



# Introductory Overview of ITIL® 4

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# Acknowledgements

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## About this guide

ITIL® provides a framework of best-practice guidance for IT service management and, since its creation, ITIL has grown to become the most widely accepted approach to IT service management in the world.

This pocket guide has been designed as an introductory overview for anyone who has an interest in or a need to understand more about ITIL 4 and its qualification scheme. While this guide provides an overview, full details can be found in the actual ITIL 4 publications themselves.

The guidance contained within this publication is neither definitive nor prescriptive, but is based on ITIL best practice. The guidance in the ITIL publications is applicable generically and is of benefit to all IT organizations, irrespective of their size or the technology in use. ITIL best practice is neither bureaucratic nor unwieldy if utilized sensibly and in full recognition of the business needs of the organization.

Note that this is an overview publication, and is not designed to replace official guidance or support training. Further information can be found at <https://www.axelos.com/best-practice-solutions/itil>.

# 1 Introduction

Information is increasingly recognized as the most important strategic resource that any organization has to manage. Key to the collection, analysis, production, and distribution of information within an organization is the quality of the IT services provided to the business.

Services create and provide value for organizations and their customers. Most services today are IT-enabled, which means that the quality of IT service management capabilities can impact the level of value achieved.

Technology advancements mean that IT has become a significant business driver, often delivering competitive advantage, raising the profile of IT service management to a strategic capability. To remain successful, many organizations are undertaking major transformational programmes to exploit these opportunities, often referred to as 'digital transformations'. Through such transformations, information and technology are becoming fully integrated across organizations, breaking down silos and driving an increasing need for operational agility and velocity.

Service management is evolving to address and support these organizational needs. As service management is evolving, so is ITIL, the most widely adopted guidance on IT service management in the world. ITIL advocates that IT services should be aligned with the needs of the business and support its core processes.

ITIL provides guidance and helps service providers to:

- support business objectives
- enable business change
- manage risk in line with business needs
- optimize customer experience



- facilitate value for money
- drive operational agility and velocity
- leverage digital services
- drive continual improvement.

ITIL 4 provides a holistic framework for best-practice IT service management. It introduces the service value system (SVS) to represent how different components and activities of the organization work together to facilitate value creation through IT-enabled services.

Within this guidance:

- Chapter 1 gives a general introduction
- Chapter 2 introduces the concept of service management
- Chapter 3 presents an introduction to ITIL best practice
- Chapter 4 provides an overview of the key concepts that underpin ITIL 4
- Chapter 5 outlines the four dimensions of service management and their key role in effective services
- Chapter 6 outlines the SVS, including:
  - the ITIL guiding principles, which can guide an organization's decisions and actions, ensuring a shared understanding and common approach to service management across the organization
  - the ITIL service value chain (at the heart of the SVS), which defines interconnected activities that an organization performs to deliver a valuable product or service to its consumers and to facilitate value realization
  - the ITIL management practices, comprising the organizational resources designed for performing work or accomplishing an objective

- Chapter 7 outlines the ITIL 4 certification scheme, providing a modular approach to the ITIL framework, allowing candidates to focus their studies on key areas of interest
- Chapter 8 describes related guidance useful for further information
- Chapter 9 summarizes ITIL 4 and the benefits it can deliver.

ITIL's capabilities provide a range of key benefits for both the organization and the professional.

## 2 What is service management?

To understand what service management is, we need to understand what services are, and how service management can help organizations to deliver and manage these services.



### Definition: Service

A means of enabling value co-creation by facilitating outcomes that customers want to achieve, without the customer having to manage specific costs and risks.

The services that an organization provides are based on one or more of its products. Organizations own or have access to a variety of resources, including people, information and technology, value streams and processes, and suppliers and partners. Products are configurations of these resources, created by the organization, that will potentially be valuable for its customers.

Service management enables a service provider to understand the services it is providing, ensuring that the services really do facilitate the outcomes its customers want to achieve. It also enables the service provider to understand the value delivered by these services, and to manage all of the costs and risks associated with them.



## Definition: Service management

A set of specialized organizational capabilities for enabling value for customers in the form of services.

Developing the specialized organizational capabilities mentioned in the definition requires an understanding of:

- the nature of value
- the nature and scope of the stakeholders involved
- how value creation is enabled through services.

The ITIL SVS addresses these needs and enables the co-creation of value through the delivery of products and services.

Adopting best practice can help a service provider to create an effective service management system. Best practice is simply doing things that have been shown to work and to be effective. Best practice can come from many different sources, including frameworks (such as ITIL, COBIT® and SIAM®), standards (such as ISO/IEC 20000 and ISO 9000), and proprietary knowledge of people and organizations.

# 3 What is ITIL?

ITIL is a framework that describes best practice in IT service management, drawn from international public and private sectors. It provides a framework of comprehensive, practical, and proven guidance for establishing an IT service management system, encouraging consistency and continual improvement for businesses using IT-enabled services.

ITIL is the globally recognized leader in IT service management. It offers common concepts and vocabulary, aligned with international standards, to ease collaboration across departments, organizations, geographies, and providers. This results in increased effectiveness and efficiency, delivering value across the business.

ITIL enables organizations and individuals to gain optimal value from IT and digital services. It helps to define the direction of a service provider with a clear capability model, and aligns it with the business strategy and customer needs.

ITIL was initially developed in the 1980s, and consisted of a library of several books covering all aspects of IT service provision. Its early use was principally confined to the UK and The Netherlands. Between 2000 and 2004 this initial version was revised and replaced by ITIL V2, consisting of two core publications covering 10 processes and the service desk, supported by a number of closely connected books consolidated within an overall framework.

Following a major 'refresh', ITIL v3 was published in 2007, consisting of five core publications covering the service lifecycle, with an update in 2011. Each of the five core publications covered a stage of the service lifecycle, from the initial strategy and design (*ITIL Service Strategy* and *ITIL Service Design*), through migration into the live environment (*ITIL Service Transition*), to live operation and improvement

(*ITIL Service Operation* and *ITIL Continual Service Improvement*).

The service lifecycle provided a framework to manage the end-to-end lifecycle of services, consisting of 26 processes, supported by four organizational functions, and aligned with the ISO/IEC 20000 Service Management standard.

ITIL 4 is the latest evolution of ITIL. Launched in 2019, it reshapes the established ITIL practices in the wider context of customer experience, value streams, and digital transformation, while embracing new ways of working, such as Lean, Agile, and DevOps. It ensures continuity with existing ways of working (where successful) by integrating modern and emerging practices with established and proven know-how, and provides guidance on the benefits and adoption of these new methods with minimal disruption.

ITIL 4's holistic approach elevates the profile of service management in an organization to a more strategic level, focusing on delivering value, while offering a flexible, coordinated, and integrated system for the effective governance and management of IT-enabled services. The ITIL publications are, however, just the starting point for ITIL.

ITIL 4 is a professionally recognized certification scheme, providing a structured approach for developing IT service management competencies. As it has evolved from ITIL v3, there is a clear transition path from one scheme structure to the other, enabling practitioners to continue their ITIL journey. There is also a range of complementary publications and guidance, including:

- qualification scheme guidance and syllabuses
- revision guides, such as *ITIL 4 Foundation Revision Guide*
- white papers and case studies
- MyITIL (available via subscription) with supplementary contents such as tutorials, templates and ITIL management practices.

For more details see <https://www.axelos.com/itil>.

# 4 Key concepts of ITIL 4

The purpose of an organization is to create value for stakeholders. Value is defined as the perceived benefits, usefulness, and importance of something, and is co-created through active collaboration between service providers, consumers, and other organizations within the service relationships.

Service providers can be internal and/or external.

Service consumers can include customers who define service requirements and are responsible for service outcomes; users who consume the service; and a sponsor who authorizes the budget for service consumption.

A service relationship is defined as the cooperation between a service provider and service consumer; this includes service provision, service consumption, and service relationship management. In a service relationship, organizations can be service providers or service consumers. However, these roles are not mutually exclusive; organizations can both provide and consume services at any given time.

Service providers help their consumers to achieve outcomes. Achieving desired outcomes requires resources (costs) and often risks. Therefore, service providers can take on some of the associated risks and costs from service consumers. Service relationships can also introduce new risks and costs, which can sometimes negatively affect some of the intended outcomes while supporting others.

Figure 4.1 shows that achieving outcomes is a balancing act. Service relationships are only seen as valuable when there are more positive than negative effects for all parties involved.

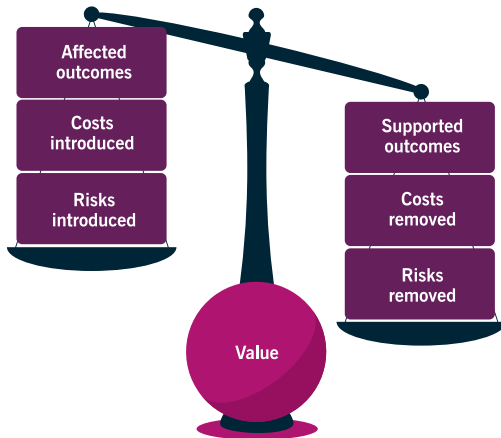


Figure 4.1 Achieving value: outcomes, costs, and risks

To offer value to a customer, an organization designs services based on one or more of its products. Products are created through combinations of an organization's resources, including people, information and technology, value streams and processes, and suppliers and partners.

The value of a product or service to a customer is influenced by the combination of its utility (its fitness for purpose) and its warranty (its fitness for use). Both utility and warranty must exist to provide value to the customer, because customers cannot derive benefit from something that is fit for purpose but not fit for use (or vice versa).

These key concepts, which underpin the ITIL 4 framework, apply to all organizations and services, regardless of their nature or technology.



# 5 The four dimensions of service management

There are four dimensions of service management, as illustrated in Figure 5.1.

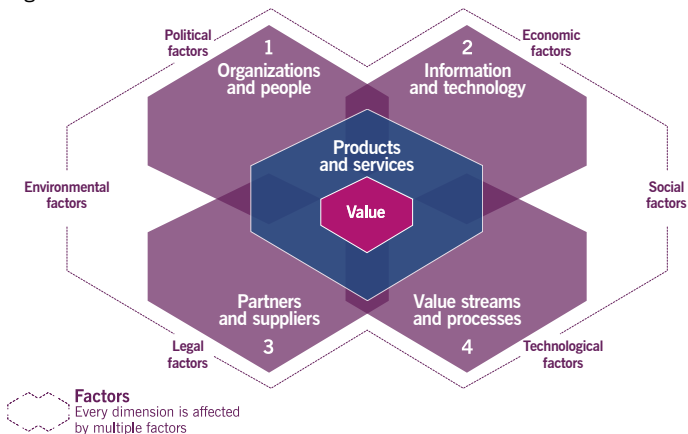


Figure 5.1 The four dimensions of service management

These four dimensions provide different perspectives of service management. Together they support a holistic approach that impacts all areas of the SVS. Unless all four dimensions are addressed, an organization might fail to achieve its desired outcomes. For example, process improvements without proper consideration for people, partners or technology, or technology that is implemented without due care for people or processes, might result in services becoming undeliverable or inefficient to run.

However, no organization operates in isolation, and Figure 5.1 shows a range of external factors that can affect each dimension. Organizations should ensure a balanced focus between each dimension.

## 5.1 Organizations and people

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Organizations are becoming ever-more complex; therefore they need to be structured and managed with care, and their culture needs to be aligned with their objectives and the right level of human capability and capacity.

An organizational structure can also include customers, service providers, supplier employees, and other stakeholders in the service relationship.

People considerations for an organization should include such aspects as managing skills and competencies, clear roles and responsibilities, leadership styles and communications, and a culture that encourages collaboration, helping individuals to understand their contribution in the creation of value for customers and stakeholders.

## 5.2 Information and technology

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This dimension considers the information and knowledge needed, along with the technologies required, to both manage and deliver the services.

Technologies that support service management encompass applications, databases, communications, workflow systems, and knowledge bases, complemented by new techniques and developments such as artificial intelligence, mobile platforms, and cloud computing. The culture and nature of the business will impact the choice of technologies used. For a specific IT service, this includes the information created, protected, managed, used, and archived in the course of service provision and consumption.

For many services, information management is the primary means of enabling customer value (e.g. by enabling an organization to access and maintain accurate information).

This dimension also considers challenges such as security and regulatory compliance.

## 5.3 Partners and suppliers

---

This dimension considers an organization's relationships, contracts, and agreements with other organizations involved in the design, delivery, and support of services.

Every organization and every service depend to some extent on the services provided by other organizations. Relationships between organizations can vary in levels of integration and formality, ranging from formal service provider or customer contracts, to flexible partnerships where parties may work together. One model an organization can use to address this dimension is service integration and management (SIAM).

Key factors involved in making the right sourcing and supplier management decisions are considered, such as strategic focus, corporate culture, cost effectiveness, specialist knowledge, and variable demand for services.

## 5.4 Value streams and processes

---

This dimension defines the activities, workflows, controls, and procedures needed to achieve agreed objectives. Value streams and processes are concerned with how the various parts of the organization work together to enable value creation through products and services (i.e. how the delivery model for a service works to achieve agreed outcomes).

A value stream is a series of steps undertaken to create and deliver products and services to consumers. Reviewing and mapping value streams can help an organization to identify opportunities to improve productivity.

A process is a set of interrelated activities that transform inputs into outputs. Processes define the sequence of actions, their dependencies, and who is involved, with work instructions describing how the activities are carried out.

## 5.5 External factors

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Service providers do not operate in isolation; they are influenced by external factors that can impact how the dimensions operate. These include political, economic, social, technological, legal, and environmental factors (PESTLE), as shown in Figure 5.1.

These external factors constrain or influence how organizations address the four dimensions of service management.

# 6 The ITIL service value system

The ITIL SVS, as illustrated in Figure 6.1, shows how the key components and activities in a service work together to create and deliver value. The SVS enables integration, coordination, and a unified value-driven focus across the organization.

The SVS is triggered by opportunities (to add value) or demand from internal and external sources. This in turn enables value co-creation for a wide group of stakeholders through the delivery of products and services.

Each organization's SVS has interfaces with other organizations. These form an ecosystem that can facilitate value for all those organizations, their customers, and other stakeholders.

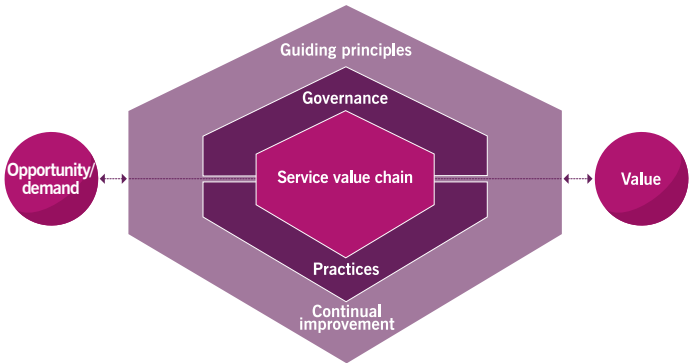


Figure 6.1 The ITIL service value system

## 6.1 The ITIL guiding principles

A guiding principle is a recommendation that guides an organization in all circumstances, regardless of changes in its goals, strategies, type of work, or management structure. A guiding principle is universal and enduring.

The guiding principles, as shown in Figure 6.2, embody the core messages of ITIL and service management, creating the foundation for an organization's culture and behaviour, from strategic decision-making to day-to-day operations in general. They also promote and support continual improvement across and at all levels within an organization.



Figure 6.2 The ITIL guiding principles

## 6.1.1 Focus on value

---

The core of this principle is that everything an organization does needs to map, directly or indirectly, to value for itself, its customers, and its other stakeholders. This means that the service provider needs to understand who is being served and what is of value to the service consumer; for example, this could be improved productivity, a more competitive position, reduced costs, meeting regulatory requirements, and/or the ability to pursue new markets.

Service consumers define value based on their own needs, and achieve it by contributing to the intended outcomes and optimizing their costs and risks.

The experience that service consumers have when they interact with the service and service provider is also an important aspect of value, frequently called customer experience (CX) or user experience (UX). CX is objective and subjective, and contributes to customer feelings about the organization, its products, and its services, so needs to be actively managed.

## 6.1.2 Start where you are

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The focus for this principle is that when creating something better, it can be tempting to start from scratch and build something completely new, eliminating old and unsuccessful methods. Not only can this approach waste time, but it can also lead to the loss of existing services, processes, people, and tools that could have significant value in the improved service. Before starting again, it is better to consider what is already available to be leveraged.

Organizations need to measure and understand the current capability to determine what can be re-used, ensuring that any measurements represent an accurate view; for example, there may be discrepancies

between reality and reports, or measures may not focus on the right aspects of service provision, driving poor behaviours.

### 6.1.3 Progress iteratively with feedback

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Observing this principle involves resisting the temptation to do everything at once. Even huge initiatives should be broken down and accomplished iteratively. Organizing work into smaller, manageable sections improves control and focus so they can be executed and completed in a timely manner.

Iterations can be timeboxed; they can be sequential or simultaneous, depending on the requirements and resources available. An iterative approach can deliver tangible results faster to the customer and business. Feedback can be used to improve the quality of iterations and to identify improvement opportunities, risks, and issues.

### 6.1.4 Collaborate and promote visibility

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The basis of this principle is that when initiatives involve the right people in the correct roles, the initiative benefits through better buy-in, more relevance (because better information is available for decision-making), and an increased likelihood of long-term success.

Collaborating across boundaries achieves greater engagement, support, and commitment from all stakeholders, improving their alignment and contribution towards objectives. This generates enduring outcomes that successfully deliver long-standing benefits.

Making work visible and sharing information across stakeholders supports a culture of openness, transparency, and trust, whereas insufficient visibility can introduce challenges and risks, including misunderstandings, hidden agendas, and poor decision-making.



## 6.1.5 Think and work holistically

---

The essence of this principle is that no service, practice, process, department, or supplier stands alone. Therefore, an organization's outputs will suffer unless the organization considers the service as a whole, rather than its separate parts individually. All the organization's activities should be focused on the delivery of value.

To deliver value, services need effective and efficient management, and the dynamic integration of information, technology, organization, people, processes, suppliers and agreements. Working holistically requires an end-to-end understanding of how demand is captured and translated into outcomes, and visibility of the ecosystem that is needed to successfully achieve the 'big picture'.

## 6.1.6 Keep it simple and practical

---

This principle recognizes that the simplest, most efficient method to achieve the desired outcome is likely to be the best one. This might seem obvious, but if ignored it can result in overly complex methods of work that rarely maximize outcomes or minimize cost.

Aim to reduce all activities to the fewest possible steps, using outcome-based thinking to produce practical solutions that deliver valuable outcomes. Processes, services, actions, or metrics that fail to provide value or produce useful outcomes should be eliminated.

## 6.1.7 Optimize and automate

---

This principle drives organizations to maximize the value of the work carried out by their human and technical resources by eliminating anything that is wasteful and leveraging technology wherever possible. In this way, human intervention only happens where it really contributes value.

Technology can help organizations to scale up and take on frequent and repetitive tasks, allowing human resources to be used for more complex decision-making. However, before an activity is automated, it should be optimized to be as effective and useful as possible. Practices such as ITIL, Lean, DevOps, and Kanban can be used to improve and optimize.

Automation enables technology to perform standard and repetitive tasks correctly and consistently, with limited or no human intervention; this saves organizational costs, reduces human error, and improves the employee experience.

## 6.2 Governance

---

Every organization, regardless of size or type, is directed by a governing body (i.e. a person or group of people who are accountable at the highest level for the performance and compliance of the organization). The governing body may be a board of directors or executive managers who take on separate governance roles when they are performing governance activities. The governing body is accountable for the organization's compliance with policies and any external regulations.

Organizational governance evaluates, directs, and monitors all the organization's activities, including those of service management. The role and position of governance in the SVS depends on how the SVS is applied in an organization; for example, the SVS can be applied to the whole or parts of an organization.

The organization's governing body should retain oversight of the SVS to ensure alignment with the organization's objectives and priorities.

## 6.3 Service value chain

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At the core of the SVS is the ITIL service value chain, as shown in Figure 6.3. This provides an operating model for the creation, delivery, and continual improvement of services. It defines six key activities that can be combined in many ways to form multiple value streams:

- **Plan** Ensures a shared understanding of the vision, status, and improvement direction across all four dimensions and for all products and services in the organization.
- **Improve** Ensures continual improvement of products, services, and practices across all value chain activities and the four dimensions of service management.
- **Engage** Provides a good understanding of stakeholder needs, transparency, and continual engagement and good relationships with all stakeholders.
- **Design and transition** Ensures that products and services continually meet stakeholder expectations for quality, costs, and time to market.
- **Obtain/build** Ensures that service components are available when and where they are needed, and meet agreed specifications.
- **Deliver and support** Ensures that services are delivered and supported according to agreed specifications and stakeholders' expectations.

The service value chain is flexible and can be adapted to multiple approaches, including DevOps, centralized IT, and multimodal service management. This adaptability enables organizations to react effectively and efficiently to changing demands from their stakeholders.

The flexibility of the service value chain is further enhanced by the ITIL practices, each of which supports multiple service value chain activities, providing a comprehensive and versatile toolset for IT service management practitioners.

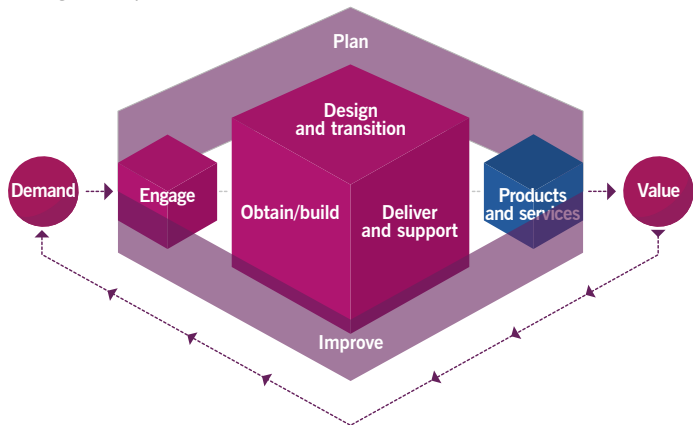


Figure 6.3 The ITIL service value chain

Value streams are specific combinations of activities and practices, each designed for a particular scenario. Organizations create value streams to carry out specific tasks or respond to specific scenarios or types of demand. These activities can be combined and integrated in a myriad of ways to create a ‘journey’ from demand to value that reflects how the service provider completes the work.

Techniques such as value stream mapping can help organizations to streamline and optimize their value streams.

## 6.4 ITIL management practices

A practice is a set of organizational resources designed for performing work or accomplishing an objective. All practices are subject to the four dimensions of service management, and each practice supports multiple service value chains.

There are three types of management practices: general, service management, and technical management, as shown in Table 6.1.

Table 6.1 The ITIL management practices

General management practices	Service management practices	Technical management practices
Architecture management	Availability management	Deployment management
Continual improvement	Business analysis	Infrastructure and platform management
Information security management	Capacity and performance management	Software development and management
Knowledge management	Change enablement	
Measurement and reporting	Incident management	
Organizational change management	IT asset management	
Portfolio management	Monitoring and event management	
Project management	Problem management	
Relationship management	Release management	
Risk management	Service catalogue management	
Service financial management	Service configuration management	
Strategy management	Service continuity management	
Supplier management	Service design	
Workforce and talent management	Service desk	
	Service level management	
	Service request management	
	Service validation and testing	

The ITIL 4 management practice guides have been created to aid users in understanding and adopting the practices, providing an overview of the structure, content, and key concepts. They also support the ITIL 4 qualification scheme.

All practice guides have a common structure for ease of access:

- General information
  - Purpose and description
  - Terms and concepts
  - Scope
  - Practice success factors
  - Key metrics
- Value streams and processes
  - How the practice contributes to service value chain activities
  - The processes and activities of the practice
- Organizations and people
  - Roles, competencies, and responsibilities
  - Organizational structures and teams
- Information and technology
  - Information exchange: inputs and outputs
  - Automation and tooling
- Partners and suppliers
  - Relationships with third parties involved in the practice
  - Sourcing considerations.

ITIL management practices are available via MyITIL (requires subscription) at <https://www.axelos.com/my-axelos/my-til>.

## 6.5 Continual improvement

Continual improvement takes place across all areas of the organization and at all levels, from strategic to operational. Service effectiveness is maximized when every person who contributes to delivering a service has a continual improvement mindset.



Figure 6.4 The ITIL continual improvement model

To support continual improvement at all levels, the SVS includes:

- the ITIL continual improvement model, as shown in Figure 6.4, providing a structured approach to implementing improvements across the organization
- the improve service value chain activity, embedding continual improvement into the value chain
- the continual improvement practice, supporting the organization's day-to-day improvement activities.

Using the ITIL continual improvement model increases the likelihood that IT service management initiatives will be successful, puts a strong focus on customer value, and ensures that improvement efforts can be linked back to the organization's vision.

Key steps in the model are:

- **What is the vision?** Each improvement initiative should support the organization's goals and objectives.
- **Where are we now?** The success of an improvement initiative depends on a clear and accurate understanding of the starting point and the impact of the initiative. A journey cannot be mapped out if the starting point is not known.
- **Where do we want to be?** Outlines what the target state for the next step of the journey should look like. A journey cannot be mapped if the destination is not clear.
- **How do we get there?** Creates the plan to execute the initiative, which can be a simple single step or a more significant and involved initiative, carried out in iterative steps.
- **Take action** Executes the plan for the improvement, adopting the most appropriate approach (e.g. waterfall or Agile).



- **Did we get there?** Checks whether the desired journey destination has been reached (i.e. have the expected value, outcomes, and benefits been achieved?). If not, what additional actions are required that may result in a new iteration?
- **How do we keep the momentum going?** Having delivered the expected value, the focus should now be on marketing successes and reinforcing any new methods. This is to ensure that the progress made will not be lost, and to build support and momentum for the next improvements.

The model supports an iterative approach to improvement, dividing work into manageable pieces with separate goals that can be achieved incrementally.

# 7 The ITIL 4 certification scheme

There are four levels within the ITIL 4 certification scheme, as shown in Figure 7.1.

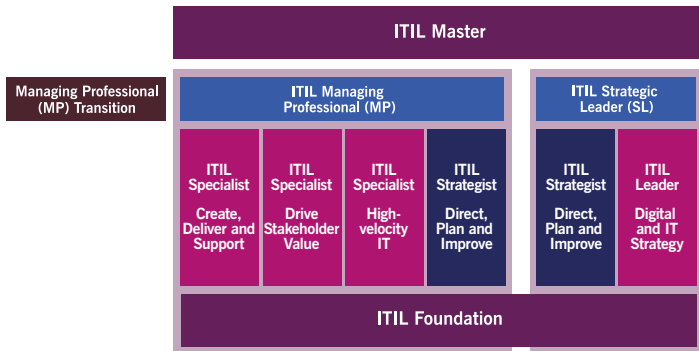


Figure 7.1 The ITIL certification scheme

## 7.1 ITIL Foundation

The ITIL 4 Foundation certification is designed as an introduction to ITIL 4 and enables candidates to look at IT service management through an end-to-end operating model for the creation, delivery, and continual improvement of IT-enabled products and services.

The target audience consists of:

- those who require a basic understanding of the ITIL framework
- those who want to understand how ITIL can be used to enhance IT service management
- IT professionals or others working within an organization that has adopted ITIL.

In addition to *ITIL® Foundation: ITIL 4 Edition* (AXELOS, 2019), a revision guide (*ITIL®4 Foundation Revision Guide*) is also available for candidates taking the ITIL 4 Foundation qualification. It has been specifically designed to support focused revision immediately before the examination. It is not intended to replace the more detailed ITIL Foundation guidance or to be a substitute for a course provider's training materials.

## 7.2 ITIL Managing Professional stream

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ITIL Managing Professional (ITIL MP) is a stream of four modules that provides practical and technical knowledge about how to run successful IT-enabled services, teams, and workflows.

All modules have ITIL 4 Foundation as a prerequisite.

The target audience consists of:

- IT practitioners working within technology
- digital teams across businesses.

To obtain the designation ITIL Managing Professional, the candidate must complete all four modules in this stream, with ITIL Strategist – Direct, Plan and Improve being a universal module for both streams.

The four modules are:

- ITIL Specialist – Create, Deliver and Support
- ITIL Specialist – Drive Stakeholder Value
- ITIL Specialist – High-velocity IT
- ITIL Strategist – Direct, Plan and Improve.

## 7.2.1 ITIL Specialist – Create, Deliver and Support

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### 7.2.1.1 Scope

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This module covers:

- core service management activities
- creation of services
- integration of different value streams and activities to create, deliver, and support IT-enabled products and services
- supporting practices, methods, and tools
- service performance
- understanding of service quality and improvement methods.

### 7.2.1.2 Target audience

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Practitioners who are responsible for:

- managing the operation of IT-enabled and digital products and services
- the end-to-end delivery of services.

### 7.2.1.3 Training

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Accredited training for this module is mandatory.

## 7.2.2 ITIL Specialist – Drive Stakeholder Value

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### 7.2.2.1 Scope

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This module covers:

- all types of engagement and interaction between a service provider and its customers, users, suppliers, and partners
- conversion of demand into value via IT-enabled services
- key topics such as service level agreement (SLA) design, multi-supplier management, communication, relationship management, customer experience (CX) and user experience (UX) design, and customer journey mapping.

### 7.2.2.2 Target audience

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Practitioners who are responsible for:

- managing and integrating stakeholders
- customer journey and experience
- fostering relationships with partners and suppliers.

### 7.2.2.3 Training

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Accredited training for this module is mandatory.

## 7.2.3 ITIL Specialist – High-velocity IT

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### 7.2.3.1 Scope

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This module covers:

- the ways in which digital organizations and digital operating models function in high-velocity environments

- operating in a similar way to successful digitally native organizations
- use of working practices such as Agile and Lean, and technical practices and technologies such as cloud, automation, and automatic testing, to enable rapid delivery of products and services.

### 7.2.3.2 Target audience

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IT managers and practitioners involved in:

- digital services or digital transformation projects working within or towards high-velocity environments.

### 7.2.3.3 Training

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Accredited training for this module is mandatory.

## 7.2.4 ITIL Strategist – Direct, Plan and Improve

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### 7.2.4.1 Scope

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This module covers:

- creating a ‘learning and improving’ IT organization, with a strong and effective strategic direction
- the influence and impact of Agile and Lean ways of working, and how they can be leveraged to an organization’s advantage
- practical and strategic methods for planning and delivering continual improvement.

### 7.2.4.2 Target audience

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Managers at all levels involved in shaping direction and strategy or developing a continually improving team.

Note: This is a universal module that is a key component of both the ITIL Managing Professional and ITIL Strategic Leader streams.

### 7.2.4.3 Training

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Accredited training for this module is mandatory.

## 7.3 ITIL Strategic Leader stream

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ITIL Strategic Leader (ITIL SL) is a stream of two modules that recognizes the value of ITIL, not just for IT operations, but for all digitally enabled services. Becoming an ITIL Strategic Leader demonstrates that the individual has a clear understanding of how IT influences and directs business strategy.

To obtain the designation ITIL Strategic Leader, the candidate must complete both modules in this stream, with ITIL Strategist – Direct, Plan and Improve being a universal module for both streams.

Both modules have ITIL 4 Foundation as a prerequisite.

The two modules are:

- ITIL Strategist – Direct, Plan and Improve
- ITIL Leader – Digital and IT Strategy.

### 7.3.1 ITIL Strategist – Direct, Plan and Improve

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As detailed in section 7.2.4.

## 7.3.2 ITIL Leader – Digital and IT Strategy

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### 7.3.2.1 Scope

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This module covers:

- alignment of digital business strategy with IT strategy
- how disruption from new technologies is impacting organizations in every industry, and how business leaders are responding
- building and implementing effective IT and digital strategy that can tackle digital disruption and drive success.

### 7.3.2.2 Target audience

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The target audience consists of IT and business leaders and aspiring leaders.

### 7.3.2.3 Training

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Accredited training for this module is mandatory. In addition, those undertaking the ITIL Strategic Leader modules would benefit from a minimum of three years of IT managerial experience.

## 7.4 ITIL Master

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The ITIL Master certification verifies a candidate's ability to apply the principles, methods, and techniques from ITIL in the workplace.

To achieve this certification, a candidate must be able to explain and justify how they have personally selected and applied a range of knowledge, principles, methods, and techniques from the ITIL framework and supporting management techniques, to achieve desired business outcomes in one or more practical assignments.



To be eligible for the ITIL Master certification, a candidate must have both:

- achieved the ITIL v3 Expert certificate or ITIL Managing Professional and ITIL Strategic Leader designations
- worked in IT service management for at least five years in leadership, managerial, or higher management advisory levels.

## 7.4.1 Training

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There is no formal training. PeopleCert, AXELOS's licensed examination institute (EI), provides documentation to support and guide candidates who wish to prepare for the ITIL Master qualification.

## 7.5 ITIL and the T-shaped individual

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The focus of the ITIL 4 advanced-level qualifications has shifted somewhat from previous ITIL v3 education. The deep knowledge of the ITIL processes alone has been enhanced to allow IT service management professionals to gain a wider perspective of their role and its interaction with colleagues elsewhere. These modern IT service management professionals are said to have a T-shaped skillset, as shown in Figure 7.2.

T-shaped skills describe specific attributes of desirable workers. The vertical bar of the 'T' represents expert knowledge and experience in a particular area, such as IT service management. The horizontal bar represents the ability to collaborate with experts in other disciplines, and a willingness to use the knowledge gained from this collaboration.

The T-shaped service manager might look as shown in Figure 7.3.

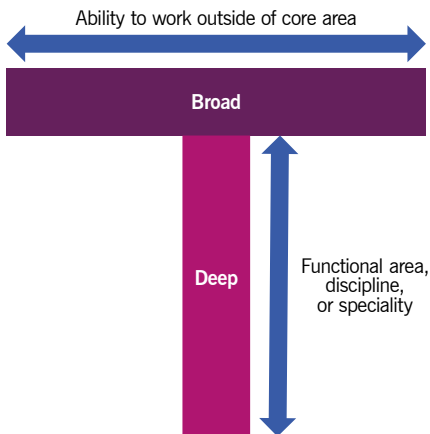


Figure 7.2 A T-shaped skillset

T-shaped skills describe specific attributes of desirable workers. The vertical bar of the 'T' represents expert knowledge and experience in a particular area, such as IT service management. The horizontal bar represents the ability to collaborate with experts in other disciplines, and a willingness to use the knowledge gained from this collaboration.

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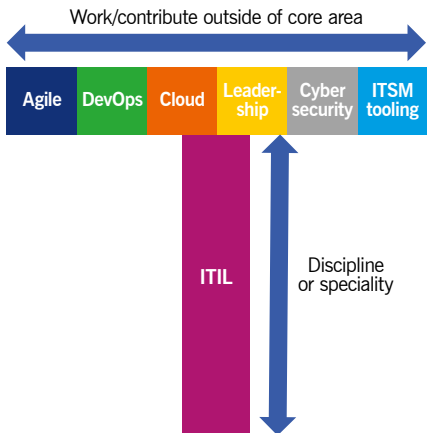


Figure 7.3 A T-shaped service manager

# 8 Related guidance

## 8.1 Best-practice frameworks

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ITIL is part of the AXELOS portfolio of best-practice frameworks designed to help organizations become more effective across a range of key business capabilities, including project, programme, and IT service management.

Other frameworks within this portfolio that can support an organization in the effective delivery of services and products are:

- **RESILIA®** The RESILIA cyber resilience best-practice portfolio provides practical guidance, insight, training, and ongoing learning to help make the right decisions at the right time in the face of ever-evolving and increasing cyber risks.
- **PRINCE2®** The proven methodology of PRINCE2 helps to successfully deliver projects of any size or complexity. Built from a wealth of experience and knowledge, PRINCE2 provides the essentials of project management.
- **PRINCE2 Agile®** PRINCE2 Agile is the world's most complete Agile project management solution, combining the flexibility and responsiveness of Agile with the clearly defined framework of PRINCE2.
- **AgileSHIFT®** AgileSHIFT is an enterprise agility solution created to equip organizations with the knowledge and guidance to understand, engage with, and influence change by embracing Agile and Lean ways of working.

- **Managing Successful Programmes (MSP®)** MSP creates a structured framework for organizations of all sizes and from all sectors, enabling them to improve their programme management practices, offer better services, and prepare for the future more effectively.

For more details about these frameworks, see

<https://www.axelos.com/best-practice-solutions>.

Other frameworks, best practices, standards, and models that can provide additional information include:

- **Agile Manifesto** Four key values and 12 principles to guide an iterative and people-centric approach to software development: <http://www.agilemanifesto.org>
- **COBIT®** 2019 COBIT is a governance and control framework for IT management: <http://www.isaca.org/Cobit/pages/default.aspx>
- **Cynefin** Framework for decision-making: <https://cognitive-edge.com>
- **Lean IT** Extension of lean manufacturing and lean services principles to the development and management of information technology (IT) products and services: <http://leanitassociation.com>
- **IT4IT™ standards** Reference architecture for a flexible, value-stream based approach to managing a digital enterprise: <https://publications.opengroup.org/standards/it4it>
- **The Open Group Architecture Framework (TOGAF®) standards** <https://publications.opengroup.org/standards/togaf>
- **SIAM Body of Knowledge** <https://www.scopism.com/free-downloads/>
- **ISO/IEC 20000 Service Management standard** <https://www.iso.org/standard/70636.html>
- **ISO/IEC 27001 Information Security Management standard** <https://www.iso.org/isoiec-27001-information-security.html>
- **ISO/IEC 14001** Standards related to an environment management system.

## 8.2 Service management standard

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The primary standard for service management is ISO/IEC 20000, which is an internationally recognized standard for service providers who manage and deliver IT services to internal and/or external customers. It specifies the requirements for establishing, implementing, maintaining, and continually improving a service management system (SMS) to support the management of the service lifecycle, including the planning, design, transition, delivery, and improvement of services, which meet agreed requirements and deliver value for customers, users, and the organization delivering the services.

ISO/IEC 20000 is intentionally agnostic, independent of specific guidance, frameworks, or methods. An organization can adopt a combination of generally accepted frameworks in addition to its own experience to meet the requirements of this standard. One of the most common routes for an organization to achieve the requirements of ISO/IEC 20000 is by adopting ITIL best practices.

ISO/IEC 20000 is a multi-part standard. Parts include requirements specification, guidance on application, concepts and vocabulary, and guidance on the relationship between ISO/IEC 20000-1 and ITIL. More details can be found at <https://www.iso.org/standard/70636.html>.

# 9 Summary

Since the original publication of the ITIL framework, many changes have taken place affecting the relationship between those delivering services and the various businesses they support, whether these are internal IT organizations or external service providers. As both business and technology continue to evolve at a rapid pace, it is increasingly important to have good practices in place to enable the definition, design, implementation, operation, and improvement of services, ensuring management controls and governance while maintaining the flexibility needed to meet new and changed requirements.

The ITIL publications represent the learning and experience of many organizations delivering services to customers, and the underpinning theme of continual service improvement enables best practice to evolve and drive quality and efficiency throughout the service management industry.

ITIL is relevant to service providers of all sizes, whether in the public or private sector. It provides a vendor-neutral, non-prescriptive framework that can be adopted and adapted to meet the needs of the organization and its customers. In an industry where sourcing strategies can be varied and complex, ITIL provides a common language and set of processes that enable end-to-end services to be delivered in a consistent and integrated manner.

ITIL is successful because it describes practices that enable organizations to deliver benefits, a return on investment, and sustained success. The benefits of upgrading to ITIL 4 include:

- enabling businesses to compete in the modern world
- achieving improved quality and faster delivery of value for customers

- supporting organizations with digital transformation
- promoting a holistic view of delivering products and services
- making it easy to work with Lean, Agile and DevOps
- flexibility to effectively respond and capitalize on opportunities from technological advances
- retaining all the best things from proven ITIL ways of working, and providing a roadmap that allows organizations to evolve to meet future needs.

Changing business priorities, economic challenges, commercial pressures, and new technologies will continue to shape the market. The guidance provided in the ITIL publications provides a flexible framework of best practice to enhance an organization's capability to deliver maximum value in the fast-paced and ever-changing environment in which we operate today.



# Further information

## Publications

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The ITIL 4 product suite comprises a range of core and complementary guidance to support you on your IT service management journey. It offers essential interactive printed and digital resources to enhance your learning experience and prepare you for the ITIL 4 Foundation, Managing Professional and Strategic Leader exams, as well as providing career-long reference tools beyond certification.

Available titles via the TSO shop include:

- *ITIL® Foundation: ITIL 4 Edition*
- *ITIL®4 Foundation Revision Guide*
- *ITIL®4: Create, Deliver and Support*
- *ITIL®4: Drive Stakeholder Value*
- *ITIL®4: High-velocity IT*
- *ITIL®4: Direct, Plan and Improve*
- *ITIL®4: Digital and IT Strategy*

The official ITIL 4 Foundation app can be downloaded in all app stores and is the ideal learning companion for your exam preparation. To access the official ITIL 4 guidance, visit:

<https://www.tsoshop.co.uk/Business-and-Management/AXELOS-Global-Best-Practice/ITIL-4/>

For volume or trade enquiries, please contact [ibp@wilt.com](mailto:ibp@wilt.com).

## Contact points

### *it*SMF UK

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*it*SMF is the only truly independent and internationally recognized forum for IT service management professionals worldwide. This not-for-profit organization is a prominent player in the ongoing development and promotion of IT service management best practice, standards, and qualifications, and has been since 1991, when the UK chapter commenced as the foundation chapter.

There are more than 50 chapters worldwide. Each chapter is a separate legal entity and is largely autonomous. *it*SMF International provides an overall steering and support function to existing and emerging chapters. It has its own website at [www.itsmfi.org](http://www.itsmfi.org).

The UK chapter has approximately 6000 members. It offers a flourishing annual conference, online bookstore, annual awards, the Professional Service Management Framework (PSMF) competency model, regular member meet-ups, communities of practice, and numerous other benefits. Members of *it*SMF can purchase the ITIL 4 publications at a discount at [tinyurl.com/itsmfital4](http://tinyurl.com/itsmfital4).

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## AXELOS

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AXELOS is a joint venture company co-owned by the UK Government's Cabinet Office and Capita plc. It is responsible for developing, enhancing, and promoting a number of best-practice methodologies used globally by professionals working primarily in project, programme, and portfolio management, IT service management, and cyber resilience. The methodologies, including ITIL, PRINCE2, PRINCE2 Agile, MSP, RESILIA, and its newest addition, AgileSHIFT, are adopted in more than 150 countries to improve employees' skills, knowledge, and competence in order to make both individuals and organizations work more effectively.

Full details on how to contact AXELOS can be found at <https://www.axelos.com>.

For further information on qualifications and training accreditation, please visit <https://www.axelos.com/certifications>.

For all enquiries, please email [ask@axelos.com](mailto:ask@axelos.com).

## TSO

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TSO (The Stationery Office) is the official publisher for AXELOS and is responsible for producing high-quality content in various formats such as hard-copy books, downloadable PDFs, apps, and online subscriptions to support AXELOS best-practice guidance and certifications. These official materials support exam preparation and also offer best-practice reference guides for professionals working in IT service management, project and programme management, and cyber security. As part of Williams Lea, a global leader in marketing and communications services, TSO provides key resources for learning and continual development in service management.

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For more information contact [membership@itsmf.co.uk](mailto:membership@itsmf.co.uk)  
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*its*SMF UK

This pocket guide has been created as an introductory overview for anyone who has an interest in or a need to understand more about ITIL 4 and its qualification scheme. Reviewed and endorsed by itSMF UK, it concisely presents the building blocks of the ITIL 4 framework.

You will be introduced to the concept of service management and to ITIL best practice, including an outline of the four dimensions of service management and the service value chain.

A great place to start on your journey with ITIL 4!

in partnership with  
HM Government



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