

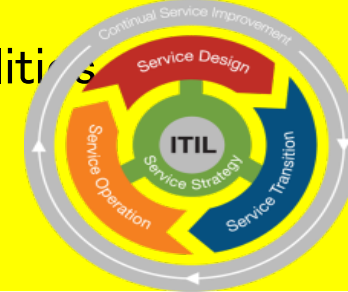
Service Management Training Material

Service Management Guidelines

Global IS Shared Services

Service Management is defined as a set of specialized organizational capabilities for providing value to customers in the form of services.

Source: Foundation of IT Service Management (Orand/Villareal)

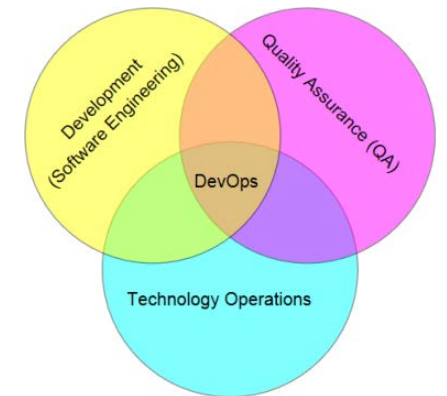


Agile Development is a software development method that enable quick implementation and release of small increments of working software for customers who have urgent requirements to meet changing needs of market and end users.



DevOps (Abbreviation of “Development and Operations”) is an approach to provide software continuously under the collaboration between business owners and development, operation and QA teams based on the principle of “Lean” and “Agile”. With this approach, an enterprise will be able to capture market opportunities faster and receive customer feedback in shorter time.

Source: DevOps for DUMMIES (Compliments of IBM)



Source :wikipedia

Service Management Framework

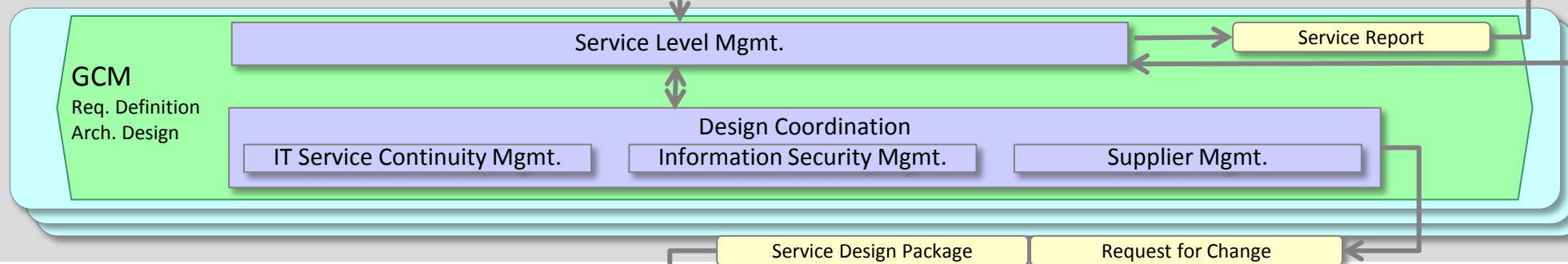
Recap

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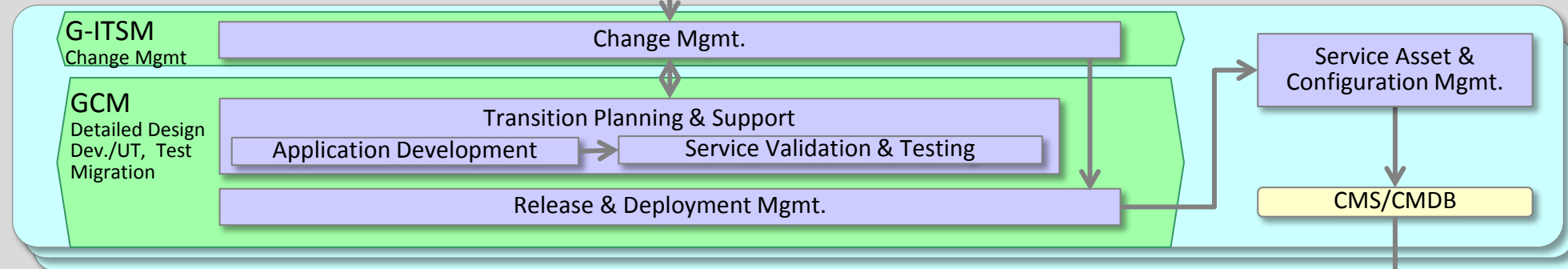
Service Strategy



Service Design



Service Transition



Service Operation



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Service Management Guidelines

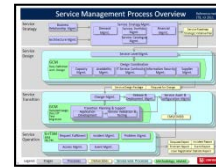
The Service Management Taskforce has prepared guideline documents that will be helpful in implementing Service Management to projects.

Global Service Management Process

Process Guideline

Map View

High-level, Stage-wise



- Process Scope of each Stage
- Relation b/w each Process
- Interface Deliverables b/w each Stage

Definition

Process, Deliverable



- Definition of each Process
 - Input/Process/Output
- Definition of each Deliverable

Process Operation Guideline



- Item(s) to be followed (e.g. Process integration policy and criteria) in case of applying Global Service Management Process

Process Integration Guideline



- Living instance of (GCM,G-ITSM, SOMC) Process integration in GIS

Guidelines' Objectives

Service Management Process Guideline

- To provide the overall and detailed map views of Service Management's stages, processes and process definition including their input, process, output and deliverables.

Service Management Operational Guideline

- To describe way and rule to apply Service Management Process.

Service Management Integration Guideline

- To support the organization to refine its process by preparing the Operational Process Description based on the standard process provided by Global Strategy by applying the Customization Policy.

Global Service Management Process Operation Guideline

Global Strategy
IS Process Management

Actions required for applying Service Management Process

Following two actions are required in order to apply Service Management Process into each specific service:

1. 'Customizing' Standard Process into specific process

Service management process is standard one. Therefore some kind of 'Customization' will be required as follows in order to apply this standard process.

Definition of 'Customization' in this document:

- To select standard processes which are needed in specific service
- To consolidate/split standard processes in order to fit it with operational characteristics in specific service (e.g. Service Validation & Testing is consolidated to Application Development since we currently call development activities as one unified process.
- To rename as needed standard process with familiar name for PICs of specific service in order to establish well understanding the process

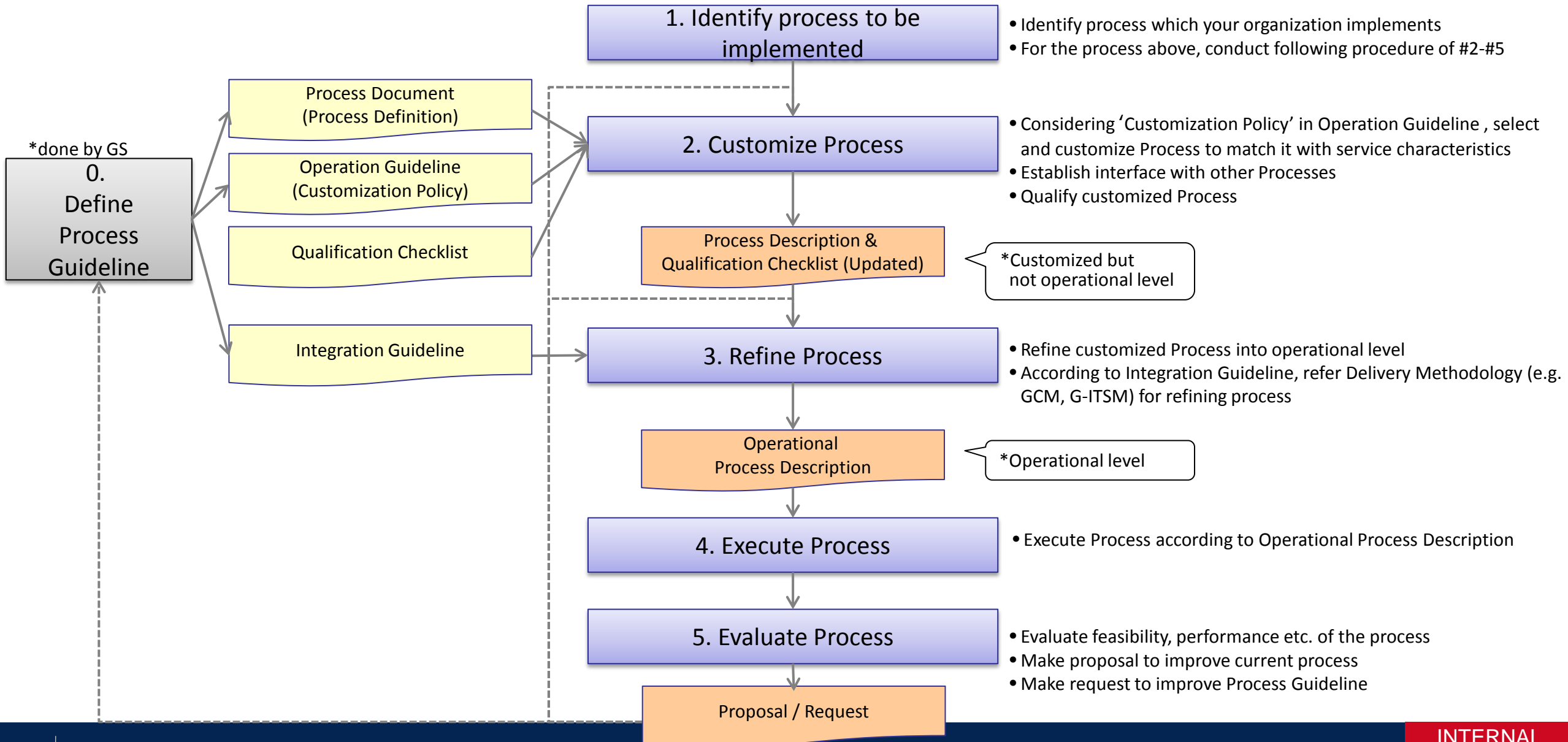
Actions required for applying Service Management Process

2. Refining outline-level description into operational-level

- Service Management Process definition provides outline of each standard process.

Therefore those who apply this service management process into their own specific service need to consider detail process in order to make operational process feasible.

Process Implementation Procedure



Customization Policy

When customizing Service Management Process, it is necessary to apply the following customization policies.

Item	Customization constraints	Available customization
Stage	<ol style="list-style-type: none">1. Keep four-stage structure2. Keep Stage name (Service Strategy, Service Design, Service Transition, Service Operation)	none
Process	<ol style="list-style-type: none">1. Keep Stage location of each Process2. Clarify relationship between Standard Process and each customized process	<ol style="list-style-type: none">1. Omit unnecessary Process2. Change Process name3. Select necessary Primary Activities of each Process
Deliverable	<ol style="list-style-type: none">1. Clarify relationship between following ten Standard Deliverables and each customized deliverable<ol style="list-style-type: none">1. Service Roadmap2. Strategic Initiative Plan3. Service Report4. Service Design Package5. Request for Change6. CMS/CMDB7. Request Report8. Incident Report9. Problem Report10. User Registration Statistic Report2. Clarify owner of above ten Deliverables	<ol style="list-style-type: none">1. Change Deliverable name2. Select necessary Composing elements of each Deliverable

Qualification Process

The following qualification process is required when finalizing process customization in order to secure that customized process is aligned to 'Customization Policy'

1. Self-check by 'Qualification Checklist'

- Items on this checklist are derived from 'Customization Policy'
- Checklist includes two sheets:
 - ✓ Customization checklist
 - ✓ Traceability worksheet

2. Review and approval by Service owner*

- Ask service owner to review customized process
- Get an evidence of process approval by service owner

(*) Tower Head or Tower Lead of GSMC takes role of Service owner

Customization Checklist Template

Service management Process Customization Checklist			
Category	#	Checklist Item	Check
Stage	1	Keep four-stage structure	-
	2	Keep Stage name (Service Strategy, Service Design, Service Transition, Service Operation)	-
Process	3	Keep Stage location of each Process	-
	4	Clarify relationship between Standard Process and each customized process	-
Deliverable	5	Clarify relationship between following ten Standard Deliverables and each customized deliverable 1.Service Roadmap 2.Strategic Initiative Plan 3.Service Report 4.Service Design Package 5.Request for Change 6.CMS/CMDB 7.Request Report 8.Incident Report 9.Problem Report 10.User Registration Statistic Report	-
	6	Clarify owner of above ten Deliverables	-
Date			
Service/ Organization			
Name			

Process Traceability Worksheet Template

Process Traceability Worksheet					
No.	Original Process Name	Stage	Customized Process Name	Omit Process	Note * Please input the reason when you chose "Yes" at column E.
1	Business Relationship Management	Service Strategy			
2	Architecture Management	Service Strategy			
3	Service Strategy Management	Service Strategy			
4	Demand Management	Service Strategy			
5	Service Portfolio Management	Service Strategy			
6	Service Catalogue Management	Service Strategy			
7	Financial Management	Service Strategy			
8	Service Level Management	Service Design			
9	Design Coordination	Service Design			
10	IT Service Continuity Management	Service Design			
11	Information Security Management	Service Design			

No.	Original Process Name	Stage	Customized Process Name	Omit Process	Note * Please input the reason when you chose "Yes" at column E.
12	Supplier Management	Service Design			
13	Change Management	Service Transition			
14	Release and Deployment Management	Service Transition			
15	Service Asset and Configuration Management	Service Transition			
16	Transition Planning and Support	Service Transition			
17	Application Development	Service Transition			
18	Service Validation and Testing	Service Transition			
19	IT Operation Control	Service Operation			
20	Request Fulfilment	Service Operation			
21	Incident Management	Service Operation			
22	Problem Management	Service Operation			
23	Access Management	Service Operation			

Process Traceability Worksheet (SFDC EU Example) **SONY**

Process Traceability Worksheet						
No.	Process Name	Stage	Process Name in SFDC	Applying Status	Further Question (This column will be shown automatically according to column E)	Answer to Further Question
1	Business Relationship Management	Service Strategy	Business Partner role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	Sony Business Partners meet on weekly basis with the business representatives. They discuss current deliverables and future initiatives. The meeting minutes are attached.
2	Architecture Management	Service Strategy	Solutioning and Scoping	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	Every initiative is designed and scoped. At design phase, the Solution Architecture team is doing platform selection. They check in which area this function is best executed. Generally the guideline is the "4 Org Slide" on the ppt present in the Architecture Mgmt folder of the zip file attached Technically, every development is designed to fit the existing structure in the box selected. An example of such a document you can also find in above folder: ADR15201 BRD.... document
3	Service Strategy Management	Service Strategy	N/A	Unnecessary process	Why do you think this process is not necessary?	Umbrella process name for smaller items, so not applicable in this context.
4	Demand Management	Service Strategy	Business Partner role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	Sony Business Partners meet on weekly basis with the business representatives. They discuss current deliverables and future initiatives. The meeting minutes are attached.
5	Service Portfolio Management	Service Strategy	Remedy/ROD	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	We are following standard Remedy Application Management module and Remedy On Demand process. This is used for Development request and issue follow up. Information and process requirements + SLAs are
6	Service Catalogue Management	Service Strategy	Remedy/ROD	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	We are following standard Remedy Application Management module and Remedy On Demand process. This is used for Development request and issue follow up. Information and process requirements + SLAs are
7	Financial Management	Service Strategy	Remedy/ROD + Business Partner role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	The Business Partners know the yearly budget per customer and can check with them the scoping result giving an estimate vs budget provided and consumed.
8	Service Level Management	Service Design	Remedy/ROD	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	We are following standard Remedy Application Management module and Remedy On Demand process. This is used for Development request and issue follow up. Information and process requirements + SLAs are implemented there

Process Traceability Worksheet (SFDC EU Example) **SONY**

Process Traceability Worksheet						
No.	Process Name	Stage	Process Name in SFDC	Applying Status	Further Question (This column will be shown automatically according to column E)	Answer to Further Question
9	Design Coordination	Service Design	Technical Architect + Application Delivery manager role	Unnecessary process	Why do you think this process is not necessary?	Part of SAAS platform, a lot of elements are "platform" topics. Coordination is done by having the different roles talking to each other. On SFDC side this is easy as Sol Architect is line Mgr of Tech Architect
10	IT Service Continuity Management	Service Design	Application Delivery manager role	Unnecessary process	Why do you think this process is not necessary?	Part of SAAS platform, a lot of elements are "platform" topics.
11	Information Security Management	Service Design	Application Delivery manager role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	A platform assessment has been done when selecting SFDC as potential platform. When structural changes are done, the Security Department is informed and they decide whether a new PenTest is required.
12	Supplier Management	Service Design	Solution Architect role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	This is an unofficial role that is picked up by the solution architect as he selected the platform and partners. Legal documents are signed with those partners. These are followed up by legal department.
13	Change Management	Service Transition	Application Delivery manager role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	We have unofficial meetings when a specific deliverable is ready. Business is having people being "way of working lead" that are the interface with IS. They organise a kick off meeting and internally arrange with their colleagues the implementation of the new process.
14	Release and Deployment Management	Service Transition	Application Delivery manager role	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	Many different developments are ongoing at the same time having a different go live schedule. At the UAT approval (any time), an ad-hoc setup is created to bring the deliverable to production. <u>No specific document or process is handled</u>
15	Service Asset and Configuration Management	Service Transition	Technical Architect	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	A excel file is maintained with all the configuration changes that are applied for a specific requirement. This sheet is used just before UAT to create a requirement change set that can be used to bring the developments to UAT and later on to Production.
16	Transition Planning and Support	Service Transition	Technical Architect	Unnecessary process	Why do you think this process is not necessary?	This can be done by the Technical Architect and does not need to have a separate process or name
17	Application Development	Service Transition	Development	Already applied	Please share output of this process with GS (File, Photo, Sample, etc.)	A excel file is maintained with all the configuration changes that are applied for a specific requirement. This sheet is used just before UAT to create a requirement change set that can be used to bring the developments to UAT and later on to Production.

Global Service Management Process Integration Guideline

Global Strategy
IS Process Management

Integration Guideline

Instruction for the Integration Guideline

- The purpose of this document is aiming to support the organization to refine its process by preparing the Operational Process Description based on the standard process provided by Global Strategy by applying the Customization Policy.
 - Each organization may refer to its own existing processes when applying the Customization Policy. To customize and refine Service Management Process to match it with each organization's service characteristics, Methodology Mapping Reference (next sheet) will help to define the processes as existing processes or methodology (e.g. GCM, G-ITSM).
1. For organizations referring to SOMC CIT process:
 - > Please refer to column "SOMC-CIT".
 2. For organizations referring to ITSM process:
 - > Please refer to column "SOMC-ITSM" (for SOMC organizations) or "GIS-ITSM" (for GIS organizations).
 3. For organizations running system development projects:
 - > Please refer to column "SOMC-Agile" or "GIS-Agile" for projects applying Agile.
 - > Please refer to column "GIS-WF" for projects applying Waterfall.

Integration Guideline

Definition of Terms:

- No support by above methodology
The process is not covered by the existing processes/methodology so the organization needs to refer and apply
- Service Management Process if it is necessary to apply the process.
- Refer to 'xxxxxx' process
There are similar processes in the existing processes. In this case, the organization will refer to the process written in the cell.

Integration Guideline

[illegible]

Integration Guideline

No.	Service Management Process Name	Methodologies which can be referred for refining each Service Management Process					
		SOMC-CIT	SOMC- Agile	SOMC- ITSM	GIS-WF	GIS-Aglie	GIS-ITSM
11	Availability Management	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology
12	IT Service Continuity Management	No support by above methodology	No support by above methodology	No support by above methodology	Refer to the following processes: - GP13 System Requirement Definition - GP15 Infrastructure Requirement Definition - GP19 System Function Design - GP22 Infrastructure Architectural Design	Refer to the following process: - AP12 Solution Design and substantiate with more details	No support by above methodology
13	Information Security Management	No support by above methodology	No support by above methodology	No support by above methodology	Refer to the following processes: - GP13 System Requirement Definition - GP15 Infrastructure Requirement Definition - GP19 System Function Design - GP22 Infrastructure Architectural Design	No support by above methodology	No support by above methodology
14	Supplier Management	Refer to the following process: - Supplier Management	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology
15	Change Management	Refer to the following processes: - Demand Approval (2nd part) - Change Mgmt (SOMC Definition)	No support by above methodology	Refer to the following processes: - Demand Approval (2nd part) - Change Mgmt (SOMC Definition)	No support by above methodology	Refer to the following process: - AP22 Release Planning	Refer to the following process: - Change management (Change evaluation included in CAB function)
16	Release and Deployment Management	Refer to the following process: - Release and Deployment Management (partially)	No support by above methodology	No support by above methodology	No support by above methodology	Refer to the following process: - AP30 Delivery	No support by above methodology
17	Service Asset and Configuration Management	No support by above methodology	No support by above methodology	Refer to the following process: - IT Service Asset and Configuration Management (except for source code mgmt)	No support by above methodology	Refer to the following process: - AP30 Delivery	Refer to the following process: -Service Asset and Configuration Management

Integration Guideline

No.	Service Management Process Name	Methodologies which can be referred for refining each Service Management Process					
		SOMC-CIT	SOMC- Agile	SOMC- ITSM	GIS-WF	GIS-Aglie	GIS-ITSM
18	Transition Planning and Support	Refer to specific delivery/project model of SOMC	No support by above methodology	No support by above methodology	Refer to the following processes: - GP16 Business Migration Planning - GP31 Business Migration Preparation - GP46 Business Migration - GP20 System Migration Planning - GP34 System Migration Preparation - GP47 System Migration	Refer to the following process: - AP25 Iteration Planning	No support by above methodology
19	Application Development	Refer to specific delivery model of SOMC	Refer to process defined by GADC-DL Agile taskforce and also refer SOMC specific delivery model	No support by above methodology	Refer to the following processes: - GP33 Detailed Design - GP37 Coding and Unit Test	Refer to the following processes: - AP23 Infrastructure Installation - AP24 Development Environment Preparation - AP26 Development - AP27 Daily Stand-up Meeting - AP29 Delivery Preparation - AP31 Iteration Retrospective - AP39 System Mgmt Preparation - AP40 System Mgmt Handover	No support by above methodology
20	Service Validation and Testing	Refer to the following process: - Test Management	Refer to the following process: - Test Management	No support by above methodology	Refer to the following processes: - GP39 Integration Test - GP41 System Test - GP43 Production Environment Test - GP45 User Acceptance Test	Refer to the following processes: - AP26 Development - AP27 Daily Stand-up Meeting - AP28 Completion Judgment - AP29 Delivery Preparation - AP31 Iteration Retrospective - AP39 System Mgmt Preparation - AP40 System Mgmt Handover	No support by above methodology

Integration Guideline

No.	Service Management Process Name	Methodologies which can be referred for refining each Service Management Process					
		SOMC-CIT	SOMC- Agile	SOMC- ITSM	GIS-WF	GIS-Aglie	GIS-ITSM
21	IT Operation Control	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology
22	Request Fulfilment	No support by above methodology	No support by above methodology	Refer to the following process: - Request Fulfilment	No support by above methodology	No support by above methodology	Refer to the following process: - Request Fulfilment
23	Incident Management	No support by above methodology	No support by above methodology	Refer to the following process: - Incident Management	No support by above methodology	No support by above methodology	Refer to the following process: - Incident Management
24	Problem Management	No support by above methodology	No support by above methodology	Refer to the following process: - Problem Management	No support by above methodology	No support by above methodology	Refer to the following process: - Problem Management
25	Access Management	No support by above methodology	No support by above methodology	Refer to the following process: - Access Management (except for role management)	No support by above methodology	No support by above methodology	No support by above methodology
26	Event Management	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology	No support by above methodology

Service Management eQuiz

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