ITIL in the Workplace

The Practical Application of a Best Practice Framework

Susan Ryan
April 3, 2009
Agenda

- Hello!
- Why IT Service Management?
- ITIL 101
- Maturity Assessment and Roadmaps
- Project Foundation
- Processes Implemented
- Organizational Change Management
- Results/Metrics
- ITIL Resources

Hi, my name is Susan...

- IT industry worker for over 25 years
- ITIL v2 Manager Certified
- itSMF Minnesota Local Interest Group President
- IT Service Manager at Blue Cross Blue Shield of Minnesota
  - Service Desk, Incident Management
  - Change, Configuration, Release Management
  - Request Management
My trusty assistant, Melissa…

- Melissa Howard will be representing the Web cast participants
- Hoping to make this very conversational, so please ask questions as we go along! I’ll let you know if we’re going to hit that topic later or if the answer is bigger than a breadbox and needs to be parked for the end or off line.

Why IT Service Management?

- Value Proposition
  - Strategy
  - Service management practices
  - Continual improvement
- Trusted partnership!
ITIL 101 – Briefly!

- Information Technology Infrastructure Library
  - British Government & IBM Collaboration
- Version 2 – Focus on Process
- Version 3 – Focus on Lifecycle

ITIL Version 2

- Service Support
- Service Delivery
- And more!
ITIL Version 3

- Lifecycle of a Service
  - Strategy
  - Design
  - Transition
  - Operation
  - Continual Improvement

The processes are still there
Each process becomes important at a point in service development
Process Dependencies

ITIL Training and Certification
If you don’t know where you are going, how will you know when you arrive?

- **Maturity Assessment**
  - Series of questions for each process
  - Ordered to allow for assessment of maturity
  - If in doubt, just say no!

- **Roadmap**
  - Process plans on a timeline
  - Dependencies on other processes identified
  - Maturity levels identified

- Assessment shows where work still needs to be done
- Some processes may have dependencies on other processes in order to mature
<table>
<thead>
<tr>
<th>ITIL Service Support Skill Assessment: Change Management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level 1: Pre-requisites</strong></td>
</tr>
<tr>
<td>1. Are sufficient change management processes defined in the organization? Yes</td>
</tr>
<tr>
<td>2. Are change management policies supported by IT policies? Yes</td>
</tr>
<tr>
<td>3. Are there procedures for handling requests for change? Yes</td>
</tr>
<tr>
<td><strong>Level 2: Management Intent</strong></td>
</tr>
<tr>
<td>4. Do the reasons and benefits of change management have been documented within the organization? Yes</td>
</tr>
<tr>
<td>5. Has the scope of change management activity been established within the organization? Yes</td>
</tr>
<tr>
<td>6. Does the organization have standards or other quality criteria for the induction and recognition of changes? Yes</td>
</tr>
</tbody>
</table>

Any "No" answers need to be built into the process roadmap.

Roadmap color-coded by maturity level requirements.
Project Foundation

- Process Strategy/Goals
- Benefits to Business and IT
- Policy
- Governance
- Design Team
- Project Manager
- ITIL Expertise – Internal or External
Strategy/Goals

- Strategic – Roadmap
  - Year 1
  - Year 2
  - Year 3
- Tactical – Current project
  - Short-term
  - Medium-term
  - Long-term

Benefits

- Ensures the process is being designed and developed to create measurable service quality improvements
- Benefits can be to the business, IT or both
- Examples:
  - Reduced status check calls (IT)
  - Reduces duplication of effort (IT)
  - Increased end user satisfaction (Business)
  - Improved prioritization (IT/Business)
  - Productivity gain through high system availability (Business)
  - Extended Mean Time Between Failures (IT)
Policy

Mission Statement
Scope
Out of Scope
Intent

Policy Statement:
1. Adherence to ITSM Overall Policy
2. Value of Configuration Management
3. Outputs of Configuration Management
4. Requirement-Driven Data Design
5. Configuration Management Process Conformance
6. Ownership
7. Training
8. Enforcement
9. Continual Improvement
10. Modification and Variance
11. Compliance
12. Configuration Review Board (CRB)
13. Relationship with Asset and Inventory Management
14. Relationship with CMMI/SDL and SCM
15. Relationship with Compliance and Risk

➢ Allows for clear communication of expectations
➢ Enables compliance enforcement
➢ Should be approved by senior leadership and published

Governance

➢ ITSM Steering Committee
➢ ITSM Process Owners
➢ Change Advisory Board
➢ Configuration Advisory Board
➢ New item intake prioritization
Design Team

➢ Representatives from across the organization
  • Application Development
  • Infrastructure
  • Service Management
  • Business – Voice of the Customer

➢ Identify stakeholders at the beginning of each project
Project Manager

- Create and maintain project schedule
- Provide status reporting
- Schedule all meetings
- Facilitate project update meetings
- Keep issues log and action plan
- Prepare for and facilitate control board meetings

Leave it to the experts…

- Improves quality of project deliverables
- Wireframe best practices to reduce time
- Always a solution in back pocket
- Intense focus – no distractions of every day work
Project Deliverables

- Roles and Responsibilities
- Logical Flow
- Physical Flow
- ARCI and Work Instructions
- Functional Requirements
- Test Cases
- KPIs/Metrics and Reports
- Audit Involvement

Roles and Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>Wants the work to be done to satisfy a business need</td>
</tr>
<tr>
<td>Initiator</td>
<td>Creator of the RFC</td>
</tr>
<tr>
<td>Change Owner</td>
<td>Owns the RFC through the lifecycle of the change and is ultimately responsible for its success</td>
</tr>
<tr>
<td>Resource Manager</td>
<td>Accepts and assigns tasks for their team</td>
</tr>
<tr>
<td>Implementer</td>
<td>Completes tasks assigned to them</td>
</tr>
<tr>
<td>Approver</td>
<td>Responsible to protect system availability for the business</td>
</tr>
<tr>
<td>Change Coordinator</td>
<td>Reviews RFCs for completeness and policy compliance</td>
</tr>
</tbody>
</table>
Logical Flow

**Activities**
- Origination
- Approval
- Fulfillment
- Closure
- Evaluate Process Performance

**Inputs**
- Service catalog
- Service Requests
- Costs
- Approvals
- Service Desk Calls
- OLA’s
- Required information template(s)
- An event
- Workflow dependencies

**Outputs**
- Completed service requests
- Communication
- Request for Change
- Service Request Reporting

**Providers**
- IT Financial Management
- Portfolio Management
- Configuration Management

**Receivers**
- IT Customers and users
- IT Departments

**Critical Success Factors**
- Clearly defined request categories
- Strictly defined SLA/OLA’s for each category
- Self Service or automated entry of requests
- Automated escalation of overdue request
- Automated Communication tracking
- Links to other processes

- Logical flow provides high level understanding of activities associated with the process.
Physical Flow

**ARCI**

<table>
<thead>
<tr>
<th>Accountability</th>
<th>Ownership of quality and end result of process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Correct execution of process and activities</td>
</tr>
<tr>
<td>Consulted</td>
<td>Involvement through input of knowledge and information</td>
</tr>
<tr>
<td>Informed</td>
<td>Receiving information about process execution and quality</td>
</tr>
</tbody>
</table>
# Work Instructions

## 12.3.20 Escalate

<table>
<thead>
<tr>
<th>Role</th>
<th>A</th>
<th>R</th>
<th>C</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Provider</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requester</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Level Management</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Request System</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Provider Functional Manager</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

- Service Request System informs Requester, Service Provider, SLM and Service Provider Functional Manager of breached SLA/OLA
- Escalate the request to the Service Provider Functional Manager for review/escalation
- Service Provider fulfillment continues during and/or after escalation
- Communication goes to Requester

## Functional Requirements

<table>
<thead>
<tr>
<th>Requirement Description</th>
<th>Related Work Instruction/Policy/Metric</th>
<th>Contact/Owner</th>
<th>Priority</th>
<th>Status</th>
<th>Casing/Days Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgency defaults based on impact (Values = Low, Medium, High)</td>
<td>14.2.20</td>
<td>Req Session</td>
<td>01 - High</td>
<td>Developed</td>
<td>0.75</td>
</tr>
<tr>
<td>ROLE: Based on role, some roles should be able to change Priority</td>
<td>14.2.20</td>
<td>Req Session</td>
<td>02 - Medium</td>
<td>Developed</td>
<td>0.75</td>
</tr>
<tr>
<td>Priority should be calculated based on impact and Urgency (see Impact/Urgency matrix in POA Specifications document)</td>
<td>14.2.20</td>
<td>Req Session</td>
<td>01 - High</td>
<td>Developed</td>
<td>1.50</td>
</tr>
<tr>
<td>Impact is calculated based on the following fields: Environment, Type, Criticality of Service and Organizational Impact (see Impact/Urgency matrix)</td>
<td>14.2.20</td>
<td>Req Session</td>
<td>01 - High</td>
<td>Developed</td>
<td>1.60</td>
</tr>
<tr>
<td>Ability to relate incidents through the CMDB to Parent Incident</td>
<td>14.2.25</td>
<td>Req Session</td>
<td>03 - Low</td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td>When Priority = 1, send notification to Incident Manager</td>
<td>14.2.20</td>
<td>Req Session</td>
<td>01 - High</td>
<td>Developed</td>
<td>0.60</td>
</tr>
<tr>
<td>Add a Description field that remains static throughout the life of the ticket - this is where the initial description of the issue would be placed - Located between Location and Configuration Item</td>
<td>14.1.10</td>
<td>Req Session</td>
<td>02 - Medium</td>
<td>On Hold</td>
<td>1.00</td>
</tr>
<tr>
<td>Add a Resolution field that is required when Status is Resolved or Closed (this should be after Work Notes)</td>
<td>14.5.45</td>
<td>Req Session</td>
<td>02 - Medium</td>
<td>On Hold</td>
<td>1.00</td>
</tr>
<tr>
<td>Need an easy way to differentiate between Work Notes and Customer Notes and easy</td>
<td>14.2.30</td>
<td>Req Session</td>
<td>02 - Medium</td>
<td>Developed</td>
<td>2.00</td>
</tr>
</tbody>
</table>
Test Cases

TEST CASE SPECIFICATION FORM

Project No.  
Project Name: Service Now Incident Management
Page Of

Test Case Description:
Not having the current version of the Burgess software.

Build No. Run No. Case No.  Case Revisions No. 1
Date Last Modified: 6/7/08

<table>
<thead>
<tr>
<th>Cond</th>
<th>Test Condition</th>
<th>Input Data</th>
<th>Expected Results</th>
<th>Pass/Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>14.3.10 Incident Analyst</td>
<td>Change Status to Accepted To/Your Name. Change Status to Accepted in the drop down menu. Click on Unlink button.</td>
<td>Status changes to Accepted and your name appears in Assigned To Page listing all incidents return</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>21</td>
<td>14.3.16 Incident Analyst</td>
<td>Reopen the Incident for editing on Incident 5000000</td>
<td>The incident form appears with the incident you created. The Assigned to field contains your name.</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>22</td>
<td>14.3.16 Incident Analyst</td>
<td>Change Status to Work in Progress</td>
<td>Status changes to Work in Progress</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>23</td>
<td>14.3.00 Incident Analyst</td>
<td>Type &quot;Worked on this ticket&quot; in the Work Notes field. Right click on blue bar at the top of the incident form and select Save</td>
<td>Work Notes moves to Summary area and saved page does open. Work Notes field is cleared.</td>
<td>Pass/Fail</td>
</tr>
</tbody>
</table>

Measuring Process Effectiveness

CSF: Implemented centralized, repeatable and consistent change process valued by both business and IT

<table>
<thead>
<tr>
<th>KPI</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time to process change</td>
<td>Average time AOs are in work status by priority and type</td>
</tr>
<tr>
<td>% of changes causing incidents</td>
<td># changes that create high-impact incidents</td>
</tr>
</tbody>
</table>

CSF: Public and communication of the current status of changes through a Forward Schedule of Change

<table>
<thead>
<tr>
<th>KPI</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective communication to all users regarding the change</td>
<td>The Forward Schedule of Changes (FSC) reflects real-time status of changes</td>
</tr>
<tr>
<td>Changes entered earlier</td>
<td># changes by Urgency timeframe by group</td>
</tr>
</tbody>
</table>

- Critical Success Factors are supported by Key Performance Indicators and Metrics
Audit is not the enemy…

- Build processes with audit requirements in mind
  - Process findings
  - Design findings
  - COBIT minimum requirements

Processes Implemented

- Configuration Management
- Change Management
- Incident Management
- Request Management
Configuration Management

➢ Value is in increased efficiency and effectiveness of other ITSM processes
- Relationships
- Impact assessment
  • Maintenance windows
  • Criticality tier
  • Causality
  • Collision control

CMDB Structure

<table>
<thead>
<tr>
<th>Category</th>
<th>Class</th>
<th>Configuration Item (CI)</th>
<th>Service Attribute</th>
<th>Common Attributes</th>
<th>Specific Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle</td>
<td>ORA</td>
<td>Oracle Server Instance1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSSQL</td>
<td>SQL</td>
<td>SQL Server Instance1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DB2</td>
<td>DB2</td>
<td>DB2 Instance1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IMS</td>
<td>IMS</td>
<td>IMS Instance1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB</td>
<td>UDB</td>
<td>UDB Instance1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Functional requirements for development

Relationship Matrix
Real World Relationships

Any deliberate action that alters the form, fit, or function of Configuration Items.

Assess and mitigate risk

Collision control

Change Advisory Board provides oversight of higher priority changes

Change Management
Change Process Successes

- Impact + Urgency = Priority
- Approvals dictated by Priority
- Dependencies on other teams handled with change tasks
  - Must be accepted to schedule
- Publish Forward Schedule of Changes
- Provide management with actionable reporting

Change Priority

- Urgency
  - Lead Time
  - Entry Date to Proposed Start Date
- Impact
  - Based on Risk to the Business
  - Answers to eight questions calculates Impact score
- Priority
  - Dictates Approvals required
Urgency

<table>
<thead>
<tr>
<th>Urgency</th>
<th>Lead Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
<td>&lt; 3 Days</td>
</tr>
<tr>
<td>High</td>
<td>3-7 Days</td>
</tr>
<tr>
<td>Medium</td>
<td>8-30 Days</td>
</tr>
<tr>
<td>Low</td>
<td>&gt; 30 Days</td>
</tr>
</tbody>
</table>

Urgency is automatically calculated at the time the change is entered into the system. Urgency is the difference between the date the change is entered and the proposed implementation date.

Impact

[Impact questionnaire details]

- [ ] External Customers
- [ ] Part of the functionality will not be available
- [ ] 15 to 60 minutes
- [ ] No Outage to Customer
- [ ] 1 department
- [ ] Moderate (15 to 60 minutes)
- [ ] Yes
- [ ] Yes
- [ ] Yes
Priority Matrix

<table>
<thead>
<tr>
<th>Urgency</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
<th>Top</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>CM 4</td>
<td>CM 4</td>
<td>CAB 2</td>
<td>CAB 2</td>
</tr>
<tr>
<td>Medium</td>
<td>CM 4</td>
<td>CM 3</td>
<td>CAB 2</td>
<td>CAB 2</td>
</tr>
<tr>
<td>High</td>
<td>CM 3</td>
<td>CAB 2</td>
<td>CAB 2</td>
<td>ECAB 1</td>
</tr>
<tr>
<td>Top</td>
<td>CM 3</td>
<td>CAB/ECAB 2/1</td>
<td>ECAB 1</td>
<td>ECAB 1</td>
</tr>
</tbody>
</table>

➢ Higher priority requires increased level of scrutiny prior to approval

Approvals

<table>
<thead>
<tr>
<th>Approval Body</th>
<th>Approval Medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECAB</td>
<td>On demand Virtual / Electronic / In person / Phone</td>
</tr>
<tr>
<td>CAB</td>
<td>BI - weekly</td>
</tr>
<tr>
<td>Change Manager (CM)</td>
<td>Virtual / Electronic</td>
</tr>
<tr>
<td>CM/Standard</td>
<td>Virtual</td>
</tr>
</tbody>
</table>

➢ Lower priorities approved virtually
## Forward Schedule of Change

<table>
<thead>
<tr>
<th>No.</th>
<th>Change Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>CHG24711 - WSS - Deploy to production - Release 02.02 Build 104/100 to test/uni.</td>
</tr>
<tr>
<td></td>
<td>CHG24655 - CA65 Plus Maintenance CICS Test (09:00 to 16:00)</td>
</tr>
<tr>
<td></td>
<td>CHG24930 - SP #355/6 - Small Group Personnel - Letter Changes (09:00 to 16:15)</td>
</tr>
<tr>
<td>6</td>
<td>CHG24635 - Copy CRP production database to quality environment database (16:00 to 18:00)</td>
</tr>
<tr>
<td></td>
<td>CHG24452 - Create M4C letter processing within Workday (20:15 to 21:00)</td>
</tr>
<tr>
<td></td>
<td>CHG24645 - PDQ - RAPS - Create new table and add 2 columns to T_ZIP_APP (06:15 to 20:00)</td>
</tr>
<tr>
<td>7</td>
<td>CHG24700 - MR17 - Lotus Policy Update - Production (06:00 to 18:15)</td>
</tr>
<tr>
<td></td>
<td>CHG24647 - IT - Technical Updates (06:00 to 18:15) (Selected: 38 machines)</td>
</tr>
<tr>
<td></td>
<td>CHG24640 - IT - Internal - Lotus Group - Pre-Pro (06:00 to 18:15)</td>
</tr>
<tr>
<td>8</td>
<td>CHG24701 - P - Lotus Security Compliance (06:00 to 18:15)</td>
</tr>
<tr>
<td></td>
<td>CHG24727 - Modify Postini Production Configuration (06:00 to 18:15)</td>
</tr>
<tr>
<td>9</td>
<td>CHG24660 - Install Complete package of Oracle Client 8i / 9i / 10g all Informatica servers (06:00 to 18:15)</td>
</tr>
<tr>
<td>10</td>
<td>CHG24732 - PDF extract for new value network (12:00 to 12:15)</td>
</tr>
<tr>
<td>11</td>
<td>CHG24730 - Update of Service with Makroean's Oracle Client 9i / 10g / 11g (20:00 to 20:15)</td>
</tr>
</tbody>
</table>

## Incident Management

- Any interruption in the normal operation of a service
- Return service to normal state or provide workaround as quickly as possible
Incident Process Successes

- Right-sizing groups managed
- Impact + Urgency = Priority
- Priority drives escalation
- On-call Rota
- Major Incident for top priority

Group Set Up

- Best practice – 10ish
- Current state – over 300
  - One for every system/application
- Best we could do – about 125
  - One for every manager
  - Use rules to delineate notification preferences
    - On Call Rotation
    - Subscription-Based Notification
    - Escalation integration with AlertFind
Impact Factors

**Impact**

<table>
<thead>
<tr>
<th>Extent of Organizational Impact Environment</th>
<th>One Customer and Not Expected</th>
<th>Several Customers Affected or An Hour</th>
<th>Whole Org, Complete Dept, or Building of External Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>1</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>I</td>
<td>2</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Q</td>
<td>3</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>P</td>
<td>4</td>
<td>7</td>
<td>10</td>
</tr>
</tbody>
</table>

**Criticality of Service**

<table>
<thead>
<tr>
<th>Type</th>
<th>Informational</th>
<th>Request for Service</th>
<th>Degradation</th>
<th>Disruption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Tier 2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Low -</td>
<td>2 - 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>6 - 12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High -</td>
<td>13 - 16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top -</td>
<td>17 - 20</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Urgency – The Human Factor

**Urgency**

<table>
<thead>
<tr>
<th>Urgency Factor</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desired Service Restoration from ticket creation</td>
<td>&gt;2 days (Low Impact default)</td>
<td>1-2 days (Medium impact default)</td>
<td>Requesting Same day (High/Top default)</td>
</tr>
</tbody>
</table>
Priority

Priority drives process and escalation

<table>
<thead>
<tr>
<th>URGENCY</th>
<th>IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td>Low</td>
<td>4</td>
</tr>
<tr>
<td>Medium</td>
<td>4</td>
</tr>
<tr>
<td>High</td>
<td>3</td>
</tr>
</tbody>
</table>

Escalation

- Ticket can be accepted from Blackberry
- Resolution escalation being done manually
On-call Rota

- Notification to right people at the right time
- Incidents assigned to group
- Notification to all group members OR follow on-call rota rules
  - Rotate through members
  - Notify a group device
  - Notify specific member(s) of group

Major Incident – Priority 1

- Task driven
  - Parallel vs. Serial
- Stakeholder communication
  - News scroller
  - Subscription-based
Request Management

- Simple request forms and powerful delivery plans
- Two primary tracks
- Not just for IT!
- Lean first, then automate

Employee Onboarding

- Focus group feedback indicates this is biggest area of pain
- Several different systems with various information and lead time requirements
- Need to complete several key requests, then we can bundle
- Working on physical security, IT security, workstation requests (PC, phone, software)
- HR is assisting by pushing reminders to hiring managers at onboarding milestones
IT Intake Processes

- Project Management
- Application Development
- Infrastructure Engineering
- Data Warehouse
- Networking
- Job Scheduling

IT Infrastructure Project Intake

Infrastructure projects are those where one or more infrastructure division resources (engineering, strategic, network, operations, security, etc.) are required. Infrastructure projects are often offshoots from Strategic Projects, but also may be standalone projects.

Project requests will be evaluated by the Governance Team using a standardized scoring model that considers the business, operational and financial impact of each project request. Request scores are tabulated and presented biweekly to a central Governance Committee, where requests are discussed, interdependencies identified, and resource availability is determined, thereby leading to a final prioritization. Projects are started or delayed based on this Committee's decision.

<table>
<thead>
<tr>
<th>What is the title of your project?</th>
<th>What is your requested project start date?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select one category that best fits your project type.</th>
<th>What is the desired project implementation date?</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Information</td>
<td>- Less than 1 month</td>
</tr>
<tr>
<td>Mandatory</td>
<td>- 1 to 3 months</td>
</tr>
<tr>
<td>Strategic</td>
<td>- 3 to 6 months</td>
</tr>
<tr>
<td>Security, Compliance or Disaster Recovery</td>
<td>- Greater than 6 months</td>
</tr>
</tbody>
</table>
Request Status

- Allows requester to follow requests via self service

Business Uses

- Business Event Management
  - Intradepartmental support requests
  - Distribution methods
    - Round robin
    - Specialty assignment
    - Push or pull queue

- Funding Request
  - Replaces five previous funding methods
  - Amazingly complex approval process fully automated
Organizational Change Management

- Executive Sponsorship
- Awareness Communication
- Training
- User Guide
- Release Notes
- Stakeholder Satisfaction Surveys
- Continual Improvement

IT Newsletter Announcement

On the move: Implementation of Service-now

By Susan Ryan

Tivoli Service Desk has been an unsupported product for over three years now, and by the end of 2009 we hope to be able to retire the product. It will be replaced by a new IT Service Management tool from a company called Service-now.com. We have branded the application IT2B, to represent the idea that this is how IT will deliver services to the business.

Service-now.com has created quite a buzz in the industry, having created a feature-rich and scalable tool that is extremely easy to configure and is relatively inexpensive as compared to similar functionality in other tools. It is offered as software as a service and can be hosted at their facility. As many of their larger customers do, we chose to host it here due to concerns about data privacy and ability to create interfaces between it and other IT Service Management tools, such as event management via Tivoli TEC and notification via AlertFind.

The application is hosted on the mainframe on Linux and uses an Oracle database, which will also store any attachments made to tickets. It is 100% browser-based, so can be accessed via the BCBSSM intranet at any time. Approvals can be made via email and even through the Blackberry.

On February 19, IT2B went live with the Change and Configuration Management processes. The Change Management process was completely re-engineered by a team that included mainframe and distributed applications development, infrastructure, business, and process representatives. The basic infrastructure for the Configuration Management database was put into place, and over the next year or so the CMDB will be populated with business services, applications, and the infrastructure and network gear on which they reside.
Training

- Awareness/Overview
- Recorded Webinar
- Hands-on Classroom
- User Guide
User Guide

What is Incident Management?

Roles and Responsibilities

The Incident Management Tool and Processes

It’s not amazon.com

Increases adoption rate

Release Notes

Don’t surprise them with new functionality

Upgrades vs. planned application changes

Update User Guides and training materials

Subscription-based notification

FAQs
Stakeholder Satisfaction

- Collect information to baseline process performance and drive improvements
- Ask the right questions!
  - Keep it short
  - How will we use the information we collect?
- Transactional feedback
  - “How well did we meet your expectations on this transaction?”

Continual Improvement

- Phased approach to application releases
  - They can only handle a certain amount of newness at a time
- Feedback from stakeholders about process “discomfort”
- Information gleaned from process metrics
- When are we done? Never!!!
Results/Metrics

➢ Key Performance Indicators
➢ Critical Success Factors
➢ Metrics
➢ Reports
  • Push vs. Pull
  • Frequency
➢ Customer Satisfaction

➢ Emergency/Expedited = Break/Fix (new applications implemented at year end – with defects!)
➢ Standard = Preapproved (new standard change templates added)
- 68% of normal changes submitted 7 days or less in advance
- Increased integration between change and incident will provide data to assess whether high urgency has a direct relationship to business impact

- Request source is audited
- Allows us to determine best place for integration efforts
- Provides data for proactive problem management
- Training for new Service Desk reps
Service Desk Transactional Survey

- 51% response rate in 2008
- 35% exceeded expectations
- 59% met expectations

IT Service Desk Satisfaction Survey

You contacted the IT Service Desk on 03/02/2009.

How well were your expectations met on this service transaction?

- Exceeded Expectations
- Met Expectations
- Did Not Meet Expectations

Would you like to share any comments?

The service desk is understandably busy so there is a long wait time but as soon as I have a service rep the issue is usually solved quickly. I am a new employee and call them frequently and I know they can give me answers right away. Thank you for all your help! Yesterday I called twice, once for our servers not working and another to get a new version of Excel installed on my computer. Tool was down in 15 minutes and Facets was up and running in about 2 hours.

Do you have more comments to share? Ideas about how we can improve our service quality? Click yes and the Service Desk manager will call you to collect your comments/ideas.

- Yes  No

Infrastructure Project Report

- Provides weighting, ranking, and status all in one view

<table>
<thead>
<tr>
<th>Project title</th>
<th>Score weighted</th>
<th>Overall priority</th>
<th>Status budget</th>
<th>Status risk</th>
<th>Status schedule</th>
<th>Status scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modular and Power Conference Room Plan</td>
<td>8.55</td>
<td>01</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>Establish VPN Access for Trumbio</td>
<td>8.55</td>
<td>01</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
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<tr>
<td>Data Center Move Project</td>
<td>6.75</td>
<td>02</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
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<tr>
<td>Replace filing cash processing remit</td>
<td>7.75</td>
<td>03</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>Oracle UCM Email/Content Archiving Project</td>
<td>6.75</td>
<td>04</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
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<tr>
<td>Distributed Build Release Process Improvements</td>
<td>7.02</td>
<td>06</td>
<td>Y</td>
<td>O</td>
<td>O</td>
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<tr>
<td>Wireless Employee Access</td>
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<td>06</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
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<tr>
<td>Discover Phase 2 - Roll Based Access Control</td>
<td>7.22</td>
<td>02</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
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<tr>
<td>Administrative Simplification</td>
<td>6.75</td>
<td>08</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>FSW 0000</td>
<td>7.75</td>
<td>09</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>ITIL 1.13 A Build 2.2</td>
<td>8.12</td>
<td>10</td>
<td>Y</td>
<td>O</td>
<td>O</td>
<td>Y</td>
</tr>
</tbody>
</table>
You don’t need automation for IT Service Management…

- We use Service-now.com – and love it!

ITIL Resources

- itSMF
  - Local Interest Group
  - www.itSMFUSA.org
- Publications
  - Office of Government Commerce
  - Five Lifecycle ITIL v3 books
- Webinars
Whew! That’s all folks!

- Any last questions?
- Be sure to complete your surveys
- Contact me to compare notes:
  - Susan Ryan@bluecrossmn.com