Charting the Course for IT Service Management

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EDUCAUSE Annual Conference 2017 | SEM09A  
Tuesday, October 31 | 8:00am - 11:30am ET | Meeting Room 108A, 100 Level
Agenda

• 8-8:20 am: Welcome! Logistics & Intros
• 8:20-8:40 am: What? ITSM 101 - A Brief Introduction
• 8:40-9:10 am: Why? Current States & Benchmarking
• 9:10-9:30 am: Who? Roles & Case Studies
• 9:30-9:50 am: BREAK
• 9:50-10:40 am: How? Processes & Case Studies
• 10:40-11:20 am: Now What? The IT Service Catalog, Change Management, & Holy Grails
• 11:20-11:30 am: Wrap-up
Welcome and Logistics

- Expectations for how we’ll work together in today’s workshop
- Note on the agenda timing
- Breaks
What our pre-con survey suggests...
What our pre-con survey suggests...
Introductions

1. Who you are (name, institution, role)
2. One thing you hope to get out of the day
What?
ITSM 101 - A Brief Introduction
ITSM or ITIL®?
Wrong Question!
Not an “Either/Or” Decision

- IT service management (ITSM) is what you do to manage the services you deliver to your customers, even if you don’t actually use that term.

- IT Infrastructure Library (ITIL®) is a best-practice framework for ITSM, and you should think about adopting some ideas from ITIL to help you work more effectively.
What does ITSM do?

Supports the shift to a more central and pivotal role for IT organizations:

- Continuously realign IT to business goals
- Streamline operations
- Increase transparency
- Standardize core processes and controls
- Provide a structure for continuous improvement
Foundational ITSM Assumptions

- IT provides services, not technologies
- The benefits of IT services are defined by the customer
- IT services are successful when they balance benefits, cost, and risk
- IT improvements support one another
- ITSM is an ongoing activity, not a timed project
ITIL Phases (Service Lifecycle)

- Service Strategy
- Service Design
- Service Transition
- Service Operations
- Continual Service Improvement (CSI)
ITIL Processes (at least some of the main ones)

- Service Catalog
- Incident Management
- Change Management*
- Request Fulfillment
- Problem Management
- Knowledge Management (KMDB)
- Asset & Configuration Management (CMDB)
- Project Management (ITIL references PMBOK)
- Service Portfolio
- Project Portfolio**
- Resource Portfolio**

* Both operational change & service change
** Somewhat outside of ITIL (more PMBOK & ERP), but related & critical components of service strategy, & often a part of ITSM tools
ITIL Processes (even more of them)

- Strategy Generation
- Demand Management
- Financial Management
- Service-Level Management
- Capacity Management
- Availability Management
- Service Continuity Management
- Information Security Management
- Supplier Management
- Transition Planning & Support
- Service Validation & Testing
- Release & Deployment Management
- Evaluation

- Event Management
- Access Management
- Service Measurement
- Service Reporting
- The 7-Step Continual Service Improvement Process
- Business Relationship Management
- Customer Relationship Management
- Etc.
ITIL Versions

- **ITIL (v1; 1989)**
  Central Computing & Telecommunications Agency (CCTA), a government agency in Great Britain

- **ITIL v2 (2001)**
  9 books; focus on support & delivery

- **ITIL 2007/v3**
  5 core publications (service lifecycle); focus on business value & feedback loops

- **ITIL 2011 (update; most current)**
  More processes and focus on strategy

*Note: None of this is that important, other than helping you understand what's most current.*
Do You Need an ITSM Approach?

Some Common Indicators

- A lack of awareness of IT’s service offerings, by both customers and providers
- Disjointed processes and platforms
- Duplicate services and lack of prioritization
- Overall operational inefficiencies
- An incomplete financial picture
- General disconnect between IT and business goals
The Atomic Level of ITSM
What are YOUR Motivations & Goals?
What our pre-con survey suggests...

Process Maturity

- Knowledge
- SACM
- Change
- Service Portfolio
- Service Catalog
- Request Fulfillment
- Incident
Why?
Assessing Your Current State & Benchmarking With Your Peers
Campus leaders use EDUCAUSE assessment and benchmarking services to plan for and manage IT service delivery, financials, security and risk, technology-supported learning, and digital initiatives.

**EDUCAUSE SERVICES**

**ASSESSMENT**
- **Learning Space Rating System**: Measure how classroom design supports and enables active learning
- **Information Security Program Assessment Tool**: Evaluate the maturity of your information security program
- **IT Risk Register**: Identify common risks to support your strategic IT risk-management program

**BENCHMARKING**
- **Technology Research in the Academic Community**: Track student and faculty technology needs and experiences
- **Core Data Service**: Compare peer and aspirant data for IT financials, staffing, and services
- **Benchmarking Service**: Measure technical and cultural capability for digital initiatives like student success

**ENHANCE DECISION MAKING | educause.edu/research**
Digital Capabilities for Higher Education

[Diagram showing various capabilities and their interconnections, such as Research, E-learning, Student success, Culture of innovation, Mission differentiating capabilities, IT governance, risk, and compliance, IT risk management, IT governance, IT workforce, IT agility, IT service management, Analytics, Information security, Foundational IT capabilities.]
Demonstrating Value Through IT Service Management

- Continuous realignment: IT to business goals
- Streamlined operations
- Increased transparency
- Core processes and controls
- Structure for continuous improvement

IT Service Management Maturity Index
(All Non-specialized US Institutions)

- Continual service improvement: 3.4
- Service operation: 3.8
- Service transition: 3.3
- Service design: 3.1
- Leadership: 3.6
- Strategy: 3.6

Composite: 3.5

2016 EDUCAUSE Core Data Service
<table>
<thead>
<tr>
<th>Service operation</th>
<th>Absent</th>
<th>Initial</th>
<th>Developing</th>
<th>Established</th>
<th>Optimized</th>
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<td>Coordinated resolution</td>
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<td>Easy access to services</td>
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<td>Service request optimization</td>
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<td>Strategy</td>
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<td>Services based on need</td>
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<td>Inst. input on IT strategic plan</td>
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<td>Cost-benefit of IT services</td>
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<td>Budget mapped to services</td>
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<td>Value understood throughout</td>
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| Continual service improvement      |        |         |            |             |           |
| Changes support business need      | 3.6    |         |            |             |           |
| Constituent needs gathered         | 3.5    |         |            |             |           |
| Regular assessments                | 3.1    |         |            |             |           |

| Service transition                 |        |         |            |             |           |
| Design with constituents           | 3.5    |         |            |             |           |
| Change management                  | 3.4    |         |            |             |           |
| Configuration items                | 3.3    |         |            |             |           |
| Organizational knowledge shared    | 3.0    |         |            |             |           |

| Service design                     |        |         |            |             |           |
| Defined services                   | 3.5    |         |            |             |           |
| Services available and accessible  | 3.5    |         |            |             |           |
| Assigned service owners            | 3.3    |         |            |             |           |
| Consistent delivery                | 3.1    |         |            |             |           |
| Services are understood            | 3.0    |         |            |             |           |
| Service catalog                    | 2.7    |         |            |             |           |
| Metrics and analytics              | 2.6    |         |            |             |           |
IT Service Management Maturity Index
(All Non-specialized US Institutions)

Continual service improvement: 3.4
Leadership: 3.6
Strategy: 3.6
Service design: 3.1
Service transition: 3.3
Service operation: 3.8

2016 EDUCAUSE Core Data Service
IT Service Management Maturity Index
(All Non-specialized US Institutions)

2016 EDUCAUSE Core Data Service
Strategy

- Aligned with goals: 4.0
- Services based on need: 4.0
- Inst. input on IT strategic plan: 3.8
- Cost-benefit of IT services: 3.5
- Budget mapped to services: 3.5
- Service prioritization: 3.4
- Value understood throughout: 3.2
IT Service Management Maturity Index
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Leadership: 3.6
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2016 EDUCAUSE Core Data Service
Leadership

- Committed support: 4.2
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2016 EDUCAUSE Core Data Service
Service Design

- Defined services: 3.5
- Services available and accessible: 3.5
- Assigned service owners: 3.3
- Consistent delivery: 3.1
- Services are understood: 3.0
- Service catalog: 2.7
- Metrics and analytics: 2.6
What our pre-con survey suggests...

Primary Challenges
- FTE's portfolios
- System
- Projects
- Students
- Struggle

Do Best
- Change
- Service
- Incident
- Do great
- Support
Discusion

Question 1: What obstacles are keeping your institution from moving forward with ITSM?

- Besides time or money, what can help overcome the obstacles?
Discussion

Question 2:
Where have you had success with ITSM?

▪ What were the keys to that success?
▪ What helped you get there?
Who?
Roles and Responsibilities
ITIL Roles

- **Service Owners (SOs)** – Service evolution/strategy
- **Service Managers (SMs)** – Service operations / Customer-facing
- **Service Engineers** – Technical design
- **Service Analysts** – Financial models/sustainability
- **Process Owners** – Enterprise-level
- **Process Managers** – Unit-level
- **Process Liaisons** – Subunit-level
- **Configuration Item Managers** – App managers, product owners, sys admins, etc. (responsible for granular technical pieces)
- **Portfolio Managers** – Business strategy & resource prioritization
- **Project Managers** (& Project Sponsors, Project Team Members, Program Managers/Sponsors, Stakeholders, SME’s, etc., all from PMBOK)
- **Business Relationship Managers** – “Translators” b/w IT service providers and customers
- **Customer Relationship Managers** – Customer satisfaction/retention
Service Roles and Lifecycle

- (Business) Service Owner – SO
  - Service Strategy – SS
  - Service Design – SD

- Service (Offering) Manager – SM
  - Service Transition – ST
  - Service Operation – SO
  - Continual Service Improvement – CSI
ITIL Artifacts

- Change Calendar
- Service Catalog
- SLAs (Service-Level Agreements)
- **SDPs** (Service Design Packages) & **SDCPs** (Service Design Change Packages)
- **RFCs** (Requests For Change)
- KMDB (Knowledge Management Database)
- CMDB (Configuration Management Database)
- Service Portfolio
- Project Portfolio
- Resource Portfolio
- Service Satisfaction Surveys
- ITSM Workflow Tools (archival records—incidents, changes, growth, etc.)
Putting It All Together

Service Lifecycle: **Strategy**, **Design**, **Transition**, **Operations**, & **Continuous Improvement**
Context Switching & Perspective

- In front of the curtain or behind the curtain ("Information" vs. "Technology")
- Which process (IM, CM, SRF, SC, SP, PP, RP, PM, KM, A&CM, PM?)
- Customer type ("customer," consumer/end-user, provider, coordinator, etc.)
- Process vs. role
- Which ‘P’ (Process, Project, Program, Portfolio, Problem, Policy, Procedures, …)
- ITSM/ITIL purist terminology vs. tool (e.g., ServiceNow) terminology
- Etc.
BREAK (20 minutes)
How?
Processes & Case Studies
Case Study:
Miami University and Kotter’s 8 Steps
Kotter’s 8 Step Model

1. Establish a Sense of Urgency
2. Create the Guiding Coalition
3. Develop a Vision and Strategy
4. Communicate the Change Vision
5. Empower Employees for Action
6. Generate Short-Term Wins
7. Consolidate Gains
8. Anchor in the Culture

Creating the climate for change
Engaging and enabling the organization
Sustaining change
Service Lifecycle & Kotter

Continual Improvement

Strategy
1: Establish Urgency
2: Create Guiding Coalition

Design
3: Develop a Vision
4: Communicate the Vision

Transition
5: Empower Employees to Act

Operate
6: Short Term Wins
7: Consolidate Gains
8: Anchor in The Culture
1. Establishing a Sense of Urgency

- Data-driven Vice President announces “Year of Service Excellence”
- Replacement and retirement of tools
- Deployment dates set up front in release plan
- Desire to avoid future budget cuts
“A fool with a tool is still a fool.”
- Grady Booch

At the end of the day, this project is about the processes and the necessary:
• changes in individual behaviors to participate and
• changes in organization culture to support them

It’s not about the tool.
2. Creating the Guiding Coalition

- Cross-functional release teams
  - Kick-off session
  - Half-day, dedicated teams
  - Liaisons to their colleagues
- Detailed stakeholder analysis
- Team execution of communication plan
- Invest in ITIL Expert certifications
3. Developing a Vision and Strategy

- **Day-Long Launch Event**
  - Key Note: Dennis Snow -- **Lens of the Customer**

- **Strategy** package with sign-off for each process
  - nominate a process owner
  - define objectives/desired business outcomes
  - define critical success factors
  - define and analyze stakeholders
  - conduct maturity baseline
  - high level current state
  - high level target state

- **Incorporate best-practice (not common practice) wisdom**
4. **Communicating the Change Vision**

- **Design package with sign-off for each process**
  - perform in-depth current state analysis
  - define key performance indicators
  - define process policies
  - define future state process diagram and RACI chart
  - define acceptance criteria
  - articulate prioritized requirements (stories)

- **Demos & Focus Groups (Iterative)**
Design Package & Deming Cycle

Current State
- Plan
- Act
- Do
- Check

Target State
- Plan
- Act
- Do
- Check

Process Owners

Key Performance Indicators

Release

Time

Improvement
During Release

- Face-to-Face Training
  - incorporate best practice concepts
  - outline new behaviours and expectations
  - provide common vocabulary
- Cross-functional teams doing the work of process engineering

Ongoing

- Face-to-Face training of new staff
- Best practice training for process owners
- Continual Improvement Registry
6. Generating Short-Term Wins

- Reliability and ease of use of new tool
- Communicating praises
- Use of the data
- Growth of service request models
- Visibility by clients into their IT interactions
- Defining new services for the catalog
1. Continual Improvement registry -- improvement bundles
2. Bi-weekly process manager meetings
3. Process scorecards
4. Weekly continuous improvement time for process owners
5. Weekly metrics time for process owners
6. Weekly inspection/audit time for process owners
Process Managers:
Anchor performance

Process Owners:
Set New Targets

Deployed Processes - Deming Cycle
Embracing Transparency
- Overheard: “Oh, I should start creating tickets for that”
- Fewer “operational issues” interfering with project work

Adopting Standards
- Clarity of role (process owner, process manager, process practitioners)
- Creation of “standard changes”
- Applying proper process to match the characteristics of a unit of work
- Transition of work to operational staff

Measuring Results
- Incorporating into performance review discussions
- Setting targets

Process Integration
- Outputs from one process serving as inputs to another
Owners as Change Agents

Credit to John Clarke: Microsoft’s US IT Service Management Architect
Successes, Failures, & Lessons Learned

- Iterative, inclusive creation of strategy and design packages garnered trust and conviction from IT staff involved during execution.
- Opt-out by distributed IT delayed full optimization.
- Executive support freed up resources to avoid shortcuts and work the communication plan week to week.
- Give tools to Service Owners to be fully accountable for End-to-End delivery (not just component delivery).
Successes, Failures, & Lessons Learned

- Process first (really strategy first) provided focus on shared pain points
- Project management and not release management...
- Acceptance Criteria clearly defined the starting line for ongoing, incremental improvement
- Prioritized Importance of SACM for Change instead of Incident
Case Study:
The Pennsylvania State University and “One IT”
IT Transformation Program

- **Goal**
  - Adopt shared service management processes across IT at Penn State to improve efficiency and effectiveness

- **Participating Units**
  - Outreach Pilot
  - Information Technology Services (ITS) Early Adopter
  - Smeal College of Business Early Adopter
  - Penn State Harrisburg Early Adopter
  - Penn State York Early Adopter

- **Planning Team**
  - Eight-person team of project managers, coordinators, and a technical writer
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<thead>
<tr>
<th>Service Strategy</th>
<th>Service Portfolio Management</th>
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<td>Incident Management</td>
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<td>Service Request Fulfillment</td>
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<td>Problem Management</td>
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IT Transformation Program

- **Federated Governance**
  - Multi-unit Steering Committee
  - Unit-level Committees
  - Oversees SMO Activities and the Service Management Program Plan

- **Service Management Office (SMO)**
  - Facilitation, Not Decisions
  - Policy and Process “Owners”
  - Facilitates New Subscriber Onboarding
  - Facilitates Training
  - Handles Communications
  - Curates Documentation
  - Houses Core Dev/Ops Staff
Shared Policies
Define high-level guidelines

5 Incident Management Policy

This section defines classification rules/guidelines for the process.

This plan provides a foundation for managing the following categories of incident management policies:

Activities
- All in-scope activity will follow the process defined by this document and be recorded in the IT shared service management system. It does NOT commit to providing any level of service for issues outside of the process and system.

Incidents
- Incidents, problems, requests, and changes will be linked when appropriate. Parents cannot be closed without the children being closed.
- Incidents will be associated to a user/reqester through integration of the shared service management system and directory services.
- Incidents will be associated with a configuration item through integration with a federated configuration management data base.
- Incidents will be addressed in order of priority then in order of date/time due. Priority will be based on impact and urgency with associated service levels.
- An incident will only be closed if a work around is provided, it is resolved, a change is successfully implemented, or the user cancels the incident.
- Very Important Person (VIP) related incidents including deans, provosts, and presidents will be elevated to high priority.
6 Incident Management Process Flow

This section defines inputs, activities, decisions, and outputs for the process.
Shared Procedures

Establish common standards

- **Individual that identifies incident as major:** Contact the Incident Manager.
- **Incident Manager:** Assess the incident.
- **Incident Manager:** Produce alert.
- **Incident Manager:** Convene appropriate major incident response team including a technical team, technical lead, authority lead, and communications coordinator.
- **Major Incident Response Team:** Postpone any project or lower priority events, requests, incidents, problems, changes, and projects until the major incident is resolved.
- **Incident Manager:** Communicate with IT management, customers, and users and provide status updates if appropriate. In the event an emergency change request is needed, the Incident manager will communicate with the Change Manager and Emergency Change Advisory Board.
- **Incident Manager:** Confirm with customers/users are satisfied with the resolution. Perform and document post incident review on all major incidents. Remove alert.
<table>
<thead>
<tr>
<th>Process Activity</th>
<th>Owner and Procedure</th>
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<tbody>
<tr>
<td>Web, Chat, Email, Phone, Walk-in, Event</td>
<td>TBD – Outreach, ITS, Smeal, Harrisburg, and York procedure workshops.</td>
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<tr>
<td>User contacts level 1 virtual service desk</td>
<td>TBD – Outreach, ITS, Smeal, Harrisburg, and York procedure workshops.</td>
</tr>
<tr>
<td>Level 1 record, categorize, prioritize, and link incident and notification sent</td>
<td>TBD – Outreach, ITS, Smeal, Harrisburg, and York procedure workshops.</td>
</tr>
</tbody>
</table>
| Incident Mgr. coordinates major incident | **Individual that identifies incident as major**: Contact the Incident Manager.  
**Incident Manager**: Assess the incident.  
**Incident Manager**: Produce alert. |
Roles and Responsibilities

Process Owner

What is this role?
Process owners act as the authority on a process, ensuring that the process supports the University’s mission of teaching, research, and service. Process owners promote the value of the process as part of the Service Management Program and work with the Service Management Office to continually monitor process health and maturity.

General Responsibilities
- Act as point of contact for a process
- Act as the authority for a process at the university level
- Coordinate a process across the University
- Champion policies, processes, roles, and responsibilities across the university
- Maintain shared policy, process, and procedure documentation
- Monitor key performance indicators (KPIs) and critical success factors (CSFs)
- Facilitate quarterly process reviews
- Facilitate annual process audits
- Ensure continual process improvement
- Take corrective action when needed

Applicable Processes
- Incident Management
- Change Management
- Request Fulfillment
- Service Catalog Management
- Knowledge Management
- Problem Management

Service Manager

What is this role?
A service manager has overall accountability for defining the service, ensuring services meet the business needs of the University and are delivered in accordance with agreed business requirements. Service managers are also responsible for managing the service lifecycle—often in conjunction with a service team.

General Responsibilities
- Manage the delivery and lifecycle of services for business strategy development
- Provide accountability for service transition and operation
- Conduct competitive market assessment/benchmarking
- Analyze financial and internal customer analysis
- Provide accountability for the documentation and deployment of quality service offerings
- Ensure continual service improvement including facilitating quarterly service reviews and annual service audits
- Oversee internal supplier management
- Manage the cost of services
- Manage vendor relations
- Manage inventory related to the service
- Respond to major incidents
- Approve change requests

Applicable Processes
- Incident Management
- Change Management
- Request Fulfillment
- Service Catalog Management
- Knowledge Management
- Problem Management
- Service Portfolio Management
- Project Portfolio Management

Penn State’s Service Management Office
www.psu.edu
(814) 867.0100
Transition

Repeating Streams

Shared Policies, Processes and Procedures Workshops

Stream 1
- Unit Procedure Creation
- Tool Configuration
- System Testing
- Staff Training
- Go Live

2
3
4
5
5 Streams per Unit

Stream 1
- Incident Management
- Change Management

Stream 2
- Service Request Fulfillment
- Service Catalog

Stream 3
- Service Portfolio
- Project Portfolio
- Resource Portfolio

Stream 4
- Problem Management
- Knowledge Management

Stream 5
- Asset and Configuration Management
- Project Management
Successes, Failures, & Lessons Learned

- Get executive sponsorship, which greatly increases your chances for success.
- Get plenty of your folks trained in ITSM/ITIL and consider hiring an ITSM consultant to help you define your goals/requirements and procure an enterprise ITSM tool.
- Start with the service catalog and Service Catalog Management process.
- Utilize the ECAR Higher Ed IT Service Catalog Model: [https://library.educause.edu/resources/2015/4/the-higher-education-it-service-catalog-a-working-model-for-comparison-and-collaboration](https://library.educause.edu/resources/2015/4/the-higher-education-it-service-catalog-a-working-model-for-comparison-and-collaboration)
Successes, Failures, & Lessons Learned

- Assign process and service stewardship roles (process owners, service managers, etc.)
- Don’t let politics get in the way of service ownership.
- Form a Service Management Office (SMO) to provide operational support to all ITSM subscribers.
- SMO should provide federated governance (facilitate vs. dictate decisions).
- Don’t stop short of the holy grails (more on that below).
Discussion: Organizational Change and Buy-in

Vision + Skills + Incentive + Resources + Action Plan = Productive Change

Skills + Incentive + Resources + Action Plan = Confusion

Vision + Incentive + Resources + Action Plan = Anxiety

Vision + Skills + Resources + Action Plan = Limited Change

Vision + Skills + Incentive + Action Plan = Frustration

Vision + Skills + Incentive + Resources = False Start
Discussion: Organizational Change and Buy-in

Stakeholder Analysis and Communication Plan
Now What?
- Service Catalog
- Change Management
- Holy Grails
What is a service?

“What Delivering value to customers by facilitating outcomes customers want to achieve without the ownership of specific costs and risks”
The IT Service Catalog

- A part of ITSM
- A part of the service portfolio

“It is a vehicle used to communicate and provide clarity to constituents about the IT services that are available to them, to help improve customer relations by sharing information and setting expectations, and to improve service portfolio planning”

-The Higher Ed IT Service Catalog: A Working Model for Comparison and Collaboration
Service Hierarchies

Service Portfolio

Service Pipeline

Service Catalog

Retired Services

Service Category

Service (Including Related Attributes)

Service Offering (Including Related Attributes)

Service Category

Service

Service Offering

Service

Service Offering
Service Categories

- Administrative and Business
- Communication and Collaboration
- End-Point Computing
- Infrastructure
- IT Professional Services
- Research
- Security
- Teaching and Learning

Services
- Application Development
- Consulting/Advising
- Continuity/Disaster Recovery
- Enterprise Licensing
- IT Service Management
- Portfolio/Project Management
- Training
How Service Requests Relate to Services

- The Higher Ed IT Service Catalog:
  A Working Model for Comparison and Collaboration
Many Types of IT Services

Business Process 1

Business Process 2

Customer-facing Services

Service A (Enhancing)

Service B (Enabling)

Service C (Core)

Supporting Services

Service a

Service b

Service c

Service d

Service e

Service D (Core)

Offering

Offering

Offering

Offering

Offering
Multiple Views: Business and Technical

Business View

Business Process 1

Customer-facing Services

Service A

Supporting Services

Service a

IT Service

Configuration Management System

Business Process 2

Service B

Service C

Service D

Service B

Service C

Service D

Business Process 2

Service a

Service b

Service c

Service d

Service e
Multiple Views: Wholesale and Retail

[Diagram showing multiple views with Business Process 1, Business Process 2, and supporting services]
Next Steps

▪ Establish the service owner role and assign an owner to each service
▪ Integrate service portfolio governance into project portfolio governance
▪ Develop a formal service portfolio governance process to make decisions about services offered, what services should be changed, and retiring services
Change Management
Three Contexts of “Change Management”

1. Organizational
   Culture, structure, leadership, etc.

2. Service (evolution)
   Service design, feature changes, wholly new services, etc.

3. Operational
   “Reboots,” upgrades, updates, service outages in general, etc.
Service Change Management

- RFC (Request For Change)
- ITSSC (IT Services Steering Committee)
- SDCP (Service Design Change Package)
- SDP (Service Design Package)

Service Lifecycle: **Strategy, Design, Transition, Operations, & Continuous Improvement**
Operational Change Management

- Change calendar
  - Collision avoidance
  - Incident forensics
- CAB (Change Advisory Board)
Holy Grails

1. Managing the Nuts & Bolts
2. Prioritization & Strategy
The ITSM Process Continuum
• Questions?
• What steps will you take?
• Robert Black, Assistant Director, IT Process and Planning, Miami University, blackrw@miamioh.edu

• Mark Katsouros, Director, Service Design & Development, The Pennsylvania State University, mark1@psu.edu, @katsouros

• Leah Lang, Director of Analytics Services, EDUCAUSE, llang@educause.edu

• Karen Wetzel, Senior Manager, ECAR Working Groups, EDUCAUSE kwetzel@educause.edu, @eduwetzel

Wednesday, November 1
10:30-12 • Meeting Room 203A
Communications Infrastructure and Applications CG (Mark)

12:30-1:15 • Community Central
Meet and Mingle: Engaging in the EDUCAUSE Community (Karen)

2-2:45 • Community Central
Meet and Mingle: Data, Research, Analytics (Leah)

Thursday, November 2
1:30-2:20 • Meeting Room 203A
ITSM CG (Bob)
Resources

EDUCAUSE ITSM Constituent Group
https://www.educause.edu/discuss/it-service-management-itsm-constituent-group

IT Service Metrics 101
https://er.educause.edu/articles/2013/1/it-service-metrics-101

The Unified IT Service Catalog: Your One-Stop Shop
https://er.educause.edu/articles/2014/8/the-unified-it-service-catalog-your-onestop-shop

The Higher Education IT Service Catalog: A Working Model for Comparison and Collaboration
https://library.educause.edu/resources/2015/4/the-higher-education-it-service-catalog-a-working-model-for-comparison-and-collaboration

Demonstrating Value Through IT Service Management in Higher Education
Resources

EDUCAUSE Benchmarking
https://www.educause.edu/benchmarking

Workshop Examples, Handouts, Templates, Appendices
https://drive.google.com/drive/folders/0B-ASd XK6w6XHQmgzTEoxTWtnOUE?usp=sharing

Glossary of ITIL Terms
https://www.axelos.com/glossaries-of-terms
Recommended Reading

Leading Change
by John P. Kotter

Who Moved My Cheese?: An A-Mazing Way to Deal with Change in Your Work and in Your Life
by Spencer Johnson

That's Not How We Do It Here!: A Story about How Organizations Rise and Fall--and Can Rise Again
by John Kotter, Holger Rathgeber

Leading Change from the Middle: A Practical Guide to Building Extraordinary Capabilities
by Jackson Nickerson