

# ITIL in the Workplace

The Practical Application of a  
Best Practice Framework

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April 3, 2009



# 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!

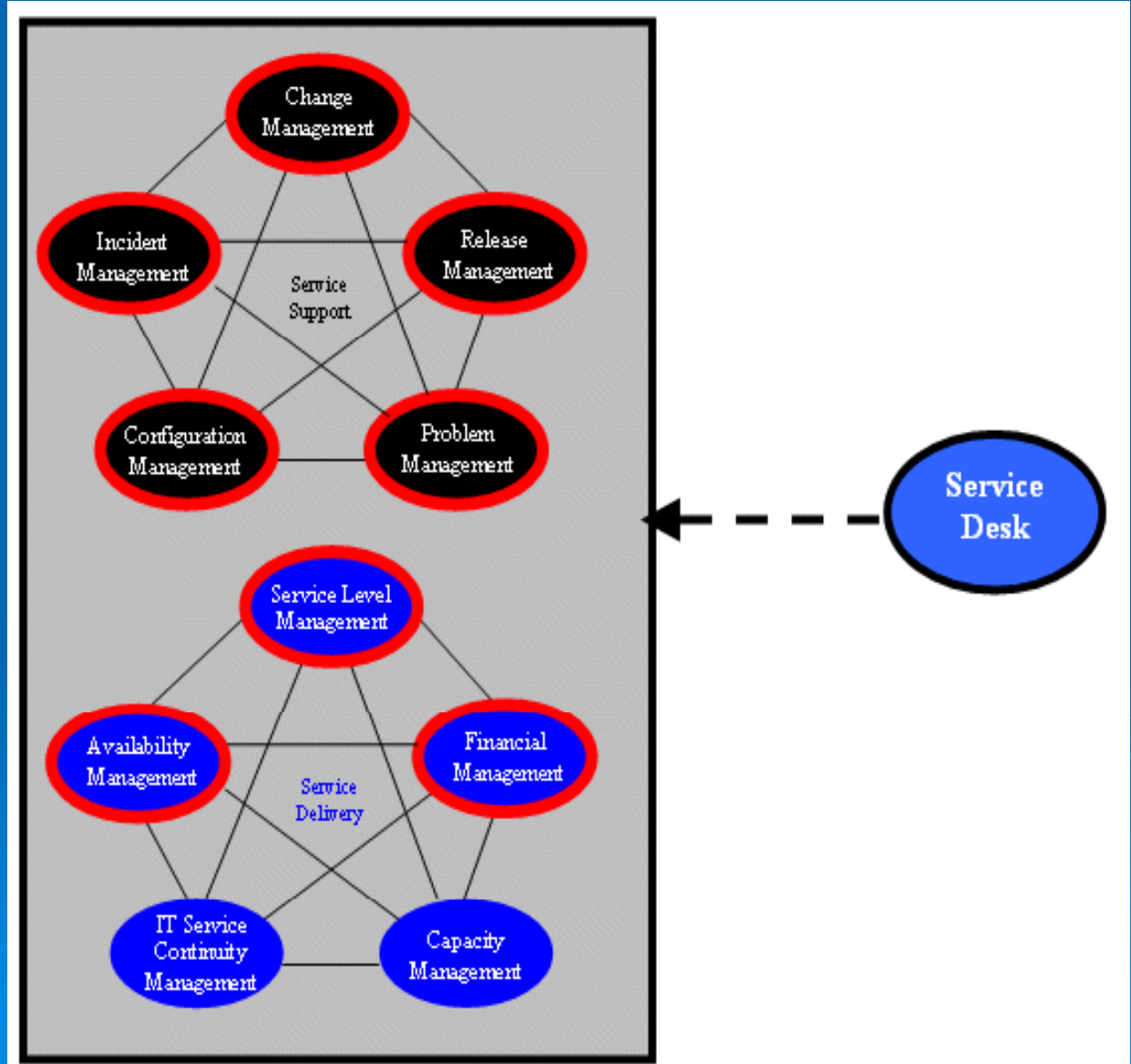


# ITIL 101 – Briefly!

- 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

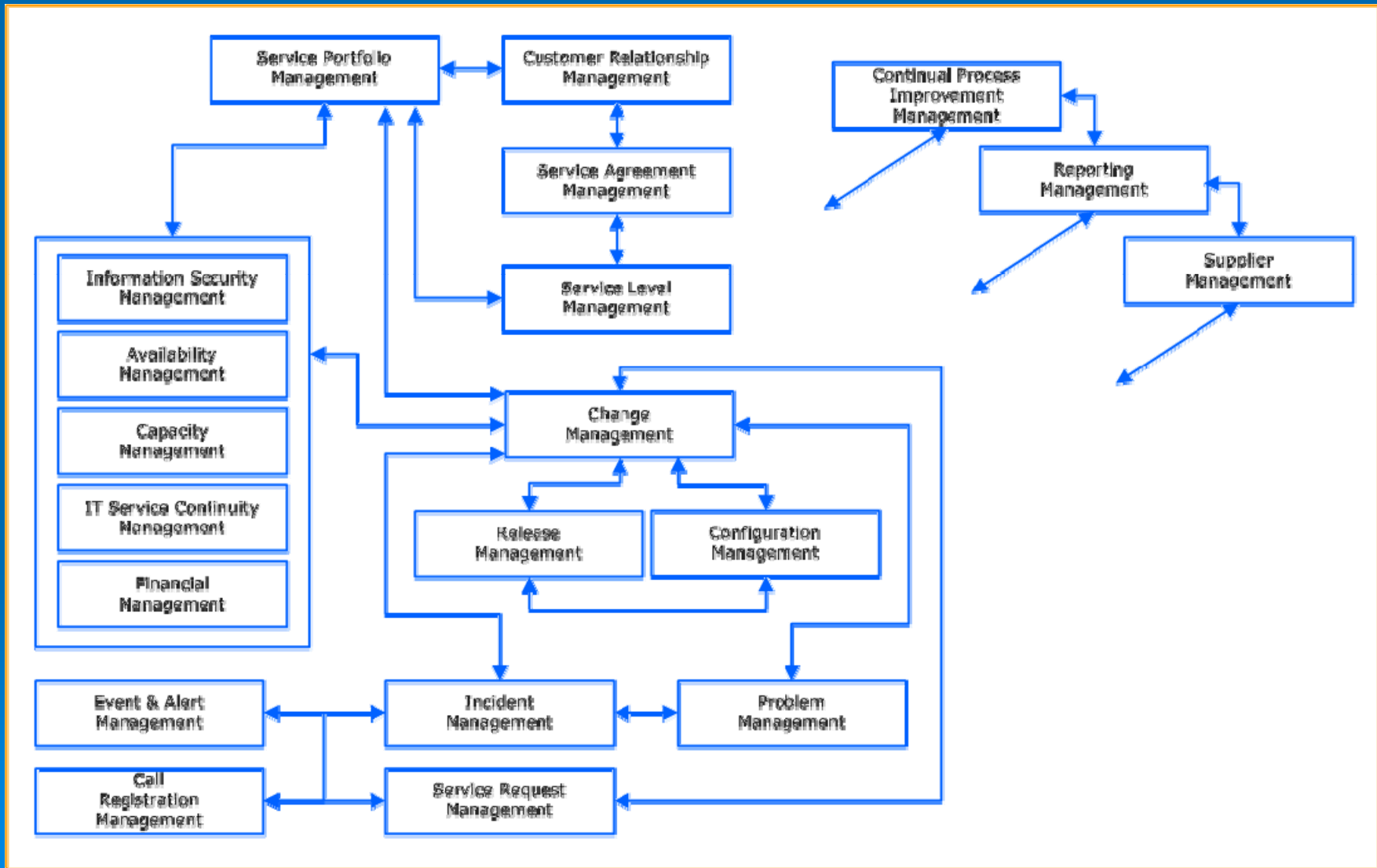


- Lifecycle of a Service
  - Strategy
  - Design
  - Transition
  - Operation
  - Continual Improvement

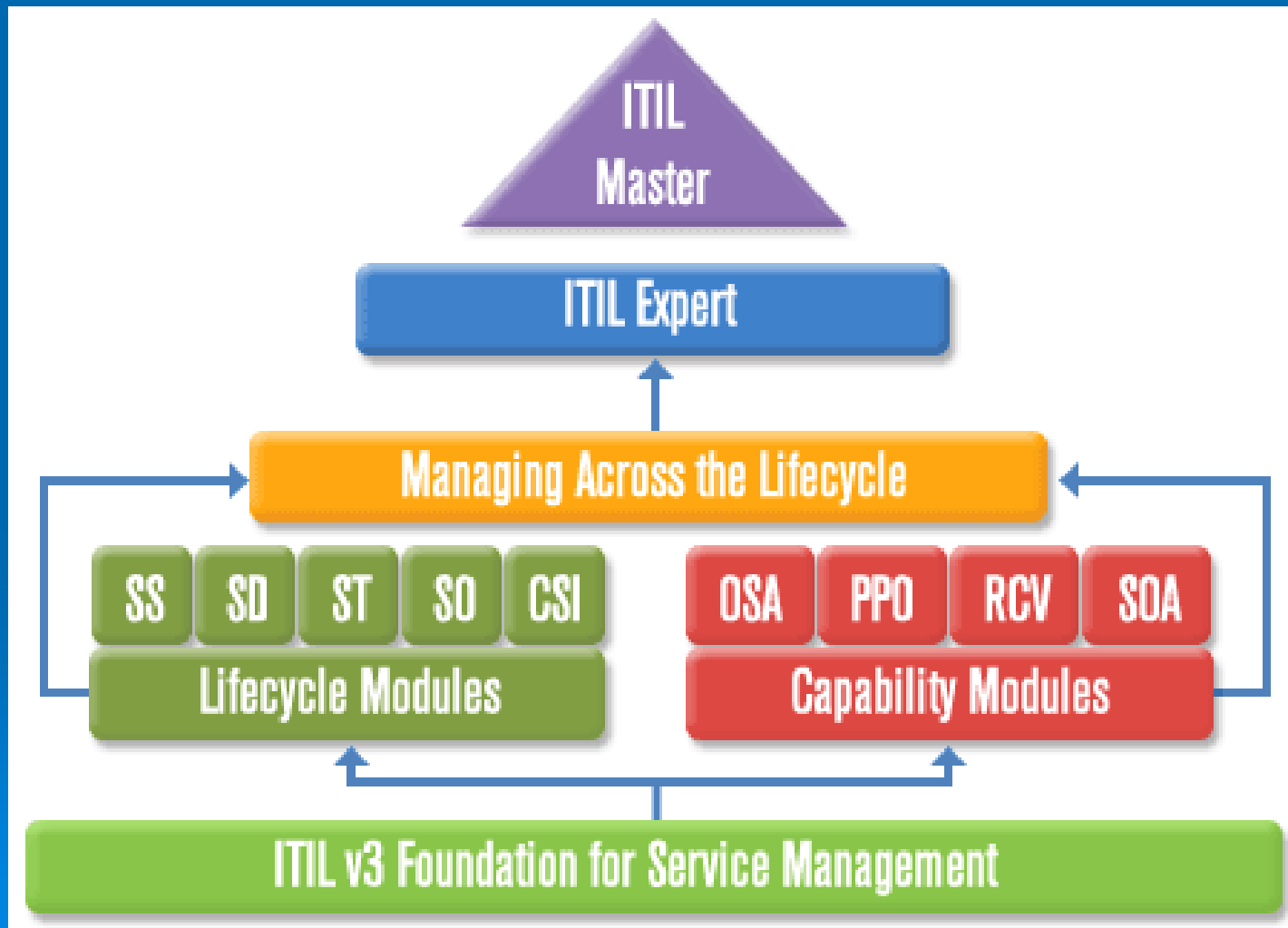


- The processes are still there
- Each process becomes important at a point in service development

# Process Dependencies



# ITIL Training and Certification



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

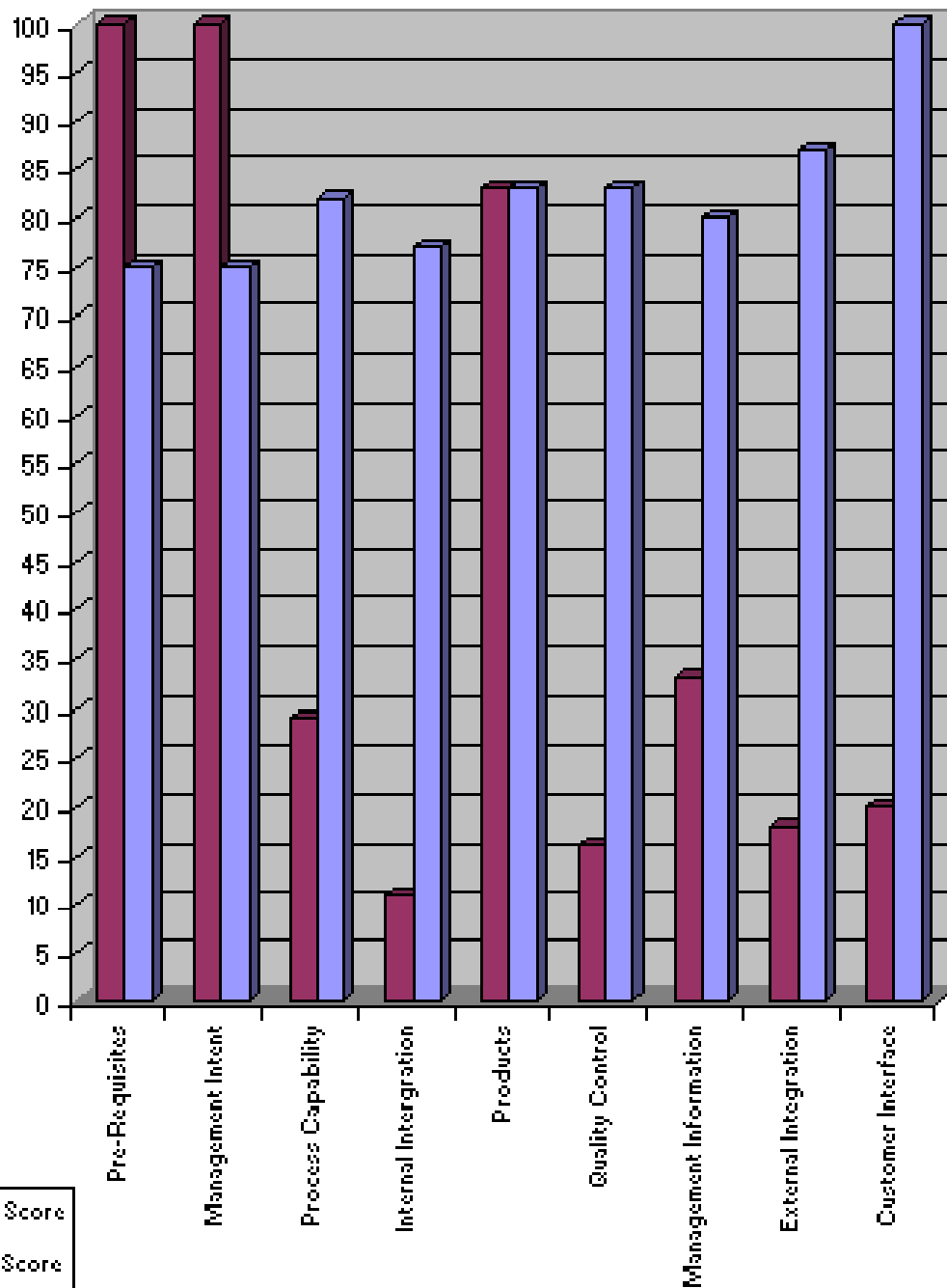
➤ Maturity Assessment

- 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

## Change Management Results



- 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 organisation, 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 organisation?               | Yes |
| 5. | Has the scope of change management activity been established within the organisation?                      | Yes |
| 6. | Does the organisation have standards or other quality criteria for the raising and registering of changes? | Yes |

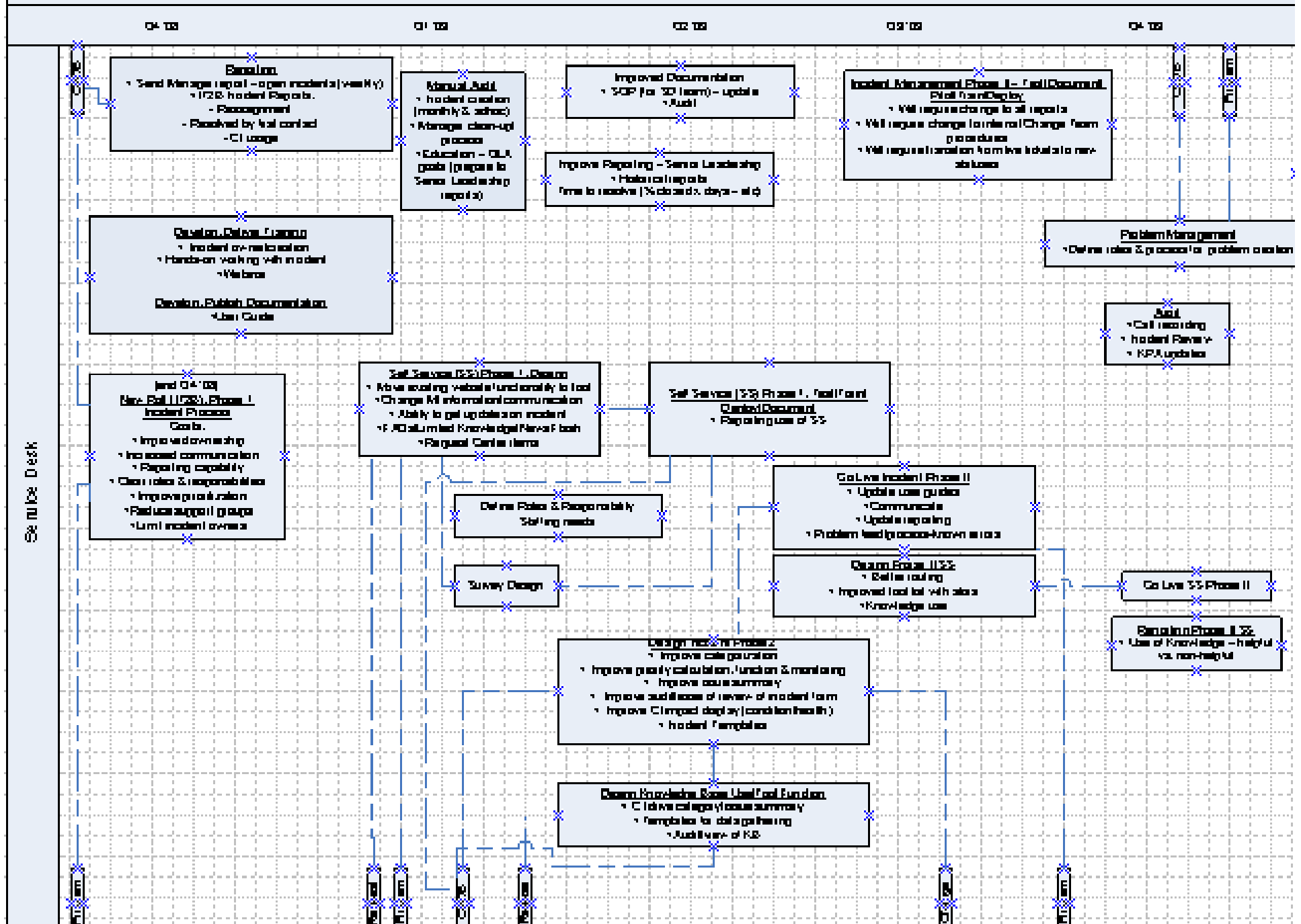
### Level 2: Process Capability

- |     |   |     |
|-----|---|-----|
| 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



# 2008 / 2009 Service Desk / Incident Management 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)

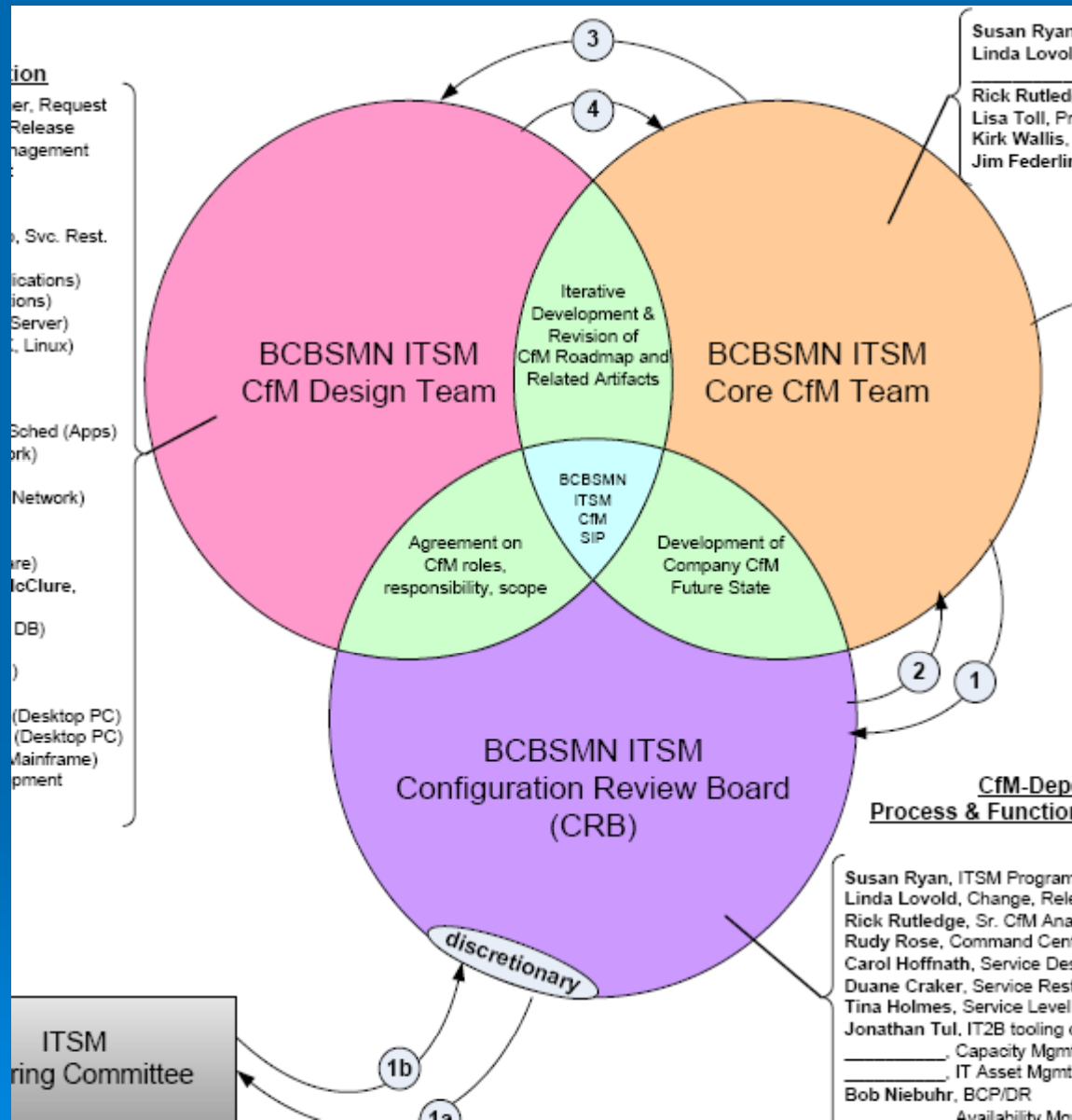
# Policy

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



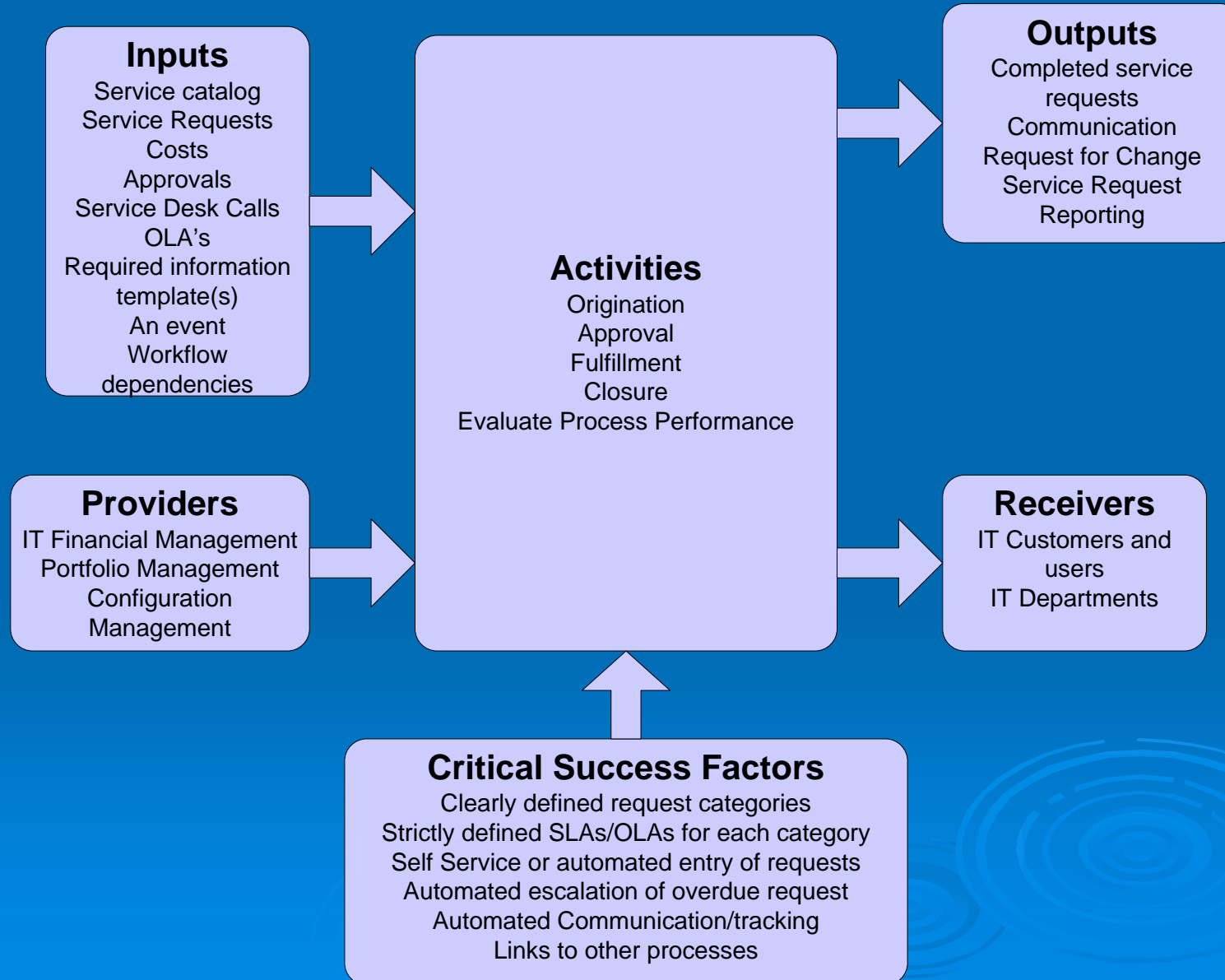
# Project Deliverables

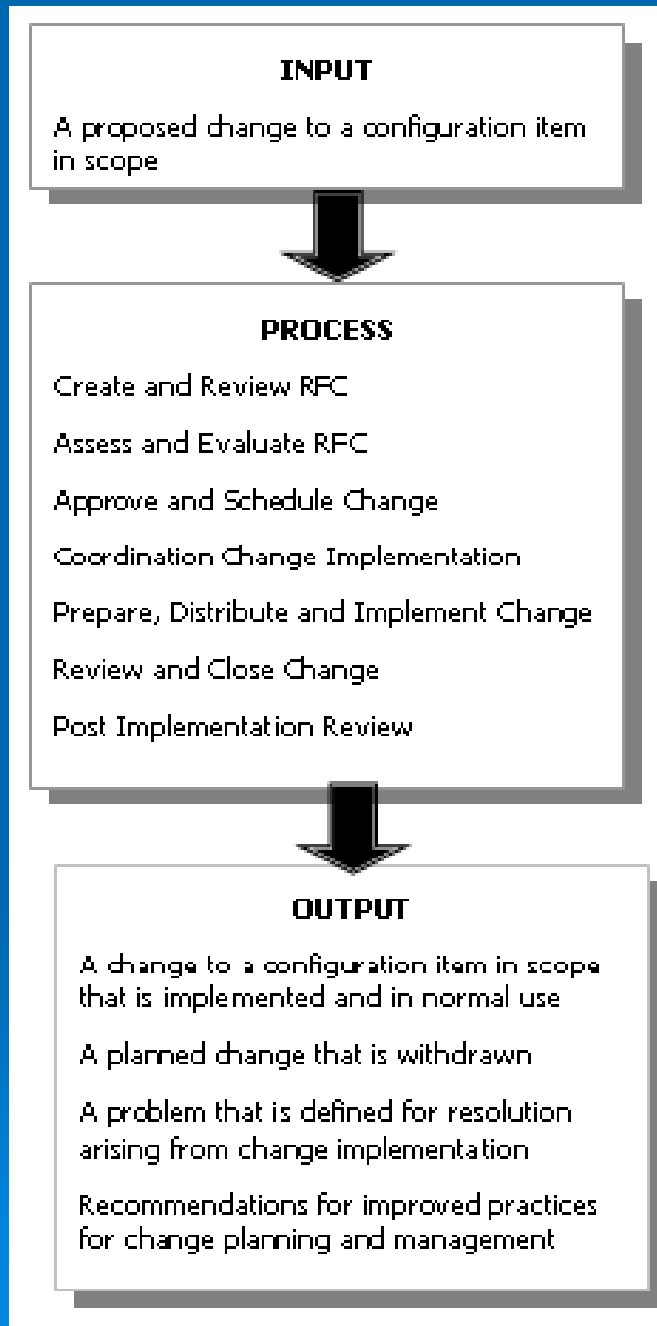
- Roles and Responsibilities
  - Logical Flow
  - Physical Flow
  - ARCI and Work Instructions
  - Functional Requirements
  - Test Cases
  - KPIs/Metrics and Reports
  - Audit Involvement
- 

# Roles and Responsibilities

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

# Logical Flow





- Logical flow provides high level understanding of activities associated with the process

# Physical Flow

**Service Request Fulfillment**  
12.5 Evaluate Process Performance  
Generic Flow for IT2B



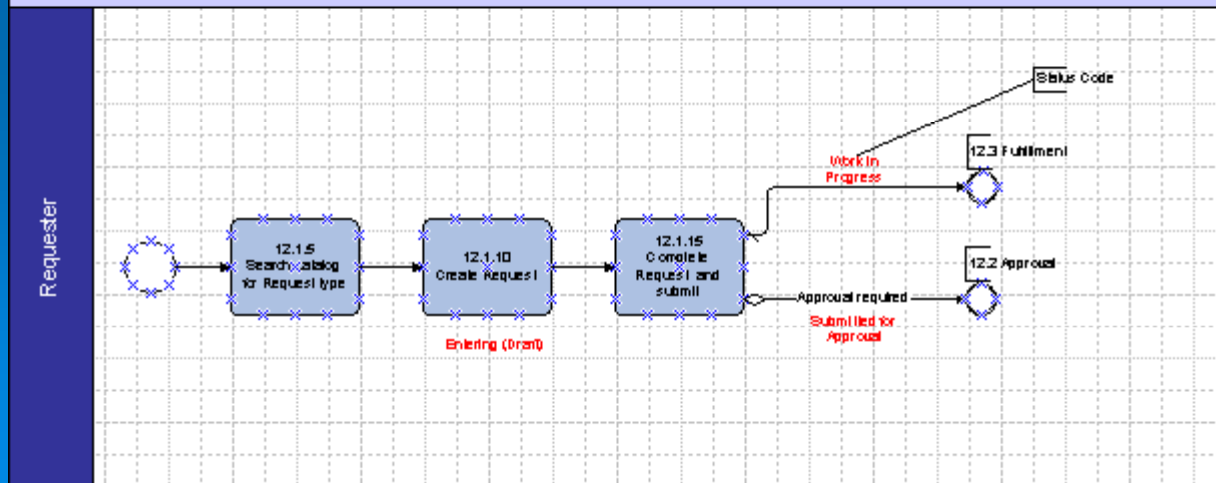
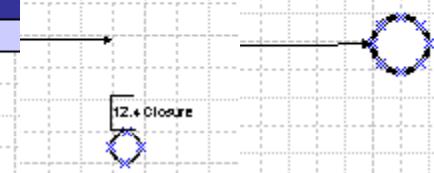
**Service Request Fulfillment**  
12.3 Fulfillment  
Generic Flow for IT2B



**Service Request Fulfillment**  
12.2 Approval  
Generic Flow for IT2B



**Service Request Fulfillment**  
12.1 Origination  
Generic Flow for IT2B



# 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

# Configuration Management

- Value is in increased efficiency and effectiveness of other ITSM processes
  - Relationships
  - Impact assessment
    - Maintenance windows
    - Criticality tier
    - Causality
    - Collision control

# CMDB Structure

Category	Class	Prefix	Configuration Item (CI)	Service Attributes					Common Attributes										Specific Attributes											
				Support hours	Maintenance window	Response target	Business contacts	Business service BRM	Category	Class	Search Code	CI Name	Description	CI Owner	Support Group	Operational Status	Service	Creation Date	Modification Date	CI Discovered	QC Required?	Comments / Notes	Vendor	Manufacturer	Model	Environment	Version	Patch Level	Release	
Database	Oracle	ORA	Oracle Server Instance1	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			Oracle Server Instance2	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
			Oracle Server Instance3	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
	MSSQL	SQL	SQL Server Instance1	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			SQL Server Instance2	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
			SQL Server Instance3	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
	DB2	DB2	DB2 Instance1	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			DB2 Instance2	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			DB2 Instance3	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
	IMS	IMS	IMSInstance1	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			IMSInstance2	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			IMSInstance3	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X
	UDB	UDB	UDBInstance1	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			UDBInstance2	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	
			UDBInstance3	-	C	-	-	-	C	C	✓	✓	✓	✓	✓	✓	C	✓	✓	✓	✓	✓	✓	X	X	X	X	X	X	X

## Distributed Server Class

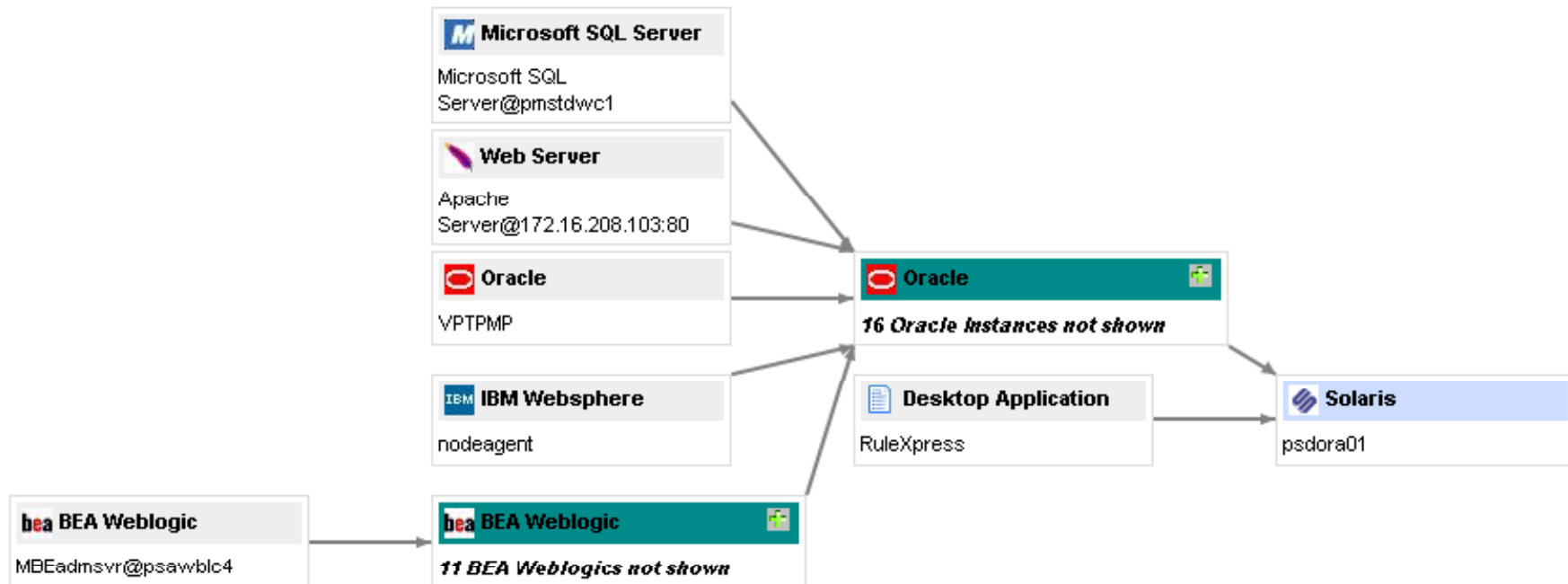
Category prefix	HW
Class prefix	DIS
Search Code	HW-DIS
Description	
Discovered?	Yes
Reconciled?	TBD
Reconcile Description:	

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



# 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 Service Management Suite

Welcome: SUSAN RYAN

Change Impact Questionnaire **|** = Required field

Change number:	<input type="text" value="CHG14697"/>
Extent of organizational impact:	<input type="text" value="External Customers"/>
Impact if change is not implemented or fails:	<input type="text" value="Part of the functionality will not be available"/>
Duration of change activity:	<input type="text" value="15 to 60 minutes"/>
Scheduling/outage requirements:	<input type="text" value="No Outage to Customer"/>
Resources required to execute this change:	<input type="text" value="1 department"/>
Backout difficulty:	<input type="text" value="Moderate (15 to 60 minutes)"/>
Change can be tested prior to production:	<input type="text" value="Yes"/>
Change has history of repeatable stability:	<input type="text" value="Yes"/>

**Update**

# 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


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

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

<b>Type</b> <b>Criticality of Service</b>	Informational	Request for Service	Degradation	Disruption
Tier 3	1	1	3	4
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*

		IMPACT			
URGENCY	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 connectons. 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 abending. 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

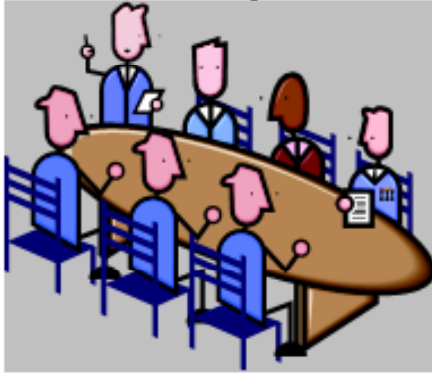
# IT Intake Processes

- 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
<a href="#">RITM10310</a>	Infrastructure Project Request	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

My Requests

Number	Name	Stage
<a href="#">RITM10310</a>	Infrastructure Project Request	<input type="checkbox"/> <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.



# IT Toolkit

**Availability Management**  
**Capacity Management**  
**Change Management**  
**Configuration Management**  
**Enterprise Master Control Center**  
**Financial Management for IT Services**  
**Incident Management**  
**IT Service Continuity Management**  
**Knowledge Management**  
**Problem Management**  
**Release Management**  
**Request Management**  
**Security**  
**Service Desk**  
**Service Level Management**

Critical Success Factors, Key Performance Indicators & Metrics

Forwarding IT2B Notifications to Pagers and Cell Phones

**Group Information**

Hierarchical Escalation Matrix

IM Policy

IM Roles and Responsibilities

IM Strategy, Scope, Goals, Benefits

Impact/Urgency/Priority

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

User Guide - Managing Incidents in IT2B

# 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

*Creating a New Inci*

*Accepting an Incider*

*Working on an Incia*

    Resolving the Inci

    Linking Related Inc


    Incidents Caused b

    E-mailing the Cust

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.*

The screenshot displays the 'IT Service Management Suite' interface. At the top, the logo 'IT-2-B' and the text 'IT Service Management Suite' are visible. Below the logo, there is a navigation menu with several options: 'Most Active', 'Most Recent', 'Service Desk', 'Incident Management', 'Assigned to Me', and 'Assigned to My Groups'. The 'Incident Management' option is expanded, and the 'Create New' button is highlighted with a red circle. The main content area shows a form for creating a new incident, with fields for 'Customer ID', 'Customer name', 'Customer workstation', 'Number', 'Location', and 'Business phone'. The 'Number' field contains the value 'INC100993'. The 'Description' field is currently empty. The 'Issue summary' field is also empty. The interface includes a 'Logout' button in the top right corner and a 'Save' button in the top right corner of the form area.

# 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

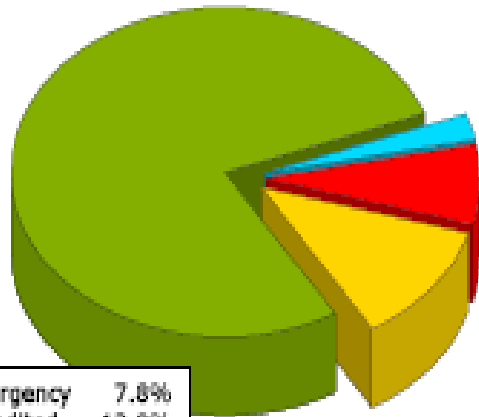
- Phased approach to application releases
  - They can only handle a certain amount of newness at a time
- Feedback from stakeholders about process “discomfort”
- Information gleaned from process metrics
- When are we done? Never!!!

# Results/Metrics

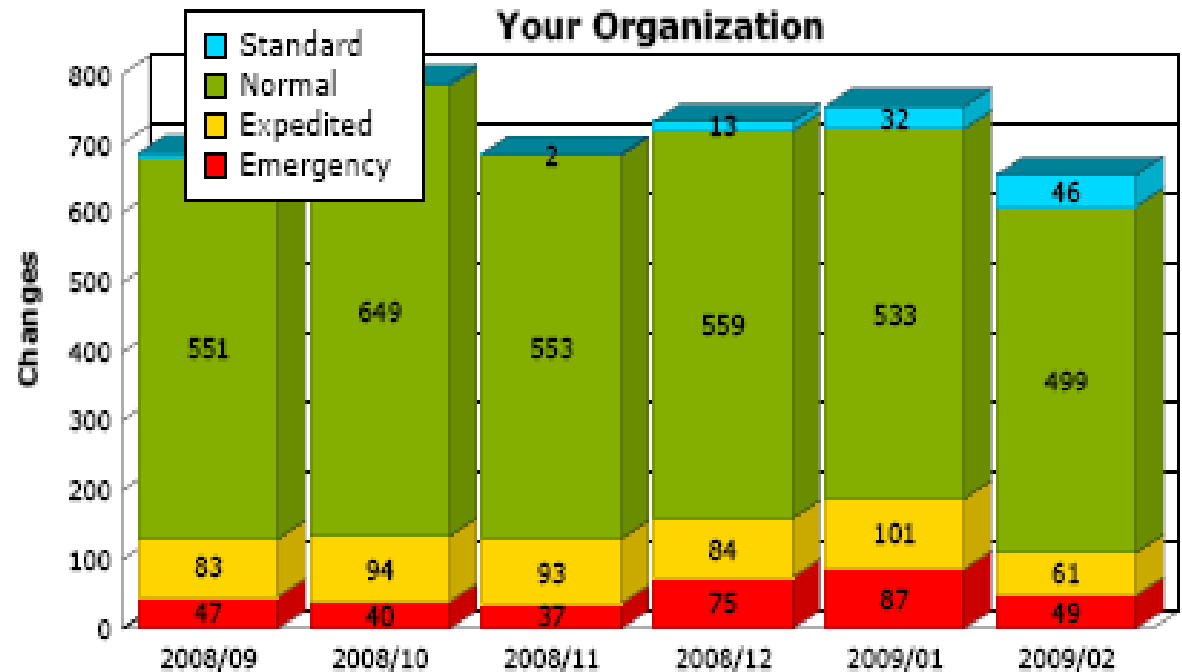
- Key Performance Indicators
  - Critical Success Factors
  - Metrics
  - Reports
    - Push vs. Pull
    - Frequency
  - Customer Satisfaction
- 

## Changes by Different Types

- \* Normal = Planned
- \* Standard = Pre-Approved
- \* Expedited = P3 or P4 Break/Fix
- \* Emergency = P1 or P2 Break/Fix

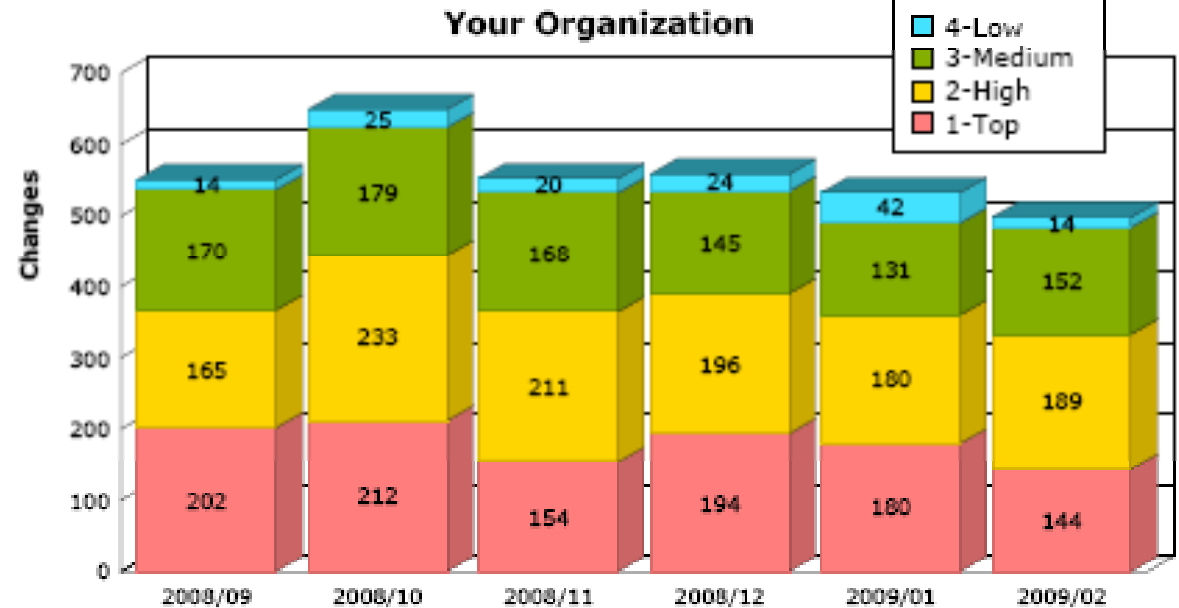
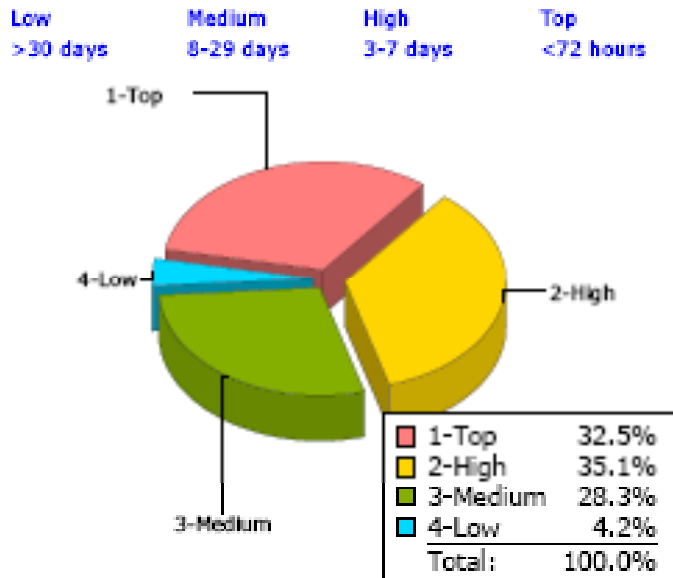


Emergency	7.8%
Expedited	12.0%
Normal	77.8%
Standard	2.4%
<b>Total:</b>	<b>100.0%</b>



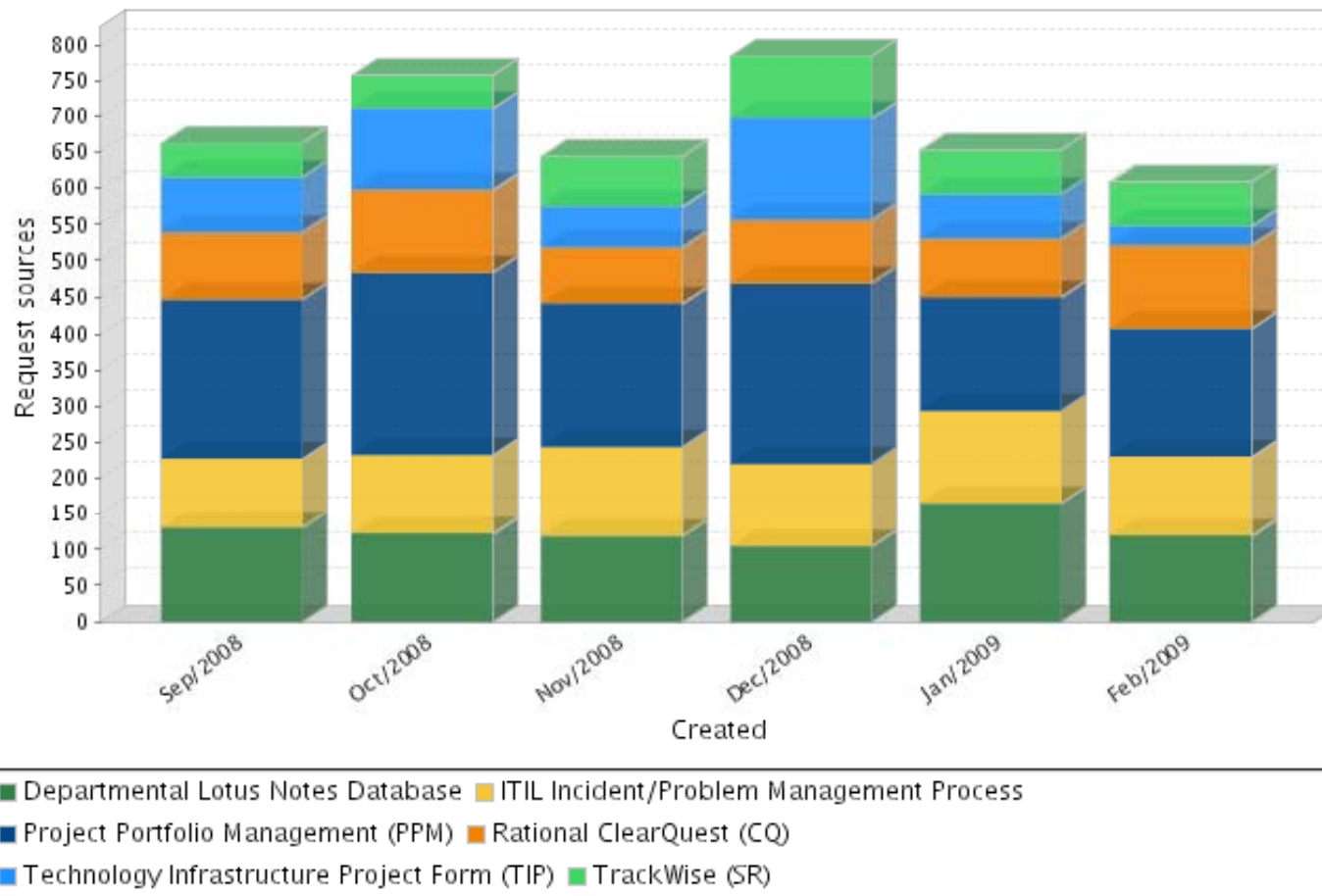
- Emergency/Expedited = Break/Fix (new applications implemented at year end – with defects!)
- Standard = Preapproved (new standard change templates added)

## Normal Changes by Urgency

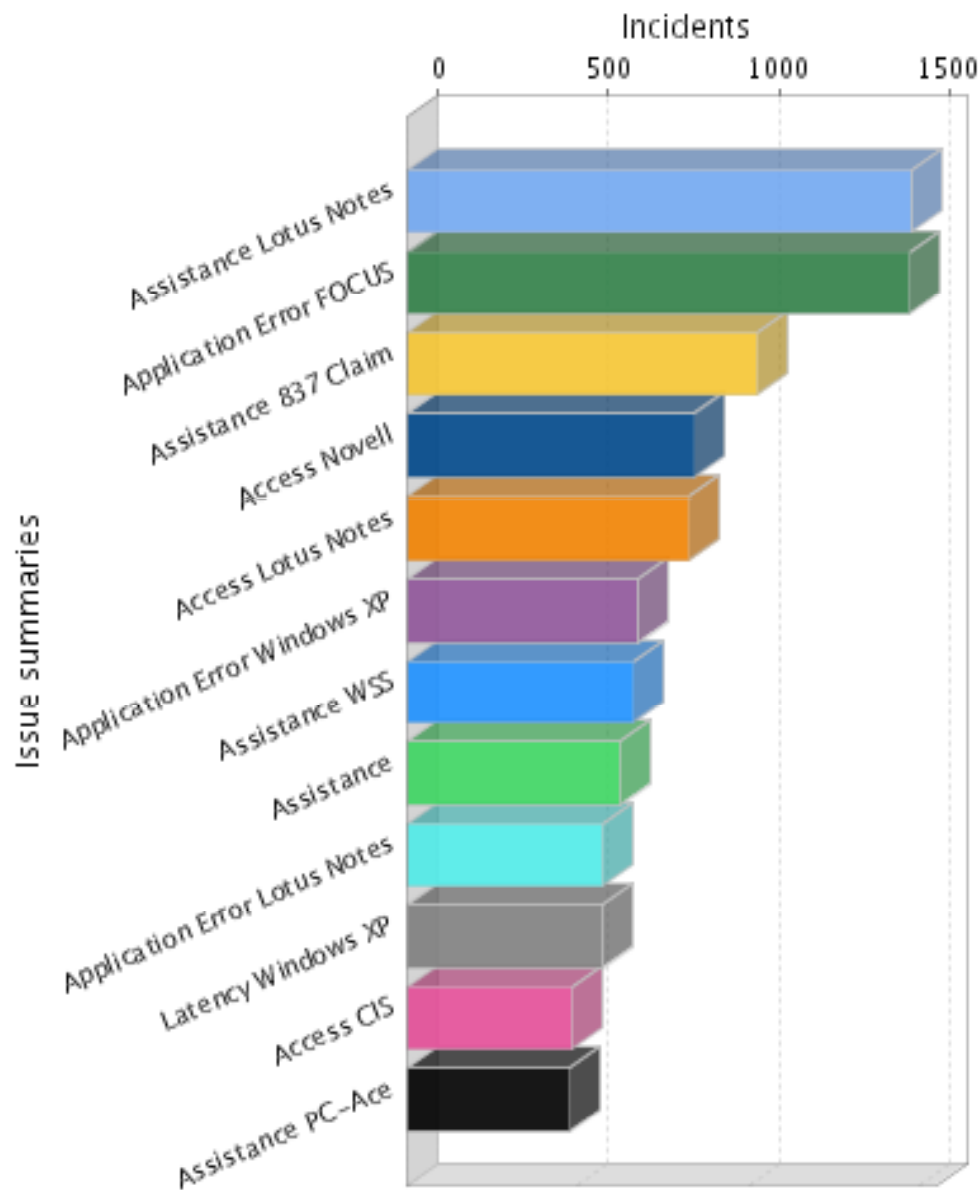


- 68% of normal changes submitted 7 days or less in advance
- Increased integration between change and incident will provide data assess whether high urgency has a direct relationship to business impact

## Change Request Sources by Month

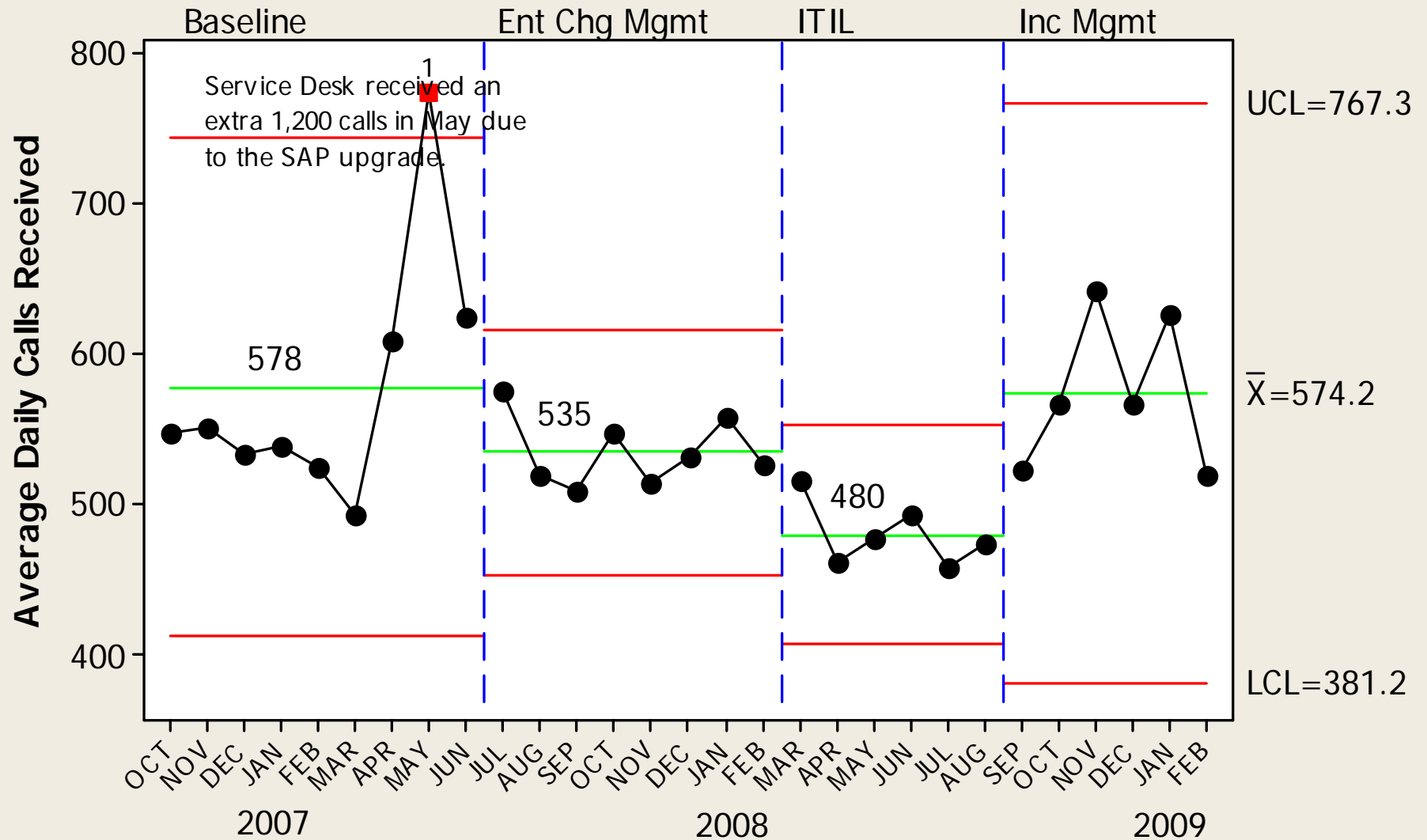


- Request source is audited
- Allows us to determine best place for integration efforts



- Provides data for proactive problem management
- Training for new Service Desk reps

## Average Daily Service Desk Calls Received



# 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?
<p>『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.』</p>
Do you have more comments to share? Ideas about how we can improve our service quality? Click <a href="#">yes</a> 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 Acces 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!

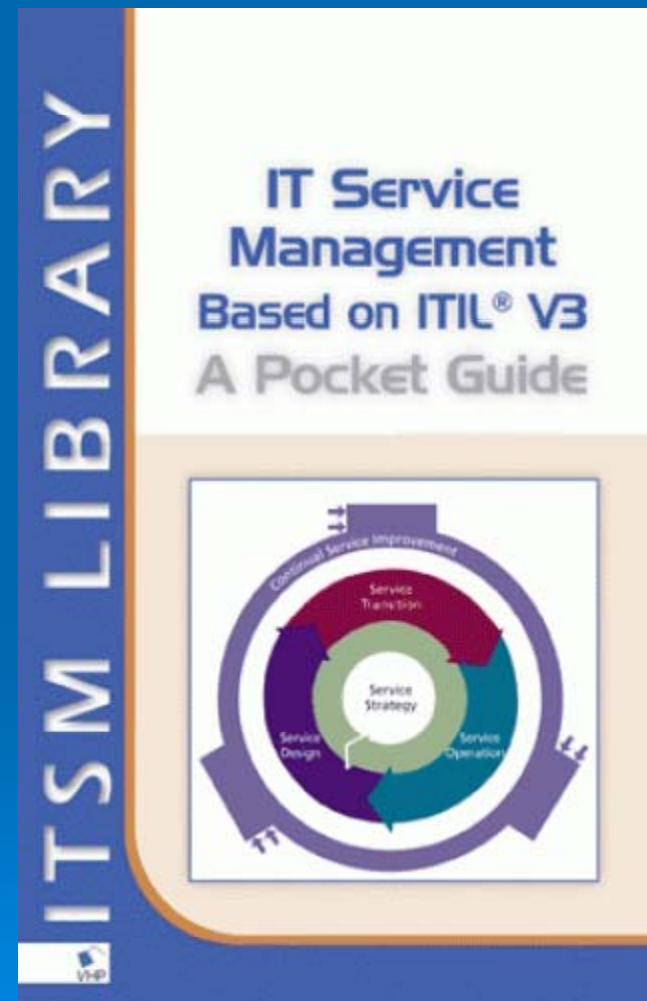
# You don't need automation for IT Service Management...



- We use [Service-now.com](https://www.servicenow.com) – and love it!

# ITIL Resources

- itSMF
  - Local Interest Group
  - [www.itSMFUSA.org](http://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](mailto:Susan_Ryan@bluecrossmn.com)