

ISSUE 01

itsMF UK

serviceTALK

EXPRESS

ITSM TOOLING EDITION

Product selection:
avoiding the
common mistakes

A tooling strategy for SIAM

Preparing for implementation



THE JOURNAL OF ITSMF UK

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Editorial: Welcome to ServiceTalk Express!

At the start of this year itSMF UK unveiled its Service Management Technology (SMtech) Forums – aiming to provide members with the latest information and guidance on products and directions in our fast-changing industry. The first of these events, on 29th January, focuses on tool selection and the challenging issue of finding the right tech partner to help meet your business requirements. There will be further events in this series in the months ahead on popular topics such as asset management and artificial intelligence – check out the website for more information.

To complement these bi-monthly forums and share some of their key messages with a wider audience, we are introducing an off-shoot of our long-running member magazine in a new format – ServiceTalk Express. The first issue focuses on selecting the right tool set to support your ITSM environment, featuring ITSM consultant and author Barclay Rae on the questions

to ask before undertaking a product implementation, and Hornbill chief evangelist Patrick Bolger on doing your homework and avoiding the common mistakes in making your tool selection. Also in this issue by popular demand is Steve Morgan's article on tooling strategy for a service integration environment, highlighting one area where vendors need to expand and enhance their products to accommodate the changing needs of the business. We also hear from itSMF UK director Richard Horton on opportunities for members to become more involved in regional activities.

Whether you're 'in the market' for new technology or just looking to sharpen your negotiation skills, I hope you enjoy the first issue of ServiceTalk Express. Please let us have your ideas for future editions.



Mark Lillycrop
Professional Services Manager, itSMF UK
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Draw breath and step forward!

itSMF UK Member Meet-ups are an excellent way to find out how other organizations are tackling the pressing issues of service management. They also provide a great opportunity to hone your presentation skills, suggests Board member Richard Horton.

The last itSMF UK Member Meet-up in the North of England provided a welcome step aside from the headlong nature of December and all its festivities. Congratulations to the North regional chair Jen Smith of Enact, and many thanks to the speakers on the day – Anna Leyland and Suzanne Slatter from Sopra Steria, and Shan Beerstecher from Skipton Building Society – who all shared valuable insights into their current service management challenges. By the way, I also presented, trying out an unusual method of presenting. It went down well, and I'd encourage others to try different things - PowerPoint isn't compulsory!

I'd like to talk a bit about Shan's session which kicked off the day. It's the first time I've seen Shan, or anyone else from Skipton Building Society, present about what's been going on there, so it was intriguing to hear about how their story has unfolded. It was clear from the way Shan told the story that she had both used the cultural strengths of the organisation and her own personal insights to set up their journey and give it a good chance of success. It's important to work within the constraints of situations we find ourselves in, but they can also present unexpected opportunities. While many may be jealous of the Digital Festivals Shan was able to set up and use to generate momentum, her ability to see the opportunity

and leverage senior management support to make them a reality was an inspiration. Similarly the way she used the insights her South African heritage provide to emphasise that "I am what I am because of who we all are" (ubuntu) showed how our personal qualities are important in how we make a difference.

I'm just skating over the surface here. Hopefully you get the idea that this was a story worth hearing and I'd like to use this to commend our Member Meet-ups around the regions to you. They are an excellent place to both tell and hear our stories. Sometimes people are a bit shy about stepping forward. Maybe you are not sure whether what you have done is that interesting, maybe there is concern about talking about the weaknesses in your organisation or about the things you have not managed to achieve. Maybe you are just too much in the moment to sense the overall story. Or maybe it is simply that it takes time to build up a story. Can I encourage you to draw breath and think about stepping forward? The level of questions and interest from people at the end of Shan's presentation showed that there was real interest in engaging with what she had done, and no one's organisation is perfect. No one comes to these events to pick holes.

We come to learn together. Sharing stories like this can be a powerful enabler of such learning, and itSMF UK member events provide a distinctive opportunity to do this in a supportive environment. In my role as the Board member who represents groups, I am very keen to see such vibrant exchanges happening. So, do come and participate. Listen to the stories others bring and tell your own. As people sometimes say about volunteering in general, you get out what you put in. And you never know, if all goes well it could be a platform towards something like speaking at Conference. I'd certainly be keen to hear Shan's story again.



Richard Horton
itSMF UK Board Member and Service Portfolio Manager at NIHR CRNCC

Member Meet-ups

One of the big features of itSMF UK membership is the chance to attend our member networking events, which take place throughout the regions – London and South East, South West and Wales, Midlands, North, Scotland and Northern Ireland. These events provide a great opportunity to link up with other professionals to discuss burning service management issues in a relaxed environment, and all Member Meet-ups are open to ALL members, wherever you are based. Meet-ups generally include presentations from guest presenters and from our special interest groups, plus time for discussion and feedback on the themes of the day. They're also a great way for new speakers to share their views and experiences; if you would be interested in presenting at a member event, please contact the itSMF UK office or one of the regional chairs listed on the website.

FREE TO MEMBERS!

ITSM19: The best value ITSM consultancy you can't buy

Our Annual Conference & Exhibition will be back in London on 18-19 November 2019 - featuring inspiring keynote, four streams of educational breakouts, and interactive workshops.

ITSM19 is our flagship event for the service management community, and this year it will be re-combined with the Professional Service Management Awards – one big celebration of industry expertise and achievement, highlighting the ITSM experiences of our leading-edge member organizations and the commitment and inspiration of our teams and individuals.

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The Professional Cloud Service Manager (PCSM) enables participants to design and deliver cloud services. It provides a hands-on, practical approach to understanding how cloud computing and cloud-based services impact operational processes, and how to adapt existing processes to deliver better services. Join our masterclass with optional exam facilitated by Mark O'Loughlin, Managing Director of Cloud Credential Council. Check out this unique opportunity to gain an exciting new qualification at a special price.

Service Management Technology Forums

ITSM tools and technologies are developing at a relentless pace, and keeping track of each product and service is no mean feat. We have the solution. SMtech Forums provide the information, contacts, and insight you need, all under one roof. Each bi-monthly event will focus on a particular area of service optimization and development – such as AI or asset management.

FREE TO MEMBERS!

The day will start with presentations from the top SM technology companies, outlining their key offerings and the benefits they provide. Then it's over to you – ask the difficult questions, debate the key issues with other attendees, watch the demos at the vendors' stands.

It's the SM software equivalent of speed dating – we'll help you find the ideal partner to solve your business needs, and without the awkward conversations and endless hours of online research.

Masterclasses – learning from the experts

Our masterclasses take a fresh approach to the challenges faced by today's ITSM practitioners. They are created and facilitated by experienced facilitators from within the industry, providing real-world guidance and practical advice.

During 2019 we'll be supplementing our core masterclass programme (service catalogue, major incident management, problem management, change and release, and CSI) with a host of new subjects to reflect the changing ITSM landscape. These include AI, intelligent swarming, knowledge-centred service, lean IT and cloud service management. Of course, we will also be providing in-depth workshops on ITIL 4 as more practical information becomes available. Check out the schedule below for the full list of topics and dates.

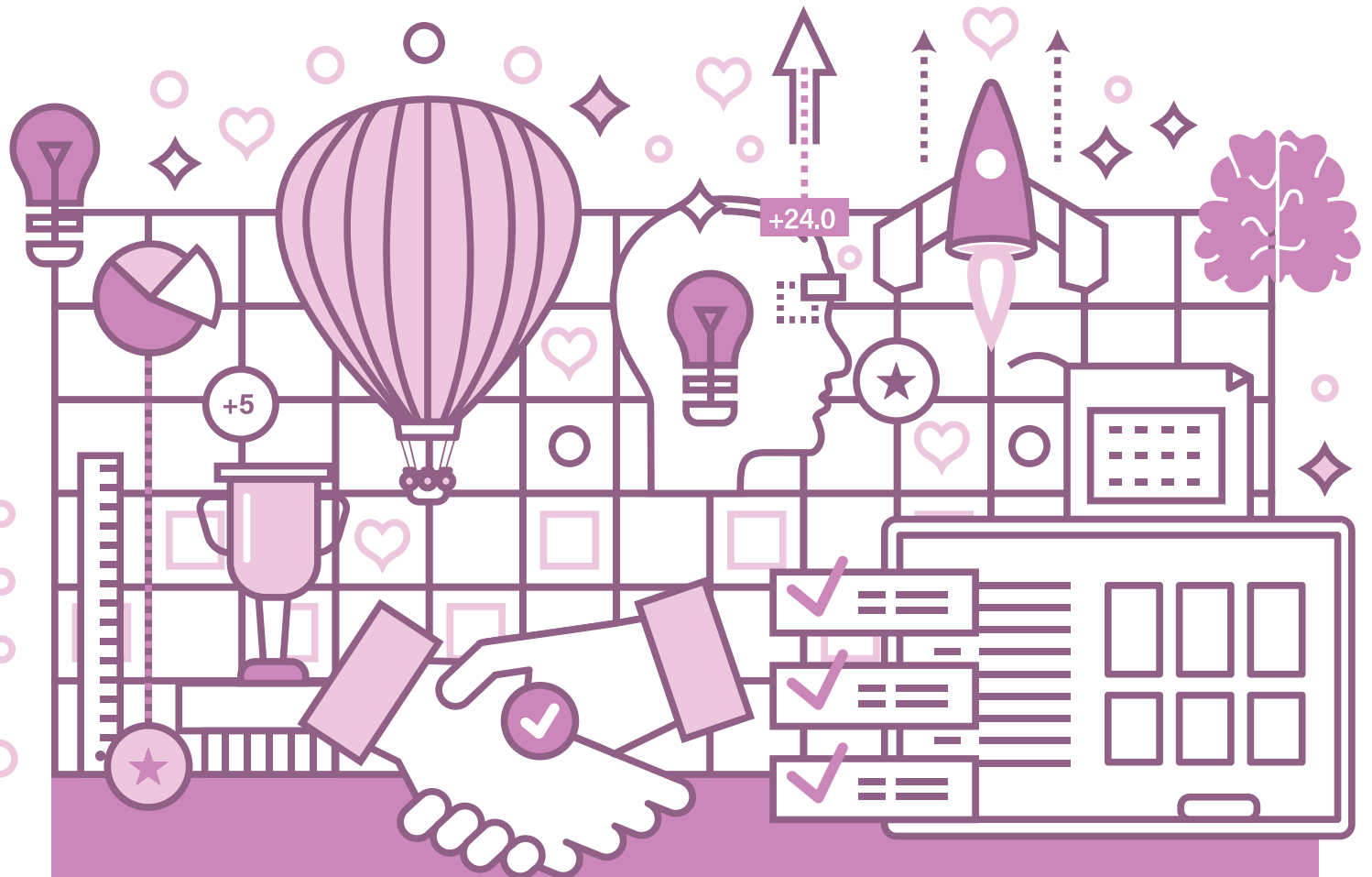
itSMF UK Event Schedule 2019

	PRICE	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
MASTERCLASSES													
Business & IT Alignment	£295	30 (L)											
Business Information Management (BISL)	£295				30 (L)						17 (M)		
Change & Release	£295			18 (L)						16 (Le)			
Continual Service Improvement	£295							12 (M)					
Customer Service	£295					14 (L)						28 (Le)	
Designing Your Operating Model using the Operating Model Canvas	£295		28 (L)										
DevOps Simulation	FREE				17 (L)					27 (Le)			
Digital Capabilities Management Model	£295			14 (G)				24 (L)					
ISO/IEC 20000	£295			28 (L)							03 (B)		
Knowledge Management (KCS)	£395						10 (L)						
Major Incident Management	£295		22 (L)			16 (Le)					10 (L)		
People Management Skills	£295		06 (L)							12 (B)			
Problem Management	£295			07 (L)				18 (Le)					
Professional Cloud Service Manager	£600		12-14 (L)										
Service Catalogue	£295				11 (L)								09 (Le)
Supporting Emerging Tech in ITSM & TOGAF	£295					29 (G)						14 (L)	
ThinkNation	£295				04 (L)						TBC (G)		
REGIONAL MEMBER MEET-UPS													
London & South East	FREE						18				22		
Midlands & East Anglia	FREE							04					03
North	FREE		26					09					
Northern Ireland	FREE			29						27			
Scotland	FREE		05				04				29		
South West & Wales	FREE			21						12			
SERVICE MANAGEMENT TECHNOLOGY FORUMS													
Technology Forums	FREE	29 (L)		19 (L)		23 (B)		TBC		TBC			TBC
ANNUAL CONFERENCE													
ITSM19 Conference & Awards	SEE WEBSITE											18-19 (L)	

Key: (L) London, (B) Birmingham, (M) Manchester, (E) Edinburgh, (G) Glasgow, (Le) Leeds. For the exact location, or where location is not listed, please visit the website for latest details.

For more information on any of our events visit - www.itsmf.co.uk/events

Preparing for ITSM tool implementation



Barclay Rae outlines the groundwork that needs to be in place before selecting an ITSM product, and stresses the value of extra planning around data and project management.

This article was originally published in Joe the IT Guy's blog.

If you are just buying or have bought a shiny new IT service management (ITSM) tool – congratulations! You have many good opportunities coming up to develop your service quality, sort out issues, and generally get more value from your service delivery. Often the procurement projects can be major projects in themselves – it might seem that the hard work is done and that you can relax.

There's much to do, however, particularly in the next period before the vendor arrives or you spin up your new system. This will in fact be a major influencing factor to determine the level of success for your project and tool implementation.

You may have bought some vendor consultancy and training services to help

you to move from your current state to a new world of optimized functionality and operation. All vendors and approaches, regardless of the level of external help used, will make some quick and pressing demands on you to make decisions around structure, data, forms, fields, and tables. In my experience often these decisions are made quickly and without a full understanding of the impact on outputs, reports, and operations.

So it's important to move quickly towards a common understanding of some key concepts in order to make the right decisions. It's really useful to take some time and see the bigger picture for data structure, in order to avoid rework and disappointment in the future.

It's also essential, as part of the project, to take a practical look at what needs to be

done, by whom, and when – logistics can be a real killer for organizational change projects. Project management needs to be pragmatic and resourceful, rather than just following 'standards' or 'best practice.' ITSM is very definitely NOT a traditional IT development project.

So let's look at some key areas where you can prepare early and get ahead of the game:

Data

You've probably thought and documented a lot around software functionality – many RFPs go into great detail around specific process functions.

However, the big challenge that gets forgotten and needs to be addressed and defined quickly is: **data!**

Your vendor will probably provide you with a data workbook in some form or another, requiring you to provide them (or for you to do yourself) with information about the structure, format, source, and content of your tables. This of course is needed to build the system to work for your organization and will in turn provide the basis for your reporting and performance measurement.

Some key questions to answer:

- What data do we need?
- What format is required?
- Where can we access this data?
- Who owns it and is responsible for its quality?
- Is the data usable as is or does it need to be cleaned/modified?
- Do we need to create some new data from scratch?
- How and when will we transfer this data?
- How will the data be maintained in the new system? By whom?
- Will the new system be the single repository of the data and/or is a regular update required from the original source (e.g. Active Directory)?

These are all important questions, and from a practical point of view there needs to be clarity in planning the migration and ownership around data, i.e. securing key technical resources when needed (from both parties), ensuring that access to original data is agreed and planned, provisioning suitable platforms and storage.

All of these areas need to be coordinated in order to avoid waste and delay. I have witnessed this happening many times, where expensive people have been sitting around twiddling their thumbs, burning precious project funds because a Database Analyst (DBA) hasn't been booked or on-hand to provide access to corporate systems on agreed and business-critical dates. Be warned!

Types of data

So what sort of data do we need? This is a key area to do some workshops on as soon as possible and get some common understanding and consensus in advance of working with the vendor.

Organizational data

This is basically your organization and your Infrastructure. These may seem to be different areas but ultimately they form the backbone of your organization and against which you will log events – and in which format you will want to see outputs. This includes:

- People / IT teams / user departments / projects
- Sites / buildings / rooms / workspaces
- Regions / geographies
- Configuration Items (CIs) – assets, hardware, software, infrastructure, applications (generic and specific)
- Configuration – linked CIs, dependencies, infrastructure maps

- Knowledge – known errors and corporate resolution history, FAQs, information

Service data

This is where you define the 'service layer' of your operation. It includes all the warranty aspects of your delivery, including:

- Service definitions – owners, customers/users, business functions, business criticality, risk
- Service Level Agreements (SLAs) and Operational Level Agreements (OLAs) – availability, response and fix, key metrics, relative priorities
- Service hours / calendars
- Contract and financial details – charging mechanisms, thresholds, penalties
- Support/supply chain information – service hours, support model, support groups, escalation details
- Customer experience – CSAT measures, feedback mechanisms

Transactional data

This is to support the standard ITSM operational processes, during the fluid lifecycle of incidents, problems, etc., including:

- Priority – impact / urgency
- Status – accepted, pending, closed, etc.
- Logging category*
- Closing category – cause codes, actions taken
- SLA status and reasons for failure
- Problem, change, knowledge links
- Audit trail – user, based, audit trail, social interaction

**Category is often misused and can include data that is already recorded elsewhere. Some operations use this to record high level service definitions, whilst for many it is simply an initial identifier of the incident 'type' for escalation purposes. It's important to separate logging categories from closing (causal) categories – if you want to improve quality and problem management.*

It's vital to be absolutely clear on the definition and usage for this field as it can often confuse staff and lead to inaccurate or untrustworthy output data.

Reporting

An essential element in defining your data structure is the requirement for Management Information – reports, dashboards, etc. – that will be outputs from the ITSM system. These include:

- Volumes of interactions, by department, IT team, region, category, input channel, SLA, etc.
- Service availability and support performance
- Breaching of SLAs and operational targets
- IT team performance, first-level fix, escalation count, backlog
- Dashboards and Red, Amber, Green (RAG) status of services and operational performance
- Consumption of services and request demand

- Costs and ROI on services, products, components
- Asset costs and depreciation

Project management

As we can see there is plenty of data definition and collection to do in order to prepare for your new tool implementation. The other big challenge area is **organizational change management** – not just introducing new processes and tools, but making people want to follow new ways of working.

I've already mentioned that ITSM is not a traditional 'development' project and this means that we need to think carefully about what sort of person is given the task of leading this project. This needs more people and communications skills than might be expected from the traditional development manager. This cannot be someone who has just been on a Prince2 course who only shows up once a week to check on 'deliverables' and enters these into Microsoft Project, then disappears.

A successful ITSM project requires someone with great practical, organizational, communications, and influencing skills. I'd prefer to see someone who isn't technical or even an ITSM expert (although it helps) but who can command respect and get things done – a completer/finisher who knows the organization.

The best ITSM project managers I've worked with have had a good combination of skills – organization, technical, and ITSM. However it's hard to find these people and from a practical perspective it can be useful to find someone with some or most of these skills, perhaps topped up by some extra skilled help where needed.

So, when you are kicking off your ITSM tool implementation, get moving on data and project management. The planning will save time and improve value.



Barclay Rae is a director of ITSMF UK and has extensive experience as a consultant, analyst and subject matter expert in IT Service Management. Check out Barclay's excellent product selection checklists at tinyurl.com/ITSMchecklists

Product selection: avoiding the common mistakes

Patrick Bolger offers some advice on finding an ITSM product (and vendor) that can really help you address your business challenges.

At a recent ITSM event, a delegate posted a slide from a presentation by industry analyst Stephen Mann which said, "Organizations are continuing to switch ITSM solutions every three to six years. It has become an unfortunate, unwanted and expensive technology cycle that needs to be broken."

There are several reasons why this expensive and disruptive cycle is continually repeated. This article explores the classic mistakes that ITSM tool vendors see all too frequently. If you haven't got the time to read the entire article, my reply to the original tweet provides the tl;dr (too long; didn't read) version.



Exploring the ITSM tools market

With roughly 200 vendors selling service desk tools, and around 70 vendors active in the mid-market and enterprise space, selecting the right ITSM tool for your organization is no easy task. The pace of development has been relentless in recent

years and many tools now offer 100% codeless customization, loose coupling with open APIs for seamless integration, and continual deployment that removes the pain of software upgrades. From basic ticketing systems to full ITSM suites, with multiple deployment models and licensing options, the choice is staggering.

There is a plethora of online resources that can help with your initial review of the ITSM tools market. Analyst reports can provide some decent insights, but they usually cover just a handful of vendors, and you may be missing out on new and innovative solutions. When used correctly, these can be valuable resources, but limiting your selection criteria to vendors that appear in the top right of a quadrant is a huge mistake. Software review sites can give you a sense of what customers say about different ITSM tools. However, these sites typically rely upon vendors encouraging their customers to leave reviews, or pay-per-click vendor bidding wars, so don't expect the 'warts and all' TripAdvisor experience.

If you're looking to purchase a new ITSM tool, remember that the tool is only one part of the equation. What you are really investing in is a relationship, and meeting vendors face-to-face is the best possible way to make an initial assessment of both the tool and the vendor. Although vendors will quite happily visit you to provide demos, it makes sense to save this phase until you have bottomed out your requirements and can provide vendors with some scenarios to run through with your selection team.

Fortunately, in the UK, there are numerous opportunities to get exposure to several vendors over the course of one day. The

itSMF UK SMtech Forums (<https://www.itsmf.co.uk/events>) are an ideal opportunity to save endless hours of online research and get valuable insight into innovation within the ITSM tools market. If you want exposure to over 75 ITSM tool vendors, visit the Service Desk and IT Support (SITS) show in May at Excel in London (<https://servicedeskshow.com/>).

Before embarking on your selection process, it is important to be clear about what outcomes you are looking to achieve with the new tool:

- What are your greatest areas of pain?
- What business challenges are you trying to solve?
- What is the impact of not solving those challenges?

Once you have answers to the above questions, you will be able to set objectives and scope initial requirements before exploring the market. It takes effort and persistence to gather the right information to adequately scope your requirements, so it can be tempting to shortcut this stage, but it's a big mistake, and one that you may have to live with for three to six years.

Avoid the most common ITSM tool selection mistakes

Over the last twenty years, I have personally seen hundreds of ITSM tool selection processes. On at least a dozen occasions, I've seen the same tender document from different organizations, where the name has been changed but the content is the same. On the one hand, it's a relief to know that the response won't be hard work, but on the

other, there's a sense of real disappointment, because vendors want to understand the challenges that organizations are facing and whether our solutions can make a difference.

If that information is missing from your requirements document, vendors must go through the motions and reply to the document, in the hope that we can tease out the information we need, should we get through to the next phase in the selection process.

Responding to tenders is a resource-intensive, time-consuming and expensive exercise, so if the document looks like it's been written with a specific vendor in mind (which happens frequently), it may make commercial sense for other vendors to withdraw early. Although few vendors will complain about the quantity of RFPs they receive, they will justifiably moan about the quality. Ask any vendor about their biggest gripes with requirements documents and tenders, and they'll list the same recurring issues.

Framework fascination

In my experience, the most common mistake is that most tender documents focus extensively on ITIL® process adoption. They describe the IT infrastructure, the support organization structure, and page after page of process requirements. However, they fail to explain the challenges the IT organization is facing, or the outcomes that are needed to deliver value to customers.

Although tools vary in the ways they deliver functionality to support ITIL I would go as far as to say that modern ITSM tools deliver more ITIL capabilities than the average IT organization will deploy in a lifetime. A tool's ability to support ITIL, or any other framework, provides no guarantee that it will improve service quality or deliver value to customers. In fact, it frequently has the opposite effect. Too much emphasis on IT process adoption draws attention away from the customer experience and the issues that are truly impacting the business. This isn't good for the service management organization, its customers, or the vendor.

Overstating your initial objectives

Successfully implementing a tool does not signal the end of your journey – it is the start. That's one reason why it's important to avoid overstating your initial objectives and to be realistic about what you can achieve within reasonable timeframes.

Buying for the future is not a sensible justification for specifying the need to support 15 ITIL processes if your organization is struggling to cope with 5. A tool will not change the culture of your organization, and unless you set realistic expectations about what can be achieved, you will end up with a tool that is overly-complex and expensive to maintain, and with lots of functionality that never gets used.

Not understanding the customer's perspective

Customers form a perception of service quality based on what's visible to them. If the front office provides a good service experience and meets expectations, the customer isn't concerned about what happens behind the scenes. Because the service desk is the area of IT that is most visible to the customer, an effective service desk will enhance the business's perception of the quality and value of IT services. Conversely, the reputation of the entire IT organization can be damaged by an ineffective service desk. It's vital we get this right by understanding the customer's experience.

The consumerization of IT has had a significant impact on user expectations. Customers and service desk analysts alike want the applications they use at work to be as intuitive as the tools they use in their personal lives. Appreciate the knowledge and self-sufficiency of your customers and provide them with a platform that easily facilitates self-help, self-service, collaboration and peer-to-peer support. Get this right, and users can help themselves to an improved service experience and higher levels of satisfaction with IT services.

Not understanding the vendor's perspective

Vendors want to sell you software, but it's not just about making the sale, because bad business is expensive. If your requirements document has not helped the vendor to understand real challenges, they will struggle to deliver. The customer won't be happy, and the reputations of both the IT organization and the vendor will suffer. If the vendor can identify, early on, that they can't provide a good match for your requirements, they will walk away. A well-crafted requirements document allows both parties to recognize this, and part company, before everyone wastes time and money.

Getting IT right

Occasionally, a requirements document sticks out like a sore thumb, because it fully describes the current state of service management within the organization and provides real clarity about the business challenges that need to be addressed, and the outcomes desired from implementing a new tool. They reek of a service management team that understands their customers and the improvements that must be made to deliver value. These documents are rare, but when you find them, they're a pleasure to respond to.

Put the effort in up-front

Crafting an effective requirements document takes significant work, but it's worth the effort. If you use a template created by

someone else, you will fail to communicate the challenges you need to solve and will end up choosing a tool based on features. When the new tool is implemented, the initial focus on service improvement will make things better, but only for a short time. Once the tool has bedded in, the focus on improvement usually stops. Mediocrity takes over, the tool gets blamed, and the whole cycle is repeated, without any attention paid to the lessons learned from the previous experience.

Trial the tool, with your data and processes


Regardless of the sources you use to do your research, or which vendors make your shortlist, there is no better way to mitigate risk than by trialling the tool in your environment, with your data and processes. This approach works because you get to use the tool - for real - while developing an understanding of what the vendor will be like as a partner. It works for the vendor too, as your requirements become crystal clear (in a way that cannot be specified within a requirements document) when the tool is being evaluated.

Some time ago, I wrote a Smart Guide, "Essential considerations before selecting your next service desk tool", which delves into the topics discussed here and provides additional guidance about tool and vendor selection. It has been downloaded more times than any other Smart Guide on our website, so hopefully the message is getting through. You can download the Smart Guide from <https://bit.ly/2F63UV3>

Consider the advice in the Smart Guide, put the effort in up front to explain the business challenges you need to solve, and trial the tool. It's the best way to ensure that you'll get a tool that's right for your organization, and a vendor that you'll be happy with as a long-term partner.



Patrick Bolger is Chief Evangelist at Hornbill Service Management, and works closely with customers, industry organizations, and IT luminaries to identify and promote IT best practices.



a tooling
strategy for

SIAM

Steve
Morgan
discusses the
key tooling
requirements
of an effective
SIAM environment.

“To make multisourcing arrangements effective, customers must get suppliers to work together, both from the commercial and operational standpoint. The Services Integration layer, comprising elements of process, tools, service level agreements and related structures, is absolutely critical to the success of these arrangements”

Forrester Research

What is SIAM, and how can it benefit your business?

As organisations move towards a multi-vendor, tower-based sourcing model, there is a need to create a central capability to coordinate and manage service management processes, exert governance and manage service provider performance. The SIAM (Service Integration and Management) function can be retained or sourced as an over-arching tower function.

As Forrester stated (left), it is critical to get the suppliers in the eco-system to work together, and this is facilitated to a large extent by the tooling.

The SIAM function is accountable for ensuring consistent execution of processes, as well as acting as the translation layer between the technical services provided by the tower providers to business services consumed by the business. This is described in the simple SIAM model in Figure 1.

In this article we will explore and analyse the tools required to successfully create an effective SIAM model. To keep things simple we will keep tools that are specific to other functions, for example password reset tools used in a Service Desk environment, out of the equation and look at them in more detail in a future article.

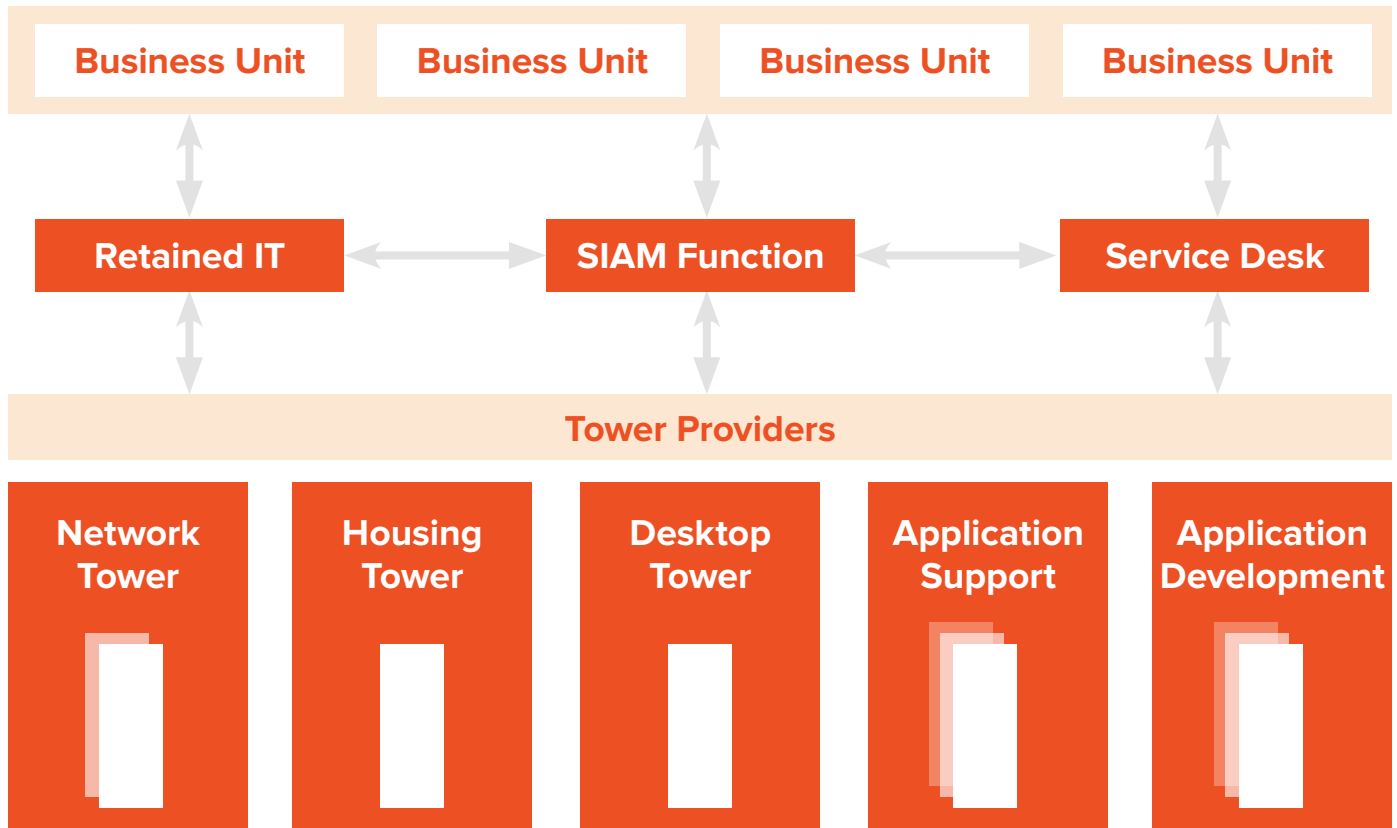


Figure 1: A simple SIAM model

SIAM tooling strategy

As more and more organisations embark upon a SIAM strategy to IT sourcing, where a multi-vendor approach is adopted, the importance of a robust tooling strategy has become even more important.

This renewed importance is primarily due to the fact that, in a multi-vendor environment, ownership of the various tools in the overall portfolio can become unclear. In order to maximise the business benefits of the SIAM model, your existing toolset will, at the very least, require configuration changes. In all likelihood, a completely new toolset will be required if you want to see the full value and of your transformation and a clear return on your investment.

core attributes of an ITSM tool in a SIAM environment, which are over and above the core functionality expected from an ITSM tool.

From my experience, a good ITSM tool will have the following features:

• Seamless integration

Uppermost of these essential characteristics is the ability to integrate seamlessly with other tools through the use of industry standard interface technologies. This will allow the real-time transfer of incident, problem, change and request tickets between different systems, which is particularly important in a SIAM environment as there is the potential for numerous suppliers to be involved in the resolution of a single ticket. Ideally, a single, common toolset should be established, as the single source of record and all suppliers should use this system for simplicity and accuracy. This avoids the requirement for complex tool integrations, but SIAM organisations need to be wary of the fact that, if a supplier is forced to use a designated toolset, they will undoubtedly have to integrate the chosen tool and their own in-house toolset in order to exchange data with shared service teams within their own organisation.

• CMDB integration/synchronisation

In a multi-vendor organisation, it is critical to have a single consolidated Configuration Management Database (CMDB), so that there is only one point of reference for impact analysis and a single view of the end-to-end



Figure 2: SIAM tooling – key areas



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IT services delivered. However defining, building and maintaining this model can be extremely challenging for an IT organisation.

From my experience of CMDB implementation, I would recommend taking the following two steps, which will help to reduce this complexity:

1. Define the CMDB data model, which describes the Configuration Items (CIs), attributes, and the initial data load and data maintenance mechanisms for each CI
2. Reduce the circumstances where suppliers are using their own CMDB and then updating the SIAM CMDB. Separate CMDBs can be effective for maintaining CI data accuracy, but this approach fails completely when attempting to maintain the dependencies and relationships between CIs. Whilst many suppliers will need to use their CMDB as part of a broader shared service offering, the risk of CI data inaccuracy as a result is a very real one

• End-to-end workflow

This functionality enables the definition of complex workflows, which simultaneously support the allocation of tasks to multiple resolvers, perhaps on different tools. This is particularly important in a multi-vendor environment, given that any incident, request or problem is likely to require multiple parties to be involved in its resolution/fulfilment. In the case of change management, the process can become more complex, as reviewers and approvers of a given change will be drawn from the entire supplier eco-system, and as such there are multiple 'calls' out from the SIAM tool to the supplier eco-system at each stage of the change process.

A failure to create an end-to-end workflow across the supplier eco-system will mean either manual data entry or manual processing is necessary, which will slow down the process and introduce the risk of errors occurring. Ultimately, this will reduce the speed with which incidents can be implemented, changes assessed, authorised and implemented or user service requests fulfilled.

• Common data dictionary

The tool set needs to reference a common data dictionary whereby data such as incident priorities, change types, and request catalogues follow common definitions and data values. This will avoid the need for data translation across groups and thus reduce the risk of information being lost in translation.

The common data dictionary is best defined in an interface control document, which describes, at field level, the contents of each ticket type and the CMDB CIs and their attributes. The interface control document also needs to describe the relevant data transmission protocols that allow ticket and configuration data to pass between the SIAM ITSM tool and the tools being used elsewhere in the vendor eco-system. This is critical to

ensure that service providers in the eco-system can work together collaboratively, using the service management tool as the single source of record for all of their work.

Discovery

Above, we made reference to the CMDB and emphasised its importance. However, we also need to understand how data gets in there and how it is maintained. This is critical to ensure that the CMDB data is complete and accurate, as the CMDB will be used across the SIAM eco-system for impact analysis of incidents, problems, and prospective changes.

“In a SIAM environment, discovery can become an extremely contentious subject.”

In order to achieve and maintain CMDB accuracy, initial data loads and the auditing of CMDB content should be undertaken using a discovery toolset. These can range from simple 'asset' discovery, right through to complex application dependency mapping tools, which provide end-to-end service views based upon the components discovered.

In a SIAM environment, discovery can become an extremely contentious subject. The need for it is undisputed, but each service provider in the eco-system is likely to have their own discovery tool, and will want to insist that this is used, as they will trust their solution and have staff trained in its operation.

Ideally, you need to impose a single tool set here, to reduce the CMDB integration challenges that arise when you try to populate the CMDB from multiple discovery sources. In addition, if you accept an 'anything goes' approach to discovery tooling you may end up with tools that cannot transmit to the CMDB effectively or that are unable to capture valuable data about the relationships between CIs. This could negatively impact upon the wider business by reducing the availability of service-focused CMDB data. Remember, if the CMDB is inaccurate or incomplete, critical impact analysis decisions could be made on

incidents or prospective changes which are based on false data. This will eventually lead to service unavailability, reputation damage and customer dissatisfaction.

Software asset management

Allied to discovery is the need not only to manage the hardware assets, but also the software assets and particularly the licensing. In a SIAM environment, this is more complex due to the fact that:

- Suppliers in the eco-system may each retain some software licensing responsibility, but it is generally the organisation using the software which has the software liability.
- There is often a need to consolidate software entitlement and usage data across systems managed by multiple vendors.

In order to combat/pre-empt these issues, I recommend that the SIAM organisation maintains a central software asset management tool that is able to receive and analyse data from multiple sources in order to create a single, consolidated organisation-wide view.

Event management

A requirement that is often overlooked due to the focus on ITSM tooling is the ability to correlate events generated elsewhere in the SIAM eco-system and apply a service view to these. In other words, if a technology component fails, which service is impacted by the failure? Another way to look at this is that the SIAM layer is service-focused, whereas the technical towers are infrastructure-focused. The SIAM function needs a correlation tool to enable it to perform the service integration role effectively

Due to the siloed nature of the SIAM sourcing model, the service providers in the SIAM eco-system are unlikely to possess the full end-to-end view of the all the infrastructure and application components that come together to form the service. This information is typically found within the CMDB. The relationships between these 'physical' CIs and their logical counterparts, such as business processes and services, should also be contained within the CMDB but this is seldom the case because of the complexity involved in obtaining information about services and the infrastructure upon which it runs.

This issue needs addressing because, in a complex SIAM model, a service-orientated CMDB will improve incident impact analysis and improve change impact assessment. Failure to build this 'single version of the truth' CMDB could lead to unexpected service failures, business productivity impact, dissatisfied users and reputational damage. To combat this issue application dependency mapping is required to supplement the information relating the physical CIs to the business applications, operations and processes so that the complete service can be mapped, dependent infrastructure items

identified and impact analysis performed effectively.

The recent failure of Royal Bank of Scotland systems further supports this need. In this case, not only did they suffer from all of the adverse impacts above, they also received a massive regulatory fine.

One CIO I know gave a great reason for needing this functionality by saying: “when my phone rings, the event correlation tooling will tell me why it’s ringing before I pick up”. I thought this really summed up why this tooling was required.

Reporting

A common problem in a SIAM organisation is the production of reports, because there is a tendency for reporting to become all consuming, with a myriad of reports all showing supplier and service performance metrics which often mean little to the business. Reporting can easily become a ‘cottage industry’ in its own right. There is a simple way to address this which we will look at below but first let’s consider the different types of reporting, which tend to fall into a number of categories, as follows:

• Vendor-focused commercial reporting

This describes how the vendor is performing against their commercial SLAs and KPIs, and describes the overall commercial picture, highlighting where measures have been achieved and describing where failures have occurred and why they happened

• Vendor-focused service reporting

This focuses on the performance of the services provided by the vendor, in terms of SLA performance, for example the processing of incidents, problems and changes

• Business-focused volumetric reporting

This focuses on the number of tickets raised during the reporting period, and provides trending over time. In my opinion, there is limited value in this type of reporting, but it is surprisingly common! The fact is that this type of reporting is quantitative rather than qualitative, and is therefore fairly one-dimensional in nature.

• Business-focused service reporting

This tends to focus on the performance of the business in terms of end-to-end services, and is perhaps the most useful in giving business insight into the quality of service being provided.

Ideally, reporting will be largely sourced from the service management tool, which should act as the single authoritative source of ticket data from across the SIAM eco-system. This ‘single source of truth’ reduces the need for manual data manipulation and provides a sound and trusted basis for all reporting.

Where the service management tool is not sufficient to meet the reporting needs, it may be appropriate to supplement this with a specialist reporting tool with sophisticated

data analytics capabilities. However, this is likely to require a significant amount of configuration and user training before the organisation can receive valuable management information from it. In my experience, the configuration effort pays dividends in the long term. However, be sure to build the analytics capabilities gradually to ensure they are sustainable, and ensure that there is strong governance in place to manage requirements. Failure to do this could result in the organisation meeting every reporting requirement presented to it but failing to provide business value through the provision of insightful and useful content.

“Above all else, remember that SIAM tooling is there to support the SIAM strategy.”

Capacity management

Commonly, the service providers in the SIAM eco-system will each have a responsibility to deliver capacity data to the SIAM organisation. Typically this will be ‘tower-focused’ data, which focuses on the infrastructure or applications within that service provider’s tower. In ITIL terms, we would call this resource/component capacity data.

This data needs to be consolidated and brought into service views, so that you can really gain some confidence that your business processes and services have sufficient capacity to meet the planned needs of the business. This is the role of the SIAM organisation, and the tooling that performs this consolidation should be managed by the SIAM organisation.

However, the means by which this is achieved needs clarification. In essence, what we are hoping to achieve is to take all this component-focused data, apply a service lens to it and produce capacity reporting, which will allow us to demonstrate to the business either that all is well for the foreseeable future or, more commonly, that they need to invest in some new infrastructure to meet the growth plans of the service.

Conclusion

So, having drawn a clearer picture of the ‘shopping list’ required for successful SIAM tooling, here are some tips for bringing this to reality:

- Define a **tooling strategy** which outlines what you need, who is going to own what tool, and how they will come together to meet the stated requirements
- Define a set of functional and non-functional **requirements** and **score** each potential vendor using a formal process
- Use a set formula and agreed common language for defining your requirements, selecting potential vendors and managing a **slick selection process**
- Don’t be tempted to go with the vendor with the shiniest brochures or the slickest salesman!
- Focus upon **interoperability** between tools, not just the tools themselves.

Remember that tooling is only one part of the challenge. **Tools** are configured to perform against defined processes. They are operated by **people** who are working within an effective and appropriate **organisation** model. The people, process and tools come together to deliver **outcomes**, which are managed by an over-arching **governance** model.

Above all else, remember that SIAM tooling is there to support the SIAM strategy. The original decision to embark upon a SIAM approach will have had its own set of objectives and outcomes it was looking to achieve. The implementation of the tooling strategy should seek to deliver against these objectives and outcomes. After all, it is likely that SIAM objectives which involve reducing complexity, improving service quality and efficiency, and improving end-user satisfaction will be largely delivered through an effective set of tools, processes and people deployed across the SIAM eco-system.



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