ITIL CSI Intermediate

How to pass the exam

CSI Objectives

1. Review, analyse and make recommendations on improvement opportunities in each lifecycle phase: Service Strategy, Service Design, Service Transition and Service Operation.

2. Review and analyse Service Level Achievement results.

3. Identify and implement individual activities to improve IT service quality and improve the efficiency and effectiveness of enabling ITSM processes.

4. Improve cost effectiveness of delivering IT services without sacrificing customer satisfaction.

5. Ensure applicable quality management methods are used to support continual improvement activities.

3 areas CSI needs to address

- The overall health of ITSM as a discipline

- The continual alignment of the portfolio of IT services with the current and future business needs

- The maturity of the enabling IT processes for each service in a continual service lifecycle model.

The deliverables of CSI must be reviewed on an ongoing basis to verify:

- completeness, functionality and feasibility to ensure that they remain relevant and do not become stale and unusable.

CSI Model

- Embrace the vision by understanding the high-level business objectives. The vision should align the business and IT strategies.

- Assess the current situation to obtain an accurate, unbiased snapshot of where the organization is right now. This baseline assessment is an analysis of the current position in terms of the business, organization, people, process and technology.

- Understand and agree on the priorities for improvement based on a deeper development of the principles defined in the vision. The full vision may be years away but this step provides specific goals and a manageable timeframe.

- Detail the CSI plan to achieve higher quality service provision by implementing ITSM processes

- Verify that measurements and metrics are in place to ensure that milestones were achieved, processes compliance is high, and business objectives and priorities were met by the level of service.

- Finally, the process should ensure that the momentum for quality improvement is maintained by assuring that changes become embedded in the organization.

Service GAP Model

- Since CSI involves ongoing change, it is important to develop an effective communication strategy to support CSI activities - ensuring people remain appropriately informed. This communication must include aspects of what the service implications are, what the impact on the personnel is and the approach or process used to reach the objective. In the absence of truth, people will fill in the gap with their own truth.

Common term: Improvements

- Outcomes that when compared to the 'before' state, show a measurable increase in a desirable metric or decrease in an undesirable metric Example: ABC Corp achieved a 15% reduction in failed changes through implementation of a formal Change Management process.

Common term: Benefits

- The gains achieved through realization of improvements, usually but not always expressed in monetary terms.

Common term: ROI

- The difference between the benefit (saving) achieved and the amount expended to achieve that benefit, expressed as a percentage. Logically, one would like to spend a little to save a lot.

Common term: VOI

- The extra value created by establishment of benefits that include non-monetary or long-term outcomes. ROI is a sub-component of VOI.

Ownership

- is fundamental to any improvement strategy.

Utilizing the Service Catalogue as the baseline…

- negotiate Service Level Agreements (SLAs) with the business

To continually monitor and improve the levels of service.

- Create a Service Improvement Plan (SIP)

4 reasons to monitor and measure:

- To validate - monitoring and measuring to validate previous decisions

- To direct - monitoring and measuring to set direction for activities in order to meet set targets. It is the most prevalent reason for monitoring and measuring

- To justify - monitoring and measuring to justify, with factual evidence or proof, that a course of action is required

- To intervene - monitoring and measuring to identify a point of intervention including subsequent changes and corrective actions.

7-Step Improvement Process

1. Define what you should measure

2. Define what you can measure

3. Gathering the data

4. Processing the data

5. Analysing the data

6. Presenting and using the information

7. Implementing corrective action

KPI categories can be classified as the following:

- Compliance - are we doing it?

- Quality - how well are we doing it?

- Performance - how fast or slow are we doing it?

- Value - is what we are doing making a difference

IT operational/technical managers

- These people will be concerned with the tactical and operational metrics which support better planning, coordination and scheduling of resources. The operational managers will be interested in their technology domain measurements such as component availability and performance.

IT Management

- management will be interested in the tactical and strategic results that support the business.

Before starting the design of any report it is also important to know the following:

- Who is the target audience of the report?

- What will the report be used for?

- Who is responsible for creating the report?

- How will the report be created?

- How frequently is the report to be created?

- What information will be produced, shared or exchanged?

Reports can be set up to show the following:

- Results for a service - supporting reports would be the individual measurements on components

- Health of a service management process - this report will have certain process KPI results

- Functional reports - such as telephony reports for theService Desk.

Policies that support CSI activities are often found as a part of SLM, AM and CM. Examples of some of these policies are:

- Monitoring requirements must be defined and implemented

- Data must be gathered and analysed on a consistent basis

- Trend reporting must be provided on a consistent basis

- Service Level Achievement reports must be provided on a consistent basis

- Internal and external service reviews must be completed on a consistent basis (internal is within IT and external is with the business)

- Services must have either clearly defined service levels or service targets that can be used to determine if there are gaps in the services provided

- Service management processes must have critical success factors and key performance indicators to determine if there are gaps between the expected outcome and the real outcome.

Additional CSI polices that an IT organization should implement:

- All improvement initiatives must use the formal Change Management process

- All functional groups within IT have a responsibility for CSI activities. This might be only one person in the group, but the intent here is that CSI is not usually a functional group within an organization but that everyone has a hand in supporting CSI activities

- Roles and responsibilities will be documented, communicated and filled within IT.

On a consistent basis means:

- the activity is not done ad hoc but on scheduled dates such as monthly or quarterly. Most organizations review service achievement and service management process results on a monthly basis.

3 types of metrics that an organization will need to collect to support CSI

- Technology metrics - These metrics are often associated with component and application-based metrics such as performance, availability etc.

- Process metrics - These metrics are captured in the form of CSFs, KPIs and activity metrics for the service management processes. These metrics can help determine the overall health of a process. Four key questions that KPIs can help answer are around quality, performance, value and compliance of following the process. CSI would use these metrics as input in identifying improvement opportunities for each process.

- Service metrics - These metrics are the results of the end-to-end service. Component metrics are used to compute the service metrics.

To consider whether a KPI is fit for use. Key questions are:

- What does the performance indicator really tell us about goal achievement?

- How easy is it to interpret the performance indicator?

- When do we need the information?

- To what extent is the performance indicator stable and accurate?

- How easy is it to change the performance indicator itself?

Tension metrics:The effort from any support team is a balancing act of 3 elements:

- Resources - people and money

- Features - the product or service and its quality

- The schedule.

When to assess

- Plan (project initiation) - Assess the targeted processes at the inception of process introduction to form the basis for a process improvement project. Processes can be of many configurations and design which increases the complexity of assessment data collection.

- Plan (project midstream) - A check during process implementation or improvement activities serves as validation that process project objectives are being met and, most importantly, provide tangible evidence that benefits are being achieved from the investment of time, talent and resources to process initiatives.

- Do/Check (process in place) - Upon the conclusion of a process project, it is important to validate the maturation of process and the process organization through the efforts of the project team. In addition to serving as a decisive conclusion for a project, scheduling periodic reassessments can support overall organizational integration and quality efforts.

What to assess and how(scope)

- Process only - Assessment only of process attributes based on the general principles and guidelines of the process framework which defines the subject process.

- People, process and technology - Extend the process assessment to include assessment of the skills, roles and talents of the managers and practitioners of the process as well as the ability of the process-enabling technology deployed to support the objectives and transaction state of the process.

- Full assessment - Extend the people, process and technology assessment to include an assessment of the culture of acceptance within the organization, the ability of the organization to articulate a process strategy, the definition of a vision for the process environment as an end state, the structure and function of the process organization, the ability of process governance to assure that process objectives and goals are met, the business/IT alignment via a process framework, the effectiveness of process reporting/metrics, and the capability and capacity of decision-making practices to improve processes over time.

Using external resources for assessments

- pro: Objectivity Expert ITIL knowledge Broad exposure to multiple IT organizations Analytical skills Credibility Minimal impact to operations

- con: Cost Risk of acceptance Limited knowledge of existing environments Improper preparation affects effectiveness

Performing self-assessments

- Pro: No expensive consultants Self-assessments available for free Promotes internal cooperation and communication Good place to get started Internal knowledge of environment

- Con: Lack of objectivity (internal agendas) Little acceptance of findings Internal politics Limited knowledge or skills Resource intensive

3 main types of benchmarking costs:

- Visit costs - This includes travel- and accommodation-related expenses for team members who need to travel to the site.

- Time costs - Members of the benchmarking team will be investing time in researching problems, finding exceptional companies to study, visits and implementation. This will take them away from their regular tasks for part of each day so additional staff might be required.

- Benchmarking database costs - Organizations that institutionalize benchmarking into their daily procedures find it is useful to create and maintain a database of best practices and the companies associated with each best practice.

Internal benchmark

- completed internally using resources from within the organization to assess the maturity of the service management processes against a reference framework

External benchmark

- this would be completed by an external third-party company. Most of these have their own proprietary models for the assessment of service management process maturity.

Balanced Scorecard is complementary to ITIL. Some of the links to IT include the following:

- Client perspective - IT as a service provider, primarily documented in Service Level Agreements (SLAs)

- Internal processes - Operational excellence utilizing Incident, Problem, Change, Configuration and Release Management as well as other IT processes; successful delivery of IT projects

- Learning and growth - Business productivity, flexibility of IT, investments in software, professional learning and development

- Financial - Align IT with the business objectives, manage costs, manage risks, deliver value; IT Financial Management is the process used to allocate costs and calculate ROI.

A SWOT analysis is a strategic planning tool used

- to evaluate the strengths, weaknesses, opportunities and threats involved in a project, business venture or in any other situation requiring a decision.

Essentially FTA distinguishes between four events:

- basic events, resulting events, conditional events and trigger events.

Fault Tree Analysis (FTA)

- is a technique that is used to determine the chain of events that cause a disruption of IT services

Availability Management

- To optimize the capability of the IT infrastructure, services and supporting organization to deliver a cost-effective and sustained level of availability enabling the business to meet their objectives. The AM process has both a reactive and proactive nature.

Expanded Incident lifecycle

- A technique to help with the technical analysis of Incidents affecting the availability of components and IT services. The Expanded Incident lifecycle is further made up of two parts: time to restore service (aka downtime) and time between failures (aka uptime). There is a diagnosis part to the Incident lifecycle as well as repair, restoration and recovery of the service.

Demand Management

- is often associated with influencing the end users' behaviour.

Service Manager

- is an important role that manages the development, implementation, evaluation and on-going management of new and existing products and services. Responsibilities include business strategy development, competitive market assessment/benchmarking, financial and internal customer analysis, vendor management, inventory management, internal supplier management, cost management, delivery and full lifecycle management of products and/or services

Service Owner

- is accountable for a specific service within an organization regardless of where the underpinning technology components, processes or professional capabilities reside. Service ownership is as critical to service management as establishing ownership for processes which cross multiple vertical silos or departments.