

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?

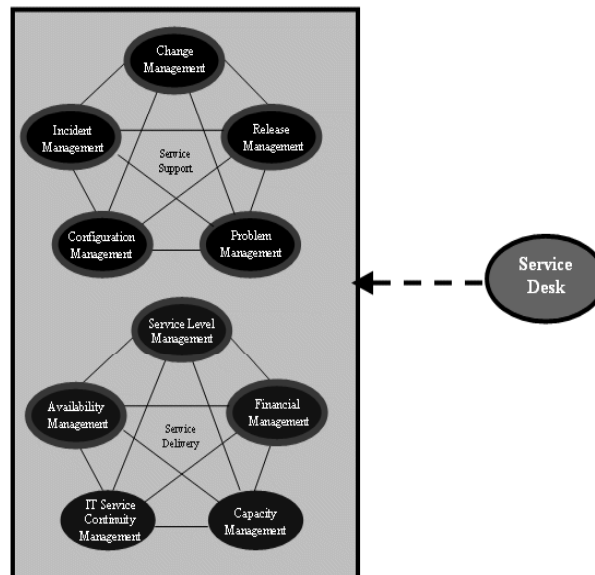
- Value Proposition
 - Strategy
 - Service management practices
 - Continual improvement
- Trusted partnership!

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!

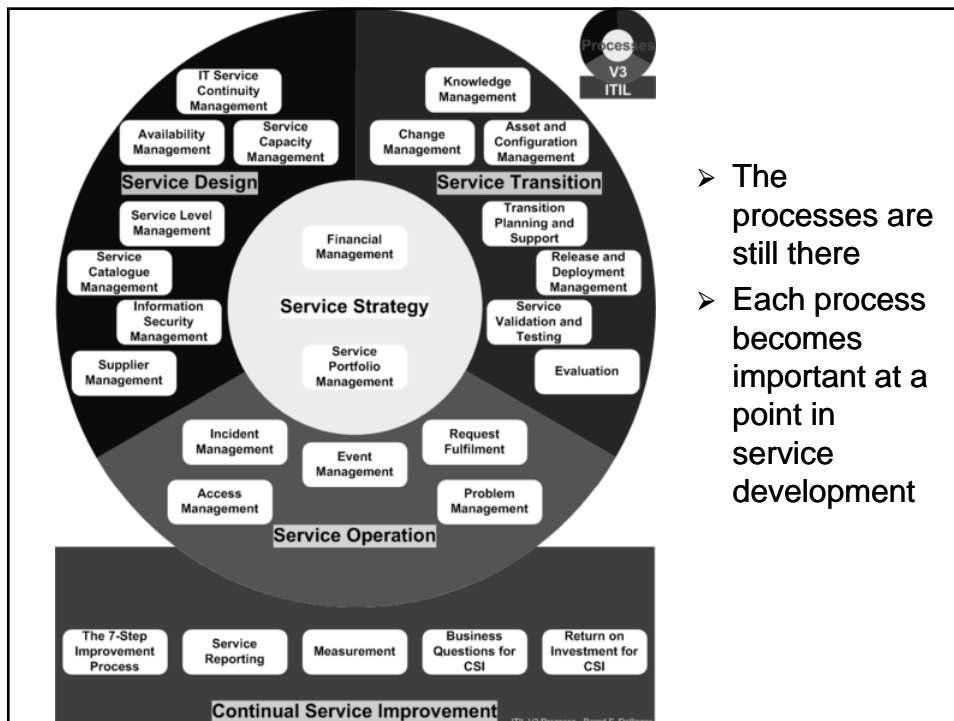


ITIL Version 3



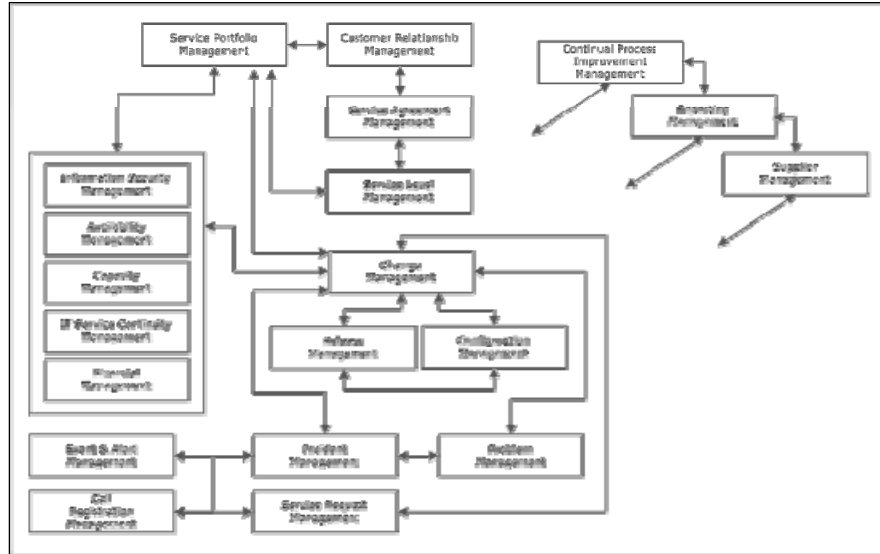
➤ Lifecycle of a Service

- Strategy
- Design
- Transition
- Operation
- Continual Improvement

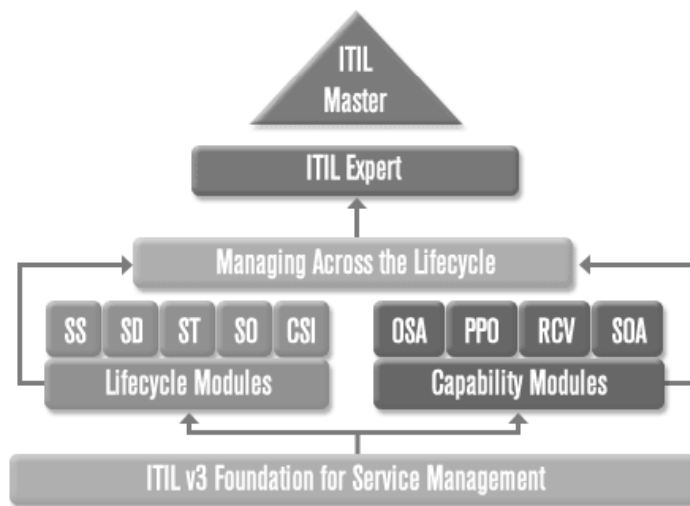


- The processes are still there
- Each process becomes important at a point in service development

Process Dependencies



ITIL Training and Certification



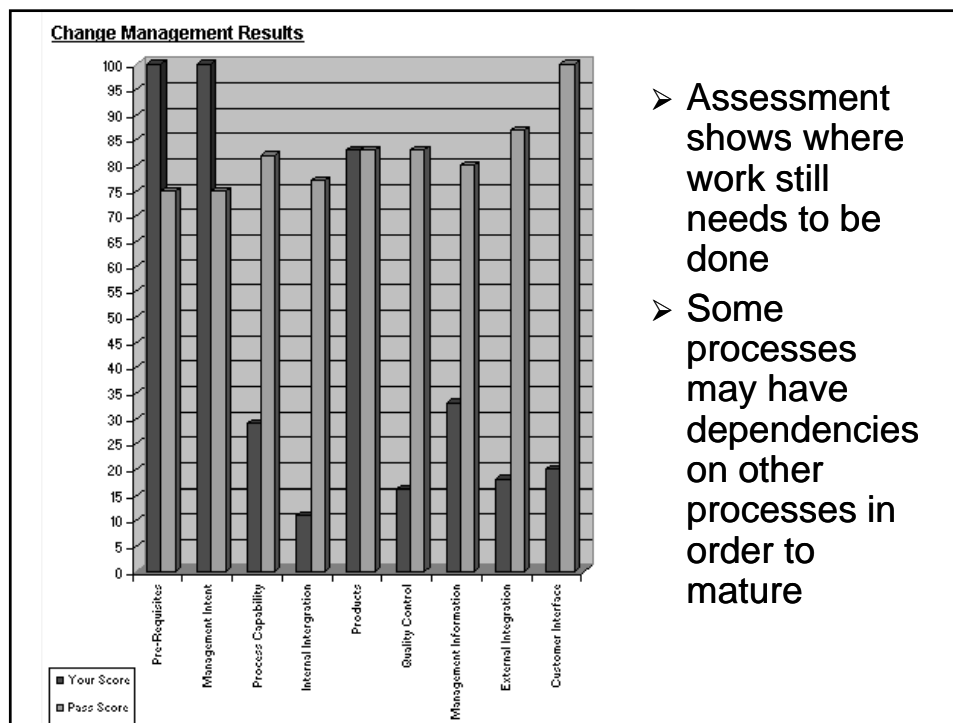
If you don't know where you are going,
how will you know when you arrive?

➤ **Maturity Assessment**

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

➤ **Roadmap**

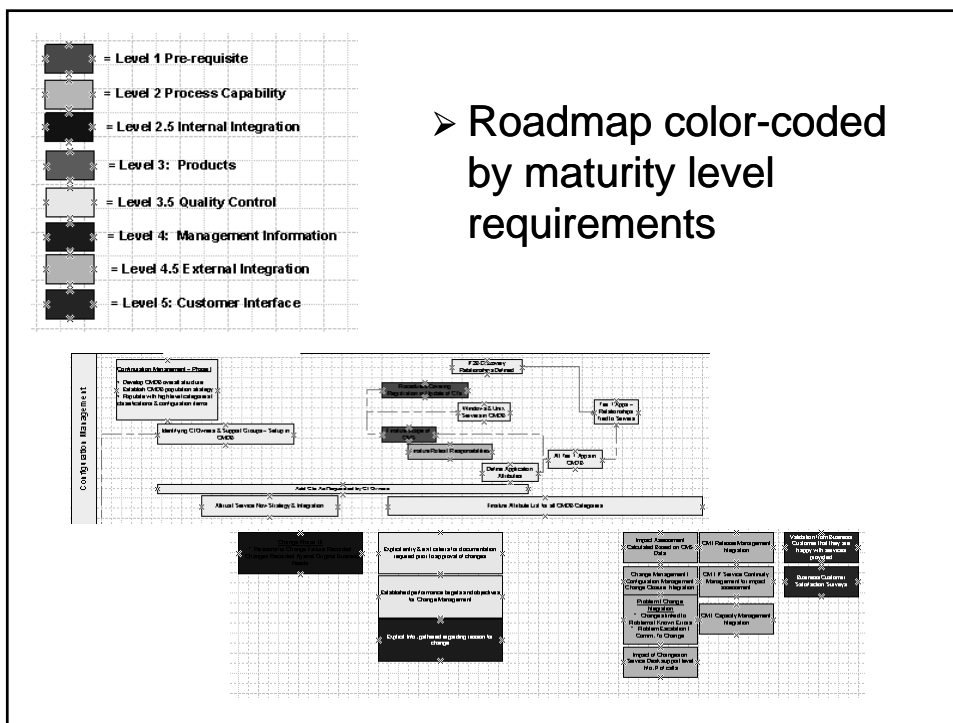
- Process plans on a timeline
- Dependencies on other processes identified
- Maturity levels identified

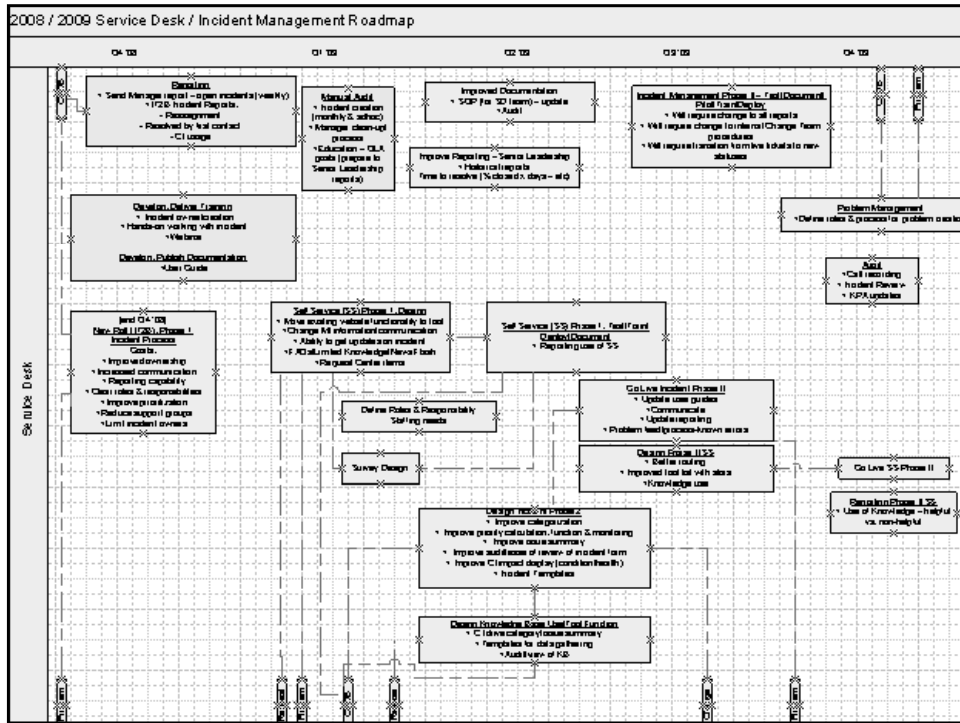


- Assessment shows where work still needs to be done
- Some processes may have dependencies on other processes in order to mature

ITIL Service Support Self Assessment: Change Management		
Level 1: Pre-requisites		
1.	Are at least some change management activities established in the organization, e.g. logging of change requests, change assessments, change planning, change implementation reviews?	Yes
2.	Are change management activities assigned to specific individuals or functional areas?	Yes
3.	Is there a procedure for raising and issuing requests for change?	Yes
Level 1.5: Management Intent		
4.	Has the purpose and benefits of change management been disseminated within the organization?	Yes
5.	Has the scope of change management activity been established within the organization?	Yes
6.	Does the organization have standards or other quality criteria for the raising and registering of changes?	Yes
Level 2: Process Capability		
7.	Have responsibilities for various change management activities been assigned?	Yes
8.	Are the procedures for initiating change always adhered to?	No
9.	Is there a procedure for approving, verifying and scheduling changes?	No
10.	Are the business and technical impacts of changes always assessed?	No
11.	Is change progress monitored adequately by Change Management?	Yes
12.	Is the successful implementation of a change confirmed by Change Management?	No
13.	Is there a procedure for the review of all changes?	No
14.	Are adequate change management reports produced?	No

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





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 Statements.....

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

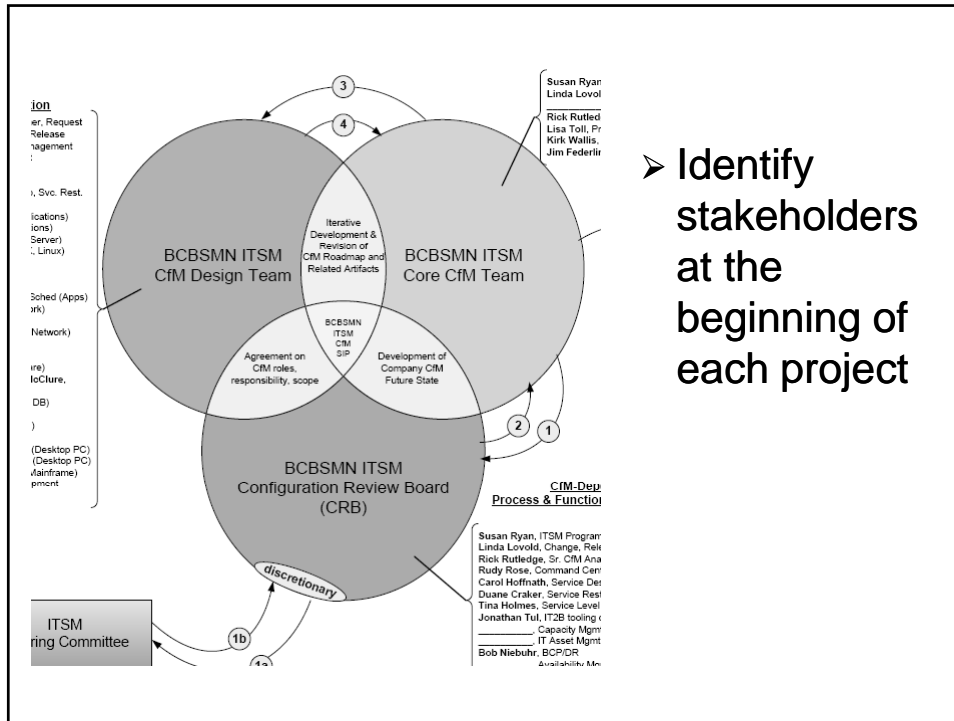
14 Relationship with CMMI/SDLC and SCM.....

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**



➤ Identify stakeholders at the beginning of each project

Design Team

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

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...

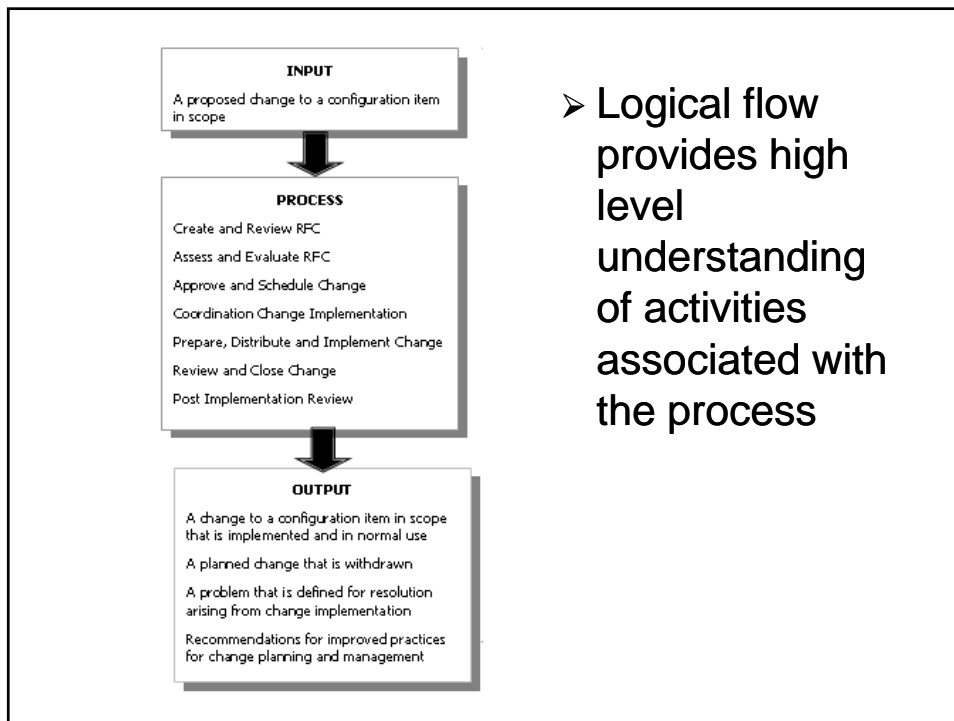
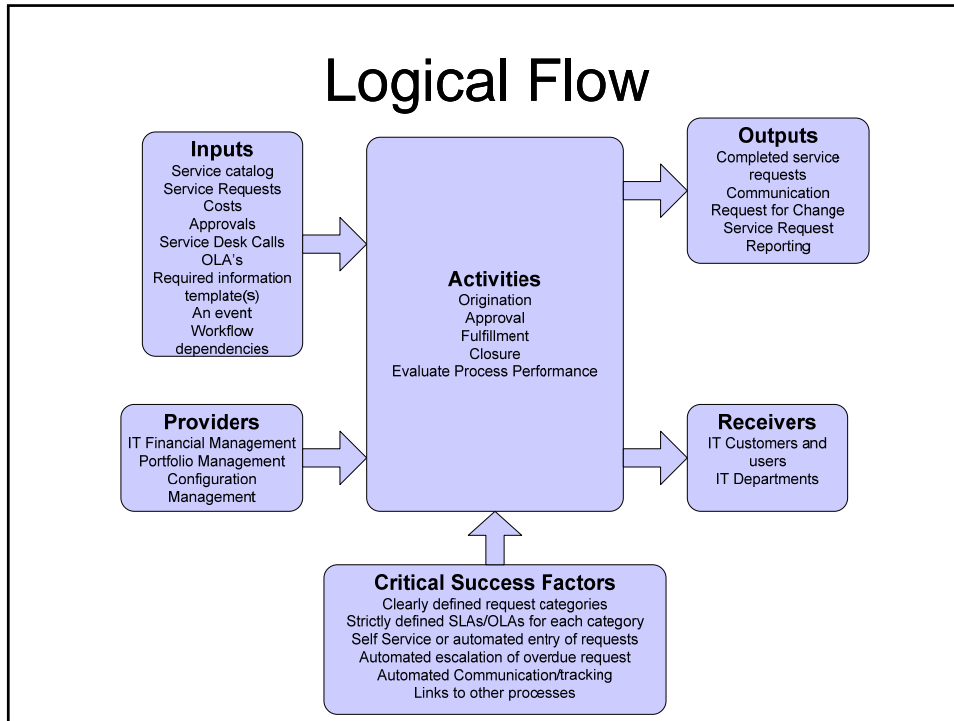
- Improves quality of project deliverables
- Wireframe best practices to reduce time
- Always a solution in back pocket
- Intense focus – no distractions of every day work

Project Deliverables

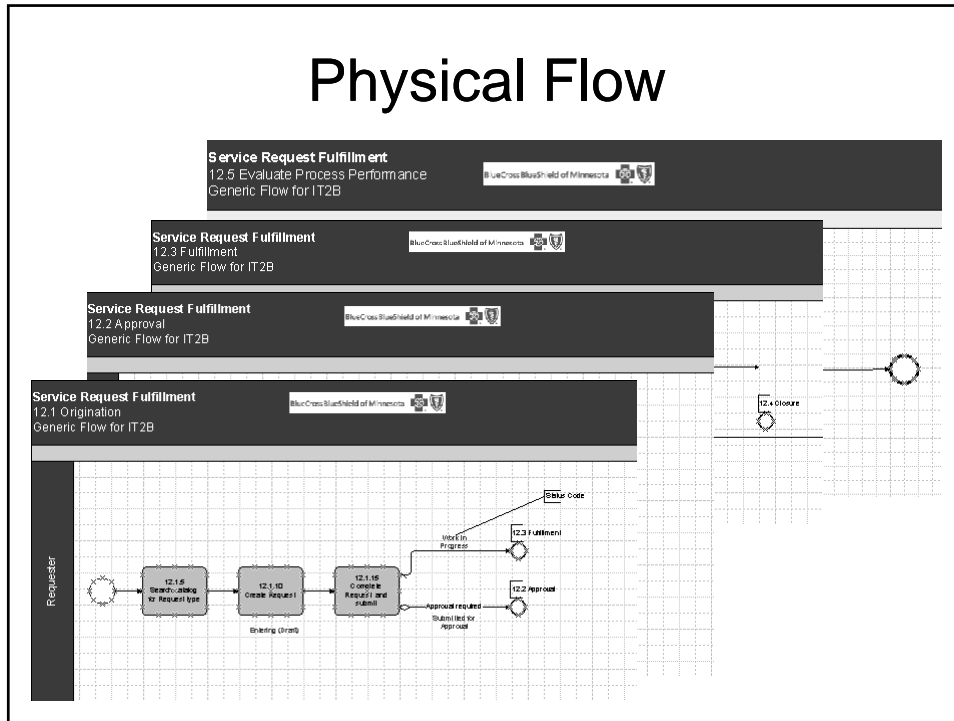
- Roles and Responsibilities
- Logical Flow
- Physical Flow
- ARCI and Work Instructions
- Functional Requirements
- Test Cases
- KPIs/Metrics and Reports
- Audit Involvement

Roles and Responsibilities

Requestor	Wants the work to be done to satisfy a business need
Initiator	Creator of the RFC
Change Owner	Owns the RFC through the lifecycle of the change and is ultimately responsible for its success
Resource Manager	Accepts and assigns tasks for their team
Implementer	Completes tasks assigned to them
Approver	Responsible to protect system availability for the business
Change Coordinator	Reviews RFCs for completeness and policy compliance



Physical Flow



ARCI

Accountability	Ownership of quality and end result of process
Responsibility	Correct execution of process and activities
Consulted	Involvement through input of knowledge and information
Informed	Receiving information about process execution and quality

Work Instructions

12.3.20 Escalate

Role	A	R	C	I
Service Provider			X	
Requester				X
Service Level Management			X	
Service Request System		X		
Service Provider Functional Manager	X	X	X	

- 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/action
- Service Provider fulfillment continues during and/or after escalation
- Communication goes to Requester

Functional Requirements

Requirement Description	Related Work Instruction/ Policy/Metri	Contact/ Owner	Priority	Status	Coding/Dev Hours
Urgency defaults based on Impact (Values = Low, Medium, High)	14.2.20	Req Session	01 - High	Developed	0.75
ROLE: Based on role, some roles should be able to change Priority	14.2.20	Req Session	02 - Medium	Developed	0.75
Priority should be calculated based on Impact and Urgency (See Impact/Urgency matrix in PG 14 Specifications document)	14.2.20	Req Session	01 - High	Developed	1.50
Impact is calculated based on the following fields: Environment, Type, Criticality of Service and Organizational Impact (See Impact/Urgency matrix)	14.2.20	Req Session	01 - High	Developed	1.50
Ability to relate incidents through the CI map to Parent Incidents	14.2.25	Req Session	03 - Low	Submitted	
When Priority = 1, send notification to Incident Manager	14.2.20	Req Session	01 - High	Developed	0.50
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	14.1.10	Req Session	02 - Medium	On Hold	1.00
Add Resolution field that is required when Status = Resolved or Closed (this should be after Work Notes)	14.5.45	Req Session	02 - Medium	On Hold	1.00
Need an easy way to differentiate between Work Notes and Customer Notes and easy	14.2.30	Req Session	02 - Medium	Developed	2.00

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. 20	Case Revision No.: 1 Date Last Modified: 6/27/08	
Cond #	Test Condition	Input Data	Expected Results	Pass / Fail
20	14.3.10 Incident Analyst	Change Assigned To to your name. Change Status to Accepted in the drop down menu. Click on Update button.	Status changes to Accepted and your name appears in Assigned To Page listing all incidents returns	
21	14.3.10 Incident Analyst	Re-open that incident by clicking on Incident #XXXXX	The incident form appears with the incident you created. The Assigned to field contains your name.	
22	14.3.15	Change Status to Work In Progress	Status changes to Work In Progress	
23	14.3.20 Incident Analyst	Type "Worked on this ticket" in the Work Notes field. Right click on blue bar at the top of the incident form and select Save	Work Notes move to Summary area and ticket page stays open. Work Notes field is cleared.	

Measuring Process Effectiveness

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

KPI	Metrics
Timely flow through the Change process	Average time RFCs are in each status by Priority and Type.
% of changes causing incidents	# of changes that create high-impact incidents

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

KPI	Metrics
Effective communication to all users regarding the change	The Forward Schedule of Changes (FSC) reflects real time status of changes Stakeholder notification is effectively utilized when appropriate.
Changes entered earlier	# of changes by Urgency timeframe by group

- 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

Distributed Server Class

Category prefix:	HW
Class prefix:	DIS
Search Code:	HW-DIS
Description:	
Discovered?	Yes
Reconciled?	TBD
Reconcile Description:	

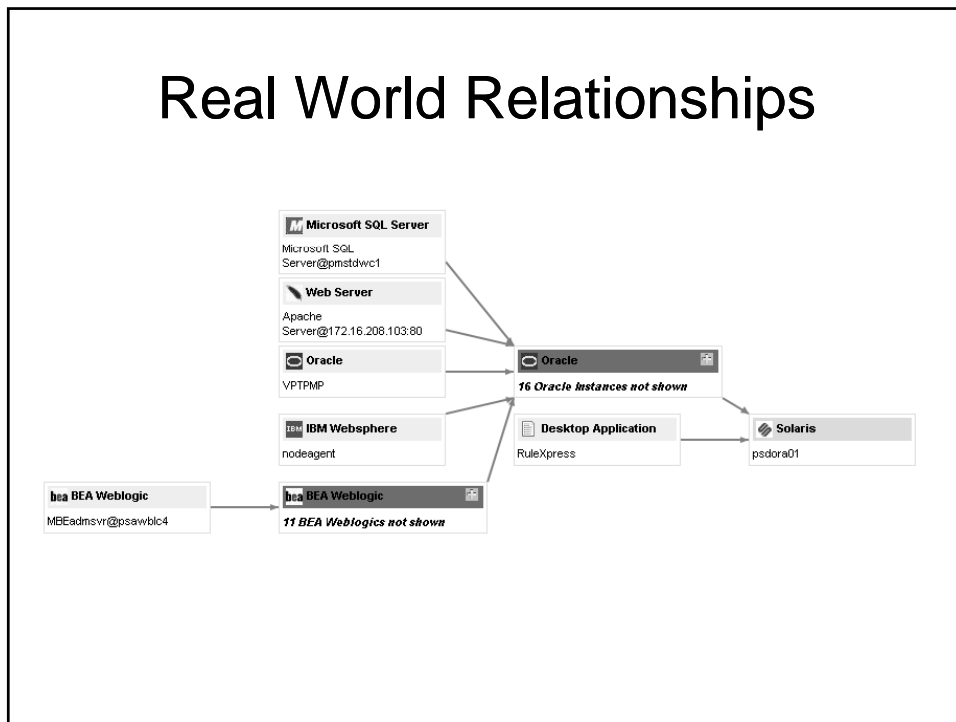
Specific Attributes	Business Description	Reconciled?	Required	Type/Length	Allowed Values	Unique ID	Source	Discovered?	Change control?	Population method	CI Owner/Analyst	CI Admin.
Vendor		N	N	varchar2(80)	?	N	TBD	N	N	?	Read only	Create/modify
Manufacturer		N	N	varchar2(80)	?	N	TBD	Y	N	?	Read only	Create/modify
Make		N	N	varchar2(80)	?	N	TBD	Y	N	?	Read only	Create/modify
Model		N	N	varchar2(40)	?	N	TBD	Y	N	?	Read only	Create/modify
Serial #.	The serial number assigned to the asset by the manufacturer	N	Y	varchar2(100)	?	Y	TBD	Y	N	?	Read only	Create/modify
Asset tag	Physical label attached by BCBS	N	Y	varchar2(40)	?	Y	TBD	N	N	?	Read only	Create/modify
Processor type		N	N	varchar2(40)	?	N	TBD	Y	N	?	Read only	Create/modify
Processor speed		N	N	number(12,2)	?	N	TBD	Y	N	?	Read only	Create/modify
Cores per processor		N	N	number	?	N	TBD	N	N	?	Read only	Create/modify
No. of processors		Y	N	number	?	N	TBD	Y	Y	?	Read only	Create/modify
Physical RAM (total)		Y	N	number	?	N	TBD	Y	Y	?	Read only	Create/modify
No. of internal hard drives		Y	N	number	?	N	TBD	N	Y	?	Read only	Create/modify
Environment		Y	N	varchar2(40)	?	N	TBD	N	Y	?	Read only	Create/modify

➤ Functional requirements for development

Relationship Matrix

		Hardware				Network				Application			
		Distributed Server	Mainframe	Storage	Server Appliance	Firewall	Load/Balanc	Network Gear	VPN	Mainframe	Distributed	Desktop	Management
Network	Firewall	Connected to	Connected to		Connected to		Connected to	Connected to	Connected to	Connected to	Connected to		
	Load Balanc	Is a dependant of			Connected to	Connected to		Connected to	Connected to				
	Network Gear	Is a dependant of	Is a dependant of	Is a dependant of	Is a dependant of	Connected to	Connected to		Connected to				
	VPN					Connected to	Connected to	Connected to					
Application	Mainframe	Running on	Running on			Connected to					Connected to		
	Distributed	Running on	Running on		© JJ	Connected to	Depends on			Connected to			
	Desktop	Running on	Running on										
	Management	Running on	Running on										
Database	Oracle	Running on	Connected to	Connected to	Running on						Is a dependant of		
	MSSQL	Running on		Connected to									
	DB2	Connected to	Running on	Connected to									
	IMS	Connected to	Running on	Connected to									

Real World Relationships



Change Management

- 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 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

Urgency	Lead Time
Top	< 3 Days
High	3-7 Days
Medium	8-30 Days
Low	> 30 Days

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

IT-2-B - IT Service Management Suite
IT Service Management

Welcome: SUSAN RYAN

Change Impact Questionnaire = Required field

Change number: CHG14697

Extent of organizational impact: External Customers

Impact if change is not implemented or fails: Part of the functionality will not be available

Duration of change activity: 15 to 60 minutes

Scheduling/outage requirements: No Outage to Customer

Resources required to execute this change: 1 department

Backout difficulty: Moderate (15 to 60 minutes)

Change can be tested prior to production: Yes

Change has history of repeatable stability: Yes

Priority Matrix

	Impact			
Urgency	Low	Medium	High	Top
Low	CM 4	CM 4	CAB 2	CAB 2
Medium	CM 4	CM 3	CAB 2	CAB 2
High	CM 3	CAB 2	CAB 2	ECAB 1
Top	CM 3	CAB/ECAB 2/1	ECAB 1	ECAB 1






















- Higher priority requires increased level of scrutiny prior to approval

Approvals

Approval Body	Approval Medium
ECAB	On demand Virtual / Electronic / In person / Phone
CAB	Bi - weekly
Change Manager (CM)	Virtual / Electronic
CM/Standard	Virtual

- Lower priorities approved virtually

Forward Schedule of Change

5	6	7	8	9	10
<p> CHG24721 - WSS - Deploy to production - Release 02.02 Build 5 (02:00 to 07:00)</p> <p> CHG24695 - DADS/Plus Maintenance CICS Test (05:00 to 06:00)</p> <p> CHG24930 - SR #35506 - Small Group Renewal - Letter Changes (06:00 to 06:15)</p> <p> CHG24960 - Update MPTRPS table - SRs #34651, 34731, 35489, 35576 and 35752 (06:00 to 06:15)</p> <p> CHG24789 - SR #34862 - Cert of Health Letter - Changes of Insta Care business (06:00 to 06:05)</p>	<p> CHG24635 - Copy IDR production database to quality environment (16:00 to 20:00)</p> <p> CHG24452 - Create COB letter processing within Workdesk (20:15 to 21:00)</p> <p> CHG24645 - PDPK IRAPS: Create new table and add 2 columns to T_GRP_APP (20:15 to 20:30)</p>	<p> CHG24900 - MR17 - Lotus Policy Update - to PILOT group only (Lotus ports) (08:00 to 08:15)</p> <p> CHG24647 - Tech Upates Q2-2009 - IT Internal (to Lou's group) Pre-Pilot (16:30 to 17:00)</p> <p> CHG24898 - ZbxVPM upgrade and patching to version 3.3.3 (20:15 to 21:15)</p> <p> CHG24865 - Cyclic Upgrade BSI Tax Factory 8.0L (21:00 to 21:30)</p>	<p> CHG24704 - Add bluecrossmn.com/tv directory to bluecrossmn.com production junction. (04:00 to 06:00)</p> <p> CHG24051 - P Solaris Security Compliance (05:50 to 05:59)</p> <p> CHG24928 - Replace WAAPDSUT with IEBGENER and SORT (10:00 to 10:15)</p> <p> CHG23978 - Standard SuperOp TA Load (21:00 to 21:30)</p>	<p> CHG24660 - Install Complete package of Oracle Client 9i in all Informatica servers. MR39 (12:00 to 13:00)</p> <p> CHG24727 - Modify Postini Production Config to send Quarantine Notifications daily instead of 7 days (19:00 to 20:00)</p>	<p> CHG24903 - MR17 - Lotus Policy Update - Production users (Lotus ports) (09:00 to 09:15)</p> <p> CHG24832 - PDF extract for new Value network (12:00 to 12:05)</p> <p> CHG24378 - Update STAR production wth McKesson's ClaimCheck 8.5.43 (20:00 to 20:15)</p>

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

Extent of organizational impact Environment	One customer and not exec	Several customers affected or an exec	Whole org, complete dept or building or external customers
	T	1	3
I	2	4	5
Q	3	5	7
P	4	7	10

Criticality of Service Type	Informational	Request for Service	Degradation	Disruption
	Tier 3	1	1	3
Tier 2	1	2	5	7
Tier 1	1	3	6	10

Low – 2 – 5
 Medium – 6 - 12
 High – 13 - 16
 Top – 17 – 20

Urgency – The Human Factor

Urgency

Urgency Factor	Low	Medium	High
Desired Service Restoration from ticket creation	>2 days (Low Impact default)	1-2 days (Medium impact default)	Requesting Same day (High/Top default)

Priority

Priority

URGENCY	IMPACT			
	Low	Medium	High	Top
Low	4	4	3	3
Medium	4	3	2	1
High	3	2	2	1

- Priority drives process and escalation

Escalation

	Response Esc 1	Response Esc 2	Escalation Hours
Priority 1	30 minutes	45 minutes	24x7
Priority 2	30 minutes	45 minutes	24x7
Priority 3	60 minutes	N/A	M-F 6a-8p
Priority 4	4 hours	N/A	M-F 6a-8p

- 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

News	
! MINC11151: Aurora Network Connectivity: The Aurora claim center momentarily lost network connectivity which affected phones and their Novell network connections. The phones are back up, but some users are unable to re-connect to the Novell network.	03/30/2009
! MINC11150: STAR: Users in Aurora and Virginia are experiencing latency in STAR. It is taking 5-10 minutes before it progresses to the next screen. Due to this issue some users are abandoning.	03/27/2009
! MINC11149: FOCUS Contact History: Some users are receiving an error "service unavailable" when they try to view	03/26/2009

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

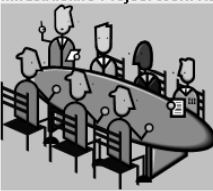
IT Intake Processes

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

IT Infrastructure Project Intake

Request Center Item - Infrastructure Project Request

Infrastructure Project Work Request



Infrastructure projects are those where one or more infrastructure division resources (engineering, storage, network, operations, security, etc.) are required. Infrastructure projects are often offshoots from Strategic Projects, but also may be stand-alone 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 bi-weekly 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.

Request this Item

Delivery time 17 days

[Submit Request](#)

[Save as Draft](#)

[Contact Us](#)

Request Cart

Empty

What is the title of your project?

What is your requested project start date?

Select one category that best fits your project type.

- ▶ More information
- Mandate
- Strategic
- Security, Compliance or Disaster Recovery

What is the desired project implementation date?

- Less than 1 month
- 1 to 3 months
- 3 to 6 months
- Greater than 6 months out

Request Status

My Requests		
Number	Name	Stage
RITM10310	Infrastructure Project Request	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

My Requests		
Number	Name	Stage
RITM10310	Infrastructure Project Request	<input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Prepare for Project presentation to Governance Steering Committee (Closed Complete) <input checked="" type="checkbox"/> Resource Assignment / Project Implementation (In Progress) <input type="checkbox"/> Completed (Pending - has not started)

- 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 2008 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 set 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 zLinux 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 BCBSMN 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.

 <h1>IT Toolkit</h1>	
Availability Management	
Capacity Management	
Change Management	
Configuration Management	
Enterprise Master Control Center	
Financial Management for IT Services	
Incident Management	Critical Success Factors, Key Performance Indicators & Metrics
IT Service Continuity Management	Forwarding IT2B Notifications to Pagers and Cell Phones
Knowledge Management	Group Information
Problem Management	Hierarchical Escalation Matrix
Release Management	IM Policy
Request Management	IM Roles and Responsibilities
Security	IM Strategy, Scope, Goals, Benefits
Service Desk	Impact/Urgency/Priority
Service Level Management	Incident and Request Leadership Training
	Incident Management Training Webinar
	Kickoff Presentation
	On Call Rota User Guide
	Phase Diagram, Physical Flow, Process, Procedures, Work Instructions
	Relationships
	Request for Incident Creation Rights
	Setting up Blackberry Filters for IT2B Incident Notification
	Specifications
	Tier One Applications List
	<u>User Guide - Managing Incidents in IT2B</u>

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.....

Priority Levels.....

Escalation Guidelines.....

Major Incidents.....

Logging In.....

The Incident Request Screen.....

Description of Incident Status Types.....

- It's not amazon.com
- Increases adoption rate

Incidents: From Sta **1. Select **Create New** from the Incident Management menu section in the left panel. *This button is only visible to individuals with Incident Owner rights.***

Creating a New Incid

Accepting an Incider

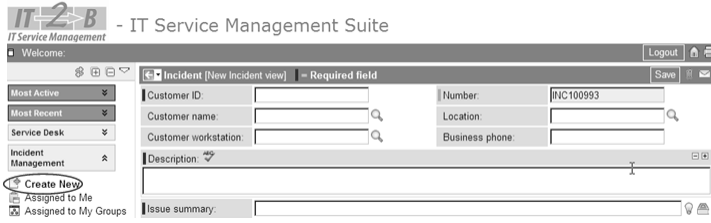
Working on an Incid

Resolving the Incid

Linking Related Inc

Incidents Caused t

E-mailing the Cust



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?”

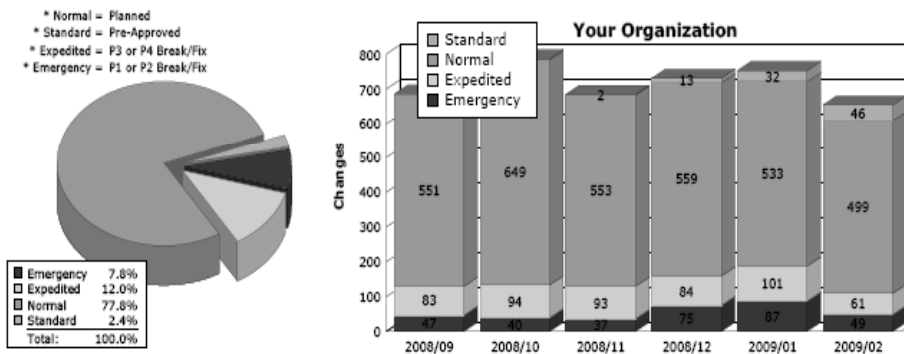
Continual Improvement

- 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!!!

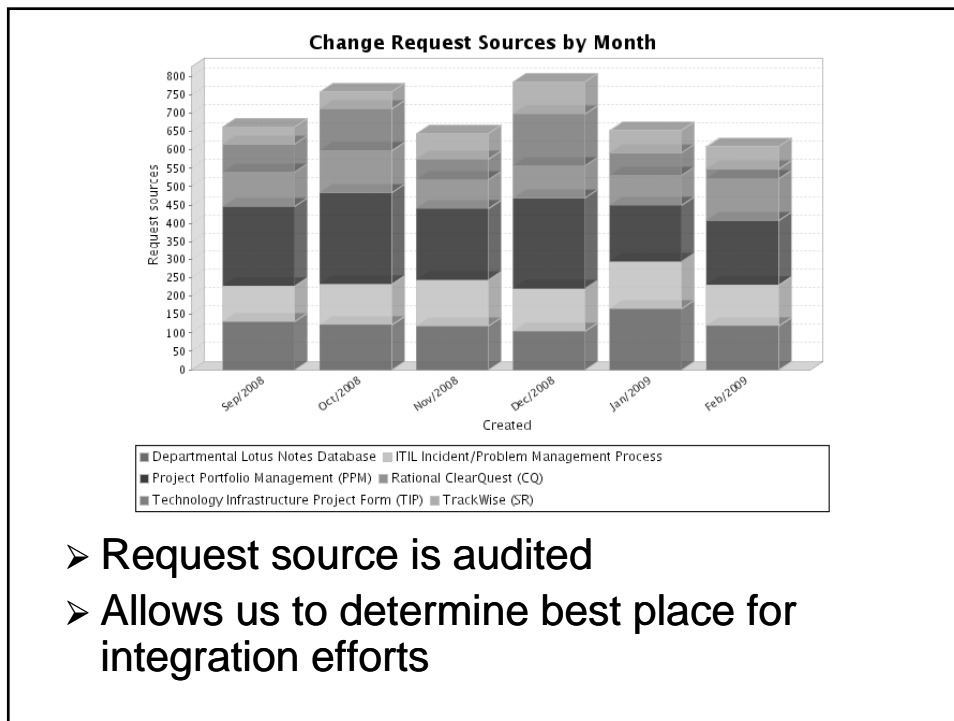
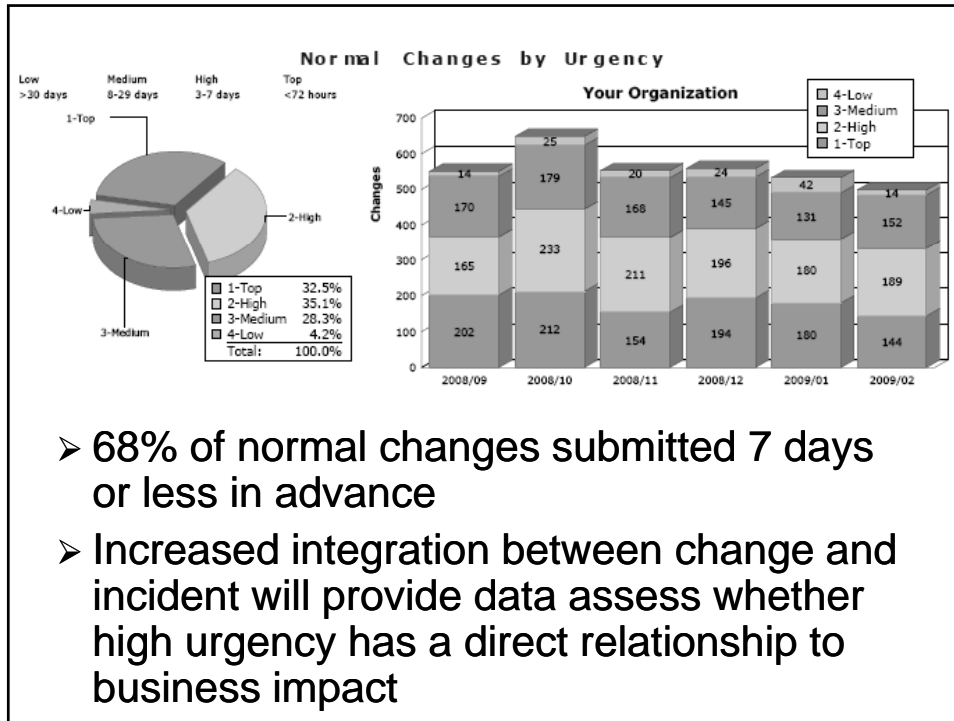
Results/Metrics

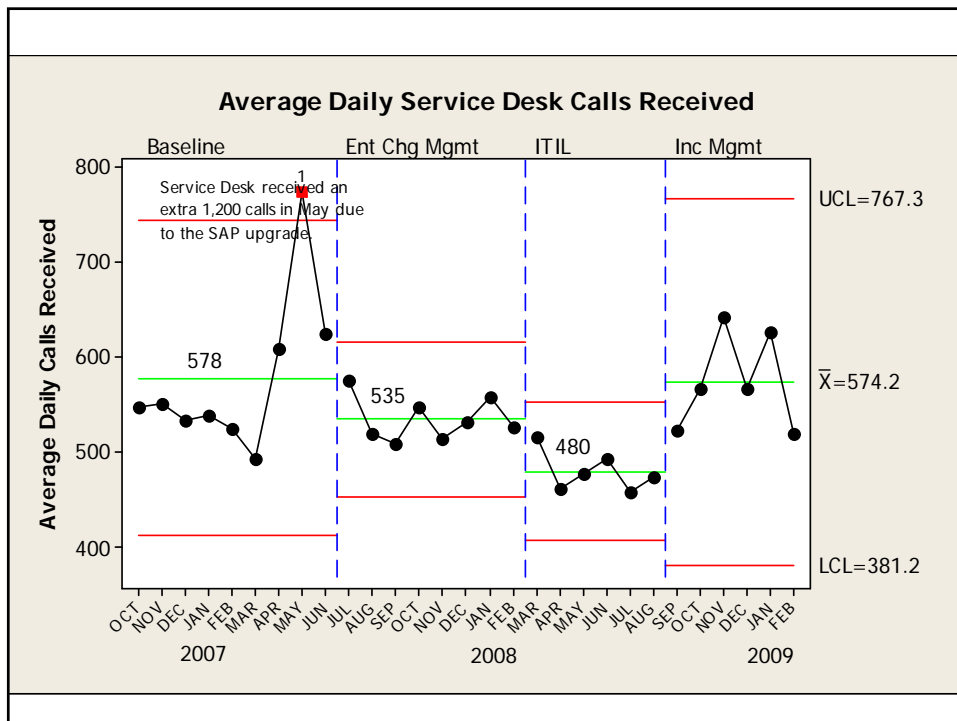
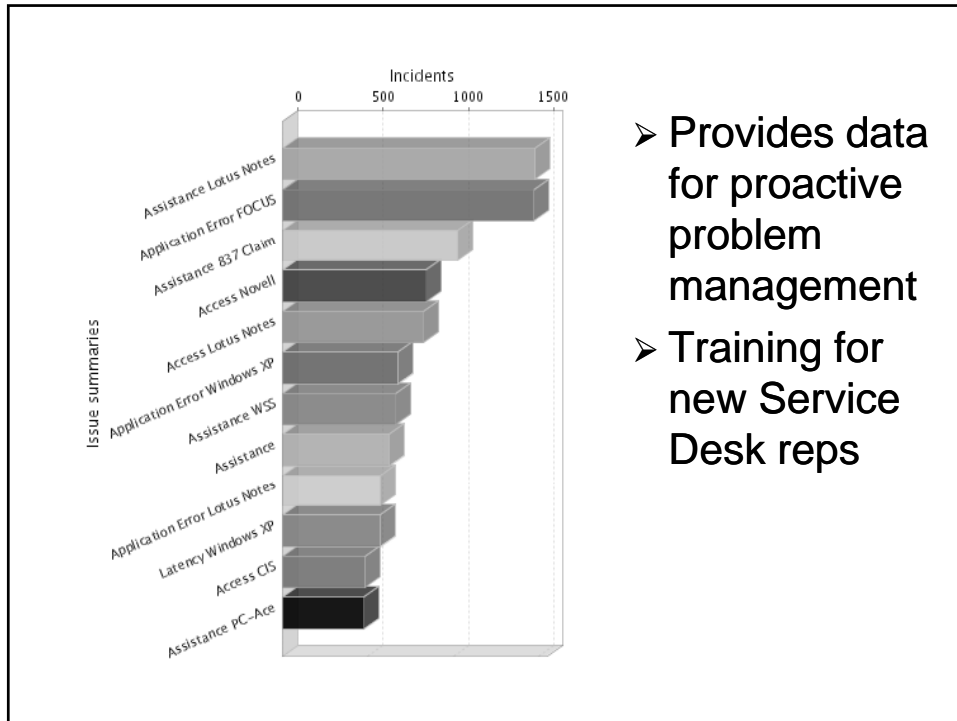
- Key Performance Indicators
- Critical Success Factors
- Metrics
- Reports
 - Push vs. Pull
 - Frequency
- Customer Satisfaction

Changes by Different Types



- Emergency/Expedited = Break/Fix (new applications implemented at year end – with defects!)
- Standard = Preapproved (new standard change templates added)





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 02/02/2009.	
How well were your expectations met on this service transaction?	
<input type="radio"/> Exceeded Expectations <input checked="" type="radio"/> Met Expectations <input type="radio"/> 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 Facets not working and another to get a new version of Trol pushed out to my computer. Trol was done in 10 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.	
<input type="radio"/> Yes <input checked="" type="radio"/> No	

Infrastructure Project Report

Project title	Score weighted	Overall priority	Status budget	Status risk	Status schedule	Status scope
Modeler and Pricer Conference Room Pilot	8.55	01 a	Y	G	G	Y
Establish VPN Access for TriZetto	8.55	01 b	Y	G	G	Y
Data Center Move Project	6.75	02	G	G	G	G
Replace failing cash processing remit	7.75	03				
Oracle UCM Email Content Archiving Project	6.75	04	G	Y	Y	G
Distributed Build Release Process Improv...	7.05	05	G	G	G	G
Wireless Employee Access	7.65	06	G	G	G	G
Discover Phase 3 - Role Based Access Cont...	7.22	07	G	G	G	G
Administrative Simplification	8.7	08	Y	R	R	Y
ITSM 2009	7.75	09	G	G	G	G
ITS 10.3 & Blue2 3.2	8.12	10	G	G	G	G

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

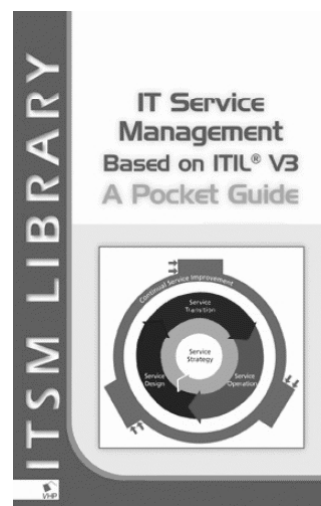
You don't need automation for IT Service Management...



- 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