

# servicetalk

The Journal of the it Service Management Forum

June Theme Articles

## Business Continuity Management

2 articles explore the ins and outs...

### IT Physician Heal Thyself

Final article in this  
fascinating series

### Making the Leap

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Operational Use

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June 2004  
Issue No. 67

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## Chief Executive Officer's Remarks

While we still have to await the final audited accounts, preliminary results show yet another successful year for the *itSMF*. Overall turnover is up about 25% in a year where we offered increased discounts on publications, held seminar prices unchanged for the seventh straight year and made only minimal increments in conference prices, showing that it was true incremental growth and not just price inflation. There was also a healthy surplus generated, though some of this money has already been earmarked for activities such as translations of core ITIL material, the ROI study and an externally assisted strategic review.



The review has been commissioned by the board to enable a suitable strategy for the future direction of the organisation to be developed. A number of members have been contacted by the consultants, staff input has been sought and the board will be participating in a workshop, to ensure that as many views as possible are fed into the decision-making process. It is very heartening to be able to embark on this activity with a strong financial footing and an exciting future in prospect.

As always, the decisions reached will be communicated to all members.

*itSMF* was once again strongly represented at the Help Desk & IT Support Show, both at our stand which was exceedingly busy throughout and in the seminar programmes to which we contributed. The HDI-commissioned report on the "ITIL Experience" was launched at the event and a review appears elsewhere in the magazine.

Planning for conference is well advanced and there are some exciting seminars in development. But if you have any suggestions for events or other activities, please contact the office.

### What is the *itSMF*?

The IT Service Management Forum Ltd. (*itSMF*) is the only internationally recognised and independent organisation dedicated to IT Service Management. It is a not-for-profit organisation, wholly owned and principally operated by its membership. The *itSMF* is a major influence on, and contributor to, Industry 'Best Practice' and Standards worldwide, working in partnership with the OGC (the UK Government advisory body), the British Standards Institution (BSI), the Distributed Management Task Force (DMTF), the Information Systems Examination Board (ISEB) and the Examination Institute of the Netherlands (EXIN).

### The aims of the *itSMF*

- To develop and promote industry best practice in service management
- To engender professionalism within service management personnel
- To provide a vehicle for helping members improve service performance
- To provide members with a relevant forum in which to exchange information and share experiences with their peers on both sides of the industry

### What services do we offer?

Among the services we offer are:

- opportunity to participate in setting best practice;
- reduced entry to seminars/exhibitions;
- discounts on book sales;
- products/services catalogues;
- consultancy;
- regional discussion groups;
- reference sites.

### *itSMF* officers and staff

Chairman – Mark Hall; Vice Chairman – Ken Goff; Treasurer – Mary Fishleigh;  
 Chief Executive Officer – Aidan Lawes; Events Manager – Maxine McMahon;  
 Membership Services Manager – John McDermott; Marketing Manager – Kim May;  
 Membership Administrator – Michelle Darby; Project Manager – Chris Lang;  
 Book Sales – Sharon Shaw; Book-keeper – Sarah Nieto

# Protecting Information and Business Value

**Terence Murphy**  
*Information Solutions Consulting*

## Introduction

Most views of IT best practice tell us that the Information a business holds must have some value to it and that even the very best technology can only succeed when deployed in a properly planned and designed organisation. Justifying the cost of technology and its supporting organisation is all too often limited by taking a project view of the cost rather than the corporate need for information protection. Taking the point in time view, rather than the lifecycle view, of the value contained in the information will distort the protection requirement.

This outline follows these themes through recent engagements with a discussion around what Business Value of Information has come to mean, how practices in Storage Management have evolved to deal with information issues, the nature of Information Protection and what happens after information and its Business Value has been protected.

## Business Value

It has not been commonplace for a Business Value to be quoted for a specific piece of information or even an application in many cases. In these engagements assessing Information's Business Value has considered balancing three aspects:

- Finance,
- Risk
- Business Strategy

For Finance this should entail examination of revenue as a dependency of the availability and accuracy of a given information entity and the cost of hosting it (including protection). This typically is too difficult so the application as a whole sets the value. Risk can be lifted from the corporate Business Continuity Management

(BCM) measures. In the absence of this any Information Risk model will do. In a few cases the first Risk to be considered centred on a lack of corporate Business Continuity vision. Without a Board Level Sponsor, funding for creating a typical unbreakable information infrastructure is difficult to find. Strategic values will be related to Mission statements and the various Objectives associated with the leadership's direction for the business. Shareholder value will be embedded in all of these measures. The end result should be a ranking value, not necessarily a monetary figure. An appropriate hierarchy of protection services can then be matched to the rankings.

## Information

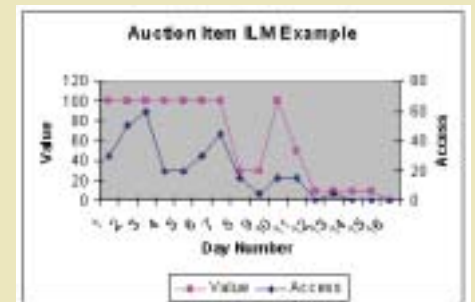
The challenge generally lies in how to associate and apportion the various values with the Information entities stored. Some distinction is appropriate here about nomenclature: in this paper the term information includes all digital assets stored on an IT system but in this instance data, which is a representation of business transactions and databases, has to be separated from information which is aggregated such as analysed data, worksheets, documents, diagrams etc. Another image of this would be around data being used at the business functional level perhaps through a terminal and information being used at the professional, managerial and executive level through a PC of some sort.

Evaluation needs to be considered at two or three levels:

- what is the value of the application (or usage) that the entity belongs to
- what is the value of the entity
- what is the value of a data item within the entity. This is unlikely for decision making information.

All of these will vary over time at

differing rates as a result of a variety of influences. Understanding this and using the knowledge to exploit the available storage infrastructure is Information Lifecycle Management (ILM). Effective and efficient protection is very much dependent on the ILM reflecting the transition of an Information entity's value in the service applied to it. At the application and file level ILM can be deployed through Storage Management to drive the level of protection required. However at the data level there are sensitivities, considerations and tooling issues best resolved by Database Design and Administration.



The assembled view of the values needs to be comparable so that, for instance, equitable judgements can be made between a revenue figure and a reputation risk. Calculation needs to be tempered by a strategic view to ensure a balanced and universally beneficial result.

A current view of a business as having customers and suppliers externally and with staff, materials and assets internally means that information flow at one end is largely similar to the information flow at the other end. The key aspect is that information is integral to the business, an obvious IT mapping would show CRM at the top, ERP in the middle and SCM at the bottom. There are businesses, for instance internet auction sites or airline global reservation systems that consist almost entirely of information. For these businesses the essential nature of

protection is fundamental to day to day survival. Many other businesses move closer to this model as services and distribution become the normal mode of commercial operation. Any attempt to apply values as a measure of the need and extent for protection has to be based on the whole system view. Protection is most effective as a centralised service, localised solutions consume cost and increase complexity.

## Protection and Placement

The question arises: What information should be protected? This leads to a conversation with the business around:

- ownership and control
- purpose
- dependencies, feeds and bridges etc.
- if it is part of a structured (e.g SAP, Oracle, Siebel) application how are business events managed
- if it is a 'desktop' type entity (e.g.

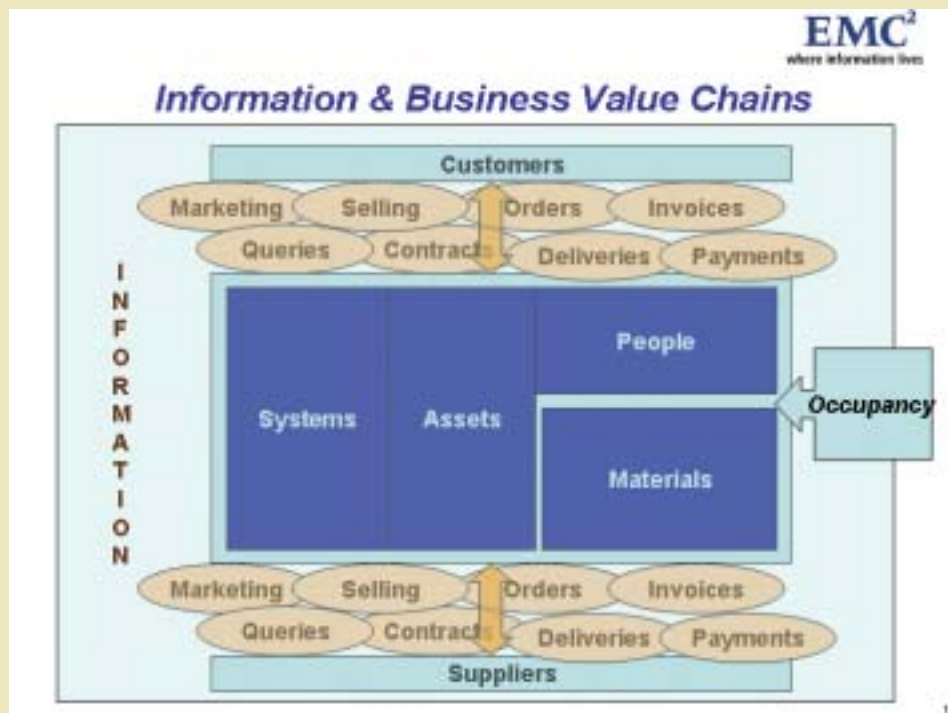
and corporate aspirations for the next 5 years then there is a multi million or even multi billion pound risk to mitigate.

Another important consideration lies in IT itself; IT Development is generally a key investment and the associated information assets such as programmes, scripts, processes, policies, schedules etc will have a value, hopefully one that IT can more easily define and protect. It is not unusual to see the Development Service run at the standby Data Centre on servers that may be allocated to Business Continuance roles at any moment. The economics of such sharing may be less appealing if the standby Data Centre remains as the Production site for any length of time and substantial delays to Projects are suffered concurrent with the Development Teams standing idle or at low utilisation.

In general everyone has taken protection beyond tape backup and is tackling replication in some form. This could be transmission of database logs to a remote site, ftp's to a remote site, a proprietary point solution for remote replication or remote replication between SANs. It is important to understand why protection is provided, just because it can (i.e. the tool is there and available) is not tenable in the long term and is typically a project level approach. Without a proper strategic basis, key entities may be missing from the protection regime and other entities may be included unnecessarily that could be managed at a lower priority or could be rebuilt from other protected items (e.g. a short term data warehouse). Information Protection must be part of IT Service Continuity Management and in some form part of the Business Continuity Plan (BCP).

## Continuing Availability

The ultimate deliverable of Information Protection is Availability to the User to the Service or Operational Level Agreement under all the included eventualities. This is the method of delivering the Business Value. In order to preserve the Value, a full IT Service Continuity strategy should take the thinking beyond the Protection measures to Service Restoration. In normal operation the Protection processes continue. Alerts should add a heightened level of monitoring and readiness, this is not just about security but should apply



Information as a major business asset is universally accepted, however the appearance of the value ascribed to corporate information is rarely clear and apparent in a balance sheet, this is clearly not a simple task. Information protection is very much constrained by what can be done for a given cost rather than what is needed. Interestingly, the advent of Sarbanes-Oxley and Basel II et al have moved (or should have moved) 'information' onto the board agenda. A typical UK Bank will have spent between £15M and £60M on regulatory compliance to date (according the recent Economist Intelligence Unit report). This may not be a large sum for the big Banks, even within an IT budget but the cost of founding a proper basis for protection would be a tiny addition in comparison to these numbers and less than proper protection represents an ongoing risk to compliance. The numbers will scale down for the businesses less burdened with cash but the compliance risk is still there and represents less than a proper job.

Excel Worksheet, Word document, Visio diagram) what are the taxonomy, placement and lifecycle considerations

Placement is a key technical consideration, we tend to focus on what is held in Data Centres. Until recently, a centralised approach to protecting laptop information has been impractical in any volume. However recent technologies, especially on the mobile front, are beginning to address this. Consider how laptops are typically used for business:

- planning functions
- design functions
- analysis functions
- communication
- trial balances
- market expectations

The users will be executives, managers and professionals probably with sub-optimal housekeeping practices and skills. If there are 100 laptops in a business each holding 10GB of sensitive corporate information then there is a 1TB protection challenge (amongst others). If the 100 laptops contain the plans, targets



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to things like a power supply switching to backup, a service 'call home' from a computer system or even staff holiday scheduling. Once a recovery to the remote site (or sites) is underway, as part of the Service IT Continuity Management a new protection regime is needed in some form and must be verified as functional. When recovery is complete the new environment must be assessed and secured for 'normal' operations and then the whole process reversed or traversed for the return home. Execution must balance business needs and service capability.

### Funding

Funding the investment for Information Protection is not likely to be trivial where remote site communications with some form of synchronised replication is involved. The current norm appears to be Project based funding stretched or manipulated to cover this cost. This is a mistake in the strategic context. It raises the risk that a Project cost will be unduly distorted and constrain a business development opportunity. It also raises the risk that the Project decision makers will default to a commodity view and see

the issue as a saving opportunity on the cost of storage rather than true Business Value and inadequate protection may result. An active Business Continuity Management (BCM) programme is the ideal means to provide the centralised, strategic focus on providing a protection infrastructure. Sponsorship from the BCM should lead to an Information Protection Infrastructure Project to establish the core elements and this should lead to a more informed approach as Projects design new and changed services and applications with appropriate protection free of unduly loaded charges.

### Protection and Value Received

With Information Protection in place a benefits realisation programme will demonstrate the effectiveness of the measures and the wisdom behind the investment. IT Service Delivery can bring this into the conversation with the Business Management through SLA / OLA reporting, IT Service Continuity Reporting, audits, assessments, support to BCM and recovery testing. Hopefully BCM will raise the overall profile of all Business Continuity measures and will be

actively promoting achievements through reduced risk assessments, reduced insurance premiums, better competitive positioning, assured regulatory compliance and improving reputation.

### Close

Clearly Business Value is not a static thing so Information Protection measures have to track the changes in the business and the environment. Changes that are going to impact Information Protection will include:

- the business itself, strategic, markets, competition, management, ownership
- the IT Strategy, as a response to internal change as well as external things like supplier policy and technical developments
- the regulatory environment
- the perceived threats
- the BCM responses

The presence and practice of such a continuing review will ensure that information with a clear Business Value will always be available to its users as required and that IT Service Delivery and its Business Customers are better aligned towards achieving an unbreakable and agile business. ■



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## "People – Your Killer Application"

Held at Bristol – 22<sup>nd</sup> March 2004

### *Two views of the seminar*

#### **Amanda Dansie** **EDUSERV**

With a title like that who could possibly resist finding out more at the March Seminar in Bristol! The attendance level certainly reflected this intrigue and would appear to demonstrate that there are plenty of IT professionals out there (from both commercial and public sectors) interested in this 'softer side' of the business. Recognising the strategic importance of people as a primary asset is clearly crucial to success – and perhaps especially so in an ever-changing technological world.

The day started with the usual preliminaries of an itsSMF update, book launches, and details of the Annual Conference and the Institute of Service Management being efficiently dealt with by John McDermott and Tony Brough.

The first presentation of the day was '*There's no I in Team*' given by Ian Bevan of Fox IT. Ian had chosen the central event of being a member of a brand new team with limited knowledge of the skills of other members, their personal interests, or even their psychological motivations as to being a part of that team environment. This was a good start to the day keeping us both amused and by making practical references to team situations that delegates found they could strongly relate to. Whilst I've not had the (mis)fortune of sharing Ian's specific experience of being a member of a totally novice rowing team picked to undertake training to competition standard – the characterisations of team members and team dynamics were sadly all too familiar. The failure of this 'Dream Team' in the rowing competition provided an opportunity to reflect on where teams go wrong and how things could have gone better. A major theme

was recognising that a team is made up of unique individuals bringing different attributes and strengths, and that these therefore need to be assessed and utilised creatively by the team leader or manager to ensure that members are assigned appropriate roles and that all assets can be fully harnessed. In fact, diversity is a particular strength and all teams can perhaps learn to value such multi-faceted contributions more effectively?

Ian offered plenty of pragmatic advice on how to ensure practical success and the creation of effective teams. He also made delegates acknowledge that Best Practice – whether in the form of ITIL or Prince2 – are implemented and maintained by teams of human beings. People respond differently to machines – they have personalised behaviour patterns that cannot simply be ignored.

Malcolm Lewis of Strategic Value Partners presentation was '*There must be a better way! – Effective Leadership*'. He started by evidencing the trend in the growth of soft intangibles when considering company's value over time. These intangibles – including people, IPR, and intrinsic knowledge – now apparently equating, on average, to an additional 72% on top of company book value. This was a thought provoking statistic to set the scene – but with staff clearly contributing to the success of any company effective and constructive leadership is therefore paramount. This point was essentially the core thrust of Malcolm's presentation. He blended quotes from business professionals and even David Brent giving a good mix of theory and thought provoking statements. One quote that stuck in my mind was from Bill Gates in 1981 '64K ought to be enough for anybody' which accompanied the topic of thinking beyond the existing frames of reference. Another was 'there is

no reason anyone would want a computer in their home' (Ken Olsen, CEO Digital Equipment – 1977). How wrong they were!

Quite a range of topics were clearly and professionally raised which were illustrated by some memorable examples. These included the difference between simply offering leadership as opposed to actively managing resources strategically; the function and operation of key team drivers; corporate missions and how this needs to be translated through into people orientated but service related goals.

The central theme of the day was further developed in the next presentation by Mark Hall of Severn Trent Water with his presentation '*People – Your only route to successful IT Service Management – A Progress Update*'. Mark chose the 'people, process and technology' trilogy as his opening theme highlighting that whilst the latter two topics have traditionally received a greater focus and are therefore rather more mature than 'people' this is now (inevitably?) requiring further investment and consequently gaining a wider profile. One inspiring slide identified the barriers to effective IT Service Management in terms of the ability to resolve pertinent issues. The 'incurable' aspects were identified as primarily people attributed such as the existence of a closed culture, people unable to change, and obtuse customers or interfering top management. Alternatively, the 'curable' elements included poor technical quality, lack of skills, and poor process quality. Interestingly, whilst good people skills can often provide at least some mitigation against failing processes or technology it is very rarely the case that inadequate human beings can be masked by efficient process or technology (however exemplary these might sometimes be). ▶



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The presentation then focussed on the role of the service management professional by distinguishing the features of poorly functioning ITSM teams against those of successful teams – including some useful practical advice. The seminar's theme of people was further expanded by adding the dimension of also viewing our customers and suppliers as people too – perhaps quite a radical thought for some? This stressed the importance of accommodating and being aware of the needs of customers – but especially identified that the customer's own perception of their needs (real or imagined) was a crucial determining factor in driving their expectations and interactions. The increasing dependency on suppliers or partnering organisations was also introduced in this context.

A particular message was again evident. "If you have an issue with *system quality* this can be counteracted if service quality is good and price is reasonable. If you have an issue with *service quality* no matter of improvement to system quality or price will counteract". Mark's second half of the presentation focussed on experiences and the ITSM programme within Severn Trent, ending in useful lessons learnt to date.

After lunch the charismatic Don Page of Marvel Group thankfully kept us all awake with a lively and colourful presentation entitled '*From Techie to Service Professional in 5 Easy Steps*'. This covered some quite basic ITIL and service management themes before concentrating on the generic theme of "people and teams" whilst also reinforcing those topics introduced by previous presenters.

By way of example, strong messages were revealed behind the Simpson and Thunder Cats cartoons. One slide which stuck in my mind was the warning 'Just one person can de-motivate and hold back delivering a quality service. Isolate and remove them – they are putting everyone else's job and professionalism at risk.' The issue here is particularly significant because it suggests just how easily a single individual can depress the cultural ethos of an organisation or team. The impact on team dynamics can often be quite dramatic (at least for those able to appreciate them) – but the eventual

tangible impairment to Service Delivery is unfortunately a rather subtle process.

The day identified several clear themes through a carefully integrated range of presentations and left delegates feeling that the role of the service delivery professional is now properly upon us. The importance of technological and process competency is not diminished by this in any way – but the realisation that the ultimate success of a service is measured rather more by the way that the client interface is actually managed is one worth grasping with both hands. It is all too easy to respond to problems by re-defining protocols or specifying enhanced technical capabilities but sometimes it is an examination of the internal human resource (ie skill deployment, operational structure, and team dynamics) that will actually engender the outcomes required.

Soft and gentle they may be, but these people skills are licensed to kill and have enormous creative potential to make the difference between success and failure. This is a topic certain to be revisited by the *itSMF* as more organisations develop insight into just how important a role people play in Service Delivery and its Management.

## **Beverley Robson** *AirMiles*

As with most people who have implemented ITIL, people issues remain very much to the fore when looking at our CSIP. We were therefore really pleased to see people as the main focus of the last *itSMF* seminar. The day was opened by Tony Brough of Marval – chair of the events committee, followed by John McDermott who gave an update from the *itSMF* office.

The first presentation by Ian Bevan from Fox IT was a humorous look at team dynamics using his experience as part of a rowing team. It really brought home the need to have the right people in the right place and how the whole project can be affected if you don't get it right. I am sure many of us don't have the luxury of choosing exactly the right people when setting up projects or teams but I will certainly take some time out to assess this

more in the future. One simple thing I did take away was the need for the whole team to have the same common goal or vision – simple I know but incredibly useful in ensuring the team move in the same direction. Ian also mentioned the importance of diversity and the use of tools such as Belbin. Another key point was the importance of celebrating success and feedback. All in all it was a great start to the day with lots of laughter and nods of agreement from the audience.

After coffee and the obligatory (but fun and useful) networking session Malcolm Lewis presented the next session – *there must be a better way*.... Malcolm set the scene by talking about the importance of people and gave us some quite startling figures on the growth of intangible values. In 1978 the difference between the book and market value of companies was 5%. This 5% is made up of people, brands, IPR and knowledge. In 1998 however this figure has grown to 72% – a clear reminder of how important our people and their knowledge are to us. He continued his presentation by discussing the difference between managing and leading and there was lots of thought provoking stuff including was Columbus a manager or a leader? Malcolm also brought out the importance of a clear vision and creating passion in your people. There were certainly some common threads between the first 2 sessions and this helped reinforce the importance of these themes.

Mark Hall then presented a progress update from Severn Trent Water. I had taken away a large number of useful ideas from a change presentation Mark did last year so I was keen to see if there was anything else I could pick up. Mark talked about the importance of understanding your organisational culture, managing and understanding your stakeholders and pushing business focus. He also mentioned (yes you guessed it) the need for a clear and compelling vision. Another point was that our customers are people too!

If we are clear about what matters to our customers and clear about their business needs we will be able to deliver a better service. AirMiles have been doing some similar work to Severn Trent so it was really interesting to see how our results

compared. Another thought provoking and useful presentation with lots of ideas for people to take forward within their own organisations.

Next was lunch and networking – this is a key part of the seminars and really useful. I chatted with lots of people and shared loads of ideas from service catalogue design to change management. I came away with a fistful of business cards and a feeling that I had made lots of useful contacts to share ideas and thoughts with in the future. This is probably worth the cost of the seminar alone and if you attend a seminar make sure you do it!

The team had made a good choice for the next presentation – Don Page from Marval. Lots of loud music and fun graphics including a 4 minute whizz through the world of ITIL and a look at why the Thundercats were such a good team! Don is incredibly passionate about service and this shone through.

Unsurprisingly he brought up the need to identify your prime directive! He gave us a few examples which were useful, and since the seminar we have actually changed our group name from Operations (bit old fashioned) to Service Delivery – a name our customers have a good chance of understanding. We are also working on identifying our vision to make sure we are all heading in the right direction. Don also suggested trying his 10 minute challenge – ask your team leaders to deliver a 10 minute presentation on the service deliverables from last month. Another great idea AirMiles will be taking forward is to develop and agree our own operational rules – this with the vision should make our responsibilities really clear. Again this is probably really obvious stuff but I can see how it would really make a difference.

The final presentation of the day was of great interest to me. Peter Wheatcroft

from Partners in IT talking about Moments of Truth. An article by Peter a few months ago had led me to using the concept to improve customer satisfaction. We had had some great results and I was keen to see how Peter's views compared to ours. Moments of Truth are all those little contact moments where customers make a judgement on service – for most people it only takes a few of these for them to decide whether the service they are receiving is good or bad. Peter talked about working out how many contact hours you have with customers each month, for example 15000 end-users encounter 3 employees per month for 6 minutes 35 seconds each which results in 59,250 hours contact time between customers and staff each year.

These sort of figures certainly show how powerful getting your Moments of Truth right can be! Another really interesting presentation with some useful things we could all do in our own organisations. ■



## New itSMF Members



### Individual

Kevin Shaw ( <i>Scarborough BS</i> )
Heikki Ristimäki ( <i>Fennia Mutual Insurance Company</i> )
Alison Hollingsworth ( <i>Nexor</i> )
Kathrin Gerrard
David Thomson ( <i>Plan International</i> )
Kerry Kinton ( <i>Digica</i> )
Matthew Miller ( <i>7C Alliance</i> )
Kevin Cooper ( <i>ICO UK</i> )
Nicola Bragg ( <i>Lucite International</i> )
Kevin Whiteway ( <i>BTTS Limited</i> )
Peter Watts ( <i>Watts Info Tech Services Limited</i> )
Prasanth Kumaran ( <i>Satyam Computer Services</i> )
Nigel Levens ( <i>London Borough of Camden</i> )
Mark Dix ( <i>London Borough of Camden</i> )
Phil Reilly ( <i>Reilly Consultants</i> )
Peter Greenham ( <i>London Borough of Ealing</i> )
Ian Bacchus ( <i>NHS Direct</i> )
Mikhail Chernyakov ( <i>Halliburton</i> )

### Individual (cont.)

Malcom Ashdown ( <i>Tewkesbury Borough Council</i> )
David McAuley ( <i>Conclusion Business Transformation Service</i> )
Alim Ozcan ( <i>Victim Support</i> )
Matthias Leybold ( <i>Bearingpoint Switzerland</i> )
Julian Bruckshaw ( <i>GIST LTD</i> )

### Sole Trader

Fran Davern ( <i>Fran Davern &amp; Associates</i> )
Jason Beasant ( <i>Enterprise Service Solutions</i> )
Roger Jarvis ( <i>Jarvis &amp; Company</i> )
Neil Wilson ( <i>NewWorld Training &amp; Consultancy</i> )
Leon Levy ( <i>Capacity &amp; Performance Solutions</i> )
David Cuthbertson ( <i>Stalcada</i> )

### Corporate 5

Competition Commission
Cumbria Constabulary

### Corporate 5 (cont.)

Cybermation
University of Manchester
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Monactive Limited
Land Securities PLC
Unilever R&D Port Sunlight
Edexcel
SITA
Bank of England
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Dabs.Com
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# IT Service Continuity in Practice



**Gary Donlon**  
*Senior Consultant*  
*Jermyn Consulting*

## 1. Introduction

This is the second article in a series from Jermyn Consulting regarding IT Service Continuity Management. The first article, entitled IT Service Continuity – Know the Unknowns (**servicetalk** April 2004), discussed how an IT Manager can develop IT Service Continuity capability by using business impacts as a base. This article illustrates the components of IT Service Continuity and how it supports other processes and procedures.

IT Service Continuity should be part of a Business Continuity Framework. The need for an effective Business Continuity Framework is becoming recognised across many UK organisations and regulatory bodies. For example, the Financial Services Authority requires regulated Firms to have in place “appropriate arrangements... to ensure it can function... in the event of an unforeseen interruption...”<sup>1</sup> Additionally when enacted during the latter part of this year, the Civil Contingencies Act will impose obligations concerning Business Continuity upon local authorities, the emergency and health services, amongst others<sup>2</sup>.

Regardless of the regulatory or legislative framework that an organisation operates within, Business Continuity and IT Service Continuity represent good business practice. This is the basis for including IT Service Continuity Management as an ITIL discipline.

## 2. IT Service Continuity's Place

We cannot know the potential causes of all IT emergencies. Through IT Service Continuity we are seeking to minimise business impacts by creating a resilient infrastructure (to reduce the risk of loss) and by planning for the response (to reduce the effects of loss).

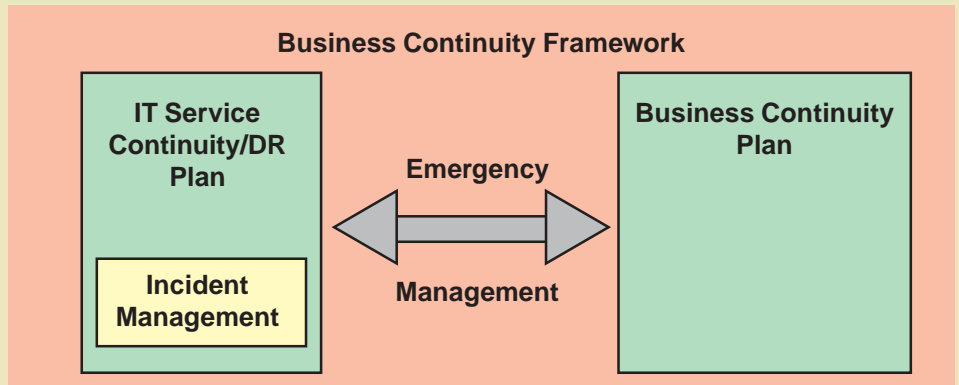


Figure 1 - IT Service and Business Continuity Relationship Model

To be effective, IT Service Continuity must align with the organisation's emergency management procedures which themselves form part of the Business Continuity Framework. In addition, IT Service Continuity must be underpinned by robust Incident Management (see Figure 1 above).

result of IT Service loss.

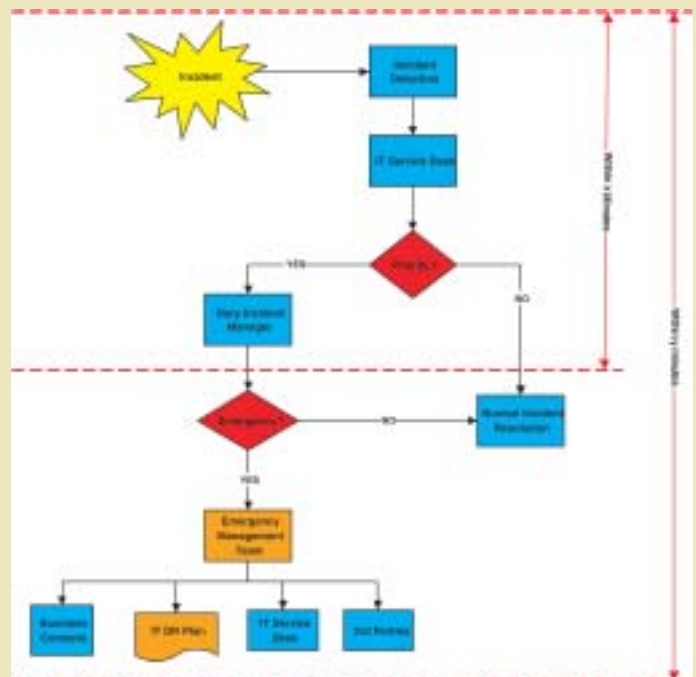
The Incident Escalation process outlined below provides a clear route to senior management, whilst preserving a degree of control over the escalation. The remainder of this article will consider each component of this process.

## 3. The Importance of Incident Management

*“Large streams from little fountains flow, Tall oaks from little acorns grow”*  
David Everett  
1769 – 1813

If you don't know that there has been a disruption to your IT Services, you cannot effectively manage a response. It is critical that the Incident Management process operates efficiently. Delays in detecting or escalating an incident can result in significantly increased impacts on the organisation as a

Diagram 1 – Incident Escalation



**Figure 2 – Service / Asset Matrix**

	Asset Name	Asset 1	Asset 2	Asset 3	Asset 4	Asset 5	Asset 6
IT Service	Service Recovery Policy						
Service Name 1	1	X		X			
Service Name 2	1		X	X			
Service Name 3	3			X		X	X
Service Name 4	4				X		

### 3.1 Incident Detection

In the event of an environmental disruption such as fire, the need for emergency management will be clear. As such, the initial detection and escalation procedures outlined above are redundant. For component failures however, this clarity is not available, and so the detection and escalation procedures will be important.

For some organisations, detection of an IT incident will come via the user community. For others, detection may be via an automated alert. In either case, the Service Desk should be notified as soon as practicable that the incident has occurred, and take ownership of it.

### 3.2 Service Desk and Incident Prioritisation

The Service Desk, following normal operating procedures, records details of the incident and performs an initial analysis as regards business impacts and Service Level Agreements. From this analysis the Service Desk assigns a priority, escalating to a Duty Incident Manager if the incident is assigned a Priority One. Anything below Priority One would fall to normal incident resolution procedures, and is therefore outside the scope of this process.

The correct and timely prioritisation of an incident at this stage is critical. To assist the Service Desk, a configuration management database would prove invaluable. If this is not available, the Service Desk may find an IT Service / Asset Matrix useful (see figure 2 above). This Matrix identifies the relationship between IT Services and the assets or components that support them. In addition, the IT Service recovery policy should be

included. More information regarding the development of IT Service recovery policies can be found in the previous article (*IT Service Continuity – Know the Unknowns* **servicetalk** April 2004).

### 3.3 Duty Incident Manager

The Duty Incident Manager would typically be a senior member of the IT Management Team. Immediately a Priority One incident has been escalated, the Duty Incident Manager must assess its severity, or likely severity, and decide whether the incident should also be classified as an emergency. As such, an emergency definition is required. This definition should apply to an emergency originating from within the IT Department's span of control, or from the business.

If the Duty Incident Manager decides that the incident falls within the definition of

an emergency he takes control, makes an initial damage assessment and escalates to the Emergency Management Team. Anything not defined as an emergency would fall to normal incident resolution procedures and is therefore outside the scope of this process.

## 4. Emergency Management

The transition from incident management to emergency management must be seamless. Any delays in the escalation process will result in unnecessary impacts upon the business and may, in extreme circumstances, render the business unable to recover.

### 4.1 The Emergency Management Team

The Emergency Management Team (EMT) is the guardian of emergency management. Different organisations may use different terms – such as the Crisis Management Team, Emergency Response Team or Gold Command – but their functions are the same. The EMT is responsible for the command, control, communication and co-ordination of the emergency response.

The London Emergency Services Liaison Panel (LESLP) suggests that there are four stages to “major incidents”<sup>3</sup> – or using the terminology that we have discussed, “emergencies”. These stages are:

1. The initial response
2. The consolidation phase
3. The recovery phase
4. The restoration of normality

LESLP Stage	EMT Responsibility
Initial Response	<ul style="list-style-type: none"> <li>● Ensure the health and safety of staff</li> <li>● Ensure site security</li> <li>● Convene a meeting of all members of the EMT</li> <li>● Notify senior business managers</li> </ul>
Consolidation Phase	<ul style="list-style-type: none"> <li>● Identify users affected</li> <li>● Identify the technical implications</li> <li>● Establish recovery priorities and allocate resources</li> <li>● Formulate the IT technical and staff recovery strategy</li> <li>● Notify the Service Desk</li> </ul>
Recovery Phase	<ul style="list-style-type: none"> <li>● Implement the recovery strategy</li> <li>● Establish internal and external communications</li> <li>● Invoke the Business Continuity/IT Disaster Recovery Plan</li> <li>● Notify key stakeholders</li> <li>● Manage recovery activities</li> </ul>
Restoration of normality	<ul style="list-style-type: none"> <li>● Complete emergency related administration</li> <li>● Plan orderly transfer of operations back to a normal operating environment</li> <li>● Dissolve</li> </ul>

**Table 1 – EMT Responsibilities**



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Using the LESLP's stages as a base, the Table at the foot of the previous page outlines the EMT's responsibilities.

In selecting members of the EMT, personality traits are as important as day to day responsibilities within the organisation. An EMT should comprise a leader, an administrator, an optimist and a pessimist(!), a completer/finisher, a technician, a people person, a representative from operations and a financier. Of course the pessimistic accountant would ideally fit two of these roles!

## 4.2 Enabling Recovery

Successfully completing the initial response and consolidation phase following an emergency lays firm foundations for successful recovery. The Business Continuity and IT Disaster Recovery Plans will contain information to assist the recovery phase in particular.

Such Plans record the main recovery activities and act as a reference source for the procedures required to recover core processes (whether business or IT-related) following a disruption. The Plan may define:

- Roles and responsibilities of key functions or individuals in the Plan.
- The recovery management structure. This is likely to differ from business management as usual reporting lines and organisational structure lapse.
- Tasks to be completed in pursuit of business continuity and disaster recovery. Each Recovery Team defined in the Plan will have its own tasks to complete.
- Reference information required to support the tasks. This may include emergency operating procedures, IT technical recovery guides and contact details.

- Minimum resources required to support the tasks. For example number of staff required over time, number of workstations, work area recovery location, communications infrastructure and IT Services required.

A Plan in isolation will not enable recovery, however. Unless preparations have been made to ensure that the minimum resources are available, then recovery within acceptable time frames will be unlikely.

## 5. Maintaining IT Service Continuity Capability

Having invested time, money and effort in developing an IT Service Continuity Management programme, and ensuring that it aligns with the wider Business Continuity Framework, it is important to protect the investment.

Other ITIL disciplines can assist. For example, including IT Service Continuity considerations into your Change Management process will ensure that your recovery capabilities keep pace with the live environment. Developing Service Level Management to encompass "recovery mode" SLAs will ensure that the business is aware of your capabilities.

Appointing a Service Continuity Manager is an effective way of maintaining your investment. In any but the largest organisations or most complex IT infrastructures, this role need not be full time. It is often an additional responsibility for the IT Manager. However, the role and responsibilities must be explicit – to include regular discussions with business representatives.

## In Summary

IT Service Continuity comprises the

technical infrastructure necessary to enable recovery, in addition to the plans for people and process. To operate effectively, it must be underpinned by robust incident management and support escalation to the organisation's senior management team.

It is likely that the emergency management structure will differ from that used for day to day operations. The membership of the Emergency Management Team should be selected according to individual personalities as well as functional responsibility.

The Business Continuity and IT Disaster Recovery Plans must align, with clear actions defined to enable recovery. The infrastructure required to support recovery (for example PCs and communications) should be prepared in advance. Having invested in IT Service Continuity Management, the investment can be protected by appointing a Service Continuity Manager.

More than forty percent of businesses affected by the Manchester bombing went out of business, never to return<sup>4</sup>. Efficient and effective emergency management may mean the difference between business recovery and business failure. ■

*NB If you have any questions regarding this article, please contact the author: gdonlan@jermynconsulting.com*

(Footnotes)

<sup>1</sup> Source: SYSC 3.2.19G FSA Handbook

<sup>2</sup> Source: Civil Contingencies Bill 2004. Crown Copyright.

<sup>3</sup> Source: LESLP Major Incident Procedure Manual 6th Edition

<sup>4</sup> Source: London First: Expecting the unexpected. Business Continuity in an uncertain world.

## People on the Move

Fox IT has further strengthened its sales team with the recruitment of two more Senior Account Managers; Paul McCann has joined the Southern Sales Team and Robin Sturch the Northern Sales Team. Alyson Herlihy from Eversheds LLP, Mark Willis from Northgate Information Solutions Ltd. and Grant Adams from ELWa have recently joined the Fox IT integrated Training & Consultancy delivery team.

### *Moving on Up... Moving on Out... at the itSMF office...*

Massive congratulations go to **Maxine McMahon** who has been promoted to Events Manager. Maxine was previously Aidan Lawes' PA/Office Manager. If you have any ideas on format or topics for itSMF events, please contact her directly. If there are any events in the marketplace that you think that the itSMF should attend or be represented at, please let us know. Any ideas email her at maxine.mcmahon@itsmf.com. Our events administrator **Jenny Bogg** who has worked for the itSMF for over three years is off to pastures new. Jenny will be sadly missed and has been a valuable member of the itSMF team. Jenny is moving on to Novartis Pharmaceuticals and will be putting all her events knowledge into her new Events role.

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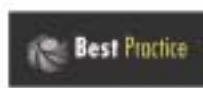
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## The Story So Far

**Colin Rudd**  
*President*

The Institute of IT Service Management is rapidly establishing itself as a centre of excellence for the development of Service Management professionals. Established in 2002 the Institute already has members from America, Denmark and the Far East and is, even at this early stage, developing on a worldwide basis. The Institute owes a debt of gratitude to its founder President, Colin Meaden. It was thanks to his ideas, drive and enthusiasm that made it what it is today and was a contributory factor to the award of his thoroughly well deserved Lifetime Achievement Award. All members of the Institute offer him their thanks and well deserved congratulations.

The Institute exists in order to provide guidance and support to individuals throughout the IT Service Management community. The Institute aims to ensure that requirements for professionalism and ethical conduct are maintained and developed in our members and within the industry as a whole. The Institute aims to achieve this by:

- accrediting an individual's level of professional competence and integrity through the award of one of our grades of membership
- ensuring members participate in our Continuing Professional Development (CPD) scheme
- defining the standards expected for professional conduct, through the institute's code of conduct and the associated disciplinary procedures

The Institute aims to promote and support the standing of its members by establishing high standards of professional and ethical conduct, ensuring continuing professional development of its members in order to demonstrate their competence and commitment. There are membership grades available for people of all levels of skill, knowledge and experience:

- **Student grade:** for those involved in full-time education with an interest in Service Management
- **Associate grade:** for anyone with an interest in Service Management activities
- **Practitioner grade:** for those who have gained the Foundation Certificate

or equivalent and who are actively involved in at least one Service Management process

- **Member grade:** for those who have the Manager's Certificate in Service Management or its equivalent and are actively involved in the Service Management processes or their direction and governance.
- **Fellow grade:** for those who have all the skills and attributes of a Member grade but who have also contributed and continue to contribute to the development of the Service Management industry.

The Institute is run on behalf of its members by a Council, principally elected from the Institute membership by the members themselves. The Institute's current Council members are:

*President:*  
Colin Rudd  
*President Elect:*  
Phil Montanaro  
*Vice President (CPD Board):*  
Gerry Mos  
*Vice President (Membership Board):*  
Vernon Lloyd  
*Vice President (Promotions Board):*  
Sean Lewis  
*Treasurer:*  
Ivor Macfarlane  
*CEO itSMF:*  
Aidan Lawes  
*Ordinary Council members:*  
Chris Littlewood  
Tony Price  
Dave Bingham  
*Co-opted Council member:*  
Alan Stevens

The Institute's processes are principally owned, developed and run by three boards. The responsibilities of the Institute's constituent boards are as follows:

- **The CPD Board:** maintain the Institute's Continuing Professional Development (CPD) scheme, which provides the structure and process to

assist individuals to improve and update their professional skills and knowledge. The CPD scheme is linked with both the British Computer Society's (BCS's) Industry Structure Model (ISM) and the SFIA Foundation's Skills Framework for the Information Age (SFIA). The CPD Board are also developing a mentoring scheme to enable members to benefit from the skills and knowledge of more experienced professionals in all areas and specialisations of Service Management.

- **The Membership Board:** are responsible for the maintenance of the membership application processes and procedures. They assess, validate and approve all appropriate applications for membership of the Institute.
- **The Promotions Board:** maintain the Institute's web site [www.iosm.com](http://www.iosm.com), develop all of the marketing material and ensure that all internal and external Institute communication is conducted efficiently and effectively.

The Institute is currently investigating the possibility of establishing Corporate Sponsorship Programmes (CSPs) with interested organisations, where a number of personnel within the organisation are interested in becoming members of the Institute. The work for this initiative is currently being progressed by both the CPD and Membership Boards to develop processes and procedures to improve the efficiency, reduce the bureaucracy and reduce the cost of entry to the Institute in these situations.

A number of organisations have already approached the Institute and are actively working with the Institute to develop relationships to assist them in the development of careers and grades for Service Management personnel and positions within their organisations

The Institute's activities are entirely complementary to the *itSMF*'s. The *itSMF* exists principally for the benefit and development of its member organisations whereas the Institute exists principally for the benefit and development of its individual members. To that end the Institute periodically

organises meetings for the benefit of its members. The first event, entitled “Your Institute – The Way Forward” was held at a hotel in the Midlands in early February and was well attended by many members. The meeting discussed and agreed many issues and actions for the future development of the Institute. These were principally in the areas of membership growth, operational processes and in the types and frequency of future events that would appeal to its members. It is planned that future events will take place on a quarterly basis and may be developed on a regional basis in the future.

The Institute is actively developing relationships with other organisations within the IT industry. Three of the first to be approached were the British Computer Society (BCS), the Chartered Institute of Professional Development (CIPD) and the Skills For the Information Age (SFIA) Foundation. The BCS are interested in developing reciprocal arrangements with the Institute that will possibly enable Institute members to take advantage of discounts and discounted membership of the BCS and take part in joint activities and events.

The CIPD are being approach to assist with the development and operation of the Institute’s CPD programme to ensure that it delivers value and satisfies the requirements of the members. It is hoped to develop a relationship with the SFIA foundation that enables the Institute to assist them to develop their SFIA framework to encompass all of the Service Management disciplines.

If you would like any further help or information on the Institute please contact myself or any of my fellow members of the Council or visit the Institute’s web site at [www.iosm.com](http://www.iosm.com). ■

# What Membership of the IoSM Did For Me

**Richard Wright**  
*English Heritage*

I was elected a Member of the Institute of Service Management quite recently, but from that moment both my employer English Heritage and I immediately gained some very significant benefits. I would like to tell you about some of these benefits so that you too can take advantage of this opportunity.

First of all I am now a member of a recognised professional Institute that has validated my eligibility to practice as a Service Manager. I am entitled to put the letters MISM after my name if I wish (I’ve been ISM’d!), and this is an indicator of my level of professionalism to people who do not know me.

I have made a commitment to pursue a programme of Continual Professional Development. This is more than keeping up to date with Best Practice in Service Management. It is about developing my personal skills and attributes to improve my ability to **deliver** that ‘legendary’ service we now talk about. I have also signed up to a code of conduct that maintains the standards and the integrity of the Institute.

As a member of the Institute I now have access to a wealth of advice, guidance and mentoring from a wide range of very experienced Service Managers. At the same time I am also able to contribute something to the profession by helping others develop their skills and to pass on experience that may help them to avoid common pitfalls in Service Management.

Like all members of the English Heritage Service Management Team I have studied for and sat the ITIL Managers Certificate exams and attended as many of the *itSMF* events that I can, but this alone is not enough. Indeed, it is too easy to sit back and stagnate after qualifying, but this is where the Institute has given me the guidance, encouragement and motivation, to develop my personal skills as a Service Manager.

From my employer’s perspective, English Heritage needs assurance that their IT Services are in safe hands. Membership of the Institute has helped give English Heritage that assurance through external endorsement of my abilities. They can have confidence in my level of professionalism and my commitment to improve and develop with the help of the very best people in the field. My ability to deliver has increased and the risk of failure is diminished.

By the time you read this I am hopeful that all of the English Heritage Service

Managers will have been admitted to the institute, but **you** have the chance to seize this opportunity too.

So go on... Fill in the IoSM’s application form (it is not as bad as it looks) and be part of this great Institute.

Be inspired, Be challenged...  
Be ISM’d. ■

## Institute New Members

Name	Organisation	Status
Barry Lewington	UKimc Ltd	Member
Stephen Aspinall	SHL Group Plc	Practitioner
Lidia Muggleton	Atos Origin	Member
Ian Clark	Foster Melliar Pty Ltd	Member
Jane Seeley	Exel Plc	Fellow
Jonathon Traer-Clark	CSTC Consulting	Member

## Our Regular Round-Up from Across the UK

### Midlands and East Anglia Region

7<sup>th</sup> April 2004 – Marval Group, Kettering  
**Rosemary Gurney**  
*Wardown Consulting Ltd*

For our April meeting we were welcomed by Don Page and the Marval Group at their headquarters in Kettering. Jim Davies, regional chairman opened the day by welcoming members and outlined the agenda for the day. The obligatory round of introductions revealed a high number of first timers to a regional meeting, they were made to feel especially welcome and urged to get involved

To start the morning's business, John McDermott gave an update on the activities on the *itsSMF*, reminding members that the organisation exists for their benefit and that the office was open to receiving comments and suggestions on all aspects of its work, both now and in the future. There was further encouragement for individuals to join the Institute of Service Management and a reminder that delegate bookings are now being taken for this year's Brighton conference on 8<sup>th</sup> – 10<sup>th</sup> November.

Sarah Whittaker (Computacenter) then gave a presentation on the outcomes from the January meeting where the discussion centred around the book '*Planning to Implement Service Management*', what was good about it, what was less good and areas where members felt further work was required. There was so much material generated during these earlier discussions that Sarah has undertaken to supply copies of the slides to those who require them.

Don Page then joined us and we discussed the need to work closely with our customers and organisations to ensure that the services that we are providing are the ones that they actually want and need. Don then kindly shared with us a presentation he had given recently introducing ITIL to an American audience. The resulting 3.5 minutes of fast moving slides illustrated with images

of The Simpson's, to the vocal sounds of Elvis demonstrated very effectively that whatever your subject you must be clear who your audience is and what their level of understanding and attention span might be.

After lunch, we returned to our theme of 'continuing the momentum' by breaking into groups to debate questions such as, "Our processes have been implemented and reviewed, what next?", "How do we know if we need process improvements or to adjust our targets?", "What criteria should we use to determine success or failure?" and lastly, "Should we drive for efficiency or effectiveness?"

We concluded that process improvement was cyclical and that we should continue to measure and monitor the effectiveness of our processes against a background of business change. We also considered whether the time was right to seek external validation and accreditation. Criteria for determining success would be based on the criteria of the organisation and whether or not they are still valid. Finally, we concluded that we should be effective first and then strive to do the rest efficiently.

The meeting concluded with a discussion on future topics and speakers. Many thanks to Marval for hosting this event. The next meeting will be held at NFU Mutual, Stratford on Wednesday 7<sup>th</sup> July.

### Scottish Region

21<sup>st</sup> April 2004 – Edinburgh  
**Tom More**  
*FMS*

The event was hosted by Scottish Equitable at their Edinburgh Headquarters with all members welcomed by *itsSMF* Regional Chairman Ian French of FMS who outlined the format for the morning's events. Ian introduced Jayne Day of AEGON Asset Management UK who was sponsoring the event, Aidan Lawes CEO of *itsSMF* and

Ken McLachlan of Sky the main speakers for the day.

Aidan presented an update of the latest news of the *itsSMF* programmes highlighting interesting forthcoming events and publications expected before the end of 2004. He also stated that the uptake of BS 15000 Certification is taking off with 4 companies achieving registration and 3 interested to date. This is expected to accelerate especially in the Outsourcing Business. Work is on-going to promote BS 15000 as the international standard. Finally he advised that *itsSMF* is undertaking a strategic review using consultants, who may contact members seeking their opinions and input.

Ken McLachlan of Sky presented the day's topic '**Problem Management @ Sky**'. Sky has seen a massive growth over the last 10/15 years with current staffing levels of 10k to support the company's position as a leading broadcaster and digital technology supplier. These functions were split but are now coming together in June 2004 as Sky Service Management Team and will result in an amalgamation of the Help Desk's giving a consistent approach to IT support.

Ken's experience indicated that in most service companies their main challenge was in differentiating between 'Incidents' and 'Problems'. Also prioritising problems was quite difficult and Sky were in the process of implementing systems and processes to identify the magnitude of the incidents/problems recorded. Sky also handles major production incidents. These are classified as incidents which would impact Sky's ability to generate revenue.

Although Problem Management at Sky has been established for some time Ken has been tasked with the formal implementation of processes and tools. As a starting point to meet this challenge his first task was to initiate a re-write of their Incident & Problem Management System process. He will then instil a

consistent approach to problem reporting, increasing staff efficiency and in future promote a pro-active approach within management to identify the problem or incident before it escalates out of control.

He also plans to re-define a 'Major Production Incident'. Currently incident and resolution codes are numerous which leads to inconsistency. Once identified these need to be prioritised by volume and action trigger points established.

To assist in the root cause analysis he proposes the introduction of "Key 21 questions" to assist in identifying the root cause of why a problem has occurred. This will involve re-educating staff to ask relevant questions when gathering information. It is expected this will greatly assist root cause identification. This consistent approach will highlight a list of probable causes which will be rated and corrective action determined. Finally once resolved and proven the Change Management team will get involved to produce an action plan to introduce a change.

Problem Management is the key to a proactive quality service and Sky are taking this seriously in their pursuit of customer satisfaction.

Ian French thanked AEGON for sponsoring the event and both Aidan and Ken for their excellent presentations.

Finally our thanks to Scottish Equitable for providing the venue and for an excellent buffet lunch which rounded off a very interesting morning.

## Northern Regional

4<sup>th</sup> May 2004 – Bradford

**Jeremy Shaw**

*BT Solutions (Northern Ireland)*

The regional chair, Tony Gannon of Fox IT, welcomed us to Yorkshire Water's training centre at Esholt Hall near Bradford. Our delight at the very agreeable Bronte country surroundings (and lunch in the conservatory during the event) was only slightly tempered by the revelation that we were in the middle of one of the largest sewage treatment centres in the UK. Luckily the winds didn't blow till later in the day.

The theme of the day was 'Biz Speak not

Techno Babble'. Initial reflections from Yorkshire Water's IT director, Alan Harrison, suggested that a lot of the organisation's shift from a 10<sup>th</sup> in class to 2<sup>nd</sup> in class service organisation was due to IT getting closer to the business, aligned with a recognition that service improvement is about managing organisational change well. Two main speakers approached the topic from different perspectives.

Gary Donlon of Jermyn Consulting reviewed the theme from a service continuity perspective and looked at ways to use the service continuity theme to open channels of communication with the business. A few themes highlighted alternative approaches to the debate:

- The starting point should always be to understand what's important to the business and through this understand the priorities for the business in the event of service failure
- The approach to service restoration should firstly take account of the impact on the service to guide the urgency of what needs to happen to restore
- Joint ownership of service continuity is key, rather than it being viewed as an IT problem; one of the ways that Gary suggested that this can happen is through scenario workshops drawing together stakeholders from across the business to see what would actually happen in a disaster scenario
- As well as one off reviews, ongoing joint ownership can be achieved by steering groups meeting on a regular basis

Mike Baker of the Big Food Group, initiated a more general discussion on communication and understanding of IT across the business, although he started with a photo of what you can get at Iceland for a fiver, asking the question, would the customer regard this as good service? (and ended, suitably enough, with a two for one offer on frozen Yorkshire puddings)!

In between times, Mike reflected that although ITIL provides a common language for service management, it does not necessarily do so for interface with the business. A number of service processes provide a bridge between the business and IT (especially, service level and continuity management and the

service desk) and we debated the merits of roles in these areas being filled (and paid) by business or IT people, concluding that a combination of experience was key and that clear communication and understanding of terminology was critical to overall business success in this area.

One proposal by Mike to address misunderstanding was the principle of generic articles to define terminology in areas linking to or parallel to ITIL. This links to the idea that IT and business discussions happen across a range of representative areas of the organisation, each making their own contribution to the success of the business; IT is one of these business areas.

John McDermott was also on hand to provide news from the *itSMF* office and wider community, informing us of the organisation's presence in 19 countries, the presence of a new full time events manager (to make Tony's and the rest of the regional group chairs' life easier!), the reissue of the books next year and current expectation that the business perspective was planned currently to publish prior to conference.

The day was closed with some thoughts from the chair and a special thanks to Mike Buck, and the IT Management team from Yorkshire Water for providing the facilities and for all the logistics for the day which were well received, and well organised. As always there was an appeal for further venues and a request for feedback as to what type of events the group now wanted to see, The next scheduled event for the Group being 3<sup>rd</sup> June and would be a first for the Northern *itSMF* Group. A one day workshop facilitated by an organisation outside of the Service Management community.

Finally, from the perspective of an interloper from the northern part of the emerald isle, I thoroughly enjoyed the event and begin to dream of Northern Ireland hosting its own regional activities in future, perhaps with dual nationality and affiliation to the Irish chapter and one of the UK regions.

We might or might not need alternative local badge colours but we'd definitely require a test drive on Mike Baker's "Babbleometer". ■

# creating and maintaining momentum



## 13th Annual Conference & Exhibition 2004 Hilton Metropole Brighton 8 - 10 November 2004

'Creating & Maintaining Momentum' follows last year's 'Breaking Boundaries, Building Bridges' in continuing the overall theme of Creating Stability in a Changing World.

Over the years, more and more companies have come to embrace the concept of managing the provision of their IT services based on industry best practice as documented in ITIL and BS 15000. This is reflected in the increased attendance year-on-year at the annual *itSMF* Conference and Exhibition.

One of the burning issues faced by many IT service providers nowadays is how to create and subsequently build on progress already achieved. The *itSMF* 2004 Conference & Exhibition concentrates on how IT Service Management initiatives may falter or even come to a complete halt due to apathy, lack of management support or focus, flavour of the month syndrome, as well as numerous other influences. It is imperative that these potential pitfalls are recognised and managed should they arise, to ensure that the momentum is maintained throughout a continuous service improvement program.

The event provides the perfect opportunity for all service management professionals to network with others in the same market and to hear views from the experts about the changes in technology and the new challenges that they will bring.

### The *itSMF* IT Service Management Awards

The renowned *itSMF* awards will be presented on the Tuesday evening (Gala Evening) of the Conference & Exhibition. The awards are for individuals and organisations that have excelled at Service Management or have significantly contributed to this area.

If you want more information or to make a nomination please visit our website, [www.itsmf.com](http://www.itsmf.com), or request a brochure outlining the rules and entry criteria.

### Book early for 2004 *itSMF* conference

	Members	Non-Members
Book before 31st July 2004	£845	£1120
Book after 1st August 2004	£995	£1320

Sunday night accommodation can be booked at a cost of £52.50 single and £93.50 with partner (prices exclude VAT).

Members and non-members are welcome to attend. The Conference and Exhibition has a vast array of experts in the field of IT Service Management in which everyone is able to network and gain knowledge and a fuller understanding of the ITIL processes. There are a large amount of Exhibitors who will be there to assist in aiding the smooth transition in achieving the implementation of ITIL.

A not for profit organisation wholly owned by its members, the *itSMF* is dedicated to the development, evolution and promotion of best practice and standards in IT Service Management. This is achieved through close cooperation with organisations such as the OGC and BSI on ITIL, BS 15000 and associated qualification schemes. In fact, many of our members are responsible for and make active contributions to their progress and development. For example, the *itSMF* are responsible for the numerous ITIL - based pocket guides and the QA of new material.

***itSMF***  
The IT Service Management Forum

stability in a changing world

# "Creating and Maintaining Momentum"

To coincide with the Early Booking Offer, found on page 24, the itSMF Conference Committee have released a sample of some of the presentations which accounted for a third of all submissions received. This is only a small selection, more of the confirmed speakers and Summer. In line with our overall theme of "Creating and Maintaining Momentum" the submissions below

*Nigel Mear, Cable & Wireless*

## **"Unlocking the potential within your organisation to create truly sustainable momentum"**

Momentum is defined as the power of overcoming resistance to motion. With any Service Improvement Programme when the quick wins are delivered the tough work starts, yet at this critical stage progress can slow, and traction can be lost. Continued sponsorship and vision are critically important but creating sustainable momentum can only come through releasing the true potential of the key individuals and teams within the company. Your people hold the key and need to be equipped to drive further improvements in the face of new challenges and changes. In reality they are your only natural source of true momentum but they will face many cultural, organisational and personal challenges. This presentation will introduce the concept of coaching within ITSM and show why this is *the* vital ingredient for successfully creating and maintaining momentum. It will outline the fundamentals, introduce some of the tools/techniques, show you how to identify opportunities, and demonstrate how to put it into practice within your organisation to complement your other ITSM activities.

*Neil McBride, De Montfort University*  
**"Service Culture and BS 15000"**

This presentation investigates culture within IT services. The importance of culture as a key element in service delivery is established. Organisational culture and its characteristics are established. The nature of service culture is explored. Storytelling, cultural expressions, the role of knowledge, power, and communities of practice are covered. The presentation considers the influences on IT service culture and the generic nature of ITIL culture. How culture might be changed and what might be needed in terms of IT service cultural change is examined. It is suggested that BS 15000's focus on structure and process omits the vital element of culture.

The talk ends by suggesting texts for a cultural BS 15000 code of practice.

*Chris Morgan, Exel*

## **"It's not where you start, it's where you finish!"**

Exel's Olympus programme won the Innovation of the year Award in 2003. Chris has played a leading role in the measurement aspect of this programme and will share Exel's approach and experiences of maintaining momentum through measurement. He will cover the various aspects of measurement used in the Olympus programme, including benchmarking, use of a maturity model, KPIs, management reporting, benefits bank and education of staff. Being an avid England Rugby fan, he intends to include an analogy with the England Rugby team and their progress from the 1998 tour of hell in Australia to becoming World Champions in 2003 – "It's not where you start, it's where you finish!"

*Paul Fitzpatrick, AstraZeneca*

## **"Pitfalls / Lessons Learned implementing Service Management during a Global re-structure"**

This covers the challenges and discusses how AstraZeneca is striving to implement solutions after the experience of navigating pitfalls and lessons learned attempting to implement IT Service Management during re-structure of a Global organisation. Lack of ITIL, varied acceptance of framework across Sweden, UK, US, cultural differences, lack of Operating Mode, lack of integration across functions – science and corporate, staff moves, re-alignment of activities – needs professionalism and sensitivity. Rolling out new services – Scientific Help Desk, Lab Based Computing Service. Integration of Shared Services into Business IS.

*Claire Squires & Corrie Molleman, Environment Agency*

## **"Implementing Service Management in large complex Government Agency – key approaches"**

The Environment Agency is a large

complex government organisation with 12000+ customers across England and Wales. This presentation aims to impart the experience and knowledge gained through implementation of the largest IT Service Improvement Programme (SIP) in the history of the Agency. It addresses:

- ❑ Reasons for the scale of investment and decision to implement full Service Management
- ❑ Key approaches to structuring a SIP and maintaining an integrated approach
- ❑ Tips on achieving process-driven organisational design
- ❑ Innovative approaches to communication (achieving buy-in)
- ❑ Progressing people along the change curve the fast and positive route
- ❑ Potential pitfalls

*Steve Boronski, Stoke-on-Trent City Council*

## **"Scoping Projects (How "do change control" became an ITIL Implementation Programme)"**

Projects should be clearly scoped, identifying what will be delivered by whom and when, in addition to why where and how. ITIL presents the "Where are we now – where do we want to be" model. This demands strong up-front project planning to enable an organisation to answer all the relevant questions before starting. Prince 2 provides a methodology for organisations to adopt and adapt, however, many of the principles of project management are missed from both ITIL & Prince. This presentation will help to address the key project start up points and improve your ITIL Implementation's success rate.

*Brian Davies & Salley Ames, Yell*

## **"Describing the route from no process to the point where invocation was almost seamless!"**

The story of Service Continuity at Yell is one of improvement by stealth. Business Continuity and Disaster Recovery are areas that nobody really wants to embrace and still expect to be there when required. Our approach is to build the

# mentum" – Early Booking Offer!

speakers that have been accepted to present at the Annual Conference and Exhibition in November. They have focussed primarily on User and programme will be released in June within the Early Booking Brochure and full details will be published in the Final Brochure in the have focussed on People, Culture, Global considerations and experience, Change, Configuration and SLA's.

confidence of each business area in the ability of Service Continuity to fulfil their needs in times of trouble. We started with simple tests which had little or no impact on business performance and have built to a position where our target-related Telesales teams are keen to be involved in these tests, doing "live work" in a recovery situation. This presentation will take you through the journey to date, resulting in our highest ever audit rating for one of our ITIL processes.

**Bob Austin, Barclays Bank**

## **"Service Assurance and Sarbanes-Oxley working together"**

The emerging need to comply with the Sarbanes-Oxley act is challenging a number of UK companies who are listed on the New York Stock Exchange. This has driven a need to risk assess processes and services to identify the key control points which could affect the financial reports. Given the Pamalat event, this type of rigour will soon be demanded by the EC. What effect is this likely to have on the role of the service manager? How do we turn this mandatory requirement into a value added service proposition? How much effort does this require?

**Andrea Igl & Bernd Heckmann, O2 Germany GmbH & Co**

## **"Transforming IT Operations into IT Service Management – a Real Life Success Story"**

In the context of several saving and improvement initiatives O2 Germany's IS department realised that the ambitious target of reducing IT service cost while taking on board additional services and improving the service quality would need a profound basis. Triggered by a group-wide initiative (mmo2 plc) to optimise IT Service Management O2 Germany started introducing the ITIL best practice framework in April 2003. In the first phase processes with highest priority for the outsourcing partner interfaces were redesigned and new – process based – contracts established. In September 2003 the project started to introduce all of ITIL Service Management processes plus

some areas from BS 15000.

**Tassos Alefantos, Athens International Airport (AIA)**

## **"Enabling a Smart Airport"**

AIA's IT&T Operations has an impressive record of a successful airport opening and 3 years of operation based on ITIL and gained EFQM's "Recognised for Excellence". The presentation will cover the operational concept, the set up, the challenges, the tools and the use of COBIT-ITIL-EFQM to achieve operational excellence.

**Ray Paice, UK Hydrographic Office & Sue Shaw, Tricentrica**

## **"What do you use your CMDB for?"**

2003 was a time of great uncertainty for ITS at the UKHO. An internal market had been introduced, outsourcing was on the cards and key staff were leaving. Outsourcing was seen off but promises had to be kept! ITS set about an ambitious internal improvement program – based on actually achieving a CMDB and had to become a lot smarter at operating within the Internal Market. And as if that wasn't enough ITS took the lead in developing 'joined-up' service management with other internal service providers, such as Site Services. In April 2004 the UKHO's Service Delivery Team covering IT, Site Services and Human Resources was launched, all operating within the Internal Market and with a consolidated service catalogue underpinned by a new cost/charge model. Follow on plans are to run all charging from the CMDB, develop on-line service request ordering and self-help facilities. This session should appeal to a wide audience, some elements revisit ITIL basics whilst others are leading edge.

**Steve Murby, Royal Mail & Mike Faragher, Xansa**

## **"ASSAM – Generating and Maintaining change and innovation for Legacy Applications"**

In 1998 Royal Mail Group had a number of Ingres applications which were being supported in four operational areas.

Ingres was already deemed to be non-strategic but was underpinning business critical systems. Royal Mail Business Systems recognised that there were opportunities to make changes and savings but struggled to gain business commitment. Using Xansa plc, Royal Mail First Class Supplier of the Year 2002, substantial savings of over 25% were achieved through proactive Service Management. Now whilst the portfolio of applications have reduced, Royal Mail Group have been able to enjoy a flexible service, and continued productivity improvements. This Presentation will discuss how this has been achieved by continually reinvigorating the service.

**Maggie Kneller, AXA UK**

## **"Service Assurance: Eradicating the Development/Production Divide"**

During her career, she has seen IT from both sides of the development / production 'divide', and has always wondered why a divide needs to exist. She is sad to say that, even now, in the 21<sup>st</sup> century, the development / production divide is as strong as ever. Developers lob systems across the chasm as they run away to their next project, without any concern for whether the new system operates adequately or provides the users with the required service levels. Why don't developers think about the end product, are they only concerned with the process of developing? Why don't the business customers think about the service levels they want until it's too late to provide them, are they only concerned with the functionality of the system? What can we do, as service management professionals, to ensure that systems are delivered into production fit for purpose, providing the business customers with the service levels they expect? How can we engage the business and the developers to consider this an important system deliverable? This is about 'Service Assurance', a concept to eradicate the divide between development and production, and how this has been implemented in AXA.

For further information – [www.itsmf.com](http://www.itsmf.com)



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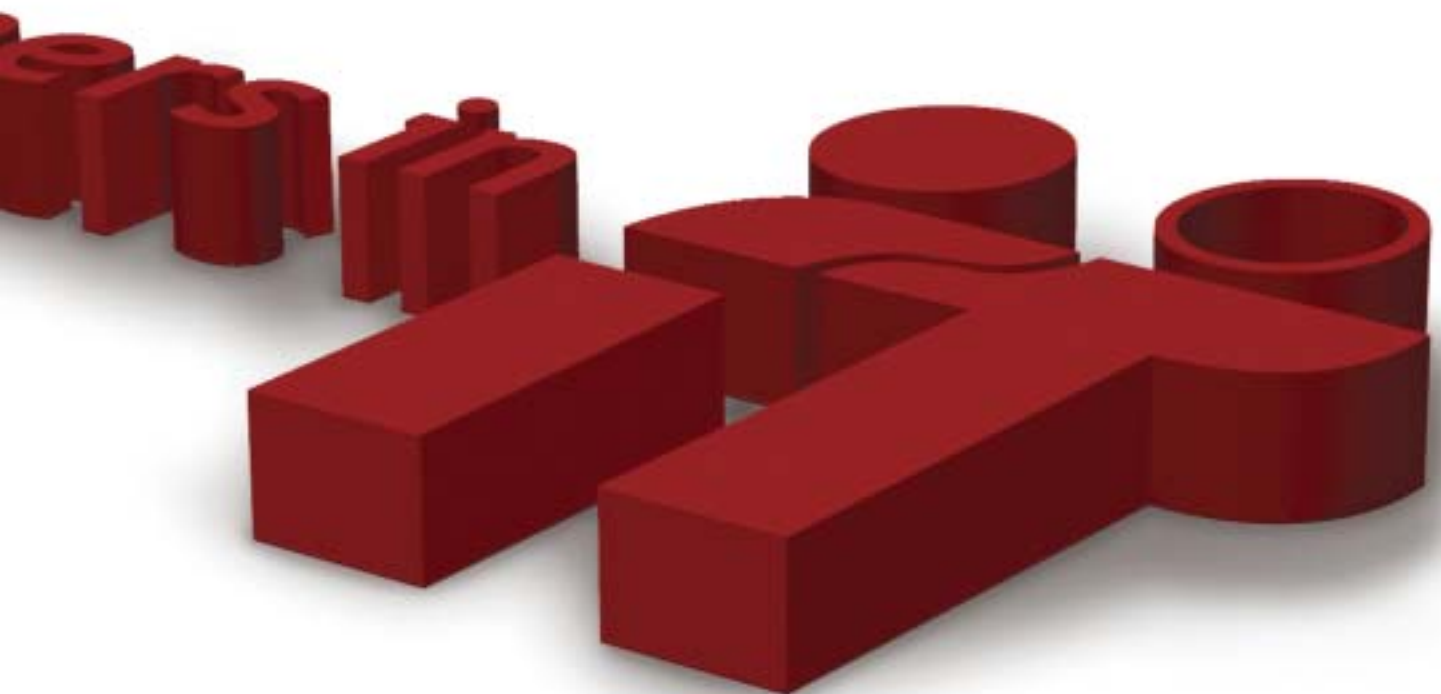
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# Ask the Experts

## QUESTION 1

**My company is beginning an initiative to introduce ITIL best practice into its service management processes. The company wishes to appoint an IT Service Delivery Manager, how should we go about finding the right person in a cost effective way?**

## ANSWER 1-1

**Barry Corless, Sysop**

Toeing the party line here we should start by mentioning the member facility available through the member area of the website at [www.itSMF.com](http://www.itSMF.com) – it says Jobs & People. You can advertise your job on there – all you need to do is be a member of *itSMF*. Whilst the number of jobs on there is low the hit rate of the site is high and you can rest assured the browsers are all ITIL converts. OK, so what do you mean by cost effective? You don't want to pay a recruitment agency a small fortune is one definition and you'd quite like your chosen one to have a 'reasonable' remuneration package. I'd say getting the right person is likely to be far more important than saving a couple of grand on an agency fee. That can be wiped out by one poorly implemented change causing unscheduled overtime or call out payments. So my drive is to look at the person specification you need and not to waste time and effort on unsuitable candidates. If you are producing literature you can try to make sure the right candidate applies by clearly stating what you are looking for within it. Let's take the fact that your candidate is ITIL qualified as read, a senior position so red badge is preferable. What you will certainly need in the stage you are at, the start of the ITIL journey, is above all somebody with drive and enthusiasm. Nothing can stall an implementation like a leader who is not service quality and customer focused. They must be prepared to take a few blows as initial implementations only show gradual improvements (or even none at all) and not the step changes you had promised and still 'come back fighting'. You may rate experience in the same industry sector as important, particularly if you are subject to heavy regulation. Is proven ITIL implementation experience

important? Given the wealth of organisations who can (for a small fee) help you, choosing and managing the right partner for the journey may be the key tasks your Service Delivery manager has to perform. In conclusion, only by knowing what you want will you make the right cost effective decision.

## ANSWER 1-2

**Madeleine Barnard, Foster-Melliard (South Africa)**

Your first step is to understand what this person's job function should really be. Don't stare blindly into "implement ITIL Disciplines within the organisation". Even though this could be his/her primary objective, what is it really that you need them to do (eg manage a team; raise the level of service; manage services according to SLAs)? ITIL will obviously be important, but you need to figure out in the true sense of the word what your expectations will be. Once you have done that, put your people criteria together – i.e. specific "soft" skills that your candidate should have. In some areas of ITIL these are outlined briefly, but once again I would rather suggest that you consider these skills within your organisational context. To advertise the position, I would go to specific ITIL resources – I believe as an *itSMF* member you are able to advertise positions on their website – this means that you hone in on those with ITIL experience, and interest – probably the most cost effective way to get who you want.

Perhaps advertising your requirement on your own website could also be very cost effective... make sure though that you add the right meta tags so search engines can pick it up easily. The main point, however, when it comes to doing this cost effectively is to ensure you understand your expectations from the position first! And get closer than just introducing ITIL.

## ANSWER 1-3

**Tony Price FISM, PinkRocade**

There are two key considerations: either train someone up to do the job or recruit someone from the external market.

### Option (1)

If you want to train someone up to do the

job then I would recommend that they go through the formal ISEB/ EXIN accredited education. This formal education should ensure an appropriate understanding of ITIL best practice and mixed with the internal knowledge of your organisation can result in a strong candidate. However gaining the formal qualifications is just the start. Ideally you want someone with real practical experience. This may be difficult and hence drive you to option (2). If someone with this experience does not exist within your company but you still want to follow option (1) then you should look for a mixture of the following skills and experience:

- Excellent interpersonal skills
- Strong customer service skills
- Process skills (for example, modelling, design, ownership etc.)
- Excellent all round IT experience (not just focused on a single technology / platform)
- Excellent understanding of how your IT supports the business and the impact on the business from IT failure
- Financial Management experience / understanding
- Management of Change experience / awareness

There are many other additional attributes you would consider, but with the above and the formal ITIL education, this should help to select / develop the correct person for the role.

### Option (2)

If you decide to recruit someone into the role you are again faced with further options. There are now numerous job agencies who supply ITIL resources. A search on the web will prove this to you. However I would start at the *itSMF* website and consider advertising on here (it is free for members who wish to advertise vacancies).

However simply getting a CV is just the start. Ensuring they are the right person is something very different. I would recommend that you produce a list of mandatory requirements (something like the points highlighted in option 1). I would also define salary that you are prepared to pay. You will then be able to

eliminate numerous CV just by running through these requirements. It may also be the case that you really do not fully understand at this point what the role will ultimately comprise of / have responsibility for. Hence you may wish to consider bringing in an Interim Manager who can establish the role, document the requirements and even help you with the selection of permanent replacements.

Just one last point, in my experience I have found numerous people with Service Support skills, however the Service Delivery skills are not as common place. Hence if your IT Service Delivery Manager is to follow ITIL best practice, you may be looking for skills that are not that common in the market. Hence you must be realistic in both your requirements and salary expectations.

**NOTE: Karen Ferris, KMF Advance (Melbourne, Australia), has also submitted an answer. This can be found on the website at [www.itsmf.com/](http://www.itsmf.com/).**

## QUESTION 2

**Our primary objective is to save lives and as a service manager within the organisation what I do appears to be far removed from this. How do or can I relate my performance measures to this objective?**

### ANSWER 2-1

**Ian Clark, Foster-Melliard (South Africa)**

Firstly allow me to congratulate you on attempting to align yourself and your activities as a Service Manager with the objectives of your organisation!!

As a Service Manager I am assuming (which I know can be dangerous) that you are responsible for ensuring IT services are provided to the business and they are of a high quality, available as and when required and appropriately supported. I believe one of the major challenges facing organisations adopting ITIL best practices is how they structure themselves to accommodate the process led approach. The second challenge and one that I believe is equally as important is, how do I align and measure the personnel working within the IT department to both the ITIL approach AND the objectives of the business? Today IT Professionals are faced with KPIs, KPAs, Performance Matrices, Balanced Scorecards (and the list goes on) and these can

be pages long and very skill specific (i.e. Database Administrators, Unix specialists, Network administrators etc). Whilst performance measurements surrounding specific skill sets are required, surely so is the input and adherence to agreed processes and procedures.

Would it not also make sense that the objectives of an individual are aligned with the objectives of the IT department he/she works within. In turn these objectives are aligned ultimately to meet the objectives of IT as a whole. This "cascade" approach must obviously support the goals and strategy of the business. An example of a business that has the objective of saving lives would be a hospital. Within the hospital there is an ICU (Intensive Care Unit). The ICU would be viewed as a VBF (Vital Business Function) within any hospital and the nurses working within the ICU work to stringent guidelines and procedures when caring for patients (i.e. Business Processes). In the ICU these business processes have to be followed and in a majority of cases require the use of technology and IT services supplied by the IT department.

I would hope that there are SLAs in place between the IT department and the ICU on the provision and support of this technology and IT services. There should be documented and agreed OLAs and UCs in place with both the internal and external parties involved in supplying these services specified in the SLA.

I firmly believe the crucial aspects with regards to the provision of IT services before we even start looking at the measurement of individual performance are:

- Understanding what the business perceives to be an IT Service
- IT must ensure that it clearly understands how this service is delivered to the business, end to end and at component level
- IT must also ensure it is aware of the criticality of the service being available to the business

This information must be documented, agreed and be available to all staff. In essence the above information could be held in an internal IT Service Catalogue and fall under the necessary Change & Quality control applied to all other documentation. The above sounds so obvious that you would imagine that

every IT department would hold this information!! So, back to performance measurement. Keeping the above in mind, as a Service Manager I would expect to be measured mainly on my ability to provide and improve service to the ICU as defined within the SLAs. The many other staff involved in delivering service should also be measured against their input into achieving the targets specified in the OLAs & UCs. A few of the measures likely to be included in OLAs & UCs would be:

- Incident response and resolution targets
  - Availability of infrastructure components collectively delivering service to the ICU
  - Component monitoring to ensure capacity thresholds are not breached
- The strange thing is that the above and many more of these "measurable" activities can be and usually are performed by BOB the Network Technician and are critical to the delivery of services required by the ICU. If BOB understands this and meets these performance measurements then I believe BOB is also saving lives.

### ANSWER 2-2

**Graham Dawson MISM and Gerry Gough MISM, Fujitsu Services**  
Organisations use IT services in order to support their business processes and objectives to a greater or lesser extent.

It may appear at first glance that the activities and tasks you perform are far removed from the primary objective of saving lives. However, since IT Service Management is concerned with delivering and supporting IT services that are appropriate to the business requirements of the organisation, your activities must be contributing to the primary business objectives – if they're not, ask yourself why you're doing them in the first place.

So, how do you go about understanding and defining the link between IT service and the business? Firstly, you must identify and understand the key business processes that are supported or enabled by the IT services you provide. For each of these business processes you will need to identify the key performance targets that the business has defined. These performance targets will normally be focused on the primary objective for the business organisation (in the case of your ►

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organisation, this primary objective is “saving lives”).

Once you have identified the business processes and their performance targets, you should then identify the specific IT services that support the business. From these, you should be able to identify what your IT services must deliver in order fully to support the business performance targets and objectives. This should then give you the basis for establishing performance measures – both process and personal – that relate to the primary object of “saving lives”.

**NOTE: Barry Corless, Sysop and Karen Ferris, KMF Advance (Melbourne, Australia), have also submitted answers. These can be found on the website at [www.itsmf.com/](http://www.itsmf.com/)**

### QUESTION 3

**Our IT department has recently adopted ITIL and to complement this we undertook to do IT audits along the ITIL framework. Due to the inter-dependencies of ITIL, it appears difficult to limit our audit to just the one dimension and overwhelming to tackle the entire list in one hit. Not all our ITIL processes are mature, so how do you carry out ITIL audits in an evolving organisation? I am told we wouldn't have this problem at all using a CoBiT approach.**

### ANSWER 3-1

**Dave Bingham FISM, Fujitsu Services**

Good to hear you have adopted ITIL – and fantastic to hear that you plan to measure performance as you go! I'm also right with you when you say that the various disciplines or dimensions of ITIL are interdependent. I regard this as a good thing, as I'm sure you do. So, how do you measure against a moving target and wouldn't CoBiT be easier?

Taking those questions in reverse order, I'd say no, CoBiT doesn't solve this problem because CoBiT and ITIL are complementary but fundamentally different in nature. If ITIL is a hammer then CoBiT is the toolbox where the hammer and other tools slot together. So while CoBiT will never give you a sore thumb, it's rubbish at knocking nails in!

So that leaves us with the real question: how do you measure ITIL compliance as

your journey towards compliance develops? I'll assume that by 'ITIL audits' you mean some assessment of ITIL compliance either carried out in-house (self-assessment) or by a consultancy (independent assessment), not a formal audit against new British Standard 15000 by an accredited auditor.

As someone who has carried out a great many independent assessments I don't think they need to be 'overwhelming'. A dozen structured interviews feeding answers into a properly designed and weighted spreadsheet, followed by a little analysis by someone experienced should provide a fairly detailed snapshot of your current state. Clearly it makes no sense to repeat this exercise frequently *during* service improvement initiatives but it is invaluable to carry it out *before* they start and once they have been completed. Then you get a baseline to measure improvements against and the incremental improvement achieved by each major initiative.

So, this would be my suggestion if you have a programme of initiatives planned and want to check progress at each stage:

- Perform a full audit at the beginning to establish a baseline
- Repeat just the *relevant* parts of the exercise at the end of each initiative (i.e. if the only thing you have worked on since the baseline is your Service-desk then you could legitimately re-audit only your Incident Management and Problem Management at that point)
- Do a major audit after any foundational initiatives such as the introduction of Configuration Management which impact so many of the ITIL disciplines
- Repeat the full audit at the conclusion of the programme to set a new baseline
- Go and celebrate your (demonstrable) success!

Happy ITIL'ing!

### ANSWER 3-2

**Barry Corless, Sysop**

Forget the theory for a minute. Let's get a true to life slant on this. Sure, at this point in time, I should really start explaining how CoBiT, ITIL, Six Sigma, EFQM, CMM and Uncle Tom Cobbleigh are all designed to be complementary (in most cases). Indeed, it was the focus of

Aidan Lawes' session at the Help Desk Show in London recently.

Let us take reality check here. Let us think CREDIBILITY. You have committed to ITIL and processes based around it. Now is almost certainly not the time to be thinking about alternative approaches. What will the business think? What will the IT staff think? I'll tell you “Another bl\*\*\*y methodology, when will they ever make their minds up”. How many people truly see the various methodologies, frameworks and quality standards as complementary outside of the champions of each? More importantly, how many organisations have genuinely integrated them, especially ones that are just embarking down the ITIL path? I'm a great believer that you are as 'ITIL compliant' as you need to be to meet the goals of your organisation. You can lose focus on the **customer** if ITIL compliance is your only goal. So early on what can we do? Well as ITIL is all about adapt and adopt you do the same.

There are always going to be the generics that you will audit about any process. Does the process have an owner? Is it signed off? Is it documented and available? Does it have KPIs? Is it subject to Change Control? Are there roles specified within the process? At an early stage, they are all crucial to helping to give you a fighting chance of success. Two final ones are integration with other processes and ITIL compliance. I've been through the OGC self-assessments with many organisations and we have found that, for example, they fail on Incident Management if they have no Service Level Management as a feed for targets, goals and reporting. So you end up with some big gaps. Now look at what your customers are telling you. It may be that you do not have to plug all those gaps immediately and you can prioritise actions. What you will likely find is that an area where IT or customers believe the service is weak maps directly on to one of the areas you 'fail' on in the assessment. The moral of the story is that failure can indeed be good. I am reminded of the work I did for a customer in the finance sector who much like you were evolving. They had a 'gut feeling' that Incident Management was working but communication was weak. The OGC questionnaire confirmed this and gave them areas they could attack in ▶

small manageable chunks. My advice can be summed up by saying, do not be afraid of scoring low marks, concentrate on your customer and use ITIL to balance what they want with what you can deliver.

### ANSWER 3-3

*Gary Hodgkiss, CGEY*

You do not state which areas of the framework you have adopted, and to what degree, however several Review and Audit options are available to you, each of which can be tailored to multiple dimensions or views. The key is to recognise the goal of the audit, and to define boundaries that address this goal – if necessary audit the activities performed end-to-end across Process boundaries, as opposed to the Process structure inferred by ITIL, i.e. simply focussing on Change Management process may miss some key activities which achieve compliance from within Release or Deployment.

OGC offer Self Assessment questions covering Service Support and Service Delivery, and a multitude of consultant firms have produced audit tools and measurements for organisations undertaking such activity. BS 15000 also provides a clear breakdown of all processes into auditable questions (See PD0015 Workbook). The point which interests me the most however, is the mention of CobiT, and the inference that it is an alternative (or often mis-represented as conflicting) to ITIL. In reality the adoption of both within large organisations presents a comprehensive process based IT Control & Governance Framework, which can also be scaled to fit Small to Medium Enterprises also.

Both OGC's and ISACA's view is that ITIL is effective as the delivery mechanism for the governance and control practices defined within CobiT, or simply put: CobiT is the **what**, ITIL is the **how**. Some 18000 possible touch points can be mapped between CobiT detailed control objectives and ITIL / BS 15000 guidance. The adoption of the CobiT control and governance approach does not simply give you a one off audit snapshot but an ongoing R&A solution that is part of the IT operation culture.

OGC and ISACA continue to align the frameworks with plans to make available further information, case studies, and guidance to practitioners and auditors throughout this year. A strong driver for business in today's environment is Corporate Accountability and compliance with regulations such as the Sarbanes-Oxley Act 2002, where IT self assessment and assurance comes top on the agenda of senior board members.

Using CobiT also helps to focus the audit onto the specific IT processes and controls that are significant by linking the CobiT control framework back to business requirements. This can then subsequently help to focus which parts of ITIL are most significant to include. Additionally, the maturity modelling approach in CobiT will help to identify where the major gaps are for each significant process, thus also helping to focus on where to spend the most effort during an audit and also for improvement planning.

*NOTE: Tony Price FISM, PinkRoccade, has also submitted an answer. This can be found on the website at [www.itsmf.com/](http://www.itsmf.com/)*



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# Making the Leap

**Steve Morgan**  
*Fox IT*

In order to carry out a Service Improvement Programme you can read the ITIL books, attend training courses and bring in consultancy to assist you, and many organisations do just that.

One of the first aspects is often to concentrate on the process design, creating process architectures, process and data models. They have extensive experience of Visio and Word, and are all keen to produce these documents as part of their process design and implementation. We've all seen those huge process diagrams adorning the walls of the office, which explain how things should be done by the use of colourful, eye-catching diagrams.

But how do these documents "make the leap" into operational use?

The answer to this question needs to be asked by any organisation seeking to implement any of the processes. Without the answer, we will be doomed to Visio diagrams that adorn the walls of our offices, supported by Word documents that never see the light of day until the next routine audit or assessment. But how do we actually make it "work"?

The following points will hopefully go some way to helping your processes "make the leap".

**1. Involve** – those intended to be performing the process with the initial process design to ensure buy-in and commitment. Get agreement with the high level design, and involve them in creating it. They need to understand where they fit in, and exactly what changes to their operational work will be required once the new process goes live.

The process should be tested with real-life examples, and those staff involved in the process should ensure that they understand what will be coming to them, when, from whom, and exactly what they should be doing with it when it gets there.

**2. Document** – ensure that the process is documented to an adequate level of detail. A single Visio diagram is totally inadequate unless it is supported by documentation that describes what goes on in each process flow box. It is not advisable to copy the text straight from the ITIL books, but to tailor the explanatory text so that it fits in with the organisation's standards, and most importantly, it contains simple and concise instructions on who does what.

**3. Define** – roles and responsibilities. Every one needs to understand what they need to do at each stage in the process in order for it to be performed effectively. When your process diagram has an input or output from/to another process ensure that those involved understand their responsibilities.

Each process should have an owner, who is responsible for maintaining that process under change control, as well as being responsible for the measurement and on-going improvement of the process over time. Each process should also clearly identify specific role holders, together with revised job descriptions if those roles are going to change.

**4. Bite size chunks** – don't bite off more than you can chew. Adopt a phased approach to process implementation, which gives adequate time to check compliance by those involved, whilst ensuring that minor tweaks can be made as you go along. For example, Configuration Management can be a mammoth task, but the requirements of the process need to be prioritised against the business need, and a suitable implementation plan drafted, which has clear achievable targets.

**5. Business As Usual** – a process which is seen as "the latest management initiative", "just a bit more work" or "too bureaucratic" or even worse, as a "bolt-on to all the other stuff we do" will never be successful. We mustn't lose sight of the fact that a process is just an agreed

list of activities that shows *how we do things around here*, and as such should become engendered as business as usual.

**6. Keep the Pressure On** – avoid the Catharine Wheel effect at all costs. You know how we all gaze in awe for a few moments and are all then left with that empty feeling! We must continually check that the process is being adhered to by implementing measures and KPIs. The process owner should collate and publish reports that show how well the process is performing and should be driving and publicising process improvements that are ongoing.

**7. Assess and Improve** – all IT processes should be assessed at least annually, maybe by internal audit groups if that luxury exists, or through self-assessment using the various tools and workbooks available on the Internet, or by engaging a professional assessment body to undertake the audit independently. It is imperative that process maturity is measured regularly.

**8. Communication** – we must communicate with each other to ensure that the finished process is practical and can be easily followed, without being seen a bureaucratic. Furthermore we must ensure that the process meets the needs of the business. We should discuss IT's overall performance with the business on a regular basis and use their feedback to identify where specific processes are falling short of their objectives.

We all agree that documentation is necessary, particular if we are to provide a reference point for our staff, and perhaps looking to comply with BS 15000 audit standards at some point in the future.

However, we must be able to demonstrate that we are complying with these processes, and this can only be achieved through ensuring your processes "makes the leap" from this documentation into operational use. ■

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At the recent HITS show, the white paper, commissioned by HDI and sponsored by Hornbill, and based on an on-line survey, was published. So what did it have to say, and what can we learn from it? My first reaction was to write to the author to point out the omissions, ambiguities and apparent bias in the questions. It almost appeared as if a negative answer was being solicited. On reflection, I decided to wait and see what transpired.

Despite the inherent flaws in the survey, the results were overwhelmingly positive, as the following headline quotes demonstrate:

- ITIL adoption shows a real improvement in service levels
- More than half of adopting companies measured a distinct improvement in customer satisfaction
- ITIL benefits staff. Not only does their competence increase, but so does their job satisfaction
- In nearly 75% of the cases, ITIL can be implemented with the same or ultimately fewer staff
- 20% of adopters acknowledged that it had given them competitive advantage in the business market
- 82% of organisations adopting ITIL said they would recommend it
- 64% said ITIL was worth every penny and 70% said ITIL gave a worthwhile return for the effort/expense.

However, some of the other conclusions demonstrate that there is still a huge degree of misunderstanding about what ITIL is – and isn't. Some of these conclusions are discussed below. But first, let's address a more fundamental issue. By the very way in which the survey has been approached, it is treating ITIL as though it is an end in itself. It isn't. What any enterprise should be striving for is an effective, high-quality Service Management solution that ensures that the business processes of the enterprise are supported and enabled in the necessary manner at an acceptable cost. ITIL is simply a "tool" to help the enterprise achieve this goal. So, we should really be focusing on the quality of the whole Service Management solution – not on a means to that end.

*"... it is by design, a methodology, not an industry standard to which companies can adhere – but 63% of adopting companies still expect it to be a standard."* Wrong, on 2 counts. ITIL is

# "The ITIL Experience – Has it been worth it?"

*A review by*  
**Aidan Lawes**

not a methodology. It is non-prescriptive guidance that organisations need to adapt and adopt to their specific environments and requirements. And, while it is sometimes referred to as a "de facto" standard, it will never become a "de jure" one. The main reason is because there is a formal standard that has been developed based upon the ITIL guiding principles. BS 15000 is part of the same continuum – it specifies those requirements that a quality Service Management solution must exhibit. It has just been adopted by Standards Australia as AS8018 and work is in progress to move it to an ISO standard.

"ITIL is an IT matter only." For many of us who have been involved with Service Management for many years, this is precisely why many initiatives fail or prove unsustainable. Admittedly, the business side won't (or shouldn't) be particularly interested in what approach, framework, methodology and/or tools are being used in the IT shop, but they must understand what Service Management is all about and what their role is in the overall solution.

*"Despite all the processes mentioned in ITIL, it remains incomplete."* I have a certain sympathy for this statement, but for totally different reasons than in the survey. In the survey itself, only certain of the Service Support and Delivery processes are identified – and no account is taken of any of the other ITIL publications. Drilling down into the report reinforces this feeling of selectivity, as among the "missing" processes quoted are Infrastructure Management (ICT Infrastructure Management), Customer Relationship Management (Business Perspective) and Release Management (Service Support).

Some of the other "processes" quoted are

"Staff Training & Development", "Customer Satisfaction Monitoring via on-line survey" and "Improved communication". ITIL does mention all these as being activities that need to be undertaken, but there are a myriad of ways in which they can be tackled and there are many publications that address these areas. In areas such as these, ITIL doesn't try to reinvent the wheel – nor to focus on any particular approach where it is always going to be organisation – dependent as to how such aspects are handled.

Thus, while we continue to identify certain aspects of Service Management where more advice and guidance could be given and develop ITIL accordingly, most of the items identified in the survey really seem to indicate a less-than-complete understanding of ITIL.

However, there were some other quoted conclusions that are consistent with the message that *itSMF* has been promoting for the last dozen or so years, namely:

- The size of the company is no limit to the adoption of ITIL.
- Clear goals and a consistent pursuit of them are critical if the desired benefit is to be achieved.
- Benchmarking prior to implementing improvements is essential
- There is no single way of "being ITIL compliant"... the concept of "compliance" being irrelevant.

On reading some of the detailed comments in the report one of the major issues we all face is the very success of ITIL itself. As it becomes more widely adopted and more individuals seek training **and qualifications**, commercial drivers start to distort the picture. Higher demand for training often leads to a reduction in the quality of training and a focus on passing examinations rather than education aimed at engendering true subject understanding.

So, overall the survey shows a generally positive consensus about the value to be derived from ITIL-based Service Management solutions – even if there is a degree of misunderstanding about exactly what ITIL is. A clear message for us in the *itSMF* – we must keep preaching the right, consistent messages to ensure that people focus on the goal (Service Improvement) and not the means to it. ■

# International News

The International Executive Board met in Oslo at the end of March following a very successful Norwegian conference. Key points that were agreed upon were:

- A separate legal entity will be established for *itSMF* International. It will be registered in the UK, under the same basis as the UK organisation.
- Pending the acceptance of a final business plan, the UK office will continue to administer International matters.
- A proposal that all global membership fees should be paid into the International funds was accepted and will be put to the full board for ratification.
- Brazil was formally accepted as a member.

## New Chapters

Progress continues to be made in China, Hong Kong and Singapore as well as in Hungary and Poland; New Zealand has formed a steering committee. A number of organisations in Saudi Arabia have expressed interest, including several major user companies. If all the countries in progress come to fruition, there will be more than 30 chapters by the year end.

## Current Chapters

Just a reminder of who is part of the community already: Australia, Austria, Belgium, Brazil, Canada, Denmark,



*All points on the compass – the International Executive meet in Oslo, Norway*

France, Germany, Italy, Japan, Netherlands, Norway, Portugal, Romania, South Africa, Sweden, Switzerland, UK and USA.

Contact details for all chapters are in the Global section of the [itsmf.com](http://itsmf.com) website.

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# ISEB Service Management Examinations



## ...from an Examiner's viewpoint

**Dave Jones**

*ISEB Service Management Examiner*

Arrive home from work and there it is, on the table, laid out all innocent and calm. Better have a drink before looking at it. No, just get on with it, don't be such a wimp! No, a drink first.

What causes such consternation and bewilderment? The brown jiffy bag from the ISEB, that's what. It's that time again; the time when we mark ISEB examination papers. The time when even the dog stays out of my way. Still that's what I signed up for. So I open the bag and the cycle starts again.

Before we get to this stage though there is a lot of work that has already been done; especially by the candidates. All those course hours and then the self-study. Then six hours spent doing something that is a little alien to most of us these days, writing with a pen. When it's all completed off it goes to the ISEB.

The ISEB, where would we be without such stalwarts? They sort, copy, staple the papers together and then put them in these jiffy bags to send out to the examiners. Considering the number of candidates and the number of pieces of paper a remarkable job well done (so Stef Venn, ISEB Examinations Manager, tells me). Then a few weeks later collating and sorting the marking matrices that the examiners return so that the candidates get their results (Stef says another good job).

But what of the marking experience? A few hours or days spent trying to read the copied papers and trying to match what

has been written against what was expected. Handy hint for candidates ***“Read the question to understand it before you read it to answer it”***.

Most times what was written matches what was expected. Sometimes even exceeding expectation. Handy hint for candidates ***“Answer the question you have been asked not the one you wanted to be asked”***.

Occasionally the writing is “not all it could be” which takes a little edge off all the excitement. Makes it more thrilling trying to decipher it though. Still when all is said and done, the candidates are under pressure.

Eventually though, the papers are marked and now comes the time when my marking partner and I compare scores and notes. We only have a small margin for difference and so the discussion can sometimes take quite a bit of time. However, we eventually arrive at an agreed score for the candidates and these are sent off to the ISEB with the (unfortunate) failure reports. Yes, there are some failures I'm afraid and for each question that a candidate fails we have to complete a report. Nothing startling – just an indication of why, in the examiner's opinion, the candidate did not reach the required level. Useful feedback for the candidate hopefully. Aside for candidates; the use of phrases like, “This candidate is depriving a village somewhere of an idiot”, are not allowed.

The agreed marking matrices and any

papers that need a third marker are taken to the Examiners' Panel meeting where the overall experience of the session is discussed with a view to improving things next time. These meetings have been known to take some time and even get a little heated in the discussions. However, the chairperson, David Wheeldon, does a sterling job in keeping everyone in order and eventually the scene gets set for the next session.

Handy hint for candidates: I know it seems a lifetime from when you sit the examination until you get the results, but the examiners and the ISEB really do our best to keep the time as short as possible. There is just so much to do and so little time.

However on we go. One session over and the next to look forward to in only a very few short weeks. Can't wait.

My thanks go to the ISEB for their hard work in getting the examination sessions, papers, venues, copying and post together. My thanks go to my colleagues without whose tireless efforts the examination papers would not get marked and to David Wheeldon for being himself. Finally, my thanks go to you the candidates without whose desire for knowledge, skill and qualifications my life would be so much simpler, but not half as much fun. ■

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# IT Physician Heal Thyself

## Unified Process Management Framework

### 'The Way Forward'

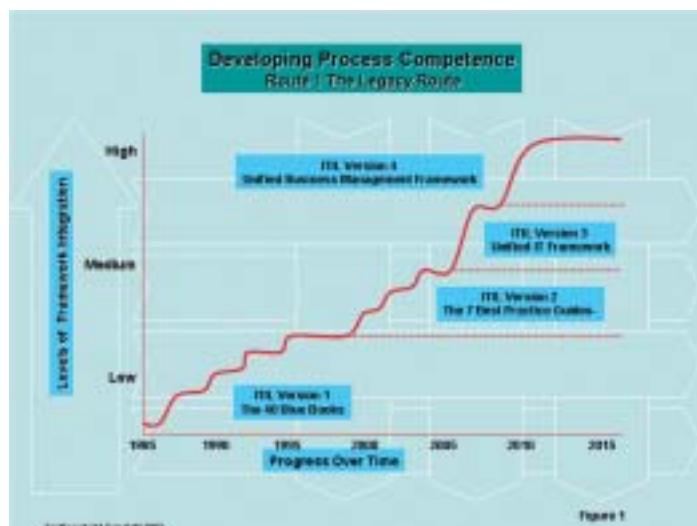
**John Gibert**  
*Southcourt*

**This is the last in the series of articles on 'IT Physician Heal Thyself'. We finally look forward to see how IT management processes should develop over the next ten years with the emergence of business driven management process frameworks which will enable IT to operate as an integral part of the business. The articles have focused on ITIL, which has evolved over the last twenty years to provide comprehensive publicly available advice on IT management best practice. ITIL has helped IT management address the cultural divide between IT and the business by making IT 'Business Service Focused' and helping IT management move from being technology and applications solutions driven. ITIL has moderated the technology push, where IT constantly pushes 'Solutions looking for Problems'.**

#### ITIL Past and Future

In the last twenty years, ITIL has been through two versions. Version 1 was started in the mid 1980's and saw the emergence of advice spread over some 40 'Blue Guides'. Much of their content was revised and republished in the early 2000's as the current 7 ITIL publications, where the scope has gone way beyond infrastructure management into overall IT management.

There are some plans to improve the current ITIL guides, with the prospect of ITIL version 3 being out in some 2 to 3 years time providing clearer and more integrated advice on best practice. The chart below shows a potential development path for ITIL, with a version 4 that integrates IT into the business so that ITIL becomes 'BITIL' – a business IT management framework.



The concepts and contents of the suggested ITIL version 3 and version 4 are explained in this article

#### Summary of the Previous Articles

Looking back, the series of articles assessed the current state of IT management processes and tools. They identified that in the future there must be a better way of managing IT and a much better way of managing IT in a business aligned manner.

The proposition made in the articles was: that IT was suffering the 'Cobblers Children's Shoes Syndrome' – it had shod the business with ERP enabled integrated business processes; but had not shod itself by providing 'ERP for IT'. It is clear that IT management have not seriously contemplated integrating IT management processes. In the IT Physician metaphor: IT has not taken its own medicine to create a uniformly managed function with unified processes and integrated IT support.

The articles reflected upon the way that IT is managed today with IT using its own management processes to operate in an insular manner, with the business on the outside of IT. Alignment with the business is through interfaces and contact points, and not through integration of management processes with the business.

The articles reflected on some key IT Management Domains including: IT Service Management; IT Project Management; IT Applications Management; IT Infrastructure Management and IT Strategy & Architecture.

They examined the host of frameworks providing advice on best practice including: ITIL; MOF; PRINCE2; ASL; BSD/SSADM; RUP; DSDM; ISPL; IS-7799 and COBIT to name but a few. Each of these frameworks have been developed separately and in parallel by different groups of IT professionals, each with their different outlooks and in the process each have created silo mentalities.

The frameworks were not designed to align with one another and so they don't. Many large IT departments have and are spending millions of dollars – trying to implement and integrate these IT disciplines to make IT work 'End to End'.

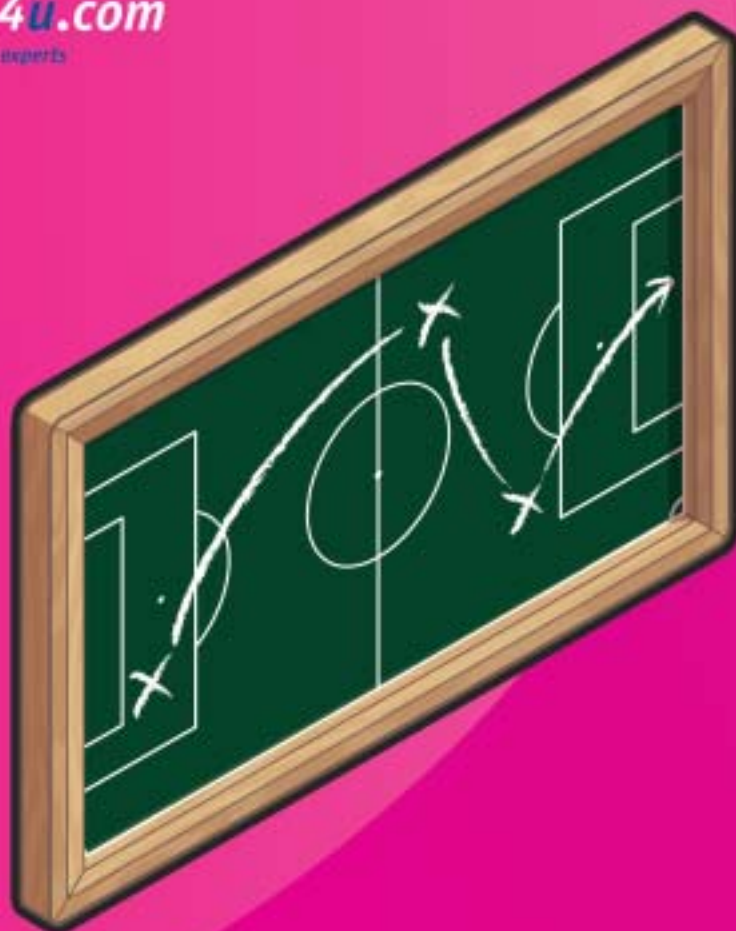
#### The Unified Management Process Framework

The previous articles introduced the concept of Unified Management Process Framework (UMPF) which has been



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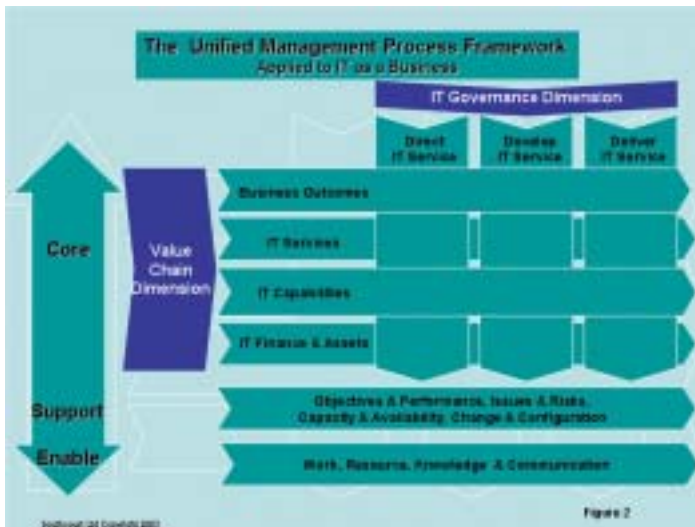
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developed to be a 'Framework of Frameworks'. It provides a logical structure into which all the best practices within the individual frameworks can be assembled in a structured and consistent manner, so that Business-IT management processes are truly 'End to End'. The UPMF framework is summarised in the diagram below and briefly explained.



- The four dimensions of UMPF were explored in the second through to the sixth articles covering:
- The two dimensions of the 'Core UMPF Processes' interact with one another - the 'Governance Dimension' overlays the Value Chain Dimension to provide 'End to End Matrix Management'.
  - The 'Support Dimension' provides common management processes for handling activities like Risk, Change and Performance Management performed in a common manner across IT and the business.
  - The 'Enabling Dimension' provides Work, Resource, Communication and Knowledge Management processes used consistently across the business.

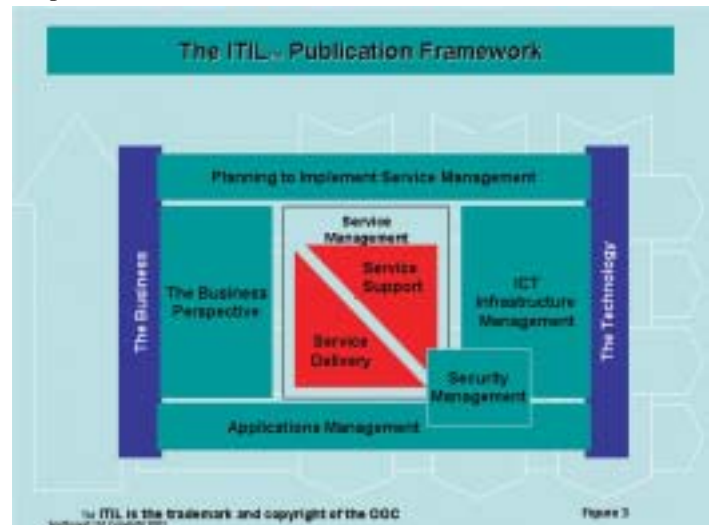
### Technology Futures

The prospect for IT technology over the next ten years is for accelerated deployment of IT. It is not unreasonable to expect a twenty fold increase in the deployment of IT components within ten years.

Also businesses are looking for agility in being able to adapt application functionality to support constantly changing business processes. They are looking to take direct control of applications functionality, but recognise an ever increasing dependency upon IT infrastructure, where they are looking for capacity and availability 'On Demand'.

Businesses are in prospect for a new generation of application software that enables business people to configure and adapt workflow and information processing, to meet the ever changing process needs, in an agile manner.

With all of this happening, how will we be managing IT in ten years time? The simple answer is in a more integrated service focused manner with best practice the norm facilitated by a new generation of flexible ERP systems for IT that are agile and adaptable.

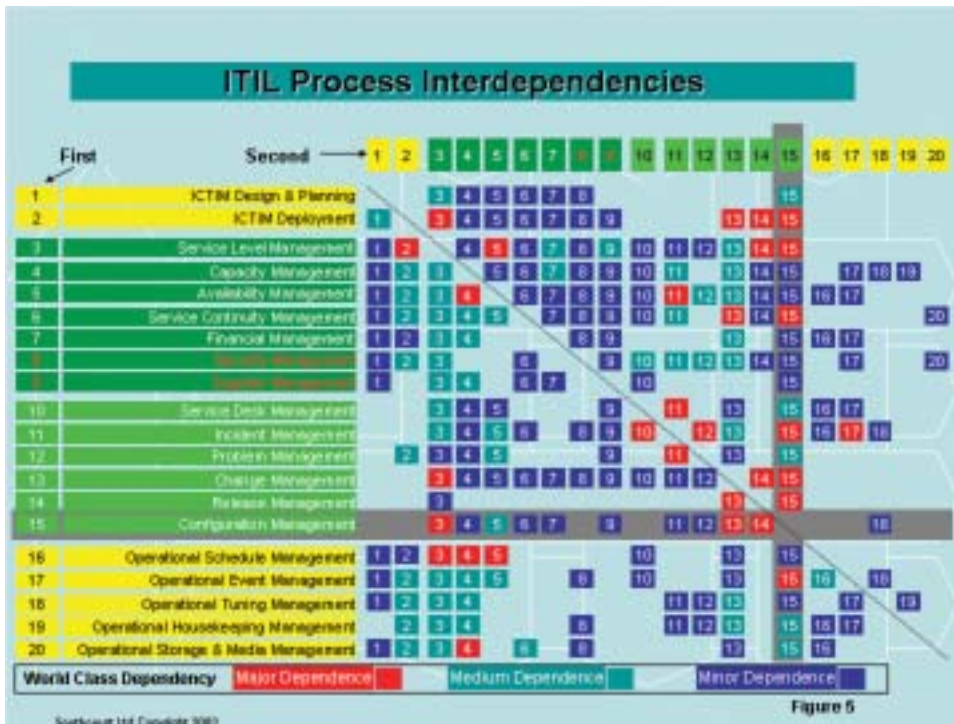


### ITIL Version 3 – ITILv3

So can we do this with ITIL version 2? The answer is no. ITIL version 2 is full of anomalies and inconsistencies. It was developed without a blueprint by an army of individuals. The ITIL publications admit to there being problems between the individual guides which are like loose overlapping Teutonic plates, as in the diagram below, rather than as pieces of a tightly fitting jigsaw.

At a high level ITIL version 2 is poorly structured. If we relate the ITIL guides and put them into a layered diagram, known as the 'ITIL Onion Diagram', we can see that 'ICTIM Operations Management' is the central layer with Service Support the next layer. 'Service Delivery' in the next layer, which is then surrounded by the project elements of Infrastructure and Applications management and finally encased in the strategic elements of Infrastructure and Applications Management.





The problem with all IT management frameworks is that they work with the business on the outside. They are not business management frameworks where IT is just part of the business (see Figure 6 below).

So ITILv4 will not be an IT Management Framework but a Business Management framework. Clumsily we might think of it as 'BITIL' – 'Business IT Infrastructure Library'. That is where UMPF comes in because UMPF is ITILv4 or BITIL.

Many people in the IT Service management community recognise that Service Management is not specifically about IT, it is about business. In the same way that ITIL may become BITIL by version 4, so the *itSMF* may become the BSMF – the Business Service Management Forum.

ITILv3 needs to provide a rationalised process picture with a more easily understood structure. The layers in the process onion will help.

There are so many interfaces and dependencies across the ITIL processes, as illustrated below, that IT can only work in a world class manner where those interfaces and dependencies are well understood and integrated (see above Figure 5).

Configuration Management is highlighted – number 15. You can see with the horizontal bar there are many processes that it is dependent upon, and the vertical bar where there are an even greater number of processes that are dependent upon it.

So ITILv3 needs to provide us with a rationalised process structure, but it also needs to provide clearer process pictures with an effective process notation.

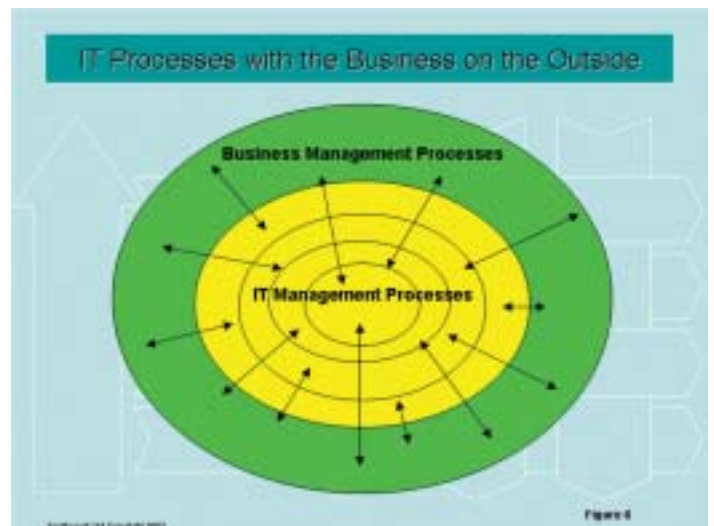
What more is needed for ITILv3? Well there are a lot of areas that need review and clarification: Service Requests; Service Catalogues; Standard Changes; versus MOs; for starters

Also the whole myriad of IT databases needs to be rationalised. Rather than fragmenting IT's management data, it needs to be integrated into one data model covering the CMDB, the CDB, the ADB and way beyond.

ITILv3 needs to take into consideration related management frameworks including COBIT, Six Sigma, Balanced Score Card to name just a few. There appears to be as many ITIL consultants currently investigating these as there are implementing ITIL?

### ITIL Version 4 – ITILv4

A lot needs doing to get ITILv3 into shape, but will that be enough? The answer is no, because ITILv3 will still be an IT framework with the business on the outside, and that will not be world class in 2010.



As has been said elsewhere in these articles IT has got ahead of business management thinking in the development of management frameworks and associated management disciplines to deal with the complexity of IT.

IT can and should share its best practices with the business and should adopt some business best practices especially around manufacturing processes, where IT has a lot to learn from MRP3 in the areas of requirements and resource planning and control, workflow and information management.

### ERP 4 IT

BPR needs to be applied by the IT industry to enable ITILv3 and ITILv4. IT needs to move out of its silo operation, away from functional processes and beyond domain processes, as illustrated in the diagram overleaf – Figure 7.

The reality is that the amount of BPR needed within IT and across IT and into the business is substantial to overcome significant resistance to the major cultural shift required.



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Ideally you'll already hold the Managers Certificate in IT Service Management. Successful candidates will be capable of working alone or as part of a proactive team and will be willing to travel.

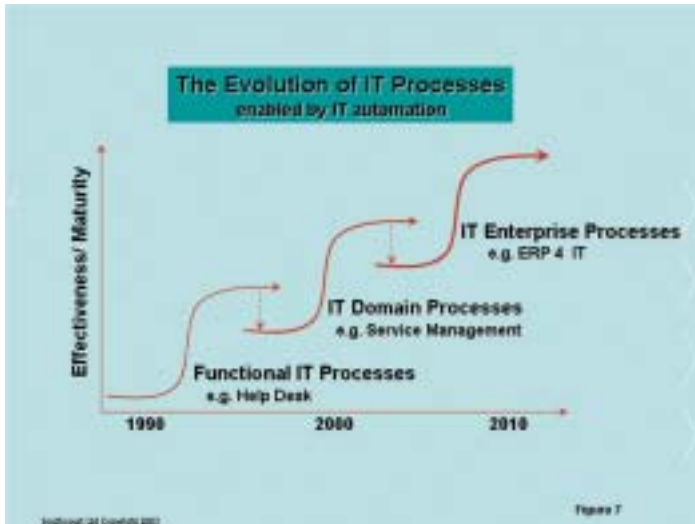
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- Service Management – for Service Delivery and Support activities
- Systems Management tools – for Infrastructure Management and Operations Automation.

With ITILv4, IT managers and professionals will find they work in a more disciplined environment with common enabling processes of work and knowledge management, working in a controlled manner similar to the way people work everywhere else in the business.

The IT Physicians will have to deliver and take their own medicine.

### The Way Forward

The *itsmf* and its members are in a position to influence the development of ITIL. The scope and thrust of ITILv3 (and ITILv4) is up to the *itsmf* community to define. The OGC will no longer be alone setting the agenda.

The series of seven articles is being brought together as a book with additional material to flesh out some of the details of the ITILv3 & 4 and UMPF. It is due in Q4 2004. ■

*If you would like to influence the author's thoughts on ITILv3 and ITILv4, or would like further information on UMPF please contact the author John Gibert at John@be-st.co.uk*

The current IT tools vendors need to develop their products to work across the business and IT domains with the key being adaptable workflow and an integrated flexible business IT management database.

The myriad of set piece 'departmental level' IT solutions all need to be integrated to provide ERP 4 IT, namely:

- Professional Service Automation – for development and project related activities

# servicetalk

## Deadline Dates

Issue	Copy Deadline	Advertising
August 2004	Tuesday July 6 <sup>th</sup>	Thursday July 8 <sup>th</sup>
October 2004	Tuesday September 7 <sup>th</sup>	Thursday September 9 <sup>th</sup>
December 2004	Tuesday November 2 <sup>nd</sup>	Thursday November 4 <sup>th</sup>
February 2005	Tuesday January 4 <sup>th</sup>	Thursday January 6 <sup>th</sup>
April 2005	Tuesday March 8 <sup>th</sup>	Thursday March 10

## Advertising rates

As from February 2004

	<i>itsmf</i> Vendor Members	Non-Vendor members
1 x Full page	£450	£650
1 x Half-page	£275	£425
1 x Quarter page	£150	£250

A 10% reduction is available if a series of 6 adverts is booked and paid for in advance. **Contact publications@itsmf.com to book advertising.**

**Disclaimer** Articles published reflect the opinions of the authors and are not necessarily those of the publisher or his employees. While every reasonable effort is made to ensure that the contents of articles, editorial and advertising are accurate no responsibility can be accepted by the publisher for errors, misrepresentations or any resulting effects.

## Thinking about submitting an article?

Articles should be between 1200 – 1500 words in length, and in PC compatible format.

## File Formats for Photos or Graphics

Any accompanying photographs need to be high resolution files (300dpi). Graphics need to be supported by the separate original files in which they are created – not just a copy of the Word document. Ideally these files should be created in a high quality programme such as Photoshop (as a 300dpi TIF file or JPG file for colour material or BMP file for mono material), or in Illustrator (as a high resolution EPS file).

Articles should be emailed to publications@itsmf.com as an attachment to an accompanying email detailing the topic of the article

# Diary 2004

Date	Meeting	Venue	Comments
June 3	Management Board	Reading	
June 10	South West & Wales Regional Group Meeting	tba	
June 17	Institute of Service Management Meeting	Reading	
<b>June 29</b>	<b>itSMF Seminar: BS 15000 Seminar “From the Horse’s Mouth”</b>	<b>Reading Renaissance Hotel</b>	
June 29	Vendors ESC Meeting	Reading	
July 5	Services ESC Meeting	Reading	
July 7	Midlands & East Anglia Regional Group Meeting	tbc	
July 8	Publications ESC Meeting	Reading	
July 20	BS 15000 ESC Meeting	Reading	
<b>July 23</b>	<b>itSMF Japan Conference</b>	<b>Tokyo</b>	
<b>July 28</b>	<b>itSMF Seminar: Business Continuity and Risk Configuration – “Danger UXB!”</b>	<b>Birmingham Britannia Hotel</b>	
<b>August 2- 4</b>	<b>itSMF Australia Annual Conference</b>	<b>Melbourne</b>	
September 1	Scottish Regional Group Meeting	tba	
September 2	Management Board	Reading	
September 9	South West & Wales Regional Group Meeting	tba	
<b>September 9</b>	<b>itSMF Canada Annual Conference</b>	<b>Toronto</b>	
<b>September 16</b>	<b>itSMF Seminar: Seasonal Trends</b>	<b>Leeds</b>	
September 21	BS 15000 ESC Meeting	Reading	
<b>September 27 – 2 October</b>	<b>itSMF USA Annual Conference</b>	<b>Long Beach</b>	<b>ITSM: Beyond the Foundation, Building the Future</b>
October 6	Midlands & East Anglia Regional Group Meeting	tbc	
October 7	Publications ESC meeting	Reading	
<b>November 8 – 10</b>	<b>itSMF 13<sup>th</sup> Annual UK Conference &amp; Exhibition</b>	<b>Brighton Metropole</b>	<b>“Creating &amp; Maintaining the Momentum” — Book Early!</b>
November 24	Scottish Regional Group Meeting	tba	
December 2	Management Board & Council of Members	Reading	
<b>December 7-8</b>	<b>itSMF Germany Annual Conference</b>	<b>Hamburg</b>	
<b>December 8</b>	<b>itSMF Seminar Change Management</b>	<b>London</b>	
December 9	South West & Regional Group Meeting	tba	

# *itSMF* Forthcoming Seminars

The IT Service Management Forum

## BS 15000 – “From the Horse’s Mouth!”

29 June 2004 Reading

Everyone seems to want to know about BS 15000 and plenty have their own view, but what is really happening? The *itSMF* is the owner of the certification scheme and it would seem sensible to hear the facts, as it were “*From the Horse’s Mouth!*” In this seminar we will dispel any misconceptions about the standard and put you and your organisation on the right track. You cannot afford to “bury your head in the sand” and ignore BS 15000 – within the UK and the international community, organisations are using it to gain a competitive advantage and as a result it will go from strength to strength. One thing is certain – it will not go away! So, come along to find out the truth about BS 15000. We are in the process of putting the final touches to a programme that will include:

- BS 15000 The Standard Explained
- BS 15000 Certification Explained
- An Auditor’s Role and Experience
- A User’s Role and Experience
- Is BS 15000 for You? – Benefits and ROI
- How Important is the Scope?
- Integration with other standards

## Service Continuity – “Danger UXB!”

28 July 2004 Birmingham

*Why are you lucky if you find an unexploded bomb?  
Because it did not go off before you found it!*

Here are two UXBs to consider:

- [1] Could you have an application or service lurking unknown or not regarded in your organisation that is paramount to the business – one that if it exploded could seriously damage or fatally wound your business? – No? – How do you know?
- [2] We have the technology and processes and IT generally gets pointed at to ensure continuity but what does that mean? Do you consider just ITSCM or more Business Continuity Management? Is the business aware of what it is you are taking responsibility for? And what your are not? Who is to fill the gaps?

In this seminar we will look at plugging the gaps and being proactive in addressing service continuity – finding your potential UXB! The programme will also consider:

- Service Continuity as part of End to End Service Management
- Protecting Information and Business value
- The role of Service Desk and Incident Management
- Management of Risk – Business Impact Analysis
- Can you afford not to invest?
- Is there any return on investment?
- Getting the Buy-In – Maintaining Profile/Awareness

Please check the website for a list of speakers and associated synopsis.  
Recent Seminars organised and run by the *itSMF* have been extremely successful and so we suggest you consider booking early to avoid disappointment.

Finally, future seminar topics are being considered.  
Is there a subject matter that is becoming a burning issue?  
Please email us at [events@itsmf.com](mailto:events@itsmf.com) with your suggestion.