

AUTUMN 2016

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Problem management and
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Next steps for
service integration

Two-speed service catalogue

25 years of ITSMF UK



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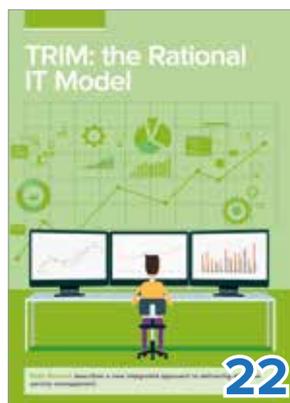
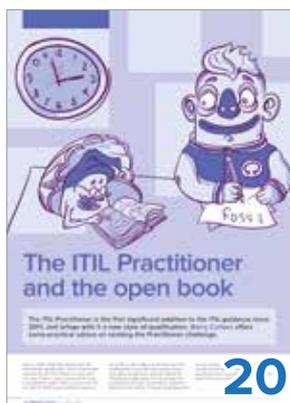
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Editorial

As ITSMF turns 25, there can be little doubt that the rate of change within our industry, and more broadly within the business world, is accelerating. Technology allows businesses to respond to new demands in hours rather than months, and those that cannot respond quickly lose competitive advantage.

The business landscape is equally unpredictable. Just this year, we've arguably witnessed more political change on both sides of the Atlantic – with consequent ripples and repercussions across the economic world – than in the preceding decade. And with every significant change in the way that business organisations and the public sector operate, IT and IT service management need to adapt and respond accordingly.

Small wonder that we're seeing so many new ways of approaching service delivery: agile working, DevOps, service integration, new standards and frameworks, all intended to make services more relevant and responsive to the business requirements they fulfil. For most organisations, adopting new tools does not mean abandoning the old. Indeed,

as the CIO Watercooler research in this issue reveals, ITIL is definitely alive and well, at the centre of service management initiatives across the world. But increasingly, businesses are using a hybrid approach to new ITSM work, requiring new skills and a different kind of guidance.

Part of the role of ITSMF UK over the last 25 years has been to track industry developments and offer appropriate advice and research to support members. This mission hasn't changed. In this issue of ServiceTalk, you will find articles from our own special interest groups focusing on two-speed transition, problem management and the ITIL Practitioner, and new research on service integration – all key topics for those combining traditional ITSM with new practices.

We also look in depth at skills: bringing business and education together, broadening the skillset of established practitioners, and building a service management profession that will attract those with the right competencies.

Whatever the next 25 years bring, ITSMF and ServiceTalk will – for the foreseeable future – continue to provide the guidance and content that service managers need to do their job more effectively.

Happy reading!



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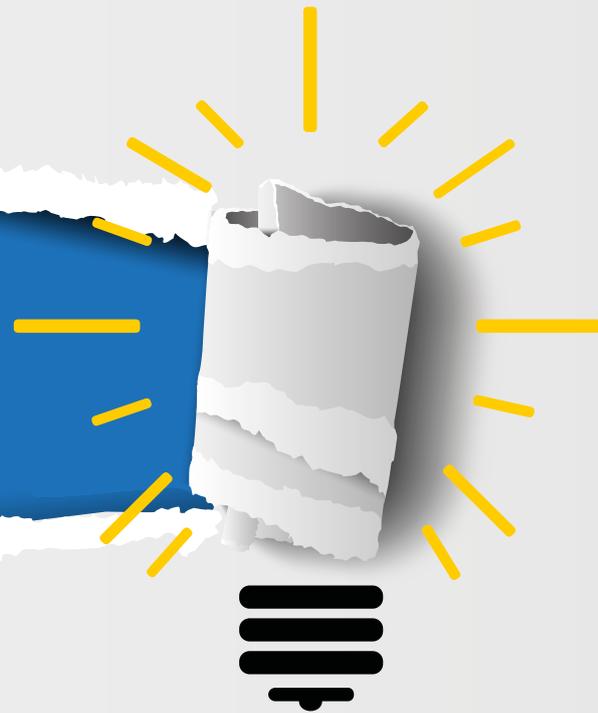
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Innovator, opinion maker and voice – 25 years of ITSMF UK



As this issue of ServiceTalk is being prepared, we're gearing up to welcome many of you again to our Annual Conference and Awards, held at The Sofitel London Heathrow.

This year is an extra special one for us as we'll be celebrating our 25th anniversary too, 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.

The over-arching theme for this year's Conference is 'Professionalism in ITSM', reflecting ITSMF UK's current drive to develop and advance ITSM as a professional discipline and sector, and we'll be showcasing our work in this area by bringing you up to date with the development of our Professional Service Management Framework (PSMF).

ITSMF (or ITIMF as it was called then) was incorporated on 7th November 1991. Back then, mainframe computers were still commonplace; today they have largely been overtaken by enterprise computing and cloud-based services. Modern organisations are hugely dependent on IT for their business transactions and, of course, they are reliant upon them in ways which were not even conceived of 25 years ago.

What hasn't changed though is the need for a reliable service. Businesses selling goods and services online are still just as reliant on sound, best practice management processes as our predecessors were. Indeed, ever changing technology and the speed of delivery now required to keep up with more demanding markets mean that we must be more flexible than ever before but also continue to meet and support the needs of our businesses.

The challenge for ITSMF UK now is to keep pace with developments within our industry

and to respond to the demands from our members to provide relevant guidance and opportunities for discussion and networking. When we started 25 years ago, we were a lone voice - for some, the only place to go for service management advice and guidance. Now, we have to acknowledge we're not the only game in town; there are many competing alternatives out there and we have to adapt accordingly.

ITSMF UK needs to be an innovator, an opinion maker and, most of all, the voice of our industry.

There is a growing determination within the industry to make service management relevant and valuable to the whole business, beyond the traditional boundaries of IT. I believe our role is to position ITSM as a real business enabler with valuable skills the whole enterprise can leverage; in short, to stand up and be counted as a professional business discipline.

Here, the challenge is to determine what messages we should be sending out and how we can communicate them most effectively, both within the membership and more widely, in industry, education and even government. 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 continue to believe that maintaining the balance between supporting our corporate and enterprise members and servicing the needs of smaller business and individual members is the best way to harness best practice and innovation for everybody.

As we move on to a new era, we do so in a very positive frame of mind. We fully intend to remain true to our guiding principles of industry independence. 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 and energy you expend and the expertise you share on our behalf.

I look forward to seeing as many of you as possible at our Annual Conference and Awards, this year and for many more years to come.

Best regards

Rosemary Gurney



Rosemary Gurney is Chair of ITSMF UK

ITIL still ahead of the pack in recent industry report

ITIL is still the most widely used and valued approach to ITSM, according to a recent study by industry researcher CIO WaterCooler, sponsored by ITSMF UK.

The research, based on responses from CIOs, heads of IT, and senior managers at organisations of various sizes, set out to determine how well regarded service management is within the business world, where it adds value, and whether it is perceived as a genuine profession.

Despite the burgeoning range of frameworks and philosophies available in the industry, such as DevOps, COBIT, ITIL4IT and SIAM, around 90% of respondents to the WaterCooler research viewed ITIL as their primary guidance for supporting the business, with no sign of it losing traction.

Respondents to the survey also noted that ITSM is appreciated and valued not just by IT, but by non-IT business areas. There is a clear correlation between perception of value and clarity of message – in other words, business customers have a more positive view of ITSM where this has been clearly articulated by the IT organisation. What's more, the benefits of service management are not just confined to the IT area: 36% of organisations are reaping the benefits of incident, change and supplier management in other areas of the business,

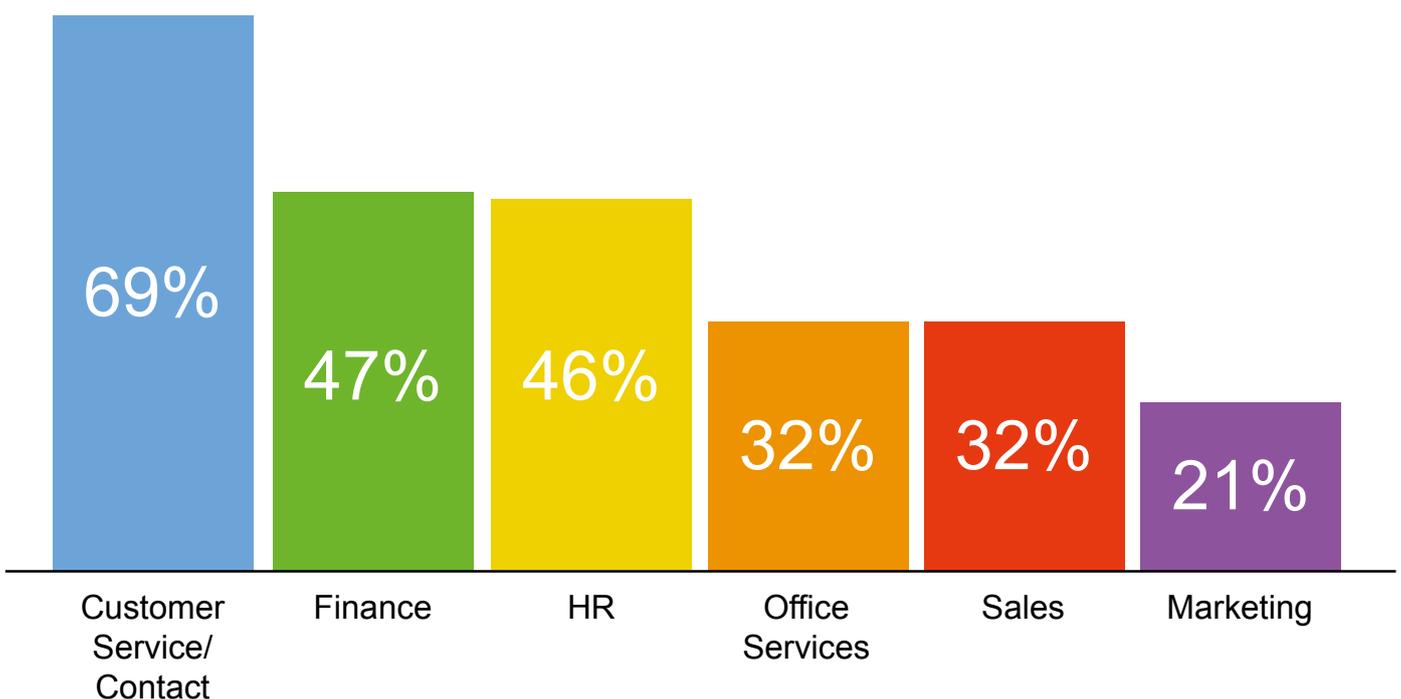
with customer service, finance and HR seeing the greatest uptake of service management rated disciplines.

Interestingly, 94% of respondents do see ITSM as a valid profession, with interpersonal/relationship skills given the highest priority, compared to traditional process and technical skills. This focus on the wider set of competencies needed supports the ITSMF UK approach to ITSM professionalism through the PSMF initiative (see the opposite page for further information), and highlights the growing trend for service managers to be drawn from a broad range of business backgrounds.

Most respondents expected to see increased investment in service management in the months ahead, but clearly this will depend increasingly on service management's ability to stay relevant (and indeed ahead of the curve) in supporting the needs of the business. Surprisingly, there was a mixed response in the survey to the relevance of ITSM to cybersecurity, but most organisations saw at least some role for service management skills in tackling this particularly challenging issue.

To view a copy of the full report, visit www.ciowatercooler.co.uk

“94% of respondents do see ITSM as a valid profession, with interpersonal / relationship skills given the highest priority, compared to traditional process and technical skills.”



Proportion of non-IT business areas using ITSM practices.

PROFESSIONAL SERVICE MANAGEMENT FRAMEWORK



NTT DATA gains Trusted System status

NTT DATA is the latest organisation to receive PSMF Trusted System status from ITSMF UK for its ongoing commitment to professionalism in service management. The Professional Service Management Framework (PSMF) is designed to recognise excellence among organisations demonstrating their commitment and maturity in approaching ITSM professionalism.

In preparation for the endorsement, ITSMF UK worked closely with NTT to review and assess the current skills and competencies of its members and the programmes in place to support career development. This involved a review of three different performance management systems against a set of maturity criteria, including management systems; policy and process; top management commitment; leadership accountability and responsibility; controls; evidence of (process) use; and PSMF compatibility.



Damian Bowen receives NTT's PSMF endorsement from ITSMF UK CEO Barclay Rae

"As a result of the definition, control, consistency and rigor applied in the three systems in scope, ITSMF UK endorses them as demonstrating NTT DATA's ongoing commitment to professionalism in service management," said the assessor's report. "Confidence in the integrity and consistency of NTT's underlying systems gives ITSMF UK the ability to grant them Trusted System status, and to award credits to individuals against the Framework."

Damian Bowen, Director, IT & Client Service Delivery at NTT DATA, said he was delighted with the result of the review, and very pleased to work with ITSMF UK in raising the level of professionalism within the industry.

ITSMF UK CEO Barclay Rae commented, "Many congratulations to the management and team at NTT for their commitment and support to service management professionalism. We are delighted that the company has seen the value in this initiative and look forward to a continued and successful working relationship with them in the future".

For further information about PSMF and Trusted System status, and our new member scorecards for recognitions and credits, check out the website at www.itsmf.co.uk/psmf

A big thank you to Anna and Maire

We're sad to report that two of our regional chairs have recently decided to step down from their roles.

Anna Leyland, of Sopra Steria, has been chair of North Region for the last two years. At her last regional event, kindly hosted by Rolls Royce at their new Washington (Tyne and Wear) disc facility earlier this month, she was thanked for her effort and support by incoming chair Jennifer Smith of DJSS, who mentioned the sense of teamwork and engagement that Anna has engendered within the North region committee.

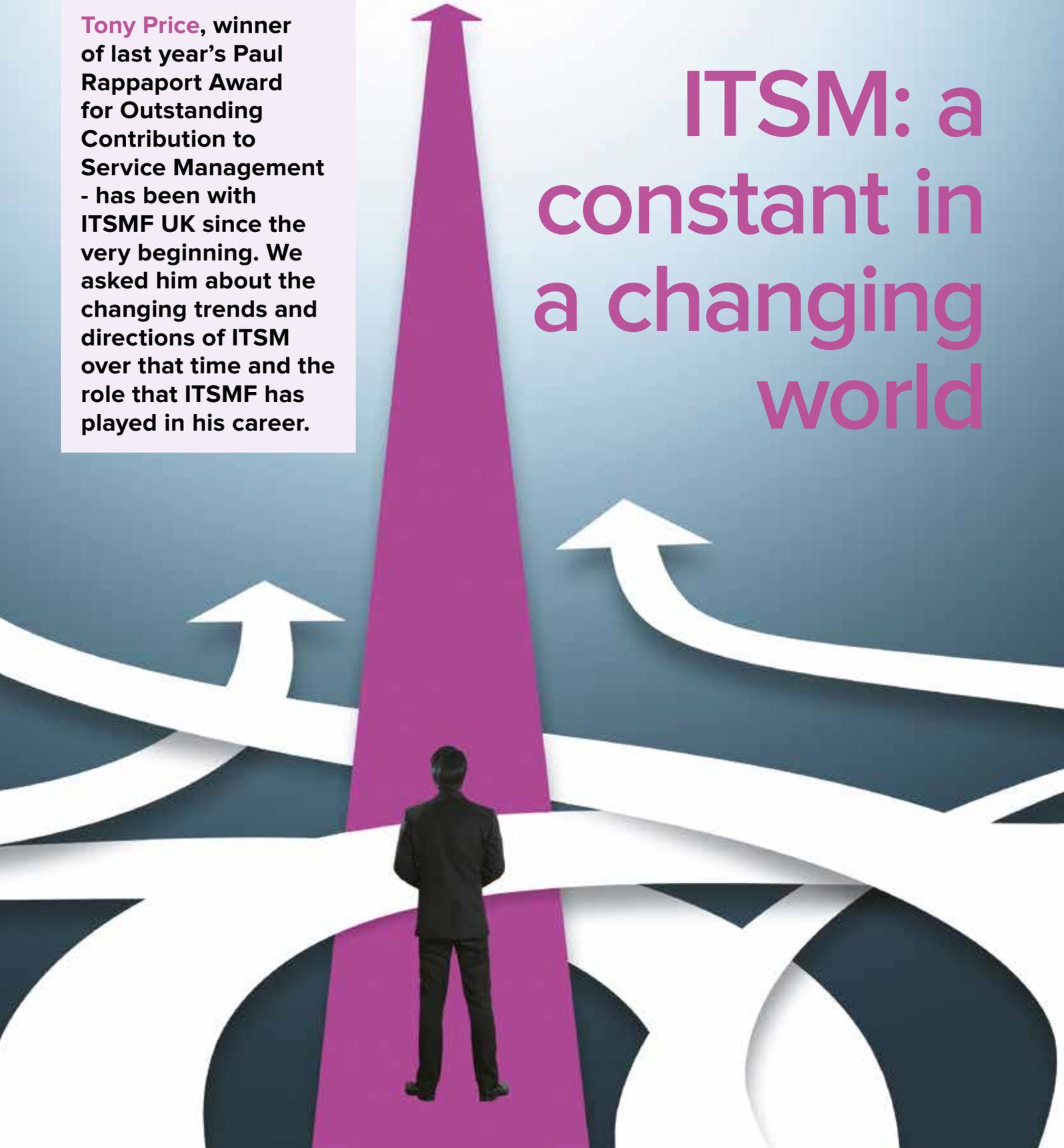
Meanwhile, Maire O'Hare of Belfast City Council is stepping down as chair of Northern Ireland Region, a post she has held for a number of years. Despite the relatively small size of the NI regional group, Maire has built up a consistently strong attendance and a range of excellent presenters at the local meetings, and we're very grateful for her hard work and commitment to the region. The NI chair post is currently vacant – anyone interested in taking on the position should contact the ITSMF UK office.



Anna Leyland (right) hands over the North Region reins to Jen Smith

Tony Price, winner of last year's Paul Rappaport Award for Outstanding Contribution to Service Management - has been with ITSMF UK since the very beginning. We asked him about the changing trends and directions of ITSM over that time and the role that ITSMF has played in his career.

ITSM: a constant in a changing world



ST Tony, you've been an active member of ITSMF UK since the beginning – in fact I believe you attended the very first conference. Why is ITSMF membership important to you?

TP That's correct, I have been to every ITSMF UK Conference, including the inaugural one at the Treasury in London. My career has evolved so much over that time, which is why I really value my ITSMF membership; there has always been something relevant going on at ITSMF at every stage of my career. The ITSMF itself has also evolved to stay relevant for

me and the people I have recommended to become members.

I also really value the professional interaction that the ITSMF has stimulated for me over the years, allowing me access to different opinions and points of views, to new industry trends and to some amazing software-related developments in ITSM.

ST You received our most prestigious award – the Paul Rappaport Award – at last year’s conference. First of all, congratulations on this great achievement! What does it mean to you to be part of such an illustrious list of recipients?

TP Years ago I worked for Ultracomp, and Paul Rappaport was one of the owner/directors. He was my manager, my mentor and my personal friend. When he died, it left a hole in my life. To win an award with his name on it related to an industry that has been the focus of my life’s work was incredible and something of which I will always be very proud.

In addition the illustrious list of previous recipients are individuals I respect as key influencers in the world of ITSM. So this just makes me feel even more proud to be associated with them and this award. And of course it was also cool to receive the award from John Parrott!

ST How did you originally become involved in ITSM?

TP There are two answers to this question. I was working at ICL in Manchester, running mainframes in what we called a computer room (we would now call it a data centre). My boss told me some government people were coming along to look at what we were doing and that I had to be on my best behaviour and show them. We were then descended upon by a group of people from the CCTA. Quite annoyingly, interrupting my real work, they asked me lots of questions and asked me to show them what I did on a daily basis, as they needed to know for a series of books they were writing about GITIMM. I remember thinking, what type of job do they have, just traveling around watching what others do and then writing about it?? Little did I know at the time that GITIMM would later become ITIL and I was actually providing input to ITSM best practice.

Fast forward a couple of years... I was working for Ultracomp as a consultant, focusing on ICL VME mainframe support. I initially bumped into a colleague quite by accident on a client’s site in Edinburgh. Neither of us was aware that we were visiting the same customer on the same day and we had never met up to that point. His name was David Wheeldon and from that point on my career dramatically changed. David introduced me to ITIL and IT Service Management. I remember shouting out loud when he showed me the ITIL v1 Change Management book, “This was my change management process at ICL”, and all of a sudden things fell into place. I subsequently ran the first ever commercial ITIL training course in the

UK with David that led to the Manager’s Certificate (at that time it was the only exam available and only the CCTA had run non-commercial courses up to that point). I went on to run multiple training courses, manage teams of ITSM consultants, and - something I was personally very proud about - lead what at the time was one the world’s largest global ITSM projects (and which also won the ITSMF UK Project of the Year award!)

ST What are the biggest changes (encouraging or otherwise!) that you’ve noticed in ITSM and ITSMF over the last 25 years?

TP I have always believed that one of the biggest benefits of ITSM is that it is a constant in a changing world. There has and will always be a need for it and the fundamental principles behind it. However the way we deploy, operate and continually improve has massively changed over the last 25 years. Now we live in an environment where everything is required on demand - customers are simply not prepared to wait as they need to see instant value to remain competitive. So 25 years ago I was promoting the benefits of a CMDB when, in reality, there was only a handful of organisations on the planet that had one. Now because of the massive improvements in technology and the associated ‘out of the box’ software, I can demonstrate real-time analytics, big data, integrated social media etc etc. So software in the ITSM space has surpassed my expectations and I predict will continue to do so for the foreseeable future.

Slightly less encouraging, 25 years ago it was a major challenge to get organisations to realise they needed to adopt process to break down the technology silos and drive greater efficiency. Now I find myself encouraging organisations to break down the

process silos they have created which are restricting their overall efficiency. Though challenging, I feel lucky to have frameworks like IT4IT available: they help to break the ‘over optimisation’ that creates these silos and which would lead to systemic waste if not addressed by things such as a holistic view of IT as a value chain supported by value streams.

As for the ITSMF, I am a really big supporter of how the forum has evolved in recent years to be far more than an ITIL user group, and to embrace and drive professionalism in ITSM with initiatives such as the Professional Service Management Framework.

ST What is your current focus/area of responsibility in the day job?

TP I now run the worldwide IT4IT strategic consulting business for Hewlett Packard Enterprise Software Services. IT4IT is a standard governed by the Open Group and in my opinion is the missing link we have needed in IT for years. Now we have a prescriptive reference architecture for running the business of IT, bringing in concepts such as IT as a value chain supported by value streams (as mentioned earlier). I think it is absolutely brilliant and as a result I have focused my entire career on it. This re-focus does not mean I have turned my back on ITSM - far from it. I can now help clients to logically build on their ITSM investments whilst also enabling them to take the next step to even greater value.

ST If you were granted one wish for the future of service management, what would it be?

TP I’d like to see the fundamental principles of ITSM to remain constant while best practice continues to evolve and improve... whoops, that’s two wishes, but we really do need both.



Tony Price receiving last year’s Paul Rappaport Award for Outstanding Contribution to Service Management



Two-speed transition: the service catalogue

Agile, DevOps, the culture of doing more with less and doing it quicker, are all common expectations facing IT service providers in a world where the frameworks are geared more towards traditional approaches to service management. By pitting traditional against 'new' thinking in several areas of Service Transition (release management, the service catalogue and early life support), the ITSMF UK Service Transition Special Interest Group are taking on the challenge of arguing the case for applying two contrasting approaches. In this, the second of three articles from the SIG, **Vawns Murphy** and **Patrick Bolger** are focusing on the service catalogue.

Service Catalogue Driven Transition – The Traditional Approach (Championed by Vawns Murphy)

So let's get back to basics. ITIL defines the service catalogue as a database or structured document with information about all live IT services, including those available for deployment.

The service catalogue is part of the service portfolio and contains information about two types of IT service:

- customer-facing services that are visible to the business; and
- supporting (or technical) services required by the service provider to deliver customer-facing services.

WHY HAVE A SERVICE CATALOGUE?

1. **To provide and maintain a single source of consistent information on all operational services and those being prepared to be run operationally; essentially acting as a menu for the business to order IT services from**
2. **To make it widely available to those who are authorised to access it; in order to be**

effective the service catalogue needs to be front and centre of your IT operation so that it's used consistently.

3. **To help you plan more effective transition by using – or reusing - information from a well-established business and IT service catalogue**

In other words, the service catalogue is a menu of all services available to the business. It also provides the real link between the business and IT; it defines the business processes based on IT systems, enabling IT to focus on ensuring those services perform well.

Scope

The scope of service catalogue management is to provide and maintain accurate information on all services that are being transitioned – or have been transitioned – to the live environment.

The key thing here is to realise that the catalogue should be used to help drive transition.

Catalogue-driven transition objectives

The service catalogue is usually looked after by the service catalogue management process; but when used for transition, it has the following objectives:

- to manage and update information within the catalogue to help drive transition planning, knowledge management and other items created by the project
- to be used as a point of reference for services that are running, or being prepared to run, in the live environment
- to ensure the support of evolving information needs of other service management processes by including interface and dependency information e.g. change or incident management.

Value to the business

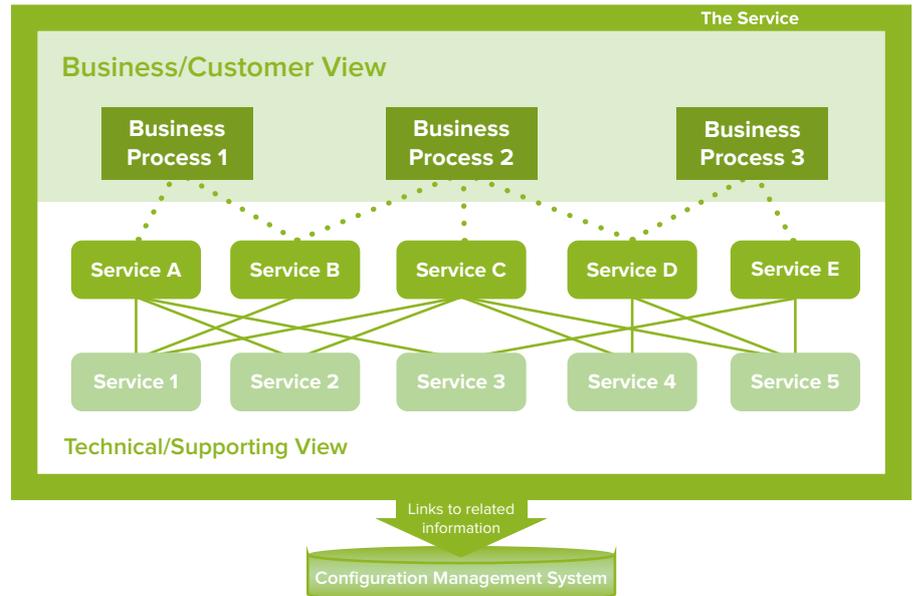
By using the service catalogue to drive transition, you can benefit your business by:

- providing a central source of information about the business services and (underpinning) IT services delivered by the service provider organisation
- reducing risk by introducing services that are aligned to the catalogue in a more structured and consistent way by leveraging existing information, i.e. by not simply making things up
- using a view that focuses on the customer-facing view of the IT services in use and the business processes they enable, i.e. services being transitioned can be shown in business terms.

Role of the service catalogue manager in transition

The catalogue manager is a role that is crucial for producing and maintaining the service catalogue. They can ease transition by:

- ensuring all operational services and services being prepared for operational running are recorded within the service catalogue
- ensuring the information within the service catalogue is accurate and up-to-date and is consistent with the information within the service portfolio
- ensuring that the information within the service catalogue is adequately protected and backed up



The above example shows how a catalogue has different views for both IT and the customer

- providing transition with baselined and target information for delivering new or changed services.

Different views

As mentioned earlier, there are generally two views of the service catalogue – business and technical. Both are distinctly different but equally important for the success of both the catalogue itself and transition in general.

The business service catalogue contains details of all IT services delivered to the business (in business language and available to the business if required). It should contain the relationships with business units and business processes that are supported by each IT service - typically, these are in the forms of Service Level Agreements (SLAs).

From a transition perspective, the business view helps us to understand the existing services and business processes that are likely to be impacted. As a result, transition can work with the business to ensure any risks are managed via the change management process

The technical service catalogue is usually an internal view that covers relationships with supporting IT services, shared services, components and configuration items necessary to support the provision of services to the business. It should usually define and document support agreements and contracts – typically, in the form of Operational Level Agreements (OLAs) and contracts with third parties.

This view helps transition to understand the underpinning items such as technology. It also allows processes such as configuration, change and release to identify tasks, risks and issues and update existing documentation and tools like the CMDB.

Key activities

One of the most important activities in establishing a service catalogue for your organisation is to set the right scope. Too small and it won't add any value. But too big and you risk being unable to manage the information, so your catalogue becomes out of date or contains incorrect information.

Rather than trying to boil the ocean, start with your most critical business services and build up your catalogue over time through transition of projects and new services. You can always add more detail later, but if your service catalogue doesn't have the right information in it, no one will use it and it will have been an expensive waste of time.

When capturing information for your service catalogue make sure you speak to both IT and the business. We've all heard horror stories of business critical databases run off a single spreadsheet or a standalone ancient PC that's never backed up so speak to both sides to make sure that what you're capturing is accurate.

Make sure you build a way of keeping your service catalogue up to date – particularly through transition. Some options could include:

- quarterly audits and/or monthly spot checks
- a step in the release management process whereby a release can only be marked as successful if all supporting documentation, including the service catalogue entry, has been updated
- a step in the incident management process where service desk analysts check information against the catalogue when a user comes in.

Challenges and risks

Even if you choose to use or develop a service catalogue to help drive transition, there is no guarantee of success. Below is an overview of some of the common problems we've encountered and how these might be overcome:

Final thoughts

The service catalogue is your shop window into the IT department. Used well it can be deployed to drive efficiencies in operational areas like incident management and request fulfilment. However, it can also be used as a supporting player in decision making at CAB meetings and in assessing the impact of planned projects.

By having one central point of contact for all IT service information, the service catalogue ensures that the information available to customers is accurate, consistent, easy to find and actionable.

Over to Patrick...

Service Catalogue Driven Transition – The Agile Approach (Championed by Patrick Bolger)

Increasing demand on IT organisations, including in the transition department, to control costs, demonstrate value and deliver services that are business-centric has resulted in a significant upsurge of interest in service catalogue and service portfolio management.

The service catalogue drives the service perspective, enabling transition groups to set expectations, streamline service provision and consistently deliver on their promises. Despite the obvious need and potential benefits of the service catalogue, making this work has been a real challenge for organisations and individuals alike.

Theory versus practice

IT practitioners look to the core ITIL books for guidance. The service portfolio is at the core of Service Strategy, where IT defines its market and capabilities and works with business executives to ensure services provide value by meeting business objectives. IT deals with the technical challenges and risks in the Service Design phase, ensuring that services are fit for purpose/use, and provide the desired business outcomes. New or changed services appear in the service catalogue through the Service Transition phase, where issues are captured and resolved before release into the production environment. IT manages normal consumption of the service through Service Operation and Continual Service Improvement closes the loop, providing feedback into the other phases of the

Challenge/risk	Advice
Inaccuracy of data in the catalogue and not subject to change control	Include the service catalogue in your change management process. By having a related change record against every entry you can ensure that only correct information is added and that any errors can be quickly and easily fixed. Use a standard change or template so that there's no excuse for not following the correct process.
Poor access to change management, configuration and knowledge management systems	Configuration & change management are your friends so get them involved. Ask change management to include the service catalogue in the CAB meeting terms of reference so that when people raise changes, they can be traced back to a service catalogue item and configuration management can be used as a source of technical information from the CMDB.
Poor acceptance of the catalogue and its usage	Make the service catalogue actionable. Stick it front and centre on your service desk web page and if possible add automation so that users can raise incidents, projects and service requests directly from a service catalogue item.
Inaccuracy of data in the catalogue and not subject to change control	Include the service catalogue in your change management process. By having a related change record against every entry you can ensure that only correct information is added and that any errors can be quickly and easily fixed. Use a standard change or template so that there's no excuse for not following the correct process.
Poor access to change management, configuration and knowledge management systems	Configuration & change management are your friends so get them involved. Ask change management to include the service catalogue in the CAB meeting terms of reference so that when people raise changes, they can be traced back to a service catalogue item and configuration management can be used as a source of technical information from the CMDB.
Poor acceptance of the catalogue and its usage	Make the service catalogue actionable. Stick it front and centre on your service desk web page and if possible add automation so that users can raise incidents, projects and service requests directly from a service catalogue item.

lifecycle. Makes sense, doesn't it? Well it does, but only if you're addressing each phase.

Reality is very different for the majority of IT groups that are operating 'flat out' just to keep IT running as well as having to continually take on new and changed services through transition. Despite their aspirations, the strategic ITSM processes that integrate IT activities with business goals (service portfolio, demand and financial management) are a bridge too far and they simply don't have the budget, time, or resources to tackle these proactive processes. Effort is expended on IT operations, so IT and business strategies are not entirely integrated or transitioned effectively. The business views IT as a trading expense, and sets a primary objective to 'run IT better, faster and cheaper than last year'.

Poor IT governance and senior executives failing to communicate business goals and objectives mean that IT is left in the dark, struggling to communicate how its role adds value to services. This lack of business engagement, coupled with a scarcity of practical advice on how to successfully develop and use a service catalogue to

drive transition explains why the traditional approach is flawed and why implementation is not widespread.

The traditional approach

The majority of service catalogue implementations are initiated by IT groups with the objective of automating request fulfilment to create efficiencies and reduce costs. The service catalogue is designed from an IT perspective, based around IT services, with customers having little input or no visibility during the design phase. IT groups can spend months, or even years, creating complex service hierarchies and technical service categories like 'database tuning' that have no place in a customer or user-facing service catalogue. The output from these initiatives usually takes the form of a service request catalogue, which enables users to 'place their orders' but fails to define the business outcomes the service supports or the value that IT is adding. This may be good enough, depending on your circumstances, but if you want to communicate IT value and use it to drive transition, you'll need to go further.

The traditional approach will work if your IT group has a business relationship management function - and the resources and skills you will need to tackle the Service Strategy, Design and Transition lifecycle stages. If those are absent, it may be worth taking a look at an alternative approach to service catalogue.

An agile approach

In an IT context, the term 'agile' simply means using a different approach to managing IT and software development teams, with the aim of delivering the outcomes promised to the customer in a more tangible and timely manner. Agile doesn't simply mean doing things faster. It also involves minimising wasted effort when introducing new (or changing existing) services and delivering projects. The design and implementation of your service catalogue is a perfect candidate for an agile approach.

When using your catalogue to drive transition, consider breaking it down into epics, stories and sprints so you can plan, track and implement new, changed and existing services more easily.

We've explained that the traditional approach to service catalogue often has little customer involvement, but even if the customer is engaged during the up-front requirements capture phase, the design phase typically has very little customer involvement. It is only when the service catalogue goes into the testing or production phase that we discover that it doesn't meet the needs of our customers. The result is poor adoption and we have to invest considerable time and effort to bring things back on track. Failure is often blamed on poor analysis of requirements; the reality is that customers can't be expected to know exactly what they want until they have had exposure to, and experience of, a version of the deliverable.

Through iterations, you can review and develop your catalogue incrementally each time you go through transition. That way, you get to understand and improve your services to your customers much faster than with the traditional approach.

Agile tackles this issue head-on. It's a collaborative, iterative approach that engages users and customers throughout the entire design and transition process, encouraging them to shape the service catalogue by working with, and providing feedback on, each iteration.

Although there are no shortage of methods, if you're new to agile, Scrum may be a good place to start. Scrum takes a top-down approach that translates the vision into value through user stories. User stories are implemented in iterative sprints to deliver results and encourage customer feedback that keeps the momentum going.

Before you start you will need a vision. This could be something as simple as "We offer complete transparency of the services we

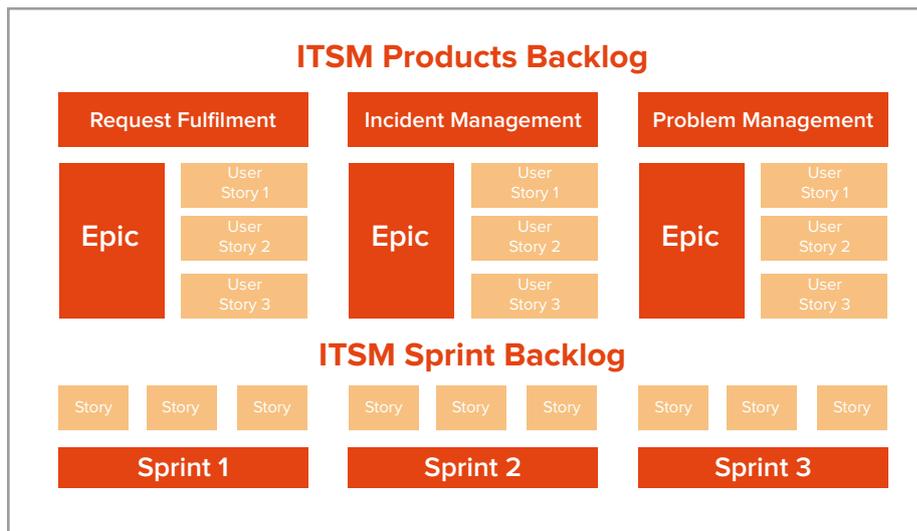


Fig 1: An agile approach to service development

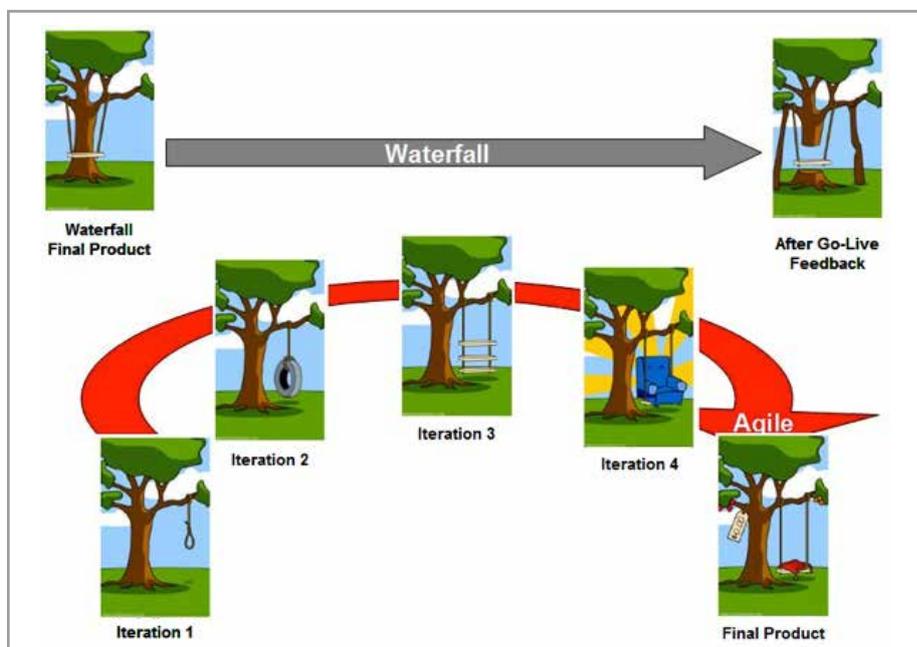


Fig 2: The benefit of multiple iterations

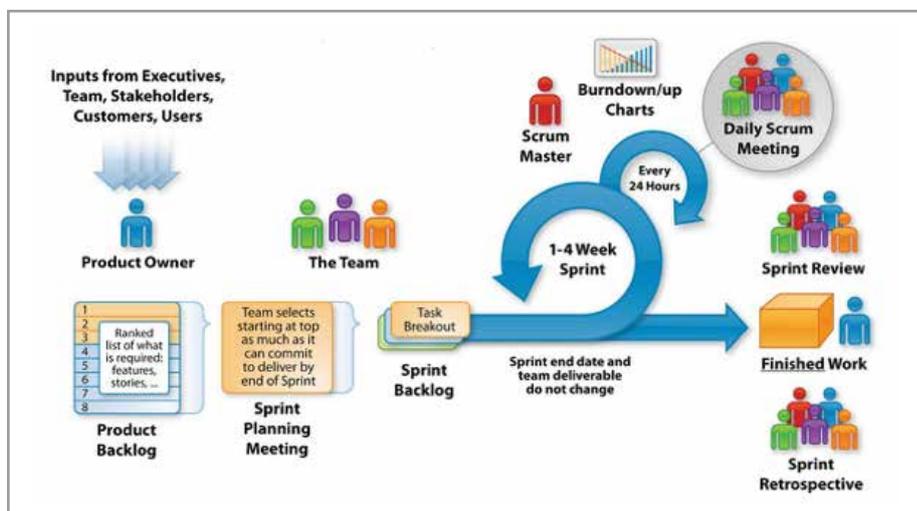


Fig 3: Incorporating Scrum into an agile approach

Two-speed transition: the service catalogue

provide to our customers, with full visibility of cost and the value that IT adds”.

Initially you'll only need to capture your services a high level, and the beauty of this top-down approach is that you'll do this in collaboration with your customers, with an expectation that your service catalogue will evolve during delivery.

Other benefits of this approach include increased transparency of work, visibility of progress, ability to show value early on, and a sense of achievement for everyone involved. Additionally, the more times you revisit and update the catalogue, you can drive better transition by learning from what works and what you already have in terms of services, rather than starting from scratch each time.

There are many agile methods, but Scrum might be a good starting point...

Get on the same page

As a footnote, if you ask ten people to explain and define a service, an SLA



Vawns Murphy is Problem & Change Manager at Micro Focus and Patrick Bolger is Chief Evangelist at Hornbill Service Management. Here they represent the ITSMF UK Service Transition SIG. For the full version of this article, covering two-speed release management, service catalogue and early life support, check out the ITSMF UK website.

and a service catalogue, you will get ten different answers. Therefore, it is essential to get everyone involved up to the same level of understanding around simple definitions, as this can cause a lot of delay through unnecessary disagreement and misunderstanding. Although not an exhaustive list, the table below provides some examples:

Taking an agile approach to service catalogue means that, because of the benefits involved such as the speed in getting information out quicker, the feedback loops which can be acted upon are much more likely to have accurate information on services to allow you to drive effective transition with confidence.

Term	Definition
Service	A bundle of activities (IT, people and process) combined to provide a business outcome
Service Offering	A specific task offered as part of a service (e.g. create / change / remove / retire)
Service Catalogue (SC)	A framework of services and service offerings provided as a multi-level set of information, including:
• SC User Request Portal	Front end user friendly interface for users to get information and fulfilment of services and offering (e.g. like Amazon)
• SC Business View	Outputs intended for business customers / users. Identifying service performance, supply and demand (e.g. reports and scorecards)
• SC Technical View	Technical and organisational information to support the IS/IT organisation in delivering the services and offerings (e.g. technical and process documentation)
Service Attribute	Features / Values recorded as part of the service (e.g. owner, customer, components, SLA)
Service Portfolio	The Lifecycle management of services from pipe line through to retirement. "Service Catalogue" is the live service status.
Service Level Agreement (SLA)	Written measurable target for service performance and delivery agreed with customer
Operational Level Agreement (OLA)	Internal SLA to define inter-departmental responsibilities required to meet customer SLAs

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SUCCESS

SOLUTION

PROBLEM

Next steps for SIAM implementation

SIAM SIG chair Steve Morgan provides an update on recent guidance developed by our newest special interest group.

About 18 months ago, ITSMF UK identified a significant demand for information on SIAM, and a corresponding gap in the resources available to members. Demand was coming from service providers, customers, and consultants, many of whom were hearing SIAM terminology being used in the industry without really understanding it. The author was asked to look at the idea of setting up a special interest group focusing on this area, and we held an initial meeting for members at HPE in London to gauge the level of interest in collaborating on new material.

The first meeting attracted about 70 people. As far as I was concerned, a SIG should be developing new content and providing thought leadership, so we made it clear from the outset that SIG members would be doing rather than listening.

As a result, we lost a few members who couldn't commit the time or who didn't feel they had experience to share, but most of those who attended at the beginning stayed to help. We set up a number of working parties, each with a specified area of focus, who started to meet by phone on a weekly basis and to report back every couple of weeks to the whole group. We still follow this structure.

As most of our members are consultants and service providers, rather than practitioners, we initially found ourselves overthinking our task – revisiting definitions and processes rather than moving forward. SIAM is a very

broad topic, and we had several attempts at dividing it up into meaningful sections so that we could start to develop useful content on each.

It's safe to say that it hasn't been as easy as I had expected, but I'm delighted with the quality of our output to date. What we have delivered so far is the collective views of user organisations, consultants and service providers who have been involved in live SIAM programmes. This guidance has been consolidated into a large list of considerations for anyone starting out in service integration. We have broken it down into the stages of a SIAM lifecycle, from business case development through to formation of the programme team, to design, build, implementation and operation. Each of our considerations for newcomers comes under one of these headings.

The next step will be to expand each area with further papers and supporting collateral, digging deeper into our top-level considerations. We have a couple of papers in development at the moment focusing on the business case (what should be in it, how to put it together) and the financial case and getting the business on side.

SIAM should be viewed as a significant change to an IT operating model so it is quite expansive, covering the whole customer experience from the help desk through to project delivery, business as usual and service delivery. We're also looking at SIAM

strategy and the options available here, and again we'll have some deliverables to share in the coming weeks.

To access our SIAM Considerations download, discussed above, visit the website at www.itsmf.co.uk/SIAMcontent. If you're embarking on a SIAM programme, the paper covers the costs, constraints, dependencies, pitfalls and risks that need to be borne in mind, based on the experiences of those who have lived and breathed SIAM implementation.



Steve Morgan is Director of Syniad IT Solutions, and has more than 25 years' experience in IT, in both operational and consulting roles. If you would like to be involved in the SIAM SIG in any way, please contact Steve via the ITSMF UK office.

ITSM is at a critical crossroads, which requires organisations to put broader skills and higher levels of professionalism in place. **Barclay Rae** explains.

Revisiting ITSM professionalism



Here is the dilemma – you need to hire a new person into an ITSM role. You have two candidates with apparently identical qualifications and experience from their CVs - in terms of technical capabilities and ITSM certification.

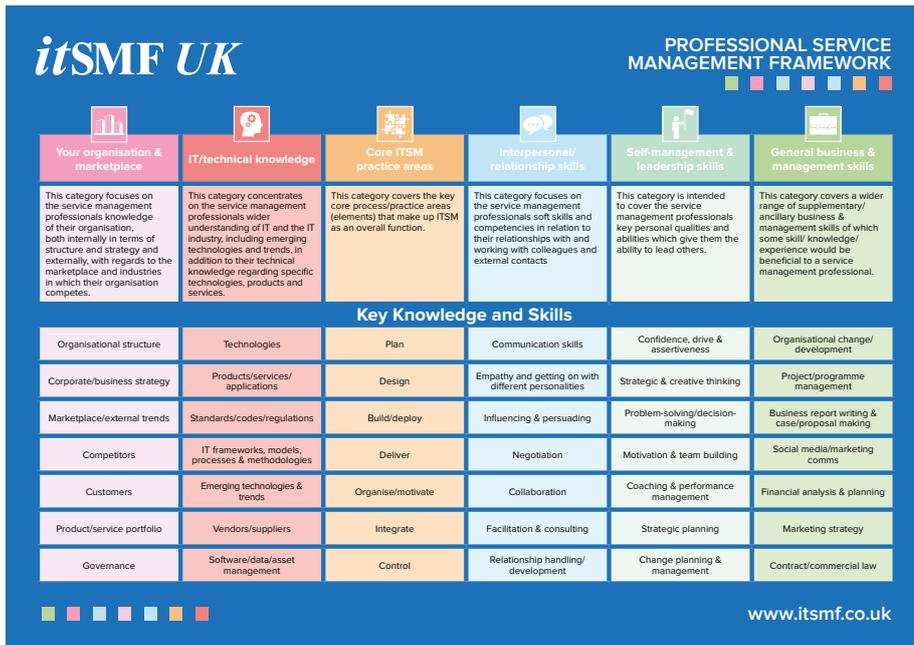
Both have the relevant technical requirements for the role, and both are 'ITIL experts'. Which one do you hire? The answer is obvious – most people would hire the person with the better communications skills, business knowledge, management and leadership capability.

Whilst we know this, too much time and emphasis in the recruitment process are still spent on checking and evaluating people for the first set of skills, and not enough on clearly identifying what is needed in other areas – i.e. 'soft' skills.

Whilst the technical and process skills are taken for granted, it is the human interaction, organisational and business capabilities that are really desirable. Indeed, why do we describe these as 'soft' skills when they are more challenging and difficult to achieve than the hard ones?

We talk about 'soft' skills as if these were easy, fluffy, inferior, or unimportant. Here are some examples:

- Influencing and motivating difficult/resistant people
- Managing/leading teams and individuals
- Dealing professionally with varied issues and demanding customers
- Being able to calm down angry/difficult people
- Understanding how IT really supports and drives the business
- Recruiting and developing a wide cross section of people
- Successfully negotiating contracts and managing suppliers
- Building relationships with a wide cross-section of stakeholders – people and teams
- Managing budgets and finances effectively
- Understanding and working to commercial and organisational constraints
- Appreciating the value of communications and content that simply achieves its goals without being over-engineered or too technical
- Delivering reports that are read and used for decision support



“At ITSMF UK our own new competency framework is built around the idea that the complete professional must exhibit skills and competencies well beyond IT and ITIL.”

- Getting engineers to follow procedures correctly!

It is often extremely difficult to find the right people with these competencies – regardless of their technical experience or ‘badges’ of achievement. For many people working in IT and technology, these capabilities are very challenging – and not the reason they were attracted to IT in the first place.

The simple fact today is that IT and ITSM professionals need to encompass a broad set of skills and capabilities in order to do their jobs. IT is a supply chain/retail ‘business’ in its own right now which requires different skills and levels of professionalism – as is the case with any developing discipline and industry.

Happily this challenge is recognised by many industry bodies and the need to develop people is now included in several industry approaches. Here are some examples of industry models that recognise the human element and the need for ‘soft/hard’ skills:

• PSMF (ITSMF UK)

At ITSMF UK our own new competency framework is built around the idea that the complete professional must exhibit skills and competencies well beyond IT and ITIL.

• BRM (BRMI)

The BRM Institute model reflects levels of sales and relationship maturity - ie from order taker to strategic partner. This requires a number of key ‘soft/hard’ skills.

• ITIL Practitioner (AXELOS)

The latest ITIL guidance reflects the need for organisational change management, using techniques to build consensus and buy-in, as well as areas such as communications and analytical skills.

• SDI – Service Desk Certification (SDC)

The standards for SDC involve a number of views and analysis of people, skills, personal and career development, individual and team morale.

• DevOps

This is not simply a cool development approach. Rather it should be seen and delivered as a collaborative and all-encompassing way of working that brings operational and development people together, in a culture of mutual trust and respect. DevOps reflects the need to work and communicate properly and professionally with other people.

Summary

As we introduce more and more automation and robotics into our business and IT working lives, there is a need for a greater focus on human interaction when it is needed. So, person to person interactions may be more limited and irregular experiences. As such they will have more positive or negative impact when they occur, and need to be conducted at the highest level of professionalism.

It is not acceptable – and highly risky – to leave these interactions or ‘moments of truth’ to chance and at the mercy of technical people who perhaps don’t have the appropriate means of communication to fully deliver this to expectation. Current business and industry demands mean that the customer experience must be properly managed and professionalised.

IT and service management are at a critical crossroads. There are many challenges to traditional frameworks and ways of working beyond ITIL – many of these (such

as DevOps, BRM, SIAM and IT4IT) promise great results and should be embraced and considered as options. However, there are no silver bullets and success is always dependent on people and the way that they interact with each other.

We need to recognise and assign more value to people skills – in IT and beyond. We need to improve at communicating, influencing, negotiating, managing, leading, promoting, marketing and many other non-IT functions. This is part of IT growing up.

So we need to recognise, celebrate, promote and support ‘soft’ skills, recognise them more openly, and build them into our to recruitment, management, development and recognition processes.

Despite the rise of the robots, people are still – and will continue to be – our greatest assets. We just need to recognise this and take appropriate action now to build professionalism for success.



Barclay Rae is CEO of ITSMF UK

With the rapidly changing landscape of service management, people skills are more important than ever. The ITSMF UK Connect team offer some advice for those seeking the next step in a 'well rounded' ITSM career.

New skills for tomorrow's service managers

It is widely known that service management revolves around not just technology but also relationships; the majority of people who succeed in service management are there because they want to help people and they keep the customer at the heart of their decisions and working practices. Those attracted to a career in ITSM typically demonstrate a range of 'people' skills that make them suited to a role that bridges the sometimes disparate worlds of business and IT.

But with the process-centric approach of ITIL and similar frameworks, these skills are often eclipsed. ITIL is the oldest and most widely adopted ITSM framework but it could be accused of being quite rigid in terms of the functions it outlines and the value put on those functions. Beyond a sound understanding of processes such as problem, incident or change, there are many people skills and capabilities which will contribute to making an ITSM professional an outstanding leader, strategist or negotiator within the

business – measurable traits and experiences which should be taken into account when recruiting for a role.

A problem manager can be measured against more than their ITIL problem management knowledge and experience. A great problem manager will have other skills that will benefit the business such as negotiation, leadership, motivation, communication, team building and more. Service management is evolving beyond a series of processes for IT and is becoming increasingly slanted towards people and business.

This change is reflected in the new Professional Service Management Framework (PSMF) from ITSMF UK, designed to recognise the increasingly broad focus of the service management profession beyond the core processes. PSMF identifies the competencies that are demonstrated by individuals working in ITSM at all stages of their careers, highlighting areas of particular strength as well as those where further

development might be required.

A recent research paper¹, sponsored by ITSMF UK Connect, further highlighted the need to complement technical knowledge with soft skills. The authors found that:

- One of the three top traits in the hiring process of senior service management professionals is to be a 'people person', with their number one priority being to deliver first-class service to the customer.
- Another top trait was to be a 'problem solver', as to be successful in service management you need to be adaptable and have the courage to think outside the box to ensure the best solution is reached.
- The third top trait for senior ITSM recruits is to be 'commercially aware'; service management is the bridge to the business, and understanding the perspective of both the business and the IT function requires skills that are in short supply.

CONNECT

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www.itsmf.co.uk/connect

Broadening your career path

For a successful career in IT service management, it's advisable to choose an area of specialisation but then to take every opportunity to bring more to your company than theoretical skills. By being conscious of the additional benefits you can bring you will naturally hone those areas of competency. The PSMF framework provides a matrix of skills and attributes, highlighting areas that you can develop beyond ITIL; by working towards these additional skills and finding opportunities to develop them, you will become more capable and add greater value as a service management professional.

This new way of looking at service management is being embraced by service management veterans and new professionals alike. Tony Price from HPE, also quoted in the research paper, told of his involvement in the IT4IT framework. Tony has worked in service management for over 36 years and was one of the first adopters of ITIL; his involvement

in and enthusiasm for IT4IT is testament to the evolution of service management and the readiness in the industry to embrace new frameworks and skill-sets.

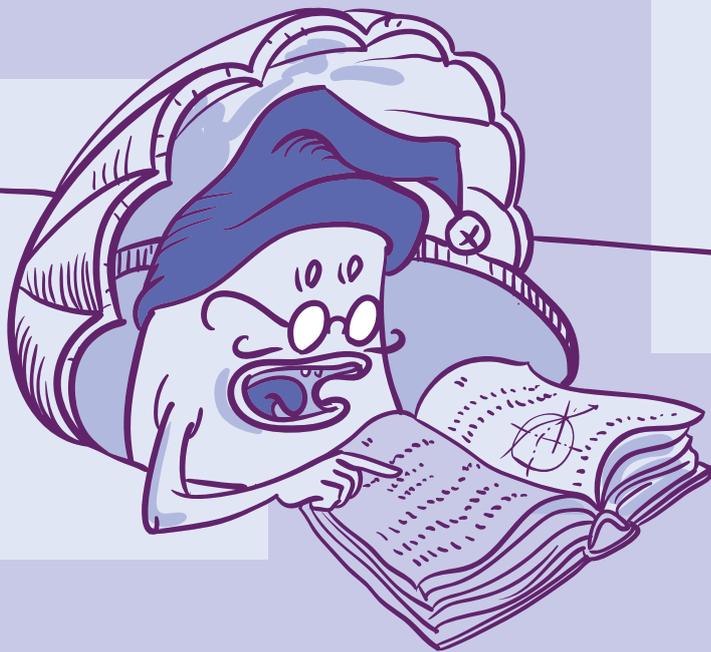
One thing is for certain: ITIL and other frameworks do not create excellence, people do. If you lead from the front and work to continuously add value for your customers, people will notice and want to be a part of it. Culture is imperative to creating service management excellence. All the strategy in the world will make no difference if you do not have a solid culture of excellence... a wise man once said "culture eats strategy for breakfast".

One essential element of a people culture is eradicating the blame game that cripples so many organisations. Let's be honest, we are all human and will make mistakes along the way, but that does not mean you (or ITIL) have failed. Failures create a space for growth and improvement, so roll up your sleeves and get your hands dirty!

This new way of thinking about the well-rounded ITSM professional benefits individuals and organisations alike. Individuals can track their personal growth and career development plans via traditional routes and established technical qualifications, but people skills are just as valuable and not quite so easy to measure.

PSMF and Connect from ITSMF UK can help employers understand how candidates measure up against the skills that will add real value to their business. These skills can only be developed through on-the-job experience. By having this additional information to hand, as well as the usual CV and interview, an employer can enter into a relationship with a new employee with greater confidence that they will meet and surpass the needs of the business.

1 IT Service Management Leadership White Paper (<http://www.cranfordexecutive.com/>)



The ITIL Practitioner and the open book

The ITIL Practitioner is the first significant addition to the ITIL guidance since 2011, and brings with it a new style of qualification. Barry Corless offers some practical advice on tackling the Practitioner challenge.

Early in 2016, AXELOS released the ITIL Practitioner qualification. It was a landmark moment for the ITIL scheme in more than one way. Firstly, it dips a toe into the 'how to implement' water where all previous ITIL V3 and ITIL 2011 courses have focused on what ITIL is. Secondly, it is the first ever ITIL qualification to use the open book format.

This allows students to use the official ITIL Practitioner publication to help answer the questions during the examination. However, the term 'open book' is not as straightforward as one might think. Having lectured the course and written a number of the exam questions, here is my guide to 'opening the door to the open book exam'.

Tip 1: Understand the rationale behind an open book exam

Open book exams would be useless if they relied on simply 'learn-and-regurgitate'. It's

extremely unlikely you will find the answer word for word in the text book. The ITIL Practitioner is meant to teach students how to take information and apply it in a thoughtful manner. This doesn't mean that one or two answers can't be picked up directly, of course, and questions asking about definitions or perhaps the value of an activity may call for the verbatim text.

Tip 2: Remember this is a restricted open book exam

In the restricted exam the open book material is limited to the official ITIL Practitioner publication. The syllabus and exams are written to interpret the guidance in that publication. This means memorising is largely unnecessary. However, it does not mean you do not need to study; far from it. Your focus should shift to understanding the material rather than simply being able to repeat it as in the Foundation. You will be asked questions like, "Explain the BEST way X applies to a particular situation". You should make sure you truly understand the material before attempting the exam.

Tip 3: Locate and mark key information beforehand

Organise the textbook beforehand to help you locate key information quickly and easily. The AXELOS exam regulations state:

"Candidates will now be able to use an annotated copy of the ITIL Practitioner guidance in the open book exams; additionally for ease of reference, candidates may also tabulate sections of the manual (these markers are to be used for tabbing purposes only and must not contain any notes written on them). This best reflects the way the publication is used in real life, and supports the practical nature of the exam. Please note however, extra loose leaf papers are not permitted."

So get out your highlighter and mark key terms and other difficult-to-remember material that you might need to draw from. You can flip through your book and easily spot the highlighted sections during the exam. Consider making the margin notes that you normally make on the training provider's manuals in the text book instead, as you can take this into the exam. Highlighter pens and multi-coloured sticky notes specifically designed for marking pages are particularly useful.

Tip 4: Use the book in the sample exam questions

If you are going to use the book in the exam then use ONLY the book when answering the sample questions. There

is simply no better way of promoting your understanding of the course material and the layout of the manual. Amongst the areas where this works particularly well are the process questions. For example, you might be presented with a question that follows the timeline of stakeholder management. Find the stakeholder chronology in the text book. Work out where the scenario has placed you and where the answers fall in the timeline. They will almost certainly all be part of the process but only one is the right NEXT stage. Another area where the book helps tremendously is in the metrics questions. There are so many methods of balancing metrics examiners can look at (outside in, inside out, balanced scorecards, metrics trees, etc.) that remembering them all is virtually impossible. Using the books to understand which balances the examiner was focusing on makes finding the correct metric or combination much easier. You might also be really lucky if the examiner used an example metric in the right answer that's quoted in the book! Remember, AXELOS insists that examiners can point to the rationale in the text.

Tip 5: Team up with other students

Study groups are great for any type of exam, and they can be especially helpful for an open book. Discussing and debating where to find the relevant material in the manual can be a useful learning tool. This shared experience quickly helps you learn how to apply the information you learned. Of course, this is only during class and not in the exam!

Tip 6: Focus on the important things

Pay attention to where the most focus is placed during your class. The syllabus for the course defines the number of questions in the examination and your lecturer should help by focusing you on the important areas. If something is written on the board, repeated, or discussed for an extended period it will probably show up on the exam.

Tip 7: Stay calm

Exam anxiety can always affect performance, so make sure you know good strategies to keep your nerves in check. Studying in the hour before the exam rarely makes any difference and will probably end up freaking you out. Use this time to take care of yourself. The old examination staples are still relevant:

- Know the time and place of the exam
- Give yourself extra time to get there
- Running late can increase anxiety and affect performance (that email to your boss can wait - tell them I said so!)
- Get a good night's sleep before the exam

- Anything that affects you physically can affect you mentally, so make sure you're rested and refreshed.

Tip 8: Time management

There are 40 multiple choice questions to complete in 1 hour 45 minutes. Be aware of how much time you have and take a quick moment to calculate roughly how long you should spend on each question. I'll do the first bit of maths for you: that's 2 minutes 37.5 seconds per question. You should be familiar with the case study from your course or other pre-exam study so don't spend too much time re-reading it. You should not be afraid of answering any questions you can without the book first. This gives you more time with the questions where you might have difficulty and need to consult the text. Remember that the questions will always follow the same structure as the sample papers in batches of six upwards, and will be on the same themes as defined in the syllabus (communication, metrics, etc.). This means that if you have a strong topic you can jump to that first.

Tip 9: Take the exam when you feel ready

Many students studying with us at Global Knowledge now choose to take advantage of the virtual learning services that we offer to study remotely (other training organisations may have similar services so make sure you check). The obvious implication is that unlike their classroom based counterparts they are less likely to take the exam immediately after the course. This should not be seen as a negative as the open book format means retention of 'understanding' is more relevant than retention of 'fact'. Remote proctoring/ invigilation of exams means that it is much simpler to take the exam at a time when you are ready. My advice is to plan your time carefully and take the exam when you feel you understand what has been delivered.

I hope to see you on an ITIL Practitioner course soon. Good luck with your studies!



Barry Corless is Business Development Director for Best Practice at Global Knowledge, chair of the ITSMF UK Problem Management SIG and an ITIL Practitioner examiner for AXELOS.

TRIM: the Rational IT Model



Pelle Rastock describes a new integrated approach to delivering effective service management.

Most IT organisations use ITIL as a source of best practice for IT service management, but few achieve a truly integrated solution. One of the reasons for this is that they use ITIL as a model, not as best practice that needs to be adopted and adapted to the specific business.

Another reason why newcomers in particular fail to get real value out of their IT service management initiatives is that they often reach too far. Most of the books or models used describe the perfect scenario. It's like taking the playbook from a world leading soccer team and using it to teach children. Everything in the playbook is correct and truly the best way of doing things, but children need to learn the basics of soccer before they can evolve to a team.

As long as we talk about team sports, everyone agrees that this is obvious. But within organisations, we often take a state of the art playbook and give it to those who are starting out in service management and expect them to understand the game. Delivering IT services is a team sport and we need to understand the basics of the game before we can excel.



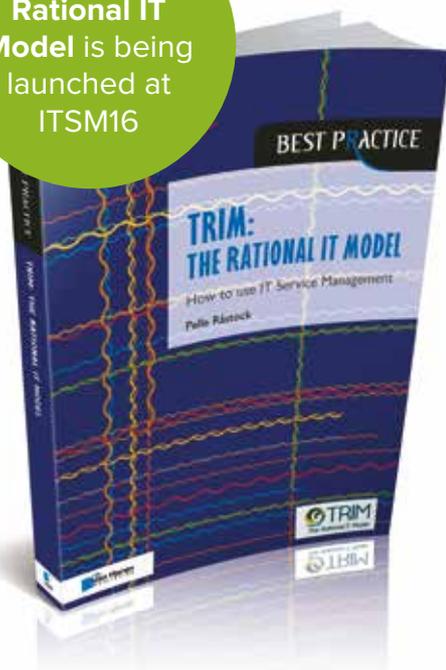
TRIM: The Rational IT Model was created out of years of experience by service management consultants and IT organisations with the purpose of explaining ITSM in a way that brings all the key concepts together in a manageable way. Offering a governance model combined with a complete service structure, TRIM gives organisations the

tools they need to adopt effective service management from day 1.

TRIM takes its starting point from the existing business. Everything needs to be connected to an organisational unit and to an accountable role. All employees need to understand their contribution to the delivery of an end-to-end IT service, as with the playbook analogy. And when this is in place, processes will only be a tool for making essential activities easier to perform, instead of being perceived as an administrative overhead and maybe even an unnecessary evil.

model and its supporting materials. TRIM is community driven by its members, whose experience will contribute to the future development of the model. The members also consist of tool vendors, course providers and consultants who have developed a wide range of TRIM-specific tool configurations, cloud services, courses and workshops to make it easier for organisations to adopt the model.

TRIM: The Rational IT Model is being launched at ITSM16



The purpose of TRIM is not to replace ITIL or other frameworks, but to be a way to get IT service management adopted within an organisation. The model is complete and describes the parts in such a way that you can understand even without prior ITIL knowledge. The model consists of the fundamentals, the very basics, of IT service management. And the aim is that when this is in place and working, your organisation will be ready to adopt and use more advanced frameworks and models such as IT4IT, DevOps or the more esoteric processes in the ITIL Lifecycle. It can also be used as the basis for an ISO/IEC 20000 certification.

The TRIM model is managed by the OpenTRIM.org community, with a mission to continuously improve the reference



Pelle Råstock is Product Manager and Instructor at Aim 4 Knowledge AB in Sweden. To find out more about TRIM, check out Pelle's new book 'TRIM: The Rational IT Model', which is being launched at ITSM16 on 21st November.

25 years of Conference

- or Unreliable Memories of a Conference Hack

When he attended the inaugural ITIMF (later ITSMF) event at Stratford in November 1992, **Aidan Lawes** had no inkling of the huge role that conference would play in his life over the following years. Here he considers the highs and lows of 25 years of conference activity.



*it*SMF UK

Having been introduced to ITIL (or GITIMM as it was initially called) early in 1991, I had attended a variety of events promoting it, embarked on the Manager's Certificate and introduced ITIL training as a new revenue stream within ICL. So attending the ITIMF conference was the obvious next step.

The two-day gathering was a hugely enjoyable event, with some really interesting sessions and a splendid evening dinner, with the Brummie ex-Air Traffic Controller David Gunson as the speaker. I often remind my son-in-law (a commercial pilot) of David's definition of a successful pilot – one who has logged the same number of take offs & landings!

While the set-up of the session streams was not dissimilar from today, the exhibition was very different, consisting of a series of white cloth-covered trestles and only a couple of companies with 'exotic' pop-up displays – truly low-key.

One differentiating factor was that delegates' partners were able to attend for a nominal fee. For many people like me who spent large amounts of time away from home on business, this was a real positive.

Volunteering can be dangerous

At the event, I offered my services as a volunteer and soon found myself on the conference committee with responsibility for sorting out the exhibition for the following year. In those early days, with only a skeleton support staff in the Norwich office, a much heavier burden fell on the volunteers. We were, of course, service management enthusiasts with expertise in a variety of areas – but almost exclusively related to IT, not running events.

As we had committed to the Brighton Metropole for 1993, I chose a company based nearby who were able to provide a range of services, not just in building a shell scheme for the exhibition but also handling the set design and build for the conference stage and all the AV across the event. This partnership worked well and continued for many years, with them growing alongside us.

For that 1993 exhibition, I arbitrarily followed the Henry Ford model with a shell scheme of identically sized pitches, although a couple of exhibitors chose to take more than one pitch. The following year we were able confidently to offer not just a shell scheme but also free-build space for those with bigger stands in mind.

Most of the seeds of the future shape of the conference were sown in those first two years: a focused, multi-streamed conference programme; a professionally built and managed stage set; an attractively priced and designed exhibition space; selected guest speakers and evening entertainment; a unique selling point in the partners' programme.

From 1995-98, I was chair of the conference committee and found myself involved in far more aspects of organisation. Several weekends were spent up and down the country from Glasgow to Torquay, searching for suitable venues for the growing event.

Luckily for my marriage, my family was able to accompany me on these trips and they got some sight-seeing in as I attended various meetings. With the event growing year on year, it soon became apparent that there weren't many options open to us if we wanted to retain the character and shape of the conference. At the time London was too expensive, and beyond that, the Metropole hotels at Birmingham and Brighton were the only venues that could provide all the facilities we required. And so, for many years, these became our homes. From 1999, when I took on the full-time role of CEO, my involvement became even greater as we expanded the office and took on much of the work that had previously fallen on volunteers.

So what has changed over the years?

By and large, the watchword was incremental change – if it ain't broke, don't fix it!

I was fortunate to attend many events globally and most countries seemed to emulate the UK, but I did keep my eye out for any ideas that we could borrow – I certainly cast envious eyes over the plethora of venues the USA had to offer. We also reviewed the feedback from delegates and vendors to ensure we continued to offer the best event possible. But there have been changes:

1. Financial

In the first few years, conference revenue represented over 80% of our total income, so its success was critical for our very survival. Cash flow was a real issue, since the venues typically wanted large up-front deposits, we had little track record to trade on, and many of the government departments would only pay after the event. David Wheeldon, in particular, became adept at negotiating a continuous holding operation.

By the time I retired after the 2006 event, the position was dramatically different. Our attendance numbers of around 1000 delegates and 90+ exhibitors meant that we were the biggest single event that the venues were hosting and they bent over backwards to serve us. Revenue from the event exceeded £1 Million, but represented only around 40% of our total income.

2. Outsourcing activities

Volunteers were absolutely at the heart of everything initially. This included hours spent collating hard copies of slide presentations and inserting them into binders, then spending Sunday afternoon pre-conference stuffing the binders, exhibitor inserts,

delegate gifts, programmes, etc., into the delegate bags. (Most volunteers' partners were also roped into this.)

As the years passed, more work was handled by the full-time staff and, more recently, partially outsourced to outside partners, but a small core of dedicated volunteers have continued to focus on speaker selection and the overall shape of the event.

The awards

When the awards were introduced in 1999, there was some scepticism about them – especially with regard to the Lifetime Achievement award. Much of this was dispelled when the first recipient was Paul Rappaport, who enabled so much from behind the scenes, and after whom the award is now named. The number of awards has grown and their presentation forms a significant feature of the gala dinner.

3. The international dimension

As ITIL and itSMF spread around the world, the number of international visitors to the event grew year-on-year. Many of the now existing chapters saw their genesis in early enthusiasts attending the UK conference.

4. The duration

From year 2, it was a 3-day event, whereas for the last few years it has reverted to 2 days.

5. Partners' programme

As economic conditions and corporate culture changed, it became impossible to maintain the partners' programme. Some had always seen this as an anomaly and a lessening of professionalism, while for others it was both a civilizing touch on the evening activities and a gratefully embraced benefit.

What's constant?

1. The ethos

The conference is the key opportunity for vendors and users to come together to share knowledge and experiences, form and maintain relationships, and celebrate success stories within the industry. And if, along the way, some fun can be had – then it's win/win for all.

2. Speaker challenges

Getting the right speakers and then managing them is always a time-consumer.

a. The pros

For many years, we started the conference with keynote speakers whose presentation had some relevance to our industry, even if slightly tangential at times. There would then be an after-dinner speaker or entertainment following the Gala dinner – in

the latter years also presenting the awards. And finally, for a closing speaker we sought someone with an inspirational and upbeat message to send delegates away on a high.

When I look back through the records what strikes me most is the eclectic mix of authors, academics, business people, celebrities, futurologists, politicians and sportspeople we managed to engage. Most of them delivered the goods, some exceptionally, with a thankfully small number of disappointments: a professional comedian who wasn't funny; a keynote speaker who was rewriting their session five minutes beforehand; a celebrity who tried too hard; another who had an off-day.

b. The amateurs

Regardless of the volume of submissions, the committee had to go through all the synopses – of wildly varying quality and quantity – and make an initial judgement on suitability.

Once chosen, getting some speakers to deliver their promised slides was a battle. Occasionally, seeing the enormous mismatch between the synopsis and the content delivered led to some delicate conversations. Although the process was refined over the years, this is one area that remains challenging every year.

Even then, speakers could blindside you with last minute cancellations, changes of job (meaning change of topic or presenter), or turning up on the day with a 'revised' presentation.

Although the quality of some sessions was variable, there weren't many real duds: the occasional sales pitch, a Belgian academic with 100+ acetates for a 40-minute slot. A number of speakers have returned multiple times and it has been fascinating to watch individuals grow over the years, from reading scripted talks to delivering effortless, flowing oratory.

3. Ivor Macfarlane

Ivor was one of the CCTA reps who visited me back in 1991 and I see he's speaking at conference again this year. He comes up with some marvellously inventive takes on ITSM and the world!

On a personal note

In conclusion, I'd like to indulge in some nostalgia and mention some of my own highlights over the years.

Favourite keynote speakers

While there have been many whose sessions I have thoroughly enjoyed - Will Carling, Barbara Harman (1st woman Concorde pilot), Dame Tanni Grey, Professor Ian Angell from LSE, the anarchic Geoff Burch, Sir Clive Woodward - my all-time favourites are:



- **Helen Sharman (1995)** – the first British astronaut (who went into space with the Russians) and the raw emotion in her voice as she relived her trip and how it still resonated so strongly with her.
- **Mark Gallagher (2001)** – Head of Marketing (or “The man in charge of making things happen”) from Jordan F1 with his amusing yet relevant discourse on the increasingly technological challenges they faced in searching for success – and yet how often it all came down to a human view. (People really do matter!)
- **Richard Noble (1997)** – who arrived virtually straight off the plane following the breaking of the land speed record with Thrust SSC, bearing reels of raw footage which the technicians hurriedly sampled and spliced for his presentation.

After dinner

From a crowded field – Frances (“Cricket, Bloody Cricket”) Edmonds, Michael Dobbs, The Three Tenors, John Inverdale (for his masterful handling of an over-eager conference chair) - the two who stand out the most in my memory are:

- **Dillie Keane (2002)** – from her opening, lying flat out on the baby grand, through the witty, provocative and side-splittingly funny repertoire (“I want to be a lesbian”; “I'm in love with the Pope”) to the encore in praise of Little Chefs (in a Scottish accent), the audience were hooked.
- **Barry Cryer (2004)** – a genuinely funny speech, but even better value in the bar afterwards as he stayed with us for hours, and the delightful poem he sent us later. A gentleman and a really entertaining person.

And finally

As I prepare to attend my 24th conference (sadly I missed last year's due to a diary clash), hazy memories surface – inspiring speakers; the buzz in the exhibition; fish and chips at 3 a.m. on Brighton seafront; Tassos Symeonides and Paul Rappaport in a frantic

bidding war for stuffed toy; Fox IT and Pink Elephant competing to sell raffle tickets; meeting new and interesting characters; remonstrating with noisy hotel staff with limited English; the ever-present and cheerful Monty; late nights in the bar (including sad figures still talking work!).

It was hard work, often stressful, but the buzz from delivering another stunningly successful conference always over-rote everything. As I repeatedly told the staff, “We see and hear of all the little glitches, but 99% of the attendees are blithely unaware and merely having a thoroughly enjoyable and educational experience”.

Attendance nowadays is much less stressful for me – and I certainly see more sessions –but it is still one of the first dates into my calendar.

I hope to see many of you at the Sofitel this year!



Ex-CEO of itsMF, Aidan is now mainly retired, allowing him ample opportunity to keep fully up-to-date with rugby matters - especially the world-conquering All Blacks. He also finds time to contribute his experience as a volunteer for the National Trust.

ITSM and education: striking the right chord

Discussing the skills agenda in IT Service Management (ITSM) is more important today than ever. Educating young people and career changers and giving them the opportunity to learn about IT-as-a-Service is absolutely essential. The challenge for us as a profession is, how do we make this happen?

I have always had a grand vision of what was possible, ever since I first developed a masters programme at my university, but it really goes further back than that. When I

took my ITSM qualifications I could see the benefit of providing learning for university students. During my time teaching students I have not seen a significant increase in the overall size of the student body or the number of universities teaching service management. In fact I reckon that I am still one of only a handful of people in the UK who teach the subject as a dedicated IT Service Management academic.

I have witnessed many attempts to kick start

discussions; some have gone well, others less so. To me it is very frustrating as we generally seem no further along the path than we did a few years ago. There are, I am sure, a number of reasons for this, mainly (I believe) because we do not have a national imperative to drive this along nor an agreed strategy.

Evolving professionalism

ITSM is a combination of techniques and disciplines which collectively provide a





professional body of knowledge. The real challenge is that it is not recognised by education, nor is it embedded into the culture of academia. It does not have a 'presence' which goes beyond a handful of academics, like myself, who work in a small number of universities.

However, to provide the foundations for more structural change there are a couple of strategic questions we must consider. Firstly, how do we begin to 'appeal' to education? Secondly what government initiatives can we work with to ensure it fits in with the current economic trends and requirements?

One of the challenges for ITSM is that for decades there has been a lively training community and, as such, there was no nationally supported plan to deliver the material via mainstream education. There is, in my view, a very positive backdrop to this because at ITSMF UK we collectively respond to industry trends, and we are developing new products and putting the individual at the heart of what we do. By recognising the Young Professional we are creating the foundations of a profession which will encourage young people to engage with our industry. Many argue that it is important that we offer career guidance at the outset and provide meaningful support to those young people as they start their careers.

About education

In the UK, the National Curriculum drives what is taught in schools and changes have taken place to provide more IT-related subject matter for pupils in compulsory education. This is very encouraging for us in this debate. In higher education all subject disciplines are given advice about graduate skills and attributes by the Quality Assurance Agency (QAA). In further education, which is primarily

responsible for 16-19 year old learners, there are significant changes already to technology education which are supported by the Skills Funding Agency.

Sadly for us working in ITSM in higher education, the newly published QAA computing subject descriptors do not include IT Service Management. The descriptors mention 'complementary' subject matter, but they do not explicitly state what that is. The business subject descriptors (also newly published) concentrate on traditional business and management as you would expect, but with some significant changes specifically mentioned later in this article. That said, there is in reality a polarisation between computing as a science and business subject matter. There are historical influences which mean that the evolving nature of IT-as-a-Service as it does not naturally harmonise with recommended curricula design.

Creating a common language

My observations as a senior lecturer in ITSM in both of the universities I have worked in highlight the need for better communication between what we do in education and the ITSM industry. Educationalists (in general) do not 'get' ITSM. This is reflected in conversations I have had with many university colleagues at conferences and events. Questions are basically left unanswered as to whether it is best suited to IT or to business courses and where they can logically fit it in to what they do already.

So in order to develop a more melodious rhythm we need to encourage the development of a shared language. Surely, then, it would be better to subtly modify the sequence but without undermining the harmonics.

The business subject descriptors mentioned earlier have embraced digitalisation, rightly because businesses are increasingly dependent on technology. This is a theme and context worth exploring because it could provide a natural segue between what is currently taught in higher education and what is required for future graduates.

To do this we do need to think beyond individual universities, schools and training organisations and create an integrated and sustainable training and education roadmap. Of course at the heart of the roadmap must be the learner. This approach would be beneficial for a number of reasons. We can penetrate deeper into traditional education routes than we currently do at the moment; it would naturally lead on to providing the industry with a steady stream of young people; and it would foster an underpinning philosophy needed to support lifelong learning. I am sure, too, that there will be greater commercial opportunities if we provide a joined-up training/educational environment as the learner base would be wider.

To complement this, ITSMF UK's Professional Service Management Framework (PSMF) has identified a broad-based skillset which businesses have told us they require in addition to those competencies traditionally offered via ITSM training. I welcome this as a huge step forward, because it honestly reflects what skillsets businesses need from technologists. Also as many of these areas of knowledge are understood by traditional educationalists there is greater potential for integration. With PSMF, courses could be jointly accredited through education and ITSMF UK to add greater value for the learner and provide for better transparency.



ITSM in a digital context

If we consider using the UK Digital Skills Agenda as a working template, we might find that government departments and educationalists see where IT-as-a-Service fits in. This should influence and direct how we can then create a more inclusive training and education environment. Digital is everywhere, there is a huge energy and enthusiasm around it. In understanding where we might fit in ITSM we should consider what the UK digital skills agenda aims to promote. It considers learning from the ground up, which is underpinned by levels of achievements and recognised standards. It does not identify who should provide each level, although there will naturally be a 'best-fit' of who does so.

This approach, should we choose to adopt it, could add greater flexibility to what we do already and help provide foundations for structured allegiances between training providers and education.

If we similarly build from the ground up, we will be able to identify a cohesive schema around agreed skillsets which have a better chance of being more inclusive and sustainable.

The UK Digital Skills Agenda identifies three levels:

- Basic, which identifies the digital skills everyone needs to participate in a digital economy
- General, which identifies digital skills required for all job roles across the economy
- Advanced and specialist, which identify digital skills required for specialist digital roles.

[Source: UK Skills Funding Agency, February 2016]

For IT as-a-Service we could conceivably identify three or four general levels of achievement. The lower or basic skillsets could be aimed at pupils in schools, which have key knowledge sets identified. This could be built upon to offer more generalist and advanced levels, which might help us to better map levels and standards of existing qualifications and how they best fit in with mainstream education.

The beauty of an approach such as this is that it would enable learning across a range of providers best suited to that level of achievement. It would support the long view to learning in ITSM. For example, school pupils will require 'a basic knowledge' and be advised on a simple set of behaviours required to work in a digitally enabled service economy. Further up the learning food chain, and building up more advanced and distinctive knowledge sets, universities will be able to provide courses which concentrate on what they do best; the provision of broader analytical skills which reach a pinnacle at masters level and beyond as they focus on innovative solutions, peer reviewed research and reflective learning.

Important to this discussion is the need to embed practically orientated learning opportunities, much as we see in apprenticeship schemes to complement more traditional theoretical learning.

Accredited Training Providers (ATPs) will be better able to link what they do already with more progressive elements related to lifelong learning. They will also naturally be able to provide their valuable expertise to a national grand plan.

So what can we do?

I believe the first thing to do is to see if this is a workable idea and if there is an appetite

for it in the ITSM industry. We have been exploring a few ideas already about levels and knowledge sets to see if we are on the right road. The answer seems to be that it is technically feasible. After all, we are fortunate in ITSM that we already have agreed levels and standards to build upon, and now we have PSMF as well. The ultimate success (or not), in my opinion, is whether the industry as a whole accepts this as a logical approach and would support it. Whatever we do, we must be mindful not to create a thematic transformation, but one which modulates only insofar as it provides consonance to the melodies we already know and respect.

I would be delighted to hear from you and give you the opportunity to share your thoughts with me, so please contact me at sandra.whittleston@itsmf.co.uk



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Problem management and the ITIL Practitioner

The ITIL Practitioner was developed by AXELOS to help organisations increase the value they obtain from using ITIL by offering additional practical guidance in ways to adopt and adapt the framework to support the business. Indeed to be effective the guidance needs to be adapted to the many and various situations that service managers find themselves in. The ITSMF UK Problem Management SIG chose to consider the improvement of problem management capability and to produce specialised Practitioner guidance to this end. They met for a special research workshop session in Birmingham, the results of which form the basis of this article.

Despite being a key element of any service improvement programme, problem management is not going well for many organisations. ITSMF UK's own SIG-led 'state of the nation' survey, conducted two years ago using a simple CMMI-based maturity scale, revealed that only two organisations out of 25 had scores coming out at about 4, indicating good levels of maturity. Another two scored above 3 (control). **That leaves 80%+ of organisations with significant gaps to close just to reach the state where they have a repeatable approach to problem management.**

What this means in practice:

- Early warnings of avoidable incidents are ignored, leading to lost service availability
- Repeat incidents consume resources, and in some cases more than double the Incident management workload
- Reputational impact on the technology organisations that support the business.

Now we recognise that a maturity model result isn't everything. Some dismiss maturity models as irrelevant but categorising things

is part-and-parcel of business operations and IT is no different in that sense. We happen to believe that a repeatable process is the secret to managing expectations, automation, optimisation, customer satisfaction and many other goals besides.

The basics

Our solution (as members of the Problem Management SIG) is to take a number of elements of the ITIL Practitioner guidance and give them a problem management flavour, and that is the theme of this article.

Who are our customers?

One of the most fundamental questions to ask in the guidance is about understanding, who are the customers for your service or process? and how do they get value from the service you offer? The logic in doing so is painfully obvious... at least to the PM SIG. If we don't know who benefits from our processes and how, then we are effectively shooting in the dark when it comes to improving. The customers for the process really are diverse, with many of them also being suppliers. The

biggest surprise (though not to problem managers) is that the list is as long as the ones for the highly visible change and incident management processes.

Our customers are:

- All service management teams and disciplines
 - incident management
 - change management
 - service desk
 - risk management
 - knowledge management
- Other IT departments
 - technical resolver groups
- Business areas
- Sales managers
- End users
- Regulators
- IT relationship managers

The basics – how do they derive value?

Identifying those teams and individuals is only half the battle. Following our practitioner guidance we must try to understand how each group derives value. We recognised that value in a number of key areas:

- Fewer incidents and calls to **service desk**
- **Everybody** benefits from reduced risk of service disruption
- **Organisational learning** benefits from understanding of the reasons for disruptions
- **Those managing resource** benefit from clarity of issues, mitigation, available resolutions
- **Business areas and sales managers** will not have to spend so much time dealing with customer queries re service issues
- **End users** benefit from fewer service disruptions and improved service stability, and this should be reflected in improved customer satisfaction results
- **Regulators** should also see the improved service reliability, coupled with reporting and understanding of the reasons for disruptions.

KEY MESSAGE: *There's a difference between knowing who your customer is and understanding your customer. You need to do both. Most people spend the majority of their time on the former and too little time on the latter. This will ultimately result in failure. Why? If you don't understand your customer, you won't have full clarity on your value proposition.*

Creating the right culture

When asked about creating a good problem management culture we suggested the following traits with many agreeing that our first suggestion was mandatory:

- **No blame culture** – essential to success of problem management. Much of your work is done in virtual teams.
- **Tenacity** – problem management involves making and constantly re-committing to the decision to stay the course when related incidents are long forgotten.
- **Thick skin** – we live in a world that can provide ample negative energy. If all you do is dwell on that, you move further away from your goals.
- **Sense of humour** – humour is not only good for your health physically and emotionally, but it also reinforces the relationships that problem management requires in virtual teams under pressure.
- **Open minded** – opening up your mind to new ideas allows you to the opportunity to change what you think and how you view the world.
- **Customer focussed** – empathy with customers re their impacts.
- **Perform with a 'business culture'** as opposed to an 'IT culture' – there's still a divide in

most organisations no matter how much we pretend it doesn't exist.

ITIL by the book?

One of the underlying basics of ITIL since its birth has been the ethos of 'adopt and adapt' – adopting a service management culture and adapting the best practice guidance. We sought views on whether ITIL by the book really works.

KEY MESSAGE: *Doing ITIL – and PM specifically – 'by the book' was seen to be too restrictive for it to be a successful exercise. The group felt that there had to be flexibility in the approach. They stressed that ITIL is A FRAMEWORK of GUIDELINES – too many people see it as a bible, to be followed slavishly.*

The guiding principles of service improvement

There are nine principles that support service improvement in the ITIL Practitioner text. Successful adoption and improvement of problem management will be more likely if all aspects of the effort are guided by the principles. We looked at each of these to see what the problem management angle might

be. The highlights of our advice are shown in the table below

The Continual Service Improvement (CSI) Approach

The CSI approach is an overarching technique that enables CSI for any service provider, and at any organisational level. The CSI approach increases the likelihood of success for ITSM initiatives, puts a strong focus on customer value, and ensures an individual or team's work can be linked back to organisational goals.

What is the vision?

Problem management should (with all other processes and functions) support the organisation's goals and objectives. Understanding the context, objectives and boundaries for improvement to (or driven by) problem management is the first stage. We chose to look at some of the common constraints that affect problem management, their effect and potential mitigation. The constraints chosen diminish and limit problem management capability covering ITIL's Four Ps of service design: people, process, products and partners (see table on page 32).

Guiding principle	Advice
Focus on value	<ul style="list-style-type: none"> • Use a model to cost out incidents, problems etc. in terms of IT support costs, business impact, regulatory/reputational effects • (Re)-prioritise the problem management workstack to ensure best value for organisation/customers.
Design for (customer) experience (CX)	<ul style="list-style-type: none"> • Decisions have to be made on the basis of the end to end CX. It is key that this principle links with 'focus on value' • CX provides a much needed line of sight between the applications and those paying the bills.
Start where you are	<ul style="list-style-type: none"> • Don't just rely on the numbers – talk to the people involved – techies, business, etc. • Ask 'what do you think is wrong, what needs to be done to fix it?'
Work holistically	<ul style="list-style-type: none"> • Provide a single view of the truth through knowledge management, reports, documentation, • Ensure clarity of reports, processes, documentation and accountability for all of these.
Progress iteratively	<ul style="list-style-type: none"> • Implement any changes gradually, in little steps, to avoid overwhelming those involved with too much change all at once (eat the elephant a piece at a time) • Prioritise any easy quick wins • Appoint PM champions/advocates in the organisation, to help spread and reinforce the messages.
Observe directly	<ul style="list-style-type: none"> • Visit the business – find out first-hand what they feel is wrong • Use screen sharing (large disparate organisations) to fully document user issues • Beware of user apathy – especially after a major fix has been applied. They might start to accept a service behaviour which really needs to be fixed too.
Be transparent	<ul style="list-style-type: none"> • Publicity, communications and reporting need to be maintained throughout • Keep promises re updates to stakeholders and customers • Admit any mistakes made – don't be tempted to hide them • Acknowledge the full extent of customer impacts • If you don't know the answer, say so, and say you'll find out. DON'T guess!
Collaborate	<ul style="list-style-type: none"> • Get the right people in the right places in the organisation, covering the right roles • Avoid wherever possible having a mixture of business, technical and customer representatives on the same calls. Split them according to the audience, but try to have the same PM rep attending each such call for consistency of message. • Good facilitation is key to these meetings, as are a well-structured agenda and strong meeting leadership.
Keep it simple	<ul style="list-style-type: none"> • Translate business speak to IT speak, and vice versa • Tailor messages for the target audience • Be prepared to say, no! • Beware of the incident versus problem management conflict – IM have to recover service, while PM need to get root cause... • If need be, seek and obtain business approval to gather key diagnostics on repeat Incidents, at the expense of extended outages.

The nine principles of service management, as applied to problem management.

Where are we now?

The success of any problem management improvement initiative will depend on a clear and accurate understanding of the starting point. This should be evidence-based as far as possible (if only to satisfy those holding the purse strings) but surveys of opinions are just as valid.

The SIG suggested the following:

Capability – you must baseline problem management capability. It's not enough to simply go and look at your toolsets or processes. The ITIL Four Ps of service design can help guide you.

People aspects are considered by many as the prime area of concern. When assessing your practitioners (and other stakeholders), it's essential to consider:

- **Attitude** – a good problem manager will certainly need a predisposition to respond positively towards certain ideas, problems, people, or situations.
- **Aptitude** – good problem managers have an inborn potential to do the job. The traits listed in the basics section of this article allude to this.
- **Ability** – the skills an individual possesses at the present moment. We take a more detailed look at this later on.

In addition to current staff, it's worth using these criteria to assess people who may be future recruits to the problem management fold.

Process – you might choose to benchmark against a maturity model, ISO/IEC 20000 or COBIT depending on your aims. Benchmarking in its truest sense (i.e. business to business) can be useful but it is also problematic finding a benchmarking partner in your own sector.

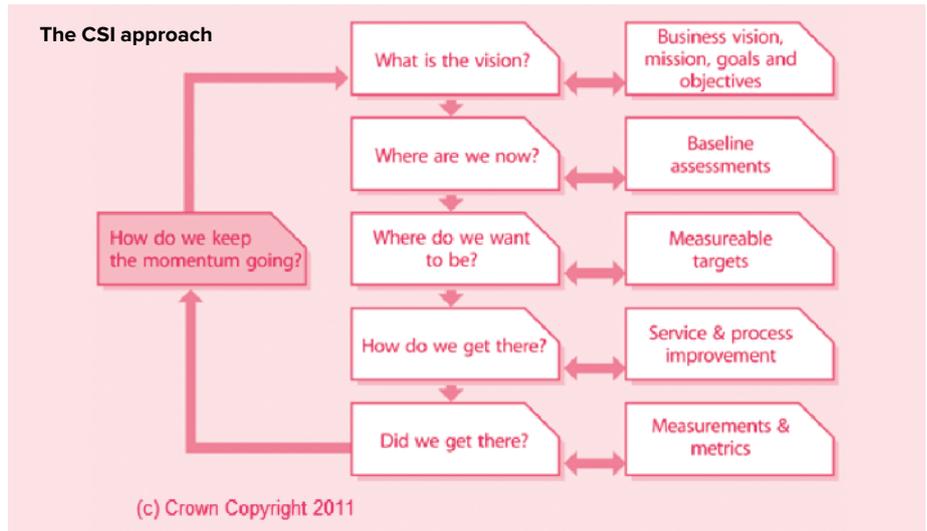
Product – when setting an objective to baseline toolsets it is worth remembering two critical elements. Not only do you need to baseline how the current tools work for you but also their capability as you might need to know how it can support you in the future. Partners – perhaps the most difficult area. Few suppliers want to get involved in long drawn out problem investigation, even less so if they're hitting the SLA numbers. The best approach here is to assess each supplier's attitude and willingness to be involved.

Where do we want to be? What metrics should we use?

Improvement opportunities can be identified and prioritised based on a gap analysis from the 'where are we now?' stage. Here we make sure any improvement opportunities are prioritised to ensure a strong customer focus. This is based on the key elements – value, outcomes, cost and risk.

A key element of this stage in best practice is the business case. Areas of value, outcomes and benefits for inclusion in the business case might include:

- Incident volume reduction – e.g. recurrent, service impacting



Constraint	Effect	Mitigation
Lack of Resources - for PM... This typically manifests itself as time.	Often PM has to struggle with few permanent resources, meaning that it has no ownership or focus and ends up not driven properly. This typically manifests itself as a time issue. There just aren't enough hours in the day for the problem function to fulfil the expectations of it.	The way we sell PM to stakeholders is key, to get resources assigned. The PM SIG covered this in some depth in a previous paper published in ServiceTalk, 'Selling problem management'.
Culture – a number of constraints here but in a world attempting to be more agile and responsive, the desire to report 'root cause' ever more rapidly is possibly the one that has the widest impact.	Root causes are reported well in advance of any sort of chance to conduct a proper investigation. Problem management is just not 'agile' enough and ends up becoming nothing more than 'super' incident management with bigger sticking plasters than the service desk.	Communication is key. Even if you haven't found a root cause your customer is more likely to be happy that you report on the chances of recurrence and their consequent risk exposure. Do it through accepted business reporting channels (BRM, SLM) and it will give you the space you need to conduct thorough investigations.
Education – in particular the lack of distinction by staff between incident and problem management	The line between incident and problem management blurs, leading to staff not knowing what they should be working on and to what purpose. Default mode ends up being incident management with problem inevitably suffering.	Specialised training for incident and problem managers allows them to become the advocates and mentors who may then educate business/ management and colleagues in understanding objectives of the two processes and where boundaries lie.
Contractual obligations – not knowing how committed your vendors are to solving underlying issues with their service/ software /hardware	Once a root cause is traced to a third party it can often be the end of problem management activity. That's deeply unsatisfactory for the organisation, seemingly powerless and impotent in the face of an unwilling or unable supplier.	Knowing when to stop a root cause investigation and when to concentrate on mitigation actions can be a powerful ally. You must understand whether it is economically prudent to assist a vendor in their investigations and when it is not.
Inertia – people simply don't get behind the initiative, often through lack of understanding	With no incentive to move away from the status quo people will revert to type, and incident management activities come to the fore. Permanent fixes are a key to customer satisfaction.	Put effort into simplifying and improving key elements of the process... handing over incidents properly, root causes analysed in a structured way, and communication of successful implementation of solutions.
Lack of resources – for resolver groups, suppliers and partners	Continual firefighting on incidents, plus work on new projects, results in lack of priority and action on outstanding problems, RCA and fixes.	Sell PM to team leaders, suppliers etc. to get resources assigned.

Common constraints for problem management

- Improved CX – through stable systems
- Reduced reputational impacts and risks
- Improved trust in services (from IT, the rest of the organisation, and customers)
- Better awareness of reasons for service failures, thus
- Driving education/training needs
- Incident avoidance, better change planning
- Cost reduction in service delivery – fewer incident and technical teams, reduced business impacts etc.
- Improved resolution times through better understanding of issues, better mitigations, reduced impacts

- Identifying skills shortfalls – knowledge gaps which can be addressed, especially to remove single points of failure/experience (i.e. individual technical resources who are the sole ‘gurus’ on key systems, and thus reduce/mitigate service risks that these SPOFs/SPOEs represent)

- Ownership of PM
- Strong leadership.

KEY MESSAGE: *Ensure that any stated benefits are tied to the organisation’s business vision, and that values are similarly tied.*

Risks to implementation

We also looked at potential risks to a successful implementation of the discipline. Here are ten of the most common (there are lots more):

1. Senior management fail to support problem management

The problem team may lack the authority to achieve their objectives. In such cases, senior management support is fundamental to success. When this doesn’t materialise problem management fails.

2. The scope of problem management is ill-defined and not communicated

There is a general risk of an error or omission in scope definition of problem management, leading to duplicated and misguided effort.

3. Lack of a change management process

Change management at the organisational level is critical to problem management success. Otherwise, problem management will have limited visibility into changes that impact the services and no controlled method of implementing structural solutions or workarounds.

4. Stakeholders have inaccurate expectations

Stakeholders develop inaccurate expectations (believe that the problem management will achieve something not in the requirements, plan, etc.) This is often what leads to problem management becoming the dumping ground for ‘difficult’ incidents.

5. Communication

Communication is a challenge that’s not to be underestimated. You may need to communicate the same ideas many times in different ways before people remember them.

6. Defensive team positions

Many IT teams fear the implementation of problem management and don’t co-operate as a way of masking their potential deficiencies.

7. Resources are inexperienced

Resources who are undertrained or who are new to problem management tend to make more mistakes and be less productive.

8. Failure to integrate with the organisation

This happens when we are focused on delivering something specific (ITIL compliance) and fail to look at the organisation as a whole. For example, you deliver a whole reporting

suite but have nobody to deliver them to.

9. Implementation disrupts operations/compliance

The last thing you want is for problem management to disrupt business operations, or damage your financial results or compliance processes such as audits.

10. A desire to be ‘lean’ and ‘agile’

If your organisation asks you to streamline your problem management process, that can be documented as a risk.

Metrics

Many organisations believe that anything that can be measured should be: KPIs in abundance and long flowing reports showing how you’ve performed against each. It is important to be selective, though. We don’t advocate using all our metrics here: it is imperative to avoid over-using numerical metrics, like time to find root cause or % cause found.

Here is a list of potential problem management metrics that can be used to measure success and set targets against:

- Recurrence of similar/same incidents – a good start as we sell problem management on our ability to deal with this type of situation. It’s a good customer facing one.
- Recommended fixes/workarounds/mitigations work first time – a solid view of the quality of our recommendations.
- Shorter time to restore incidents based on known errors – helps to show both our usefulness to the service desk AND how easy our fixes are to find.
- Service availability increased – whilst a service availability increase won’t always be attributable to problem management it can be a powerful message to match an increase to changes instigated by problem management.
- Reduced cost per incident fix (less work time needed) – workarounds and their accessibility can make a huge difference to this metric.
- Fewer challenges to major incident reports – not a hard metric but a good measure of your credibility and reputation. One might argue this is your trust metric.
- Speed of allocation of a problem ticket – a good inside-out measure to see if you’ve got your categorisation and allocation correct.
- Quality of information – the management information produced by problem management can be key in making better quality decisions.
- Adherence to target times for PM actions, investigation, implementation – a good check and balance for the problem manager on the performance of resources which they don’t always (actually seldom) own.
- Reduced amount of unplanned work in each service – indicative of good proactive problem management.

Keeping the momentum going

Whenever a service improvement initiative delivers the expected value the focus should shift to reinforcing the new methods and marketing the success. Organisational change management and knowledge management help to truly embed the changes.

What do you do to ensure problem management changes to reflect organisational needs?

- Maintain a link to business strategy to see what current and new organisational needs are. Best practice would suggest using an orientation worksheet here.
- Conduct regular reviews of PM processes and outputs with:
 - business stakeholders – through service managers
 - incident management, change management, help desk
 - technical support teams/suppliers/partners
- Hold problem management review boards to review PM policies and governance
 - with IT teams
 - with customers
- Review PM reporting to ensure it still hits the right people at the right time and is still relevant
- Conduct site visits – e.g. to contact centres or sales floor – check that key systems are really operating optimally after recent changes, and if not, check what issues remain, and ‘peel the onion’ to establish any further fixes required. This is such a good example of the ITIL principle of observe directly
- Ensure key PM lessons learnt – especially from failed changes – are being fed back to the programme/project management community, to reduce failed implementations in the future
- Prioritise (or re-prioritise!) the PM workstack in discussion with business stakeholder/service management
- Undertake customer satisfaction surveys – especially to lower levels in customer teams, to get the feel from the shop floor.

Organisational change management

Three major elements of organisational change management from the Practitioner guidance were considered by the SIG working group.

Sources of resistance

However beneficial problem management might be to your organisation, it is highly likely that there will be resistance to the changes. It is important that you plan to manage it: (see table on page 34).

Creating a sense of urgency

Establishing a sense of urgency means you’re trying to change the status quo, to push

employees to no longer be complacent and to help them see that it is critical to move forward sooner rather than later. Where the need for problem management is not clear, there's no real reason to work on the project related to the change because you have not gained interest or convinced people that putting in effort would be worth their time or energy. If urgency cannot be established, there is no commitment in helping move the effort forward. The specifics for problem management include:

- Making the risks of not moving forward highly visible, with quantification
- Publishing statistics about delays in problem queues and relationship to extra incidents
- Giving more specific timescales about when improvements must be completed by (impending events)
- Using calendar invitations to prompt action at a specific time (or at least force a refusal).

KEY MESSAGE: *Sometimes the IT organisation simply do not want to hear about the real situation of repeat incidents and they deny the facts rather than deal with the implementation of problem management. This is a part of human nature, especially when they are faced with increasingly busy schedules. Senior management teams often focus too much on success in incident management and gloss over the need for problem management. This causes a failure to recognise that changes are needed.*

Behavioural competencies for problem management

Behavioural competencies encompass knowledge, skills, attitudes, and actions that distinguish excellent problem management staff. In order to achieve consistency of execution across the organisation we identified the following expectations for problem managers.

Job effectiveness

- Achieves results – for example, implementing the findings of major problem reviews
- Communicates effectively across all levels of the business – this may involve more virtual meetings
- Demonstrates organisational knowledge – and so understands the real impact of problems
- Has commercial awareness – the ability to know when a problem is no longer commercially viable to solve.

Makes effective decisions

- Planning/organisation – the ability to work with virtual teams and conflicting priorities
- Problem solving – naturally!
- Productivity – to ensure a huge backlog of problems does not develop
- Takes responsibility – for example, sponsoring changes through the change process.

Makes people matter

- Builds trust – with both internal and external colleagues

Resistance	Mitigation
No management commitment	<ul style="list-style-type: none"> • Reinforce the business case, making it visible to senior managers • Engage senior managers in role play, for problem management training, using recent examples from the business as case studies • Work through some of the managers' own current issues as examples of the value of PM
People say yes but 'do no'	<ul style="list-style-type: none"> • Make the use of problem management part of objectives
People revert to old ways of working	<ul style="list-style-type: none"> • Talk to these individuals to find out the reasons/barriers that they see, and ask what they feel can be done to address these issues. • Carry out quality checks against the new standards
Process managers lack the appropriate authority	<ul style="list-style-type: none"> • Get management buy-in • Try to locate the right person in the right role in the organisation – someone who believes in PM • Look to business stakeholders to help explain why they feel PM is needed
Throwing ITIL solutions 'over the wall' and hoping people will follow them	<ul style="list-style-type: none"> • Improved training needed for offenders, using case studies to explain the impacts on all teams
No continual improvement focus (lack of sustained momentum)	<ul style="list-style-type: none"> • Needs regular, transparent communications and updates re the progress of the PM implementation project • Highlight and celebrate achievements of the implementation team
ITIL (and PM itself) treated as the objective	<ul style="list-style-type: none"> • Imbed PM into the daily routines • Drive CSFs, KPIs to ensure that the process is followed • Include people on the ground in the rollout and project development • Ensure clarity of objectives • Focus on targeted training and education
The attitude 'ITIL will never work here'	<ul style="list-style-type: none"> • Demonstrate how it works • Challenge 'nay-sayers' to provide evidence to support their concerns • Demonstrate counter arguments with real life examples/case studies
Cannot specify the value required by the business to get their support	<ul style="list-style-type: none"> • Use the business case and examples/case studies to address business concerns
Everything is high priority, so no ability to truly prioritise	<ul style="list-style-type: none"> • Use a priority matrix to reprioritise work stacks • Provide education/training for teams and for the business to ensure that their priorities are reflected (through service reviews, for example)

Sources of resistance to change

- Shows honesty/fairness – important for promoting a 'no blame' culture
- Has good interpersonal skills – making virtual teams work together
- Has a positive attitude – there are often occasions when a root cause seems so far away
- Recognises others' achievements/contributions – often needed to keep people from other teams 'sweet'
- Resolves conflicts constructively – for example, in dealing with difficult customers
- Understands others' perspectives – there may be many of them when looking for solutions to complex issues.

Achieves organisational success

- Has commitment to continual improvement – important as many problem management teams morph into this role
- Understands the value of continuous learning/development – problem managers should always be searching for new sources of knowledge to enhance problem solving capability
- Shows creativity/innovation – a holistic approach to finding solutions is important
- Values teamwork/cooperation - within and across teams.

Conclusion

It seems obvious that one of the most fundamental disciplines in service

improvement would benefit from using the ITIL Practitioner guidance to enhance its own capability. Our principal discovery in our research, in line with the Practitioner guidance, was that the 'people' side of improvement is the most critical. Without the right people, with the right skills and correct support, we are dead in the water.

We reached two other conclusions. First, that problem management is a journey during which we must constantly adopt and adapt best practices. As technology, digitalisation, shifting working patterns and new demographics encroach, our role as problem managers must morph to suit the new paradigm. We cannot afford for our toolsets, knowledge or skills to stand still.

The final conclusion will come as no surprise – the realisation that we must focus on the value to our customer of every change we make. That will drive improvements in any organisation now and forever more!

The Problem Management SIG members who contributed to this article and the research behind it are: Barry Corless, Adrian Spooner, Simon Barbour, Tony Brough, Michelle Horner, Lucy Craven-Wickes, John Crawford, Tanya Cutts, Michael Haynes, Garry Hunter, Ujjwal Kumar, Adrian Richardson, Derek Scott, Paul Soutar, Andrew Vermes, Rob Goodwin-Davey, and Melanie Kirby. A big thank you to them all!

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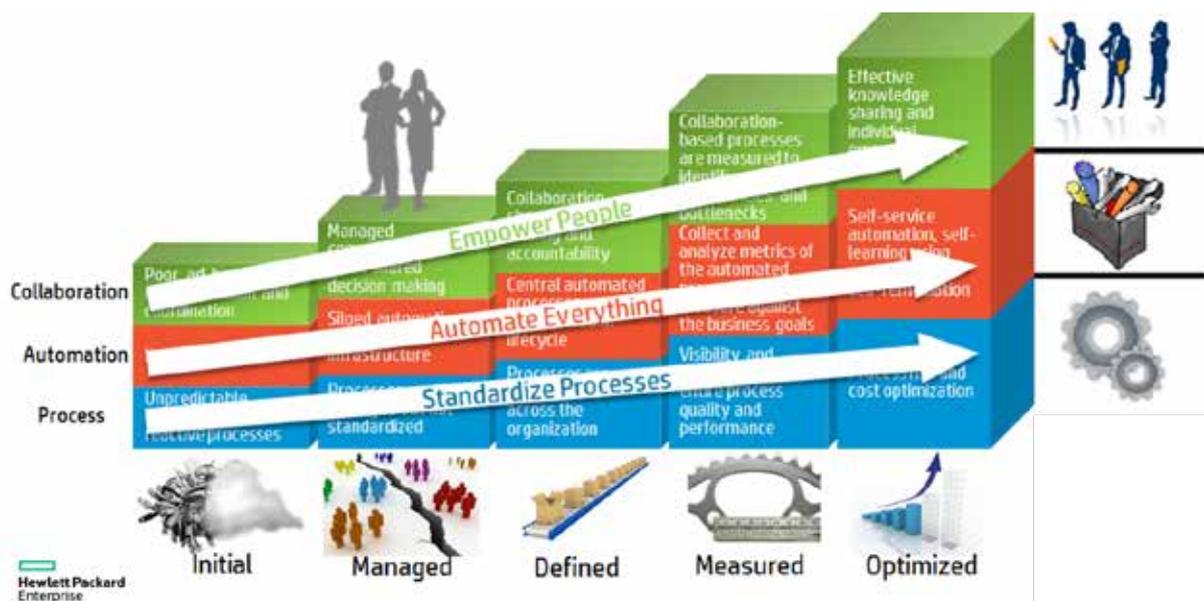
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