Nouri Associates, Inc.
Research Report
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ITIL & IT Service Management Roadmap

THE QUESTION: How to turn ITIL from a Myth to a Miracle?

THE ANSWER: Develop an Implementation Roadmap to address strategic business alignment and long term process improvement while producing short term results to solidify senior management support and commitment to this continuous improvement framework.

Below is a brief outline of a practical and proven approach. We have successfully used the ITIL (Information Technology Infrastructure Library) framework as the basis for our IT Service Management (ITSM) improvement campaigns. The approach ensures, with a high degree of confidence, that sustainable benefits for your business will be realized while developing the organizational skills to become self-sufficient.

Recently, there has been a considerable amount of hype about ITIL. Industry articles highlight outstanding successes as well as dramatic failures incurred by organizations pursuing an improved service management model. Vendors, consultants and CIOs all have jumped into the fray with their 'solutions'.

Based on my experience over the last two decades of assisting enterprises with the challenge of aligning IT services with critical business requirements, I have reached the conclusion that there is no 'silver bullet' solution. I believe that successful implementations are still based upon assuring synchronized and parallel actions focused on People, Process and Technology. Whether it is called ITIL, Service Management, Six Sigma or Continuous Improvement, they are all about bringing change into an organization without destroying its capabilities and interfering with daily operations.

The Nouri Associates, Inc. (NAI) Roadmap development is performed in three distinct steps that answer vital questions for your organization. The three steps are outlined below:

#1 INITIATIVE SETUP - "Do we have a common view of where we want to be?"
The tasks performed during this step are (1) Program administration setup, (2) Business & IT Executive Interviews, (3) Surveys & data gathering, (4) Initial training campaign, and (5) development of a common ITSM vision. There is considerable communication and involvement with key business executives during the setup step. The final roadmap will be presented to these executives (or a representative committee) for ratification and approval.

#2 CURRENT STATE ANALYSIS - "Where are we now?" This step contains the majority of the effort to complete a thorough assessment of the existing IT Service Management maturity. This step includes a significant contribution by the senior and second line IT management team and technical leads. The data gathering, surveys and executive interviews performed in the Initiative Setup step are used during the workshops attended by the core team members. The tasks performed during this step are (1) Process assessment workshops (5 sessions), (2) Technology assessment workshops (2 sessions), (3) Metrics assessment workshop session, (4) Roadmap development workshop (2 sessions), and (5) Roadmap report development (see Figure 1 below for an illustration of the assessment results).

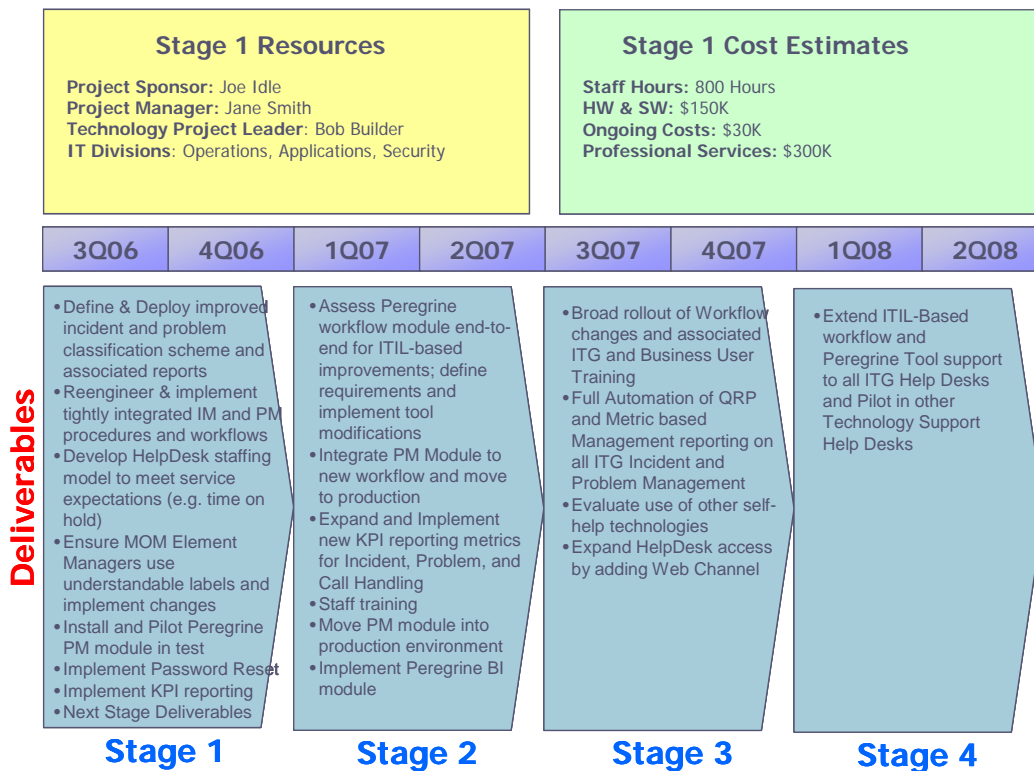*Figure 1 – Process Maturity Model*

Each of the ten ITIL processes plus Security Management and the Service Desk function is thoroughly assessed and scored for current maturity during the workshops. The 'Spider-gram' represents the consensus reached by the core team for the current and desired maturity level for each process area.

Maturity; 0-None, 1-Initial, 2-Repeatable, 3-Defined, 4-Managed, 5-Optimized
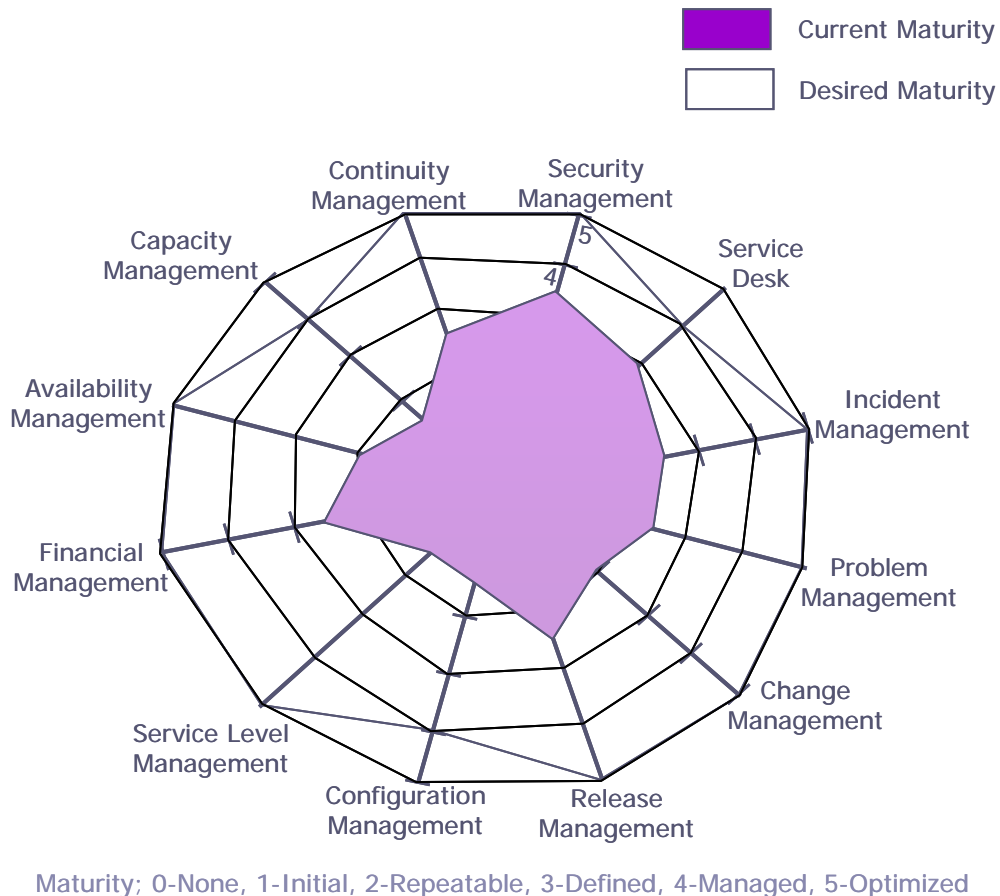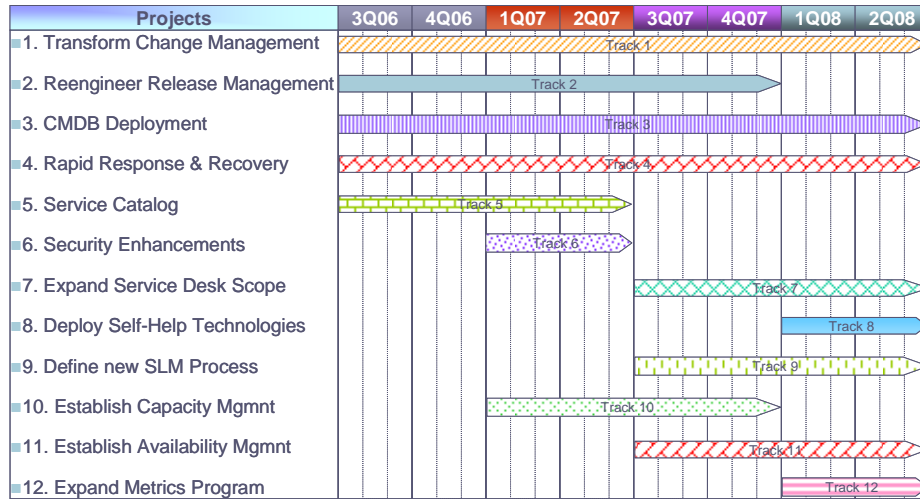
#3 STRATEGY DEVELOPMENT - "How will we get there?" The final Initiative Implementation Roadmap is developed from detailed Track Plans (Figure 2) and Track Overview. For each individual track we develop a comprehensive Overview containing (1) Track Name, (2) Priority, (3) Objectives, (4) Scope, (5) High-Level Milestones/Activities, (6) Stage 1 Preliminary Deliverables, (7) Expected Benefits, (8) Related Recommendations, (9) Critical Success Factors, (10) Potential Risks, (11) Key Measures/KPIs and (12) Stage 1 Investments. This overview provides the core team with enough information to begin Stage 1 of the implementation plan once the core team has ratified the Initiative Roadmap priorities. The Track Plans (Figure 2) position the Stage deliverables across multiple initiative stages so the cycle of turning the plans into budgeted projects instills a continuous improvement model within the IT support organization.

Figure 2 – Track Plan and Target Deliverables

Stage 1 Resources

Project Sponsor: Joe Idle
Project Manager: Jane Smith
Technology Project Leader: Bob Builder
IT Divisions: Operations, Applications, Security

Stage 1 Cost Estimates

Staff Hours: 800 Hours
HW & SW: $150K
Ongoing Costs: $30K
Professional Services: $300K

3Q06	4Q06	1Q07	2Q07	3Q07	4Q07	1Q08	2Q08

Deliverables

Stage 1:
- Define & Deploy improved incident and problem classification scheme and associated reports
- Reengineer & implement tightly integrated IM and PM procedures and workflows
- Develop HelpDesk staffing model to meet service expectations (e.g. time on hold)
- Ensure MOM Element Managers use understandable labels and implement changes
- Install and Pilot Peregrine PM module in test
- Implement Password Reset
- Implement KPI reporting
- Next Stage Deliverables

Stage 2:
- Assess Peregrine workflow module end-to-end for ITIL-based improvements; define requirements and implement tool modifications
- Integrate PM Module to new workflow and move to production
- Expand and Implement new KPI reporting metrics for Incident, Problem, and Call Handling
- Staff training
- Move PM module into production environment
- Implement Peregrine BI module

Stage 3:
- Broad rollout of Workflow changes and associated ITG and Business User Training
- Full Automation of QRP and Metric based Management reporting on all ITG Incident and Problem Management
- Evaluate use of other self-help technologies
- Expand HelpDesk access by adding Web Channel

Stage 4:
- Extend ITIL-Based workflow and Peregrine Tool support to all ITG Help Desks and Pilot in other Technology Support Help Desks

Stage 1   **Stage 2**   **Stage 3**   **Stage 4**

These three steps to produce the Initiative Implementation Roadmap vary in duration depending upon the size of the enterprise. However, our experience indicates that all three can be performed for most organizations within a 12 to 14 week timeframe. Figure 3 below is an example of how the rollup of the tracks produces the Initiative Implementation Roadmap to improving service support and delivery.

Figure 3 – Initiative Implementation Roadmap

Projects	3Q06	4Q06	1Q07	2Q07	3Q07	4Q07	1Q08	2Q08
1. Transform Change Management				Track 1				
2. Reengineer Release Management			Track 2					
3. CMDB Deployment				Track 3				
4. Rapid Response & Recovery				Track 4				
5. Service Catalog			Track 5					
6. Security Enhancements				Track 6				
7. Expand Service Desk Scope						Track 7		
8. Deploy Self-Help Technologies							Track 8	
9. Define new SLM Process						Track 9		
10. Establish Capacity Mgmnt				Track 10				
11. Establish Availability Mgmnt						Track 11		
12. Expand Metrics Program							Track 12	

With this approach NAI can develop an Initiative Implementation Roadmap addressing (1) your organizations most critical pain points, (2) a concurrent top-down and grass-roots support model, (3) campaigns for communications, training and awareness, (4) a balance between strategic foundational efforts and Quick Wins, and (5) an emphasis on a metrics program to empirically map your improvements going forward.

The final Roadmap is presented to both Business and IT Management for ratification and adoption of the Initiative built from all the Track plans developed during these first three steps. As in any alignment or continuous improvement initiative, a group with leadership and sustaining capabilities must be established to spearhead an endeavor of this length and complexity. It requires good talent to "get strategic value while delivering Quick Wins".

This report was prepared by the Nouri Associates, Inc. (NAI) as a service to our past, present, and future clients. The author, Coby Dunn is an ITIL certified senior business and systems executives in operations, product development, customer service and support. His current area of focus is mentoring enterprise organizations obtain the maximum benefit from their Service Management improvement campaigns and ITIL initiatives. If you are interested in hearing more about NAI's Implementation Roadmap for Service Management improvement initiatives, feel free to contact the author, Coby Dunn at 415-902-2879, coby.dunn@NouriAssociates.com.