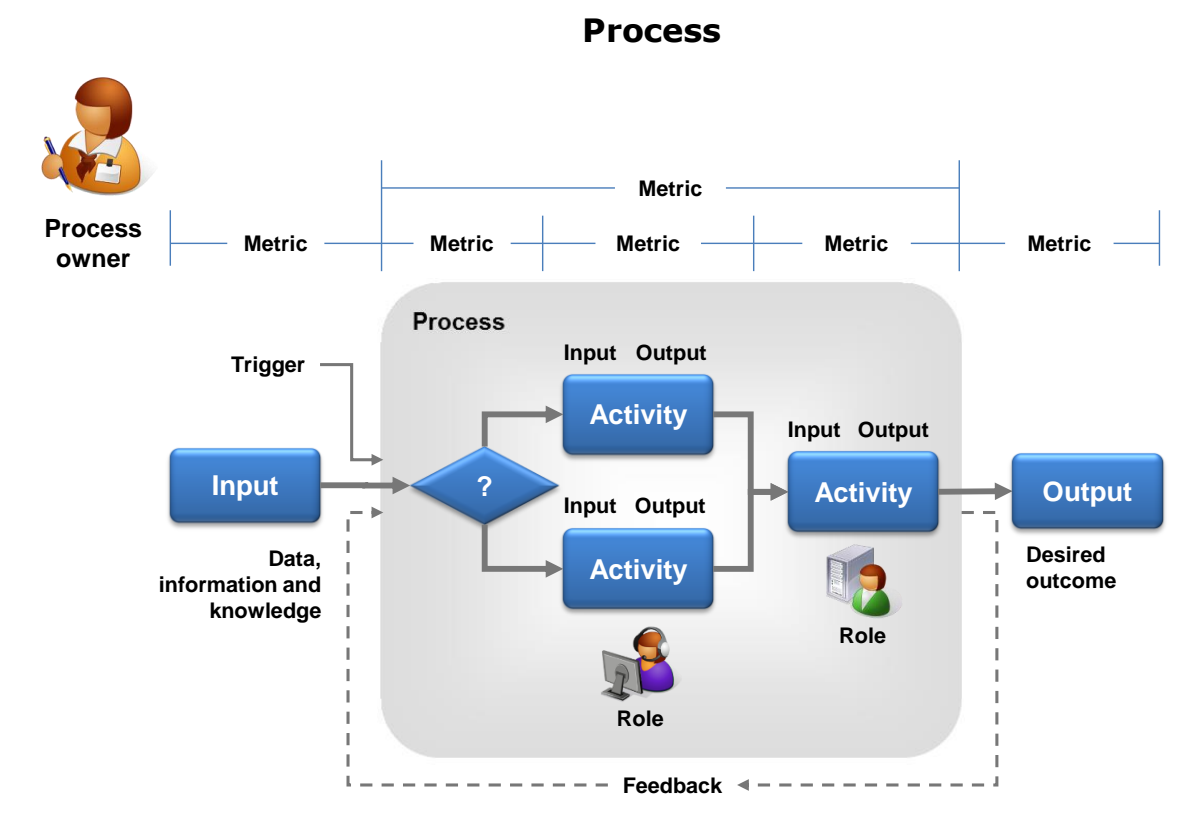
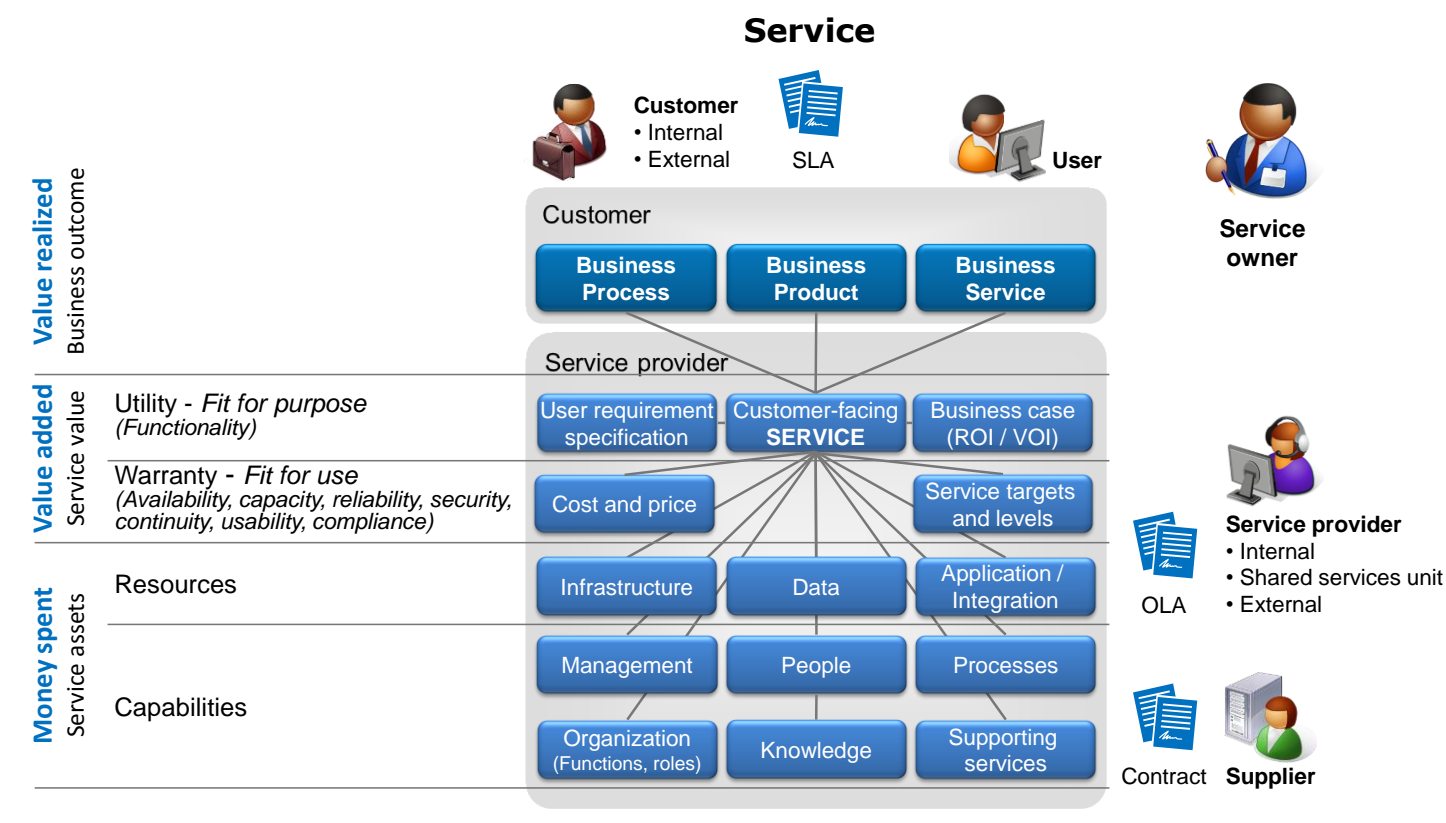
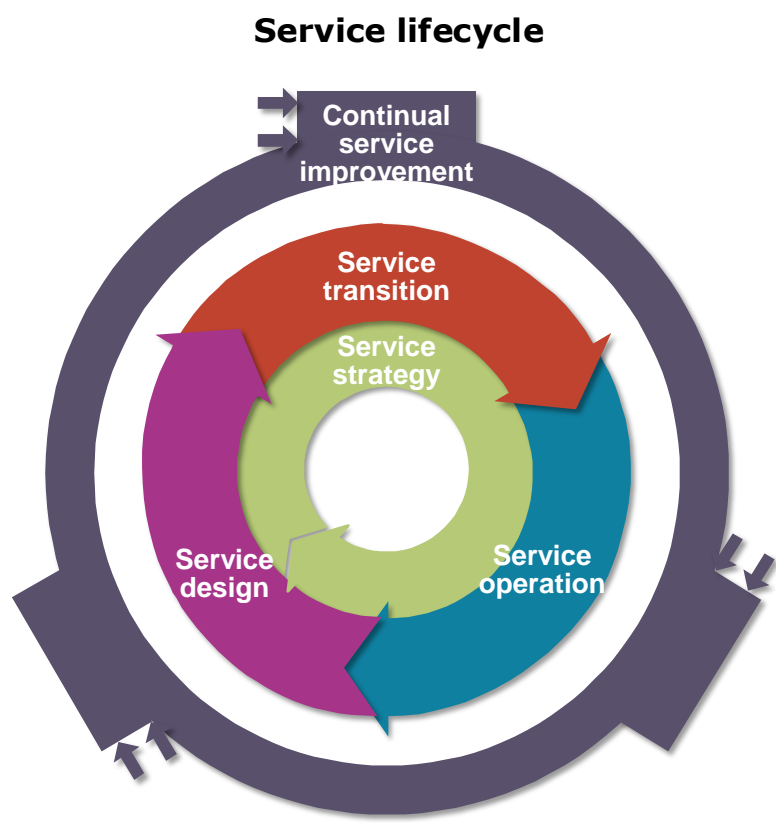


ITIL® 2011 – The big picture



Service strategy

- ✓ Determine perspective
- ✓ Form a position
- ✓ Craft and execute plans
- ✓ Adopt patterns of actions

Key principles

- Service management as a strategic asset
- Internal and external customers
- Core, enabling and enhancing services
- Value: Business outcomes, perceptions and preferences
- Functionality (utility), performance (warranty) and price
- Service packages
- Sourcing strategy
- Value networks

Strategy management for IT services

- Perform strategic assessment
- Generate strategy
- Execute strategy
- Measure and evaluate

Demand management

- Identify sources of demand forecasting
- Analyze and codify patterns of business activity (PBA)
- Match user profiles (UP)
- Manage activity-based demand
- Develop differentiated offerings (Service packages)
- Manage operational demand

Service portfolio management

- Define
- Analyze
- Approve
- Charter

Business relationship management

- Handle requests
- Handle complaints
- Identify opportunities
- Manage business relationships throughout the service lifecycle

Financial management for IT services

- Identify and track costs and income (Accounting)
- Budget
- Charge

Key documents

- Vision and mission statements
- Strategies, strategic and tactical plans and policies
- Service requirements
- Service charter
- Service definitions, classification and visualization
- Service models
- Service packages
- Option space
- Cost model
- Financial information and budgets
- Business cases
- Business impact analysis (BIA)
- Patterns of business activity (PBAs)
- User profiles (UPs)
- Stakeholder definitions

Service design

- ✓ Plan and prepare
- ✓ Collect requirements
- ✓ Analyze
- ✓ Design
- ✓ Review and revise design
- ✓ Evaluate alternative solutions
- ✓ Procure and/or develop

Key principles

- Five aspects of holistic service design:
 - ◆ Service solutions for new or changed services
 - ◆ Management information systems and tools, especially the service portfolio
 - ◆ Technology architectures and management architectures
 - ◆ Processes
 - ◆ Measurement methods and metrics
- Balanced design:
 - ◆ Functionality
 - ◆ Resources
 - ◆ Schedule
- IT service design vs. business change
 - ◆ People
 - ◆ Processes
 - ◆ Products (services, technology, tools)
 - ◆ Partners (suppliers, vendors)
- Service oriented architecture
- Design constraints
- Service delivery options and strategies

Service catalogue management

- Agree and document service definition and description
- Agree service catalogue contents
- Produce and maintain service catalogue
- Interface with stakeholders

Service level management

- Determine and agree requirements and make SLAs
- Monitor and report service performance
- Improve customer satisfaction
- Review and revise SLAs and underpinning agreements
- Develop relationships
- Maintain framework and templates

Supplier management

- Define requirements
- Evaluate suppliers/contracts
- Establish suppliers/contracts
- Manage performance
- Renew and/or terminate
- Categorize suppliers and maintain SCMS

Availability management (Reactive and proactive)

- Monitor, measure, analyze, report and review
- Investigate and isolate
- Assess and manage risk
- Implement countermeasures
- Plan and design
- Review and test

Capacity management (Business, service and component)

- Pre-empt capacity issues
- Model and trend future needs
- Plan individual designs
- Optimize/improve capacity
- Assess, agree and document requirements
- Plan new capacity

IT service continuity management

- Initiate project
- Determine requirements and produce strategy
- Develop plans and implement strategy
- On going operation
- Invoke the continuity plan

Information security management

- Produce and maintain information security policy
- Implement security policy
- Assess and classify information assets and risks
- Impose and review security controls
- Monitor and manage security breaches and incidents
- Reduce security breaches
- Regularly assess, review and report security threats

Design coordination

Overall:

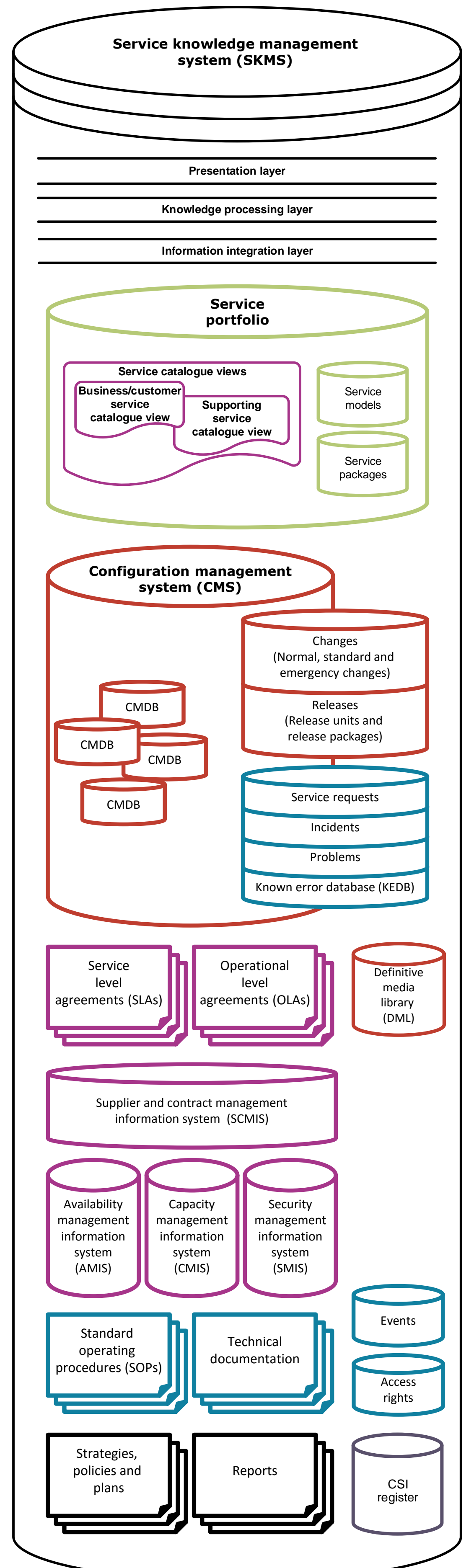
- Define and maintain policies and methods
- Review current capabilities
- Plan design resources and capabilities
- Coordinate design activities
- Manage design risks and issues
- Improve service design

For each design:

- Plan individual designs
- Coordinate individual designs
- Monitor individual designs
- Review designs
- Handover service design packages

Key documents

- Service design policies and plans
- Service acceptance criteria (SAC) and service level requirements (SLR)
- Service definitions
- Service catalogues
- Service design package (SDP)
- Solution designs
- Architectures & standards
- Processes
- Measurement and metrics
- Service level agreements (SLA), Contracts and operational level agreements (OLA)
- Service reports
- Availability policy, plans, design criteria, risk analysis and reports
- Capacity policy, plans, workload analysis, forecasts and reports
- Business and IT service continuity policy, strategy, plans, risk and business impact analysis and reports
- Business and information security policy, strategy, plans, risk analysis, classification, controls and reports
- Supplier and contracts policy, strategy, plans and reports
- RACI matrix



Service transition

- ✓ Plan and prepare
- ✓ Build and test
- ✓ Train and pilot
- ✓ Transfer, deploy, retire
- ✓ Review and close

Key principles

- Policies for service transition
 - ◆ Manage all changes through service transition
 - ◆ Common framework and standards
 - ◆ Re-use
 - ◆ Business driven transition
 - ◆ Stakeholder relationships
 - ◆ Effective controls and disciplines
 - ◆ Knowledge transfer
 - ◆ Release packages
 - ◆ Resource planning and management
 - ◆ Early involvement
 - ◆ Quality management and improvement
- Big bang vs. phased
- Push vs. pull
- Automation vs. manual
- Data-Information-Knowledge-Wisdom
- Managing people through service transitions

Release and deployment management

- Plan release and deployment
- Build and test release
- Deploy (deploy, transfer, retire)
- Provide early-life support
- Review and close

Change management

- Create and record request for change (RFC)
- Review RFC
- Assess and evaluate change
- Authorize change build and test
- Coordinate change build and test
- Authorize change deployment
- Coordinate change deployment
- Review and close change record

Service asset and configuration management

- Manage and plan
- Identify configuration
- Control configuration
- Perform status accounting and reporting
- Verify and audit

Service validation and testing

- Manage validation and test
- Plan and design tests
- Verify test plan and test design
- Prepare test environment
- Perform tests
- Evaluate exit criteria and report
- Clean up test environments and close

Transition planning and support

- Define transition strategy
- Identify service transition lifecycle stages
- Prepare for service transition
- Plan and coordinate service transition
- Advice
- Provide administration
- Communicate
- Monitor and report progress

Knowledge management

- Define knowledge management strategy
- Transfer knowledge
- Manage data, information and knowledge
- Use the service knowledge management system (SKMS)

Change evaluation

- Plan evaluation
- Evaluate predicted performance
- Evaluate actual performance

Key documents

- Service transition strategies, policies, plans and budgets
- Service packages
- Service design package (SDP)
- Service acceptance criteria (SAC)
- SLAs, contracts and agreements
- Change and configuration management policy, plans and reports
- Change models
- Requests for changes (RFC) and change records
- Change schedules and plans
- CAB agenda & minutes
- Configuration models
- Configuration baselines, status reports and audit reports
- Release policies, plans, notes, packages and documentation
- Service quality policy, risk policy, test strategy, test models, test plans, test reports and known errors
- Build plans and documentation
- Evaluation plans & reports
- Deployment plans and reports
- Service transition report
- Knowledge management strategy

Service operation

- ✓ Monitor and control
- ✓ Manage services, components and activities
- ✓ Optimize
- ✓ Report

Key principles

- IT services vs. technology components
- Stability vs. responsiveness
- Quality vs. cost
- Reactive vs. proactive
- Involvement in other service lifecycle stages
- Operational health
- Communication
- Documentation

Request fulfillment

- Receive request
- Log and validate request
- Categorize request
- Prioritize request
- Authorize request
- Review request
- Execute request model
- Close request

Incident management

- Identify incident
- Log incident
- Categorize incident
- Prioritize incident
- Perform initial diagnosis
- Escalate incident
- Investigate and diagnose incident
- Resolve and recover incident
- Close incident

Access management

- Request access
- Verify request
- Provide rights
- Check and monitor identity status
- Log and track access
- Remove or restrict rights

Problem management

- Detect problem
- Log problem
- Categorize problem
- Prioritize problem
- Investigate and diagnose problem
- Find a workaround
- Raise a known error
- Resolve problem
- Close problem
- Review major problem

Event management

- Generate event notification
- Detect event
- Log event
- Correlate and filter events (1st level)
- Categorize event
- Correlate events (2nd level)
- Select response
- Review actions
- Close event

Common service operation activities

- Monitor and control IT operations
 - ◆ Console management
 - ◆ Job scheduling
 - ◆ Backup and restore
 - ◆ Print and output management
- Facilities and data centre
 - ◆ Technology
 - ◆ Mainframe
 - ◆ Server
 - ◆ Network
 - ◆ Storage and archive
 - ◆ Database
 - ◆ Directory services
 - ◆ Desktop
 - ◆ Mobile devices
 - ◆ Middleware
 - ◆ Internet/Web

Key documents

- Service operation policies and plans
- Operational requirements
- Event management policy, plans and reports
- Incident management policy, plans and reports
- Major incident procedure
- Request fulfillment policy, plans and reports
- Request models
- Problem management policy, plans and reports
- Problem models
- Information security policy, plans, classification, controls and reports
- Processes
- Technical documentation
- Operational procedures and instructions
- Functional documentation
- User guides



Continual service improvement

- ✓ Plan
- ✓ Do
- ✓ Check
- ✓ Act

Key principles

- Continual service improvement approach
- Organizational change
- Ownership, roles, and responsibilities
- Knowledge management
- Service measurement
- IT governance

Seven-step improvement process

1. Identify the strategy for improvement
2. Define what you will measure
3. Gather data
4. Process data
5. Analyze information and data
6. Present and use information
7. Implement improvement

Common improvement techniques

- Assessment
- Gap analysis
- Benchmarking
- Service measurement
- Metrics and scorecards
- Service reporting
- SWOT
- Return on investment

Key documents

- Continual service improvement policies and plans
- Corporate and IT vision, mission, goals and objectives
- Critical success factors (CSFs)
- Key performance indicators (KPIs) and metrics and achievements
- Service level targets and achievements
- Balanced scorecard
- Service improvement plans (SIPs)
- Business cases
- Reporting policies and rules
- Reports and dashboards

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