is a regular speaker at events and a keen supporter of our ITSM Industry Awards.

Dave is Head of Service Management at Liverpool Victoria Friendly Society (better known as LV=), overseeing the organisation's adoption of ITIL and ISO/IEC 20000 and ISO 38500 certification. More recently LV='s Continual Service Improvement initiative, branded 'Passion for Service', has been the subject of a number of AXELOS podcasts. A classic car enthusiast in his spare time, Dave says he is looking forward to joining the Board to help further the mission of the ITSMF, to share and gain experience and to promote service management as a recognised profession.

New additions to our family of special interest groups

Our Special Interest Groups (SIGs) provide the lifeblood of ITSMF UK, focusing on key areas of concern for service managers and developing new guidance and content to help other professionals working in these areas.

Our SIAM SIG, which launched earlier this year, has attracted huge interest and the group members are already meeting on a regular basis to compare notes and crystalise their ideas around service integration. The CSI SIG has also re-established itself after a dormant period, and is inviting new members to take part in its next meeting. Please contact Steve Morgan or Phil Green via the website if you are interested in SIAM or CSI respectively. FInally, with SLM SIG Chair Barclay Rae moving to the CEO role, his place has been taken by Tony Oxley.

Thanks to all our SIG Chairs (including Barry Corless at Problem Management, Matt Hoey of Service Transition and Suzanne Slatter at the Service Design SIG) for keeping the lifeblood pumping.

The one-stop ITSM reference

Don't forget that the itsmf.co.uk website offers a great range of reference and information resources for members:

- ServiceTalk - the latest issues of our flagship magazine, covering topics such as SIAM, the Cloud, ITSM beyond ITIL, BRM, cyber resilience, agile, DevOps, and service culture
- The ITSMF UK pocket guides - download our dedicated guides to CCRM, ISO/IEC 20000, SFIA and Service Level Management, plus our ITSM dictionary
- Standards and frameworks in business and service management - check out these three-minute outlines of 36 ITSM-related frameworks
- A huge range of papers and articles provided both by members of ITSMF UK and other organisations
- A link to the TSO bookshop, where members can pick up service management books and related titles at a 15% discount.

CHANGE BEGINS AT THE TOP
ITSM LEADERSHIP COUNCIL

Leadership Council

In the summer we announced the start of the ITSM Leadership Council – a gathering of senior executives primarily from large corporates, who come together to discuss the key issues for the organisation and the industry as a whole.

The Council has formed two working groups, one on skills and the other on the future direction and marketing of ITSM, which will be reporting back to members before the end of the year. The next full Leadership Council meeting follows the second day of Conference on 24th November – **more news in the next issue.**

Office move

Our office move over the summer completed successfully, and the ITSMF UK staff team are now based in new premises in Bracknell, Berkshire.

Apologies for the initial problem with our direct phone lines which we are working hard to rectify.

The new address is
Premier Gate,
Easthampstead Road,
Bracknell, Berkshire,
RG12 1JS, UK.
Tel: 0118 918 6500.

Congratulations to this year's ITSM Award finalists...

itSMF UK
ITSM 15
NEW CHALLENGES
NEW SOLUTIONS

We have an excellent line-up of finalists this year. Thanks to all those who put forward a nomination or helped with the judging process. All the winners will be announced at the Awards Dinner at Conference on 23rd November.

Service Management Project of the Year
SPONSORED BY MARVAL SOFTWARE

For the organisation that has completed the most successful and challenging IT Service Management project during the year.

FINALISTS
Sungard AS
EE
Scottish Government

Service Innovation of the Year
SPONSORED BY FOX IT

For the organisation offering the most novel product or service offering that has been developed over the past year. Finalists will be assessed on the level of ingenuity and inventiveness in their offering and the originality of the solution.

FINALISTS
Knutsford Academy
EE
Aviva

IT Service Management Team of the Year
SPONSORED BY HP

For the members or leader of a team that have supported each other and their customers in providing inspirational service delivery and significant business benefit.

FINALISTS
EE
Yorkshire Building Society
NTT DATA

Senior Leader of the Year
SPONSORED BY PEOPLECERT

For a senior manager or director who has demonstrated not only an exemplary and well-rounded level and breadth of knowledge, skill, experience and accomplishment in ITSM, but also exceptional strategic leadership of people.

FINALISTS
Paul Pattinson, Telefonica
Ian MacDonald, Co-operative Group
Damian Bowen, NTT DATA

Young ITSM Professional of the Year
SPONSORED BY SERVICE FLOW

For an individual under the age of 30 who has demonstrated an outstanding level of achievement, ability, team support, rapid progress or business impact in the early years of their ITSM career, and who also promises great potential for future success.

FINALISTS
Michael Bailey, CGI
Mark Curry, PwC
Ashleigh Morgan, LV=
Matt Austin, LV=

Ashley Hanna Contributor of the Year

For an individual who, in the judges' view, has made an outstanding contribution to the ITSMF UK organisation as a volunteer in the last year.

FINALISTS
Steve Morgan, Syniad IT
Rob Stroud, Forrester Research
Anna Leyland, Sopra Steria
Matt Hoey, Grant Thornton

Thought Leadership Award
SPONSORED BY BCS

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

FINALISTS
Mike Simpson, ITSM Consultant, CIH Solutions: Knowledge management within ITSM
Ian Macdonald, Independent Consultant: CSI – making it part of the day job
Priscilla Smith, Global Service Capability Lead, BP: The importance of early life support

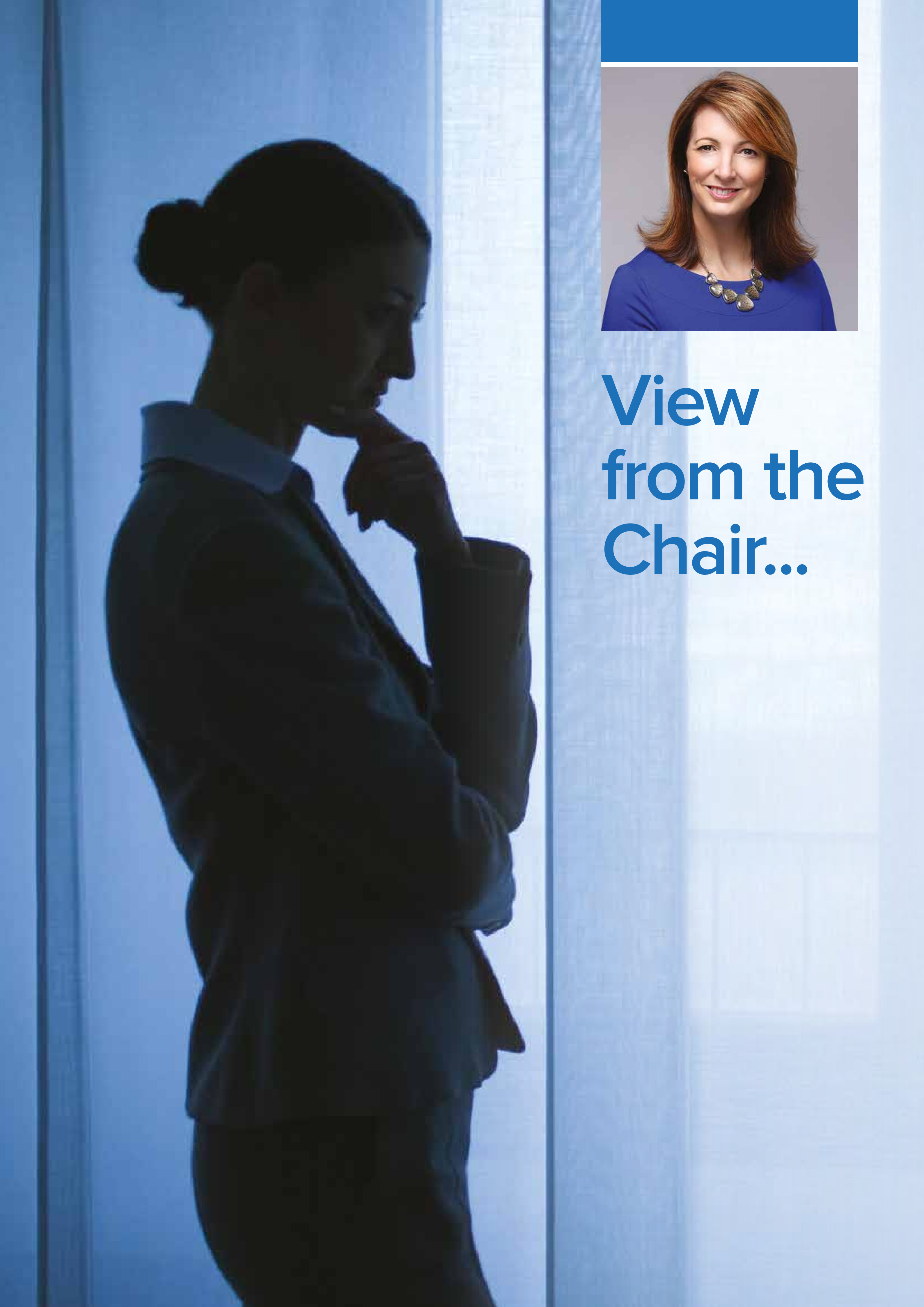
Training Provider of the Year
SPONSORED BY CYIENT

For the training organisation most admired by the judges for their outstanding customer service, range of training resources, outstanding results and/or innovative approach to training development and delivery.

FINALISTS
Fox ITSM
BSMimpact
Smatra
Pink Elephant

Paul Rappaport Award for Outstanding Contribution to ITSM

For an individual who has made a sustained and outstanding contribution over a number of years to the field of IT service management. Finalists are not announced for this award.



View from the Chair...

Hello!

> "Our Conference theme is New Challenges, New Solutions, and it's one that not only resonates in the industry but also reflects the way that ITSMF UK has taken a long hard look at itself this year."

The keen eyed amongst you will have noticed that the face at the top of the page has changed. It goes without saying that I regard it as an enormous privilege to become Chair of ITSMF UK. I simply cannot let the opportunity pass to pay tribute to the tremendous work done by my predecessor in the role. I am sure John Windebank will be remembered as one of the hardest working and enthusiastic Chairs we have known. Having spent the last two years supporting John as Vice Chair, I already have an appreciation of just how hard life can be at the helm but also of the exhilaration of our successes too. It can be difficult to appreciate just how much time members of ITSMF boards around the world put into what are, after all, voluntary roles.

As this copy of ServiceTalk is being prepared for distribution, we're gearing up to welcome many of you to our Annual Conference - this year at a new venue, The Sofitel London Heathrow, with the same excellent networking opportunities and diverse range of speakers and exhibitors that you have come to expect, all in the furtherance of our knowledge and understanding of ITSM.

Our Conference theme is New Challenges, New Solutions, and it's one that not only resonates in the industry but also reflects the way that ITSMF UK has taken a long hard look at itself this year.

Our mission remains the provision of a thriving industry forum for those engaged in the field of IT service management in the UK. We want to enable our members to actively exchange views, share experiences and participate in the continual development, improvement and promotion of ITSM knowledge, best practice and standards. We believe that maintaining the balance between supporting our corporate and enterprise members with that of servicing the smaller corporate and individual members is the best way to harness best practice and innovation for everybody.

A major priority in the last six months has been the challenge of engaging our corporate members in our quest to professionalise the ITSM industry and take it forward. We established the ITSM Leadership Council, which in turn has generated two working groups. The first group is now focusing on the skills required within today's service management profession and on establishing a unified skills framework; while the second group is looking at ways to raise the profile of the sector, to prevent ITSM from remaining the hidden element within IT. Both those initiatives are moving at a pace, with outputs expected in early 2016. Watch this space! In the New Year we'll be giving our Leadership Council members a new challenge: how do we create member services for young ITSM professionals - students, apprentices, graduates etc?

To ensure that we as an organisation remain operationally effective, we also reviewed and re-published our Articles of Association. It may sound like mundane work, but we believe that - through the guidance of not-for-profit legal experts - ITSMF UK now has a governance structure for a 21st Century organisation. If you were able to join us for the inaugural Members' Forum on 22nd October, you'll be aware that this has moved to a second phase with the generation of a set of revised by-laws, due by the end of the year. Another major challenge and a solution which, I trust, will work for the benefit of ITSMF UK and its members.

September saw the first elections for Board positions under the revised structure. Our new format, with all voting taking place electronically, offered a very efficient and effective way of gathering votes. More individuals stood for election than in the past, and many more members than at previous elections actually cast a vote. A massive thank you to all of the candidates who took part, and also to those who participated in the voting process.

Accountability to the membership was another area that we needed to address. Traditionally our AGM was held at Conference, often with less than 5% of the membership represented in the room. The challenge was to find a suitable replacement. We recognised that we needed to provide a forum for members to express their views and opinions, ask questions and challenge the Board – and we believe we achieved all that and more when we held our first on-line Members' Forum in October. Questions were posed prior to the event and throughout the session itself by members in person and on-line, and those issues that couldn't be addressed on the day have been responded to subsequently. Members who were unable to attend can still access the recorded proceedings via the website.

If all this change wasn't enough, we also moved offices over the summer. That was definitely a challenge, clearing away ten years' worth of accumulated paper work, brochures and old Conference bags to enable us to move to our new premises in Bracknell. Think moving home and multiply by ten! I know the whole Board were hugely appreciative of the work put in by the office staff during this time and for making the move as pain-free as possible for all concerned.

As we move on to a new chapter, we do so in a very positive frame of mind. We fully intend to remain true to our guiding principles of independence (in that we will not be unduly influenced by any single member, supplier or stakeholder) and 'for the members'. Our member organisations and the volunteers who work for them are key to everything the Forum does and are ultimately responsible for our direction. We continue to be grateful for all of the time, energy and expertise you expend on our behalf.

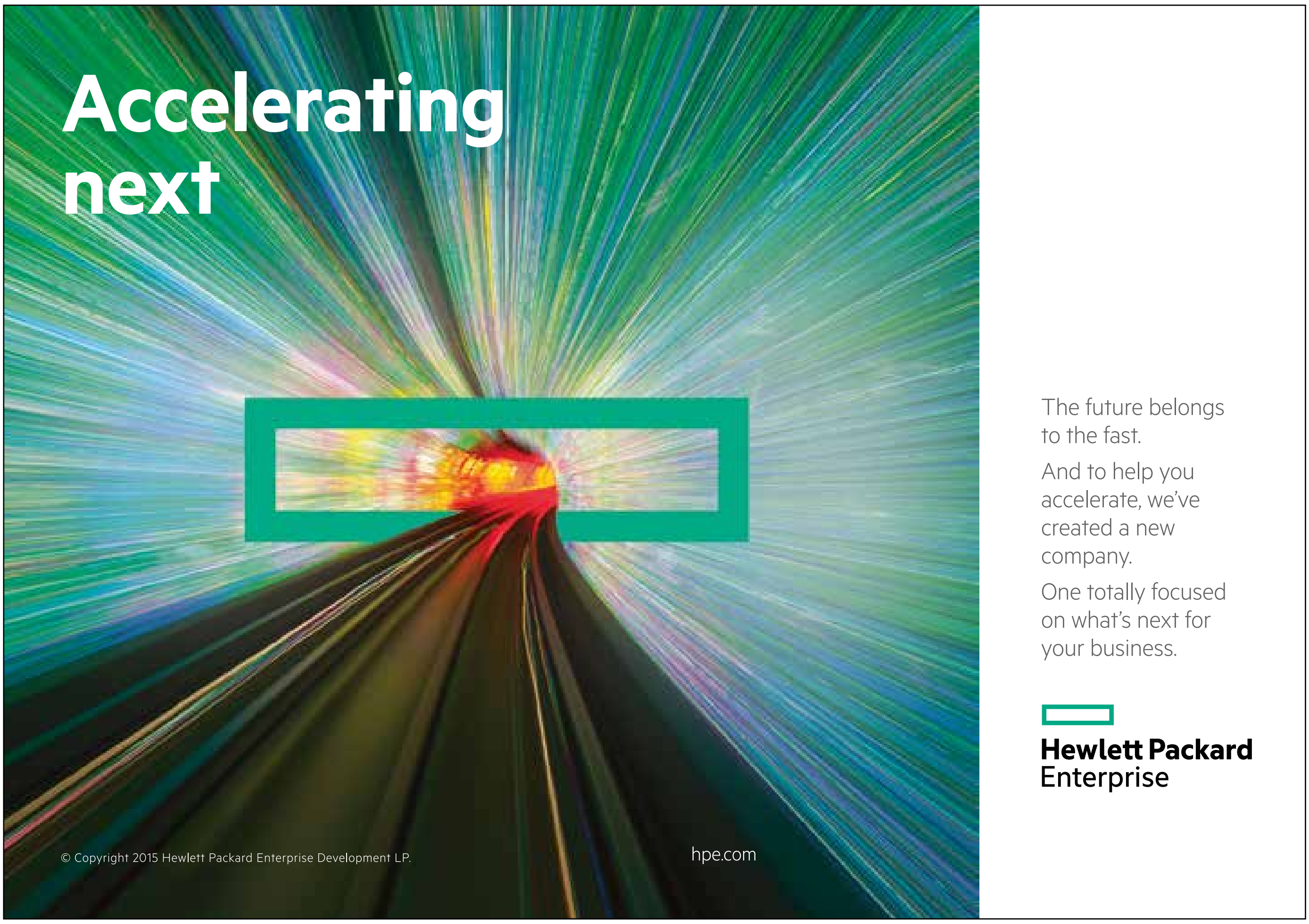
I look forward to seeing as many of you as possible at our Annual Conference and Awards.

Best regards

Rosemary Gurney

Rosemary Gurney

> "A major priority in the last six months has been the challenge of engaging our corporate members in our quest to professionalise the ITSM industry and take it forward. We established the ITSM Leadership Council, which in turn has generated two working groups. "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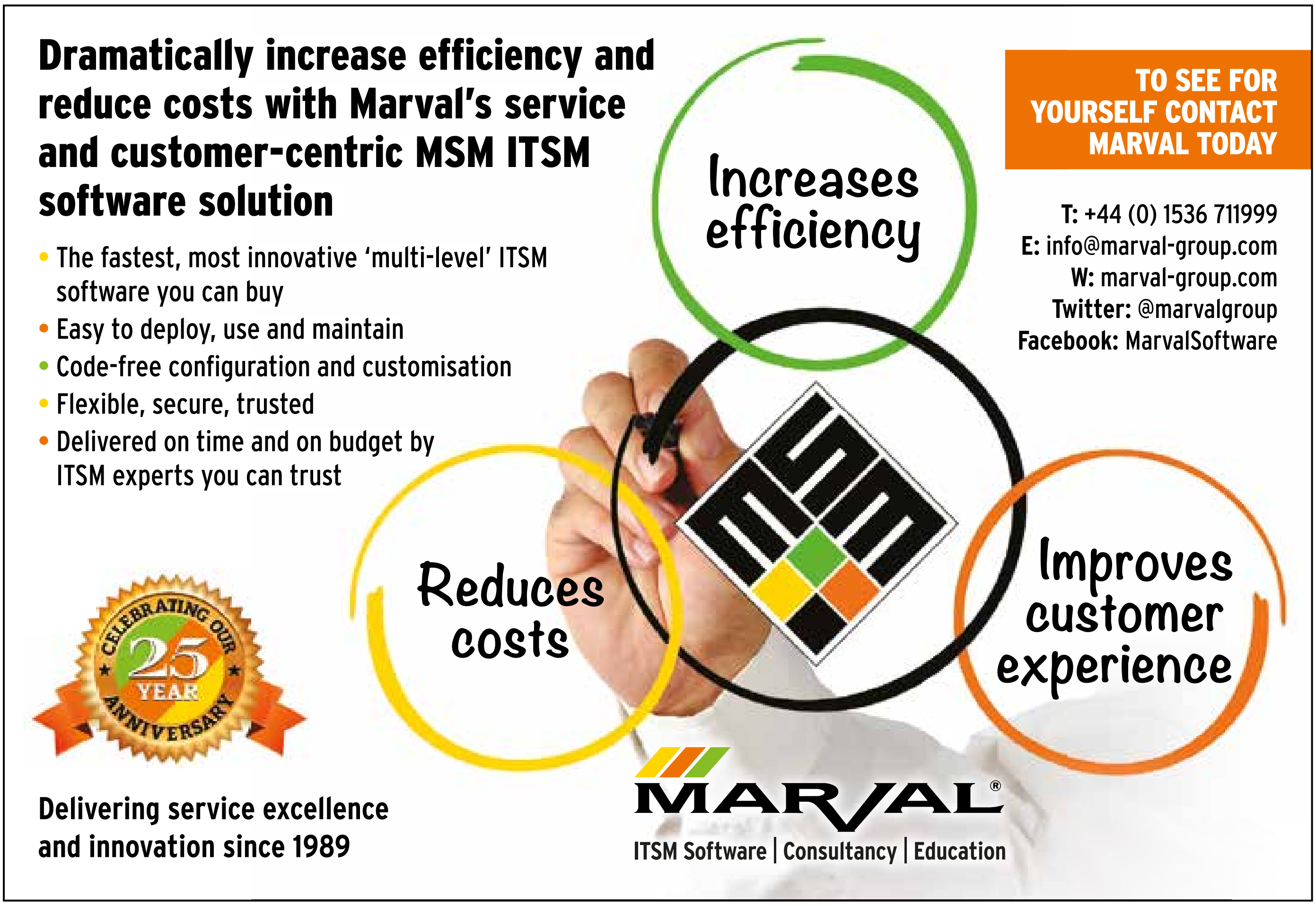
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Collaboration: what it means in the volunteer organisation

Using examples from IT Service Management Special Interest Groups (SIGs), Philippa Hale and Richard Horton consider the real benefits of collaboration and teamwork.

We live in a changing and complex world. Making sense of this and enabling our organisations to innovate and roll with – or even lead - the changes is a significant challenge. For people working in IT Service Management (ITSM), volunteer groups within ITSMF have played a key role in that sense making. Over many years these groups have enabled collaboration between people in different organisations to improve general understanding and practice, and they have also facilitated collaboration between the organisations themselves.

In this article we look at some of the challenges involved in that within-team and cross-organisational collaboration and propose some ideas for consideration. We combine Philippa's expertise in organisational behaviour with Richard's knowledge of ITSMF UK group operation.

Communities of practice

'Community of practice', a phrase introduced to the business environment in 1991 by Jean Lave and Etienne Wenger, has gained widespread currency. It describes a group of people who have a common interest in a specific area and explores how they work together and what the impact of the community is. There is a commitment to work together within the area of interest (across a community that could be widespread), sharing resources and learning/achieving together.

Within an ITSMF context, SIGs are the obvious communities of practice, but there is also a sense that ITSMF itself fits this description, whether at a local or international level. This is also true of many other organisations in the IT and digital environments, and their SIGs.

The motivations behind volunteer groups

What is it that makes people want to give up many hours of their time and engage with SIGs? These are voluntary communities, unpaid, often remote and where any 'management' or 'controls' does not have the same force as within a hierarchical organisation. However this doesn't mean they are not organised. On the contrary, these are not just debating societies or social networking gatherings. Many SIGs in the digital community work on what by any standards are complex projects, needing sustained effort over months, even years, with multiple and diverse stakeholders who are passionate about their subject, otherwise

they wouldn't be there as they probably have demanding day-jobs and personal commitments. What motivates participants in these communities to give so much of their physical and emotional energy?

Motivation 'Operating System Version 2.0'

For a long time we have relied on the old fashioned, externally driven 'carrot and stick' approach to motivation; the type that Daniel Pink refers to in his practical and thought-provoking book Drive as motivational 'Operating System Version 2.0'. This is the old 'management' model with its roots back in the 1900s – Taylor's 'scientific management', still used by the majority of organisations today in one form or another. Do you recognise any of this? Pay-for-performance, targets, policies, procedures, processes, quarterly (short-term) returns, metrics and measurement... These are based on beliefs about human motivation that, for example, still stop managers trusting people to work from home, to find their own solutions to problems, find out for themselves how to improve processes, lead a project or handle a customer, rather than being given a script and monitored endlessly.

What is now known is that many of these practices actually back-fire. Money, rewards or sanctions might act like a short-term 'caffeine hit' but actually reduce rather than increase motivation in the longer term.

It is very clear to anyone who has worked in the voluntary sector that this approach won't work, just as it doesn't actually work in commercial organisations. It can even be seriously counter-productive, encouraging people to focus on entirely the wrong things. You only have to recall the range and strength of distracting emotions and wasted energy at performance appraisal time. We want team working and collaboration? What do we do? Reward individual performance... and classify!

Other symptoms of inappropriate use of sticks and carrots include teams that are change weary or fragmented, changes made to tight deadlines then not quite embedded, processes and hierarchies bypassed so personal or short-term objectives can be achieved, all at the expense of longer-term improvements and business benefits.

These are perfect examples of predictable reactions to situations where the wrong tools and solutions were used to motivate people. A radical rethink is needed, and we are starting to see some changes in the way that people are motivated, not just in the creative industries but also in the big consultancies: Accenture abandoning their appraisal scheme, and others getting rid of the 'billable hour' and giving teams much more autonomy. Why?

Because they have recognised the power of organising work so that it doesn't rely on outside extrinsic push but inspires intrinsic, internally driven motivation. This type of motivation leads to sustained improved performance, enjoyment, retention, loyalty, team work, collaboration and work/life balance. This is what Daniel Pink calls 'Version 3.0'.

This is the sort of motivation where you see individuals and groups operating in a state of what is often called 'flow': optimum physical, mental and emotional energy, focus and creativity that feels amazing and moves mountains.

We see a lot of this energy and 'flow' in voluntary organisations: groups and individuals working all hours to produce extraordinary results - relishing the challenge, even when the going gets tough. This type of motivation is actually quite fragile, though, and needs the right type of environment and leadership to take hold and flourish. This is our challenge: to create the right environment for sustained voluntary collaboration.

What makes volunteer groups work?

What's the recipe for good volunteer activity? Or is it unique to each situation what turns a group of people into a community of practice? Here are some initial thoughts that may be useful for both volunteer groups and for our organisational roles.

Authentic and fairly strong, collaborative leadership

We want an initiator, to get things going and keep things going when the going gets tough; who can make tough decisions but is not a bulldozer. We want someone we believe in, who is doing this for the right reasons and quickly gets whole teams involved.

Clear vision

There should be a thought-through vision – well socialised, debated and shared. This should be presented initially with a degree of humility and openness to shaping and adapting, and finessing the language and metaphors to give a sense of shared ownership and meaning.

How we work

Clarity around proposed ways of working also helps, clearly articulated and regularly checked and reviewed together. Talk about how you are doing things, not just what you are doing. Being explicit about the simple things is essential, especially when members are from different cultures – organisational, professional or national. How we contribute, who we feel safe challenging and how we actually do it gradually emerges and is consolidated, then on-going dialogue ensures the practices don't solidify into 'group think'.

Honest debate

Talk through the risks and opportunities, costs and benefits for all involved: not just at the start, but on an on-going basis. For example, some of the contributors could see themselves partly or wholly as competitors. Be realistic about whether collaboration is compatible with this or not and accept others' sensitivities. They may have constraints or pressures you don't understand or know about, as may you.

Trust

Group members need to want to build trust and be willing, mature and confident enough to make what may actually be a considerable transition – from 'us and them' to 'us'. Being able to spot in-group and out-group thinking ('cliques' or 'silos') and actually work towards integrating rather than dividing people is a rare and essential leadership skill in any situation, but it is key to volunteer groups as people don't have to stay and put up with it.

Passion

Volunteers are passionate by definition. Multiple stakeholder passions mean vigorous debates. Can we handle this and ensure all parties feel their views are heard and respected? Good meeting facilitation is key, but all share responsibility for being both passionate and pragmatic.

Roles

What is the role of each participant? An article by Henna Inam (referenced below) tells of a CEO who worked on a volunteer project and learned "more in 1 year than I had in 20 in the corporate world". She gives some great advice on how to ensure that your job in the group involves you where you can contribute most: it is essential to discuss honestly where each member feels they will add best value and where, frankly, they would be dangerous! This contributes to quality relationships. We often don't realise that, in the workplace, what we interpret as 'personality clashes' are actually role misalignments. In the workplace there are many different motivations for taking on roles that we aren't suited to – such as technical people taking management roles because that is the only route up the ladder, and to higher pay.

Wenger (1992) identifies that accountability from the type of peer to peer relationships that communities of practice build can be a strong influence. This accountability informs setting appropriate ways of working and adherence to them.

Failure/learning

Henna Inam also talks about accepting that "failure happens so don't blame, don't shame, just grow". The whole group needs to work continuously at maintaining a culture of allowing people to make mistakes. This is often encouraged through the language that the group uses: 'why don't we try' rather than 'should, ought, must ...' Also, the leader needs to role model calling people assertively and respectfully if unhelpful language or attitudes emerge. More people leave volunteer groups – and day jobs – because they got

Looking back 20 years after proposing Communities of Practice, Wenger commented:

> "In organizations in the private and public sectors, communities of practice have provided a vehicle for peer-to-peer learning among practitioners. It enables them to develop the portfolio of capabilities necessary for the organization to achieve its mission. Communities of practice have always been there, of course. But having the concept makes the process discussable and then potentially more intentional."

This is a good description of how conscious engagement with SIGs is a key component to how ITSMF UK creates value for its members.

no feedback than because the feedback was delivered inappropriately.

Commitment

The reality check on commitment – our employing organisations come first, and family even more so. So the volunteer team needs to ensure back-up and mutual support so that no-one is put in an impossible situation. Respect that people will contribute what they can, and they will. Volunteer groups often attract – and may be led by – very driven people who don't understand that other people are not as driven as they are. Lots of people doing small tasks can work fine, but recognise the implications for timescales of the constraints you are working under. There is often a real tension here – between what the volunteer group needs to achieve to make progress and what level of commitment can actually be made.

Ideas/resourcefulness

"If there isn't a financial budget for it, it won't get done." That's not how it works with volunteer groups, who often achieve what by corporate standards is impossible. With limited or no money, creativity and lateral thinking are needed from all, seizing opportunities and sharing ideas as they emerge, which can happen at any time, and come from anybody, not just at designated meetings and from senior committee members.

Individual benefits – what's in it for me?

That's not selfish, it's common sense. We are all too busy and have too many demands on us not to ask that question. We all want different things and volunteer for different reasons: contacts, learning, finding sales opportunities (perfectly acceptable if agreed and handled professionally and respectfully), interesting projects where we can make a specific contribution, knowledge sharing, feeling part of a community when your job is relatively solitary, self-development… We will all be continually evaluating the pros and cons of participating and these will change all the time, depending on what else we have going on at work and at home.

What's in it for my organisation?

As with individual contributions, if it's all take and no give then things won't go far. Members of the group need to think about how they demonstrate return on investment (ROI) of any work time they give to the group (particularly if their organisation operates System 2.0!) This may be learning to make persuasive presentations, or gaining project management experience, or volunteering for a group which focuses on a topic known to be of interest to your organisation.

Physical or virtual

Many groups within volunteer organisations like ITSMF UK are virtual, and this is to an extent inevitable. But while technology increasingly enables virtual meetings, people still value meeting physically. Find the right mix that enables the most productive working relationships and most effective collaboration, without putting too much pressure on specific people. For example, be prepared to adjust meetings to times that fit with specific time-zones or the profile of people's working day, moving locations where necessary and using technology to help.

Easy to use collaboration tools

We are very quick not to bother if the tools we use are clunky, slow or duplicate effort or if we can't find things. We need to find collaboration tools that reflect the way we want to work and help to maximise the use of our shared time and contributions.

And finally - persevere with collaboration!

Effective collaboration and sustaining a true community of practice is something that requires a lot of work. It doesn't generally happen overnight or achieve its best results quickly. So why do people invest as they do?

Probably because, while in the corporate world we think we don't have time for collaboration (and the sticks and carrots get in the way – Motivation 2.0!), volunteers see things differently. They know that solutions to problems and knowledge don't sit in neatly self-contained bubbles. Through collaboration we are more likely to come up with innovative solutions to our (and our industries') challenges. Working with others who are grappling with the same problems gives us multiple inputs, builds important interpersonal and leadership skills, provides multiple perspectives to understand and address these challenges faster and more creatively.

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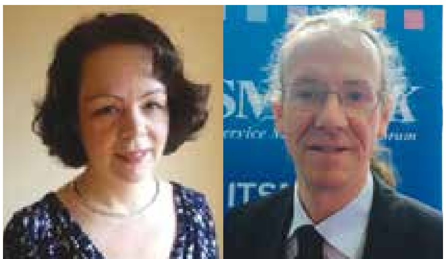

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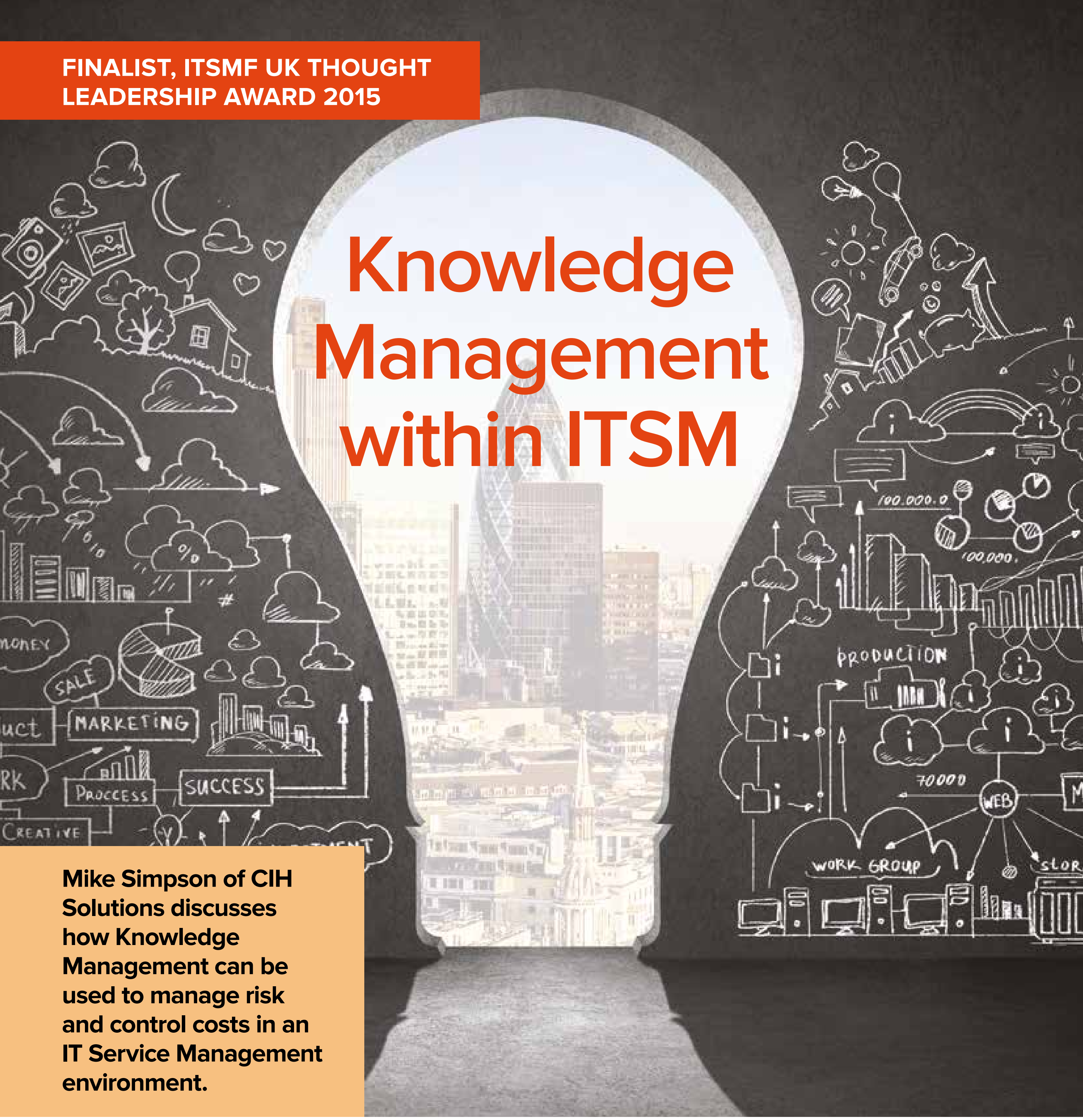

Knowledge Management within ITSM

Mike Simpson of CIH Solutions discusses how Knowledge Management can be used to manage risk and control costs in an IT Service Management environment.

As with most terms found in IT, Knowledge Management means different things to different people. Indeed, it is often used interchangeably with other phrases such as intellectual capital, information management, data management and document management. In reality, KM embraces all of these.

So, what is my definition of KM in relation to an ITSM organisation?

- First, this is not about scale. A KM system can operate just as effectively in a small organisation as a large enterprise. The principles remain the same – identifying, collating, storing and retrieving knowledge for use by all personnel in their day-to-day tasks. Also, this is not just about documents and data. When the experience of personnel is added into the mix we get Knowledge and this needs to be captured and stored for future use.
- Second, from my experience the key feature of a KM system within an ITSM organisation is understanding that different information has different values depending on circumstances. For me assigning value to information is vital and has priority over the capture of all available material. At this point I should add that I do not differentiate between an MSP serving external clients and an internal IT service provider. The same KM principles apply. Also, the KM system described in this article should be considered a 'practical solution' that can be implemented with limited resources and budget and extended over time.

I want to begin by briefly describing two KM systems that I have encountered in the course of my consultancy work.

Example one

I've seen only one truly outstanding example of an enterprise wide KM system and that was at a European pharmaceutical company. What struck me about this KM system was the sheer scale of the repository containing research papers, trials results and project documents covering decades of research amounting to many millions of pages and database entries. The success of this KM system was of course the strength of the underlying thesaurus that enabled scientists to discover (or perhaps re-discover) knowledge to support the design of a new R&D programme.

Example two

My second example is at the other end of the scale. This is a local KM system that supports an IT organisation that provides hosting support for external SAP clients. This KM system also impressed me but for a different reason. Without any real top-down sponsorship or funding the technical teams had created their own KM system based on a single central repository, but where all the content was created, published and maintained under very strict guidelines by a few key members of staff, but accessed by many. The rationale for using this approach was to bring discipline to the management of documents and data that were considered vital to the successful running of their IT organisation.

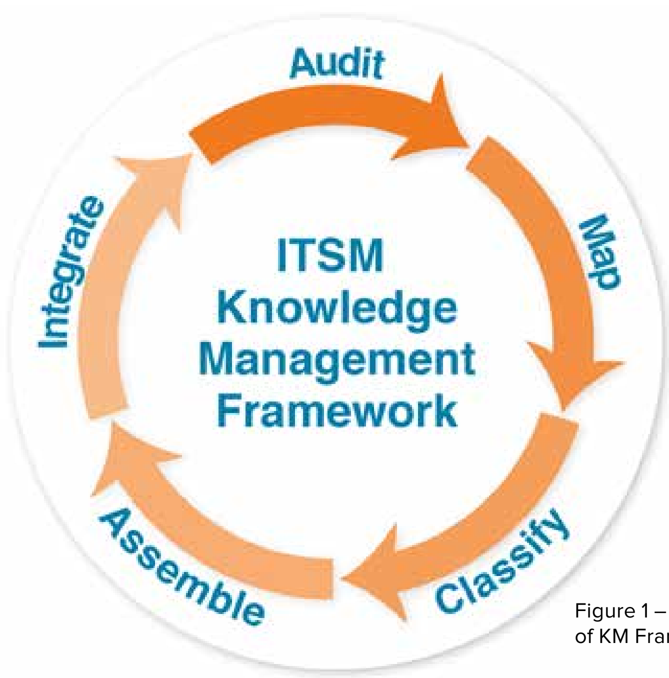

Figure 1 – Five stages of KM Framework

KM Model for ITSM

The rationale for the second example above sounds somewhat obvious, but the background problem as explained to me was one of long term ill-discipline in the day-to-day management of key information. Individuals, both staff and sub-contractors, would create multiple documents, held in isolated repositories or held on local drives, resulting in poor retrieval and inaccurate information.

The problem is a familiar one. Admittedly, this KM system is basically document management, plus some other information formats and a simple data classification system, but in my view this doesn't matter as the problem of badly managed information was controlled by introducing a strong KM framework with a central repository to address a specific local need.

It is this model of KM that I want to discuss as the starting point for KM for ITSM, but first I need to say something about the concept of assigning value to information.

Defining business value

I mentioned above that assigning value to information is vital.

I call this category High Business Value information. So, what does it mean exactly? Essentially, this is a category of business information that covers all the vital and irreplaceable business records, documents, information and data that are associated with sensitive areas like customer data, compliance, security, personnel, finance and legal and commercial activities. It is this category that has the potential to damage an ITSM organisation should this material be compromised by loss, breach of security, inaccuracy or the inability to locate and retrieve quickly when needed. It is the failure to identify, capture, publish and retrieve this category of knowledge that can have a significant impact on the management of risk and cost control.

Whilst all information is valuable, depending on circumstances, some information suddenly becomes more valuable.

KM Framework

Our first step is to build a KM Framework. This framework must define the KM life cycle to create, capture, review, release, amend, publish and retire content. In addition, the KM Framework must define a system of classification for the ITSM information. We have already identified a need to segregate high value information – I'm calling this Layer 1 information. All the remainder of the ITSM information and data is collected into Layer 2.

Basically, for Layer 1 we know what we want and where it is – hence we can find it quickly using a hierarchy with a controlled vocabulary where everything is tagged.

However, for Layer 2 the structure is more linear using a Thesaurus and non-controlled vocabulary. This allows for a more 'search and discover' approach.

Finally, the framework will identify the ITSM knowledge managers who will be responsible for implementing the framework, plus a KM steering committee.

Five stages of the KM Framework

There are five stages within the KM Framework and these are shown in Figure 1. By following this five-stage sequence all the information considered as high business value can be identified and either uploaded into the KM database or retained in local repositories (known as source databases).

This is the Integrate stage that is covered in detail later on under the Hot Spot scenarios. Each stage should be followed for Layer 1 and then repeated for Layer 2.

- Audit – once the categories within Layer 1 have been identified, all the material to be included in each category needs to be identified. The audit will do this and will cover different media formats such as PDF, database tables, emails, webinars and HTML.
- Map – during the audit the location of the material is identified. This is mapping and will be needed when the KM database is designed and built to identify what material should be transferred to the KMDB and what material should remain in local repositories.
- Classify – once all the information has been identified for the categories of Layer 1, the documents and data can be classified according to the controlled vocabulary system and the hierarchy structure.
- Assemble – once classified and physically located, the content for each category should be assembled as a schedule of descriptive metadata tables complete with information titles, document numbers, versions, data sets and physical location.
- Integrate – once all the information has been assembled the metadata tables can be used to manage the population of the KMDB – either directly with content or connected to other repositories to extract the content. These are known as source databases.

Classification

As mentioned above, it is important to classify by value as well as classify by subject. For example, all customer data should always be considered high value, but the exact list will

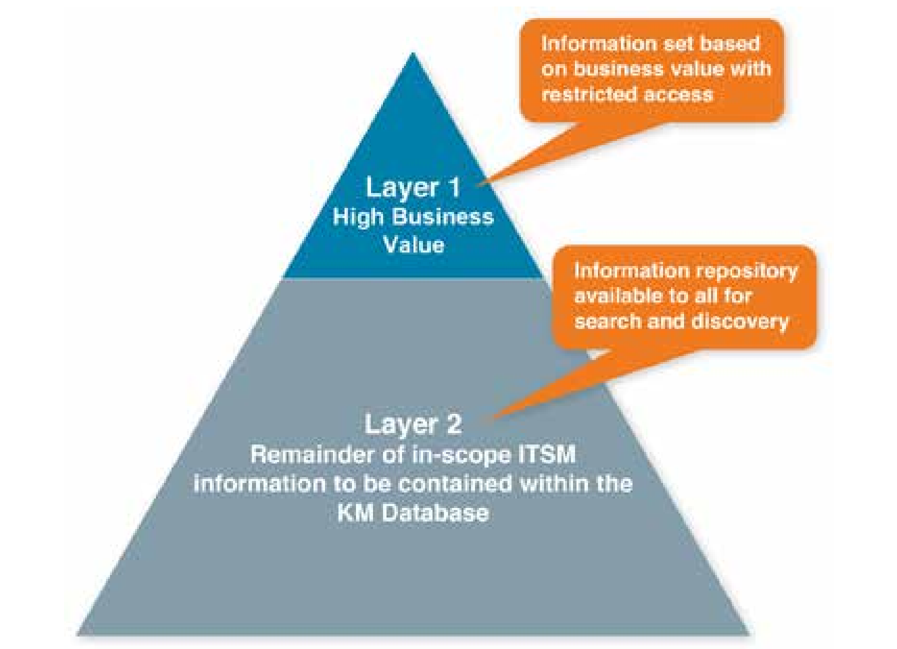

Figure 2 – Grouping Information by layers

depend on the types of client and services that are supported by the ITSM organisation.

When it comes to the subject of classification there are many standards1 on taxonomy and debates about linear versus the hierarchy structure approach. I'm therefore suggesting that it makes sense to divide our total ITSM information into two distinct groups – the high business value information already discussed and a second group which is essentially everything else. I'm calling the first grouping Layer 1 and the second grouping Layer 2. Once all the information has been divided into these two layers we must structure the information in two different ways. Figure 2 shows this division.

Layer 1 should be structured using a taxonomy with a hierarchy and controlled vocabulary. This scheme will identify the information according to importance, sensitivity and security level, and will be used to control access to the information in Layer 1. The search tools that underpin our KM system will then be able to locate and retrieve any of the information in Layer 1 very quickly. Layer 1 will typically have the lowest volume.

For our second layer – Layer 2 - I suggest a thesaurus with a more linear structure that will allow a flexible form of search and retrieval based on a smaller number of the terms.

Not everything needs to be tagged in Layer 2; instead broader searches and cross searches can be adopted to allow a 'search and discovery' approach, even looking inside some documents and files to locate content of interest.

This makes sense as the population of Layer 2 will cover all manner of archived project material, design documentation, presentations, and non-critical business records. Layer 2 will typically have the highest volume.

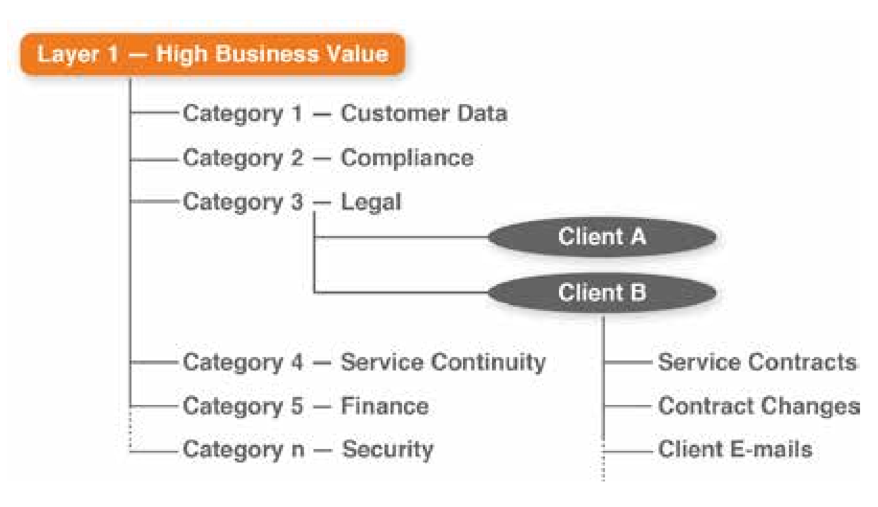

Figure 3 – Classification hierarchy

Hierarchy of Layer 1

Given the relatively simple structure of our KM system, I suggest a top down approach for Layer 1, based on a hierarchy of categories and sub-categories using a controlled vocabulary to tag documents and datasets. An example is shown in Figure 3. As Layer 1 is the primary focus of our initial KM design and build, it's not my intention to outline the structure of Layer 2.

Once all the constituents of Layer 1 have been identified during our Audit stage, all the information and data can be divided into categories. These categories will be assembled under various functional headings, for example:

- Category 1 – Customer data
- Category 2 – Compliance
- Category 3 – Legal
- Category 4 – Service continuity
- Category 5 – Finance
- Category n – Security

Once all the categories have been identified, the material should be further sub-divided into sub-categories. I would suggest that these three drill-downs are sufficient to hold all the information in Layer 1. The Sub-categories will contain all the specific document and datasets that relate to a particular category, and this can be assigned by client or customer type or by any other specific grouping.

This hierarchy is not meant to be in any way prescriptive, just to offer examples of categories and sub-categories.

Example 'hot spots'

I've identified four possible 'hot spots' based on personal observations of real life events and these are shown in Figure 4. Clearly, there will be others depending on the set-up of a particular ITSM organisation and the types of client it supports.

The figure is based on a simplified ITSM organisation that could be either a MSP dedicated to external clients, or an ITSM organisation providing IT services to an internal client. The IT Operations can be either internal or external hosting with or without applications support. For the purpose of this article it is assumed that the IT Operations are in-house and provide hosting, communications and applications support - within an overall governance framework.

There are four example 'hot 'spots' shown in Figure 4:

- Client portal – risk to reputation due to poor quality of customer information

- Legal and commercial – cost of litigation due to incomplete contract audit trail
- Compliance – cost of compliance due to audit failure and forced re-work
- Service continuity – risk to IT service continuity due to inadequate preparation.

All of the above examples relate to the absence, inaccuracy or timely retrieval of information.

Risk to reputation (Hot Spot 1)

In this scenario I've created a simple Service Operation (SO) organisation that has responsibility for managing the information available to customers via a client portal. I should state at this point that not all of the information available through the portal is the responsibility of the SO team. Some material will be supplied direct from the client for uploading onto the portal – material from the marketing department such as prospectus and application forms.

The remainder of the material will be service and technical support information produced within SO and cover such topics as service availability status, technical self-help and how-to-do-it video clips. The client portal also has a secure area for the client customer groups to access data on performance against SLAs.

The 'risk' we are trying to mitigate here is out-of-date, missing and inaccurate information being posted to the client portal. The current arrangement within our SO is that information is currently held in separate repositories. Information is identified and collected and then manually or semi-automatically uploaded onto the client portal database using scripts. The risks here are that:

- not all information is collected at the right time (like monthly SLA data updates)
- incorrect information is selected for the right location
- correct information is uploaded to the wrong location
- not all information is collected.

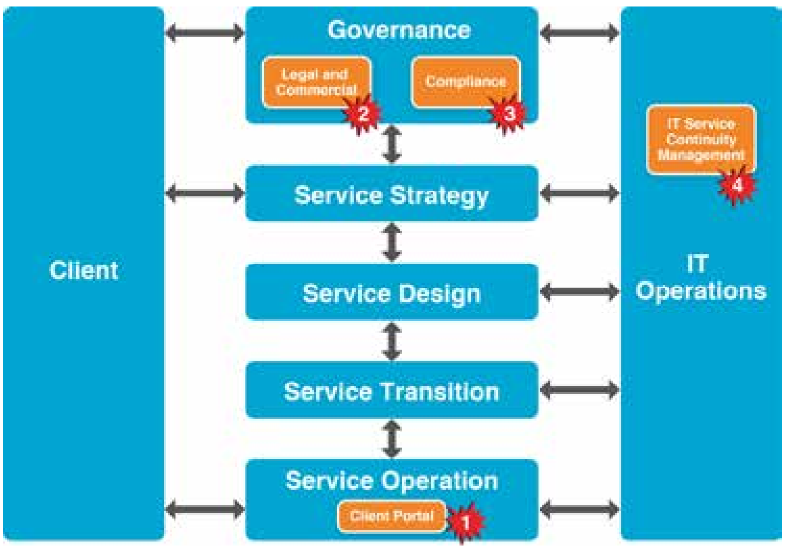

Figure 4 – Example Hot Spots

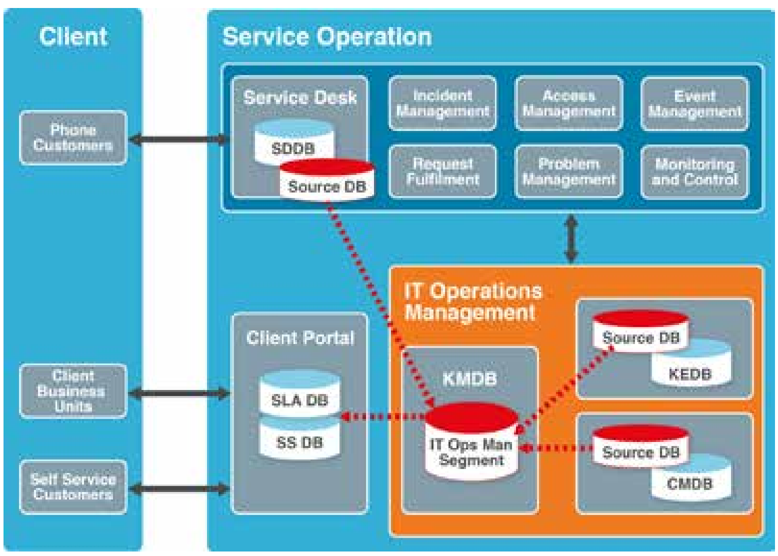

Figure 5 – KM integration of client portal information

All the above risks can be minimised by the correct processes and checks in place and rigorously enforced. However, experience has shown that this manual and semi-automatic process can break down over time and quality – and reputation – can be impacted.

All the client information that was previously managed manually has now been compiled into metadata tables from the Audit – Map – Classify – Assemble stages. We can now move to the Integrate stage. The metadata tables will hold the locations of all the information and data needed to be accessed by the client portal and the KMDB will use distributed queries to collect all the information and data from these locations. In practice these will be permitted areas within local repositories (or tool set databases) – known as source databases. See Figure 5.

For example, the Known Error Database (KEDB) could supply diagnostic help and work-arounds for self-service customers for the most common errors. The KEDB will also collect Event and Incident Management data in support of the SLA reporting that is provided to the client business units via the portal. The Configuration Management Database (CMDB) will be another source database for the supply of data to the client on service configuration.

Cost of litigation (Hot Spot 2)

My second scenario relates to the threat of litigation as a result of a breach of contract. Whilst this sounds dramatic, it is important not to underestimate the legal and commercial requirements to hold and maintain all contractual material and associated business records.

Most service-based agreements come with some form of service credit arrangement. However, a decrease in payment may not fully compensate a client for poor service particularly when a number of service failures occur in quick succession or a major outage lasting several days hits not just the client but the client's customers. Such a scenario could be considered a breach of contract resulting in litigation to seek damages and a termination of the service contract.

Any move to litigation will result in a demand from the client's legal team for all relevant information to be handed over. This is known as e-discovery2 and the Service Operation team along with the organisation's legal department will need to respond very quickly in a short time-frame.

This is another example of how the KMDB can be used to store high business value information. Figure 6 shows how the KMDB can contain a Legal DB segment that is used to store in one location all contractual and historical SLA information relating to an individual client. As with Scenario 1, the metadata tables will hold the locations of all the information and data needed to be accessed by the Legal KMDB segment.

Again, distributed queries are used to collect all the information and data from these source DB locations. The information will include all versions of contracts, contract amendments, and SLAs including email trails between the client and the IT service provider. This latter point of email capture is increasingly used to highlight any communication that might indicate an implied contract variation by either party. I would suggest the inclusion of a Message Record Management (MRM) system as part of the KM solution.

Also, it will be necessary to install an activity monitor to log and track activity of users of the KMDB segment. In reality, this would be good practice across all of the KMDB segments but essential in this instance.

One final point. Where the service provider is internal to an organisation, for example the public sector, the risk of litigation is negligible. However, be aware that a consistent under performance against SLA targets could be a fast track to IT outsourcing. I've seen this happen on a number of occasions. Although this is usually presented as an exercise in cost saving, invariably it is driven by a long-term dissatisfaction in the performance of the internal service provider.

Cost of compliance (Hot Spot 3)

Here is another example of the importance of a KM sub-set of material that can be assembled on the basis of a specific demand. During a compliance audit, ISO27001 for example, there will be a specific document set that needs to be made available to the auditors for the certification process.

Without a rigorous KM approach there is the risk of auditors finding a shortfall in the control objectives and controls. This will result in low auditor marking and possible non-compliance. There is now a real cost involved with the remedial work needed for a re-run of the audit, particularly with the high daily rates charged by external auditors.

The material can range from information security policies to physical and environmental security. There are many different types of information and data, and the Audit and Map stages of the KM Framework will require a lot of research and agreement from the KM stakeholders on what should be included in this KMDB Compliance segment. It is likely that some of the lower level information may be located in Layer 2. If this is the case then it might make sense to leave it where it is and simply connect between the two layers. It is also true that the scope of ISO270013 is such that the KM will need to connect to a wider range of tools and assets.

One particular example is software asset management (ISO 27001 - Clause A8: Asset Management). Under this heading auditors will check the number and validity of software contracts held and check that the licences cover all the users who actually use the software. This could be addressed by setting up a source DB within a SAM tool and extracting all the data needed for the audit (as a controlled set) and then sending it to the KMDB. This is actually a very common failure point.
Risk to Service Continuity (Hot Spot 4)
In this final scenario I want to look at how the KMDB can be used to support service continuity. This has a much broader scope than just KM and I'm not intending to cover the whole subject of Business Continuity Management (BCM). Again, there are multiple terms involved here, such as disaster recovery, business recovery and service recovery. In the case of ITSM and KM, I'm going to describe how KM can be used in support of service recovery within the broader BCM that covers the end-to-end business of a client.

The dilemma facing an ITSM organisation is no-one can really identify all the situations likely to occur. Certainly, the evacuation of a data centre due to fire and flood is an obvious scenario, but thankfully not one that occurs very often. Clearly you can't prepare for every instance but it is possible to target some common 'knowns'.

So here is a possible starting point. In our Layer 1 (High Business Value) under the Service Continuity category, the sub-categories should be constructed to reflect various 'threat scenarios' – one per subcategory, such as cyber threat, data theft and denial of service. We could also add major software outages that can and do occur from time to time.

Each 'threat scenario' can then be structured along the scope and guidelines of ISO 223014. This will create a consistent framework for compiling all the recovery procedures, communication escalations and fall back plans for each scenario. Clearly there is much more to discuss here, but that is the subject of a future article.

Conclusion

What this article attempts to describe is a number of possible solutions to common issues around both risk and cost control in an ITSM organisation. It is not intended to be prescriptive. The KM system described here should be considered an 'entry level' system, but with the capability to be extended as time and budget permit. This KM system is also predicated on content being held within existing repositories, as well as a central KMDB, but extracted on demand. The success of implementing a KM system will always reside with the management and staff of an ITSM organisation and not the technology. Hence the emphasis must always be on developing a KM Framework as the starting point.

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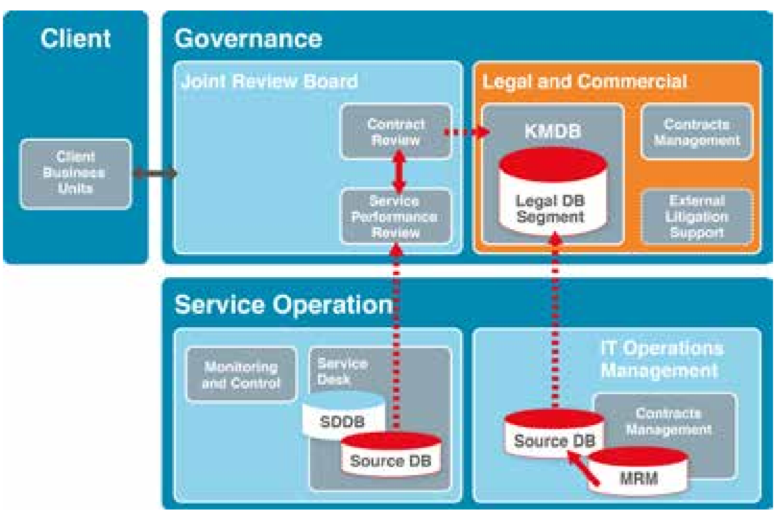

Figure 6 – KM integration of legal information

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itSMF UK

What is the ITSM Directory?

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What makes it different?

We are the only UK Directory specialising in IT Service Management, providing a top source of information on service providers, training organisations and suppliers for buyers in the industry.

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Developing new skills for the future

The latest ITSMF UK Midlands and East Anglia Regional meeting in September was hosted by the University of Northampton, with the over-arching theme of People and Skills. Chris Roberts reports.

The need to reassess our skills requirements is on everyone's agenda at the moment, and it was a fitting theme for the latest Midlands and East Anglia region event. Regional chair David Backham had pulled together an interesting and diverse range of topics, with presentations and workshops covering various aspects of the skills agenda.

New skills for tomorrow's professionals

After the usual introductions and updates, Sandra Whittleston from the University of Northampton gave a presentation entitled 'New routes to skills development in the UK'. This looked in some detail at ITSM and the skills agenda, education (including CPD) and future opportunities. The session reviewed the challenges around the current IT skills shortage and its effect on the economy and on business effectiveness, amid a growing reliance on computer-based technologies and the need for speed to market. The changing technology landscape was described with its complex supply chain, ever larger volumes of data and greater mobility of end users.

From the academic perspective, today's students need to enter the job market with some business acumen and a focus on service as well as technology. At the moment many universities still have separate business and computing courses, with computing still being largely code-based. This is not helped by the fact that the universities' computing courses are based on a requirements specification written in 2007, whereas the business students are utilising a more current 2015 version. For too many students, service management remains an unknown quantity until they reach the workplace; it would be much better, Sandra Whittleston argued, to get them involved in ITSM early in their studies, with greater opportunities for work placement and internships.

In conclusion, it was suggested that the most valuable areas of study for IT/business students preparing for the jobs market should include ITSM frameworks, service and business concepts, logistics and supply chain management.

As a separate element Sandra Whittleston announced that a strategic partnership between the University of Northampton and Fujitsu Services had been signed just before the event. This would include the opportunity for student site visits to Fujitsu's Stevenage facility, as well as mentoring and guest speakers and student project work and research for second-year business and IT students.

SFIA – the next steps

After a brief break for refreshments, we had an excellent presentation on 'SFIA – using job roles', by Matthew Burrows of BSMimpact on behalf of the SFIA Foundation, outlining some significant developments in the recently launched SFIA version 6 (June 2015).

Version 6 of SFIA – Skills Framework for the Information Age – has 97 skills all with 7 levels of responsibility, with six categories and sub categories. It is currently used in 200 countries to help develop role profiles and job descriptions, identify education and training needs and support the recruitment process for professionals in IT-related functions.

Each individual level/category has a detailed description, used by both HR professionals and employees to assist in their career development. SFIA tools have been developed for self-assessment and to help interviewers to assess and validate a candidate's capabilities.

The new skills added in v6 included Digital Forensics and Penetration Testing. Some organisations are using the framework on a corporate level to identify which skills are in short supply or completely absent; from there they can begin to determine whether the skills are genuinely missing from the workforce or whether staff already have those skills from a previous employment (but unused in their current role).

Major SFIA users include the Australian Government, US Navy and Disney Corporation, and support for the framework is increasing across AsiaPac as well as Europe and the USA.

After his presentation, Matthew Burrows invited each delegate over the lunch break to do a self-assessment of their skills and competency levels using v6. It was suggested that each delegate choose one or two competencies and score them against the key criteria of Autonomy, Influence, Complexity and Business Skills.

Reports from the Masters

The next item on the day's agenda was a Skype link-up with former MSc in Service Management students, based in UK and Europe. This was a very interesting session with each past student given five minutes to discuss and answer questions about how they are now using the skills and benefits of the MSc course.

- Daniel Mangani (Analyst, Malta Government) found that the degree helped him in his research work, and in understanding problem management.
- Alex Cartlidge (Asset Inventory Process Manager at the European Central Bank) talked about the help that his studies provided in developing business presentations and using ITSM tools. On a day to basis he now uses these skills for gap analysis of software services.
- For Aminu Seidu (Network Engineer at University of Northampton) the degree gave him the confidence to give business presentations and get to grips with the ITIL 'lingo'.

The rise of CPD

David Backham then gave a brief background presentation about Continual Professional Development (CPD), starting with a history of work and the evolution through the ages of the concept of careers. From here he discussed the need for lifelong learning and adapting, and where CPD can help your development and improve productivity. He referenced a University of Warwick study on career progression models, with its four types – Evaluative, Strategic, Aspirational and Opportunistic.

David's introduction segued smoothly into the final session of the day, a presentation from John Tomlinson on the recently launched AXELOS Professional Development Programme, which started appropriately with a quote from Newton D. Baker: *"The person who graduates today and stops learning tomorrow is uneducated the day after."*

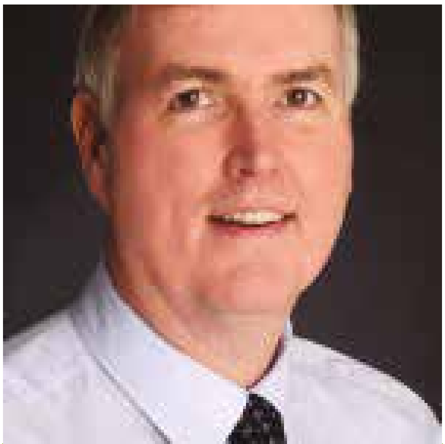
The AXELOS programme uses a skills framework for reference and a CPD model to assess and plan learning and development and show ongoing activity.

The AXELOS Skills Framework covers both ITIL and PRINCE2, referencing the European e-Competence Framework (e-CF) v3 and ICB3 Framework from the IPMA. Whilst the SFIA framework is more comprehensive, as it covers many more skills, the AXELOS framework is nonetheless ideally suited for professionals assessing their ITIL and PRINCE2 competencies.

The AXELOS CPD model is based on a Plan, Do, Check, Act continual improvement cycle (the outer ring), where an individual will perform a self-assessment and determine their training needs, acquire the identified skills and then assess their successful acquisition. CPD is accumulated in four main areas: Professional Experience, Training, Community Participation and Self Study.

The programme's requirement is for an individual to acquire 20 points each year to demonstrate their commitment to CPD. This achievement is linked to the award of a digital badge, a set of metadata that an individual can present to an employer.

Wrapping up the event, David Backham thanked the delegates for attending and getting involved and in particular Sandra Whittleston for hosting the event and supplying the tasty refreshments.



Chris Roberts is principal of WiderViewPR.co.uk and an experienced communications and imaging professional

The AXELOS CPD model

The AXELOS Skills Framework

Revisiting capacity planning

Stuart Higgins reports on the results of a recent survey among ITSMF UK members, which underlines the importance of capacity management in meeting corporate availability and strategic marketing objectives.

The IT industry is heading for significant growth in 2016, with the pace of technological change continuing to intensify and an ever increasing deluge of data. As organisations look for ways to transform their ITSM capabilities to deliver against ever-increasing service level expectations in this landscape, capacity planning is re-emerging as an important tool.

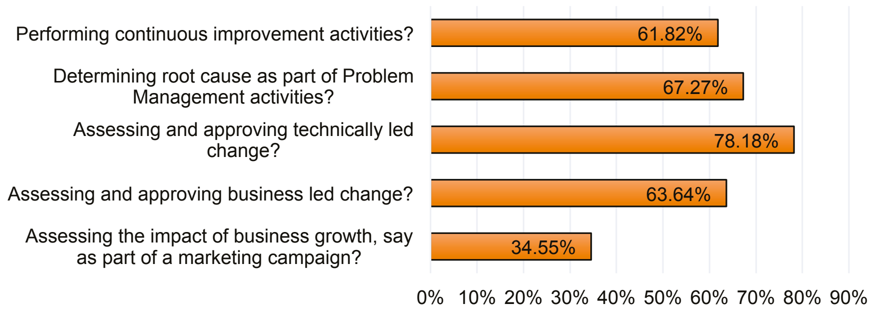
To provide us with a sense check on the changing role of capacity planning in the IT service management landscape and to help us fully understand how organisations are using this discipline today, Sumerian recently worked with ITSMF UK to conduct some research amongst its members.

The ITSMF survey complements research undertaken with Populus during August and September to uncover the key trends shaping the current and future capacity planning landscape and attitudes towards IT capacity planning within large enterprises. Within the Populus survey, the overriding conclusion was that many organisations are still not placing capacity planning high enough on their agendas and as a result are planning for IT change blindfolded.

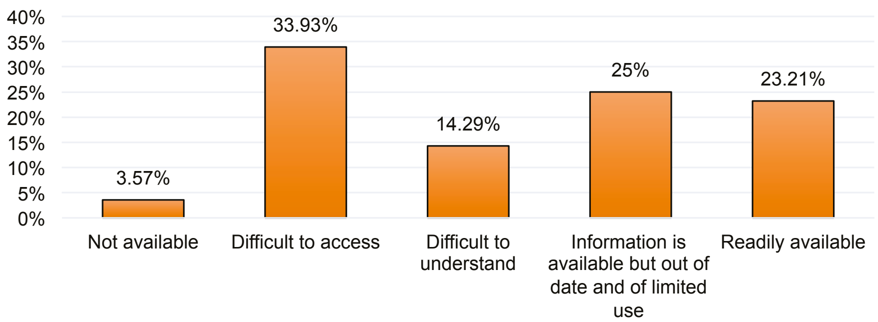
For example, of the 94% planning an upcoming change to their IT infrastructure in the next 12 months, 34% admit they find it difficult accessing the necessary capacity data required to support major IT changes and reduce their risk exposure. As a result, UK enterprises are putting their IT service capability at significant risk, with 29% acknowledging that capacity issues still account for a sizable proportion of their critical outages.

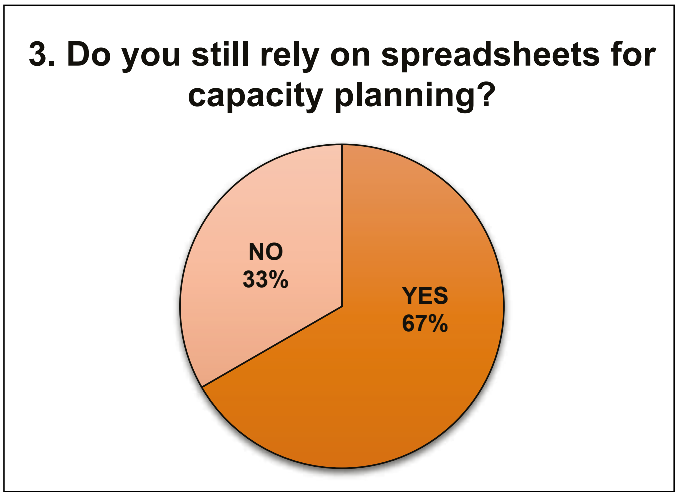
The ITSMF survey supports these findings, and of the five questions that were put to itSMF members, the answers identify some compelling trends.

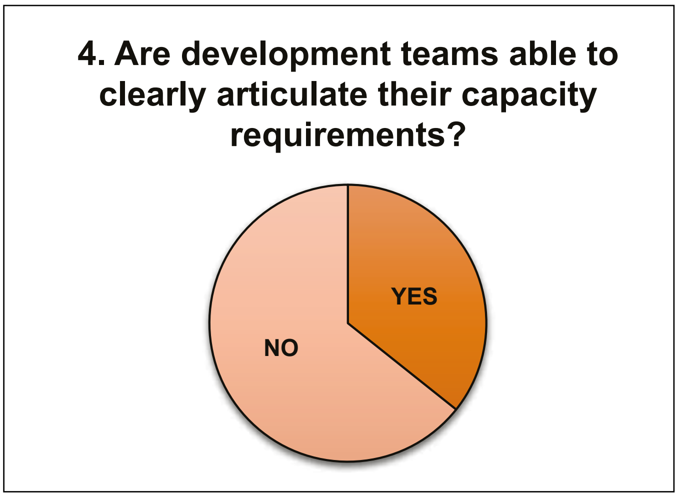
1. In your role, do you refer to capacity management information when... (choose all that apply)

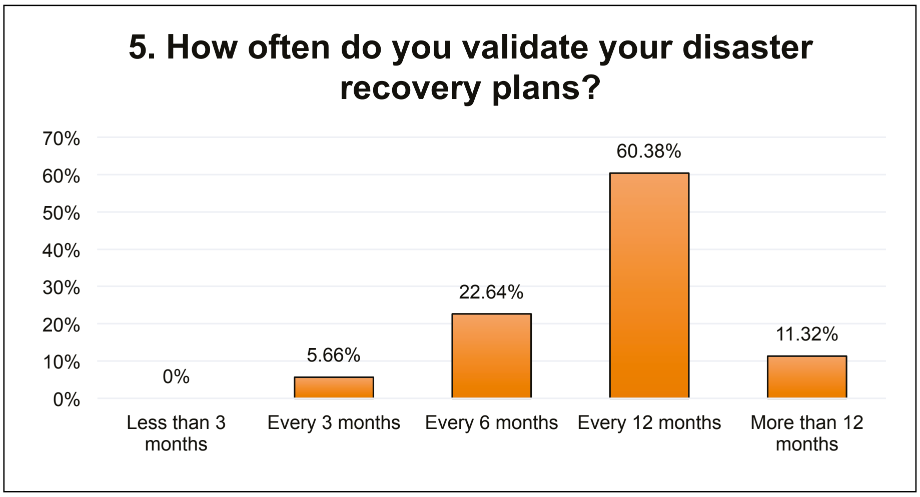


2. Which of these best describes your organisation's ability to deliver easy to understand, up-to-date capacity information?









The results here show there is a clear and established role for capacity management insight to support major change initiatives, and so reduce risk exposure.

At 67 per cent, identifying the root cause of capacity problems was cited as the second most common application of capacity management information, signifying that the majority of organisations are encountering capacity related issues, and addressing them reactively. This is something we see all too often, with many businesses still seeing capacity management as a largely reactive rather than proactive discipline.

Having easily accessible information that is straightforward and intuitive to use dramatically improves its applicability and usefulness. The survey results clearly show, however, that accessibility to good quality capacity information remains a huge barrier. With less than a quarter of respondents noting that their organisations are able to deliver easy to understand and up-to-date capacity information, that leaves over 75% having to rely on information that is either out-of-date, difficult to access or difficult for them to understand.

One of the standout results from the survey is that two thirds of organisations still rely on spreadsheets to carry out their capacity planning activities. Using spreadsheets for capacity planning involves a lot of time and energy, and leaves a wide margin for human error.

While spreadsheets have a very special place in the history of capacity planning and offer huge flexibility, given the complexity of today's IT environments and the new tools and technologies now available, they really belong to a by-gone era. Large organisations with high availability requirements in particular need to adapt quickly to minimise risk and plan for business continuity. An outage could mean anything from bad press to millions in lost revenue and disappointed and frustrated customers. This dependence on spreadsheets is certainly a cause for concern, and we expect to see this ratio decrease over the coming year as more organisations move to adopt the latest capacity planning techniques and tools.

Having the information to hand is one thing. Being able to understand, communicate and apply it in a successful and beneficial way is a completely different story. The survey found that almost two thirds of organisations' IT development teams are unable to clearly articulate their capacity requirements. As the crossover between IT and marketing continues to gain pace, clear communication between teams and team members is vital if an organisation is to successfully transform or maintain its IT landscape, and ensure that its infrastructure is able to cope with the inevitable peaks and troughs in demand.

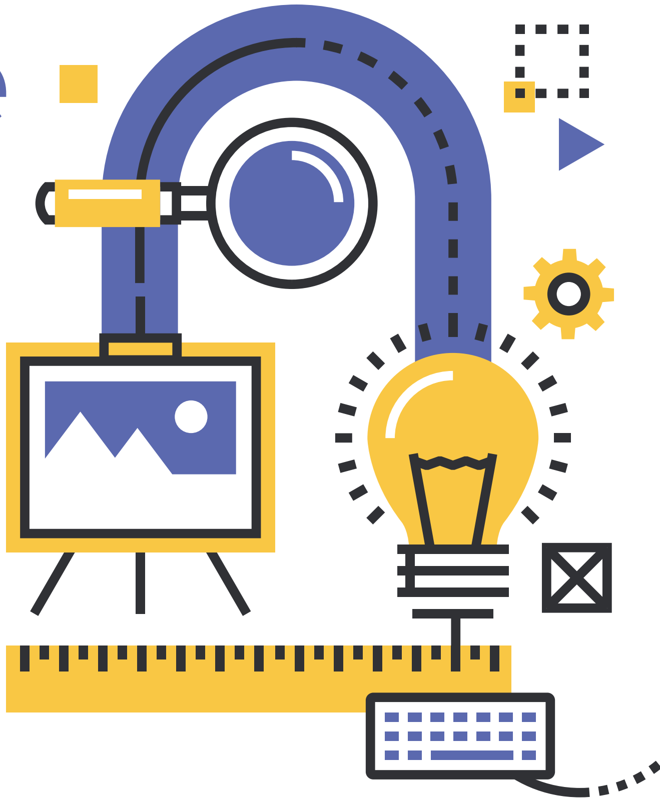
Proper capacity management and planning, combined with clarity of communication, can allow a business to truly work back from the customer experience, and ensure that its IT infrastructure can cope with the ongoing changes made from a business perspective. It will ensure the efficient alignment of IT resources to meet the needs of the Chief Marketing Officer (CMO) and at the same time deliver the transparency and understanding for the CIO and CMO to successfully realise their joint ambitions.

All IT managers at large organisations must have a Disaster Recovery (DR) plan in place, and generally they do. But with the fast-paced nature of technological evolution, the typical corporate IT infrastructure is constantly changing. When it comes to DR, the majority of organisations in the survey review their DR plans once every 12 months. At 60 per cent, this traditional cycle can catch some organisations out. On the other hand, with almost 30 per cent reviewing their DR plans every half-year or more frequently, this is a positive sign that organisations are taking the potential for capacity outages seriously. Overall, both our research studies reaffirmed what we already suspected; that many organisations still have a way to go in establishing and maturing an effective capacity management capability. To meet ever increasing expectations from the business, capacity planning needs to re-emerge as a key priority for 2016, and its value should not be underestimated.

Stuart Higgins is Technical Evangelist at capacity management specialists Sumerian

Please release me, let me go!

To waste… would be a sin



Jon Morley and Rob Spencer describe ITSMF UK's first Release Management masterclass, which they facilitated in September.

With 16 delegates from across the country – representing a wide array of public and private sector organisations – we knew that there would be a broad range of views and perspectives at our first Masterclass. The event blended breakout sessions, the occasional bit of theory and a lot of experience to help answer numerous release-related questions.

Usually, Masterclasses involve very specific delegate scenarios; however since the requested range of topics was quite broad, the day was based around 'Dagen H' – the day that Sweden moved from the left to the right side of the road in 1967 – to see if release management could help. Fittingly, the song quoted in the title of our article was also released as a cover version by Engelbert Humperdinck the same year.

Changing sides of the road might seem an inane subject to tackle, particularly for ITSM practitioners, but we purposefully chose a subject not typically associated with IT release management to break delegates – and their facilitators – out of their comfort zones.

Very quickly we all spotted themes of commonality between deploying IT systems and deploying other resources like road signs and GPS map updates – yes, we agreed that GPS existed in 1967!

Going back to the broad range of topics, we would like to share with you some of the learnings we took from the day that may help you on your release management journey.

1. Keep it simple

There are only so many ways of getting from release preparation to successful delivery. You don't need to complicate things but you do need to recognise and respect the specific requirements of your stakeholders and the subject matter.

We used a simple Plan > Build > Accept > Deploy approach.

2. Clash of the titans – release versus change

Not surprisingly, this generated a lot of debate. Whilst most attendees liked the split between functional and non-functional as delineators for release and change, others preferred to use scales of complexity or situational judgements about whether a change warranted being formally 'release managed'.

Rob asked the fairly challenging question, "Do you think the difference between change and release is something that concerns us more than it concerns our customers?"

The answer – perhaps unsurprisingly – was a resounding, "yes".

3. Scoping releases

This can pose its own set of problems, but consider the following when scoping releases may help:

- Timelines (e.g. a schedule)
- Governance (controls, gateways and checkpoints)
- Activities (environments and resources)
- Sizing (deployment windows, number of days' effort, operational impact and so on)
- Priority (by business area, MoSCoW methods etc)
- Proactive approach (consider locking scope and fixed release slots. This may suit a daily or repeatable cycle)
- Reactive approach (waiting for a request to release or deploy and plan around the request candidate. This may suit a monthly O/S security patch cycle)
- Methodology – do you use Agile, Waterfall or something else?

4. Consider the role of your release manager

There are many types of release management role – but depending on how/where you position your RM function, you might want to consider the following:

- Technical – often focused on deployment, code or specific technology. This approach is good for version control and low-level tracking but can be in conflict with other technology sets or customer focus.
- Implementation – this usually focuses on the dress rehearsal and/or implementation to production. It has effective control over deployment to live but is often left to the end of the project – constraining time and effort.
- Project & scheduling – usually led by a project or environment manager, this focus on planning releases to various environments during a project. Should you choose this approach, ensure you consider early life support and that loyalty doesn't solely lie with the project side of organisation.
- Business relationship – a collaborative, content-driven approach between business and IT. This is good for shared governance, but caution should be used to ensure that there aren't conflicting agreements

between different stakeholders or too much focus on the short-term objectives.

- Enterprise – a more senior role with delegated authority for the release manager with visibility of multiple streams (project and non-projects) and the ability to resolve any contention issues. Often, this requires a team of analysts and SMT buy-in to implement.

5. Continuous delivery, agile, DevOps and waterfall

- Consider the Windows 10 fast/slow preview programme as an example of customers choosing to sacrifice some stability for responsiveness and new features – could you adopt similar principles in your organisation?
- Think about automated test and deployment to support your environment – regardless of methodology
- Don't be afraid to use a hybrid approach. Delegates compared and contrasted tradition/waterfall with a more agile approach for Dagen H. Whilst some expressed a preference towards one or other, the majority came up with the idea of mixing both agile and waterfall as the situation required – echoing Gartner's Bi-Modal IT model.

6. Tools

- There are a plethora of bought tools you can use for managing/tracking, build/deploy and Desired State Configuration (DSC)
- Don't be afraid to develop your own home-grown tools. The delegates developed checklists and a 'transition map' – Rob's rather grand name for a diagram that lists all routes to production in order of risk/impact/complexity
- Whatever you use, ensure you and your stakeholders can see at a glance how any given change may move from start to finish
- Equally your tools need to be useful for release management and reflect the scope of change they have to deal with. Decide which types of change need to have the release process wrapped around them.

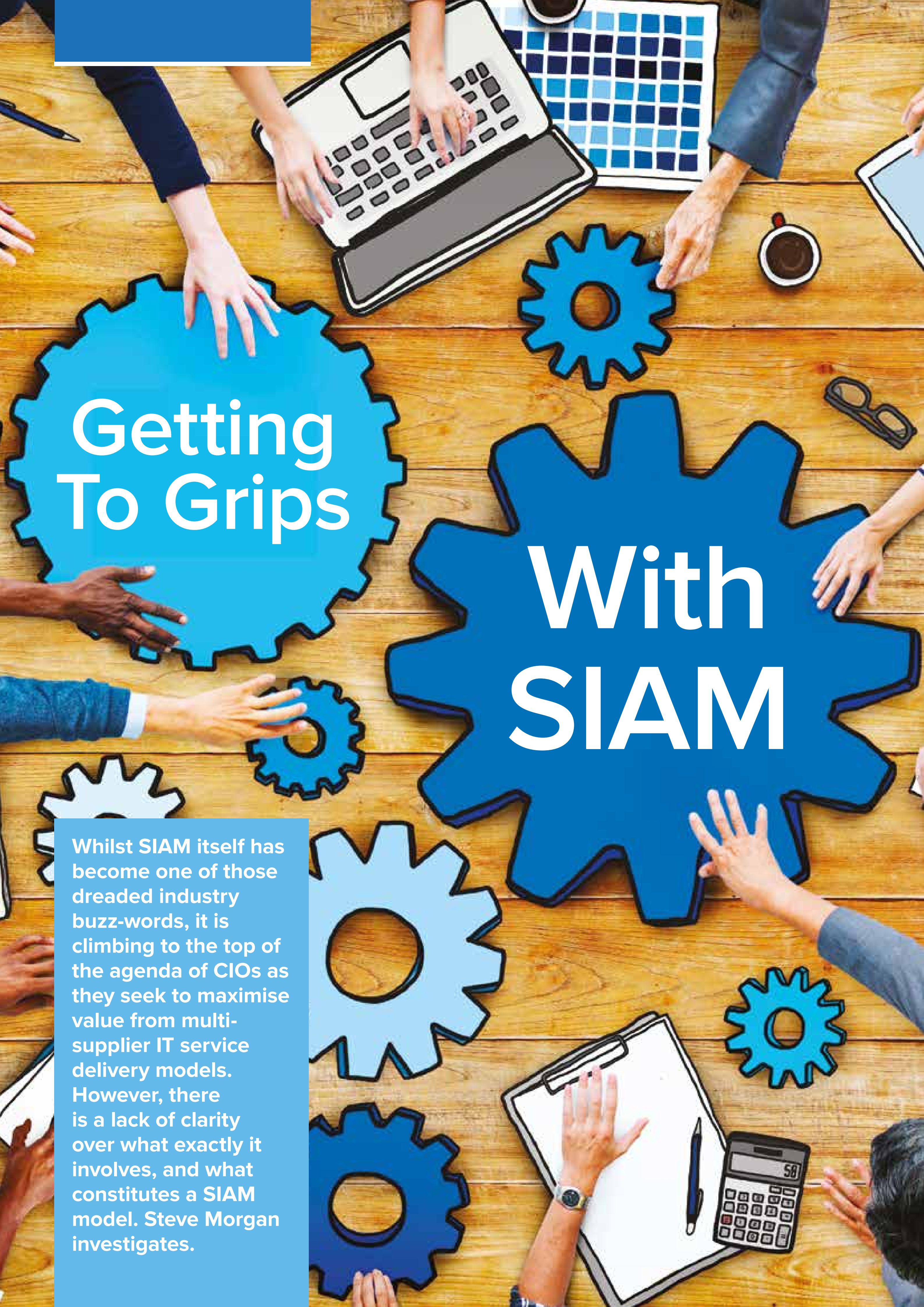
Whilst most ITSM professionals won't be involved in helping change the side of the street we drive on, we can help our release managers and customers benefit from delivering more, and breaking less, by continuously improving our approach to people, process and tools.

The feedback from those attending the Masterclass was generally excellent and delegates left with an array of resources including slides, whitepapers, a book and, above all, the shared experience and learning gained from networking with their peers. As someone who has been a delegate and a facilitator, I recommend Masterclasses highly – particularly if you have a new scenario you would like put forward. For more information about the ever increasing range of Masterclass topics, please consult the ITSMF website or office.

If you're interested in knowing more about the ITSMF UK Transition SIG, please contact Matt Hoey via the website, join our dedicated LinkedIn group, or follow us on Twitter: @itSMFUKTransMgt, @JonMorleyITSM, or @ChangeRelease.

"Do you think the difference between change and release is something that concerns us more than it concerns our customers?"

Jon Morley and Rob Spencer are vice chairs of ITSMF UK's Service Transition SIG. Rob is a Service Transition & Improvement Consultant at the Financial Conduct Authority and Jon is Service Transition Manager at the University of Nottingham.



Getting To Grips With SIAM

Whilst SIAM itself has become one of those dreaded industry buzz-words, it is climbing to the top of the agenda of CIOs as they seek to maximise value from multi-supplier IT service delivery models. However, there is a lack of clarity over what exactly it involves, and what constitutes a SIAM model. Steve Morgan investigates.

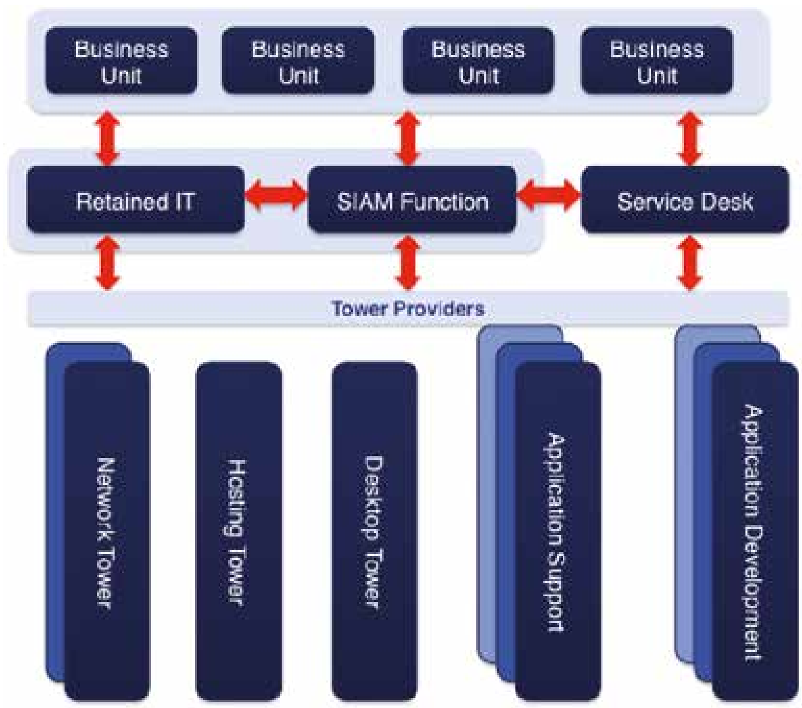


Figure 1 – SIAM within a generic IT operating model

Service Integration and Management (SIAM) involves the co-ordination of people, processes, and tools/technology across multiple service providers, be they internal or external, to manage the delivery of end-to-end service to the consumer. This is typically achieved through the creation of a SIAM function, where some or all of the IT management activities are undertaken.

SIAM is aligned to delivering business, service and end-user outcomes, rather than technology, system or application-focused outcomes, and is therefore dependent upon the ability to consolidate and aggregate data from traditional service towers.

Figure 1 describes where SIAM typically fits into a generic IT operating model. Notably,

- SIAM is a function which can be part of the retained organisation or sourced. We will explore this idea in more detail below.
- The SIAM function will govern the activities of the service providers in the various technology towers at the bottom of the diagram

Background and context

Conceptually, SIAM is not new. IT organisations have been managing multiple service providers in a single eco-system for many years. What is new is the recognition of the SIAM capability as a discrete function. In addition, SIAM offers a greater focus on governance in the following scenarios:

- Managing service provider contracts not just in terms of deliverables applicable to their tower, but with more of an emphasis on business outcomes
- The need to drive collaboration between service providers against a backdrop where suppliers have traditionally been suspicious of signing up to contracts
- Service management governance for processes and tools in a supplier eco-system.

The rise in prevalence of SIAM models has been brought about by a number of factors:

- The end of monolithic outsourced deals, signed in the early 2000s and which came up for renewal in 2008 onwards, has brought about the need for revised sourcing strategies, following the general perception that these legacy sourcing arrangements are no longer applicable in today's IT environment
- A rise in maturity of processes and tooling within the service provider community has led to the development of innovative service propositions
- The step change in the demand for IT to work differently, with more flexibility, more quick to respond to business needs, brought about by cloud, mobile, and social media
- The shift of IT to move closer to the business – IT is no longer the 'internal service provider' – IT is the business
- The ever-present emphasis on IT efficiency to drive down overall business costs
- The extensive work undertaken in central government to define SIAM sourcing models, which led to several high-profile central government organisations adopting a SIAM approach to IT Service Delivery and a broader industry awareness of and interest in SIAM.

Business drivers

So, what drives organisations to a SIAM model, and when is it particularly applicable? Typically, SIAM programmes are derived from strategic sourcing activity, involving the re-tendering of one of more service towers. At an even more strategic level, the development of a revised IT operating model may also lead organisations to consider a SIAM approach.

The key drivers which encourage organisations to consider a SIAM model are:

- Risk reduction

Those organisations emerging from a long-term sourcing deal with a single vendor will be looking to reduce their operational risk, but adopting a model which allows for greater flexibility, and which spreads delivery accountability across multiple service providers.

- Expertise

One of the benefits of the SIAM model is to enable IT organisations to develop a sourcing model which allows service providers to play to their strengths, thereby leveraging a service provider eco-system where each supplier is best-in-class. In theory, this should allow the IT organisation to increase overall efficiency and effectiveness.

- Changes in business demands being placed on IT

The way in which IT operates needs to evolve to meet the ever-changing demands of the business. As business operating models change due to emergence of cloud, mobile, etc, IT must keep pace by developing innovative ways to deliver IT services which meet these demands, and also enable the business to innovate further.

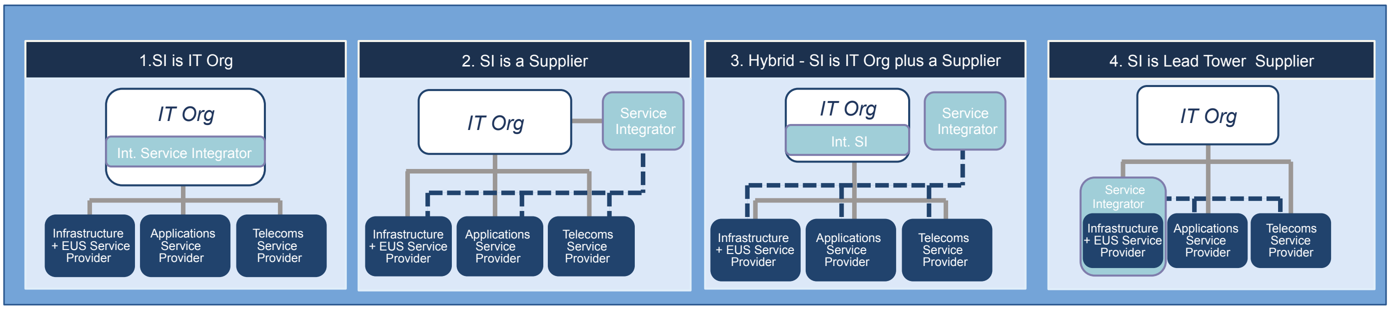
- Increased accountability

A SIAM model allows an IT organisation to have greater clarity over accountabilities of the SIAM and tower service providers, using a number of levers. Process documentation such as swimlane diagrams, RACI charts, etc, provide a single reference point for delivery accountabilities and responsibilities. Similarly, contractual relationships with external service providers will typically cause the IT organisation to have to describe responsibilities and accountabilities at a far more granular level than they have done in the past, as parties within the eco-system seek to develop accurate service models upon which they will base their own resource, cost and risk management models.

- Service provider flexibility (onboarding/offboarding)

As IT delivery models evolve, there is a growing need to provide a more flexible supplier eco-system which enables organisations to onboard new service providers to support, for example, new infrastructure or application development requirements.

- Introduce competitive tension



Ref	Description	Key Benefits	Key Disadvantages
1	Wholly insourced	• Retained organisation retains accountability for all aspects of SIAM • Greater opportunity for organisation to own intellectual property	• Cultural change can be problematic if moving from a legacy sourcing contract to a SIAM model • Development of SIAM capability will impact implementation timelines, and subsequently the time to realise benefits
2	Outsourced to a dedicated provider	• Ability to leverage best practices and established models • Ability to leverage economies of scale	• Introduces complexity in terms of defining who will make business decisions and to what extent these will be delegated • Potentially more complex contractual model
3	Hybrid	• Provides ability to leverage both retained and service provider teams to blend knowledge, skills and experience	• Sizing can be problematic • Contractual arrangements can become overly complex
4	Sourced to a tower provider	• Provides a more compelling commercial proposition to the service provider • Enables the service provider to ramp up their business knowledge more quickly through greater exposure to the business	• Sizing can be problematic • Contractual arrangements can become overly complex

As specific transformation and development work packages are developed by the IT organisation, a flexible SIAM model allows organisations to introduce competitive tension between service providers, to ensure that they realise innovative, cost-effective solutions from their suppliers.

- Desire to own and retain intellectual property

One of the major drawbacks of the legacy outsourcing arrangements was that the service providers tended to own the intellectual property (e.g. code, business data, architecture information, etc). This contributed heavily to the inertia in sourcing strategies, as the act of moving to a new sourcing strategy represented a significant operational risk as the new service provider sought to assemble and assimilate vital business artefacts and data. A SIAM model provides the platform for the retained IT organisation to own the intellectual property in, for example, a shared Configuration Management System (CMS) which is accessible by all parties.

SIAM models

The rise in prevalence of SIAM models over the past five years has brought about greater clarity in the types of model which can be deployed to meet SIAM objectives. Each model has its benefits and disadvantages, which are described above.

Business outcomes

Whilst the decision to go with a SIAM model will often be driven by the sourcing strategy, key factors to consider are the desired business outcomes that transition to a SIAM model will achieve.

These are summarised below:

- **Improved responsiveness to service performance issues outages**

  By defining support models at a granular level, and mapping these to an effective CMS, it becomes easier to assign accountability for the resolution of incidents and problems. Effort is required to achieve this, but there are significant benefits to be unlocked if clarity of the support model is achieved.

- **Improved IT reliability**

By using best-of-breed service providers across IT service towers, it is possible to deliver highly reliable, available IT services. In addition, as new service providers are on-boarded, there are opportunities to transform IT service towers as part of continuous improvement activity.

- **Improved responsiveness to changing business needs**

  By assigning service towers accountable for demand management to the SIAM function, it is possible to improve IT project and resource forecasting. In addition, service providers will typically have a greater ability to flex resources more responsively than a retained IT organisation, thereby achieving improved response times to planned and unplanned IT resource requirements. The outcome of these factors is a decrease in time-to-market, which is a critical factor in today's environment.

- **Efficiency**

  Through the implementation of a consistent process model and the exploitation of automation, it is possible to improve efficiency across the SIAM eco-system. It is critical that all service providers operate within a common process framework, and that the retained organisation defines a tooling strategy which is applied rigorously across the SIAM eco-system.

Challenges

Developing an effective governance strategy

The introduction of a SIAM model can make development of an effective governance strategy extremely complex. An effective governance model will address the following:

- IT service performance
- Service provider performance
- Demand and resource management
- SIAM tooling maintenance and improvement
- Continual service improvement and innovation
- Project delivery

The most complex challenge lies in developing an effective governance timetable for IT service performance and service provider performance. If a service level management approach has been adopted, as described in the ITIL framework, service level agreements with the business will be underpinned by contracts with the relevant suppliers, and will contain measures relating service performance, support and availability. The complexity lies in the alignment of the various reporting and governance forums with report production schedules. There is a risk that production of business-facing service performance reports gets delayed by the delivery of service provider reporting, the content of which will be used in the business-facing reports. This issue can be overcome with careful planning and the use of technology, but it nevertheless remains a complex challenge, which requires careful planning to resolve.

Sourcing strategy for the SIAM function

As described above, there are options over how a SIAM model is delivered, and the most important of these is the question of whether the SIAM function is sourced or retained. Each model has its own merits and drawbacks, and there have been several high-profile examples of successful SIAM implementations which have demonstrated how each model can work. The decision as to which model to adopt should not be taken lightly, and should be decided in the broader context of the IT operating model, sourcing strategy and the over-arching desired business outcomes.

Driving a truly collaborative approach

For a SIAM model to be truly effective, each service provider in the eco-system must be committed to the concept of a collaborative approach. This applies equally to, for example, the day-to-day service management activities of incident, problem and change management, as it does to supplier performance management, reporting and demand management. This can be difficult to achieve given that many IT organisations will have experience of sub-optimal sourcing arrangements which have caused mistrust and dysfunctional relationships with service providers. Many service providers will themselves have cultural and process challenges to overcome as they get to grips with transforming their own organisations to work collaboratively within a SIAM eco-system.

Tooling

IT organisations often fail to fully understand the implications of a SIAM model on their existing IT tools, in terms of ownership, access and day-to-day use. Primarily the impact is on the IT service management tool, but there are impacts elsewhere on other tools such as monitoring, capacity management and software asset management. A tooling strategy must be developed and supported by an operating model that describes how processes and tools will operate within the proposed SIAM model, prior to embarking upon a SIAM implementation.

Service measurement

In a SIAM model, IT services are likely to delivered by multiple service providers. This introduces the challenge of collating their individual performance and availability data to collate end-to-end service performance. This is almost impossible to do without extensive support from a sophisticated service management tool and must therefore be incorporated into the tooling strategy suggested above.

Implementation approaches

The implementation of a SIAM model must be considered as part of a broader IT sourcing strategy. The direction set by the sourcing strategy will determine the suitability of adopting a SIAM model, and will need to be subsequently reflected in the creation of Request's For Proposal (RFPs) to the relevant service providers.

The development of an IT operating model should be undertaken as a means of describing the processes, organisation and technology to be created. This should also describe the desired ways of working in the future mode of operation, and describe the differences between this and the current working practices.

The differences between Current Mode of Operation (CMO) and Future Mode of Operation (FMO) should then be used to develop a change programme which encompasses:

- Sourcing
- Operating model implementation, including organisational and process design
- Cultural change
- Technology

Phasing the implementation of the SIAM model should be considered carefully, and will preferably link closely to the implementation of the change programme and its constituent parts, as described above.

SIAM trends and future direction

IT is an industry that is never short of a buzz-word, trend or new development we have already witnessed the emergence of cloud and mobile, and IT departments have changed radically to better deliver and support these technologies. DevOps is gaining more prominence, and it is likely that any new IT operating model will incorporate this into its strategy, to ensure a more integrated approach to development and support, particularly in the structure of application towers and their relationship with the SIAM service provider.

Currently, there is no defined industry guidance relating to SIAM. Undoubtedly, existing frameworks such as ITIL will contribute greatly to the service management elements, but SIAM is far broader than merely establishing a service management function.

Meanwhile SIAM, despite attempts to define it, remains enigmatic. Efforts are underway by ITSMF UK's SIAM Special Interest Group, tasked with defining SIAM more deeply, to arrive at a more generally accepted definition of the various approaches, benefits, implementation options and business outcomes it is likely to achieve (see the following article for a progress report).

Steve Morgan is Director of Syniad IT Solutions. He has over 25 years of experience of working in IT, both in operational and consulting roles. He led the KPMG Service Management team in the UK before leaving to form Syniad IT Solutions Ltd in February 2012.

The new SIAM SIG – too many acronyms but a great day!

Steve Morgan describes a new ITSMF UK initiative which is setting out to put some meat on the bones of service integration.

Recently I chaired the inaugural ITSMF UK SIAM SIG meeting – not some strange codebreakers' seminar as the long acronym might suggest, but our first special interest group event focusing on service integration & management.

I've chaired the Service Level Management SIG in the past for ITSMF, and as SIAM is now my passion, I decided to get a new group off the ground to focus on this complex issue. Its aim is:

- To agree on a definition of Service Integration and Management (SIAM), recognising the various forms in which SIAM appears today.
- To agree a common language and definitions of common terms for SIAM
- To outline the variations of the various SIAM models, and comment on the suitability, benefits and disadvantages of each
- To describe the implementation approaches relating to SIAM
- To agree upon a set of common challenges in a SIAM environment, and publish content pertaining to these
- To run a series of events for ITSMF UK members to share knowledge and obtain feedback
- Ultimately to collate the content produced into an industry recognised SIAM framework, publishing it as an ITSMF UK publication.

The SIG consists of representatives from the service provider community as well as those who represent the 'customer' world.

We had a great day at the inaugural event, which was hosted by HP at their offices in London. The day started with an overview of the HP view of SIAM, and we soon progressed into some lively debate about what SIAM really is, using a paper published by the ITSMF that I wrote as a discussion document to get the conversation started (the paper can be found in the member reference library on the website).

The aim of the working groups is to produce some content in a series of Agile-like 'sprints'.

We also spent some valuable time discussing potential working groups within the SIG. The aim of the working groups is to produce some content in a series of Agile-like 'sprints'. Our working groups are:

1. Processes (including what's in and what's out of SIAM, what's the demarcation between service providers and customers/ retained?)
2. Business case
3. Tooling (including data model)
4. People (including cultural change, behavioral issues)

We're aiming to have regular teleconferences, supported by bi-monthly face-to-face meetings. I'm really excited that as a collective group, encompassing both customers and service providers, we can really start to define some principles around SIAM, its issues and challenges, and the benefits that it can bring.

If you would like to get involved, then please head over to the Contact Us area of the website and get in touch.

I'll keep you updated as to how we progress.

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David Howell looks at the rise in smartphone use and flexible working and explains how giving business users control of simple self-service tasks can keep them up and running away from the office while easing the burden on the service desk

The real benefits of self-help

In a fast-paced service desk environment, the knowledge-base is a go-to repository for easy answers to common and specific challenges.

In recent years, IT technicians have accessed these quick fixes via service desk apps which enable them to work away from a fixed location. However, with more end users now working out of hours using mobile devices, providing this support on a 24-hour basis can be both difficult and expensive.

Rather than keeping an open-all-hours service desk or seeing IT staff bogged down with mundane, easy-to-manage tasks, web-based self-service portals combining self-help iOS and Android service desk apps can enable users to fix basic challenges at any time.

In addition to supporting professionals who already use IT mobility tools for on-the-move and flexible working, these facilities also saves time and budget by reducing the requirement for round-the-clock support and cut the volume of calls that must otherwise by managed by the service desk.

Pocket portal to the web – and the workplace

According to Ofcom, Britain has officially become a 'smartphone society'. Two-thirds of the population now own a smartphone and they have overtaken laptops as the UK's preferred device for accessing the internet.

As well as highlighting the need for businesses to adapt their strategies for mobiles, Ofcom's latest research found that one in three people say a smartphone is their most important device for going online, compared with 30 per cent who cited laptops.

For enterprises, one of the major challenges of the continued popularity of handheld devices is security. Having grown accustomed to texting, emailing and browsing the web on their own choice of mobile or tablet, many professionals began using them to send, receive, store and work on corporate documents, giving rise to what became known as a 'bring your own device' trend.

While some enterprises are yet to respond to this security challenge, many businesses have either sought to secure private devices on the corporate network or issue a choice of company-owned alternatives – a policy known as 'choose your own device.'

In parallel with the continued rise in mobile working and the popularity of mobile tools, last year the UK Government introduced the legal right to request flexible working. Combined with the rise in companies actively using flexible working policies to attract and retain talent, and those seeking to reduce physical overheads by swapping allocated desks for hot-desking, these converging factors continue to contribute to an increase in the number of people working from home, on the train or from their local coffee shop.

Self-management for flexible and remote working

To keep remote and flexible workers up and running – whatever time zone or schedule they are working to – the modern service desk must not only accommodate 9-to-5 business-as-usual queries but also offer support provision out of hours.

When offered and properly communicated to the business, this is another reason why self-service has become a must-have for end users. For technicians, it also helps reduce time spent handling tickets that could be solved by end users.

Designed with the ordinary professional in mind, a good self-service portal makes it easy for end users to create and track tickets online, as well as self-solve common issues by reading the solutions – rather than picking up the phone or sending emails to the service desk. In the same way that technicians and IT support users and each other with knowledge-based technical articles, this gives users access to a range of solutions to straightforward and common challenges.

Responding to the rise in professionals using smartphones and tablets for work, intelligent self-service apps can also help all professionals to manage their own security settings via a secure, web-based end-user password reset management app.

With any-time support available from any web browser and secure apps helping users carry out simple tasks, service desk teams avoid repetitive jobs and can instead focus on more challenging activities that help avoid the boredom and dissatisfaction they might otherwise feel. Meanwhile, as well as reducing the time and expense of out-of-hours service calls, the ability to carry out their own quick-fixes helps keep employees mobile, working and productive.

David Howell is European Director at ManageEngine

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