

THE **BREAKTHROUGH** SERIES

from
**Thought
Rock**

The Presentation Will Begin At 12PM EST



**”Using Models for Incidents,
Problems, Changes and Requests”**

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About ITSM Academy



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 - ✓ ITIL Foundation and Managers Bridge
 - ✓ ITIL Lifecycle, Capability and MALC
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Welcome!

Agenda



- What is a model?
- Using models for common processes
 - ✓ Incident
 - ✓ Problem
 - ✓ Request
 - ✓ Change
- Getting started with models

Thanks for joining us today.
Please use the chat feature to send in your questions.

What is a Model?

- A pre-defined set of procedures for handling recurring incidents, problems, changes, requests
- Ensures the process follows a prescribed path or timeline
- Predicts categorization and priority (impact/urgency)
- Can be automated
- Avoids “reinventing the wheel” for each situation

Model Elements

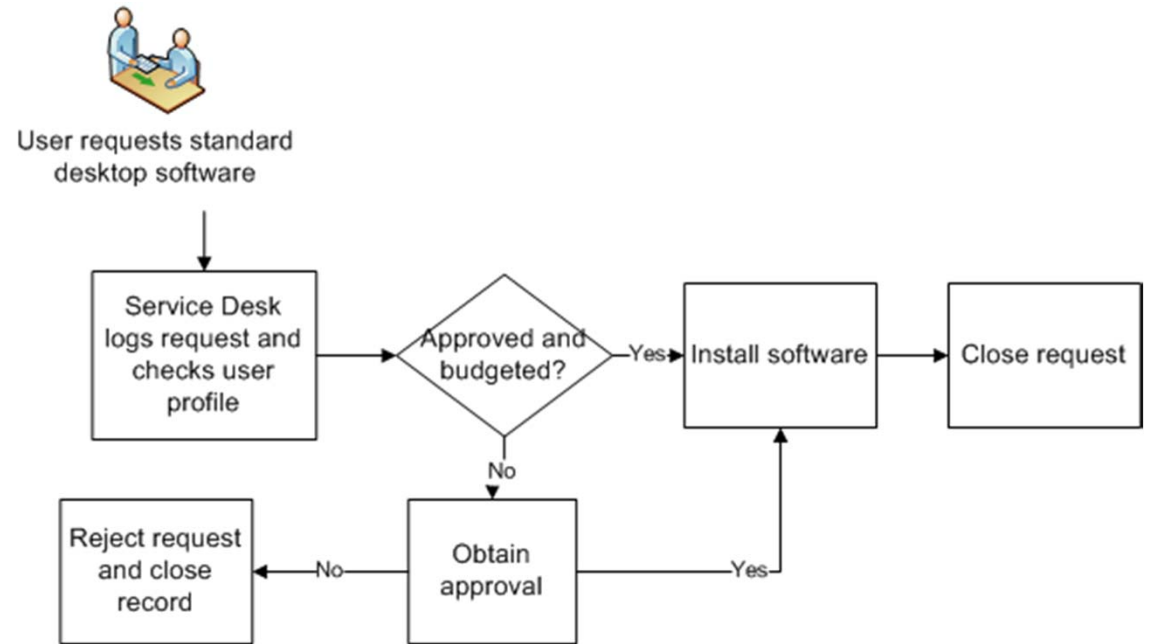
- ✓ Steps to be taken
- ✓ Sequence of actions
- ✓ Responsibilities
- ✓ Timescales and thresholds
- ✓ Escalation procedures
- ✓ Steps to preserve evidence

Models ensure consistent handling to meet SLA targets.

Models Can Be Very Simple

- Basic models

- ✓ Expedite low risk, high volume situations
- ✓ Become part of “standard operating procedures”

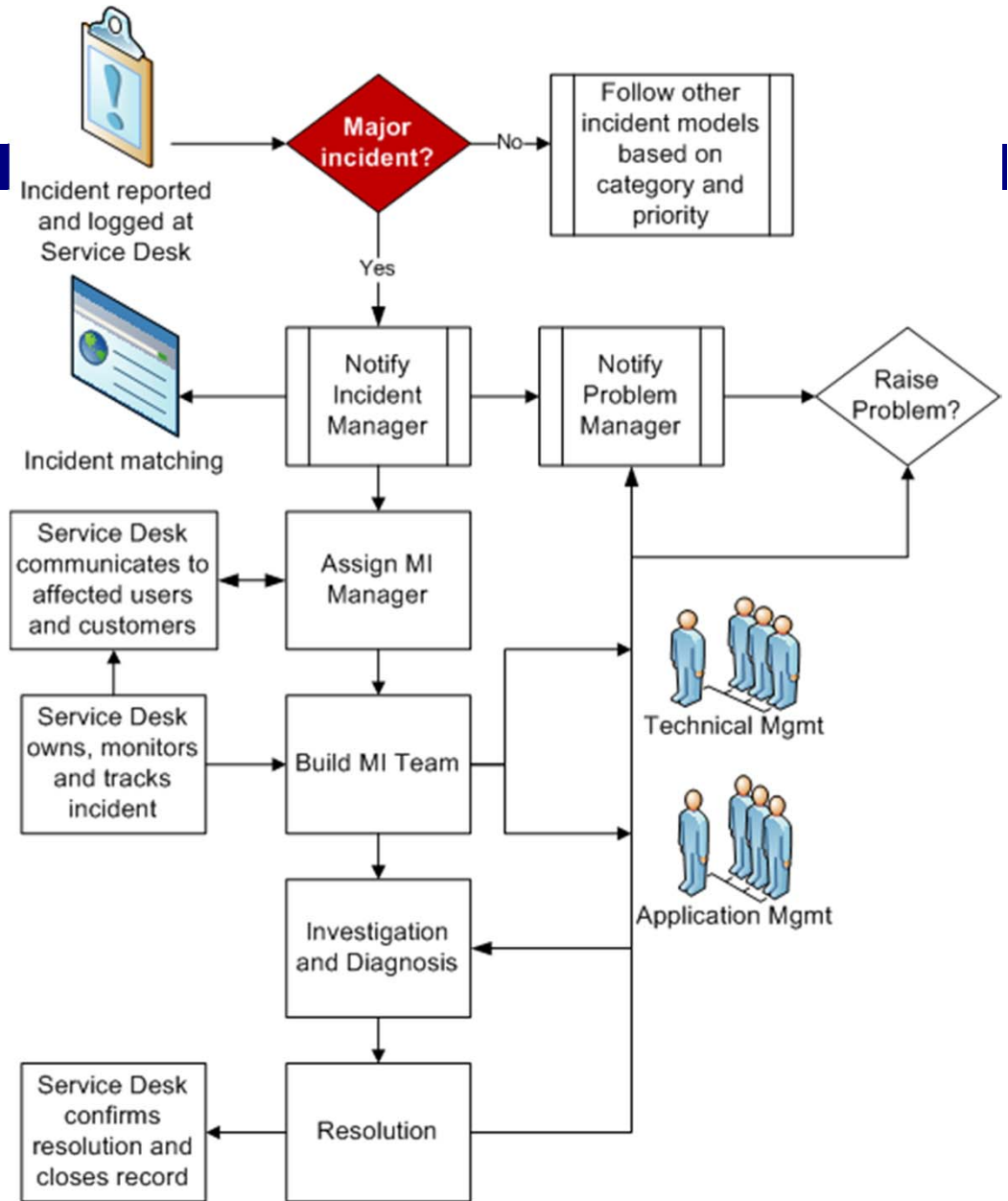


Request for software model

Or Very Complex...

- **Complex models**

- ✓ Predict procedures, resources and timelines
- ✓ Avoid surprises and bottlenecks
- ✓ Define the “rules of engagement” in unique, high impact situations



Major Incident Model



Using Models for Common Processes

Incident Models

Many incidents involve dealing with something that has happened before and may well happen again.



- Incident models can be useful for handling
 - ✓ Operational incidents from events
 - ✓ Security incidents
 - ✓ Capacity incidents
 - ✓ Common desktop incidents
 - ✓ Incidents requiring a site visit
 - ✓ Major incidents

Problem Models



Many problems will be unique and require individual handling.

- Problem models can be useful for handling
 - ✓ Dormant problems
 - ✓ Underlying problems
 - ✓ Repetitive problems (across domains, regions, etc.)
 - ✓ Supplier-dependent problems
 - ✓ Major Problems

Problem models will also help define the skills required to identify root cause and permanently remove the error.

Request Models

A service request is a user request for a proven, repeatable, preapproved and proceduralized service.

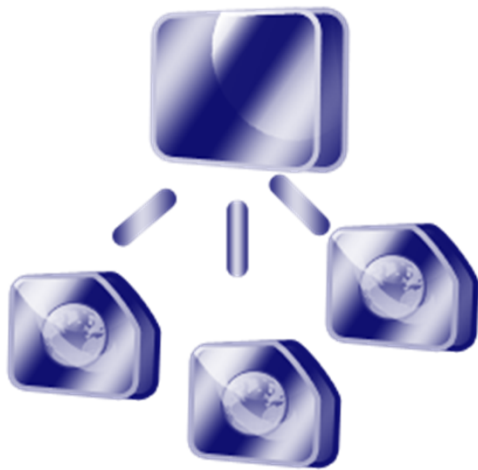
- Request Models can be useful for handling
 - ✓ New hires
 - ✓ Moves
 - ✓ Desktop software installation
 - ✓ Requests for access to a service
 - ✓ Requests for information or help (questions)
 - ✓ Standard procurements and services



Request models should include thresholds for scope, budget and authorities.

Change Models (1)

Change models will define the entry into and rigor of Change Management.



- Change models will
 - ✓ Communicate what people should expect for each type of change
 - ✓ Define the steps for a specific type of change
 - ✓ Be based on risk and impact
 - ✓ Define authorities and approval
 - ✓ Describe the level of impact assessment
 - ✓ Define timelines and possibly scheduling
 - ✓ Describe documentation requirements

Change models can reduce the level of bureaucracy associated with Change Management.

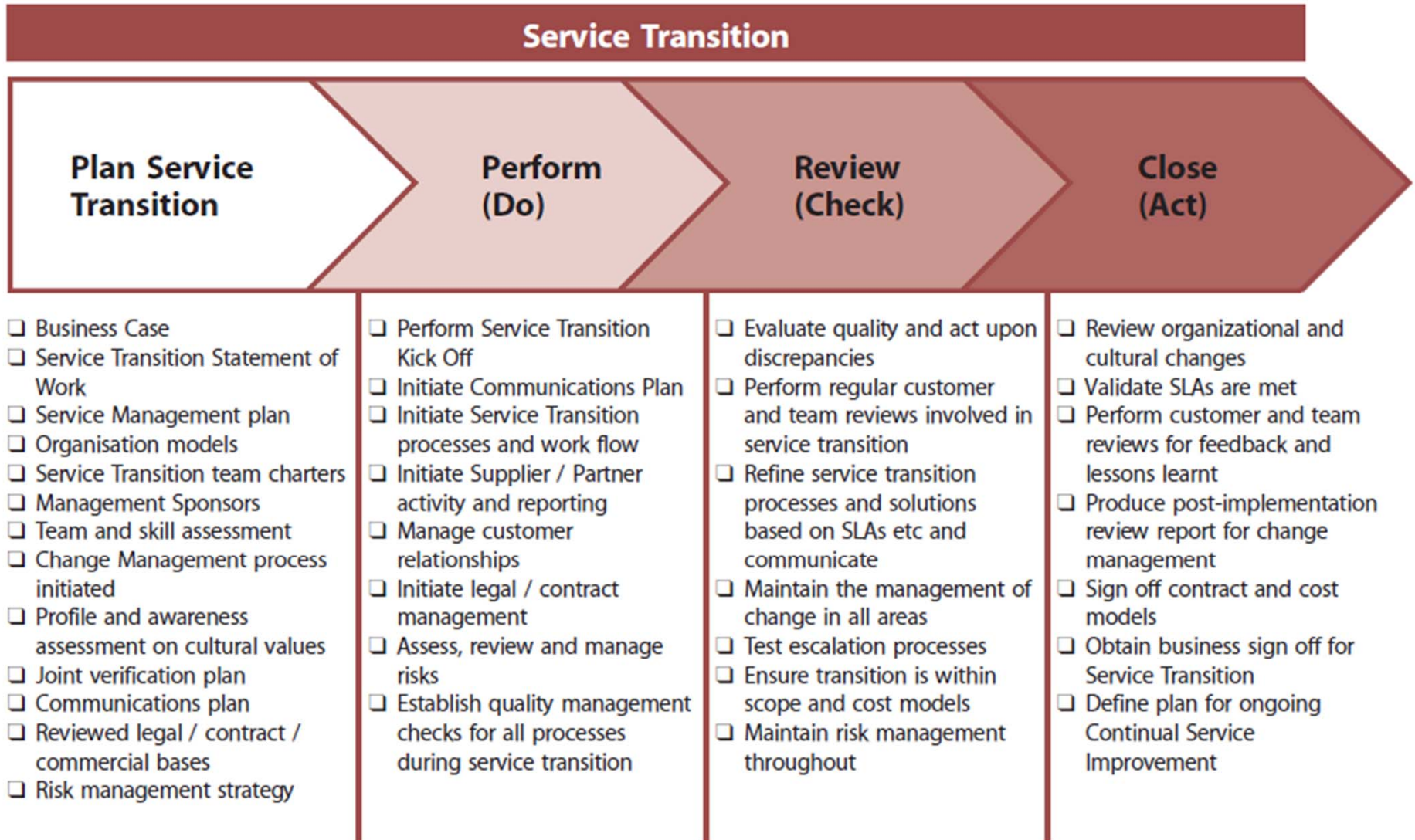
Change Models (2)

- Change Models can be useful in handling
 - ✓ Standard changes
 - ✓ Major technology or application changes
 - ✓ Local changes
 - ✓ Emergency changes
 - ✓ Changes to the Service Portfolio
 - ✓ RFCs to a specific service
 - ✓ Project scope change proposal
 - ✓ Operational activities such as tuning, no-impact reboots and planned maintenance



There should be a separate model for each approved standard change.

Change Model for Outsourcing (ST Figure 5.3)



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Getting Started with Models (1)



- Review incident, change, problem and request records for the most common or frequent types of situations
- Build initial models from previously successful and timely procedures
- Build new models as situations arise and lessons learned
- Make the models readily available and easy to understand – communication is key to success!

Getting Started with Models (2)

- Adapt the models as necessary
- Put every model under Change Control
- Whenever possible, automate the models
- Report on the use and success of each model
- Keep it simple!



Want to Learn More?

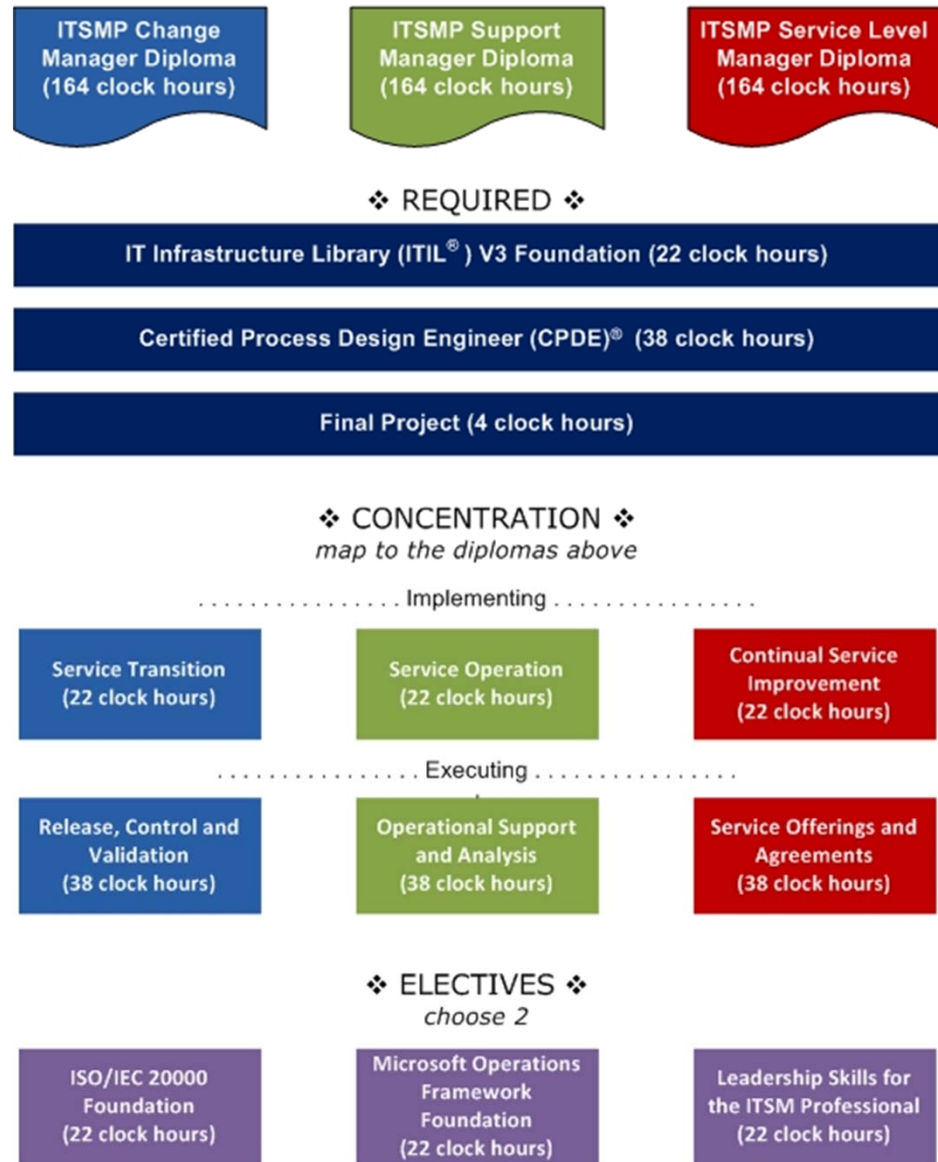
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Questions?



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