5 Ways Process Management Tools Can Ensure ITIL Implementation Success

The ITIL framework represents the most advanced and best practice approach to IT service management. However, we all know it's a long way from the design of a process to its successful implementation.

Learn how active process automation tools can take a process design from a passive documentation file, to an active achievement. Frank Herman of LeanVista LLC will review 5 unique ways how these management tools create an environment of success for your ITIL implementation.

Key Learnings:
- 5 ways how process management tools can ensure ITIL implementation success
- General capabilities of a workflow engine

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Disclosure

- LeanVista is a business partner of Swift Software, manufacturer of JobTraQ Workflow and Task Automation software platform

- LeanVista manufactures the CareTran[tm] Care Coordination healthcare solution, based in part on the JobTraQ platform

- LeanVista is an ATA-in-training for the B-Wyze Group of companies

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Definitions

- Process Management
  - Process management is the ensemble of activities of planning, creating and monitoring the performance of a process. ITIL is, in part, a process management approach
  - In ITIL, Continual Service Improvement activities are embedded across the ITIL Service Lifecycle

- Process Management Tools
  - A tool is any physical item that can be used to achieve a goal, especially if the item is not consumed in the process.
  - Process Design/Diagramming Tools e.g. "Swim lane diagrams" etc.
  - Process Automation Tools e.g. JobTraQ, Lombardi
    - Definition
    - Execution
    - Data capture
  - Process Business Intelligence Reporting e.g. Business Objects, Crystal Reports

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What is ITIL?

- Global best practice for IT service management, rooted in IT but applicable to technology-enabled business processes as well

- A framework identifying specific service management processes, their inputs, outputs and integration, but not the specific processes themselves – that's up to you

- A means to unite an organization around a common vision e.g. "There is the end vision, here's where we are today and how we are getting there". As such, it's a great "check off " aid e.g. Not necessarily how to do something (although much guidance is provided), but more like "Are we doing this process at all"?

- A way to perform Continual Process Improvement

- A common language adopted across the globe

- A means to individual career growth, advancement and increased value contribution to the enterprise

What is ITIL Implementation Success?

- ITIL is a framework

- Implementing the ITIL framework is really about successfully *implementing service processes* in alignment with the ITIL framework *in sync with your environment and specific needs*

- Success comes in many forms

  - Quantitative: Achieving a SMART goal e.g. "Solve 65% of Tier 1 tickets without escalation to Tier 2 in 24 hours"

  - Qualitative e.g. "Organizational epiphany: Maybe ITIL / Process Automation could improve customer satisfaction. Let's try a pilot."

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Summary of 5 Ways…

- Process management tools unite an organization's People, Process (ITIL *or* Business Processes), and Technology in a Seamless Cost Effective manner that significantly Increases Productivity and Profitability:

  1. Increased Organizational Visibility
  2. Real-Time Speed
  3. Defined Quality
  4. Accountability / Regulatory Compliance
  5. Improved Financial Performance

- Resulting in an <u>improved capability to compete</u>

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- Let's go on an ITIL process automation journey…

  - ITIL framework

  - From framework to process

  - From process to swim lane diagram

  - From diagram to automation

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The ITIL Framework

Source: www.itsmwatch.com

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From Framework to Process

ITIL® Reference Processes – Detail Level 0: ITIL® Service Lifecycle

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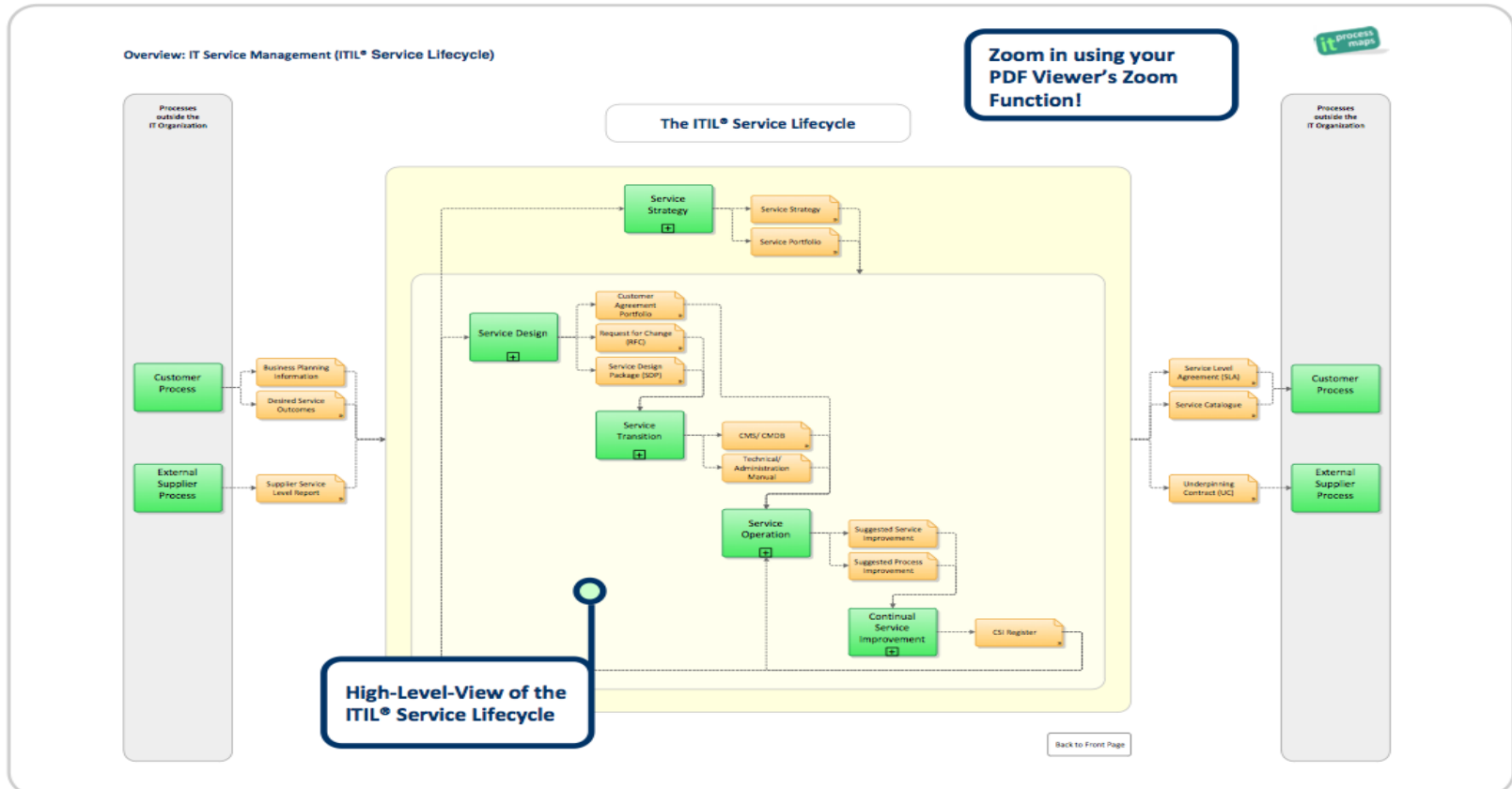
From Process to Swim Lane Diagram
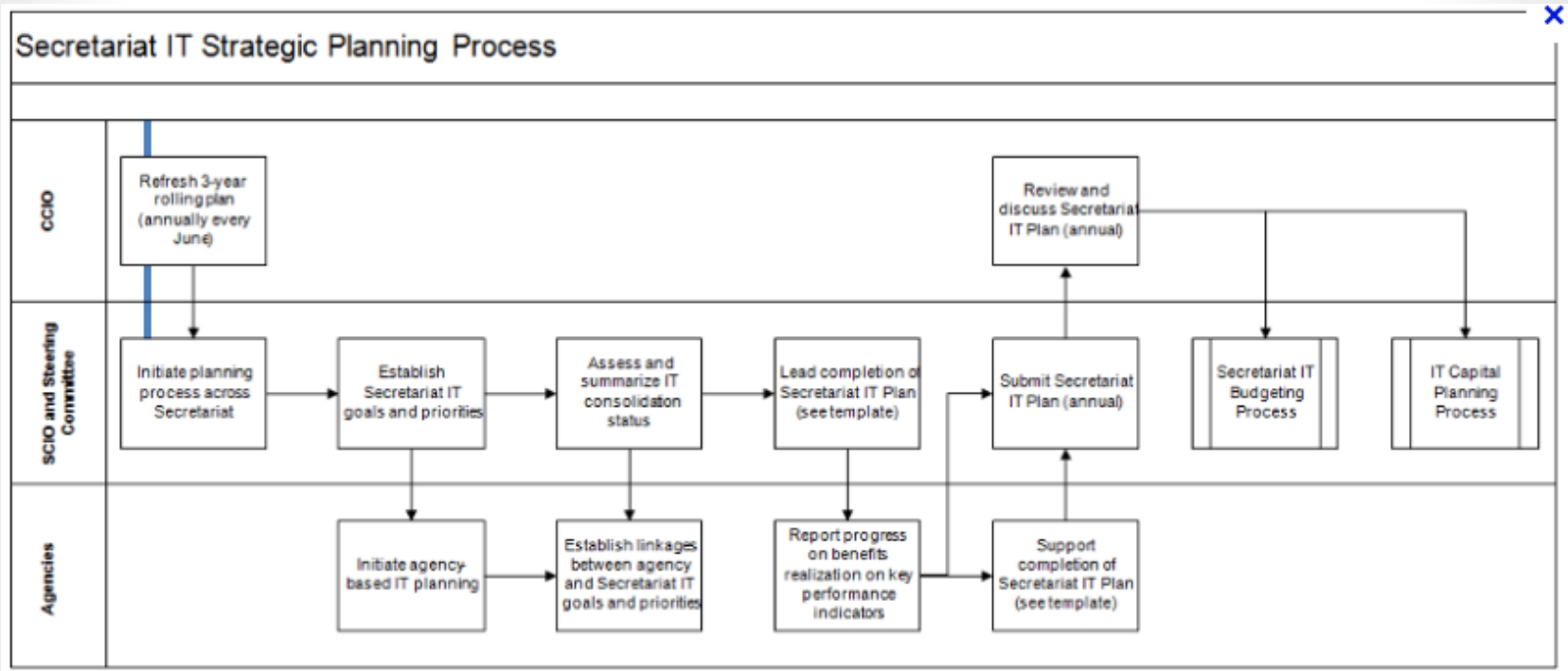
Source: State of Massachusetts

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Process Automation Examples

Examples of How Process Management Tools Ensure ITIL Implementation Success Utilizing a Workflow/Task Automation Platform

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Create Your Process Tasks

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Define Workflow Rules

Source: Swift Software, Inc.

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Organizational Visibility Model

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Macro Organizational Visibility *LEAN*VISTA

Source: Swift Software, Inc.

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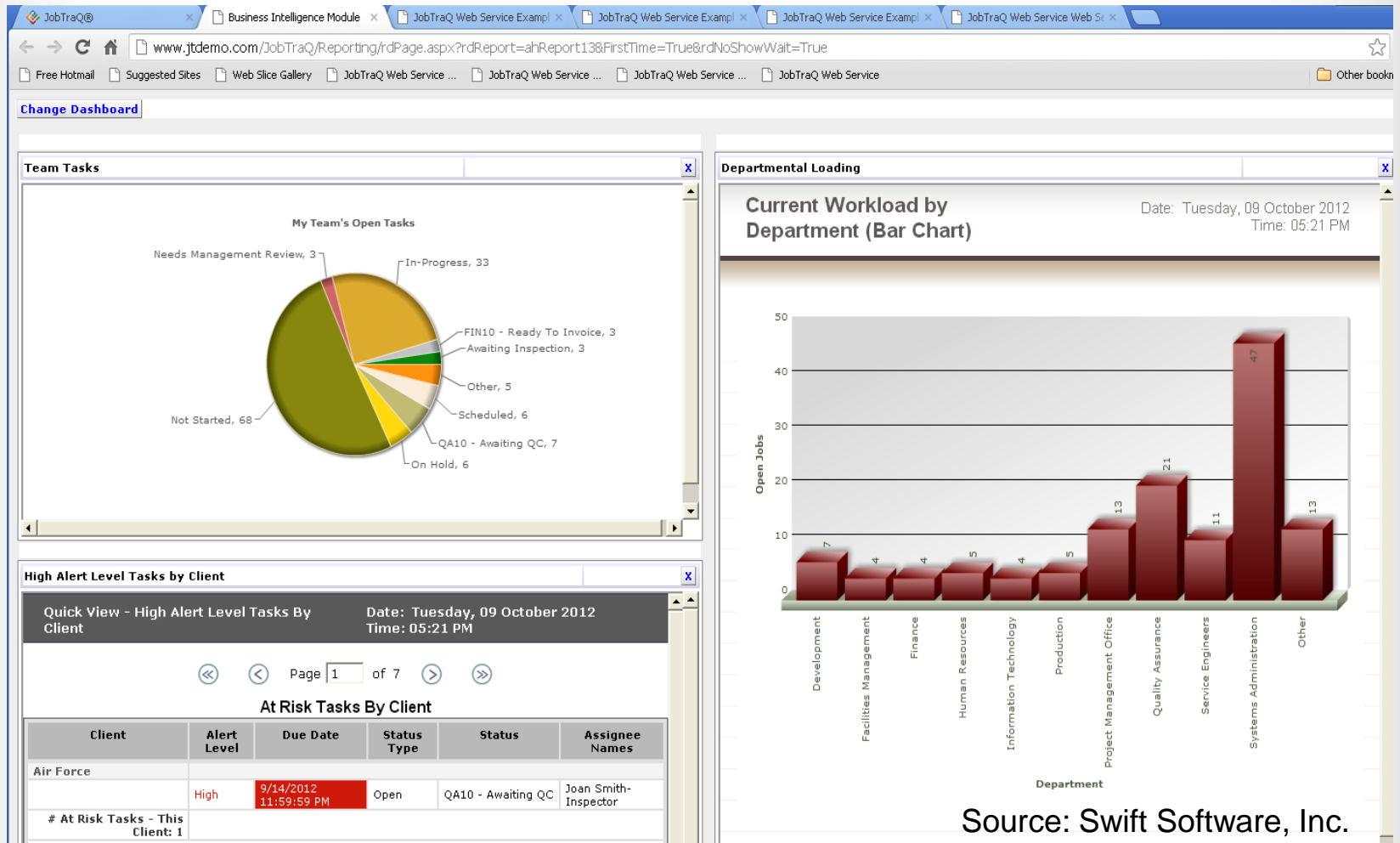
Resource Visibility

Angus Smith's resource utilization report at the start of the day.
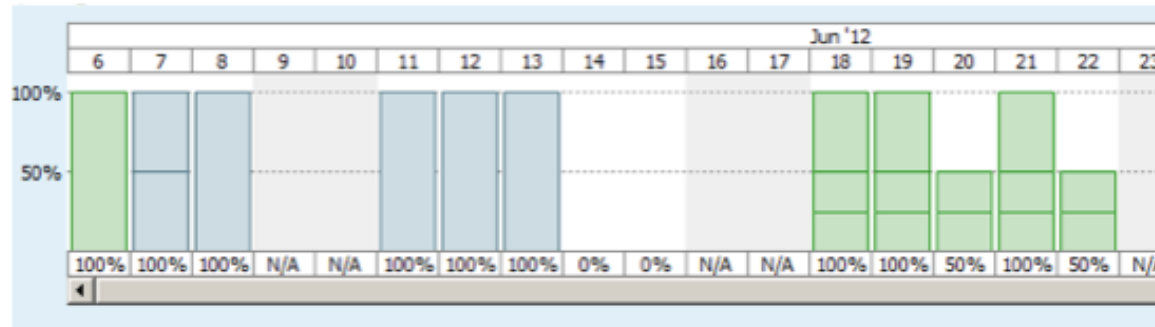
Angus Smith's manager added a task for June 18th which now shows Angus over utilized beyond capacity.
Angus will need to work late or perhaps miss the milestone unless another resource is assigned to this task.
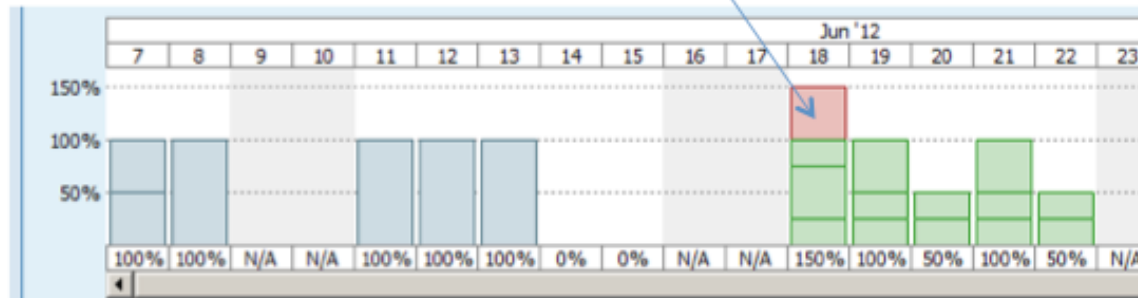
Dan Brown, Angus Smith's manager, wants to figure out who else on the finance team is available to pick up
the task so that Angus is not over utilized (see next two slides).

Source: Swift Software, Inc.

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Task Visibility

Source: Swift Software, Inc.

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Security

Source: Swift Software, Inc.

SOX Audit Trail

Source: Swift Software, Inc.

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Helps ITIL Service Strategy

- Automation is good at remembering things and doing repetitive tasks; humans are good at inventing things. To each his own. Why devise a strategy that plays into weakness?

- Global collaboration is easier with it; difficult/impossible without it.

- It makes financial sense. Automation puts scale and leverage to labor-driven cost models. That's why we don't dig ditches by hand anymore.

- ITIL is not just about IT Service Management - it's about all Service Management – all kinds of services your business performs to compete

- It binds you to your customers/suppliers and erects barriers to exit

- Automation makes you think about what you're really doing. It forces you to make choices.

- Automation creates *speed*. Speed kills. It kills *you* when you have to make important decisions based on hunches. It kills your *competitors* when you do things better and faster for less. It kills *waste* when you eliminate unnecessary steps.

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Helps ITIL Service Design

- Previous data gives a baseline to derive reliable designs from

- Provides unmatched resource capacity management data

- Process management tools that implement ITIL processes can also be used to implement business processes

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Helps ITIL Service Transition

- Removes organizational ambiguity when you have a clearly defined process

- Makes each person's role in the process crystal clear

- Provides excellent training materials

- Flushes unresolved issues

- Provides the same change management/release management to process as to code

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Helps ITIL Service Operations *LEAN*VISTA

- Unused dusty manuals filled with process diagrams **don't** implement process

- Gives advance warning of issues before they become problems

- Provides better deliverable quality and uniformity of response.

- Gives clear credit for performance

- Enables SOX compliance monitoring/security management

- Automation ensures slack/gap time is eliminated

- Provides real-time performance data against service level requirements

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- Evidence-based decisions require good data.

- Automation provides unmatched visibility into operations *if* you're measuring the right things.

- If your not automated, however, you're probably already way too busy to collect data.

- Ergo, if you're not automated, you're probably not making evidence-based decisions.

- P.S. It's nice to be able to prove you're right, or figure out how to fix something that's wrong.

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Traits of Modern Process Automation Platforms

A partial list…..

1. Ability to define tasks and processes
2. Push and pull capabilities
3. Ability to remind people of deadlines - organizationally contextual dashboards/notifications
4. Ability to "head off" late tasks before they become late
5. Ability to integrate across the ecosystem through web services
6. Ability to derive resource capacity mgt view

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7. Cloud or server based

8. Ability to tie tasks/processes to people/org units/queues

9. Active notification system

10. Ability to put the right "skin" on the UI

11. Ability to integrate with other PM environments

12. Economical

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13. Not require computer programmers to make it work - can be managed by business SMEs

14. Can take the work products along for the ride

15. Unalterable detailed SOX-compliant audit trail

16. Scalable (technically and financially) from the smallest to the largest requirement

Tips for Process Automation Success

- Start small

- Pick the right pilot process

- Keep it simple but meaningful

- Form the right pilot team - users and IT

- Get comparative baseline and delta metrics

- Define terms of success clearly

- Don't oversell it

- Manage communications carefully

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