Aug 17, 2010
12pm EST

THE
BREAKTHROUGH
SERIES
from
Thought Rock

About THE **BREAKTHROUGH** SERIES from Thought Rock

The Breakthrough Series is a thought-provoking series aimed at answering two commonly heard laments:

- "I've taken ITIL classes and read the books, but I still don't know how to do it"!
- "The consultants have left, and we don't know how to carry on"!

Graham Furnis
ITSM Consulting

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Process Design: Service Level Management

BreakThrough Series

Helping you to achieve breakthroughs in your organization!

- Templates
- Live Webinars
- Roundtables
- Workshops

So what's the Challenge?

"I see the ITIL generic process model, but how do I make this fit our organization?!"

"I've taken ITIL classes and read the books, but I still don't know how to build my own process"?!

"How do I continue to evolve my processes"?!

Agenda

- What are we managing in SLM and How?

- SLM Goal and Process Documentation

- Key Components of the Process Model

- Our Approach

- Simple walk-through example

- Wrap up

Service Level Management: So what are we Managing?

- Managing "Service Levels"

- Through Service Agreements including:

  – Top level Service Level Agreement (SLA)

  – Supporting level Operational Level Agreements (OLAs)

Service Level Management:
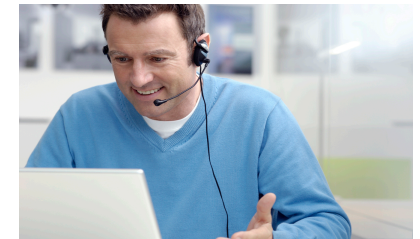# More about Agreements (SLAs, OLAs)

- Service Levels are the agreed delivery requirements and commitments for IT Services (***service targets***)

    ### Service Level Agreements (SLA)

    – Delivery requirements are customer-facing aspects of IT Services

    ### Operational Level Agreements (OLA)

    – IT commitments are IT-facing arrangements for managing the underlying hardware and software that forms each IT Service
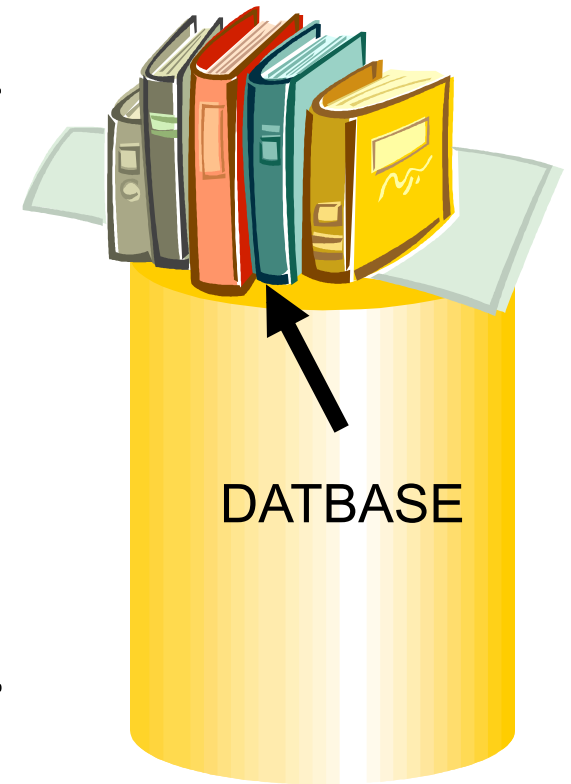
Service Level Management: Separating "Published" from "Source"

- The Agreement is quite often thought of as a Document…

- Not exactly…

- The Document is a **_published_** version of the Agreement

- It is produced from the original source … suggested to be a Forms Processing Database or some other Database tool

DATBASE

Service Level Management Goal
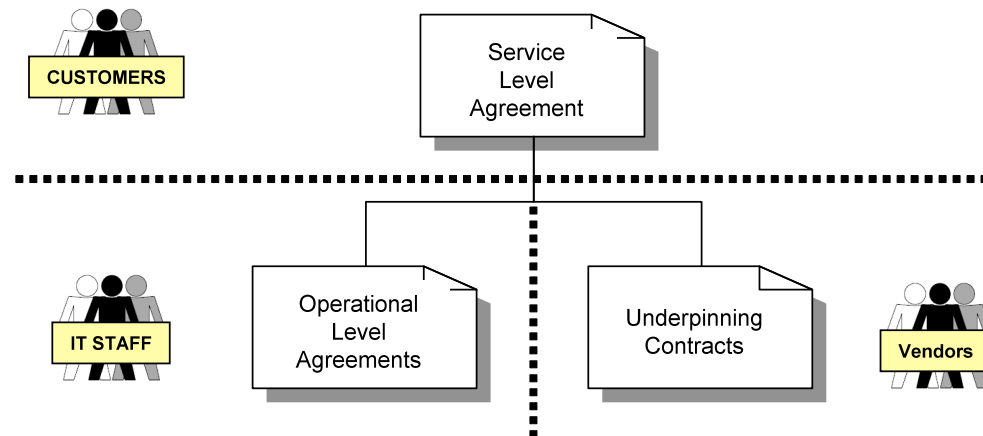
- The goal of the Service Level Management process is to ensure that an agreed and achievable Level of IT Service is provided for all IT Services,

- and that these **_Service Levels_** are reviewed and managed to meet or exceed targets

Process Documentation: From What Perspective?

- This presentation and associated ThoughtRock Template focuses at the **_Activity Level_**
  - These are activities that "manage" the "Service Levels"
  - This is done at a generic process model level
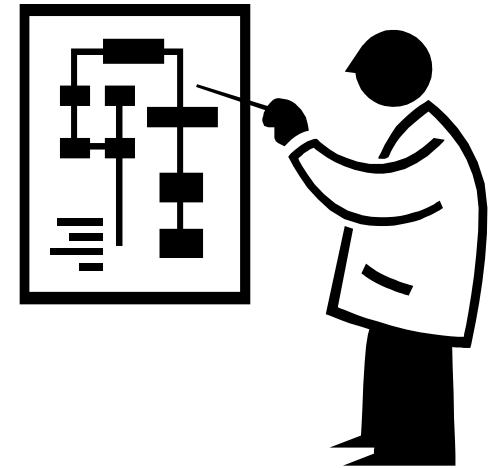
Process Documentation:
Two Key Elements

The Activity Flowchart

- This is "the process at a glance"
  - A picture says 1,000 words
- It provides the big picture of how you are managing the main process elements
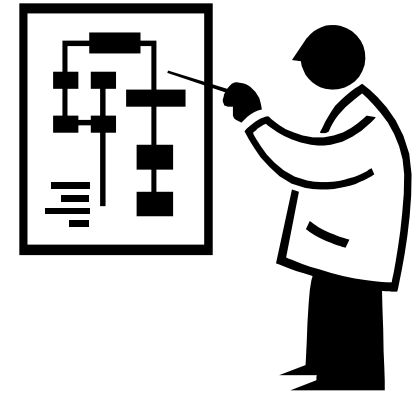
The RACI Chart

- This is "the matrix of who's doing what and who's making sure it gets done"
- Accountable, Responsible's, Consulted's, Informed's

Process Documentation:
The Business Rules

Business Rules

- Process documentation is a reference document for business rules governing activities that coordinate the people and activity steps that make up SLM
  - It is usually written at a high generic level and then customized for specific situations

Technology is Needed

- The **Service Management System (SMS)** is commonly known as the "ticketing system"
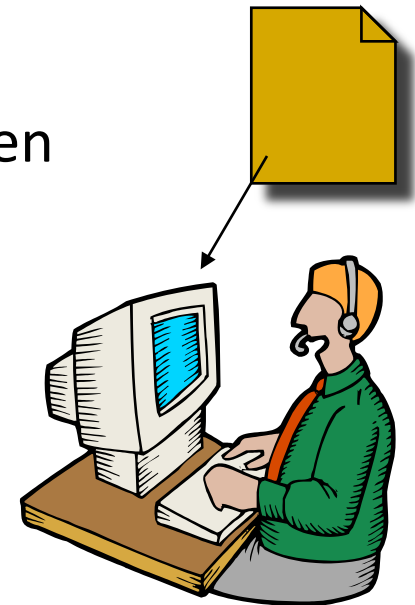
Our Approach

- Start with a process template

- Publish to all stakeholders for input and insight

- Implement the process using common tools such as the Service Management System (SMS)

- Populate the SMS with the process ticket type and process business rules
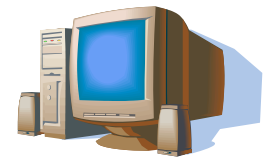
A Walk-Through Example:
Activity Flowchart Combined
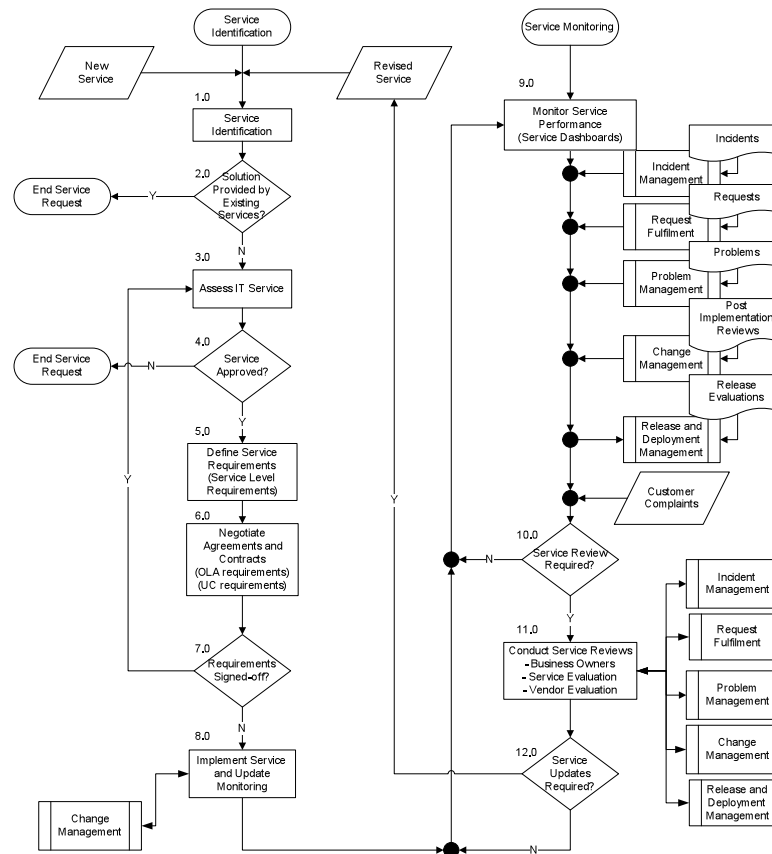
A Walk-Through Example:
Activity Flowchart for New / Revised Services
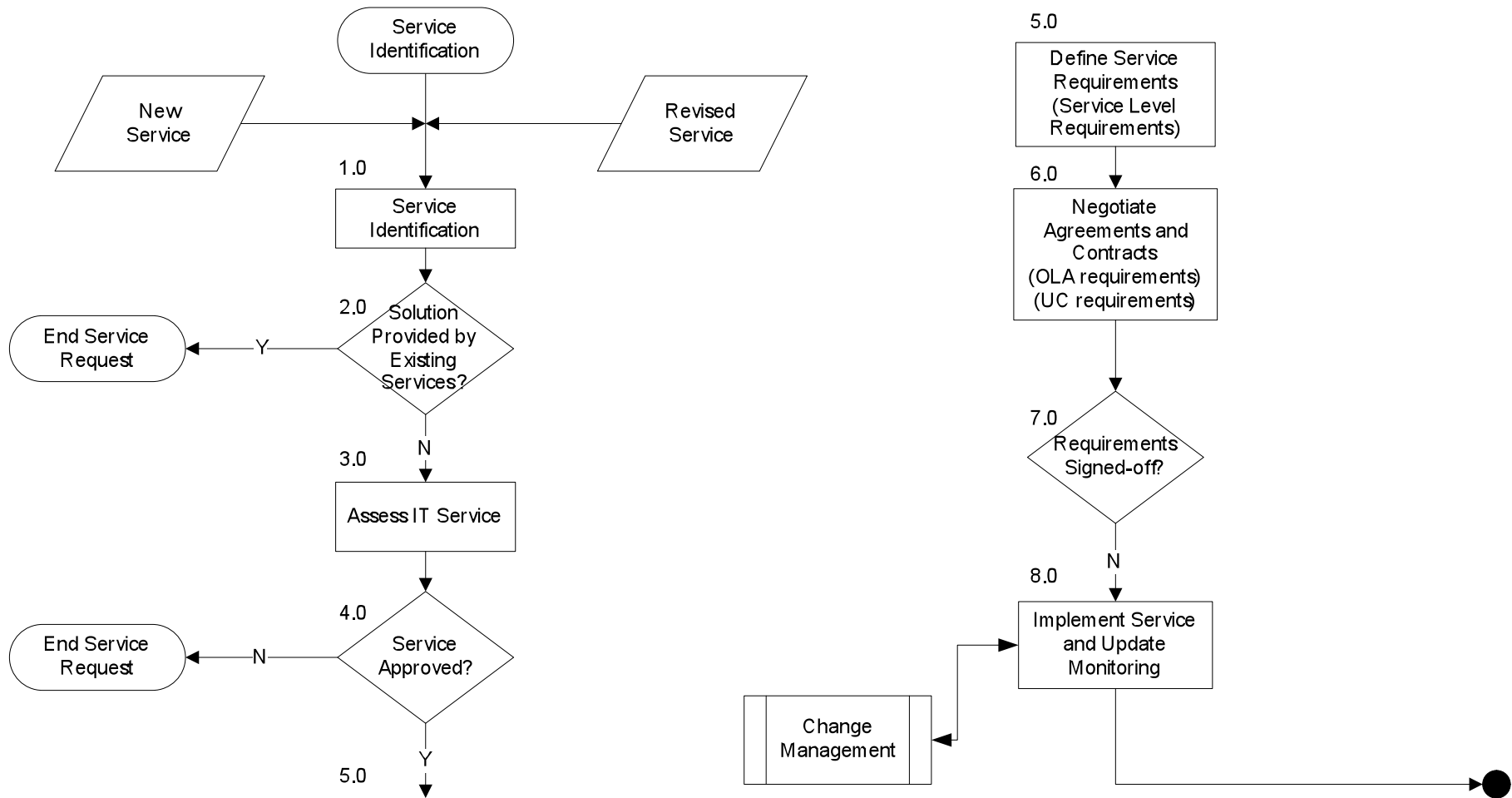
Service
Identification

New
Service

Revised
Service

5.0
Define Service
Requirements
(Service Level
Requirements)

1.0
Service
Identification

6.0
Negotiate
Agreements and
Contracts
(OLA requirements)
(UC requirements)

2.0 Solution
Provided by
Existing
Services?

End Service
Request

Y

7.0
Requirements
Signed-off?

N

N

3.0
Assess IT Service

8.0
Implement Service
and Update
Monitoring

4.0
Service
Approved?

End Service
Request

N

Change
Management

Y

5.0

A Walk-Through Example:
Activity Flowchart for Ongoing Management
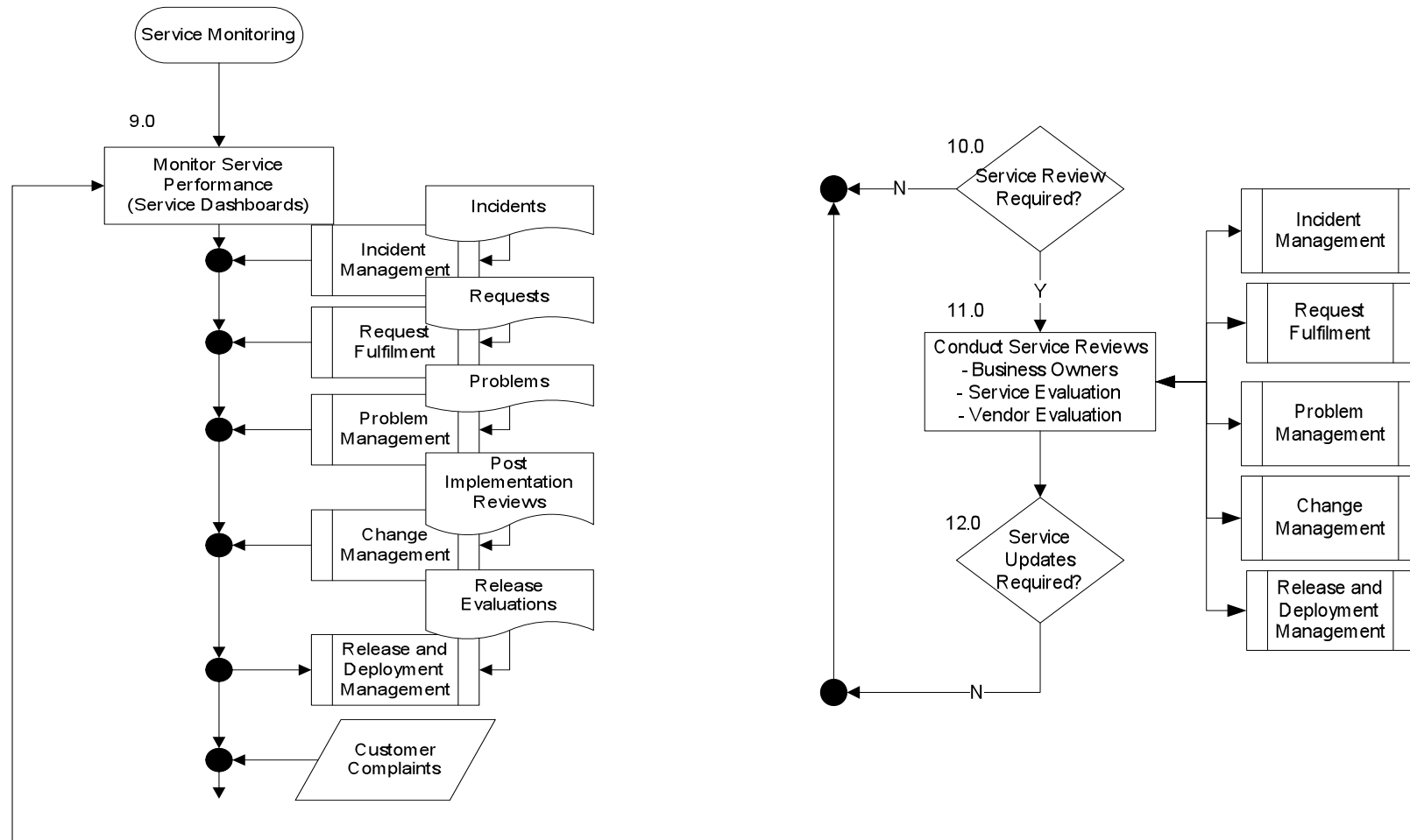
A Walk-Through Example:
Define your Activity Roles

- Customer
- Supplier
- Service Level Manager
- Service Catalog Manager
- Customer Relationship Manager
- Supplier Relationship Manager

- Service Analyst
- Supplier Analyst

- The Service Desk
- Incident Management
- Request Fulfilment
- Problem Management
- Change Management
- Release and Deployment Management

A Walk-Through Example:
Roles and Activities defined in the RACI Chart

Roles / Activities	Customer	Supplier	Service Desk	Service Level Manager/Owner	Service Catalog Manager	Customer Relationship Manager	Supplier Relationship Manager	Service Analyst	Supplier Analyst	Incident Management	Problem Management	Change Management
Service Identification												
1.0 Service Identification	R,C			R,I		A,R,I						
2.0 *Solution Provided by Existing Services?*	I	C		A,R,I	R	A	R					
3.0 Assess IT Service		C		A,R		R,I	R,I					
4.0 *Service Approved?*	I	I		A,R		R,I	R,I					
5.0 Define Service Requirements	C	C	C	A		R,C	R,C	R	R	C	C	C
6.0 Negotiate Agreements and Contracts	C	C	C	A,R,I		R,I	R,I	R	R	C	C	C
7.0 *Requirements Signed-Off?*	I	I	I	A,R,I		R,I	R,I	R	R	I	I	I
8.0 Implement Service and Update Monitoring	C,I	C,I	C,I	A,I	R	R	R	R	R	C,I	C,I	C,I

A Walk-Through Example:
Roles and Activities defined in the RACI Chart

		Customer	Supplier	Service Desk	Service Level Manager/Owner	Service Catalog Manager	Customer Relationship Manager	Supplier Relationship Manager	Service Analyst	Supplier Analyst	Incident Management	Problem Management	Change Management
	Roles / **Activities**												
	Service Monitoring												
9.0	Monitor Service Performance	C		R,C	A,I		R		R,I		C	C	C
10.0	*Service Review Required?*	C,I	C,I	C,I	A,R		C,I		C,I		C,I	C,I	C,I
11.0	Conduct Service Reviews	C	C	C	A,R,I		R,I	R,I	R	R	C	C	C
12.0	*Service Updates Required?*	I	I	I	A,R		I	I			I	I	I

A Walk-Through Example:
Describe the Details for Each Activity

Process Steps Described – Service Identification

1.0 Service Identification

Objective	To identify new IT Services OR revisions to existing IT Services that provide value and cost effective business solutions to the customer.
Policy	All requests for revisions to IT Services or for new IT Services will be assessed and prioritized from a business objectives and business value perspective.
Input(s)	A request for new IT Service A request for revisions to existing IT Service
Output(s)	Initiation of Service Identification High Level Business Requirements Decision to Proceed
Status	- none -
Description	• (A,R,I) The Customer Relationship Manager is *Accountable*, *Responsible* and *Informed* as the point of contact for all customer communications to the IT Organization. • (R,I) The Service Level Manager/Owner is *Informed* of requests from Customers and is *Responsible* to plan, manage, and approve the overall portfolio of IT Services delivered by the IT Organization. • (R,C) The Customer is *Responsible* and *Consulted* to communicate with the Customer Relationship Manager when requesting revisions to IT Services or requesting new IT Services.

Summary

- Adopt the Service Agreement template approach to create consistent flow-through agreements

- Document the process at the high level, including:
  - Activity Flow Diagram   - Activity Descriptions
  - Defined Activity Roles   - RACI chart

- Publish the process and walk through with stakeholders

- Implement the process using your common ticketing tool

Thank You!

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