Introduction to ITIL® Practitioner

⬤ **Introduction:** Organizations constantly change. To survive, awareness is required before responding to these changes. Organizations that embrace change can be in a strong position to achieve their strategic goals. By accepting the fact that every change can be an improvement, many organizations promote analysis of their processes, services, products and ways of working.

The ITIL Practitioner book, course and qualification has been developed for IT Service Management people who already have an understanding of the ITIL framework but would like more knowledge, tips and guidance on how to adopt and adapt ITIL within organizations.

Included areas:

⬤ 9 Guiding principles

⬤ CSI Approach

⬤ Metrics and measurements

⬤ Communication

⬤ Organizational Change Management (people change)

"Quality isn't job One.
　　Being totally fucking amazing is job One" : Gapingvoid.com

Definitions:

- **Outputs:** Products handed over to customers.

- **Outcomes:** Result of activities using outputs, both intended and actual.

- **Service:** Facilitate outcomes customers want to achieve.

- **Adopt ITIL:** Commit to a service-oriented, customer-outcome focused culture.

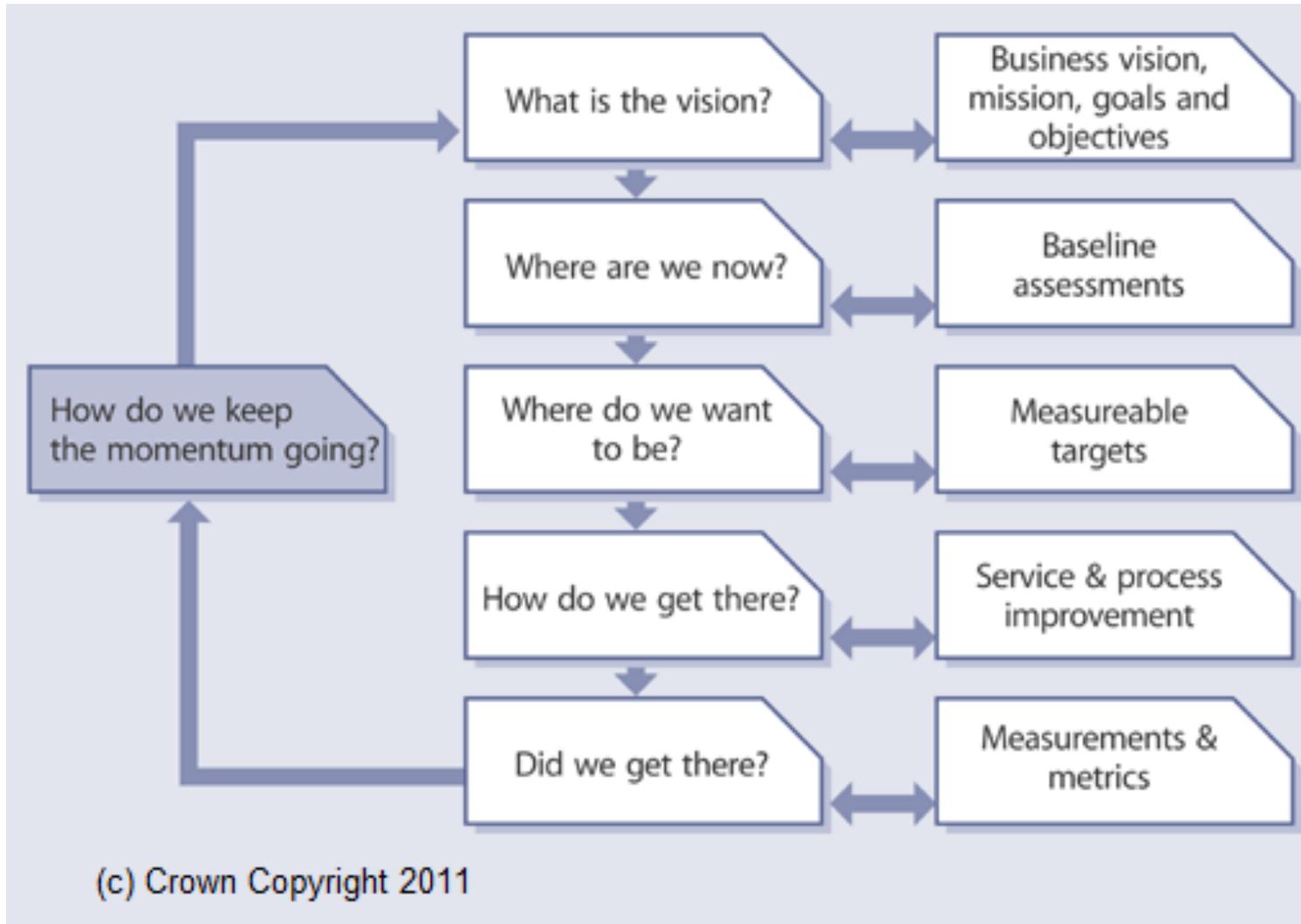- **Adapt ITIL:** Apply critical thinking to ITIL best practices.

Clearly identify your customer. Then consider these 4 areas:

- **Value:** How will our services deliver value to this customer?

- **Outcomes:** What are the specific outcomes the customer wants to achieve?

- **Costs:** What are the complete costs for the customer for achieving these outcomes?

- **Risks:** What may happen that could threaten these customer outcomes?

9 Principles: Keys to success

Focus on value: Customers determine what is of value for them. Every activity should be mapped directly or indirectly to achieving this value for customers or the service provider organization.

Design for experience: Keep in mind the experience the customers and users have when interacting with the service and service provider.

Start where you are: Resist temptation to always start from scratch. The current situation, services and products may be used to create the desired future.

Work holistically: No service or component stands alone. Hardware, Infrastructure, software, metrics, tools, people, processes and partners all coordinate to provide customer value.

Progress iteratively: Resist the temptation to do everything at once. Break large improvement projects down into easier to manage sizes.

Observe directly: To really know what is going on, measure and observe directly. Be aware of optimism bias and assumptions.

Be transparent: Let people know what is happening and be sure to communicate the "why" as clearly as possible. This should result in less resistance.

Collaborate: Involve the right people in the right work, making the right decisions at the right time. This should result in better long-term success.

Keep it simple: If a process, procedure, action, metric or measurement provides no useful outcome, eliminate it. This principle is quite obvious yet often forgotten.

CSI Approach - Steps to improvement

What is the vision? ↔ Business vision, mission, goals and objectives

Where are we now? ↔ Baseline assessments

Where do we want to be? ↔ Measureable targets

How do we get there? ↔ Service & process improvement

Did we get there? ↔ Measurements & metrics

How do we keep the momentum going?

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CSI Approach - Outputs for steps 1-3

- **What is the vision?**

  - Information from an **orientation worksheet** including overall organizational vision, an understanding for your team and an understanding for you on how to contribute.

  - Agreed focus areas for potential improvement.

  - Understanding of stakeholders by completing **stakeholder worksheet** and **stakeholder map.**

- **Where are we now?**

  - Understanding of the current state of the improvement area of focus.

  - Baseline measurements and metrics of the current state to be used to compare later.

- **Where do we want to be?**

  - Description of desired future state.

  - Results of a **GAP** analysis showing current deficiencies.

  - Prioritized list of improvements (**SMART**) and balanced **KPIs**

  - Understanding of constraints which may influence improvements

CSI Approach - Outputs for steps 4-6

How do we get there?

- Approved action plan, aligned with stakeholders requirements for governance

- Understanding and acceptance of efficient methods to reach the expected results

- Completed improvement actions, based on earlier approved plans

Did we get there?

- Completed and verified results

- Completed benefits review document

How do we keep the momentum going?

- Established changes from the executed improvements

- Understanding of support to CSI in the future

Metrics and measurements

⦿ We measure to **Validate**, **Direct**, **Justify** and **Intervene**.

⦿ A **Critical Success Factor (CSF)** is something that must be achieved for success. Some CSFs are difficult to measure. Therefore **Key Performance Indicators (KPI)** must be measurable and linked to CSFs. KPIs should be **SMART** (**Specific**, **Measurable**, **Achievable**, **Relevant**, **Time-bound**).

⦿ **Balanced scorecard balances 4 perspectives:**

(Customers, Financial, Learning and Growth, Business processes)

⦿ **Another way to categorize metrics and measurements:**

- Technology, process and service metrics
- Progress, compliance, effectiveness and efficiency
- Leading and Trailing
- Inside-out and outside-in

⦿ **Assessment outputs:**

- GAP analysis (Difference between actual and chosen criteria)
- SWOT analysis (Strengths, Weaknesses, Opportunities and Threats)
- Process metrics (Process metrics in numbers)
- Process maturity (Based on a maturity model to compare)
- Organization maturity (Based on maturity of overall organization)
- Change readiness (Based on ability to move to new ways of working)
- Customer satisfaction (How customers feel)
- SLA achievement (Actual SLA against SLA targets)
- Benchmark comparison (Comparison of organization against other organizations)

Communication

5 principles for good communication:

  - Communication is a 2-way process (sender & receiver)
  - We are communicating all the time (Body language, voice, omission)
  - Timing and frequency matter (Good timing can be vital)
  - There is no single method of communicating that works for everyone (Everyone has preferences)
  - The message is in the medium (Don't send sms if you want to break-up with your partner)

Organizational Change Management

- Organizational Change Management (OCM) focuses on the people side of Change Management.

- For successful OCM:
  - Clear and relevant objectives
  - Strong and committed leadership
  - Willing participants
  - Prepared participants
  - Sustained improvement

- At the bare minimum, each person involved needs to understand the need for the planned change.

- For stakeholders, RACI model can be used to define roles and responsibilities:
  - Responsible: Role that works directly with the task
  - Accountable: Role ultimately answerable for the completion of the activity
  - Consulted: Two-way communication
  - Informed: One-way communication

- John Kotter wrote about 8 steps in the book, Leading Change
  - Create a sense of urgency (Make status quo a dangerous place for people to remain)
  - Stakeholder management (Stakeholder analysis worksheet, Stakeholder map & Stakeholder communication plan)
  - Sponsor management (Authorizing sponsors, Reinforcing sponsors, Target groups)
  - Communication (WIIFM - What's in it for me?)
  - Empowerment (Training needs analysis)
  - Resistance management (Fear of the unknown, make it easier to move forward by involving people)
  - Reinforcement (Institutionalize the changes, rewards and recognitions)

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