Day 1: August 15

Module 1 - Intro

* Structure of Guide
  + Service Management as a practice
    - IT now considered a service based industry - helps business achieve outcomes
    - Very important ITIL concept - understand what service means
  + 5 phases of the life cycle
    - **Continual service improvement**
    - **Service strategy**
    - **Service design**
    - **Service transition**
    - **Service operation**
  + 4 total sample exams inside guide
    - Will have time for 1 practice exam on last day, so don’t look at them all
* Exam format
  + 60 minute duration, 40 multiple choice questions, closed book
  + Pass score 65%
    - 26/40
  + Don’t try to memorize everything, understand it
* ITIL Qualification scheme
  + ITIL Foundation -> ITIL Practitioner -> Lifecycle modules/Capability modules
* ITIL History
  + Concept emerged in ‘80s from British government
  + In ‘90s adopted by major companies
  + Now managed by AXELOS
* Sources of Best Practice
  + Sources (Generate)
    - Standards
      * ITIL is not a standard
    - Industry Practices, academic research, training, internal experience
  + Enablers (Aggregate)
    - Employees, Customers, Suppliers, Advisors, Technologies
  + Drivers
    - Substitutes - Competition
    - Regulators - Compliance
    - Customers - Commitments
* Best Practices in the Public Domain
  + ITIL, ISO/IEC 20000, Cobit, TOGAF, PMBOK
* ITIL Propaganda
  + Vendor neutral
  + Non-prescriptive
  + Best practice
* ABC
  + Worst practices
    - Everything has highest priority
      * Solve by creating expectations for users
      * Part of service design
    - Not my responsibility
      * Can be a result of chaotic environments without processes
    - Throwing solutions over the wall
      * Creating technical solutions without user buy-in
    - Plan, do, stop
      * Should be plan, do, check, act

Module 2 - Service Management as a Practice

* Service Management as a Practice
  + Value creation
    - Should be treated as a business
    - Must know what value is to create is for business
  + Service assets
    - What skills people have, infrastructure in place
  + Processes and functions
    - In place to help create value
* Service definition
  + Service is a means of delivering **value** to customers by facilitating **outcomes** customers want to achieve, without the ownership of specific **costs** and risks
  + Service mindset instead of project mindset - even if a project is on budget + on time, if it’s not adding value to the business it’s a failure
  + Important to work with customers to ensure that value is being added
  + Service requires a relationship between IT + business
* ITSM
  + ITIL is about IT Service management
    - Implementation and management of quality IT Services that meet business needs
    - Not about technology
* Value
  + The level to which a service meets a customer’s expectations
  + Customer’s perception can change value
    - Communication (knowing the customer’s desired outcomes) and managing expectations are important
* Value creation
  + Utility - fit for purpose
    - Normally tied to applications - front end, understood by customers
  + Warranty - fit for use
    - **Availability, capacity, security, + continuity**
    - More connected with back-end infrastructure, part of SLA
* Business value
  + IT develops a utility to meet business requirements
  + IT then determines which resources + capabilities (service assets) are needed
  + The value is the ability to meet business needs
  + IT is being thought of less as a cost center, and more as adding value
* Components of value
  + Perceptions, preferences, business outcomes
* How customers perceive value
  + Customers may have a different reference value which IT is not aware of
  + If the gap in expected service and perceived service is not managed, the project will not be successful
* Managing expectations
  + If you’re only meeting expected value, you must have a low price
* Types of services
  + Internal + External services
  + Core
    - Example: student registration system
    - Things that customers access directly
  + Enabling
    - Example: network
    - Enable core services
  + Enhancing
    - Example: extra storage, faster speed (typically optional)
* Key stakeholders
  + Internal: ex. Faculty
  + External: ex. Students
    - Both are users
      * Users are people who consume services
      * Customers make financial decisions based on services
  + Suppliers: ex contractor
    - Should report to service provider (IT)
      * If not reporting to IT, called Shadow IT
* Service assets
  + Assets are composed of **resources** and **capabilities**
    - Resources include: capital, infrastructure, people (body count)
    - Capabilities include: management, processes, people (skills)
  + Resources are exploited by capabilities
* Design constraints for a service
  + Services must be bound by **utility** and **warranty**
* Processes and functions
  + Process: structured set of activities designed to accomplish a specific objective
    - Takes 1+ inputs and turns them into outputs
* Process model
  + Process control
    - Includes process objectives
    - Manager must enforce process policy
  + Process
    - What transforms inputs into outputs
  + Process enablers
    - Service assets
* Process characteristics
  + **Measurability, Specific results, customers, responsiveness to specific triggers**
* Role
  + Set of responsibilities, activities, and authorities granted to a person or team
  + Each person will have many roles
* RACI matrix
  + Must be one and only one person accountable for every activity
    - Can have multiple people responsible for an activity
  + 2 things can go wrong - people didn’t follow the process, or the process didn’t produce the correct outcome
* Process owner - ultimately accountable for ensuring that a process is fit for purpose
  + Should continually improve the process
* Process manager - accountable for operational management of process
  + Drives policy in the organization, ensures process is followed
* Process practitioner - carries out the process
* Service owner - accountable for a specific service regardless of process or technology
* Competence and training
  + Skills matrix can ensure everyone is at the same level
* Function - team or group of people and tools they use
  + ITIL defines 4 functional groups: **Service Desk, Technical Management, Application Management, Operation Management** (composed of **Operations Control** and **Facilities**)
* Service Strategy
  + Continual Service Improvement should devise an ongoing improvement roadmap
  + Strategy is the phase of designing, developing, and implementing Service Management as a strategic asset
  + The goal is to design strategy so well that it becomes a central part of the business
* Service Design
  + The phase that turns a service strategy into a plan for delivering the business outcomes
* Service Transition
  + Phase of developing + improving capabilities for introducing new + changed services
* Service Operation
  + Phase of achieving effectiveness and efficiency in providing and supporting services in order to ensure value for the customer, users, and service provider
    - Only phase where customers see value
* Continual service improvement
  + Phase of creating + maintaining value for the customer through improvements
  + Without continuous improvements, service will degrade
  + Every service should have a CSI plan

Module 3 - Continual Service Improvement

* CSI
  + Purpose is to align IT Services with changing business needs by identifying + implementing improvements to IT services that support business processes
* Objectives
  + Improvements to entire lifecycle
  + Focus on effectiveness and efficiency
    - Effectiveness: doing the right thing
    - Efficiency: doing the thing right
  + Using proven quality management methods
  + Ensuring appropriate measurements
    - Technical, process, + service
* Scope
  + Continual alignment of service portfolio with current + future business needs
  + Maturity and capability of the organization, management, processes + people utilized by the services
* Governance
  + Ensures that policies + strategy are implemented, and processes are followed correctly
  + Can be organically shaped by managerial action
  + Most orgs govern too restrictively
* Culture
  + Collection of group behaviour
  + Purpose of governance is to adjust culture
* Deming cycle
  + Plan, do, check, act
  + Improving every day instead of waiting for problems to emerge
* CSI Approach
  + Continuous cycle for Improvement in 6 steps
    - What is the **vision**
      * Vision should never be achieved
    - Where are we now (**baseline**)
    - **Where do we want to be**
    - **How do we get there**
    - **Did we get there**
    - How do we keep the momentum going
* Seven-step improvement process
  + Identify, define, gather, process, analyze, present, implement
* Baseline - can be used as a starting point to measure the effect of a service improvement plan
* Types of metrics
  + **Technology** ex. uptime
  + **Process** ex. Incidents re-opened
  + **Service** ex. Number of students registered
    - Usually calculated from technology + process
* **CSF - critical success factor**
  + **Something that must happen for a process/project/plan/IT Service to succeed**
* **KPI - key performance indicator**
  + **Metric that measures the achievement of a CSF and helps manage a process, IT service, or activity**
* CSF + KPI considerations
  + No more than 2 - 5 KPIs per CSF, no more than 2 - 5 CSFs per service/process
* CSI across the lifecycle

Module 4 - Service Strategy

* Service strategy purpose
  + Define the perspective, position, plan, + pattern that a service provider needs to be able to execute to meet an organization’s business outcomes
* Objectives
  + Define customers, services, how value is created, how assets underpin value
  + Provide a clear delivery + funding model
* Service Strategy processes
  + **Service portfolio management**
  + **Financial management for IT services**
  + **Business relationship management**
  + Demand management
  + Strategy management for IT services
* Service portfolio management
  + Purpose: to ensure that the service provider has the right mix of services to balance the investment in IT with ability to meet business outcomes
* Service portfolio
  + Contains **service pipeline, service catalogue, retired services**
    - Customer should only see service catalogue
* Business case
  + Decision support + planning tool that projects the likely consequences of a business action
* Financial management
  + Purpose: to secure the appropriate level of funding to design, develop, + deliver services the meet the organization’s strategy
  + Sub-processes:
    - **Accounting**
    - **Budgeting**
    - **Charging**
* Business Relationship Management
  + Purpose: establish + maintain a business relationship between the service provider and the customer based on understanding the customer and its business needs
* PBA - Patterns of Business Activity