

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



- LeanVista is a business partner of Swift Software, manufacturer of JobTraQ Workflow and Task Automation software platform
- LeanVista manufactures the CareTran™ Care Coordination healthcare solution, based in part on the JobTraQ platform
- LeanVista is an ATA-in-training for the B-Wyze Group of companies
- All trademarks and copyrights are of their respective copyright owners

- 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

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

- 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.”

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 improved capability to compete

- 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

The ITIL Framework

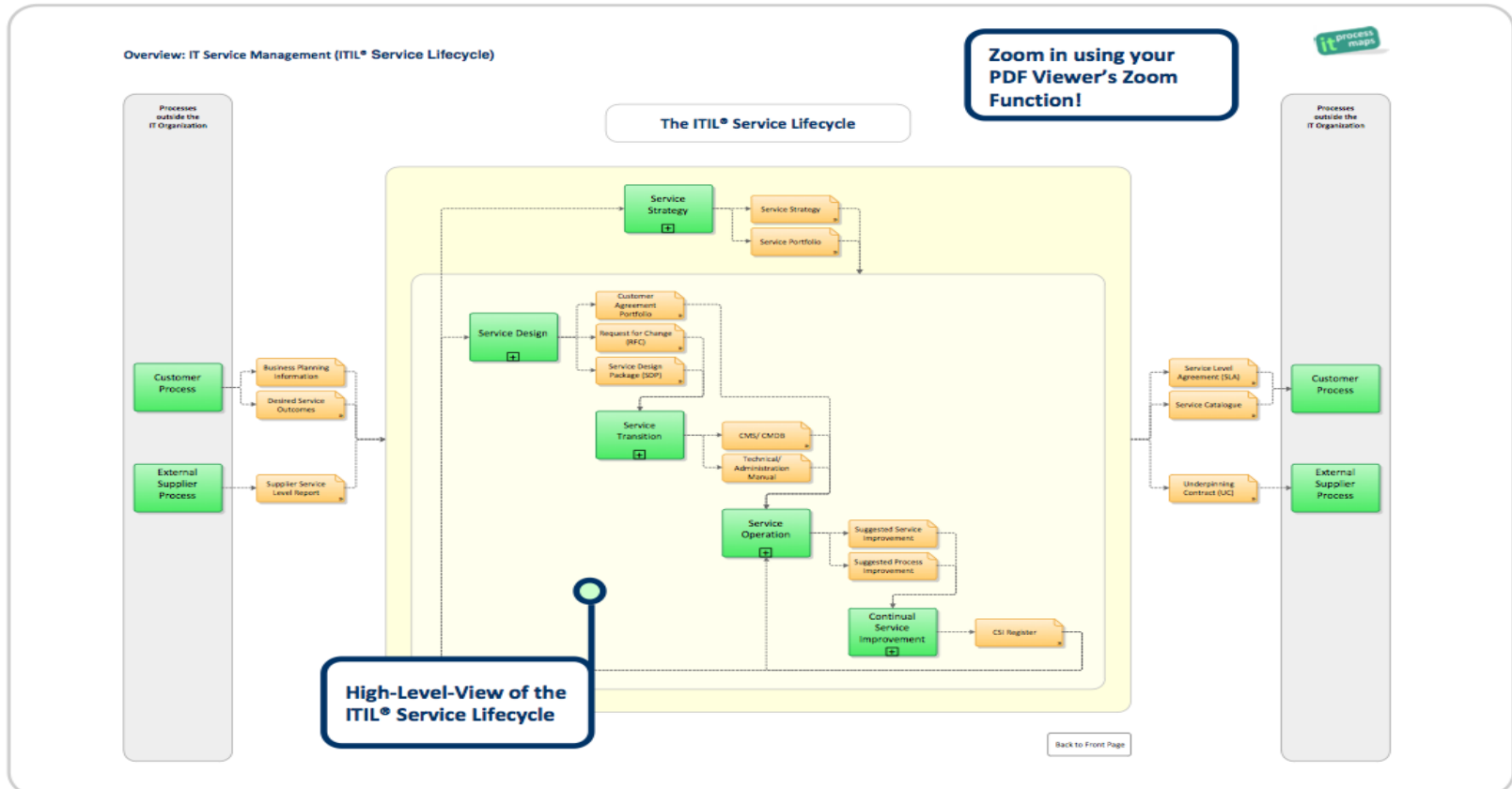
LEANVISTA



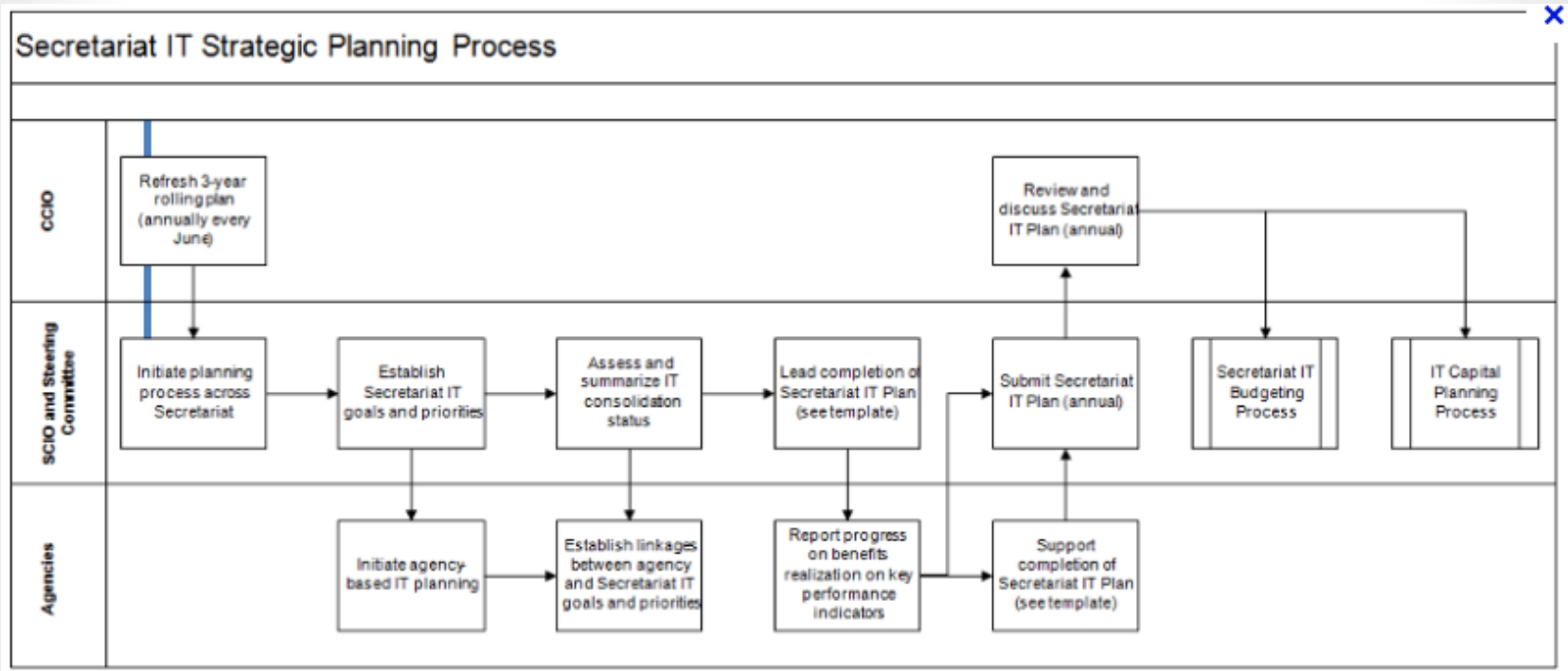
Source: www.itsmwatch.com

From Framework to Process

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



From Process to Swim Lane Diagram *LEANVISTA*



Source: State of Massachusetts

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

Create Your Process Tasks

LEANVISTA

The screenshot displays the JobTraQ software interface for creating a task. The top navigation bar includes 'Projects & Tasks', 'Calendar', 'Contacts', 'My Account', 'Recurring Tasks', 'Reporting', and 'Administration'. The main content area is titled 'Task Info' and shows details for 'Task Id: 990 - Please review the final contracts and setup a kickoff meeting'. The task is created by Bob Smith on 7/19/2012 at 3:13:44 PM, with a time log total of 0 seconds. The task type is 'Demo Task Type'. The form includes fields for 'Parent Project', 'Customer' (Widget Inc [Everyone]), 'Employee' (Bob Smith [Systems Administration] and Susan WorkerBee [Production]), and 'Other Notification Recipients' (Joe CEO [Senior Management]). The 'Brief Description' is 'Please review the final contracts and setup a kickoff meeting'. The 'Extended Description' contains a message from Bob to Sue: 'Legal has approved the language in the attached file, can you ans Sue please review it and make sure it still gets you what you wanted? If so, and if the vendor approves this, please schedule the meeting so we can get this project started. Thanks! Joe'. The task status is 'In-Progress', due date is 9/15/2012 at 11:59:59 PM, priority is 'Normal', and percent complete is 30%. The start date is 9/3/2012 at 10:00 AM and the end date is 9/3/2012 at 12:00 PM. Reminders are set for 30 minutes to the assignee. The interface also shows a sidebar with 'Create New', 'Alert Levels', 'Team Tasks', 'Unsaved Tasks', 'Unsaved Contacts', 'Unsaved Recurring Tasks', 'Unsaved Workflow Rules', 'Copied Records', and 'Running Timers'. At the bottom, there are buttons for 'Save And Only Notify Assignee' and 'Discard Changes', along with icons for calendar, email, print, and delete.

Define Workflow Rules

LEANVISTA

Workflow

Editing Rule #103

Rule Info

Rule Description: Reassign Defect Related Engineering Changes to Joan for QA

Process Category: Change Management Rule Is Enabled: Yes No

Criteria (Run this rule when one of these fields is changed and the task matches all of them)

Client[†]:

Assignee[†]:

[†]To make the Assignee or Client criteria match everyone in an organizational unit, select that organizational unit.

Task Type: Engineering Change Request Status: EC Completed - Pending Review

User-defined Filter: Change Category Contains Defect

Rule Priority: 5 Do not run this rule if the task is already assigned to the New Assignee
Higher numbers will cause this rule to override other rules.

Action (When this rule runs, change the task's fields to these new values)

Client:

Assignee: Joan Smith-Inspector [Quality Assurance] x

Task Type: Inspection Task Status: QA10 - Awaiting QC

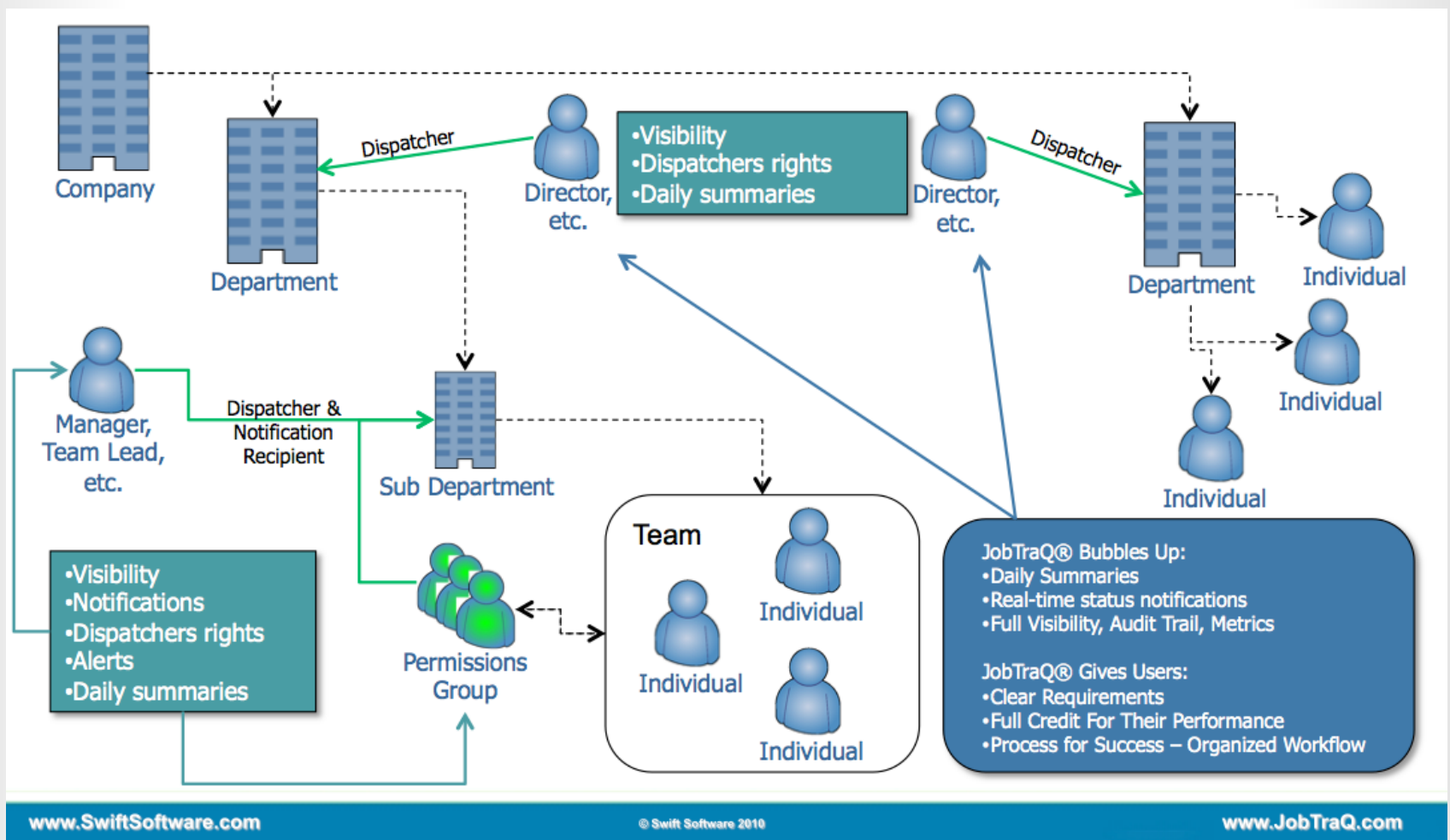
User-defined Values:

Generate New Tasks (When this rule runs, create these projects and tasks)

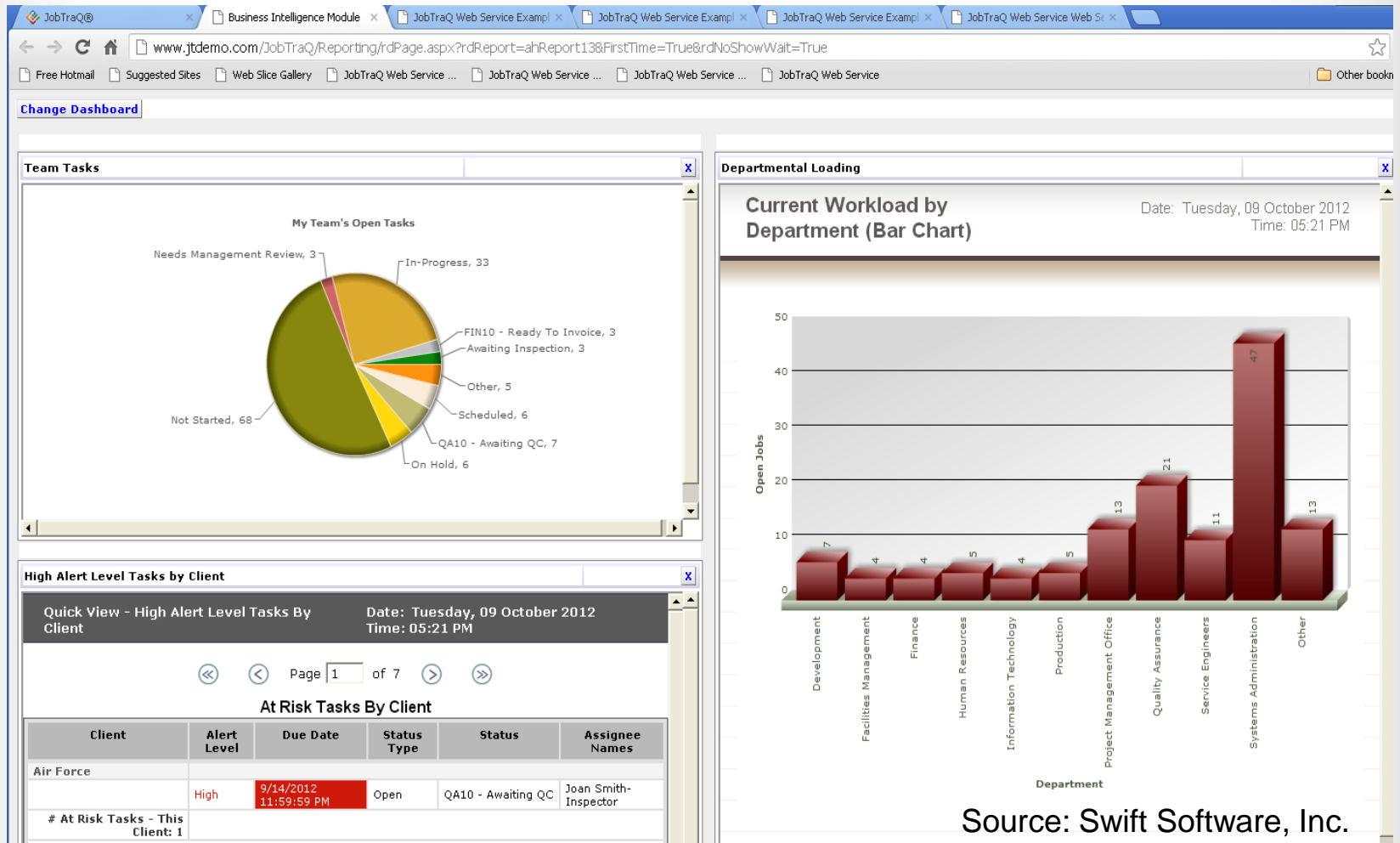
Add Task Add Project

Source: Swift Software, Inc.

Organizational Visibility Model *LEANVISTA*



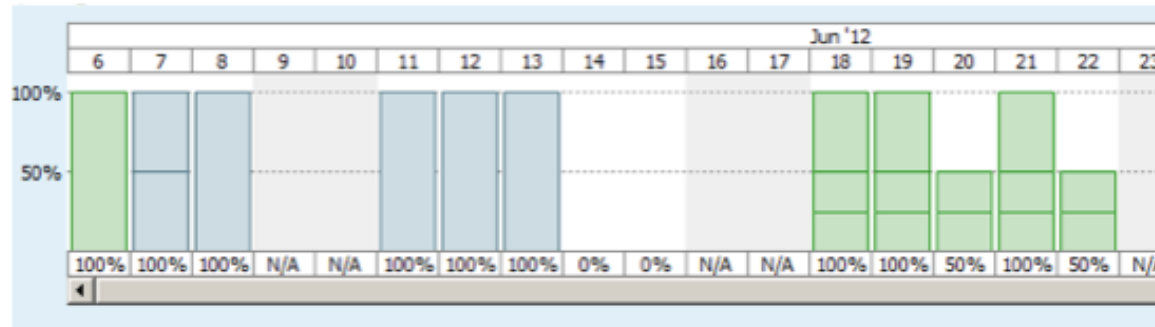
Macro Organizational Visibility **LEANVISTA**



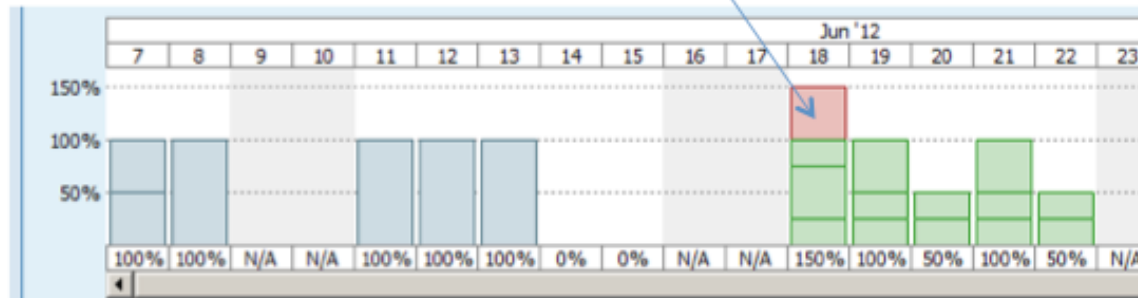
Source: Swift Software, Inc.

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.

Task Visibility

The screenshot displays the JobTraQ software interface. At the top, there are navigation tabs: Projects & Tasks, Calendar, Contacts, My Account, Recurring Tasks, Reporting, and Administration. The main content area shows a task detail view for 'Task Id: 990 - Please review the final contracts and setup a kickoff meeting'. The task is created by Bob Smith on 7/19/2012 at 3:13:44 PM, with a time log total of 0 seconds. The task type is 'Demo Task Type'. The parent project is empty. The customer is 'Widget Inc [Everyone]'. The employee is 'Bob Smith [Systems Administration] * Susan WorkerBee [Production] *'. Other notification recipients include 'Joe CEO [Senior Management] *'. The brief description is 'Please review the final contracts and setup a kickoff meeting'. The extended description contains a message from Bob to Sue: 'Legal has approved the language in the attached file, can you ans Sue please review it and make sure it still gets you what you wanted? If so, and if the vendor approves this, please schedule the meeting so we can get this project started. Thanks! Joe'. The status is 'In-Progress'. The due date is 9/15/2012 at 11:59:59 PM. The priority is 'Normal' and the percent complete is 30%. The start date is 9/3/2012 at 10:00 AM and the end date is 9/3/2012 at 12:00 PM. Reminders are set for 30 minutes to the assignee. Dependencies are listed as 0 predecessor(s) and 0 successor(s). The interface also includes a left sidebar with sections like 'Create New', 'Alert Levels', 'Team Tasks', 'Unsaved Tasks', 'Unsaved Contacts', 'Unsaved Recurring Tasks', 'Unsaved Workflow Rules', 'Copied Records', and 'Running Timers'. At the bottom, there are buttons for 'Save And Only Notify Assignee' and 'Discard Changes', and a source attribution to 'Source: Swift Software, Inc.'.

Source: Swift Software, Inc.

Security

LEANVISTA

Contact List Contact Info Contact Import

Contact Id: 323

Dispatcher For
Select the individuals, organizational units, and assets whose tasks should be able to be managed by the current contact.

Receives Notification From
Select the individuals, organizational units, and assets whose tasks should send email notifications to the current contact.

Permission Group Members

Can Add Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Edit Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Delete Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Notify Assignee When Saving Tasks And Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Notify Owner When Saving Tasks And Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Notify Everyone When Saving Tasks And Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Save Tasks And Projects Without Sending Notifications	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Add Recurring Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Edit Recurring Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Delete Recurring Tasks and Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Add Appointments	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Edit Appointments	<input type="radio"/> Yes <input checked="" type="radio"/> No

Source: Swift Software, Inc.

SOX Audit Trail

Revision	Changed By	Change Date/Time	Change Summary
1	Bob Smith	8/16/2012 12:58:28 PM	<ul style="list-style-type: none"> Task Created Building Number changed to "3800" Billable changed to "Undetermined" Created By changed to "Bob Smith" Electrical Design Submitted changed to "no" Project/Task Type changed to "Demo Task Type" Miss Utility Called? changed to "No" Post Date changed to "7/19/2012 3:13:44 PM" Priority changed to "Normal"
2	Bob Smith	8/16/2012 12:58:28 PM	<ul style="list-style-type: none"> [following added by Bob Smith on 11/6/2008 2:58:06 PM] Please be careful with this implementation, the user group is very sensitive to downtime. Percent Complete changed to "30%" Miss Utility Number changed to "10274568" Miss Utility Called? changed to "Yes" Customer changed to "Widget Inc" Start Date changed to "8/6/2012 3:00:00 PM" Show On Calendar changed to "Yes" Lot Number changed to "628799a" Materials Estimate changed to "1240723.78" Extended Description changed to "Bob, Legal has approved the language in the attached file, can you ans Sue please review it and make sure it still c" Electrical Wire Gauge Required changed to "16" Electrical Permit Number changed to "34126799879" End Date changed to "8/6/2012 5:00:00 PM" Due Date changed to "8/18/2012 12:00:00 AM" Brief Description changed to "Please review the final contracts and setup a kickoff meeting" Alert Level changed to "Medium" Parent Project changed to "" Contact(s) added to Employee: Bob Smith; Susan WorkerBee Contact(s) added to Other Notification Recipients: Joe CEO
3	Alert Level Processor	8/16/2012 12:58:28 PM	<ul style="list-style-type: none"> Alert Level changed to "High"
4	Bob Smith	8/16/2012 12:58:28 PM	<ul style="list-style-type: none"> Start Date changed to "8/6/2012 3:00:00 PM" End Date changed to "8/6/2012 5:00:00 PM" Alert Level changed to "High"
5	Bob Smith	8/16/2012 12:58:28 PM	<ul style="list-style-type: none"> End Date changed to "8/6/2012 5:00:00 PM" Start Date changed to "8/6/2012 3:00:00 PM"

Source: Swift Software, Inc.

- 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.

- 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

Helps ITIL Service Transition

LEANVISTA

- 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

Helps ITIL Service Operations *LEANVISTA*

- 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



Helps ITIL Continual Service Improvement **LEANVISTA**

- 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.

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

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

And still more traits - 3

LEANVISTA

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 *LEANVISTA*

- 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

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 through:
 1. Increased Organizational Visibility
 2. Real-Time Speed
 3. Defined Quality
 4. Accountability / Regulatory Compliance
 5. Improved Financial Performance
- Resulting in an improved capability to compete



Thank You For Attending The Webcast!

Please take a moment to answer the quick survey after you exit the webcast. Your feedback is extremely valuable to us.

We'd Love To Hear From You!

Phone: 1.877.581.3942

Email: Info@ThoughtRock.com

