White Paper

ITIL Implementation Planning

Overview

Introduction   This paper describes the items that need to be considered in advance of starting an ITIL implementation effort. It is critical to make sure that the implementation effort is well organized. Certain project management basics need to be in place to make sure that a solid improvement foundation is underway and operating.

Assumptions   It is assumed that a Program Office or Core Team has already been established that will be leading the ITIL implementation effort.

First Meeting   It is recommended that the Program Office or Core Team hold a first formal meeting to develop a consensus on how the items listed in this paper will be addressed. Key participants at this meeting should include:
- Program Office Project Manager
- Core Team Participants
- Implementation Subject Matter Experts as necessary

Considerations   It should be a Program Office responsibility to ensure all the items described in this paper are kept current.

At the start, some of the items may not be completely filled out, but will evolve over time.

Overview, Continued

Items to Be Addressed

The remainder of this paper describes what items need to be considered. A summary of the items needed to be put into place before the implementation effort gets underway is as follows:

- Program Working Tool Standards
- Program Organization Chart
- Team Training Strategy
- ITIL Overview Presentation
- Program Overview Presentation
- Program Master Plan
- Program Issues Log
- Status Reporting Templates
- Program Risk Mitigation Strategy
- Program Meeting Calendar
- Work Product Delivery Map
- Program Terminology Guide
- Program Working Standards
- Stakeholder Initiatives Inventory
- Stakeholder Map
- Program Baseline Metrics
- Program Document Repository
- Security Clearances
- Email Distribution Lists
- Kickoff Meeting Presentation
- Work Products Review Procedure
- Work Product Templates
- Program Governance Process
- Process Modeling and Documentation Standard

First Meeting Items to Plan For

Program Working Tool Standards

For each item listed in this document, a working standard needs to be identified. This standard should identify the tool(s) to create and maintain the item (i.e. PowerPoint, Project, Excel, etc.). Make sure that tool versions are also included.

It is recommended that a list of the items in this document be assembled in a table and have the appropriate tool(s) listed alongside them for easy reference.

Program Organization Chart

A Program Organization Chart or list needs to be developed that identifies all known participants. This chart will be owned by the Program office. Key elements of the list include:
- Name
- Department
- Program Role (i.e. Core Team, Advisor Team, etc.)
- Location
- Contact information

Team Training Strategy

Each participant in the Program should be reviewed as to their current level and understanding of ITIL concepts within the role they will play. For example:
- Process Owners will need to fully understand the best practices for the processes they represent
- Stakeholders may need only a basic level of knowledge of ITIL concepts.

A strategy should be developed for each participant to address how the appropriate skills we be put into place.

ITIL Overview Presentation

Needed to explain basic ITIL concepts and why they are being used with the Program. Should be no more than 1 hour in length. Used to help bring stakeholders and others on board that need to have knowledge of ITIL concepts.

First Meeting Items to Plan For, Continued

Program Overview Presentation

Needed to explain Program goals, objectives and approach. This should be at high levels and not delve into great detail. The presentation is to be used for making new stakeholders and other parties aware of what the Program is all about as well as how the Program is structured and operated. Should not be more than 1 hour in length.

Program Master Plan

A working version of the Program Work Plan should be finalized as the Master Plan. The Program Master Plan is basically a work plan document that includes tasks, roles, effort estimates, milestones and key timeframes.

For larger efforts, it is not unusual to have many sub plans that will roll up into a single Master Plan.

Program Issues Log

A master log kept by the Program Office that lists Program Issues. Elements of this log should include:
- Program Issue Title
- Issue Status Category (Open, Pending, Closed, etc.)
- Issue Owner Name
- Description
- Priority (High, Medium, Low)
- Issue Open Date
- Current Issue Status Description

Status Reporting Template(s)

Templates should be developed for how Program members will document Program status. It is recommended that Program status be documented on a weekly basis. Key elements of the templates should include:
- Status working period (from date, to date)
- Progress against the Program Master Plan
- Planned Progress for the following period
- Key issues and concerns
- Copy of Program Issues Log with action updates

For larger Program efforts it is not unusual to have detailed sets of status reporting that roll up into a master status report.

First Meeting Items to Plan For, Continued

Program Risk Mitigation Strategy

This document should list all known Program Risks and associated mitigation actions to counter them. Key elements of the Strategy should include:
- Risk Title
- Risk Severity (High, Medium, Low)
- Risk Owner
- Risk Description
- Risk Impact if not addressed
- Risk Mitigation Action

Program Meeting Calendar

A calendar should be developed that identifies all known Program meetings. This should be kept up to date at all times. It is suggested that responsibility be assigned to a team member to do this.

The calendar will be a critical communication item for Program teams. It is important that each Program team member not only view the items that concern them individually, but that they also see who is meeting with who and for what purpose.

Types of calendar entries might include:
- Status Meetings
- Working Sessions
- Training Sessions
- Road Show Presentations
- Any meeting that a team member wishes to hold with someone

Work Product Delivery Map

This document should list every known Work Product to be produced by the Program and link them to planned delivery dates and owners. Key elements of this might include:
- Work Product Name
- Owning Team Group (i.e. Incident Management Team)
- Owning Contact Name
- Final Approver Contact Name
- Status (Not Started, In Progress, Completed, Late, etc.)
- Work Product Description
- Draft Due Date
- Final Due Date

First Meeting Items to Plan For, Continued

Program Terminology Guide

This document lists common Program terms and definitions. (i.e. what is meant by the word "process"). A separate section should specify acronym definitions (i.e. CMDB = Configuration management Database).

Program Working Standards

This document outlines general terms, conditions and responsibilities for how Program team members will work within the overall Program. Items for this might include:
- When status reports are due
- Who produces status reports/information
- Use of the Program Calendar
- Who/where the definitive source for Program messages is/comes from
- How Key Program messages and work products will be communicated
- How teams will meet/communicate given geographic differences
- Meeting scheduling procedure
- Who is responsible for key pieces of the overall Program
- Where to go for Program questions, issues and concerns
- Program Governance roles and responsibilities
- Use of Program document repository
- Program security procedures to access Program documentation
- Program distribution lists and use of E-Mail
- Program deliverables review procedure
- Key tools needed by Program participants (i.e. Word, Excel, etc.)

First Meeting Items to Plan For, Continued

Stakeholder Initiatives Inventory

This document lists outside initiatives to the Program that are planned or taking place that may be impacted, or have impact on, the overall Program. An example of this might be a Change Management process that is being developed by another organization.

It is important to make sure that all of these initiatives are identified along with a strategy for how to engage with them. The engagement approach might include options such as actively working with the outside initiative, making a contact part of the Stakeholder Team or simply working only on a need-to-know basis.

Key elements of the inventory should include:
- Initiative Name
- Initiative Sponsoring Business Unit
- Initiative Key Contact
- Initiative General Description (Key objectives, scope, target dates, etc.)
- Engagement Approach (Ignore, Make Part Of Team, Put On Advisor Team, Attend some/all meetings, etc.)

Stakeholder Map

This document lists all Program Stakeholders along with their commitment levels, influence in the organization, and key concerns, wants and needs. Key elements of this might include:
- Stakeholder Name
- Organization Title
- Department/Location
- Level of Influence (Major, Minor, etc.)
- Needs (What's in it for them?)
- Concerns/Issues
- Program Opinion (Champion, Follower, Resister, Neutral, etc.)
- Level of Commitment (i.e. 2 hours per week, full time, etc.)

First Meeting Items to Plan For, Continued

Program Baseline Metrics	This document lists each Program success metric and its baseline. This will be used to measure and communicate Program success over time. Therefore, additional columns should be added to show metric values at different time periods or stages of the Program effort. It is okay to have some baseline metrics marked as TBD (To Be Determined). It is still a mark of progress to show TBD turning into real values over time as the Program proceeds.
Program Document Repository	A repository will need to be established to hold all Program working documents. This ideally should be centralized. It should be recognized as the authoritative source for all Program deliverables and documentation. Procedures will need to be developed for accessing the repository as well as for updating it. These will become part of the Program Working Standards. The repository itself should have separation between documents that are work-in-progress, posted for review and marked as final and approved. The repository should be designed with a schema that makes it easy for Program team members to find things. Security aspects of the repository should also be considered. It may be desired that not all items should be seen by all (such as the Stakeholder Map). There may be special needs to allow non-local team members to access the repository.
Security Clearances	Security procedures to get to Program documents, repository, e-mail and calendars should be established and documented. These should be included with the Program Working Standards.

First Meeting Items to Plan For, Continued

Email Distribution Lists

E-Mail distribution lists should be established for the Program along with procedures, roles and responsibilities for maintaining them. Examples of the kinds of lists to develop might include:
- Everyone
- Core Team
- Steering Group
- Core/Extended/Advisor Teams
- Process Owners
- Process Owners and Stakeholders
- Any other groupings as necessary

Kickoff Meeting Presentation

A presentation should be developed to conduct a Program Kickoff Meeting. The very first meeting should be done with at least all the Process Owners. It is not unusual to have multiple kickoff meetings over time if some processes join the Program at later times. Key elements to include in the presentation might be:
- Program goals/approach/overview (steal from prior presentations)
- Participants Concerns and Issues
- Program Working Standards
- Planned Meetings and Next Steps

Deliverables Review Procedure

A procedure should be documented that describes how Program deliverables will be reviewed, approved and signed off on. This should also include the names of any key reviewers and approvers that will be involved with these tasks during the program effort.

Deliverables Templates

To create a common look and feel for all Program deliverables and presentations, templates may be devised. Examples of these might include:
- Presentation templates with logos and formats
- Templates of key deliverables such as a Process Guide

First Meeting Items to Plan For, Continued

Program Governance Process

This process and associated procedures should be documented ahead of time. It describes how Program scope will be controlled and managed. It identifies how changes to the Program will be handled and escalated for decisions. It should also identify key responsibilities, roles and names of personnel who will be involved with Program Governance activities.

Process Modeling and Documentation Standard

A format and tool standard should eb developed for how processes are to be documented. Examples of these might include a choice of:
- IDEF0
- LoveM Diagrams
- Flowcharts
- Swim Lanes
- Other standards that an organization may wish to use