

SearchDataCenter.com **Data Center Decisions**

Welcome

Data Center Decisions Fall 2007, Chicago, IL
 10:15 – 11:15 AM Tuesday October 23, 2007
ITIL V3: What's New and How to Use it
 David Pultorak, CEO
 Pultorak & Associates

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What We Will Cover

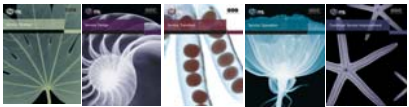
- What is ITIL, including changes from V2 to V3
- Why implement ITIL V3
- How to implement ITIL V3
 - Transitioning from V2 to V3
 - At the organization level
 - For individuals and teams
 - Tooling matters

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What Is ITIL?

- IT service management
- Best Practice guidance
- Quality approach and standards
- Consistent, comprehensive, hygienic
- Non-proprietary, platform-independent
- Flexible framework, intended to be adapted



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ITIL V2 Publications

- Service Support
- Service Delivery
- Security Management
- Infrastructure Management
- Application Management
- Planning to Implement
- The Business Perspective
- Small Scale Implementation

Other publications

- itSMF ITIL Pocket Guide**
ITIL Service Support and Delivery in capsule form
- Introduction to ITIL**
Core ITIL publications in capsule form

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ITIL V3 (Released June 2007) Provides More

- More consistent content and depth across topics
- More useful and applicable guidance in support of business needs
- More clarity on the link between best practices and business benefits / value and references to ROI
- More dynamic content / continuous update
- More full lifecycle articulation -- e.g., service design in addition to service support / delivery
- More focus on business processes and integrating IT services within business services

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ITIL V3 Reduces Core Volumes From 8 to 5


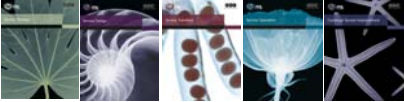
ITIL V2 Core Volumes	⇒	ITIL V3 Core Volumes
1. Service Support		1. IT Service Strategies
2. Service Delivery		2. IT Service Design
3. ICT Infrastructure Management		3. IT Service Transition
4. Application Management		4. IT Service Operations
5. Security Management		5. IT Service Improvement
6. The Business Perspective		
7. Planning to Implement Service Management		
8. ITIL Small-scale Implementation		

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ITIL V3 Publications

- Official Introduction to the ITIL Service Lifecycle
- ITIL Lifecycle Core Library
 - Service Strategy
 - Service Design
 - Service Transition
 - Service Operation
 - Continual Service Improvement

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Changes in ITIL V3

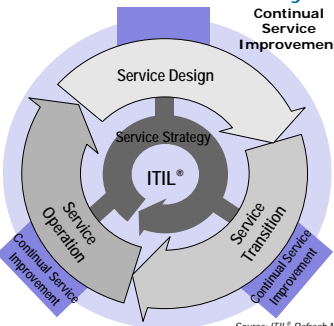
- The body of knowledge
 - Service Lifecycle concept and the reorganization of the V2 Service Support and Service Delivery processes around its five phases
 - New concepts, processes and functions
 - New library structure: Core set of books + complimentary / dynamic materials (hardcopy and Web) which focus on implementation and technology or application specific issues
- The qualification scheme
 - More levels of qualifications
 - Different entity in-charge of accreditation

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ITIL V3 Service Lifecycle



- **Service Strategy** – envisioning and conceptualizing the set of services which help achieve business objectives
- **Service Design** – designing the services with utility and warranty objectives in mind
- **Service Transition** – moving services into the live production environment
- **Service Operation** – managing services on an ongoing basis to ensure their utility and warranty objectives are achieved
- **Continual Service Improvement** – evaluating services and identifying ways to improve their utility and warranty objectives

Source: ITIL® Refresh News, 2011

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Service Strategy

- How to design, develop and implement service management not only as an organizational capability but also as a strategic asset
- Key Topics:
 - Strategic Assets, Service Utility and Warranty
 - Service Portfolio, Service Catalog
 - Service Assets
 - Market Spaces
 - Service Economics: ROI, Financial, Service Portfolio, Demand Management
 - Service Model



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Service Design

- How to design and develop services and service management processes, converting strategic objectives into portfolios of services and service assets
- Key processes
 - Service Level Management
 - Service Catalog Management
 - Availability Management
 - IT Service Continuity Management
 - Information Security Management
 - Supplier Management
- Other areas of concern:
 - Service sourcing alternatives



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Service Transition

- How to take designed services into the live environment
- Key Processes:
 - Change Management
 - Service Asset and Configuration Management
 - Knowledge Management
 - Transition Planning and Support
 - Release and Deployment Management
 - Service Testing and Validation
 - Evaluation
- Managing organizational and cultural change




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Service Operation

- How to successfully manage a service through its production life through daily management
- Key Processes:
 - Event, Request, Incident and Problem Management
- Key Functions:
 - Service Desk, IT Operations, Technical and Application Management
- Balancing conflicts in Service Operation



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Continual Service Improvement

- How to create and maintain value for customers through better design, introduction and operation of services
- Processes involved in identifying and introducing Service Management improvements:
 - Service Level Management
 - The Seven-Step Improvement Process
- Other topics:
 - The Plan-Do-Check-Act model
 - The Continual Service Improvement Model
 - The concepts of business value, baselines and metrics



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ITIL V3 Processes and Function in the Lifecycle

Legend: From ITIL V2 | New in ITIL V3 | Functions

From ITIL V2: Supplier Management, Service Catalog Mgmt., Information Security Management, Strategy Generation, Demand Management, Service Portfolio Mgmt., Financial Management, Knowledge Management, Evaluation, Service Validation & Testing, Transition Planning & Support, Release and Deployment Mgmt., Service Asset and Configuration Mgmt., Change Management, IT Operations Management Function, Application Management Function, Technical Management Function, Request Fulfillment, Event Management, Access Management, Problem Management, Incident Management, Service Desk Function.

New in ITIL V3: IT Service Continuity Management, Capacity Management, Availability Management, Service Level Mgmt., 7-Step Improvement Process, Service Reporting, Service Measurement.

Functions: IT Operations Management Function, Application Management Function, Technical Management Function, Request Fulfillment, Event Management, Access Management, Problem Management, Incident Management, Service Desk Function.

Processes: Supplier Management, Service Catalog Mgmt., Information Security Management, Strategy Generation, Demand Management, Service Portfolio Mgmt., Financial Management, Knowledge Management, Evaluation, Service Validation & Testing, Transition Planning & Support, Release and Deployment Mgmt., Service Asset and Configuration Mgmt., Change Management, IT Service Continuity Management, Capacity Management, Availability Management, Service Level Mgmt., 7-Step Improvement Process, Service Reporting, Service Measurement.

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ITIL Library Changes in V3

- Core Library: Five books, one for each Lifecycle phase
- Plus: Official Introduction to ITIL Service Lifecycle book
- Complimentary Materials
 - Supporting books, brochures, documents, other info
 - Aimed at specific audiences (e.g., CIOs, IT Pros)
 - Addresses application of generic guidance to particular markets or technologies
- Dynamic Guidance
 - Through Web-based materials for more
- Study aids for the Foundations and other examinations

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ITIL Qualification Scheme Changes in V3

- Two tracks to pursue
 - ITIL V3 track
 - ITIL V2 to V3 track for certified V2 professionals
- ITIL V3 qualifications more modular, adaptable to the specific career path of the IT Professional
- Two ITIL V3 diplomas
 - ITIL V3 Diploma
 - Advanced Service Management Professional Diploma

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ITIL V3 Track

Advanced SM Professional Diploma

ITIL Diploma Achieved

Minimum 22 credits needed to achieve Diploma

Managing through the Lifecycle (5 Credits)

Capability Stream (5 Credits)

ITIL Service Lifecycle Modules (15 Credits): SS, SD, ST, SO, CSI

ITIL Service Capability Modules (16 Credits): P&R, O&S, M&C, D&O

ITIL Foundation for Service Management (2 credits)

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ITIL V2 to V3 Track Details

- Individuals can gain credits for ITIL V2 and V3 courses
- Existing V2 qualifications have corresponding credits
- Foundation level bridging course: V3 Bridge
 - Covers differences between V2 and V3
 - Exam to test understanding of ITIL V3 approach
- Intermediate level bridging course: V3 Manager Bridge
 - For ITIL V2 Manager, to gain the ITIL V3 Diploma if exam is passed
 - 3-day course, covers new concepts in ITIL V3 and fully integrates the benefits of the lifecycle approach

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Why Transition to ITIL V3?

- Focus of IT Service Management is growing
 - Increased use of service providers outside of the IT organization (outsourcing, in sourcing, multi-sourcing)
 - Increase direct tie of business services to IT services
 - Globalization
 - Virtualization
- Best practices of ITIL V2 may no longer be valid
 - Many V2 practices now just common not best practices
 - Need to identify new and emerging best practices for today's IT environment

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Why Transition to ITIL V3?

The past (V2)	The present and future (V3)
Business and IT <u>alignment</u>	Business and IT <u>integration</u>
Value <u>chain management</u>	Value <u>network integration</u>
<u>Linear service catalogs</u>	<u>Dynamic Service Portfolios</u>
Collection of <u>integrated processes</u>	<u>Holistic Service Management lifecycle</u>

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Why Transition to ITIL V3? Key Benefits

- V3 improves on usefulness and applicability of ITIL in support of current business and technology landscape
 - Updated with new scenarios brought about by new technologies (e.g., outsourcing, Internet)
- V3 makes link between employment of best practices and their business benefits more visible, easier to show
 - Addresses business issues and concerns (e.g., financial justification, strategic planning)
- V3 gives more consistent content / depth across topics
 - More scalable too, for use in organizations of all sizes

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How ITIL V3 Affects Service Management Practices

- Integration of business strategy with IT service strategy
- Enables agile service design and ROI blueprint
- Provides transition models that are fit for purpose
- De-mystifies service provider management and sourcing
- Eases service implementation and management in dynamic, high-risk, volatile business environments
- Improves the measurement and demonstration of value
- Identifies triggers for improvement and change

Source: ITIL® Refresh Newsletter, 1st Edition

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How to Transition From V2 to V3

- Upgrade skills and knowledge
 - Get trained on ITIL V3 Foundations
 - Continue with ITIL V2 Practitioner training if already needed since V3 equivalent not yet released
 - Take V2 to V3 bridging courses when available
 - Read the V3 books which are available from:
<http://www.tsoshop.co.uk/bookstore.asp?DI=583769>
- Change practices within the organization
 - Continue with existing ITIL V2 processes in place
 - Get senior IT managers to start understanding the Service Lifecycle to begin implementing new and upgrading existing V2 processes and functions

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Implementing ITIL – Organization Level A CSIP Is An Organization-level ITIL Initiative

- Continuous Service Improvement Program (CSIP)
- 'An ongoing formal program undertaken within an organization to identify and introduce measurable improvements within a specified work area or work process'
- Differs from a Service Improvement Program (SIP) as it's
 - Proactive
 - Ongoing

Source: Planning to Implement Service Management

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Implementing ITIL – Organization Level CSIP Objectives

- Implementing, managing, supporting, and continuously improving service management processes
- Aligning people, process, and technology within a governance framework

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Implementing ITIL – Organization Level Steps To Planning To Implement ITIL

1. What is the Vision?	High Level Business Objectives
2. Where are we now?	Assessments
3. Where do we want to be?	Measurable Targets
4. How do we get where we want to be?	Process Improvement
5. How do we check our milestones have been reached?	Measurements and Metrics
6. How do we keep the momentum going?	


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Implementing ITIL – Organization Level What Is The Vision?

- Review high level business objectives
- Define the vision for the project
- Involve the right people in the project
- Gain senior management commitment
- Include people, processes, technology and governance




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Implementing ITIL – Organization Level Where Are We Now?

- Focus on cost-justifiable quality improvement
- Assess current service and processes
 - Compare against ITIL best practices
 - Talk to customers and IT staff
 - Perform Customer Satisfaction Surveys (CSS)
- Identify maturity, potential for improvement




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Implementing ITIL – Organization Level Where Do We Want To Be?

- Some organizations may require major change
- The assessment will:
 - Identify maturity of the organization
 - Identify business needs
 - Identify priorities
- Look at short-, medium- and long-term improvement strategies
- Identify possible 'quick wins'




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Implementing ITIL – Organization Level How Do We Get There?

- Implement 'quick wins'
- Start simple, adopting a phased approach
- Involve customers
- Communicate to all concerned
- Manage the changes, and explaining what is being done (and why) to everyone involved or affected




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Implementing ITIL – Organization Level How Do We Know When We Get There?

- Define objectives with measurable targets
- Set goals for later comparison of achievement
- Set and agree Critical Success Factors (CSFs)
- Set Key Performance Indicators (KPIs)
- Conduct Customer Satisfaction Surveys (CSS)



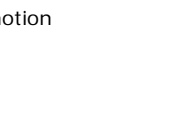
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Implementing ITIL – Organization Level How Do We Keep The Momentum Going?

- Mark phases by taking stock and celebrating success
- Introduce more change, not less, fueled by quick wins
- Focus on maintaining clarity of purpose
- Make it "How we do things around here"
- Discuss and validate the new practices
- Choose well on succession and promotion
- Plan next phase of CSIP




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Implementing ITIL – Organization Level Common Mistakes and Where Practical Guidance is Needed

- Common Mistakes
 - Lack of appreciation for or ability in organizational change leadership and management
 - Lack of a clear vision and goals that map to business need
 - Mistakes in the area of organizational structure
 - Ineffective program and project management
 - Ineffective use of training, tools and knowledge management
- Where Practical Guidance is needed
 - Leading and Managing Organizational Change
 - Program and project management
 - Managing through goals and metrics
 - Capability determination and improvement planning
 - Performance support




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Implementing ITIL – Individuals and Teams Individual And Team Effort Are Required

- For service management to 'stick,' concepts must be applied throughout the value chain, not just for end-services customers
- Individual and team efforts are required, just like the bottom slice of bread on a sandwich -- they keep the initiative from getting messy and falling apart




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Implementing ITIL – Tooling Matters Because Tools Matter

- Good people and process are necessary, but not sufficient for effectiveness
- How you implement matters -- not process before tool, or v.v., but process and tool together
- Getting the best value from your technology investment starts with choosing the right technology to begin with




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Implementing ITIL – Tooling Matters Because Tools Matter

- Packages vary in their ease of implementation, functionality and support for integration with people and ITIL best practices
- Choice of technology for infrastructure and tools to manage it is crucial
- Configuration of tools to support process is critical
- 'Installation' of tools into the organization is vital



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Session Summary

- ITIL is recognized internationally as the leading best practice IT service management framework.
- ITIL V3 is a fundamental re-write that introduces a services lifecycle, new content and structure that includes complimentary materials, a vehicle for dynamic / interim updates and a new certification scheme.
- Consider transitioning to V3, as V2 is 5-7 years old and in some cases is no longer best / current / relevant practice.
- Transitioning to V3 requires skills and knowledge updates, including bridging courses, and strategy for bridging from existing V2 processes and functions to V3.

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Session Summary (continued)

- Effective implementation of ITIL best practices at the organization level requires a stepwise approach called a Continuous Service Improvement Program.
- Implementing ITIL can be done at the individuals and team levels, and should be done to ensure superior results in organization-level implementations.
- While people, process and governance aspects are also vital, tooling choices -- from which tools to choose in the first place, to how to configure them to support ITIL processes, to how to 'install' them in the organization -- matter when implementing ITIL.

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Call to Action

- Learn more about ITIL V3 and IT service management
 - Visit www.pultorak.com and searchcio.techtarget.com for the latest information on ITIL for the Data Center
 - View SearchCIO / Pultorak virtual conference content
 - What's Key in ITIL V3
 - ITIL V3 Core Practice Book 1: Service Strategies
 - ITIL V3 Core Practice Book 2: Service Design
 - ITIL V3 Core Practice Book 3: Service Transition
 - ITIL V3 Core Practice Book 4: Service Operation
 - ITIL V3 Core Practice Book 5: Continual Service Improvement
- Consider implementing ITIL V3 in your organization
 - Contact Pultorak & Associates at (206) 729-1107 info@pultorak.com

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For More Information

- ITIL Service Management
 - www.pultorak.com
 - <http://www.itil.co.uk>
 - searchcio.techtarget.com
- Service Management Tools
 - www.toolselector.com


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Questions and Answers

Ask The Expert booth today
12:30PM-1:30PM

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