PLANVIEW®

ITIL V3 AND THE SERVICE LIFECYCLE

A STRATEGIC APPROACH TO MANAGING IT SERVICES

PLANVIEW INC.

BACKGROUND

IT continually has tremendous demands placed on them to manage new initiatives, projects, incidents, changes, and service requests. At the same time, their people and financial resources are stretched and often reduced. Technology is increasingly complex, businesses must think and operate globally, and there are escalating pressures to conform to government regulations and industry standards. IT organizations must go beyond reacting to the latest crises; they must consider their strategic role in the organization and view IT holistically as a valued business service. How do they do that? By planning services and the strategy behind them, building them, deploying them, operating them, and continually improving them. These make up the steps covered in the ITIL® v3 Service Lifecycle. ITIL offers guidelines on what services to provide and how to manage them, and helps IT organizations efficiently deliver value (services).

Planview offerings include structured business processes that align to a portfolio-driven lifecycle, making it possible for knowledge-driven organizations to drive change and realize higher performance and innovation. These processes are part of a performance management framework that closely aligns with the ITIL framework and lifecycle in flow and functionality.

IT Service Management should be incorporated into an overall business management strategy. Per Forrester Research, "The true business value of IT is in managing the business services." This paper examines ITIL v3, the Service Lifecycle, the benefits ITIL provides, ways to successfully implement ITIL v3, and an integrated IT management framework that includes project management.

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INTRODUCTION

According to Forrester Research, Service Level Management has been focused on IT's view of the world and has had no relevance to the business. The expectations of business users have matured and they now demand consistent service guarantees for key applications and services across the entire enterprise. To do this, business processes must be mapped to IT services and the underlying infrastructure components and IT has to prove its value to the business. The services perspective has now changed, as is seen in Figure 1.

	Typical metrics	Reporting line
Business service management	Time to process completion Processing backlog volume State of business service Business transaction volume	CIO/service owners reporting to LOB executives
IT service management	Service availability Incident closure rate Frequency of changes	CIO reporting to CFO
Infrastructure management	Server availability CPU utilization Disk space	IT operations reporting to CIO

Figure 1. Upward Progression—from Focus on Infrastructure Management to Business Service Management—of Services Perspective

There are several frameworks available today to help IT with service management, application development, and project and program management. These include Control Objectives for Information and Related Technology (CobiT™), Capability Maturity Model® Integration (CMMI®), PMBoK® (Project Management Body of Knowledge), and ITIL (Information Technology Infrastructure Library).

ITIL has relationships to projects and ties in with portfolio management, which is broadening its perspective to include services. Per Forrester Research, ITIL now has a "Business Service Management flavor." In a September 27, 2004 article, *Network World* called Business Service Management (BSM) "IT's higher calling." The elevation of IT functions to strategic business services increases the value that IT delivers to an organization. Because of all this, ITIL is taking on a bigger presence and influencing other frameworks, all of which can work together to enable the end-to-end management of the IT organization.

ITIL BACKGROUND

With Systems Management concepts from IBM, the United Kingdom Government's Central Computer and Telecommunications Agency (CCTA) project—now the Office of Government Commerce (OGC), an Office of the UK's Treasury—was given the mission in the 1980s to develop a framework for efficient and financially responsible use of IT resources within the British government and the private sector. ITIL was developed, but was not widely adopted until the mid-1990s as an international standard for IT Service Management. ITIL is supported by an international user group called the IT Service Management Forum International (itSMFI).

ITIL began as a collection of books, or volumes. Each book covers specific practices for IT Service Management

and groups related process guidelines into the different aspects of IT management, applications, and services. ITIL v1 had 34 volumes, ITIL v2 had 9, and ITIL v3—published in June, 2007—has 5 core volumes. The evolution of ITIL has been to make it more accessible, more affordable, more relevant, and to provide increasingly common language for talking about IT services.

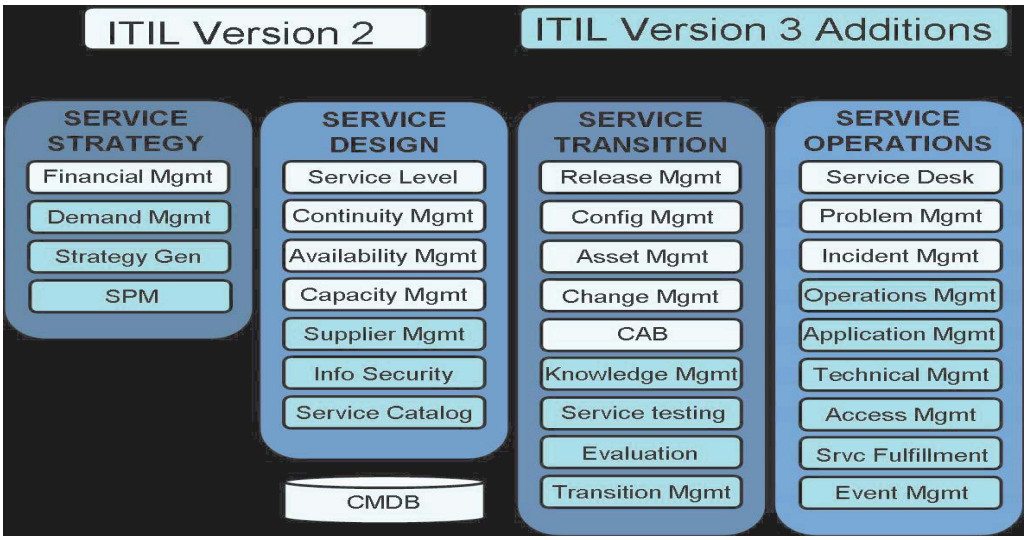


Figure 2. ITIL v2 and ITIL v3 Additions

Version 2, represented in the white boxes in Figure 2, took a process-centric view, focused on getting services in place faster or doing work-arounds, but did not describe the design, strategy behind, or continual improvement of services and the Service Lifecycle. Version 3, shown in the light blue boxes in Figure 2, is evolutionary. It fills those gaps and adds focus on ensuring that the right services are being offered. Its guidance aligns to the full lifecycle of a service and creating a framework that helps to manage services at various life stages.

Pink Elephant, a leader in IT management best practices, and BMC recently surveyed IT executives, directors, managers, and consultants from the Americas, Europe, Middle East, Africa, and Asia Pacific. They found that among IT strategies being implemented, 71% are implementing ITIL. U.S. membership in the IT Service Management Forum nearly tripled in the past three years. Forrester Research says that ”80% of the billion-dollar companies will apply ITIL in 2008.” Although there is considerable overhead with implementing ITIL, Peter O’Neill, Principal Analyst with Forrester Research, says there is not a company too small to need ITIL.

Let’s examine why there is such a growing interest in ITIL and look specifically at the framework and Service Lifecycle of ITIL v3.

ITIL V3 FRAMEWORK

The ITIL v3 framework has the following structure, which is depicted in Figure 3.

- **Five core books**, which reflect the life stages of IT services and emphasize creating business value rather than just executing processes. The five core volumes are Service Strategy, Service Design, Service Transition, Service Operation, and Continual Service Improvement.
- **Complementary Publications**, which include specific content that targets particular situations, industries, and environments and helps with customizing ITIL to suit your specific requirements.
- **Web Support Services**, which provide online ITIL resources such as a glossary, papers, templates, business cases, process maps, and more.

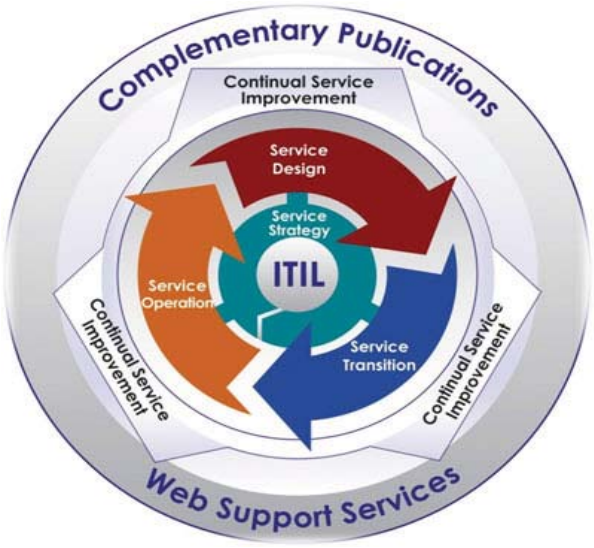


Figure 3. ITIL Service Lifecycle

Let's discuss each of the core volumes in further detail.

SERVICE STRATEGY

The Service Strategy book is a major new addition and strength in the ITIL v3 library. It focuses on building a sound service strategy based on services that deliver real value to internal and external customers. This volume introduces the Service Lifecycle. It considers the overall business goals of the organization and gives guidance on strategic analysis, planning, positioning, and implementation for service management capabilities.

SERVICE STRATEGY

The identification of market opportunities for which services could be developed in order to meet a requirement on the part of internal or external customers. The output is a strategy for the design, implementation, maintenance, and continual improvement of the service as an organizational capability and a strategic asset.

KEY AREAS

Strategy Generation, Service Portfolio Management, IT Financial Management, Return on Investment, and Demand Management

TARGET AUDIENCE

CIO, VP of Strategy, Strategic Steering Committee, Corporate Finance, and Executive Leadership Team

INFLUENCERS

Service Managers, Resource Managers, and Operations Managers

SERVICE DESIGN

The Service Strategy is used to create an effective Service Design with quality services that meet or exceed customer expectations. This book includes guidelines for creating specifications for execution through service transition and operations.

SERVICE DESIGN

The activities that take place in order to develop the strategy into a design document that addresses all aspects of the proposed service and the processes intended to support it.

KEY AREAS

Availability Management, Capacity Management, Continuity Management, Security Management, Supplier Management, Service Catalog Management, Service Level Management, and Application Management

TARGET AUDIENCE

Service Managers, Resource Managers, and Service Providers

INFLUENCERS

VP of Strategy, Service Managers, Operations Managers, Program and Project Managers

SERVICE TRANSITION

The Service Transition Book focuses on implementation. It offers guidance to ensure that the Service Design delivers the intended strategy and that it can be delivered and maintained cost-effectively, with speed, and with minimum disruption to operations. Service Transition helps organizations transition new or changed services into operations and allow for innovation.

SERVICE TRANSITION

The implementation of the output of the service design activities and the creation of a production service or modification of an existing service.

KEY AREAS

Change Management, Release Management, Configuration Management, Asset Management, CAB, and Service Knowledge Management

TARGET AUDIENCE

IT Service Managers, Service Owners, and Operational Staff

INFLUENCERS

Customers, Service Owners, and Support Staff

SERVICE OPERATION

Service Operation focuses on effectively managing services that are in production on a day-to-day basis. This book includes delivery and control activities that help deliver high-quality services based on customers' Service Level Agreements (SLAs).

SERVICE OPERATION

The activities required to operate the services and maintain their functionality as defined in Service Level Agreements with the customers.

KEY AREAS

Incident Management, Problem Management, Event Management, Access Management, and Service Fulfillment

TARGET AUDIENCE

Service Owners, Operational Staff, Vendors, and Service Providers

INFLUENCERS

Customers, End Users, Account Managers, Sales Managers, and IT Managers

CONTINUAL SERVICE IMPROVEMENT

Continual Service Improvement provides guidance to organizations around improvement to the quality of services that are delivered. This book provides focus to process elements that help identify and introduce a cycle of service management improvements. It also gives structure to assessing and measuring services so that service can be continually improved in order to give maximum benefit to customers.

CONTINUAL SERVICE IMPROVEMENT

The ability to deliver continual improvement to the quality of the services that the IT organization delivers to the business.

KEY AREAS

Service Reporting, Service Measurement, and Service Level Management

TARGET AUDIENCE

Service Planners, Service Designers, Business and IT Leaders, IT Service Managers, Service Owners, and Operational Staff

INFLUENCERS

Business Leaders, IT Leaders, Customers, Service Owners, Quality and Conformance Managers

BEGINNING TO IMPLEMENT ITIL

Perhaps your CIO has mandated the use of ITIL Maybe you are an IT Service Provider and your customers need to demonstrate Sarbanes-Oxley compliance, which ITIL can ensure by documenting changes, etc. So how do you begin with ITIL?

It is not advisable to try and implement all of ITIL at once; in fact, most companies just use the parts they want to use. You don't have to start with Service Strategy. Start small and add on what you need. Begin by looking at where your biggest pain is and then demonstrate an important early success. Pink Elephant and BMC found in their previously cited survey that the most common ITIL process implemented first is Incident Management, followed by Service Desk and Change Management. Internal and external customers interact daily at these levels and these processes have a lot of visibility within the business.

In the Pink Elephant/ BMC Survey, respondents said that the biggest challenges to ITIL implementation are cultural. Forrester Research says that it is essential to include business people in the project team and start from the top-down. By having top management's buy-in, the whole business has a mandate to adopt ITIL and to put in place the necessary organizational changes to be successful.

Pink Elephant suggests that you begin by providing ITIL education for your employees. Those people then become involved in the planning and strategy development. Next there is process design and implementation, followed by tool selection and implementation.

So what are the benefits of implementing ITIL? Let's take a look.

ITIL V3 SERVICE LIFECYCLE BENEFITS

There are many benefits to using ITIL v3. The respondents in the Pink Elephant/BMC survey said that the primary benefits from ITIL implementations are process standardization and efficiency. With the introduction of the service lifecycle in v3, business value-based reports and metrics are a big part of ITIL because of the addition of Continual Service Improvement (CSI). With CSI, you gather, measure, process, analyze, evaluate, report, and improve. You get a clear picture of the Return on Investment (ROI) you made in ITIL.

In ITIL v3 you also get a complete picture of ITIL operations because you can see all projects, assets, capacity, and costs across the service portfolio. With this complete picture and increased visibility, the CIO has more leverage to get the resources needed to do the work requested and to shelf less important (to the business) projects. Service is viewed as a business and considers demand/resource planning and financial management.

All stakeholders become participants in deciding the priorities of services and no longer have the ability to undermine the success of IT with emergency requests without understanding that there will be associated costs and trade-offs to the business. This ensures that internal and external customers with the highest priority needs get services first and there is improved use of IT investments.

IT can expect to experience an improved reputation within the organization due to ITIL-enabled improvements in financial management and the use of IT resources and infrastructure. ITIL inherently has other benefits, which include a long-needed common dictionary, accessibility, ready training, and a comprehensive methodology and guides. As brilliant as ITIL v3 is, though, it is missing an essential piece that is needed in the Service Lifecycle.

COMPLETING THE ITIL V3 SERVICE LIFECYCLE

With the addition of Demand Management to ITIL v3, an organization is not just looking at what Capacity is available, but also what capacity is required. This allows managers to do better strategic planning and design of services. The thing that is missing in the ITIL v3 framework is Service Development—or Product, Portfolio, and Program Management. Figure 4 shows the addition of Project Management—inside the red circle and provided by Planview Enterprise— to create a new framework, which completes and supports the Service Lifecycle.

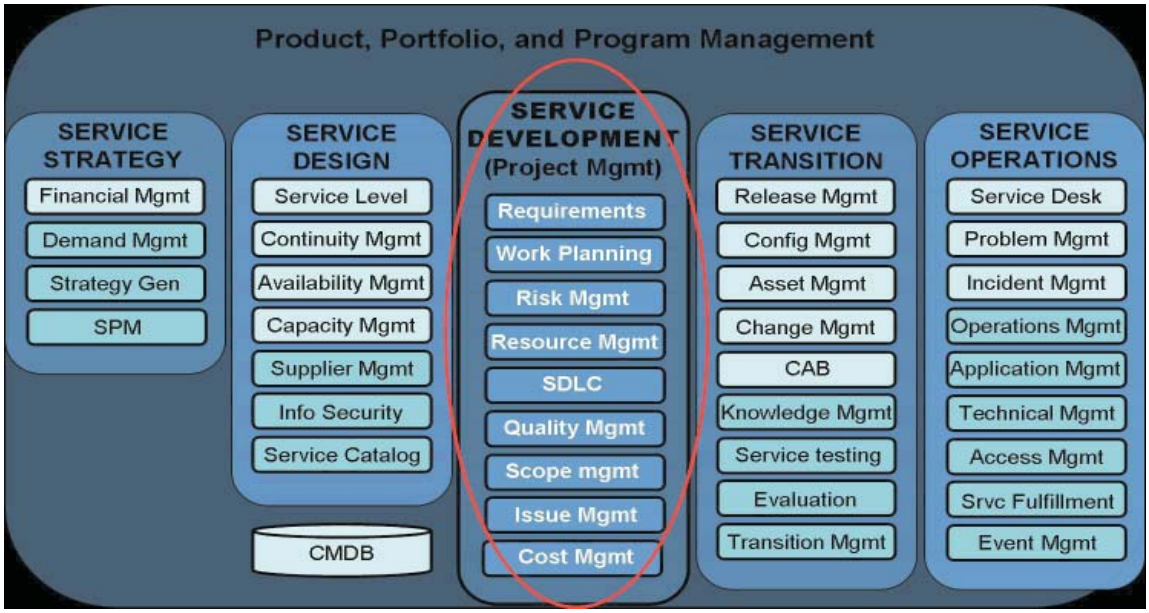


Figure 4. Completing and Supporting the ITIL v3 Service Lifecycle with the Addition of Project Management from Planview Enterprise to Create a Next Step in the Evolution of ITIL

With the addition of Project Management to the ITIL v3 Service Lifecycle, Portfolio Management functionality can be applied. Planview PRISMS® defines the following IT demand categories: strategic projects, major projects, other planned work (takes two days to two weeks to execute), service work (discrete services charged back to customer groups), and ongoing work (shared services or overhead work). Figure 5 shows how business demand can be funneled into strategic demand, tactical demand, and operational demand.

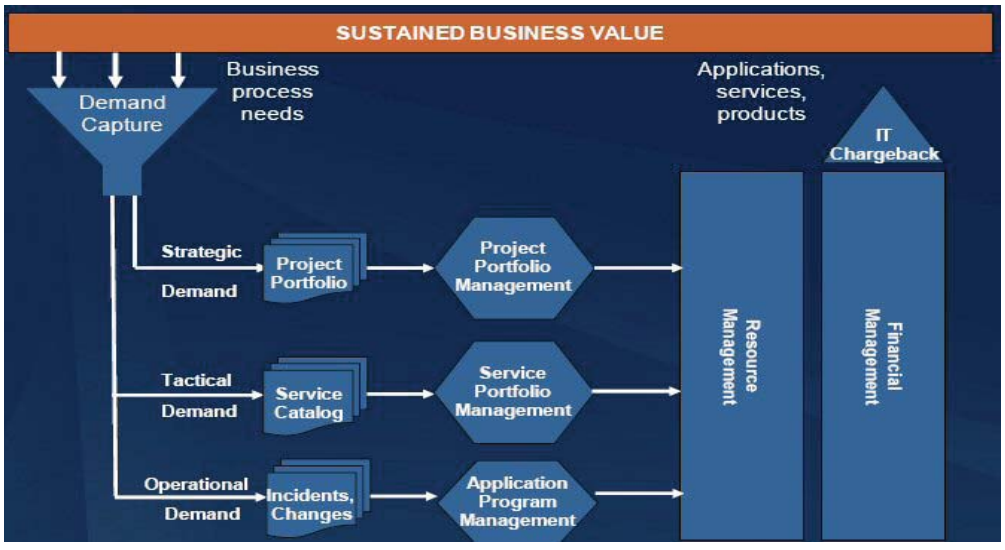


Figure 5. Demand Management—Strategic, Tactical, and Operational

IT Service Management may already be using Service Portfolio Management—described in Figure 6 and added to ITIL v3—which offers concise, integrated offerings, active client management, transparent operations, and cost-effective delivery. This does not give IT managers the complete capability they need to manage demand.

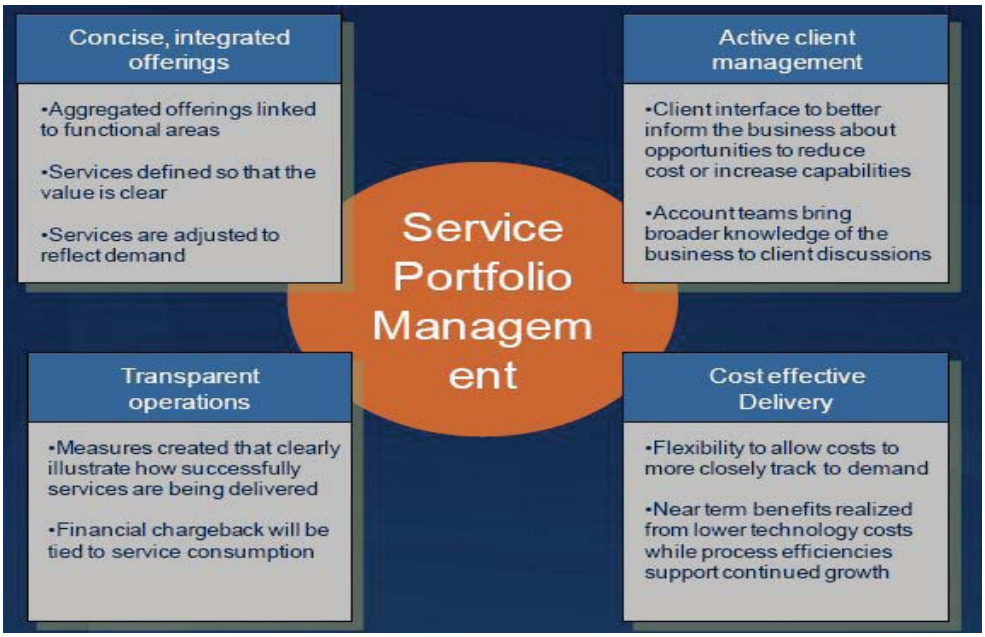


Figure 6. Service Portfolio Management

IT needs extended Portfolio Management systems that can aggregate demand, as is shown in Figure 7 below, through a merger of Project Portfolio Management (PPM), Business Process Management (BPM), and Business Service Management (BSM).

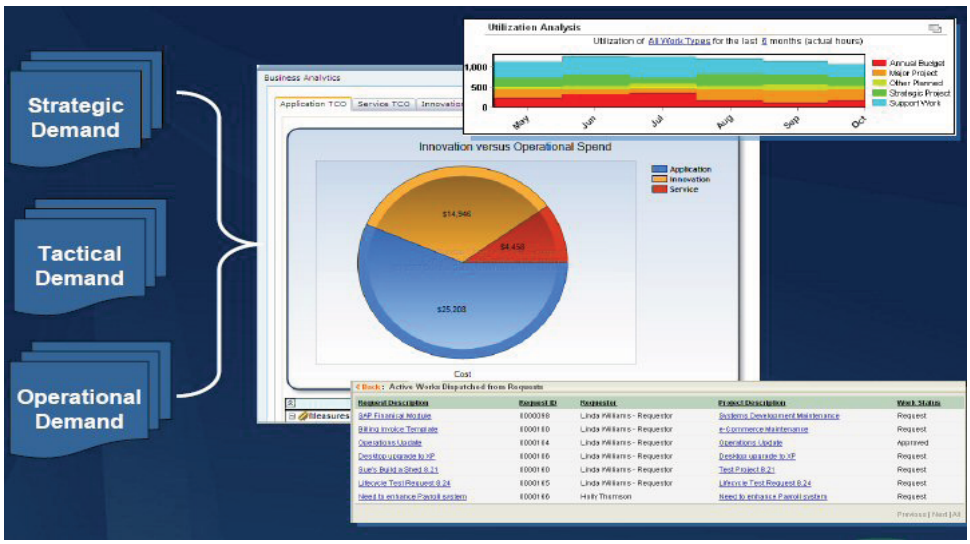


Figure 7. IT Demand Aggregation

Peter O'Neill of Forrester Research believes that a new front office is needed for IT-business relations and that it will be responsible for interacting with the business to:

- Understand demand for new projects and service requests
- Translate business needs into the portfolio of IT services
- Manage the service levels and budgets for those services

He says that the back office will be responsible for the day-to-day operations of the IT infrastructure.

So how do you integrate different IT management disciplines, approaches, and methodologies (including ITIL) and handle IT demand strategically so that it feeds the needs of the business, and stay within budget and SLA restrictions? An integrated business process framework that serves the IT front and back offices is needed.

SUMMARY

Building a common operating framework requires consensus, which is only possible through a common approach that brings together strategic, financial, product, services, operational, customer, and technical perceptions. Forrester Research says the expected business process benefits of doing this are:

- Predictability of IT results, which means better control of changes, better control of deployment, and better control of capacity requirements
- IT cost reduction through reduction of unplanned, unscheduled work resulting from incidents and problems and faster resolution of incidents and problems
- Better resource allocation due to fewer resources being allocated to maintenance and support and more agility and responsiveness to business needs

ITIL is emerging as the preferred approach to IT Service Management. Earlier ITIL versions focused on optimizing ITSM processes and functions. Version 3 adds focus on achieving desired customer outcomes and is more strategic in its approach. As organizations grow in maturity, they will begin to utilize more and more ITIL v3 processes.

An IT organization can not use just one methodology, though, any more than they can use just one tool. Today, the IT ecosystem is made of many tools—service desk, configuration management, provisioning, event, identity, storage, and more. ITIL is not performed by one application, but by many methodologies such as PMI®/Project Management, CMMi, COBIT, Six Sigma, and Planview solutions.

ITIL v3 is a significant step forward, but is still primarily a CIO-down perspective. It still relies upon related disciplines and processes such as program and project management, financial management, resource management, and strategic planning. To survive and thrive today, IT organizations must integrate different IT management disciplines, approaches, and methodologies and this requires an operational framework. This framework establishes a roadmap for the alignment of processes, terminology, and work management approaches and handles the end-to-end lifecycle of IT services.

INTEGRATED IT MANAGEMENT FRAMEWORK WITH PLANVIEW

Planview provides an integrated and comprehensive Business Management Framework through Planview solutions and those of Planview partners. This framework, which is depicted in Figure 8, puts the demands from initiatives, projects, services, and incidents through the rigors of strategic planning, capacity management, funding and budgeting, work and resource management, cost management, and benefit realization to produce maximum results for the business.

Figure 8. Planview Business Management Framework

Figure 9 depicts what this framework looks like at the detail level. Planview PRISMS enables you to build process maturity efficiently through adaptive management best practices, which help to improve business processes and maximize the ROI on your Planview and IT investments.

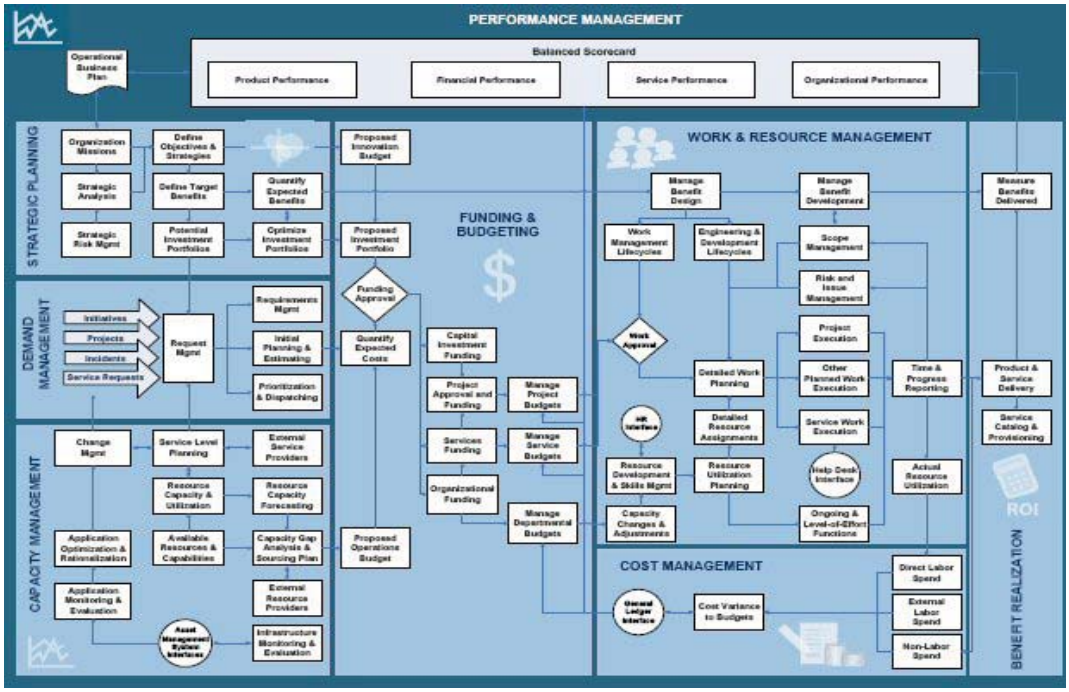


Figure 9. Planview PRISMS Integrated Business Process Framework

Per Peter O'Neill of Forrester Research, not many companies can address the big picture, as is shown in Figure 9. Planview is able to do this because they bring together several pieces in an integrated framework to give IT managers the end-to-end Service Management functionality they need. How does Planview do this and how does this relate to ITIL v3?

Planview Enterprise® is a comprehensive decision-making platform that drives performance by delivering unprecedented transparency into the trade-offs involved in key business decisions across the enterprise. Planview Enterprise enables the successful balancing of goals and risks with money and resources to make better decisions around strategies, projects, and services, and applications. Planview Enterprise combines comprehensive demand management with real-time portfolio analytics, best-of-breed resource management, and action-driven processes.

Working together, these capabilities give customers improved visibility, fewer redundancies, increased efficiency, and the ability to focus limited resources on higher-value work. By integrating analytics with root-cause analysis, Planview Enterprise enables true optimization, yielding even greater efficiency and productivity.

The result is a powerful, proven-effective way to fully align strategies, resource capacities, and funding; gain better control of projects and resource assignments; capture and manage the total cost of delivering services to the business; and deliver effective governance.

Planview Enterprise adds rigor to the strategic management process, delivering the visibility needed to align strategies with resource capacities and funding across the organization. Planview Enterprise makes it possible to dynamically manage money and resources to support high value initiatives and make better decisions around investments, synchronizing top-down strategic planning with bottom-up execution, and integrating decision making with a cohesive business strategy. It makes it possible to analyze and manage risks, prioritize strategies, and use scenario planning to prepare for economic and business uncertainty.

Planview also delivers unprecedented levels of transparency into services, assets, and applications, enabling improved decision making and reduced maintenance costs. With this information, one can determine the value of services, identify and eliminate inefficiencies, accurately invoice business units, and gain control of IT spending. It also facilitates uncovering hidden value in an IT department by reducing maintenance costs and delivering business services more efficiently.

Utilizing a lifecycle approach driven by Planview PRISMS® best practices provides tools to help identify and eliminate low-value applications to dramatically reduce IT spending, simplify application infrastructure, and support enterprise architecture compliance.

By embracing ITIL standards, Planview facilitates the development of consistent processes for delivering business services. Service catalogs, service demand management tools, and automated workflows streamline the request and delivery of business services, improving productivity, reducing workload, and eliminating service bottlenecks.

Using Planview's open platform allows one to model and deploy a complete range of business processes, from unique, custom-designed processes to those that enable industry-leading standards such as Planview PRISMS®, ITIL, PMBoK, and others. Because it is part of the Planview Enterprise product suite, with a single click, one can quickly go from an intuitive, process-based graphical view of operations to strategic planning, project

portfolio management, and service portfolio management. Business processes with Planview Enterprise address four primary factors of process excellence to help achieve process leadership to drive change: process design, automation, adoption, and measurement.

With Planview Enterprise, the aim is to always improve performance and capabilities through partnerships with leading providers of collaborative content management and service software products. As a result, Planview offers best-of-breed add-on options that can be easily integrated with Planview Enterprise for a seamless solution. Planview OpenSuite offerings that are compatible with ITIL are:

- **Planview OpenSuite for Service Desks** allows seamless integration of Planview Enterprise with third-party service desk applications for an efficient, ITIL-compatible approach to service desk tickets.
- **Planview OpenSuite for BMC Remedy Change Management** facilitates seamless integration of Planview Enterprise with third-party change management applications for an efficient, ITIL-compatible approach to managing change requests.
- **Planview OpenSuite for BMC Atrium** and **Planview OpenSuite for CMDBf** allow IT organizations to integrate the emerging system of record for the IT infrastructure with Planview Enterprise, the system of record for work and resource management, to enable a TCO-centric view into the services and applications portfolios.

If you currently are using Planview Enterprise and want to get started with ITIL, take a proactive approach to ITIL initiatives. Get together with your IT Operations Manager and ask if they are looking at IT Service Management and ITIL. Consider process, terminology, and work management impacts to your current Project Portfolio Management and Enterprise Portfolio Management deployments, and the opportunity to consolidate and integrate Service Portfolio Management elements within your existing application sets.

By rolling up the Planview Business Management Framework depicted in Figure 7 to show its true closed loop nature, you can see its high-level stages in the Innovation Lifecycle pictured in Figure 10. Change drivers impact strategies. Knowledge-driven industries have to determine how to optimally commit money and people to deliver real value. They complete the cycle by executing on these decisions and realizing higher levels of performance and innovation. For IT Service Management, this is made possible through Planview Enterprise solutions and guidelines from the ITIL v3 Service Lifecycle, pictured in Figure 11.

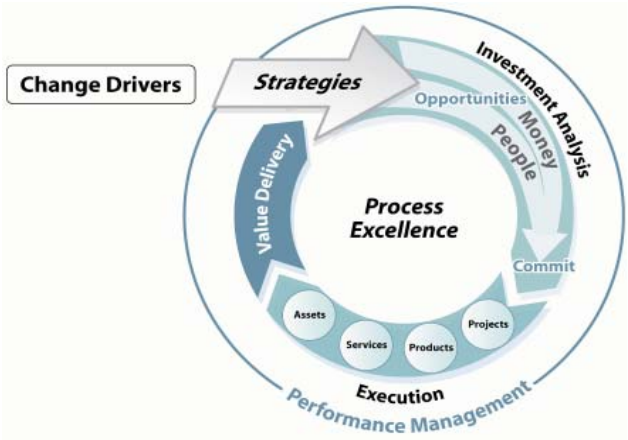


Figure 10. Planview Innovation Lifecycle

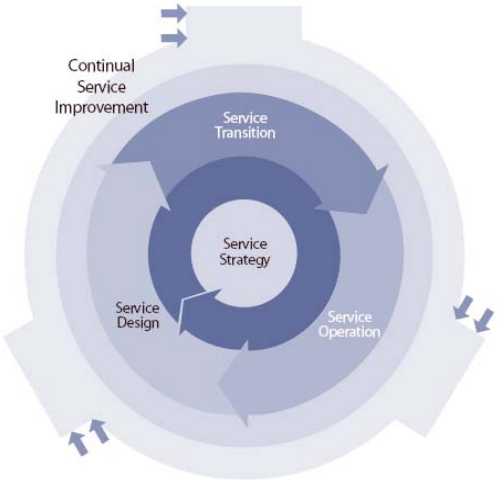


Figure 11. ITIL v3 Service Lifecycle

CASE EXAMPLE 1

Planview OpenSuite for BMC Remedy Service Desk works with BMC Remedy Help Desk 5.6, BMC Remedy Service Desk 7.0, or later versions of either product. Specifically, the integration is to the Incident Ticket. The Service Desk and Help Desk products are capable of creating Incident and Problem tickets, each with tasks of their own. This integration, depicted in Figure 12, is to allow the 5-10% of incidents that are bigger to be managed in Planview Enterprise as a project or part of a project. These larger incidents are things like requests for services—such as move ten people—or incidents that in themselves are large—such as report of water in the datacenter.

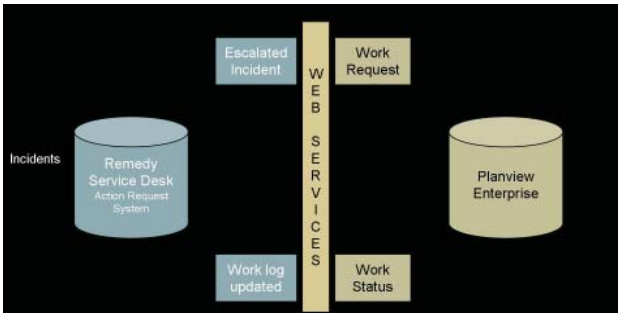


Figure 12. Information Flow between BMC Remedy Service Desk and Planview Enterprise

With the integration in place, from within an Incident Ticket the user can place a check mark in the 'Send to Planview' check box to create a Planview Work Request, which is populated with information from the Incident Ticket. The Planview Work Request is then worked in Planview; it is associated with an existing project, or is turned into a project. Each time certain information is changed in the Work Request, the changes to attributes that came from BMC Remedy—like Request Name, Work Request Type, Line of Business, Description of Issue, Requested Start Date or Requested End Date—are sent to the Incident Ticket. The information shows up in the Work Log and does not overwrite the original information in the Remedy Incident Ticket. The information is sent back into the original Incident Ticket so the Tier 1-3 service desk person can check status and set expectations with the requester. When the project is closed (complete), the final status is sent to the Remedy Incident Ticket and the Tier 1-3 tech closes the ticket. If any tasks were created in the Remedy Incident Ticket, they are not reflected in the Planview Work Request.

This integration is not for the 90 to 95% of Incident Tickets that are break fix—like "my screen is blue." In cases like that, the Tier 1 fixes the issue, closes out the ticket, and reports their time into Planview at the end of each week. All time comes into Planview against some service. Here's a real-life example that uses the integration.

STORY Department Manager Bob submits a ticket to move 10 employees to the new building. This is an Incident Ticket, but is often referred to as a Service Desk ticket. Tier 1 Service Desk Tech Betty receives the ticket and sees that she can't solve it right away. Her job is break fix—to get people up and running as quickly as possible with a fix or work-around. She looks in her knowledge base, and based on certain criteria, she saves the Incident Ticket with the "Send to Planview" box checked. Now a Planview Work Request is created. Project Manager Paul now sees the Work Request show up on his radar. He looks at the information and attaches the request to an existing project that fits the criteria. The move will occur in the proper time period. He creates tasks or activities within the project to do this work.

As Paul updates the work request, Betty sees the updated information in her Remedy Incident Ticket. When Bob emails her for a status check, Betty knows what to tell him. It is on schedule to be completed by the requested time. Finally, the project is complete, and Paul changes the status to Complete. Betty also sees this information in the Remedy Incident Ticket. She then closes the Remedy Incident Ticket and Bob is automatically notified that the work is done. If Paul had needed some changes to the IT infrastructure—like a new server installed—he could have created a Change Request right in his project. The Change Request would have gone to the Change Manager, who would have added tasks and managed the resources and schedules in the project.

CASE EXAMPLE 2

Planview OpenSuite for BMC Remedy Change Management works with BMC Remedy Change Management 7.1 or later. BMC Remedy Change Management creates and allows management of BMC Remedy Change Requests. This integration allows BMC Remedy Change Requests and their tasks to be moved into Planview Enterprise. When saving a BMC Remedy Change Request, the user can opt to save it in Planview Enterprise. You can choose an existing project or create a new project to place the BMC Remedy Change Request and its tasks into; multiple Change Requests can be saved into the same project. The Change Request and its tasks are saved to the leaf level of the project—each is an activity—where resources/schedules can be assigned.

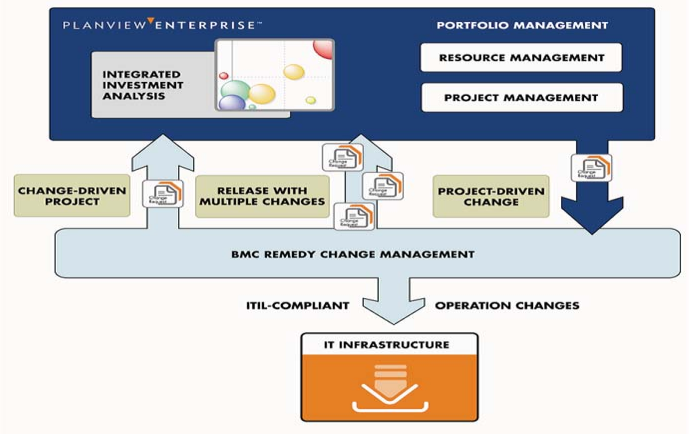


Figure 13. BMC Remedy Change Management Integration with Planview Enterprise

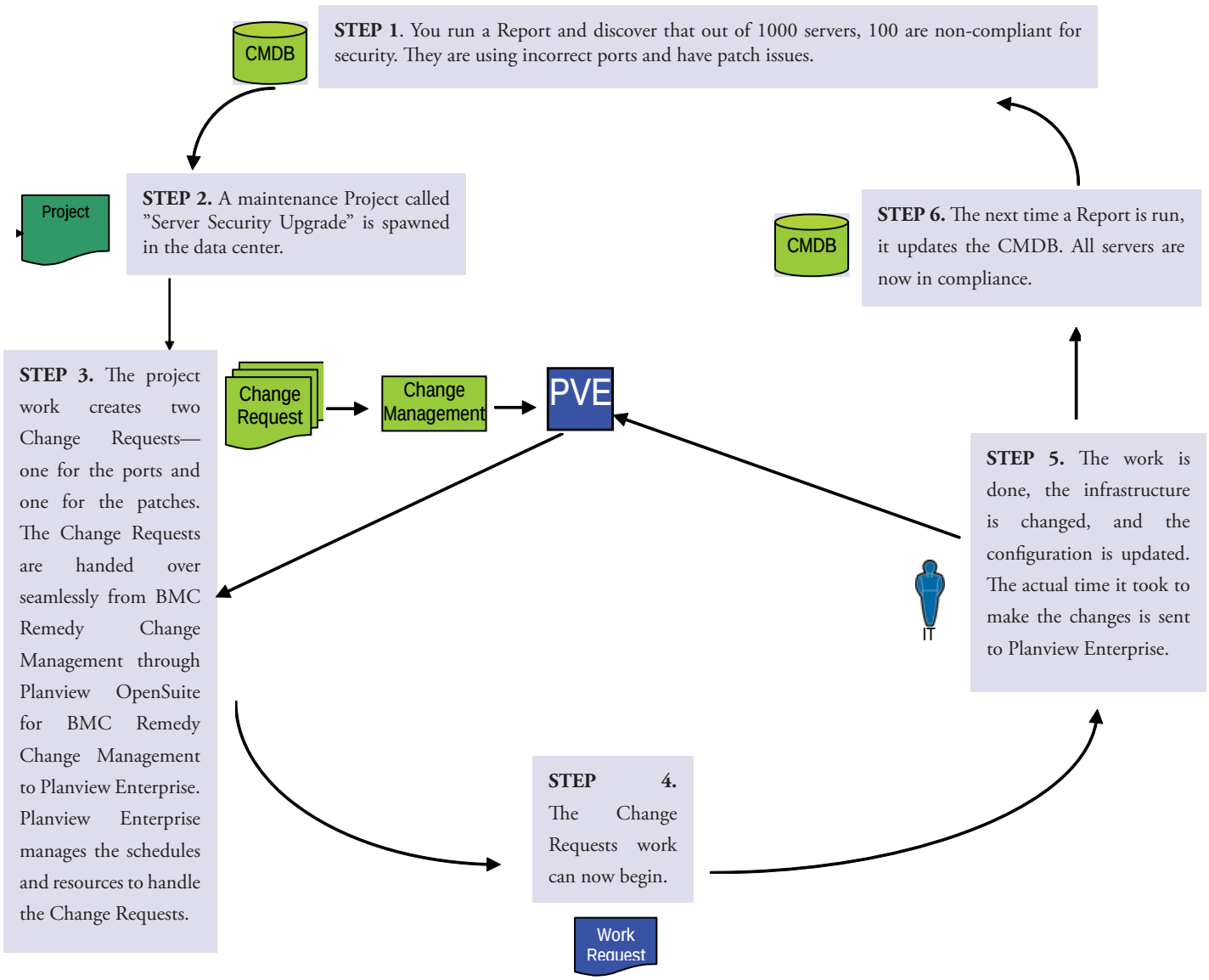
This integration also allows Change Requests to be created from Planview Enterprise projects. From within Planview Enterprise, the user can choose to create a BMC Remedy Change Request and it will be created. Information is updated bidirectionally. Time submitted in the BMC Remedy Change Request is entered into the Planview Enterprise project time sheet for that user. Resources and schedules are managed in Planview Enterprise and once saved, are moved back into the BMC Remedy Change Request.

STORY Change Manager Charlie creates BMC Remedy Change Requests and accepts BMC Remedy Change Requests created by others. His job is to schedule the tasks and assign resources. He adds all the information into the tasks that is necessary such as dependencies, descriptions (where they are not defaulted in), and sets start/end dates. Charlie then saves the BMC Remedy Change Request to Planview Enterprise, picking or creating the project that it will be in. He clicks the 'View in Planview' button that now appears at the bottom of the BMC Remedy Change Request. The Planview Manager window is opened and the BMC Remedy Change Request information is there. He can then use Planview Enterprise functionality to assign resources and tighten the schedule. When he saves the Planview work, the information is updated in the BMC Remedy Change Request. He could have changed resources for tasks and times.

He then goes back into the BMC Remedy Change Request and changes the status to Start. BMC Remedy Change Manager workflow kicks off and assignments are sent. The change implementers that are assigned the tasks now do their work. They log into BMC Remedy Change Manager, get their work, do it, and when done, type in their time, and close the ticket. Their time is now entered into a Planview Enterprise timesheet for that project. They are done and they move onto their next task.

PMO Paul can now look at the projects and align the projects along side the innovation projects. Charlie can go into the project and determine exactly how much the BMC Remedy Change Request(s) costs. Department Manager Bob can now look in Planview Enterprise and determine the costs of innovation and operations for services.

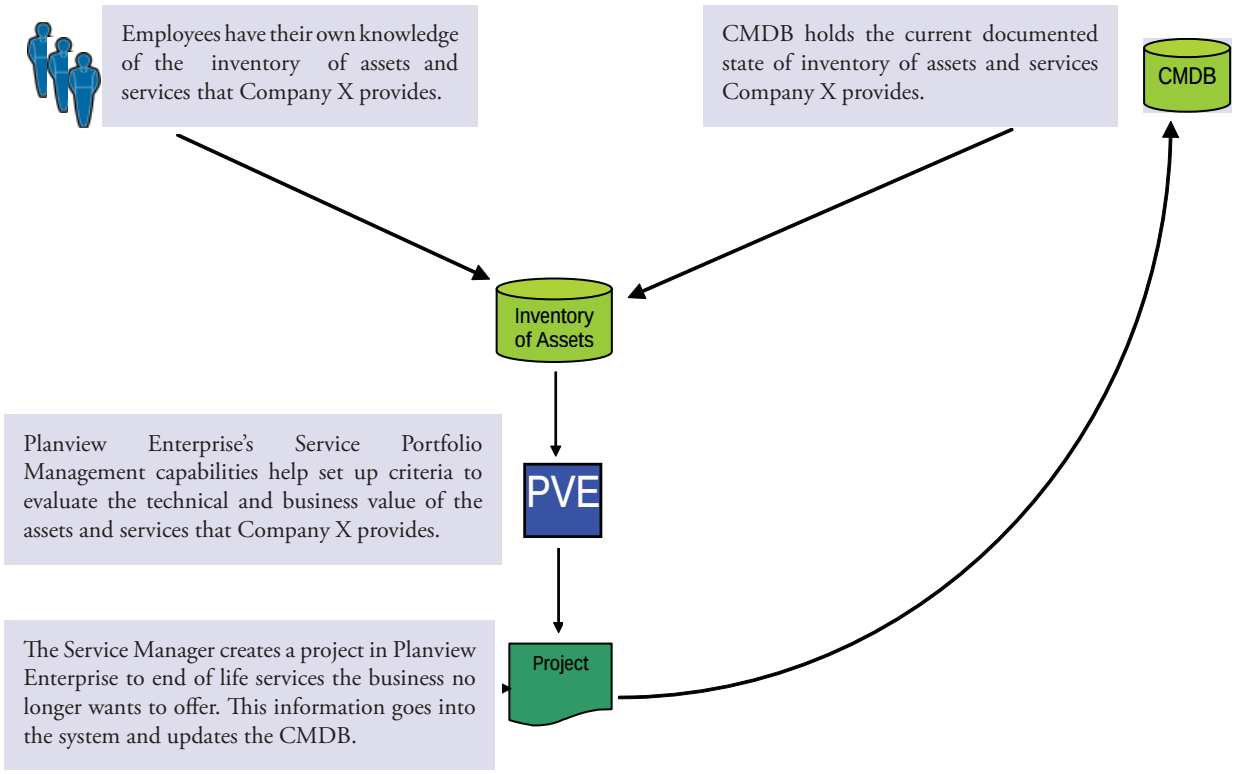
CASE EXAMPLE 3



In the above example, when a routine CMDB report is run, it is discovered that 100 of the servers are not configured properly and need to be upgraded. The Change Request first comes into BMC Remedy Change Management and is sent seamlessly through Planview OpenSuite for BMC Remedy Change Management to Planview Enterprise. There it is updated with schedule and resource information and sent back to BMC Remedy Change Management. When the work is done, the time it took to do it is sent to Planview Enterprise and the CMDB is updated. All servers are now in compliance.

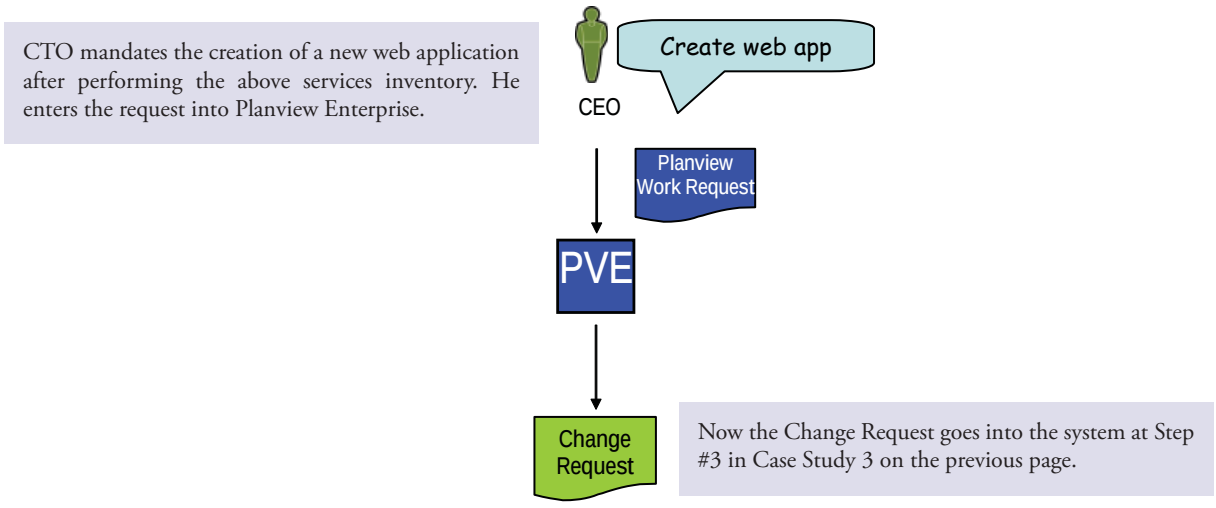
With the addition that Planview makes of project management to ITIL practices, managers can find out from Planview Enterprise how many hours it took to upgrade the servers and what the cost was. This is a demonstration of a complete Service Lifecycle approach to managing IT services.

CASE EXAMPLE 4



The above example demonstrates the power of integration that allows Service Managers to keep track of the assets and services the organization provides. Planview Enterprise includes an ITIL-recommended Service Portfolio Management capability that allows managers to effortlessly manage projects and get the information they need to do their jobs within one environment.

After doing an inventory of services in the above example, the CTO decides that a new web application needs to be added. He has the option of entering this request directly into Planview Enterprise as a Work Request (as seen below) or he can enter a Service Request into BMC Remedy Change Management. The example below follows the request after it is entered into Planview Enterprise. It connects into Step 3 in Case Example 3 on the previous page. ITIL requires that for every change to a Configuration Item (CI), there must be a Change Request. Using Planview Enterprise enables an organization to be ITIL-compliant.



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WEB PAGES

Office of Government Computing ITIL web pages – http://www.ogc.gov.uk/guidance_itil.asp

Wikipedia page on ITIL – http://en.wikipedia.org/wiki/Information_Technology_Infrastructure_Library

Since 1989, Planview® has been a market leader and trusted partner in providing comprehensive portfolio management solutions. Planview Enterprise®, the company’s leading performance management platform, combines project and portfolio management software with adaptive best practices, Planview PRISMS®, to enable better decision making and business accountability. Industry leaders such as Citi, BP, EDF, and the American Red Cross, partner with Planview to achieve their strategic business goals. Headquartered in Austin, Texas, with offices across the U.S., Europe, and Asia-Pacific, Planview supports 550 customers in virtually every industry. Planview is privately held and has been profitable for over a decade. For more information, visit www.planview.com.

GLOSSARY

Business Service An IT Service that directly supports a Business Process, as opposed to an Infrastructure Service which is used internally by the IT Service Provider and is not usually visible to the Business. The term Business Service is also used to mean a Service that is delivered to Business Customers by Business Units. For example delivery of financial services to Customers of a bank, or goods to the Customers of a retail store. Successful delivery of Business Services often depends on one or more IT Services.

Business Service Management (BSM) (Service Strategy) (Service Design) An approach to the management of IT Services that considers the Business Processes supported and the Business value provided. This term also means the management of Business Services delivered to Business Customers.

Capability Maturity Model® Integration (CMMI) (Continual Service Improvement) CMMI is a process improvement approach developed by the Software Engineering Institute (SEI) of Carnegie Melon University. CMMI provides organizations with the essential elements of effective processes. It can be used to guide process improvement across a project, a division, or an entire organization. CMMI helps integrate traditionally separate organizational functions, set process improvement goals and priorities, provide guidance for quality processes, and provide a point of reference for appraising current processes. See http://www.sei.cmu.edu/cmmi/ for more information.

Change Advisory Board (CAB) (Service Transition) A group of people that advises the Change Manager in the Assessment, prioritization and scheduling of Changes. This board is usually made up of representatives from all areas within the IT Service Provider, the Business, and Third Parties such as Suppliers.

COBIT (Control Objectives for Information and related Technology) (Continual Service Improvement) COBIT provides guidance and Best Practice for the management of IT Processes. COBIT is published by the IT Governance Institute. See http://www.isaca.org/ for more information.

Configuration Item (CI) (Service Transition) Any Component that needs to be managed in order to deliver an IT Service. Information about each CI is recorded in a Configuration Record within the Configuration Management System and is maintained throughout its Lifecycle by Configuration Management. CIs are under the control of Change Management. CIs typically include IT Services, hardware, software, buildings, people, and formal documentation such as Process documentation and SLAs.

Configuration Management Database (CMDB) (Service Transition) A database used to store Configuration Records throughout their Lifecycle. The Configuration Management System maintains one or more CMDBs, and each CMDB stores Attributes of CIs, and Relationships with other CIs.

Configuration Management (Service Transition) The Process responsible for maintaining information about Configuration Items required to deliver an IT Service, including their Relationships. This information is managed throughout the Lifecycle of the CI. Configuration Management is part of an overall Service Asset and Configuration Management Process.

ITIL (Information Technology Infrastructure Library) A set of Best Practice guidance for IT Service Management. ITIL is owned by the OGC and consists of a series of publications giving guidance on the provision of Quality IT Services, and on the Processes and facilities needed to support them. See http://www.itil.co.uk/ for more information.

IT Service A Service provided to one or more Customers by an IT Service Provider. An IT Service is based on the use of Information Technology and supports the Customer's Business Processes. An IT Service is made up from a combination of people, Processes and technology and should be defined in a Service Level Agreement.

IT Service Management (ITSM) The implementation and management of Quality IT Services that meet the needs of the Business. IT Service Management is performed by IT Service Providers through an appropriate mix of people, Process and Information Technology.

PMBoK (Project Management Body of Knowledge) A Project management Standard maintained and published by the Project Management Institute. See http://www.pmi.org/ for more information.

Service Catalog (Service Design) A database or structured Document with information about all Live IT Services, including those available for Deployment. The Service Catalogue is the only part of the Service Portfolio published to Customers, and is used to support the sale and delivery of IT Services. The Service Catalogue includes information about deliverables, prices, contact points, ordering and request Processes.

Service Knowledge Management System (SKMS) (Service Transition) A set of tools and databases that are used to manage knowledge and information. The SKMS includes the Configuration Management System, as well as other tools and databases. The SKMS stores, manages, updates, and presents all information that an IT Service Provider needs to manage the full Lifecycle of IT Services.

Service Level Agreement (SLA) (Service Design) (Continual Service Improvement) An Agreement between an IT Service Provider and a Customer. The SLA describes the IT Service, documents Service Level Targets, and specifies the responsibilities of the IT Service Provider and the Customer. A single SLA may cover multiple IT Services or multiple Customers.

Service Management A set of specialized organizational capabilities for providing value to customers in the form of services.

Service Management Lifecycle An approach to IT Service Management that emphasizes the importance of coordination and Control across the various Functions, Processes, and Systems necessary to manage the full Lifecycle of IT Services. The Service Management Lifecycle approach considers the Strategy, Design, Transition, Operation and Continuous Improvement of IT Services.

Service Portfolio (Service Strategy) The complete set of Services that are managed by a Service Provider. The Service Portfolio is used to manage the entire Lifecycle of all Services, and includes three Categories: Service Pipeline (proposed or in Development); Service Catalogue (Live or available for Deployment); and Retired Services.

Service Portfolio Management (SPM) (Service Strategy) The Process responsible for managing the Service Portfolio. Service Portfolio Management considers Services in terms of the Business value that they provide.

Service Provider (Service Strategy) An Organization supplying Services to one or more Internal Customers or External Customers. Service Provider is often used as an abbreviation for IT Service Provider.