



Vedang Software
Trained by Top Intellectual Heritage

ITIL 2011 Foundation Training & Certification Exam

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ITIL® Expert
Chief Mentor Vedang Software



Know your facilitator

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- **What I studied?**
 - BE NIT Surat (Electrical Engg), M.Tech IIT Delhi (Behavioral Sciences), Ph.D. IIT Delhi (Use of Computers in Education)
- **Who I live with?**
 - Parents & Children
- **Where I have been?**
 - NIIT Ltd, Network Programs, Nucleus Software GrapeCity Inc, Birlasoft Inc, New Horizons India Ltd & Vedang Software
 - Played role in technical (delivery / IT), functional (HR) and process areas
- **What I did?**
 - Courseware Developer, Software Developer – NIIT
 - Project & Program Management – IT Software
 - Head Training & Knowledge Management - BFSI
 - Head Software Delivery – Japanese MNC
 - Process Consultant – Japanese MNC
 - Head Campus Recruitment & Birlasoft Academy
 - Technology Head IT Training Major
 - Mentor & Consultant – IT / ITES businesses
- **What I am doing Now?**
 - Chief Mentor Vedang Software (www.vedangsoftware.com)
 - Technology Consultant Vedang Jyotish (www.vedangjyotish.com)






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Agenda:

This training intends to provide you basic level understanding of ITIL® (Foundation) so that –


- You can understand the vocabulary of IT Service Management
- You have basic concepts of IT Service Management
- You take these concepts back to your work
- You can take ITIL Foundation exam



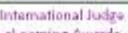


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What is a Service?

- And Service Outlook


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Let's learn from a little boy




- This is the story of a small boy who called up the lady of a house offering to clean her garden at half of the price of what the current gardener was charging
 - She said No..
- The boy insisted again, she again said No
 - The boy pleaded again but finally hung up...




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Let's learn from a little boy...



- Owner of the departmental store from where the boy called, offered job to the boy, thinking that the poor boy was in dire need
 - Boy said, “**No Sir, thank you**”..
- The owner was surprised and asked why the boy was begging for the cleaning job from that lady if he did not need one.
 - Boy said, “**Sir, I work for the same lady, I was just checking the quality of my services to her**”.....






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What is a Service?

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- A **Service** is a means of delivering value to customers, by facilitating **outcomes** the customers want to achieve without the ownership of specific **costs and risks**
 - When we hire a taxi to airport do we own the costs and risks?
- **Service Outlook**
 - “thinking with totality of user experience

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What is Industry Today?

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- IT / ITES
 - BPO / KPO / LPO / CRO
- Banking / Finance / Insurance
 - Plastic Money / Virtual Money
 - Overflowing FDIs / NRIs, HNIs becoming VCs
- FMCG
 - Packed Food, New Products, New Concepts
- Education
 - More than 2000 professional colleges only in India today
- Tourism
 - Growing day by day
- Manufacturing / Auto
 - Core engineering, branches like Civil, Mechanical, Electronics all are shining back
- Telecom
 - Leading world players in domestic markets
 - Everyone owns a cellphone, millions of users, connected networks
- Retail
 - Malls, Multiplexes everywhere
- Real Estate / Construction
 - Boom Everywhere, increasing property rates
- Media / Fashion / Textile
 - Do our parents know Job Titles like RJ, VJ?
- Aviation
 - 5 Years ago what was Aviation?
- Hospitality / Hotels
 - No one thought of Event Management earlier?
 - Today people outsource their marriage
- Medical
 - Need of the time
- Medical Tourism
 - Medical aid is very costly there
- And New things like Online betting and many more
 - Have you seen the movie Luck?

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Key Features of Industry Segments

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- Industry is moving towards being a Service Industry
 - So there is need of Service Management today
- Information Technology is playing a very strategic role in every sector
 - You can't scale up without a very effective use of IT in your business
- Increasing competition leads to outsourcing / strategic partnerships
 - Should I buy a taxi and own it if 20 people travel to airport daily (@ 1000 per person)


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Is IT a Service?

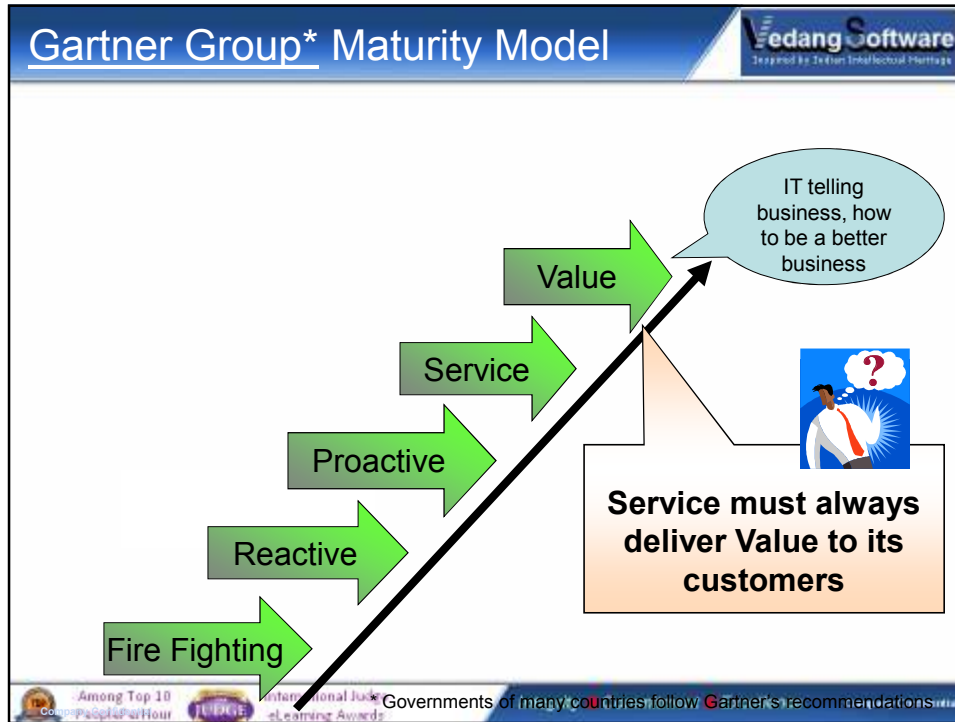
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- Yes and if IT is,
 - We need the discipline of

IT Service Management
- If IT is a Service then it needs to be managed.
- ITSM is the discipline of managing IT as a service
- There are **4 Ps of Service Management**; they are **People**, **Process**, **Products** and **Partners**



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Service Management as a Practice

- **Service Management**
 - is a set of organizational capabilities for providing value to customers in the form of services


The slide features a blue header with the title "Service Management as a Practice" and the Vedang Software logo. The main content is a bulleted list defining Service Management. To the right of the text is an icon of a man in a white shirt and red tie with a question mark in a thought bubble. The footer contains several award logos and the company's core values: Integrity, Commitment, and Excellence.


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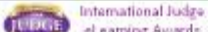
IT Service Management



- What is it?
 - The effective and efficient, process driven management of quality IT services
- What is the added value?
 - ITSM is business aligned and maintains a holistic Service Lifecycle approach
- Implementing ITSM in an organization provides gradual improvement





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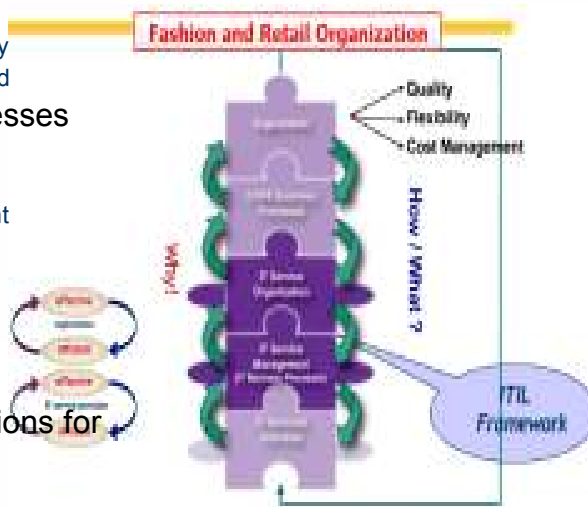
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Business and IT Alignment



- Objectives
 - We want to make money
 - We want to build a brand
- Core Business Processes
 - Retail (inc POS)
 - Marketing
 - Buying and Procurement
- IT Services
 - Website, Email
 - Procurement System
 - Point of Sale
 - PCs, Networks, Servers
- ITSM ensures provisions for
 - What we need
 - Available when needed
 - At the right cost




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IT Infrastructure Library (ITIL)

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- The most commonly used **IT Service Management Best Practice** today
- It's a public framework
- Public frameworks are **preferred** over proprietary framework since the later is often undocumented 
- ITIL is supported by **complimentary guidance** which means knowledge specific to an industry sector 

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How did it come into existence

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- UK Govt, realizing that the services from IT vendors were not up to the mark started documenting the expectations from IT vendors
 - as documented guidelines
- Companies in Europe adopted the guidelines in early 1990
 - They had little choice
- Got worldwide attention when Microsoft used ITIL for developing its proprietary framework
 - i.e. MOF (Microsoft Operations Framework)
- ITIL version 2.0 was released in 2001
 - Usage got spread in the industry and got worldwide recognition

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What happened after that?

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- The industry started using the framework and also realized benefits
- It got momentum of being a community learning
- Organizations using ITIL
 - J.D. Edwards & Company, KPMG, Legal & General Insurance, Lucent Technologies, Mackenzie Financial Corp., Manulife Financial, Menominee Indian Tribe of Wisconsin, Merrill Lynch, Microsoft Corp., Mutual Life Assurance Company, National Westminster Bank, Nesbitt Burns, Network Associates, Ontario Hydro, Oracle, Perot Systems
 - UK Post Office, Peregrine Systems, Procter & Gamble, Remedy Corp., Royal Bank of Scotland, Royal Mail, Scottish Provident, Shell, GlaxoSmithKline, Standard Life Assurance, The Equitable Insurance Company, Toronto Dominion Bank, Union Gas, Virginia Power, Vodafone, Zurich Insurance

... And many more

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Organisations using ITIL Worldwide


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<p>ABN-AMRO Bank Aetna Life Insurance AT&T Solutions Australia Post AXA Insurance Group Bank of Canada Bank of Montreal (Cebra, Harris Bank) Barclays Bank Bass Breweries British Airways British Telecom Cable & Wireless Canadian Fed. & Prov. Governments Capital One Services CGI CIBC</p>	<p>Computer Sciences Corporation Consumers Gas DLJ Pershing Dutch Land Registry Office Dutch Railways EDS Exxon Federal Express GE Capital General Accident Great West Life Guinness/UDV Hewlett Packard Hong Kong & Shanghai Bank IBM/ISM ING Bank</p>
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... And many more

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Some Testimonials




- **Procter & Gamble**
 - Started using ITIL in 1999 and realized a 6% to 8% cut in operating costs within first year
 - Another ITIL project has reduced help desk calls by 10%.
 - In four years, the company reported overall savings of about \$500 million.




Testimonials (contd)



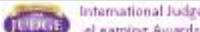

- **Caterpillar**
 - Embarked on a series of ITIL projects in 2000.
 - After applying ITIL principles, the rate of achieving the target response time for incident management on Web-related services jumped from 60% to more than 90%.



Testimonials (contd)




- **Nationwide Insurance**
 - Implementing key ITIL processes in 2001 led to a 40% reduction of its systems outages.
 - The company achieved a \$4.3 million ROI over the next three years





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ITIL – A Paradigm Shift




- Unlike the other process frameworks / standards it certifies people and not the organizations
 - An organization can be only as good as the people working with
- An established and well defined certification scheme is in place to support ITIL.
 - This comprises three distinct levels:
 - Foundation, Practitioner and Manager



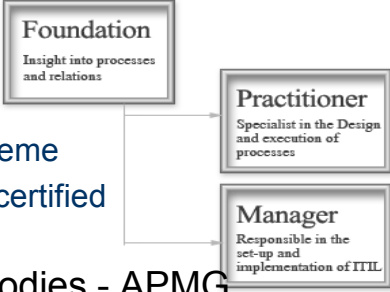
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ITIL – Made a difference


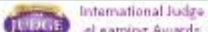




- Different from ISO, CMM..
- Focused on People
 - Well defined certification scheme
 - Customers ask for # of ITIL certified employees in their RFPs
- International Certification Bodies - APMG
 - EXIN
 - European Examination Institute for Information Science
 - ISEB
 - The Information Systems Examination Board
 - Testing
 - Prometric Centers, TUV, ATOs




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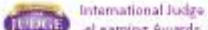


graph TD
    Foundation[Foundation  
Insight into processes  
and relations] --> Practitioner[Practitioner  
Specialist in the Design  
and execution of  
processes]
    Practitioner --> Manager[Manager  
Responsible in the  
set-up and  
implementation of ITIL]
  
```


Why Certify?



- ITIL aware professionals make an organization
 - Motivated, Cost effective, Productive, Service and customer oriented, planned and structured and therefore ahead of competition
- ITIL certified professionals are sought after in the industry today
- Knowing the benefits :
 - The customers push vendors to have their people ITIL aware and certified
 - Number of ITIL certified employees is a key item in many RFQs from customers
 - Employers are pushing their employees to get ITIL aware and certified
 - It is generally being linked to the appraisal system in many organizations today


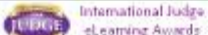






Service Delivery & Support




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- **Service Delivery**
 - When you prepare for the service
 - The homework which you do before introducing the service into live environment
- **Service Support**
 - The support which you provide to the users who use your service



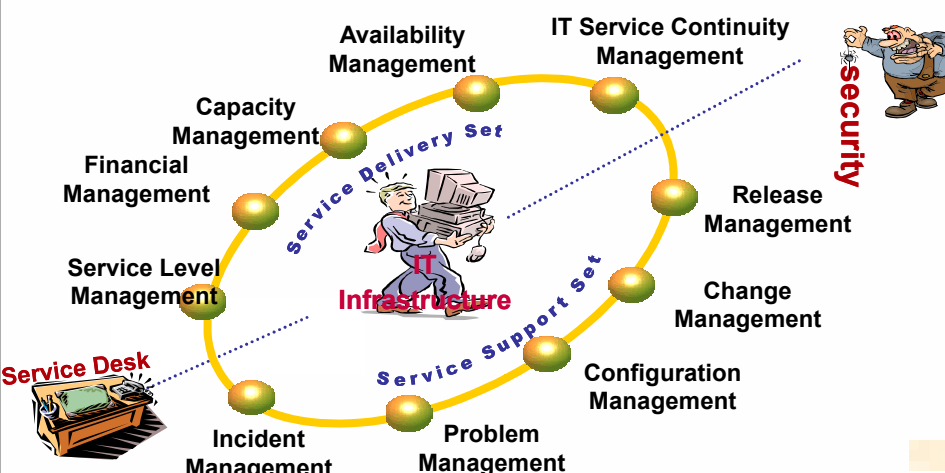



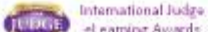
ITIL v2.0 - In common use





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- **Service Support & Service Delivery Sets**








ITIL Version 3 Model

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- ITIL v3.0 provides world recognized best practices for ITSM
 - Sources for best practices include
 - Public Frameworks
 - Standards
 - Proprietary knowledge of organizations
 - Generally best practices are those that are successful in wide industry use – **how others are doing it**




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The Five Phases


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- Service Strategy: To attain market focus
 - Where and how to compete? Setting Policies & Objectives
- Service Design: To prepare it the best
 - With optimized constraints
- Service Transition: Managing Changes
 - With smooth transition
- Service Operation: Handhold your customers
 - Provide Stable ongoing support
- Continual Service Improvement
 - Make it better and better (Learning & Improvement)


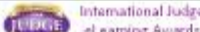




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What is in the books?




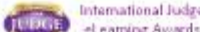


- **Service Strategy - Practical Decision-Making**
 - Helps the Top Management take appropriate business decisions
 - Provides guidance on Policies and Setting objectives
- **Service Design - Pragmatic Service Blueprint**
 - Focuses on design of Service Models, technology architecture, process and measurement systems
 - Decisions on: Outsource, shared services, co-source models? How to decide & how to do it
- **Service Transition: Managing change, risk & QA**
 - Supports
 - Managing organization & cultural change during transition
 - Control on the changes, keeping the SKMS update
 - Provides handholding support to service operation
 - ELS
- **Service Operation: Responsive, stable services**
 - Through
 - Service Desk and other functions and processes
- **Continual Service Improvement: Measures that mean something & improvements that work**
 - Ensures
 - Overall health of ITSM
 - Portfolio alignment in real
 - Growth and maturity of Service Management practice

3 Implementation Levels



- **Strategic Level:** Where decisions are made, policies set & funding levels are set
- **Tactical Level:** Where decisions and policies are implemented within the allotted budgets
- **Operational Level:** Where decisions translate into day-to-day actions and policies affect working practices within financial constraints

2 Escalation Models

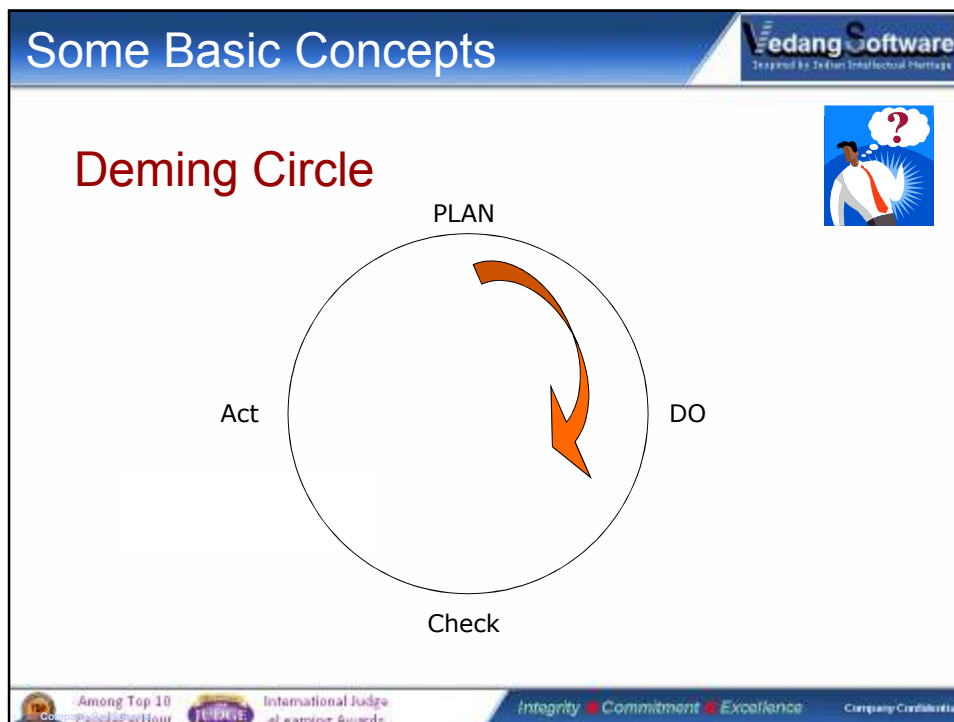
- Horizontal or Functional
 - Throw more expertise

- Vertical or Hierarchical
 - Throw more power

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ITIL New Qualification scheme

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What is a Function?

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- A department, a group of people working together to deliver an important set of tasks, examples of functions include HR, Admin, SysAdmin, Finance etc
- A function is a logical concept that refers to the people and automated measures and executes
 - a defined process, an activity or
 - a combination of processes or activities
- In larger organizations a function may be broken up and performed by several departments, teams and groups, or it may be embodied within a single organizational unit.

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What is a Process?




- A series of steps, all processes have specific characteristics. These are:
 - 1. It is measurable
 - 2. It delivers a specific result
 - 3. It responds to a specific event
 - 4. It delivers its primary results to a customer or stakeholder
- A process does not necessarily need to be timely



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More..



- Procedure:
 - A Set of how to
- Roles: A Set of responsibilities
 - Defined in a process and assigned to a person or team.
 - One person or team may have multiple roles

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Used for a process or a service

• Critical Success Factors (CSF):

- Conditions that **are critical/must be fulfilled** in order to achieve the goal(s) of a process
- Example: Central Service Desk is **Single Point of Contact (SPOC)** for all user requests, complaints, reports ...
 - If SPOC principle is violated, a process can be undermined

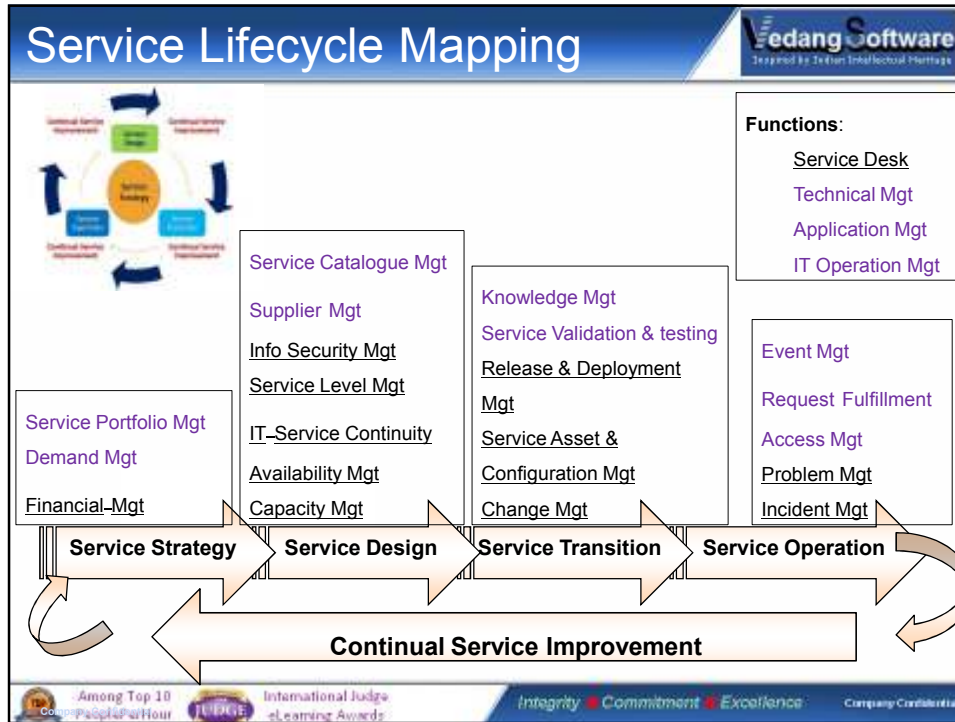
• Key Performance Indicators (KPI):

- Metrics indicating the **degree of success** of a process
- Example: Reduction of average **Mean Time To Repair (MTTR)**
 - Low MTTR indicates a successful Incident Management process

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Service Strategy

Making sense of the largest picture
Practical Decision Making



Goals & Objectives of SS

Goal is to help service providers to

- operate and grow successfully in the long-term
- provide the ability to think and act in a strategic manner

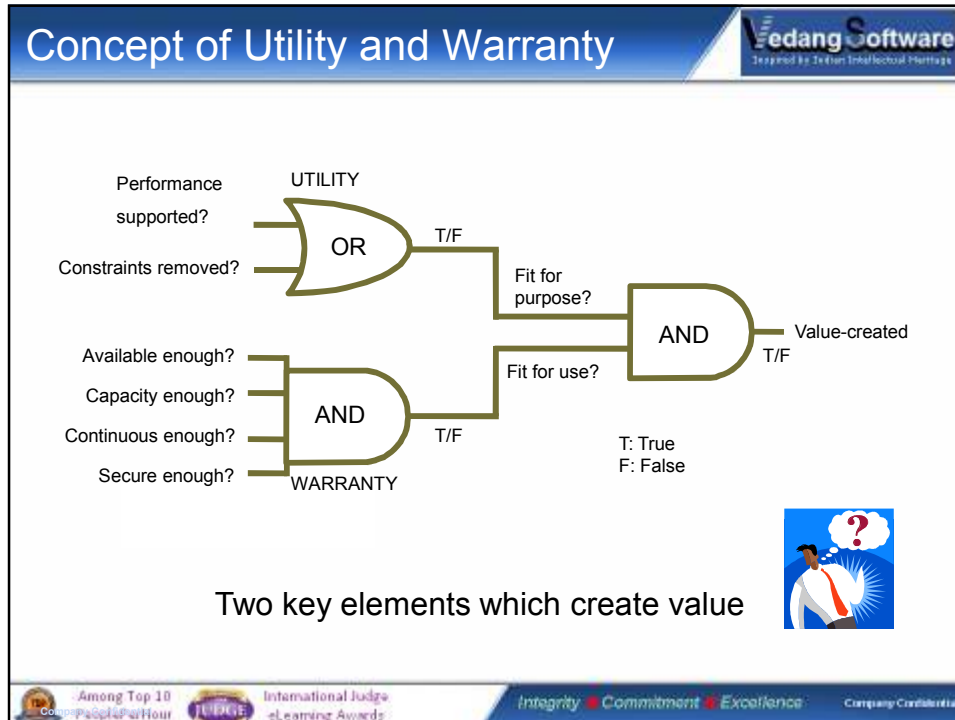
Objectives:

- To provide direction for
 - Growth
 - Prioritizing investments and
 - Defining outcomes

against which the effectiveness of service management is measured

- To influence organizational attitudes and culture towards the creation of value for customers through services
- To ensure effective communication, coordination, and control among various parts of a service organization

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Resources and Capabilities


Tangible & Intangible Assets

Capabilities		Resources	
A1	Management	Financial capital	A9
A2	Organization	Infrastructure	A8
A3	Processes	Applications	A7
A4	<u>Knowledge</u>	<u>Information</u>	A6
	People	People	A5


SS – Four Main Activities




- 1. Define the market**
- 2. Develop the offerings**
- 3. Develop strategic assets**
- 4. Prepare for execution**

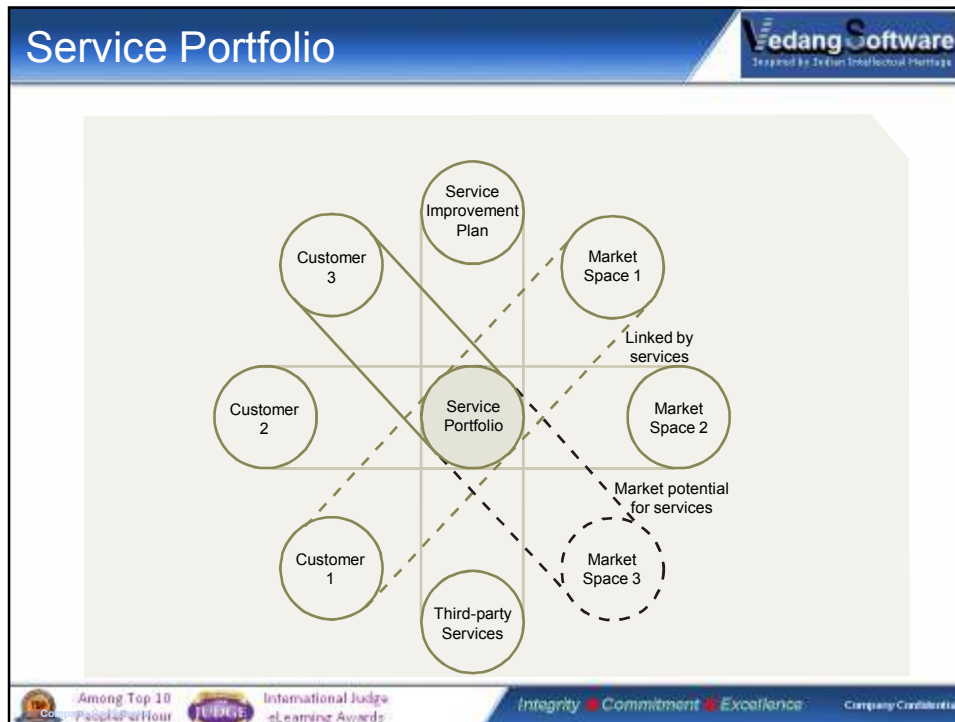


Processes in Service Strategy (SS)



- 1. Service Portfolio Management (SPM)**
- 2. Demand Management**
- 3. Finance Management**



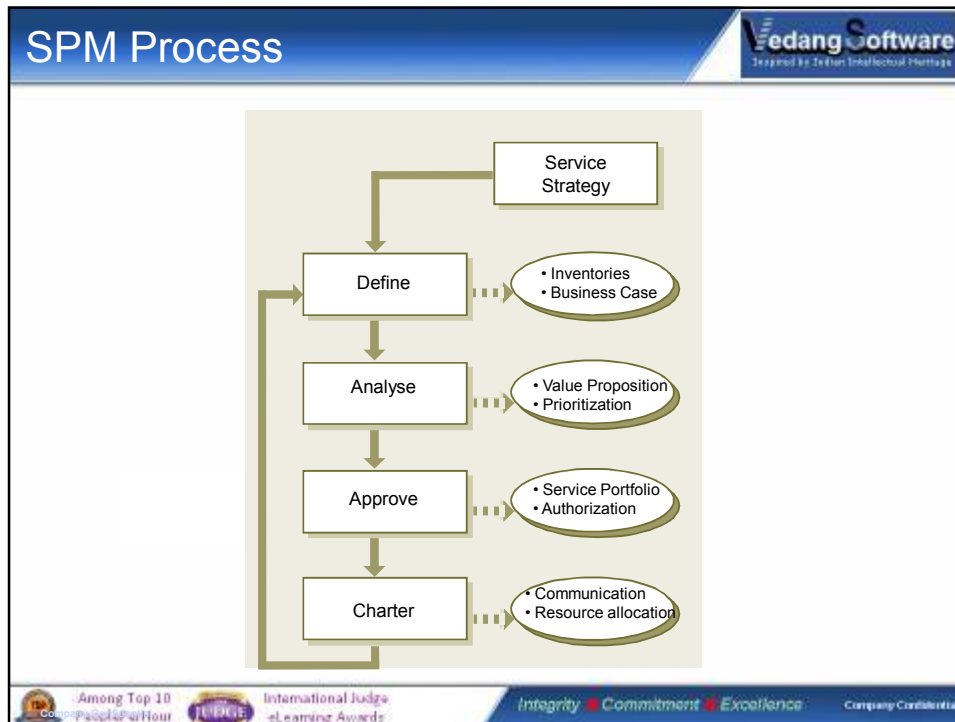


SPM – Goal & Objectives

- Goal of SPM is to Manage Service Portfolio by considering services in terms of the **business value** they provide**


Service Portfolio Management is a dynamic method for governing investments in service management across the enterprise and managing them for value.





Understanding SLP


SLP: a defined level of Utility and Warranty for a particular Service Package.




Each SLP is designed to meet the needs of a Pattern of Business Activity PBA

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RACI Model




- The RACI model suggested in service strategy helps in defining roles and responsibilities
 - R – Responsible
 - A – Accountable
 - C – Consulted
 - I – Informed
- One of more persons can be responsible for a task but only one person can be accountable
- Process owner is an I in the RACI matrix, what is expected out of him?




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Risk & Investment Decision



Risk



Venture New Market	Transform the Business (TTB)
Growth New services – Existing market	Grow the Business (GTB)
Discretionary Enhance existing services	
Non-Discretionary Maintain Existing services	Run the Business (RTB)
Core Maintain Business critical services	

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Demand Mgmt – Goal & Objectives

Goal

- To understand and influence Customer demand for Services and
 - Provide capacity to meet these demands

Please note:


- At a Strategic level Demand Management can involve analysis of Patterns of Business Activity and User Profiles.
- At a Tactical level it can involve use of Differential Charging to encourage Customers to use IT Services at less busy times.
- It is very closely linked to capacity management



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Finance Management – Objectives

- Enhanced decision making
- Speed of change
- Service Portfolio Management
- Financial compliance and control
- Operational control
- Value capture and creation




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Activities of FM




- **Budgeting**
- **Accounting**
- **Reporting**
- **Charging**
 - **Concept of Differential charging**




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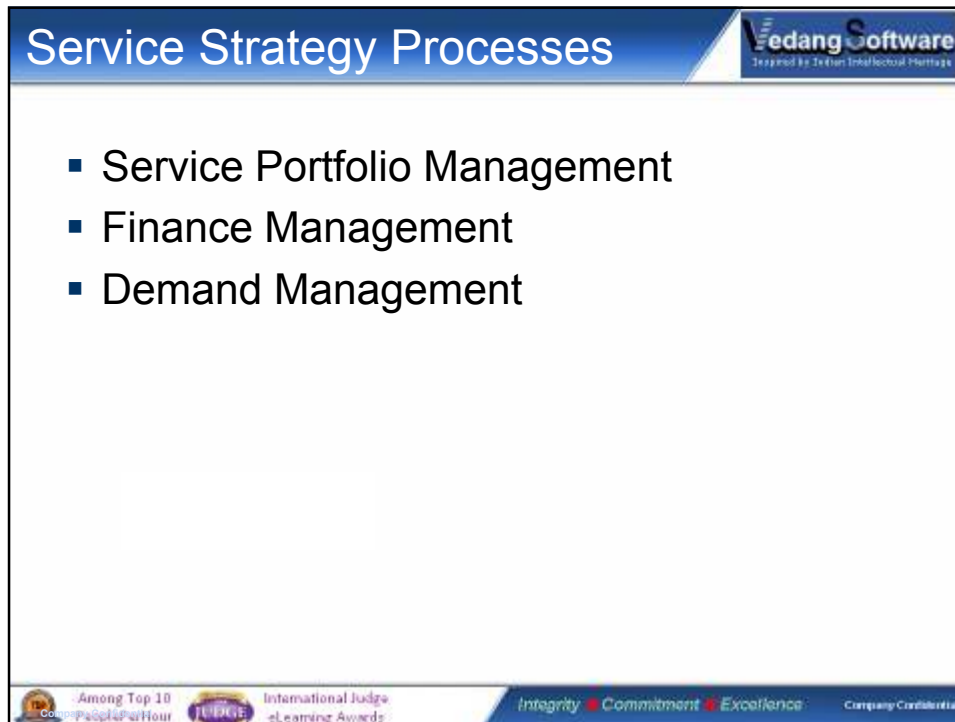
Typical Business Case Structure



- **Introduction**
 - Presents the business objectives addressed by the service
- **Methods and assumptions**
 - Defines the boundaries of the business case, such as time period, whose costs and whose benefits
- **Business impacts**
 - The financial and non-financial business case results
- **Risks and contingencies**
 - The probability that alternative results will emerge.
- **Recommendations**
 - Specific actions recommended.



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Service Strategy Processes

- Service Portfolio Management
- Finance Management
- Demand Management

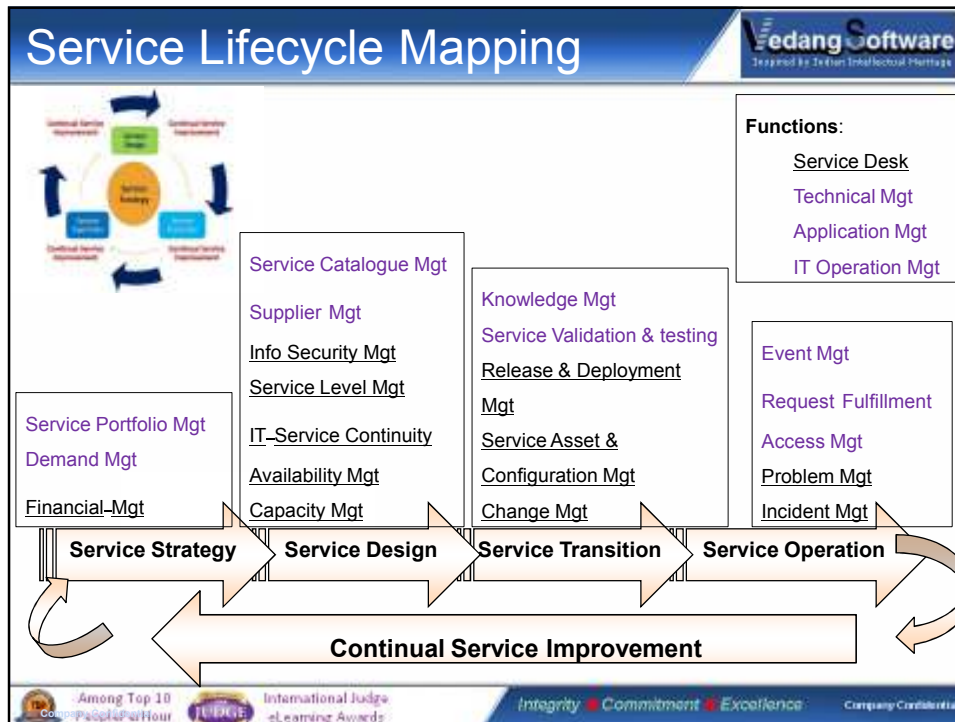
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Service Design
Pragmatic Service Blueprint

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- ## Goals & Objectives of SD
- **Designing**
 - services to satisfy business objectives, based on the quality, compliance, risk and security requirements
 - **Delivering**
 - more effective and efficient IT and business solutions and services aligned to business needs
 - **Coordinating**
 - all design activities for IT services to ensure consistency and business focus
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Service Design Helps to




- Reduce Total Cost of Ownership (TCO)
- Improved quality & consistency of service
- Better handling of new or changed services
- Improved service alignment with business
- Improved IT governance
- More effective SM and IT processes




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Five major areas of Service Design



1. Service Portfolio Design
 - Understand Service Portfolio, the SLPs and the Service Models (i.e. Structure and Dynamics)
2. Service Design
 - Identification of Business Requirements, definition of Service requirements and design of Services
3. Technology and architectural design
4. Process design
 - The Process Steps for each phase in Life Cycle
5. Measurement design
 - What all will be measured for each Process, Service and Technology Item (PST)




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Measurement Design

'If you can't measure it you can't manage it.'

Four types of metrics


- **Progress**: milestones and deliverables in the capability of the process
- **Compliance**: compliance of the process to governance requirements, regulatory requirements and compliance of people to the use of the process.
- **Effectiveness**: the accuracy and correctness of the process and its ability to deliver the 'right result'
- **Efficiency**: the productivity of the process, its speed, throughput and resource utilization.



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Different Sourcing Approaches

- **In sourcing** – Utilizing internal resources
- **Outsourcing** – Utilizing resources external organisation.
- **Co-sourcing** – Often a combination of in & out sourcing
- **Partnership or multi-sourcing** – Strategic partnerships
- **Business Process Outsourcing (BPO)** – Entire business process or function outsourced
- **Application Service Provision (ASP)** – Applications on demand
- **Knowledge Process Outsourcing (KPO)** - Domain-based processes and business expertise



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Service Design Package

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- Document (s) defining all aspects of an IT Service and its Requirements through each stage of its Lifecycle.
- A Service Design Package is produced for each new IT Service, major Change, or IT Service Retirement.
 - SDP not produced for an emergency change

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SCM - Scope, Goals & Objectives

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The goal is to ensure :

- that a Service Catalogue is produced and maintained,
- it contains accurate information on all operational & planned services

Objectives:

- manage the information contained within the Service Catalogue
- ensure accuracy in
 - current details, status, interfaces and dependencies of all services in scope

Scope:

- All services that are being transitioned or have been transitioned to the live environment

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SCM – Basic Concepts



- **Business Service Catalogue** contains
 - details of all the **Business** services
 - relationships to the business units and
 - business process that rely on the IT services
(This is the customer's view of the Service Catalogue)
- **Technical Service Catalogue** contains
 - details of all the IT services
 - relationships to the supporting services
 - shared services, components and CIs necessary to support the provision of the service to the business
(As you see it from inside)

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SCM – Activities



- All services in operation are recorded in Service Catalogue
- Ensure that the Information in Service catalogue is
 - Accurate
 - Up-to-date
 - Consistent
 - Backed up

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SLM - Goals

The goal of Service Level Management is to ensure that:


- An agreed level of IT service is provided for all current IT services
- Future services are delivered to agreed achievable targets
- Proactive measures are taken to seek and implement improvements to the level of service delivered

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SLM - Process



- Service Catalogue (Technical & Business)
- SLR - Service Level Requirements
- SLA - Service Level Agreement
 - OLA - Operational Level Agreement
 - UC - Underpinning Contract
- Measurement
- Service Reporting
- SIP - Service Improvement Program

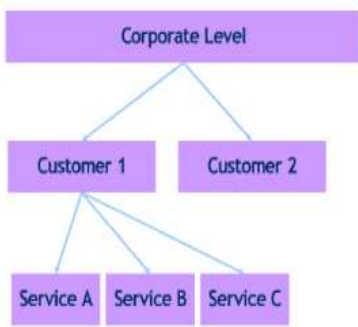


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Designing SLA Structures

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- **Multilevel SLAs**
 - Reduces duplication of effort while still providing customization
 - At corporate level
 - All generic issues are covered
 - At customer level
 - Issues specific to the customer are covered
 - At Service Level
 - All issues relevant to specific service in relation to a specific customer are covered



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Service Provider & Types


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- **Service Provider:** An organization supplying services to one or more Internal External Customers
 

Service Provider is often used in short for IT Service Provider
- There are three archetypes of business models for service provisioning:
 - Type I – internal service provider
 - Type II – shared services unit
 - Type III – external service provider

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SLM – Key Activities



- Be aware of changing business needs
- Ensure all SLRs are identified, understood and documented
- Negotiating and agreeing service levels (internal or external) 
- Formally documenting these levels of service in SLAs / OLAs
- Ensure an accurate Service Portfolio, Service Catalogue and all SLM documents
- Report through SLAM Chart

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SLM – Challenges



- Who do we negotiate with?
- A lack of accurate input, involvement and commitment from the business and customers
- The tools and resources required to agree, document, monitor, report and review agreements and service levels
- The process becomes a bureaucratic, administrative process rather than an active and proactive process delivering measurable benefit to the business

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SLM – KPIs



- Percentage reduction in 'SLA targets missed'
- Percentage reduction in 'SLA targets threatened'
- Percentage increase in customer perception and satisfaction of SLA achievements, via service reviews and Customer Satisfaction Survey responses
- Percentage reduction in SLA breaches caused because of third-party support contracts (underpinning contracts) & internal OLAs.

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Availability Mgt - Goals & Scope




Goal : to ensure that

- level of service availability delivered in all services is
- matched to or exceeds
- the current and future agreed needs of the business
- in a cost-effective manner

Scope :

- Designing, implementation, measurement, management and improvement of
- IT service and component availability
 - And Not the business process



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Availability – Basic Concepts


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- **Fault tolerance** (Resilience)
- **Availability** (MTBF)
- **Reliability** (MTBSI)
- **Maintainability** (MTTR)
- **Serviceability** (Third Party)

$MTBSI = MTBF + MTTR$

FARMS

- **Vital Business Function**




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Definitions


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- **Availability**
 - The ability of a service, component or CI to perform its agreed function when required. It is often measured and reported as a percentage
- **Reliability**
 - A measure of how long a service, component or CI can perform its agreed function without interruption.
- **Serviceability**
 - The ability of a third-party supplier to meet the terms of their contract. Often this contract will include agreed levels of availability, reliability and/or maintainability for a supporting service or component
- **Maintainability**
 - A measure of how quickly and effectively a service, component or CI can be restored to normal working after a failure.
- **Fault tolerance**
 - The ability of an IT service, component or CI to continue to operate correctly after failure of a component part.
- The term **Vital Business Function (VBF)** is used to reflect the business critical elements of the business process supported by an IT service




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Availability Management




- Produce and maintain Availability Plan
- Provide advice and guidance on all availability-related issues
- Ensure availability achievements meet agreed targets
- Assist with the diagnosis and resolution of availability related incidents and problems
- Ensure proactive and cost-effective measures to improve the availability




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ISM (Information Security Mgmt) –



- **The goal** of the ISM process is to align IT security with business security and ensure that information security is effectively managed in all service and Service Management activities
 - ISM must ensure that an Information Security Policy is produced, maintained and enforced
- **Scope** - The ISM process should cover use and misuse of all IT systems and services for all IT security issues
- **Important:** ISP should be available to All




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ISM

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- **The objective of information security management is to**
 - protect the interests of those relying on information, systems and communications from harm resulting from failures of
 - Availability
 - confidentiality and
 - integrity
- An effective **Information Security Policy** available to everybody internal or external to the organization



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Supplier Management

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- To manage suppliers and related information, ensuring value for money.
- Scope includes all suppliers and contracts needed to support the IT services

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SM – Basic Concepts

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- The Supplier and Contracts Database (SCD)
- Supplier and Contract Management and performance information and reports
- Supplier categorization 

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SM – Responsibilities

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- Providing assistance in the development and review of SLAs, contracts, agreements or any other documents for third-party suppliers
- Maintaining and reviewing a Supplier and Contracts Database (SCD)

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Capacity Management

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- **The goal** of the Capacity Management process is to ensure that
 - cost-justifiable IT capacity is matched to the current and future agreed needs of the business in a timely manner
- **Scope :**
 - IT Services
 - IT Components
 - Resources




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Capacity Management – Concepts


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- **Balancing costs against resources needed**
- **Balancing supply against demand**
 - **Business Capacity Management**
 - **Service Capacity Management**
 - **Component Capacity Management**



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Capacity Management - Methods




- **Application Sizing**

 - To estimate the resource requirements to support a proposed change to an existing service (through extrapolation)
- **Modeling**


 - To predict the behaviour of IT services under a given volume and variety of work.
- **Demand Management**

 - To influence user and customer demand for IT services and manage the impact on IT resources.

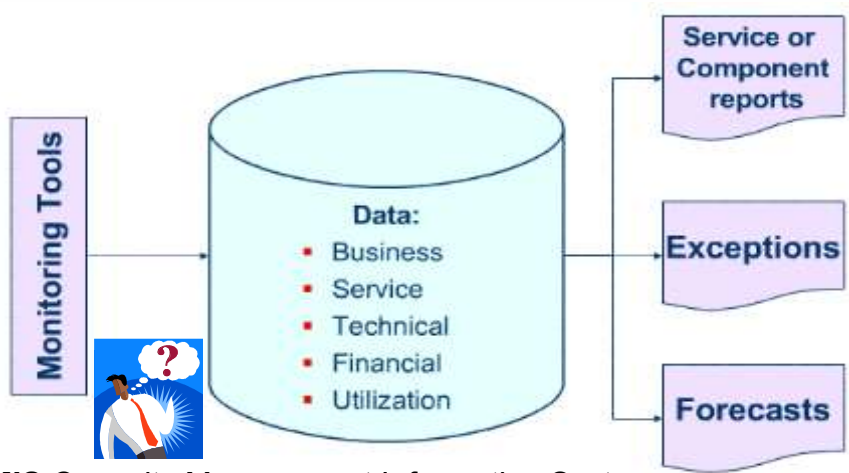


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Capacity Database



- Logical Database not just one physical database



The diagram shows a central cylinder labeled 'Data' containing a list: Business, Service, Technical, Financial, and Utilization. To the left, a vertical box labeled 'Monitoring Tools' has an arrow pointing to the cylinder. To the right, three boxes labeled 'Service or Component reports', 'Exceptions', and 'Forecasts' have arrows pointing from the cylinder to them. A small icon of a person thinking with a question mark is positioned below the 'Monitoring Tools' box.

CMIS Capacity Management Information System

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Capacity Management – Responsibilities

- Ensuring adequate IT capacity to meet required levels of service
- Identifying capacity requirements of business
- Understanding the current usage profile and the maximum capacity
- Sizing all proposed new services and systems, to ascertain capacity requirements

(Above points apply to IT Services as well as IT Components)


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ITSCM – Basic Concepts

- **Disaster** - an event that affects a service or system such that significant effort is required to restore the original performance level 
- **Business Impact Analysis**
The purpose of a Business Impact Analysis (BIA) is to quantify the impact to the business that loss of service would have

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ITSCM - Goal & Scope




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- **Goal**
 - Support the larger business continuity plan
- **Objective**
 - To ensure that required IT technical and service facilities can be resumed within required, and agreed, business timescales following a major disruption
- **Scope**
 - Services, computer systems, networks, applications, data repositories, telecommunications, environment, technical support and Service Desk
 - Also includes resources (People)

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ITSCM Stages




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Stage 1 Initiation	Initiate BCM
Stage 2 Requirements and Strategy	Business Impact Analyse
	Risk Assessment
	Business Continuity Strategy
Stage 3 Implementation	Organisation and Implementation Planning
	Implement Stand-by Arrangements
	Develop Recovery Plans
	Implement Risk Reduction Measures
	Develop Procedures
Stage 4 Operational Management	Initial Testing
	Review and Audit
	Testing
	Change Management
	Training
	Education and Awareness
	Assurance

Cold Standby
More than 72 hours


Warm Standby
24 to 72 hours

Hot Standby
Less than 24 hours



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ITSCM – Responsibilities



- Performing Business Impact Analyses for all existing and new services
- Implementing and maintaining the ITSCM process, in accordance with the organization's BCM process
- Ensuring ITSCM plans, risks and activities are capable of meeting the agreed targets under all circumstances
- Performing risk assessment and risk management to avert disasters where practical

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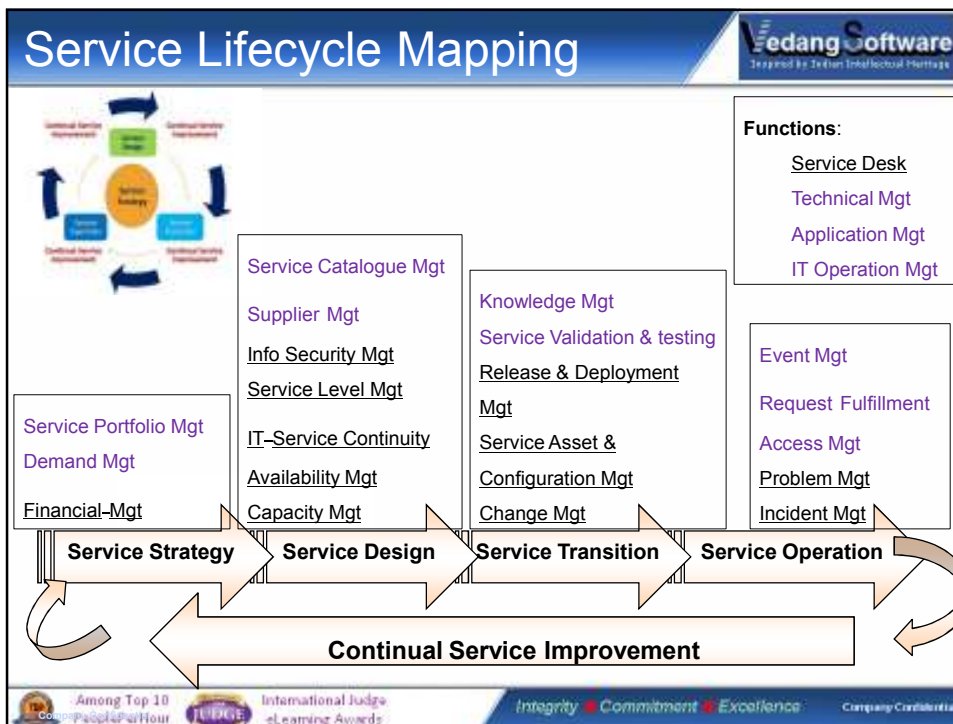
Service Design Processes



- **Service Catalogue Management**
- **Service Level Management**
- **Capacity Management**
- **Availability Management**
- **Service Continuity Management**
- **Information Security Management**
- **Supplier Management**




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Service Transition Helps




- Set customer expectations on the performance and use of the new or changed service
- Ensure there is minimal unpredicted impact while introducing new services
- Increase proper use of the services and underlying applications and technology solutions
- Provide clear and comprehensive plans for transition




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Change Management – Objectives



- The objective of the Change Management Process is :
 - To ensure that changes are recorded and then evaluated, authorized, prioritized, planned, tested, implemented, documented and reviewed in a controlled manner.




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Service Change

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- 'The addition, modification or removal of authorized, planned or supported service or service component and its associated documentation.'
- The Service Portfolio provides a clear definition of all current, planned and retired services.




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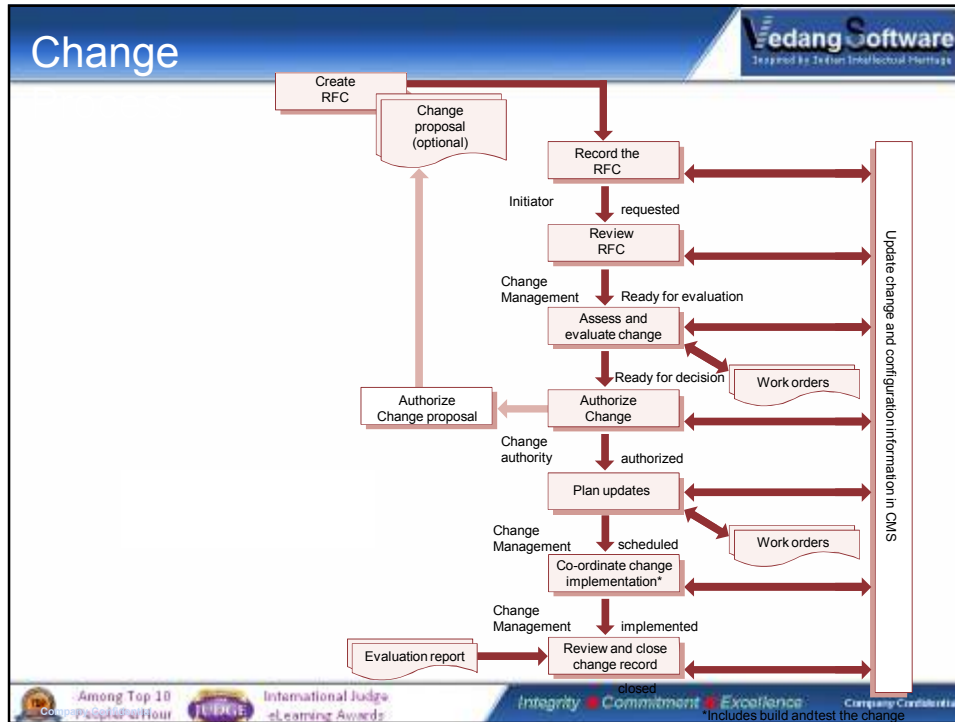
Change types

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- Normal Change
 - Regular **Default** change
- Standard Change
 - Pre – authorized
- Emergency Change
 - Which must be introduced ASAP
 - ECAB



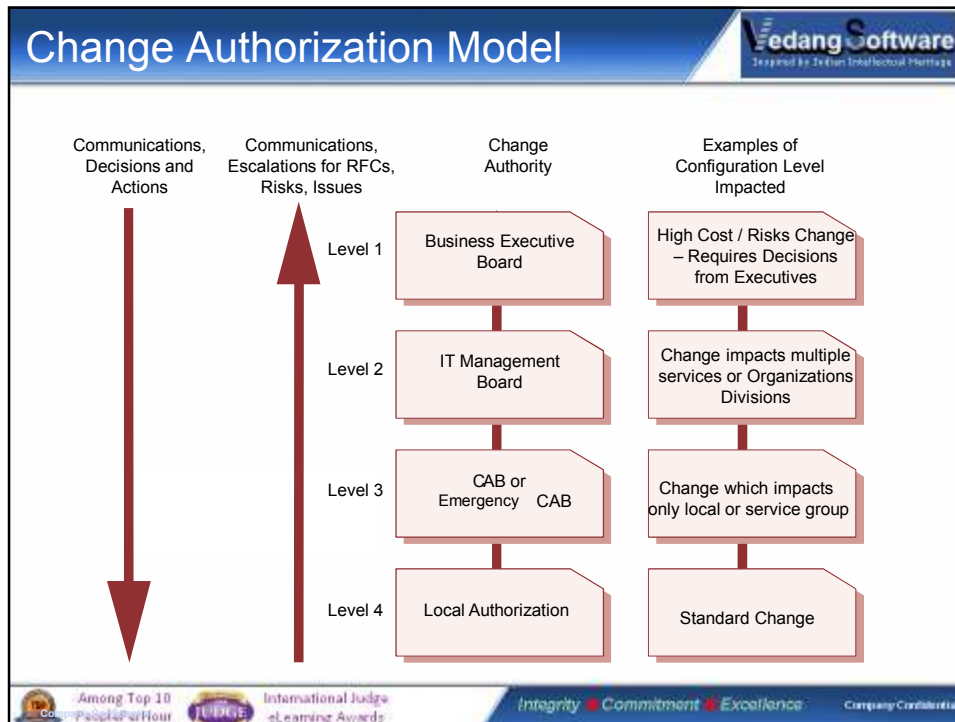
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Seven R's of Change Management

- Who RAISED the change?
- What is the REASON for the change?
- What is the RETURN required from the change?
- What are the RISKS involved in the change?
- What RESOURCES are required to deliver the change?
- Who is RESPONSIBLE for the build, test and implementation of the change?
- What is the RELATIONSHIP between this change and other changes?

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Change Management – KPIs

- The top five risk indicators of poor Change Management are:
 - Unauthorized changes
 - Above zero is unacceptable
 - Unplanned outages
 - A low change success rate
 - A high number of emergency changes
 - Delayed project implementations.

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Change Management – Challenges




- Lack of ownership of the impacted systems
- Inaccurate configuration data may result in poor impact assessments
- Bypassing the agreed procedures
- There may be resistance against an umbrella of Change Management authority

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SACM - Scope




- Asset Management covers service assets across the whole service lifecycle. It provides a complete inventory of assets and who is responsible for their control.
- It includes:
 - Full lifecycle management of IT and service assets, from the point of acquisition through to disposal
 - Maintenance of the asset inventory.
 - interfaces to internal and external service providers where there are assets and configuration items that need to be controlled, e.g. shared assets.




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SACM – Objectives




- To define and control the components of services and infrastructure and maintain accurate configuration information on the historical, planned and current state of the services and infrastructure.




Configuration Management System




- A set of tools and databases that are used to manage an IT Service Provider's Configuration data.
- The CMS also includes information about Incidents, Problems, Known Errors, Changes and Releases; and may contain data about employees, Suppliers, locations, Business Units, Customers and Users.
- The CMS includes tools for collecting, storing, managing, updating, and presenting data about all Configuration Items and their Relationships.
- The CMS is maintained by Configuration Management and is used by all IT Service Management Processes.


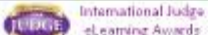



Configuration Item (CI)




- CI: Any Component that is managed the formal control of Change Management
- Information about each CI is recorded in a Configuration Record within the Configuration Management System and is maintained throughout its Lifecycle by Configuration Management.







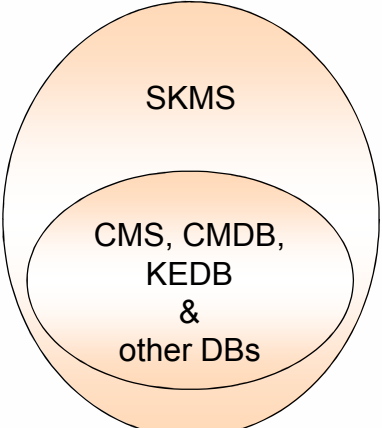



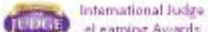
Configuration Item - CI





- Scope:
- CIs typically include
 - IT Services
 - Hardware
 - Software
 - Buildings
 - People
 - Formal Documentation
 - e.g. Process documentation and SLAs

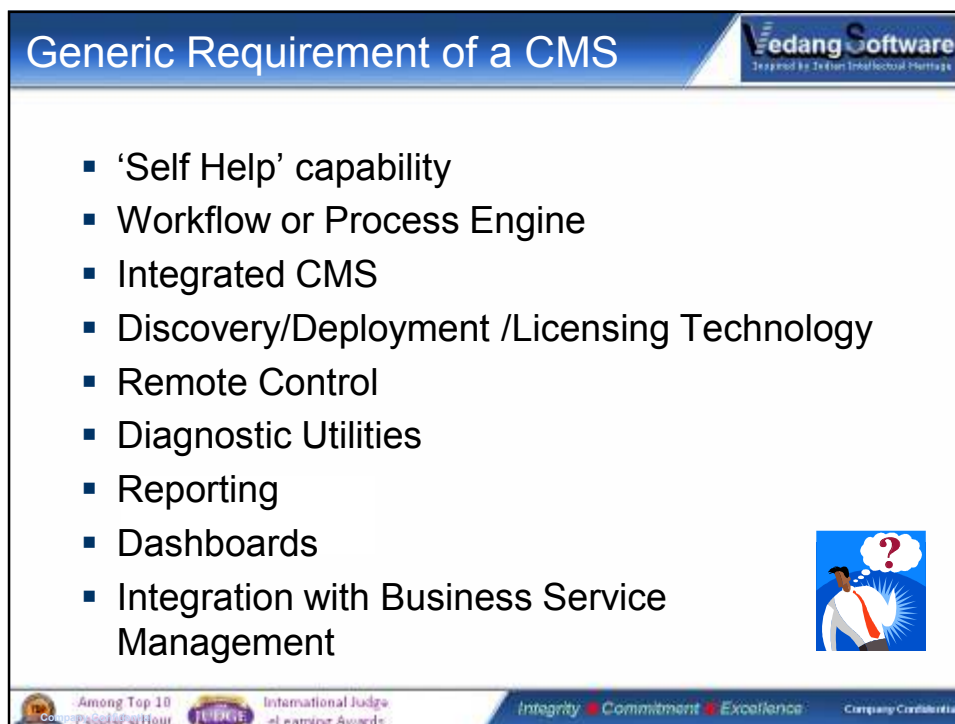
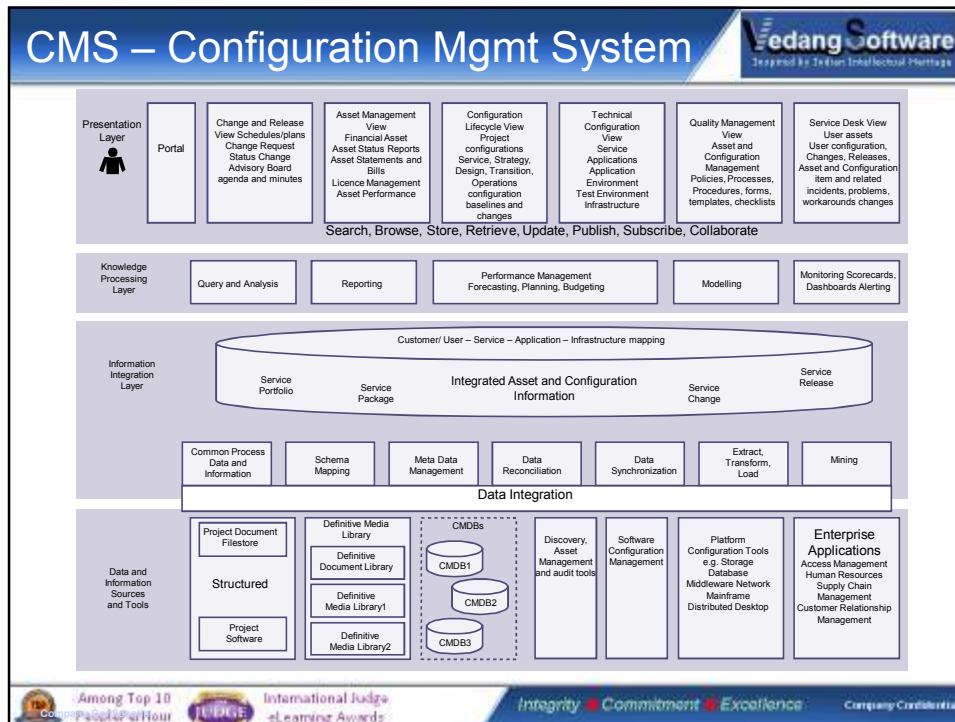















Definitive Media Library (DML)




- One or more locations in which the definitive and approved versions of all software Configuration Items are securely stored.
 - The DML may also contain associated CIs such as licenses and documentation.
 - The DML is a single logical storage area even if there are multiple locations.
- All SW in the DML is under the control of Change and Release Management and is recorded in the Configuration Management System.
- SW from the DML only is acceptable for use in a Release



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RDM - Goal




- **Release and Deployment Management**
 - Aims to build, test and deliver the capability to provide the services specified by Service Design that will accomplish the stakeholders' requirements and meet the intended objectives.
- **It's Goal**
 - is to deploy releases into production and establish effective use of the service in order to deliver value to the customer and be able to handover to service operations.

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RDM – Scope

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- The scope of Release and Deployment Management includes:
 - the processes, systems and functions to package, build, test and deploy a release into production and establish the service specified in the Service Design package before final handover to service operations.




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Release Unit


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- Components of an IT Service that are normally Released together. (Package)
- A Release Unit typically includes sufficient Components to perform a useful Function.
- For example one Release Unit could be a Desktop PC, including Hardware, Software, Licenses, Documentation etc.
- A different Release Unit may be the complete Payroll Application, including IT Operations Procedures and User training.



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RDM – Common Approaches







- Three Approaches
 - ‘Big bang’ vs phased
 - Push and pull
 - Automation vs manual
- Four Types
 - Full, Package, Delta, Emergency

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ELS –



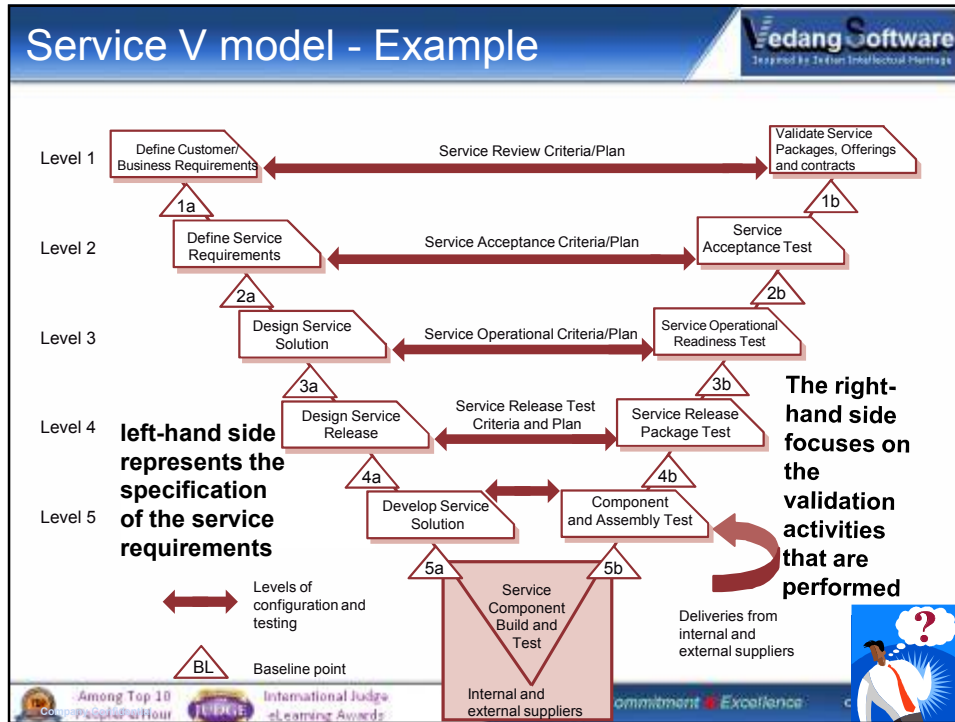
Provides resources for actual release



```


    graph TD
      Start([Start]) --> Operate[Operate Service]
      Operate --> Collect[Collect service performance data]
      Operate --> Incident[Incident and Problem Management]
      Operate --> Change[Change and Configuration Management]
      Collect --> Report[Report service performance achieved]
      Report --> Compare[Compare progress against ELS plan]
      Report --> SLM[Service Level Management]
      Report --> SKMS[(SKMS/CMS)]
      Compare --> Verify[Verify service stability]
      Verify --> Exit{Exit criteria met?}
      Exit -- No --> Identify[Identify quick wins/ improvements/risk mitigation/changes]
      Identify --> Plan[Plan and manage improvements/risk mitigation/change]
      Plan --> Operate
      Exit -- Yes --> End([End])
    
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Service Knowledge Management System (SKMS)

- 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.



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KM Hierarchy

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- DIKW
 - Wisdom can not be stored in a tool

Understanding ↑

Context →

Data

Information

Wisdom

Wisdom

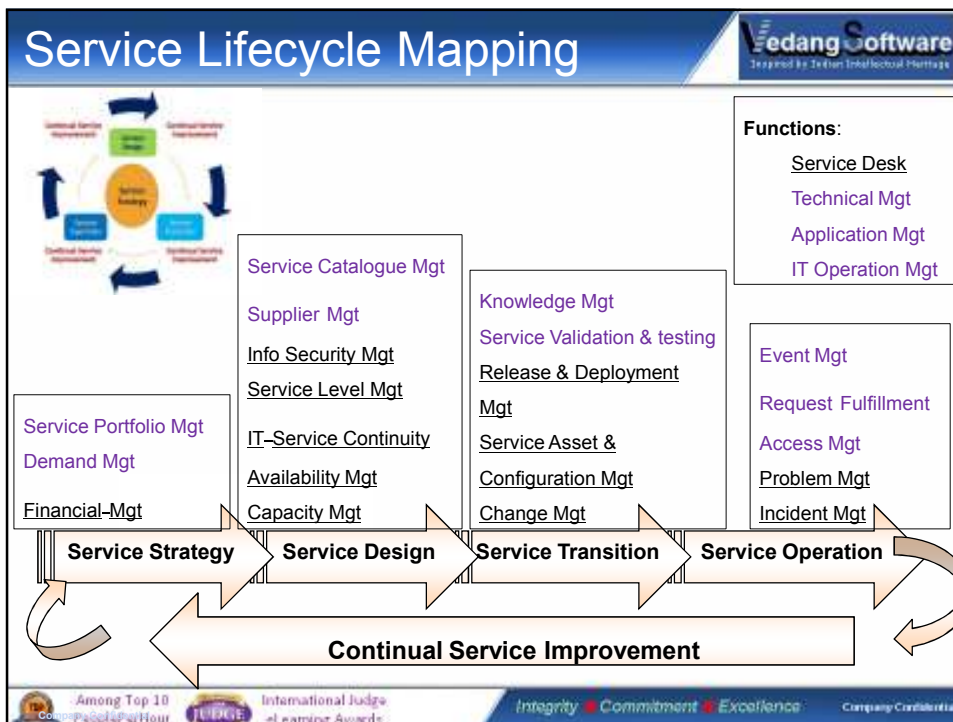
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Service Transition Processes

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- **Change Management**
- **Service Asset and Configuration Mgt**
- **Release and Deployment Mgt**
- **Service Validation and Testing**
- **Service Knowledge Mgt System**


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Goals & Objectives of SO

The purpose of Service Operation is to:

- Coordinate and carry out the activities
- Work on processes required to deliver and manage services at agreed levels
- Manage the technology that is used to deliver and support services.

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Business Value of SO


- Service value is modeled in Service Strategy
- The cost of the service is designed, predicted and Validated in Service Design and Service Transition
- Measures for optimization are identified in Continual Service Improvement
- **Service Operations is where the value is seen**

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Communications in SO




- Routine operational communication
- Communication between shifts
- Performance reporting
- Communication in projects
- Communication related to changes
- Communication related to exceptions
- Communication related to emergencies
- Training on new or customized processes and service design
- Communication of strategy and design to Service Operation teams.




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Functions in ITIL V3




ITIL v2 had only one function i.e. Service Desk, here we have four categories
TMF, AMF, ITOMF, SDF



Major SM Functions in ITIL V3




- **TMF – Technical Management Function**
 - Custodian of technical knowledge and expertise related to managing the IT
- **AMF – Application Management Function**
 - Custodian of technical knowledge and expertise related to managing applications
 - Overlaps with Application Development
- **ITOMF – IT Operations Management Function**
 - Responsible for the daily operational activities needed to manage the IT Infrastructure
 - Has IT Operations control & Facilities Management
 - Overlaps with TMF & AMF
- **SDF – Service Desk Function**
 - SPOC
 - Focuses on service restoration



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TMF & AMF



- **TMF - Custodian of technical knowledge** required to managing the IT infrastructure.
 - Provides actual resources to support the ITSM Lifecycle.
- **AMF - Custodian of technical knowledge** required to managing applications.
 - Application Management is to applications what Technical Management is to the IT Infrastructure.
 - Plays a role in all applications, whether purchased or developed in-house.
 - One of the key decisions : Build or Buy

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ITOMF

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- Responsible for the daily operational activities needed to manage the IT Infrastructure
- **IT Operations Control**
 - Ensures that routine operational tasks are carried out
 - Provides centralized monitoring and control activities
 - Uses an Operations Bridge or Network Operations Centre
- **Facilities Management**
 - Management of the physical IT environment (Data centers, computer rooms, etc)



Please note:

- In large Data Centers Technical and Application Management are co-located with IT Operations
- In some organizations many physical components of the IT Infrastructure are outsourced and Facilities Management may include the management of the outsourcing contracts

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SDF – Objectives


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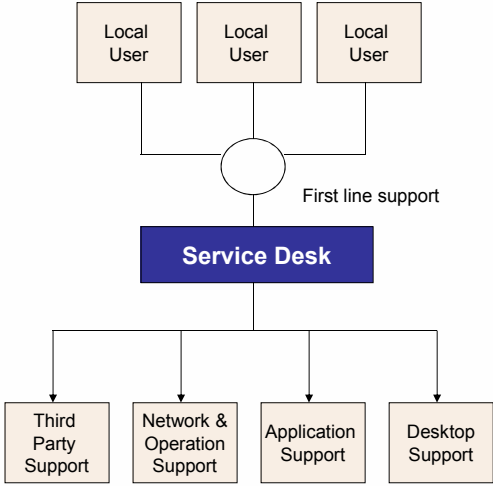
- Restore the 'normal service' to the users as quickly as possible
(In this context 'restoration of service' is meant in the widest possible sense)
- It is SPOC – Single point of contact
 - While this could involve fixing a technical fault, it could equally involve fulfilling a service request or answering a query or anything that is needed to allow the users to return to working satisfactorily


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Local Service Desk

- **For Local business needs and onsite support**
 - Desktop support
 - Network support
 - Application support
 - Systems and operations support
 - Third party support





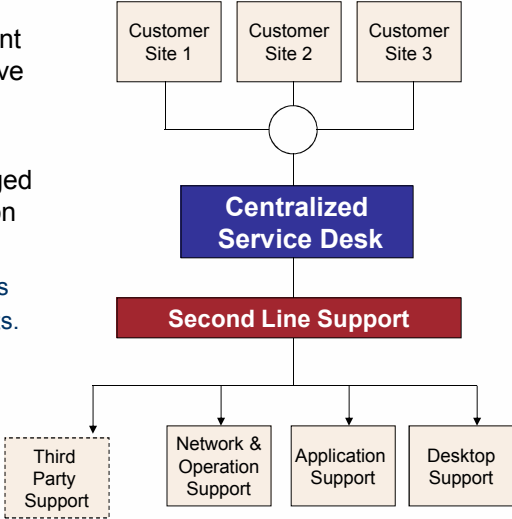



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Centralized Service Desk

- In multi location environment local SD becomes expensive
- Central SD is established serving all locations
- All service request are logged at a central physical location
- Key benefits
 - Reduced operational costs
 - Consolidated Mgmt reports.
 - Better resource allocation






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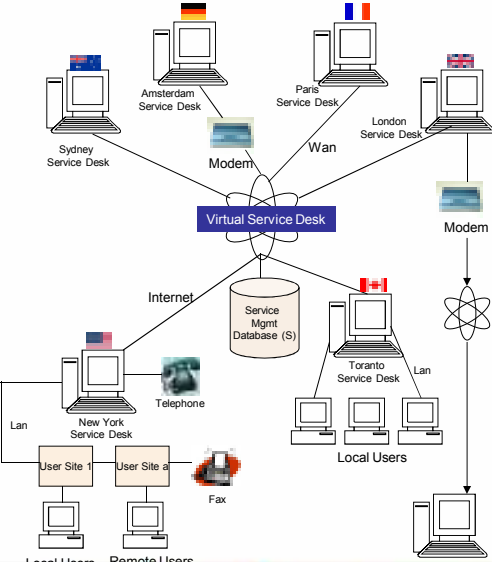
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Virtual Service Desk



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- Virtual service desk can be accessed from anywhere in the world
- If the organization is MNC it gives same benefits of centralized service desk
- Maintains central database accessible from all locations
- The only difficulty is the person required at Virtual SD needs to be specialist
Follow The Sun Model




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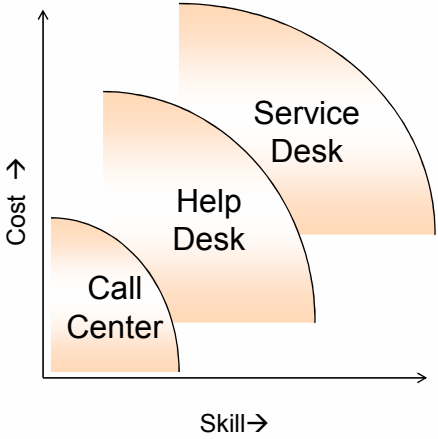
Third Party Supplier
Service Desk Company Confidential

SDF – Staffing Options



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- Technically Unskilled
- Technically Skilled
- Technically Experts
- Super User


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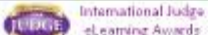
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SDF – Metrics




- Customer / User satisfaction (CSAT / USAT)
- Average handling time (AHT)
- Timely escalations and resolutions
- First call resolution (FCR)
- Time within which calls are answered.
- Call escalations as specified in SLA
- Restoration of service within acceptable time and in accordance with the SLA
- Timely information to users about current and future changes and errors.
- Conduct customer surveys to determine
 - Is the telephone answered courteously?
 - Are users given good advice to prevent incidents?

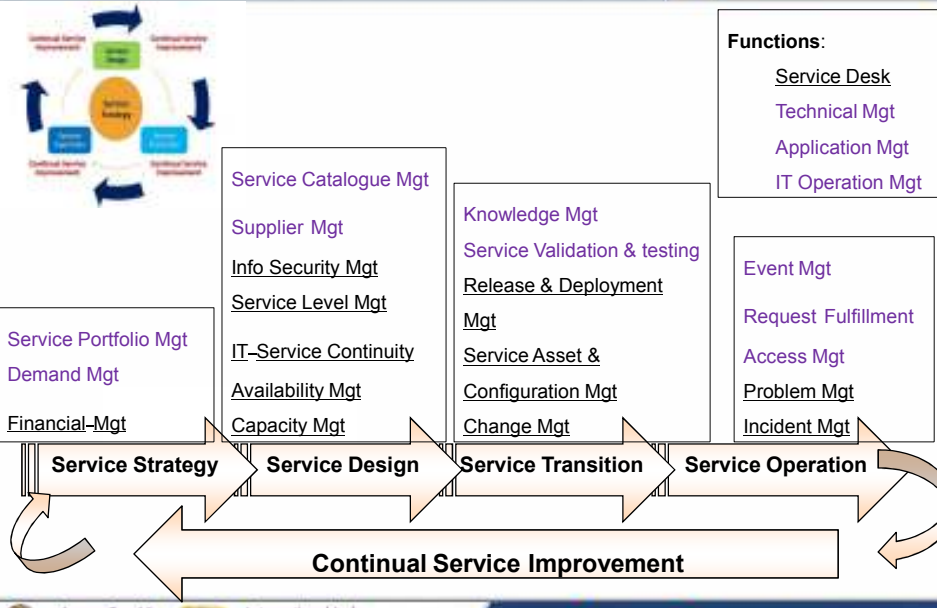







Service Lifecycle Mapping


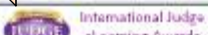






The diagram illustrates the Service Lifecycle Mapping process. It features a central circular flow of four stages: Service Strategy, Service Design, Service Transition, and Service Operation. Each stage is supported by a list of management functions. A large arrow at the bottom points from right to left, labeled 'Continual Service Improvement', indicating a feedback loop from the final stage back to the beginning.

Functions:


- Service Desk
- Technical Mgt
- Application Mgt
- IT Operation Mgt






Service Operation Processes



- **Event Management**
- **Incident Management**
- **Request Fulfillment**
- **Problem Management**
- **Access Management**




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EM - Scope, Goals & Objectives



- Provides the entry point for the execution of Service Operation processes and activities.
- Provides a way of comparing actual performance and behavior against design standards and SLAs.
- Provides a basis for Service Assurance and Reporting; and Service Improvement.



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EM – Basic Concepts

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- An event can be defined as any detectable or discernible occurrence
 - that has **significance** for the management of the IT Infrastructure or the delivery of IT service
- Please Note:
 - Events are typically notifications created by an IT service, Configuration Item (CI) or monitoring tool
 - Events that signify regular operation
 - Events that signify an exception
 - Events that signify unusual, but not exceptional, operation




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Alert

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- A warning that a **threshold** has been reached, something has changed, or a Failure has occurred.
- Alerts are often created and managed by System Management tools and are managed by the **Event Management Process**.




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IM - Scope, Goals & Objectives

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- **Objective:**
 - Restore normal service operation as quickly as possible and minimize the adverse impact on business operations, thus ensuring that the best possible levels of Service quality and availability are maintained.
- **Scope:**
 - Any event which disrupts, or which could disrupt, a service.
 - Events communicated directly by users/technical staff
 - Incident Management is the process for dealing with all incidents; this can include failures, questions or queries reported by the users (usually via a telephone call to the Service Desk), by technical staff, or automatically detected and reported by event monitoring tools.




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Incident

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- An unplanned interruption to an IT Service or a reduction in the Quality of an IT Service.
- Failure of a Configuration Item that has not yet impacted Service is also an Incident.



For example Failure of one disk from a mirror set.

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IM – Basic Concepts

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- 'Normal service operation' is defined here as service operation within SLA limits.

Major incidents

- A separate procedure, with shorter timescales and greater urgency, must be used for 'major' incidents.
- A definition of what constitutes a major incident must be agreed and ideally mapped on to the overall incident prioritization system
- They will be dealt with through the major incident process.




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IM – Important Concepts


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- Timescales
 - Must be agreed for all incident-handling (IH) stages
- Incident Model
 - Chronological order of the IH steps / Owner of actions / Timescales and thresholds for completion of the Actions
- Major incident
 - Procedure to be kept separate




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Impact, Urgency and Priority



Incident Model




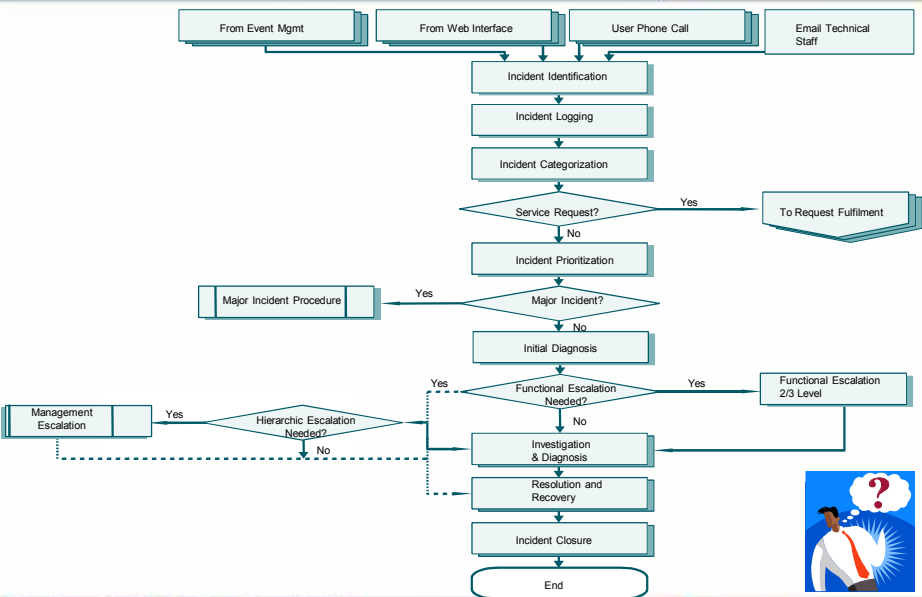
		Impact		
		High	Medium	Low
Urgency	High	critical -1 < 1 hour	high -2 < 8 hours	medium -3 < 24 hours
	Medium	high -2 < 8 hours	medium -3 < 24 hours	low -4 < 48 hours
	Low	medium -3 < 24 hours	low -4 < 48 hours	Planning/ planned

Priority = Impact X Urgency

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Incident Management - Process






```

    graph TD
      A[From Event Mgmt] --> B[From Web Interface]
      C[User Phone Call] --> B
      D[Email Technical Staff] --> B
      B --> E[Incident Identification]
      E --> F[Incident Logging]
      F --> G[Incident Categorization]
      G --> H{Service Request?}
      H -- Yes --> I[To Request Fulfillment]
      H -- No --> J[Incident Prioritization]
      J --> K{Major Incident?}
      K -- Yes --> L[Major Incident Procedure]
      K -- No --> M[Initial Diagnosis]
      M --> N{Functional Escalation Needed?}
      N -- Yes --> O[Functional Escalation 2/3 Level]
      N -- No --> P[Investigation & Diagnosis]
      O --> P
      P --> Q[Resolution and Recovery]
      Q --> R[Incident Closure]
      R --> S([End])
      T{Hierarchic Escalation Needed?} -- Yes --> U[Management Escalation]
      T -- No --> P
      U -.-> T
  
```



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IM – Challenges



- The ability to detect incidents as early as possible.
- Convincing all users that all incidents must be logged.
- Availability of information about problems and Known Errors.
- Integration into the CMS.
- Integration into the SLM process

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IM – KPIs




- Total numbers of Incidents
- Breakdown of incidents at each stage
- Size of current incident backlog
- Number and percentage of major incidents
- Mean elapsed time to achieve incident resolution or circumvention, broken down by impact code
- Percentage of incidents handled within agreed response time.

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RF - Scope, Goals & Objectives




- To provide a channel for users to request and receive standard services for which a pre-defined approval and qualification process exists
- To provide information to users and customers about the availability of services and the procedure for obtaining them
- To source and deliver the components of requested standard services (e.g. licenses and software media)
- To assist with general information, complaints or comments



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RF – Basic Concepts




- Service Requests will usually be satisfied by implementing a Standard Change
- The ownership of Service Requests resides with the Service Desk, which monitors, escalates, dispatches and often fulfils the user request.
- Pre-defined Request Models which typically include some form of pre-approval by Change Management

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Service Request




- A request from a User for information, or advice, or for a Standard Change or for Access to an IT Service.
- For example to reset a password, or to provide standard IT Services for a new User.
- Service Requests are usually handled by a Service Desk, and do not require an RFC to be submitted.



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PM - Scope, Goals & Objectives




- Goal & Objective
 - To prevent problems and resulting incidents from happening, to eliminate recurring incidents and to minimize the impact of incidents that cannot be prevented
- Scope:
 - Four Ps of service management

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Problem




- A cause of one or more Incidents.
- The cause is not usually known at the time a Problem Record is created, and the Problem Management Process is responsible for further investigation.




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Workaround




- Reducing or eliminating the Impact of an Incident or Problem for which a full Resolution is not yet available.
- For example by restarting a failed Configuration Item.
- Workarounds for Problems are documented in Known Error Records.
- Workarounds for Incidents that do not have associated Problem Records are documented in the Incident Record.




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Known Error




- A Problem that has a documented Root Cause and a Workaround.
- Known Errors are created and managed throughout their Lifecycle by Problem Management.
- Known Errors may also be identified by Development or Suppliers.




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Known Error Data Base (KEDB)




- A database containing all Known Error Records.
- This database is created by Problem Management and used by Incident and Problem Management.
- The Known Error Database is part of the Service Knowledge Management System.




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Access Management - Goal




- To provide authorized users the necessary rights to use a service or group of services
- Actual execution of policies and actions defined in Security and Availability Management




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Access Management – Basic Concepts



- **Access** : level and extent of a service’s functionality or data that a user is entitled to use
- **Identity** : distinguishing information about an individual which verifies their rank or status on the org-chart
 - (Every user **MUST** have a unique identity)
- **Rights or privileges**: set of services a user is permitted to use
 - (actual settings permitting access to a service or service group)
- **Services or service groups**: Services clubbed together into a group to facilitate access management according to functional relevance
- **Directory Services**: a tool or technology used to manage access and privileges



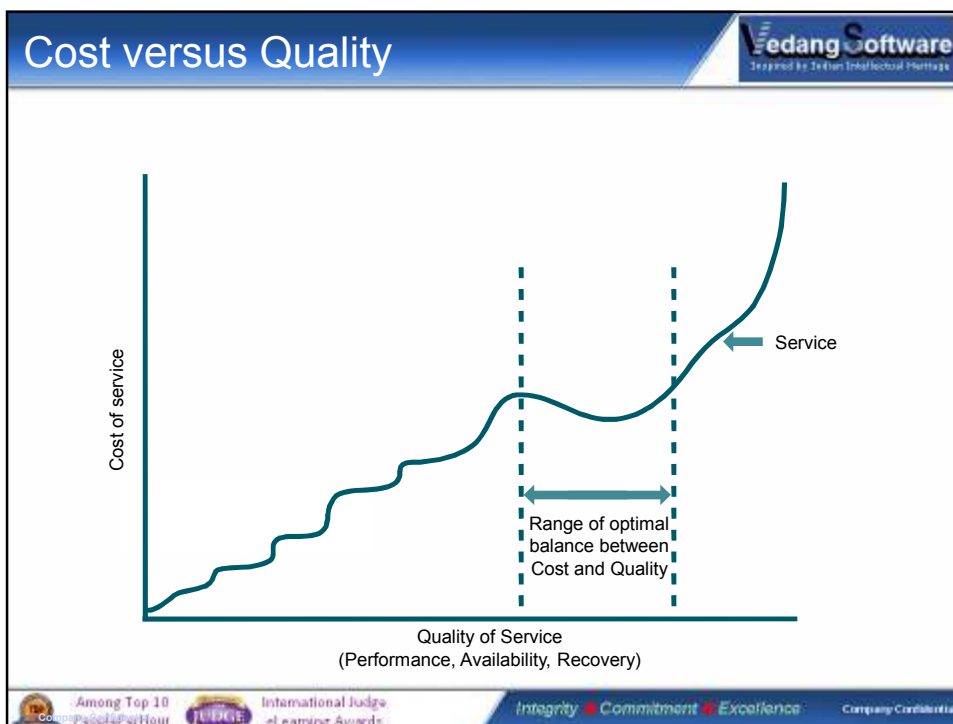
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Balances in Service Operation

- Internal versus external focus (IT Services versus Technology components)
- Stability versus Responsiveness
- Quality of Service versus Cost of Service
- Reactive versus Proactive

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CSI

7 Step Improvement Process

Measures that Mean Something
and Improvements that Work



Service Lifecycle Mapping



Functions:

- Service Desk
- Technical Mgt
- Application Mgt
- IT Operation Mgt

Service Portfolio Mgt

Demand Mgt

Financial-Mgt

Service Catalogue Mgt

Supplier Mgt

Info Security Mgt

Service Level Mgt

IT-Service Continuity

Availability Mgt

Capacity Mgt

Knowledge Mgt

Service Validation & testing

Release & Deployment

Mgt

Service Asset & Configuration Mgt

Change Mgt

Event Mgt

Request Fulfillment

Access Mgt

Problem Mgt

Incident Mgt

Service Strategy

Service Design

Service Transition

Service Operation

Continual Service Improvement


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Goal & Objectives of CSI




- The primary purpose of CSI is to continually align and realign IT services to the changing business needs by identifying and implementing improvements to IT services that support business processes
- Objectives:
 - Review, analyze and make recommendations on improvement opportunities
 - Service levels
 - Improve effectiveness and efficiency in delivering services by ensuring applicable quality practices are used




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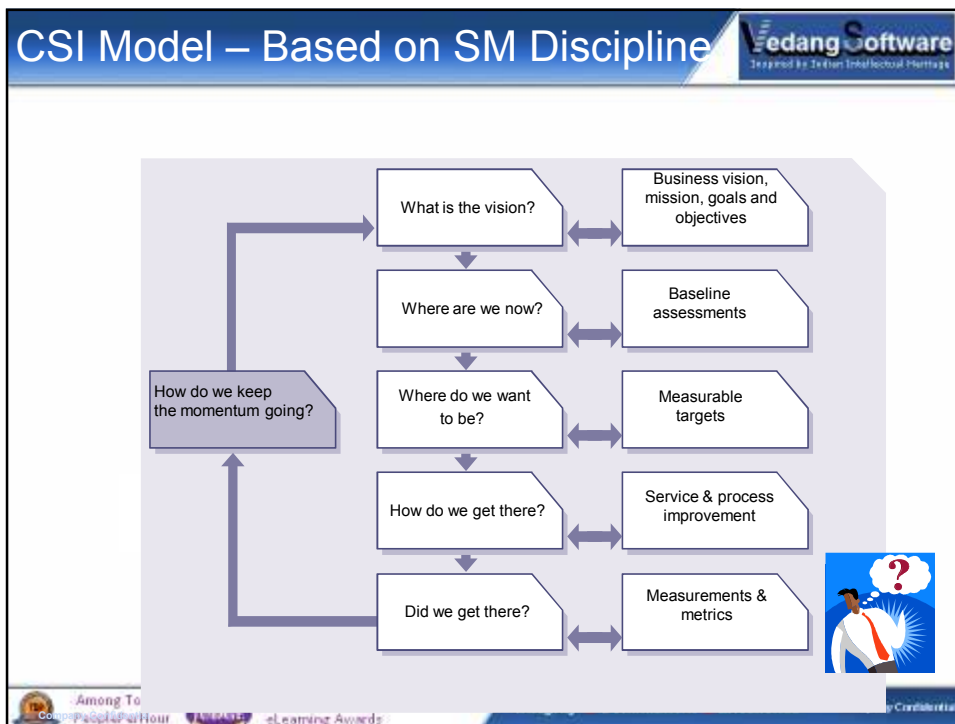
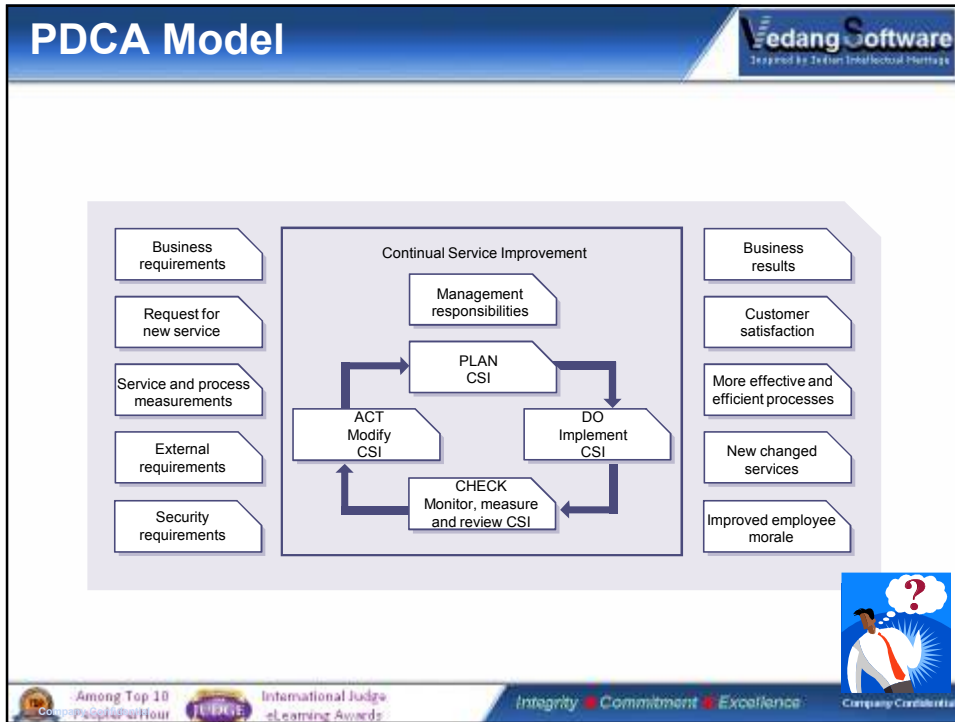
Business Value of CSI



- Increased organizational competency
- Integration between people and processes
- Reduction of redundancy increases business throughput
- Minimized lost opportunities
- Assured regulatory compliance that will minimize costs and reduce risk
- Ability to react to change rapidly.



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Measurement – Business value

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Why Measure ? – Purpose of reports

The diagram illustrates the purpose of reports within a measurement framework. At the center is an oval labeled "Your Measurement Framework". Four arrows radiate from this central oval to four distinct boxes representing different purposes:

- To Validate:** Represented by a target icon and the text "Strategy Vision".
- To Direct:** Represented by a hand pointing to a target icon and the text "Targets and Metrics".
- To Justify:** Represented by a person icon and the text "Factual Evidence".
- To Intervene:** Represented by a person icon and the text "Changes, Corrective Actions".

A small icon of a person with a question mark is located in the bottom right corner of the diagram area.

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Performance Baselines

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- Purpose:
 - Markers – Marking start point
 - **For later comparison (Important)**
 - Decision making – Does it need improvement ?
- Where to establish:
 - Strategic goals and objectives
 - Tactical process maturity
 - Operational metrics and KPIs



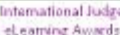
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Types of Metrics




- **Technology metrics**
 - Component & application performance , availability etc
- **Process metrics**
 - CSFs, KPIs and activity metrics for the service management processes
- **Service metrics**
 - These metrics are the results of the end-to-end service.
 - Component metrics are used to compute the service metrics.




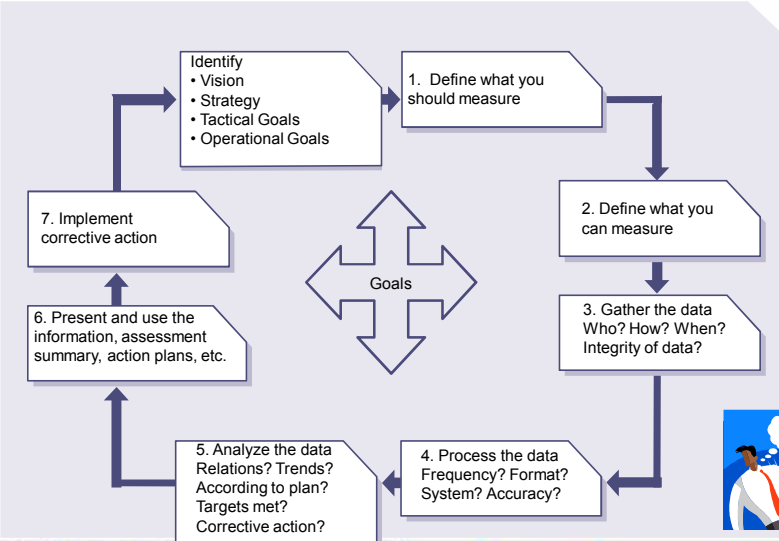








The 7 Step Improvement Process





```

    graph TD
      A[Identify  
• Vision  
• Strategy  
• Tactical Goals  
• Operational Goals] --> B[1. Define what you should measure]
      B --> C[2. Define what you can measure]
      C --> D[3. Gather the data  
Who? How? When?  
Integrity of data?]
      D --> E[4. Process the data  
Frequency? Format?  
System? Accuracy?]
      E --> F[5. Analyze the data  
Relations? Trends?  
According to plan?  
Targets met?  
Corrective action?]
      F --> G[6. Present and use the information, assessment summary, action plans, etc.]
      G --> H[7. Implement corrective action]
      H --> A
      A <--> I[Goals]
      I <--> B
      I <--> C
      I <--> D
      I <--> E
      I <--> F
      I <--> G
      I <--> H
      
```

