

itSMF®

The IT Service Management Forum

AT YOUR SERVICE

The Official Magazine of the IT Service Management Forum (*itSMF®* International)

Unlocking the World of Service Management



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Inside:

- ITIL® Update - We ask the hard questions
- The adventures of Sue and Bob
- Six Criteria for an Effective CMDB Architecture

From the Editor's Desk

I am very excited to bring you the first edition of itSMF International's global Service Management magazine "At Your Service".

The goal of this publication is to bring the best in Service Management writing from around the globe into your inbox. We have a selection of articles taken from chapter publications along with some exciting offerings written specifically for this global magazine.

When I first began work as Chief Editor for itSMF International the goal was to find innovative writings in the field of Best Practice for Service Management and bring these to a global audience. It has not been an easy job and it has taken a lot longer than I had hoped, but with the publication of this, our first edition of "At Your Service" we have started on a journey that can only get more exciting the further we go. I hope you will jump on and enjoy the ride with us.

This magazine is just the first small step for us. We have some exciting books in the pipeline on topics that we hope will inspire our readers to step outside their comfort zones and explore some new frontiers in Service Management. Take a look at Ian Salvage's musings on Green Service Management on page 3 - a teaser to his book, to be published by itSMF in the northern winter.

Have a read of our article "We Need You" on page 23, this will explain our and the different routes to publication through our own publishing programme and our partnership with The Stationery Office (TSO). There are rewards, both financial and reputational available.

We are always on the lookout for authors who can help us achieve our goal of providing innovation and thought leadership to the ITSM community, so please [email](#) me, or come and speak to me at events, and tell me your ideas.

Our inaugural International White Paper Competition was a great success with our judging panel having a hard job separating the 19 finalists. Ultimately the winner of the award (and an iPad) was the UK's submission of the year winner for 2009, Ian MacDonald, with his paper on End to End Service Reporting. You can download Ian's paper [here](#) and read an excerpt of the paper on page 29.

In our next edition we will have a "Letters to the Editor" section, with a prize for the top contribution. Send your contributions to me [here](#).

I hope you are enlightened and inspired by the articles we are bringing to you in this first edition of "At Your Service", happy reading.

Kirstie Magowan

Chief Editor itSMF International

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Linking Service Management and Environmental Sustainability

Ian Salvage



Think
Green

We already know that providing services that deliver value to customers is fundamental to best practice service management. Now, recognition is growing that we need to add a new value alongside the more traditional financial and social values attributed to services - environmental sustainability.

There are a number of reasons why the need for this new value is increasing in companies. Most likely reasons to be cited are:

- to drive operational efficiency
- to enhance business reputation
- to comply with new legislation
- because of stakeholder pressure.

No matter what the driver, if environmental sustainability is seen as valuable to companies, this suggests a fundamental link between service management and environmental sustainability.

This is a fine concept, but what does it mean in practice? How does an organisation go about not only 'greening' its IT, but also linking service management resources and capabilities to its overarching 'green' strategy? What changes does it need to make to the way it manages its IT currently?

The good news is that the introduction of environmental sustainability into a company's strategy does not result in a complete rethink of all that has gone before in terms of best practice service management. Rather, it requires the placing of a different 'lens' over what already exists. Core processes will not disappear; rather the different 'lens' will require us to broaden our thinking and knowledge to integrate environmental sustainability into what we already know and love. Knowledge will be essential for the transition to a 'greener' approach to managing services, driving change top down *and* bottom up.

A new book written by Ian Salvage, to be published by itSMF in the coming northern winter, starts to answer some of these questions. Currently in review by a panel of experts in the field of sustainability, the book will be the first publication commissioned as a result of our new global publishing initiative- see "We Need You!" later in the magazine.

Asking the Hard Questions

The ITIL® Update



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Rob England (a.k.a. The IT Skeptic) looks into the changes ahead for ITIL and asks the people involved the questions you are asking.

When the idea was first mooted of rewriting ITIL version 2, ITIL was on the rise, emerging from a sleepy backwater of IT. It was growing – hence the interest in a revision – but it was nothing compared to the multi-billion-dollar industry of today.

The Office of Government Commerce (OGC) had a part-timer looking after ITIL and they had only recently outsourced operational publications-related functions to TSO, and certification- and brand-related functions to APMG. The relatively unknown Sharon Taylor was contracted as ITIL Chief Architect to steer the revision. Probably none of them anticipated quite what a wild ride it would turn out to be.

ITIL was well entrenched in Europe before the millennium, but it took off in the USA more recently, finally overcoming the “not invented here” syndrome. The rest of the world lapped it up too. As ITIL V3 was gestating, the ITIL world was exploding.

ITIL was a requirement in more and more job descriptions. It wasn't just about the books any more – there was huge interest in certification.

The user community had changed too, thanks to Web 2.0. ITIL was no longer a one-way flow of best practice information: the feedback from forums and blogs had grown from a murmur to a clamour.

And the IT industry had changed. Ever since Y2K, IT Operations had been emerging from the backroom “goldfish bowl” to lead IT. Operations was the focus of

attention as the keepers of the Services. Service Management was growing into the *raison d'être* of IT. By 2005 it was a cult and by 2010 it was a megastar.

So feel for those involved in creating Version 3. What started out as a mildly challenging project to rewrite a dozen books into five - a boffinish intellectual exercise – soon turned into a storm of competing forces, controversy, big deals, and lots and lots of hype. A crowd of self-appointed experts and critics whipped a vast fan-base into a frenzy of expectation. The five books were not a big-budget undertaking. The authors were not paid huge amounts; the reviewers were all volunteers; and itSMF ran the worldwide launch with volunteers too. But by the time the books hit the street, demand was voracious and interest was at fever pitch.

When finally released, the books were thrown into the mosh-pit, where they were by turns held aloft as the new holy texts of IT or trampled as heresy or – worse still – rubbish.

And it only got worse, not better. The market expected the certification at the same time as the books, though that had never been promised. The job ticket was more important than some books, which most people never properly read anyway – they just pretended. The howls over the wait for certifications only got louder as they came out, one by one: they weren't this and they didn't that and there were too many of those.

For those who had the best intentions of making something better for the profession, especially the volunteers, it must have seemed – some days – like a slap in the face by an ungrateful mob. Eventually something had to be done about the mounting list of

errors – minor and major – that were being reported. A project was announced to review the books, incorporating a mass of fixes, revising the texts, and substantially rewriting one of the five books.

Many readers will know I did more trampling than elevating, more howling than praising. But I'm on record as saying the books are good and useful. They play a large part in keeping my family fed. So I had the same mixed emotions as many others when it was announced that the books were to be revised.

On the one hand we trumpet continual improvement. On the other hand we want ITIL to be a rock, a stable standard in a mad world. The debate over the books and certifications is only now settling down from a screaming roar to a subdued grumbling. We're finally getting our heads around so much that is new, and now we get more change?

I went to find out more. Most of you will have read the official information (see sidebar) so we skipped asking the obvious. We asked the hard questions.

TSO is not only publishing the books, but also has the contract to manage the revision on behalf of OGC, so we started by talking to Janine Eves, OGC Publisher and Contract Manager at TSO.

1. When will the new version of ITIL come out?

The first point to note is that it is not going to be a new version. It will be an update which is designed to:

- Resolve any errors or inconsistencies in the text and diagrams, both in content and presentation
- Improve the publication by addressing issues raised in the change control log, as analyzed and

recommended by the CAB and approved by OGC. These are largely to do with clarity, consistency, correctness and completeness

- Address suggestions for change made by the training community to make ITIL easier to teach
- Review the Service Strategy publication to ensure that the concepts are explained in the clearest, most concise and accessible way possible. There is no notion of simplifying the concepts; rather, improving the exposition of the ideas.

Where new content is introduced, it will be for completeness, to redress an imbalance in the level of detail, or as part of restructuring for consistency.

We anticipate the update to publish in the second half of 2011. [The publication date is subject to the feedback from the two public reviews.]

2. Oops, it is an update not a version right?

Spot on! It is an update as I mentioned in the previous answer.

3. What went wrong with ITIL V3 that we need such an extensive update now? What is in place to make sure we don't have this issue again?

Nothing went wrong, we are committed to the principles of ITIL and a key one of these is the concept of continually reviewing and improving where required (CSI). This update is a direct result of feedback from the community that reads, uses and trains from this guidance. We are endeavouring to improve the guidance based on that feedback from key stakeholders with the end result being guidance that is easier to navigate, read, translate, and to teach. Best Practice

evolves in real life so it follows that the books should evolve, nothing is ever static.

4. Right now there is nothing on the five ITIL books that says “version 3” - people are expected to know. How will people know which are the revised “3.1” books and which are the original “3.0” books? Will it be by the copyright date or a little note in the colophon, or will there be a nice big logo on the cover?

ITIL is ITIL and we are trying to get away from ITIL V2 vs. ITIL V3. By the time the update is published both ITIL V1 and V2 will no longer be in existence and therefore the core books will remain just ITIL. A user will be able to tell the difference between the current publication and the update because the book covers will be slightly different to reflect OGC’s new branding and the copyright statement will reflect the updated status.

5. Was it really necessary to revise the books? We are only just getting over the changes going to version 3. Couldn’t we just stick with what we have?

Since publication we had over 600 changes and comments from the user base plus additional guidance around roles, process flows, inputs and outputs, as well as feedback from the trainers about ease of understanding and ease of adoption. If these books didn’t go through *CSI* we wouldn’t be doing our job properly or listening to the users of the content – which after all are the most important component for making ITIL what it is – a Best Practice Framework.

6. Will I really need to buy a new set of the five core books? None of the concepts are changing and no new concepts coming in, right?

The updated books will have many improvements, which should make them easier to read and to understand, many people may choose to buy the updated edition but there is no requirement to buy the new books. TSO and the OGC are endeavoring to provide a free of charge downloadable ‘Summary of Changes’, which will detail changes to the text where it is possible to report and document them.

7. Is this considered an “update” under the terms of online subscriptions? or will subscribers need to pay a new subscription for the updated books?

The updates to the core text will be available to all of those with online subscriptions; active subscribers will automatically receive the updated text at no additional cost for the lifetime of their current subscription.

8. Why did TSO publish a “Second edition” of the Introduction to the Service Lifecycle in May this year? Couldn’t it wait until the revision?

The title of the publication changed as did the cover artwork, to reflect OGC new branding. Standard Publishing protocol dictates that changes of this nature require a new ISBN and for the publication to be classified as a Second Edition. No other content in this publication changed. The *Introduction to the Service Lifecycle* is included in the update and we plan to publish it at the same time as the five core books.

9. An anonymous comment on my blog indicated that only the title of Introduction to the Service Lifecycle has changed. How would one know what has or hasn’t changed in the book?

This information was distributed online, via LinkedIn, Twitter and is featured on the information about the book in all marketing material. If substantial changes are made to an OGC Core publication, these changes are documented within the change control log at the [best management](#) website. As you rightly say there were no substantial changes to this publication.

10. Will there be more updates to the books after “3.1”?

Firstly this will not be 3.1. This is an update to ITIL. There is a ITIL Change Advisory Board (CAB) set up to monitor the changes that are logged for the ITIL core publications. The CAB reviews the comments placed on the Change Control Log and either accepts or rejects the issue. Accepted issues are discussed with OGC. The decision to update the text has to always be balanced with the frequency of updates against keeping the content up-to-date and Best Practice. When OGC deem it necessary they will look at providing a suitable mandate and scope for those changes to take place. This update will be released four years after the publication of what came to be known as V3.

11. Who decides when a book gets updated? Is there “Change Management” for ITIL, and if so who is the Change Manager?

As mentioned previously, there is an ITIL Change Advisory Board (CAB), made up of eight people representing all key stakeholders. The CAB reviews and advises on user feedback captured via the change control log. Based on the review of these issues OGC

will provide a mandate and scope to update the guidance balancing frequency of change with keeping the content up-to-date.

12. Could it be that Service Strategy is just so smart most of us don’t get it? Will we lose something if you make it simpler?

The update is to ensure that the books relate clearly with one another, anomalies are corrected and that the content is conveyed in a clear and concise manner. The feedback from users is that Service Strategy needed most improvement in this area and as such wording of concepts and how they are explained will change.

ITIL is a living-breathing framework for the implementation of best practice in the service management world. In order for this to be understood and used as it is intended we need to ensure that it is accessible and understandable to all.

13. How can one see which changes have been approved by the CAB to go into the updates?

This is not available at the moment but the intention is to update the change log to show all of the issues that will be covered in the update. This will need to wait towards the end of the project so the change log can be updated accurately.

14. Are there any plans or perhaps intent for an “ITIL 4”, a complete rewrite of the books?

There are no current plans but as previously stated we are keen for ITIL to remain as ITIL (without the version numbers) and therefore it will continue to be updated throughout its lifecycle via controlled and planned updates.

Since the world seems to be at least as passionate about certifications as about the books, we next asked the hard questions of Richard Pharro, CEO of APMG.

1. Will there be any change to syllabus content as a result of the “3.1” update to ITIL?

There were no plans for a major change to the syllabus content. However since the first draft has become available it is clear that there will be the need to update and finesse the syllabus in certain areas.

2. Will ATOs need to change their courseware? They will hardly have got their ROI on the 3.0 content they wrote. Will they get assistance?

Based on the early draft some changes to courseware may be necessary. The exam panel will provide detailed advice to minimize the work required by the ATOs.

3. Is there anything on my certification that says whether it is 3.0 or 3.1? or are they regarded as the same?

We will not be using anything to identify the guidance used in terms of certification. Someone with an ITIL V3 qualification will be treated the same whether they have taken that qualification prior to the update or after the update. The only differentiator will be the date which they gain their certification.

4. Will there be “bridging” certification from 3.0 to 3.1?

The Accreditor has no plans to introduce any bridging certifications.

5. Now the question the majority of practitioners seem to care most about: Won’t “3.0” certifications lose value in the job market compared to “3.1” certifications?

We do not expect version 3 certifications to lose value in the job market. Because we expect the core principles and processes to remain unchanged, a candidates’ understanding of these principles and their application should be the same regardless of when they became certified. Again the big issue will be the date that someone has gained the certification. This is always a balance between someone gaining the certification a while ago and having greater experience applying V3 and someone gaining the certification now with less experience in the application of V3. The benefits of each approach will be down to the employer to determine.

6. What is happening to ITIL product compliance? Will the criteria change? Will vendors need to re-submit products?

There is no intention to change the ITIL software process compliance scheme. However, if there are any process changes in the update these will be reflected in the scheme. Any software currently endorsed will be subject to the vendors normal release strategy and any changes should be accommodated at that stage.

7. How will other small incremental changes to ITIL in future be handled with regard to certification?

Any small changes in the update will be dealt with as part of the continual improvement and review pro-

cess for the syllabuses and examination questions.

So what does this all mean for itSMF? We asked Marianna Billington, itSMF International Director of Publications.

1. Has itSMF had any input from members and/or chapters regarding the ITIL “3.1” Update?

The team of mentors, authors and reviewers who are part of this project are largely made up of members of our community so in short, yes, itSMF members have been integral in the input of this update. The project board has also had representatives from itSMFI on the team as “superusers”. Prior to my appointment this was Paul Martini my predecessor, and now both myself and Rob Stroud have been attendees at the regular update meetings.

2. What is itSMF International’s view on the need for an Update?

The engagement of this project was before my time, however the feedback I have had from the International Board team is that there is a need for more process fluidity and consistency in the lifecycle. This project should address this need.

3. What will be the impact on itSMF? Is this going to cost us money?

The impact on itSMF will vary: depending on the changes there may be a need to update training and examination material which could incur cost.

4. Will itSMF be doing the translations of the Updated books? Will that be on the same terms as the 3.0 translations or will we negotiate a new contract?

I cannot comment on contracts at this stage however I can confirm that five languages have been identified at this stage to translate these updated books into. itSMFI, TSO and Chapters who can assist in translations will be working together on making these available.

5. How does the Update impact itSMF’s own publications (actual and planned)?

itSMF is working on their own portfolio of publications that are likely to be complementary to the update. No impact from this update is considered to be a risk to the pipeline for itSMF Publications.

6. How will itSMF benefit from the Update?

Members of our community have had plenty of feedback and improvement suggestions to offer since the release of ITIL V3. This Update process should benefit the community by taking those improvements suggested and making them available to all. This Update project seems to reflect a CSI process in action.

itSMF International wish to thank Janine, Richard and Marianna for taking time out to answer our questions.

A crowd of people are working to improve ITIL. Many of them don’t get paid to do it, so go easy on them. Others make money out of our ITIL purchases and certifications, (not to mention those who profit from software, training, consulting and complementary books), so make sure you let them know what is good and what is not. Speak up and get involved. Only then can ITIL move forward on its journey of continual improvement.



Read more.....
For the official line on the ITIL Update authorised by OGC:
You will find the original OGC Mandate for Change and the project requirements [here](#)
The ITIL Update: Frequently Asked Questions can be accessed [here](#)
The Scope and Development plan for the ITIL Update is [here](#)
Translations of the FAQ and plan into a number of languages can be found [here](#)

The Adventures of Bob and Sue

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Illustrations by Marisa Petersen
First published by itSMF USA

Chapter 1: A Girl Named Sue.

Introductions and Beginnings

The moonlight flickered and glimmered through the night air, illuminating the shape of a woman, head buried in her crossed arms, leaning over an old, oak desk. On the wall behind her hung a colourful McKnight lithograph side by side with a picture of a collection of punched card tabulating machines. The woman lifted her head. This wasn’t as easy as she’d thought when the legal team had approached her. She opened her laptop, took a deep breath, and read what she’d written so far:

“My name is Sue Zuttlemyer. It all began when I was the IT Services Manager at Lightspeed Egress Distribution Outfit (LEDOut). I always figured that my job is exactly what it sounds – deliver the right services in the right way. Sometimes the ‘IT’ bit worries me. I came up through the business – worked in accounts and as a dispatcher until 2001. So maybe that’s really where this story begins. It was August 6th and I had spent over 60 minutes on the phone with the service desk. A nickel for every time I said ‘That’s OK. I can wait.’ and I’d be in the Bahamas rather than writing this thing. I’d had it. “...I charged into the office of my vice president, Simon Hartsfield, swearing I was going to do things with the (service guy’s) phone that I knew were anatomically impossible. The deafening silence in Simon’s office made me uneasy. I followed his gaze and saw our CIO Bethany sitting behind me. Bethany wore an enigmatic grin and made me an offer I couldn’t refuse. I had a gut feeling that I had somehow been set up. If I had drunk one more espresso I would have realized that the folder on Simon’s desk held all 27 suggestions I had sent him for the service desk. It didn’t matter though. I was now the new service desk manager.

That guy on the phone? Turns out he wasn’t so bad after all: hard working, conscientious. Sometimes even good people are trapped by bad processes. Turns out we had a lot of that and I almost felt badly about what I had wanted to do to him. Go figure. By the time Bethany left I was running the whole service delivery side of IT. I taught the service desk staff about the business, they taught me something about IT. The business loved us and our customers loved the business. Profits were up, year-end bonuses too, and I knew that IT was a part of it. Yeah, life was good.

And life stayed good until Bethany packed up her house and her children and followed her professor husband off to some smart University in Europe. And really I am glad she is happy there, if I keep telling myself that for long enough maybe I will believe it.

We have a new CIO now, Dr. Bob Fosters. He likes to feel in charge but if he says, “call me Chief” one more time... I guess it makes sense that he didn’t focus on the “IO” part since he loves technology much more than information. Actually what he loves most are the new toys and the ideas from all those conferences he goes to. He always comes back so hyped to improve us with the latest new idea he was exposed to at the conference, even if it is often opposite to the one he loved before he went. I think he suffers from Intellectual Immune Deficiency Syndrome (IIDS) so that he gets unquestionably infected with every new idea that comes down the pipe. Why can’t he just get a flu bug he can sleep off in a few days?

itSMF Publishing is planning a meeting of all chapter publishing representatives.
Working with our chapters is essential to the success of our publishing venture.
We are currently talking with industry sponsors who are keen to help us make this happen.
We would urge all chapters to ensure that they have appointed a publishing representative and to confirm their names to our chief editor.
This will ensure that all chapters are kept informed and involved in the future of publishing with itSMF and our partners in Service Management Best Practice publishing.



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Don't get me wrong, Bob's a decent guy in a narrow-minded sort of way. I figure he really is trying to do the right thing. In a CIO, that and two bits will get you a Starbucks cup. Not a cup of Starbucks, just the cup. It would be simpler if Bob weren't so nice, so much easier to tell him he was just plain wrong and ignore him completely. But there you have it, when you have lemons, make lemonade."

Sue lifted her head again and looked out through the window down to the darkened street below. Sirens raced by. The flashing lights reflected off the puddles in the street. The image of the lawyer's face popped back into Sue's mind. She looked down at her computer again and continued.

"You will want to know about how we approach service management. Well, after I had settled into IT in May of 2002, Bethany gave me some books called "IT Infrastructure Library" and she told me to get smart on it. That was a pivotal experience for me and I picked up some good ideas that made sense for us, and even more from the training courses I found on the same thing. But of course not everything works in our situation, not everything is possible and just occasionally we come up some neat ideas of our own that seem better for us. Did we "follow" or "do" ITIL V2? No, well at least not as acolytes nor even as devoted fans but as what I like to think of as sensible professionals. I can't imagine any company in the world following every idea in any book of practices. At least not successfully. But ITIL has been our major source of guidance and we like it.

Bob Gets the V3 bug

Then Dr. Bob went to one of his conferences and heard that the new ITIL V3 would give us 'world class service management'. Being considered a world class leader is important to Dr Bob. Definitely a step up from our view of him being a world class... well, never mind. He's not one to let business sense get in his way so he initiated an expensive three month project to implement ITIL V3. Dr. Bob with his new consultant team treated their ITIL V3 project as if it were some kind of new hardware – take out the old one and replace it with the new. I kept telling myself he meant well although I couldn't help thinking that our main competitor might have steered him our way.

Outsiders come in and tell us what a Change Management process has to look like these days. Dr. Bob's the boss so it happens like he wants it, but I suspect that we are being sold a cure without anyone asking what disease we have.

At least the Emperor had underwear (leastwise he did in the version I read my kids) but Dr. B. was running around buck naked looking for the next flavour of the month at Baskin Robbins. It sounds mean but he actually believed that the letters on the baseball cap the consultants gave him actually stood for A Terrific Manager. I kept asking what problem we were



Working in the kitchen



Back from the latest IT conference with the newest trends

trying to solve but they just chortled. Our previous change management process wasn't perfect, of course, and there were many ways it could be improved, but this was wild. According to Dr. Bob and his V3 militia our configuration management can't be any good because we only have one CMDB, whereas survival in the V3 era rests upon a CMS. And, to no-one's amazement, Bob sees the need for an expensive new tool based approach to this with integrated databases and decision support tools. Dr. Bob is now very proud of how he has transitioned us from being an old fashioned ITIL V2 shop into a forward-looking ITIL V3 one. I thought he was joking when he said it represented a 50% improvement but maybe he's just referring to the increase in the number of process documents on the shelf. To me it feels more like 50% of what we had before, because now Bob just added the theory instead of using it, and took our local adaptation away. It feels like being served flour, eggs and water when you expected waffles – right stuff but not used properly.

He happily talks about his new staff structure – and I have three new manager roles to help me – with a service design, a service transition and a service operations manager in place. Funnily enough the people in those roles, after some frantic learning of terminology on training courses have settled back pretty much into how we worked before, with lots of mutual support and collaboration throughout the building, implementation and running of services. I can't tell Dr. Bob, but we always did those things, we just didn't have the names to call them before and we certainly didn't see them as separate things until Bob started dividing us up into what he told us was our new V3 structure. He thinks we're service geniuses and I guess we are, just not in the way he thinks."

Sue stopped, shook out her arms, rolled her head, stood up, and stared out the window. The rain was falling now. New York at night was aglow with twinkling lights and light reflecting off the water. The flashing lights and the sirens outside the main lobby of work that day came to mind. She

sat down again and typed quickly now, trying to get it done. Her staccato typing began:

"Now don't get me wrong – there are many excellent and novel ideas in V3 that will improve our processes and our way of working. There are new practices that we are enthusiastic to adopt for our environment. When ITIL V3 was announced in 2007 I was quietly pleased. It felt like when I learn my favourite artist (oh, all right, Faith Hill if you simply *must* know) is recording a new album. You know – there will be new songs, maybe new versions of some old ones. But you aren't going to throw out all the old albums, just add new things and new interpretations. And then when I finally got some ITIL V3 – Service Transition first – I found it was just like that. In fact – if we keep the music analogy it felt like ITIL digitally remastered – all the good old stuff still there with added value. All I need to do is get the peace I need to listen to my new ITIL music.

We know that the V3 *ideas* will be a major step upwards. But getting Bob to focus on practices rather than expensive tools and major restructuring is like getting a kid to skip the cake for seconds on spinach.

So what did I do – after all I have to keep the business running while Dr. Bob is getting off on his new ideas and implementing them? Well, I keep smiling pleasantly, trying to understand and support Dr. Bob's endeavours and tell him how he can trust us to implement the details now he has done the big thinking (Bob loves those fancy-dancy bits of modern management jargon – throw enough in and he'll leave you alone to do the actual work eventually.)

Evolution or Design

Actually there was one thing Dr. Bob did say that made me chortle and I had to pretend I had mis-swallowed my Coke Zero. That was when he was explaining to our CEO how he had '*designed our evolution*' from ITIL V2 to V3. At least when I made my excuses and repaired to the restroom, I missed the awful details of him explaining how good his new IT processes are. While I'm pleased he's taking pride in the end results, I think it highlights how he's not entrenched in the realities. Our CEO never has, never will care about the detail of how IT runs – she cares about making money in general and specifically on getting the consignments out in accordance to the contracts with our customers.

The reason I chortled is twofold: First I understand evolution (a distant degree in anthropology - really useful in the distribution business) and you can't plan it. By definition evolution moves without knowing its destination. And secondly, precisely because evolution is what we have actually had to do; in spite of Dr. Bob, not because of him. We took a bit of a step backwards after Bob improved us with his new structure, expensive software and new advisors implementing the books zealously. But there was some good in the things imposed by Dr. Bob and those have survived, because they helped. Other things have drifted away into extinction – not lamented by anyone. (Not even by Bob, because they are still in his process documentation, and that is reality enough to him). That was sort of evolution – with the fittest ideas surviving.

And now we introduce more good new ideas in ITIL V3, adapted to our company, our circumstances, our finances and other restraints. What we do is very much not evolution of course – this is design, like ITIL V3 teaches us to do. It is as far from evolution as timber wolves are from Chihuahuas, our new processes are increasingly and very deliberately bred – from the good and general ideas in V3 – to suit our needs."

Sue stood up again. Walked into the kitchen, poured herself more Zero, and took a deep breath. As she swallowed, she picked up the phone and typed in the phone number on the little memo board attached to the wall next to the refrigerator. The phone rang and rang and then was picked up: "Hello, this is the Office of Wesson, Colt and Smith. How can I help you? ...".

To be continued...



The "evolution" from V2 to V3

Measurement is the Key to Transforming Operation Performance

(Part 1 of 2)

This article appeared in the New Zealand itSMF magazine in 2009, the first of a two-part series exploring the power of measuring your performance and highlighting the most valuable measurements.

Dave Hayes is Programme Manager at Delta Software, New Zealand.

Measurement, metrics, baselines, when it comes to measuring IT Service Management performance it is either put in the too hard basket, not relevant or done rather badly.

This is not because we do not know why we should measure our performance, there are plenty of books and whitepapers written about that. I suspect the main reasons are because we do not know what to measure and we do not know how to get the numbers.

We also know that IT Service Management is about people as much as it is about technology. Get the right people, get them doing the right things (process) and then get them doing them right (measurement)¹.

Having the same people do the same things in the same way does not transform operational performance!

So let's assume you have the right people, if you do not, once you start measuring performance, you will. Let's also assume you are doing the right things by adopting the ITILv3 service lifecycle. By reading this I assume you do not need to be convinced however given my heritage I feel compelled to offer "evidence" that ITILv3 is the right thing to do so here goes: A recent CIO2CIO paper stated that it is impossible to drive greater efficiencies and better business results without the structured approach to operational excellence that the ITILv3 framework emphasises².

The only thing left to transform operational performance is to get your people doing the right things right by measuring their performance at it. So what do we measure? The first thing is to agree the critical success factors for a process and then set the key performance indicators to actually measure the success of the process. The following table provides the answer for a base level or foundation of reporting, part 2 extends this by adding success factors and processes that can be successfully managed once this base level of IT Service Management is under control, for now though this is a good starting point:





Service Strategy	
Critical Success Factors	Key Performance Indicators
Financial Management <ul style="list-style-type: none"> Effective management of IT finances 	1. Variance value of budget vs actual costs 2. Ratio of business to IT Full Time Equivalent (FTEs)
Service Portfolio Management <ul style="list-style-type: none"> effective capture and visibility of service concepts 	1. Increasing number of service concepts logged 2. The percentage of services and their status in the service pipeline

Service Design	
Critical Success Factors	Key Performance Indicators
Service Catalogue Management <ul style="list-style-type: none"> Maintain an accurate Service Catalogue 	1. The number of services and their status in the service catalogue 2. The ratio of operational services to the pipeline and pre-operational statuses
Service Level Management <ul style="list-style-type: none"> Manage customer operational and project needs and priorities 	1. Increasing percentage of satisfied customers 2. Increasing percentage of monthly service level meetings held
IT Service Continuity Management <ul style="list-style-type: none"> IT services can be recovered within an agreed timeframe 	1. Increasing percentage of critical services covered by IT Service Continuity Plans 2. Increasing % of critical services completed annual IT Service Continuity Plan tests 3. Increasing % of IT Service Continuity Plans tested
Information Security Management <ul style="list-style-type: none"> Protect the business from security violations 	1. Decreasing number of incidents related to security issues 2. Percentage of agreed security policies 3. Annual review of security policies performed
Supplier Management <ul style="list-style-type: none"> Protect the business from poor supplier performance. 	1. Increasing % of monthly service level meetings held. 2. Decreasing % of UC target failures and threats

Service Transition	
Critical Success Factors	Key Performance Indicators
Change Management <ul style="list-style-type: none"> Implement changes with urgency and accuracy based on business priorities 	1. Decreasing % of failed changes. 2. Decreasing % of emergency changes



Service Transition	
Configuration Management <ul style="list-style-type: none"> Manage configuration items and configuration item database(s) 	1. Twice yearly audits completed. 2. Decreasing % of exceptions after audits. 3. Increasing ratio of software licenses used vs paid for. 4. Decreasing cost of software licenses per user

Service Operation	
Critical Success Factors	Key Performance Indicators
Access Management <ul style="list-style-type: none"> Providing the right level of access to services to enable staff to do their jobs effectively. 	1. Number of requests for access and their identity status. 2. Increasing % of service requests completed within agreed SLA resolution times
Incident Management <ul style="list-style-type: none"> Maintain Service Quality Resolve incidents within agreed service targets Maintain Customer Satisfaction 	1. Decreasing average resolution time by priority. 2. Increasing % incidents closed by service desk at first point of contact 3. Increasing % incidents closed within agreed SLA response and/or resolve time 4. Number of customer surveys sent and responded to, average satisfaction rating. 5. Reducing % of calls abandoned
Request Fulfillment <ul style="list-style-type: none"> Publication of and access to service requests 	6. Increasing number of services requests that can be requested. 7. Increasing % of service requests that can be submitted via a customer portal

The answer to “how do you get the numbers?” is relatively straightforward – these should all be available via your service management software reporting. The days of half baked reporting from service management software are over. Actions speak louder than words so before beating up your vendor send them your list of reporting requirements (use the table referred to here if you wish) and ask for actual reports with sample data in return.

You may be pleasantly surprised by the response or you may well witness an entire software industry squirming in unison!

Look out for the second installment of Dave’s article in our next edition.

¹ Thanks Rob!

² CIO2CIO Operational Excellence Is Key To Maximising IT Investments. Available [here](#)



Six Criteria for an Effective CMDB

Architecture **Vick Vaishnavi**

What do enterprises as diverse as CARFAX, a large retailer, and an infrastructure services provider have in common?

Each has adopted IT Infrastructure Library® (ITIL®) service management best practices and implemented automated IT management solutions to achieve important business goals. Those goals include minimizing service disruptions, cutting costs, driving IT efficiencies, and facilitating regulatory compliance.

At the heart of each company’s IT management strategy is a configuration management database (CMDB). The CMDB stores all the components of the IT infrastructure as configuration items, maintaining not only detailed data on each configuration item but also data on the relationships among them. The CMDB also maintains management data on the configuration items, including their incident and change histories. By integrating this wealth of data into a central repository, the CMDB offers insight into the cause-effect relationships across management data types.

The CMDB enables integration and automation of processes within and across IT service support, IT operations, and IT asset management. As such, it provides a strong foundation for Business Service Management (BSM), a comprehensive and unified platform for running IT.

The integration provided by the CMDB smoothes workflow across groups and permits automation of end-to-end processes. This can help IT to improve service quality, manage services more efficiently, and achieve continuous compliance.

To provide these high levels of integration and automation, a CMDB must be built on an architecture that meets six important criteria: federation, flexible information model definition, standards compliance, support for built-in policies, autodiscovery, and strong access controls.

About the Author

Vick Vaishnavi is vice president of Worldwide Marketing, Enterprise Service Management, for BMC Software.

Vick is responsible for driving BMC’s global marketing strategy, market development, campaigns, and field operations activities.

Federation

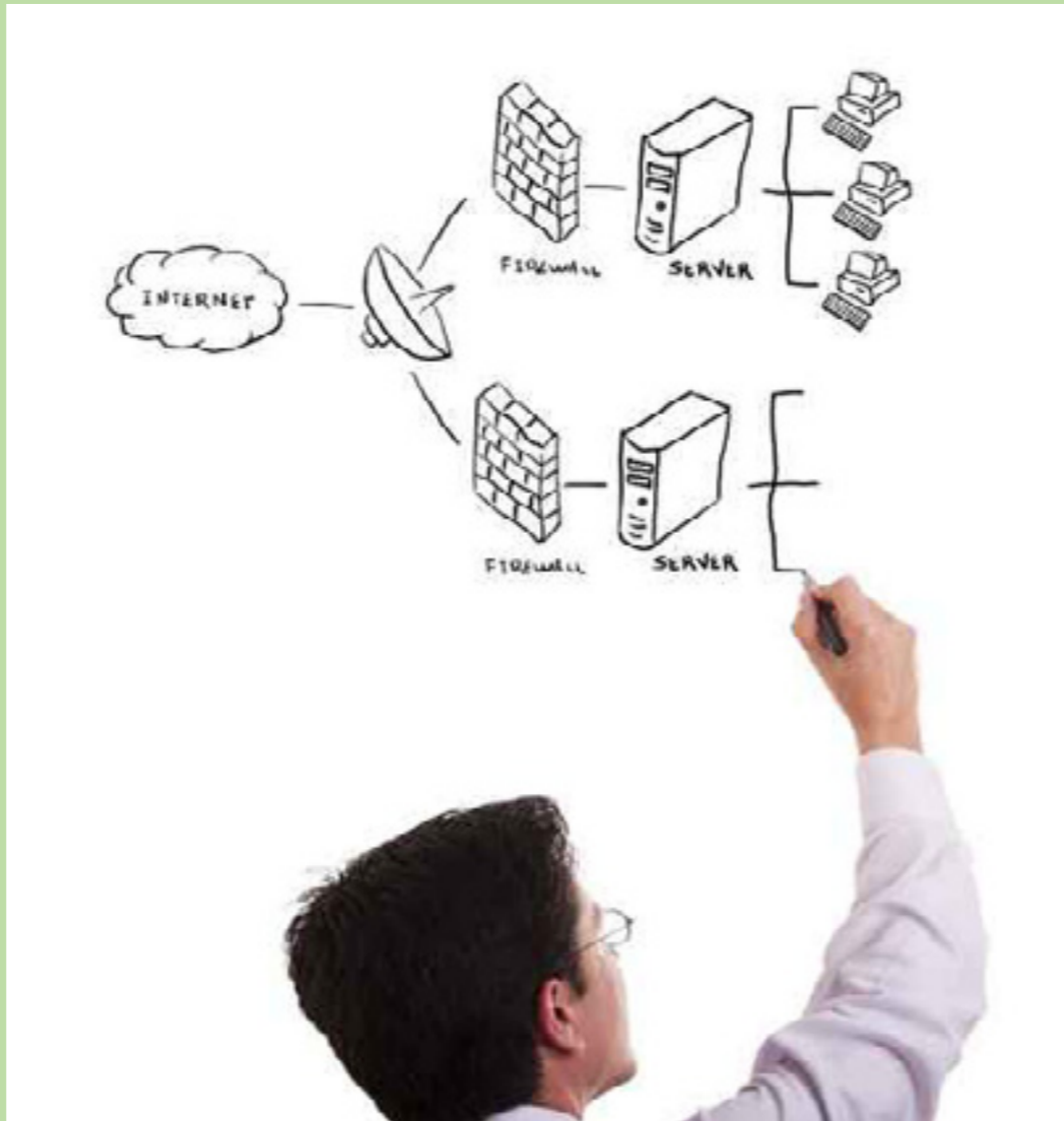
By definition, the CMDB provides a single source of truth about the IT environment, and, as such, it is the central repository for data describing the IT infrastructure. But putting all infrastructure information into a single database is just not feasible. There are too many infrastructure types, elements, types of management data, and varying granularity levels per data type.

The practical approach is to unite a collection of CMDBs and other data stores into what ITIL refers to as a Configuration Management System (CMS). In this approach, individual CMDB instances — that is, data stores that specialize in management functions along various boundaries of IT infrastructure and operations management — collectively contribute to an overall enterprise CMDB.

The ability to unite several data stores requires a federated approach that must be designed into the enterprise CMDB architecture and cannot be added as an afterthought. A CMDB built on a federated architecture provides access to a wide range of information without having to move all the data to or replicate it in the CMDB. For this approach to work, the data stores must segment their contributory slices of the enterprise CMDB along well-defined lines. These lines of delineation must satisfy requirements of data exchange, data integrity, and data access.

At a large retailer of women’s apparel and a variety of items, the CMDB stores fundamental information about the IT environment and provides pointers to other essential and more detailed information in other data stores. Configuration item relationship and management information allows the staff to tie assets to incidents and problems, correlate incidents, and do root-cause analysis. Through federation, the CMDB provides access to information the staff needs to manage asset lifecycles more effectively. This helps to ensure that the company doesn’t continue to pay for support and maintenance on assets that have been retired.

A critical requirement for federation is a strong data reconciliation capability to ensure that data aggregated from multiple sources is accurate



and consistent. Data reconciliation eliminates duplicates so that there is only one configuration item for each entity. Data reconciliation also ensures that data aggregated from multiple sources are attached to the correct configuration items.

Flexible Information Model Definition

Information models for a CMDB can be based on two distinct approaches. The top-down approach takes a desired view of an organization and implements a meta-data model for that view in the CMDB. It follows up by ensuring that all management applications comply with the meta-data model. The bottom-up approach relies on normalizing lower-level data sets to develop a meta-data model.

Most IT organizations opt for the bottom-up approach. That's because it allows existing management data sets to be rolled up into meta-data models easily, reducing implementation effort and speeding time to value. The resulting meta-data models are management function and application agnostic. Consequently, they are easier to manipulate than actual lower level data sets that are tied to specific management functions driven by specific applications. The bottom-up approach also has the advantage of easier acceptance because it can be changes required for top-down approaches. A well-architected CMDB supports both approaches, giving IT the flexibility it needs in implementing a CMDB that best matches its requirements.

Standards Compliance

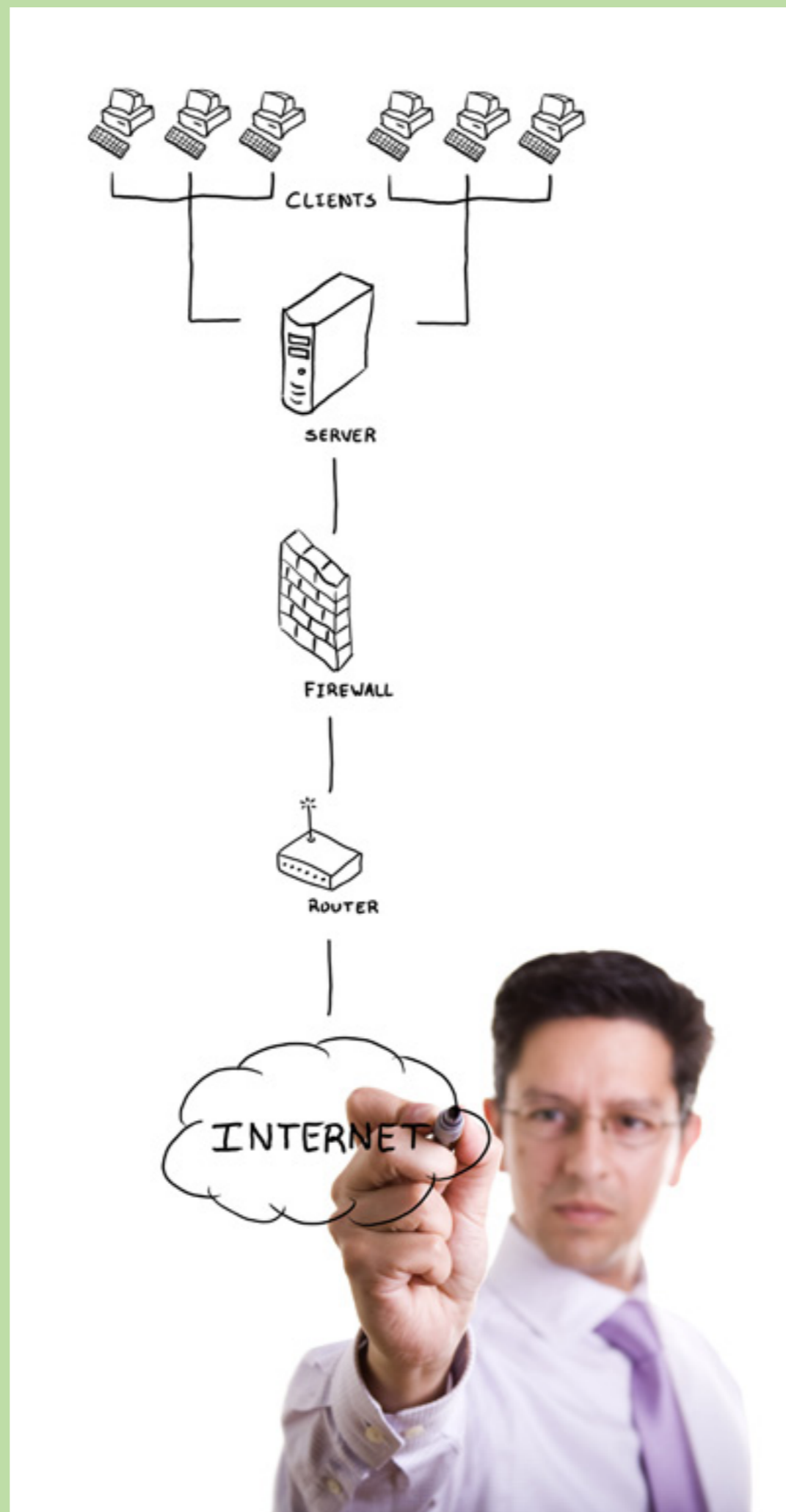
Federation implies multiple CMDB instances and, therefore, multiple data segments. Interoperability among instances and segments is a must. That requires standardized data exchange mechanisms to ensure data integrity, protection, and controlled access. Consequently, the CMDB architecture must support open standards such as XML and Service Oriented Architecture around Web services. Standards support enables interoperability with disparate data stores while ensuring that data sets do not violate the overall integrity of the meta-data definitions that the IT organization has developed for its enterprise CMDB.

Support for Built-in Policies

A well-architected CMDB maintains policies that document the standards used to build, update, enforce, and track continuous compliance for a given service and its supporting components.

A service might encompass an application, middleware, system utilities, databases, network devices, and an operating system. Supporting infrastructure components might include Web servers, database servers, application servers, network devices, and clients. Standards must include details on data sets, such as configuration, installation, performance, and uptime. Policies may be dynamic and may change depending on factors such as time, number of users, and service level agreements (SLAs).

A well-architected CMDB also maintains process models. Because the IT environment typically changes over time, these process models must be dynamic and adapt automatically to those changes. Because it maintains



policies and process models, the CMDB plays a pivotal role in policy-based process automation. This automation greatly speeds process execution while enforcing the use of best-practice processes. An infrastructure services provider that is focused on card-based payment transaction services, electronic payment systems, and international financial information, credits its CMDB with enabling IT to execute all active and proactive processes, such as release, change, and SLA management, at extremely high-quality levels in a very short timeframe and with exceptional performance.

Autodiscovery

The CMDB must automatically discover all the assets in the IT infrastructure, details about them, their physical and logical relationships to each other, and their relationships to the services they support. Federation supports autodiscovery by serving as a means to gain detailed insight into any given infrastructure component.

CARFAX, the leading provider of vehicle history information, relies on automated tools to discover configuration items in the IT environment and feed them into the CMDB. The tools also capture the logical dependency mapping of components, identifying which IT components comprise enterprise applications.

Traditionally, IT has used autodiscovery to rapidly populate inventory information. The latest generation of autodiscovery solutions also periodically scans the IT environment to provide live configuration insight into a given component at different points of time. Live discovery combined with time-series snapshots are vital to any analysis performed on components and the services they support.

Strong Access Controls

In the IT world, unauthorized or undesired access and changes can result in service disruption or downtime. Consequently, security and access controls play an essential role in CMDB design and implementation. Access policies can be used to create profiles and access controls for users and groups. A CMDB must conform to security standards to prevent the implementation of any unauthorized changes to its data set.

These standards can be documented through directories to identify who has access to which data sets and who is authorized to perform actions on which data sets. A CMDB with this built-in, role-based access control supports user authentication through directories to claim access rights.

Foundation for Configuration Automation

A well-architected CMDB can serve as a strong foundation for IT organizations to gain visibility, accountability, and control over their services infrastructure. When combined with discovery and decision support applications, the CMDB provides the foundation for a holistic platform that automates the configuration management of services while ensuring continuous compliance with corporate policies, government regulations, and industry standards and best practices.

Resistance is Futile....or is it?



ABC stands for the Attitude, Behavior & Culture within IT organizations.

“ABC is like an iceberg, much of it hidden beneath the surface and difficult to see, but nevertheless dangerous and capable of inflicting enormous damage to your ITSM initiative, or more importantly to your business.”

As IT becomes increasingly important to business operations more and more IT organizations are turning to ITIL and other such ITSM frameworks to bring IT under control and provide services that deliver business value. ITIL V3 sums up perfectly what we in IT need to deliver “Value to customers in terms of outcomes they want to achieve without the ownership of specific costs and risks.”

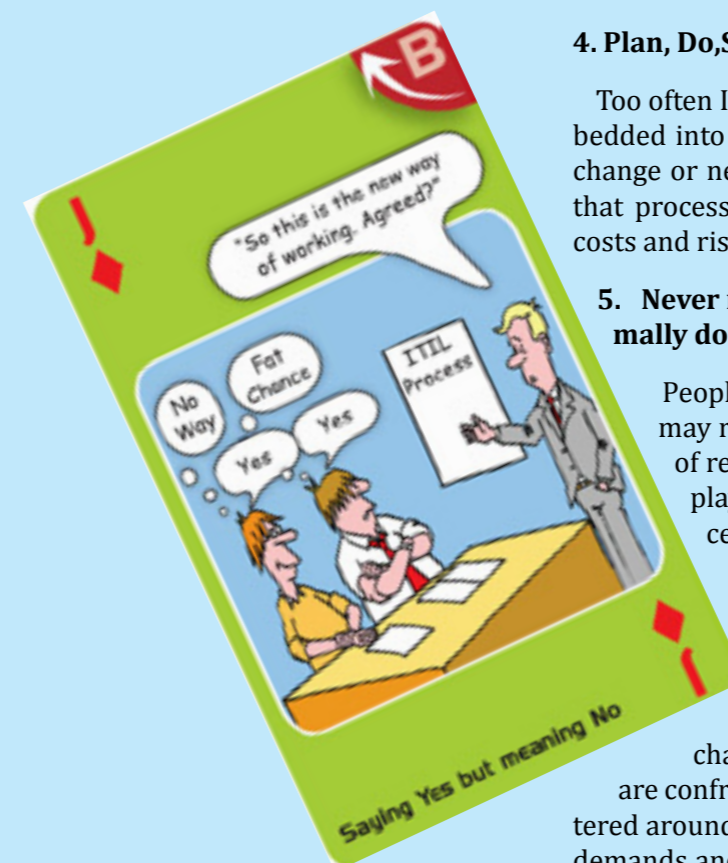
Unfortunately MANY ITSM improvement programs fail. Reports vary, stating that between 70% and 80% fail to deliver value. A Forrester report revealed that 52% fail because of resistance. These failures cause wasted costs and increased business risks. These failures are no longer acceptable.

Despite more than 1,000,000 worldwide ITIL certificates still most initiatives go wrong if we are to believe the figures. I personally have played Apollo 13, our business simulation with more than 1000 different customer organizations and I too can reveal the feedback from the sessions confirms the difficulties organizations are having adopting and deploying best practices. Obviously something is missing in the training and certification approaches being generally offered! If we are to finally remove these wasted costs and risks and deliver real value with the frameworks it is important we identify these types of resistance so that we can learn to address them.

We have surveyed 550 ITIL practitioners who have together been involved in literally 100's of ITSM improvement projects to identify the top types of resistance. We used the ABC of ICT card set and asked the practitioners to choose the top 3 types of resistance they most often encounter. The itSMF in the US also held a series of ABC workshops at local LIGS to also capture feedback.

This article identifies the overall Top 10 types of resistance chosen.

Gamingworks will be conducting a survey of more than 1000 international IT practitioners and users of ITIL to gain a more detailed and accurate set of findings. These will be shared with the whole ITSM community. Hopefully the training companies and consulting companies



will translate the findings into solutions so that we can manage the costs and risks and finally start delivering value.

The Top 10....

1. No management commitment

Managers giving 'lip' service to the importance of ITIL, or managers not 'Walking the talk'. Managers who don't address the issues of 'Saying Yes, but meaning No'. Managers who withhold or withdraw resources. Managers who become frustrated at the lack of results and withdraw commitment. It is clear from the LinkedIn discussions that management commitment needs to be consciously addressed and fed with quick wins and progress to ensure they remain committed. The feedback from the LinkedIn discussions around this subject drove this to the number 1 position. .

2. Saying “Yes”, but meaning “No”

People promise to deliver new procedures or designs and fail to do so, other work is more important. Or in live operation people say they will follow a procedure or update a tool but don't...

3. ITIL is the objective not what it should achieve

Very often we communicate to the organization what will happen but not why. ITIL is the goal not what we want to achieve using it. “Other people are adopting ITIL we should too...”, “We are going to Implement ITIL.....”, “That is what it says in the book!...”. Often ITIL initiatives are too large or too complex and are not <fit for purpose>. People try <Implementing> too much too fast, setting unrealistic ambitions and goals.

4. Plan, Do,Stop.....No continual improvement focus

Too often ITIL projects are simply that! projects. The results are not embedded into a continual improvement cycle to ensure as business needs change or new IT solutions are deployed that ITSM remains aligned and that processes continue to deliver value and protect against escalating costs and risks.

5. Never mind about following procedures just do what we normally do

People do not like to change. If they see no reason or value they may resist. If there is too little management commitment this type of resistance will rapidly grow. This type of resistance can be displayed at all levels including the business and users if they perceive ITIL as a barrier.

6. ITIL Never work here

A general resistance to changing the way people work. A lack of belief that ITIL is necessary or it will make a difference. Often people are not told or convinced of the need to change, or there is a denial that change is necessary. Once people are confronted with the fact that ITIL will happen the resistance is centered around lack of time or resources. The pressure of existing workload demands and perceived lack of staff become even more strained because of ITIL demands, causing increased frustration and resistance.

7. Throwing (ITIL) solutions over the wall and HOPING that people will follow them

Despite the more than 15 years of ITIL, the training and certification of-

ferings and the annual itSMF conferences with the 100's of presentations and cases we still do not know how to adopt and apply ITIL. We still fail to engage and involve people in designing their own processes and procedures. We still think we can Implement or Install ITIL.

8. IT thinks it doesn't need to understand the business to make a business case

A survey using the ABC cards to identify the top ABC within IT organisations reveals number 1 - IT has too little understanding of business impact and priority. Partly this is compounded by the fact that IT is still too internally focused. Often there is a business case or set of metrics and measures however they are generally internally focused and have too little customer or service focus. There is no real relationship with business value, outcomes, costs and risks. IT may argue that the measures do...go and ask the BUSINESS if they agree that these are indeed the measures, value and outcomes they require.

A general resistance to changing the way people work. A lack of belief that ITIL is necessary or it will make a difference. Often people are not told or convinced of the need to change, or there is a denial that change is necessary. Once people are confronted with the fact that ITIL will happen the resistance is centered around lack of time or resources. The pressure of existing workload demands and perceived lack of staff become even more strained because of ITIL demands, causing increased frustration and resistance.

9. Unable to specify the VALUE required by the business

We still do not fully understand the Value and outcomes we need to achieve using ITIL. 70% of ITIL initiatives are still unable to measure or demonstrate value. IT is not seen as an added value partner and does not know how to gain the trust of the business. Whenever we ask at an ITIL conference who knows what the definition of a Service is according to ITIL less than 5% of the hands go up.....although 90% are busy "Implementing" ITIL. The question is - what are they hoping to achieve with ITIL?

10. Everything has the highest priority according to the users

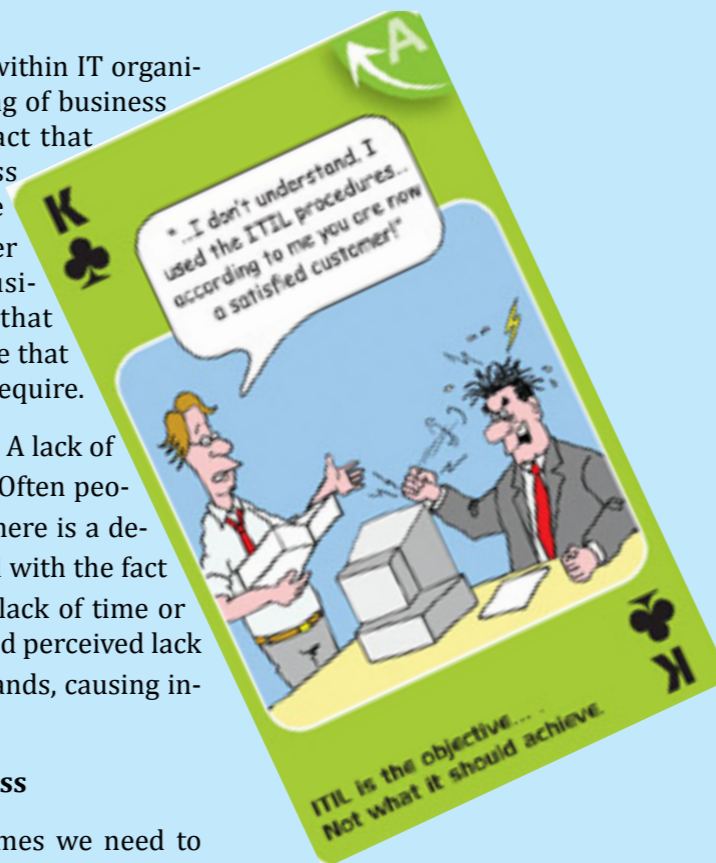
Is it any wonder! If we have spent more than 15 years "playing with ITIL" and most companies do not understand business impact and priority or the value they expect to deliver to the business using ITIL.

What can you do to overcome these types of resistance?.....that will be the subject of Paul's next article.

About the Author

Paul Wilkinson has been working in the IT Industry for more than 25 years fulfilling a wide variety of roles from Computer Operator, to Systems manager to IT Services manager. Paul has been actively involved in ITSM for more than 15 years.

Paul is also co-director and owner of GamingWorks, the company that developed the internationally renowned 'Apollo 13 - an ITSM case experience' ITIL simulation game.



We Need You!

image© Kudryashkai/Fotolia

We started our journey into publishing in 2009 at an international level with a mission - *To aggregate, distribute and publish knowledge in order to provide innovative thought leadership to the itSMF membership. To provide a means for members to share their knowledge and experience with the global ITSM community.*

We wanted to bring together existing chapter portfolios to create a significant collection of service management best practice, one that we could expand with input from the wider community. In addition to supporting chapters that already have a history of publishing, we also wanted to reach out to all of our chapters and help them contribute to a global collection of best practice knowledge. Our first step was to appoint Kirstie Magowan as Chief Editor, closely followed by the creation of an Editorial Advisory Taskforce of subject matter experts.

We cannot achieve our mission without the support of the global community, and there are rewards, both reputational and financial for your participation in this exciting initiative at an individual and a chapter level.

There are a number of ways you can be published with itSMF. In addition to your local chapter's publishing plans, we will be striving over time to commission an additional 12 titles each year. We want to push the boundaries and bring innovation to the community, and we are looking for ideas that will inspire and educate service management professionals, making them think outside the square to bring increased value to the business. We are partnering with our chapters and will bring some of their local publishing initiatives to a wider, global audience.

We also plan to publish collections of whitepapers and the first of these collections is underway with a number of practitioners submitting industry specific papers which will be published in five collections early in 2011. We still need more material for these collections, so if you are interested in contributing a case study to one of these volumes please get in touch with the [Chief Editor](#) and we will be happy to help you get your message out to the community.

As our publication programme progresses we plan to add other media to our collection in the form of audio and video material, so if you have any suggestions to help us get this underway we would be pleased to hear from you.

If you have ITIL based material for publication, the best route to market is via our contract with The Stationery Office (TSO). Through this contract we are able to reuse official ITIL material under TSO's license agreement with the owners of ITIL - OGC.

Under this agreement the author's local chapter will be given the opportunity to help produce and QA the publication, and in recognition, a royalty will be paid to the chapter once the costs of publication have been covered.

TSO and itSMF, in partnership with local chapters, have already successfully published the following titles as a result of this agreement:

- ITIL V3 Foundation Handbook (with itSMF UK)
- ITIL V3 Intermediate Handbooks (with itSMF UK)
- Key Element Guides (with itSMF UK)
- Danish ITIL V3 Foundation Handbook (with itSMF Denmark)
- Japanese ITIL V3 Foundation Handbook (with itSMF Japan)
- Swedish ITIL V3 Foundation Handbook (with itSMF Sweden)
- Arabic ITIL V3 Foundation Handbook (with itSMF Gulf)

If you are interested in sharing your knowledge of service management with the vast network of ITSM professionals around the globe send an [email](#) to our Chief Editor and we will do what we can to get your name in print.

Cloudy With a Chance of Configuration Management

By Joseph Hurley

Is the discipline of configuration management obsolete? How can a process-focused discipline remain relevant when configuration changes happen dynamically? Is cloud-computing the death of the CMDB? There are new challenges, but configuration management has a bright future. In fact, concerns about the future of configuration management actually underscore a weakness in current thought around cloud-computing that can only be addressed by effective configuration management.

There are many configuration management challenges introduced when moving to a cloud-computing environment. They fall into two categories: abstraction and dynamism. By establishing a model that effectively addresses both, we can resolve most objections to maintaining configuration management controls within the cloud.

Abstraction

The cloud is abstracted by design. It provides the ability to add capability without requiring insight to the intricacies of the technology required to support them. A lack of visibility into the stack, however, creates some challenges for configuration management. Below is a review of the two primary methods by which information is abstracted.

Abstraction-by-purpose

A cloud-container is a deployable unit of computing capability offered by IT as a service. While these service “containers” come in a variety of shapes and sizes, they are typically aligned to one of the following categories.

- Infrastructure - "Infrastructure-as-a-Service"
- Application - "Software-as-a-Service"
- Content - "Storage-as-a-Service"

Abstraction-by-environment

The question of environment points to one of the three abstraction layers. Private, Public, and Hybrid. Depending on the selection, infrastructure is increasingly or decreasingly transparent.

Focus on clarity, not transparency

To address abstraction concerns, it is important to remember that complete transparency is not always necessary. The level of transparency required comes from asking, “What value does understanding the infrastructure of the cloud-environment bring me?” In a private cloud, the configuration details are actionable by the internal team, and should be fully controlled as any other environment. In a public cloud, however, the internal team has no access to the underlying infrastructure. Since nothing can be done directly to resolve infrastructure issues, IT should rely on the Cloud provider to manage configurations. In this way, IT can “black-box” the public portions of their cloud and focus instead on those things they can control. The public cloud should be managed based on service requirements through contractual negotiations around Service Level Agreements (SLAs) with the outsourced providers.

To properly document the varying levels of transparency, the configuration manager should create the following classes within the CMDB:

Cloud Types

- Public-“Black-boxed”
- Private-linked to infrastructure

Hybrid would be inferred from container relationships.

Containers

- Content
- Application
- Infrastructure

By providing a management strategy, we can deemphasize the importance of infrastructure abstraction. When properly classified, the cloud elements in the CMDB can continue to provide the necessary support capabilities.

Dynamism

The challenge to maintaining effective configuration management control in cloud-environments is dynamic change. Cloud systems can dynamically respond to increases in consumption by allocating additional capacity. Additionally, automated failover and redundancy are a standard part of cloud-enabling technologies.

Is it possible to establish process-based controls to manage dynamic change? The CMDB is the representation of all cumulative change orders in the environment. How does this work when changes happen every minute? This question, more than any other leads many to believe configuration management is fundamentally not compatible with the cloud-enabled direction of IT.

The simple solution to this problem lies in two elements – process and technology.

Normal vs. Standard

In the normal change process, change is proposed; owner identified; change reviewed, approved and scheduled by the change advisory board (CAB); then released and baselines updated to reflect the changed environment. This process can be time consuming and

cannot scale to meet the dynamic demand of a cloud-environment. Fortunately, a contingency for frequent repetitive updates to the CMDB is already defined in the “Standard Change Process.”

Standard changes are those that occur with enough frequency to warrant special process consideration. Rather than relying the normal process controls, the CAB pre-certifies triggers as well as the process by which a standard change occurs. By putting this framework around change, the CAB establishes guidelines that enable automation. Dynamic cloud changes fit nicely within the boundaries of the standard change process. While the triggers of cloud-based changes are varied, they are finite and definable. Examples include:

- Container request from provisioning system
- Load event in which capacity is added
- Event triggering migration to a non-faulted segment

In each of these cases, the CAB could define conditions and review automation procedures by which changes are executed. Then changes can happen as frequently as necessary and still comply with the configuration management control objectives. The only remaining challenge would be keeping the CMDB baselines updated. To solve that challenge, we turn to technology.

Technology

Baseline updates can be addressed with technology already on-hand. Nearly all enterprise change management and CMDB solutions are web-service enabled. Correspondingly, the most cloud-management solutions leverage automation capabilities that allow integration to service management solutions. Through the combination of these capabilities, the

image© photocreo/Fotolia

cloud-management solution can easily automate the creation of change records and updating of the CMDB.

Beyond the solution

Leveraging a combination of process and technology, we have addressed the concerns for the immediate future of configuration management. More however can be achieved than simply maintaining the status quo. A fundamental issue exists in the cloud-computing paradigm. For all the talk of abstracting technology for greater business benefit - cloud discussions are largely technology-based.

Reviewing the conversation around both the cloud-creation processes and the practical applications thereof reveals an approach suited primarily for technical consumption. The popularity of cloud seems to be moving IT conversations backwards from being business (service) focused towards a technology focus wherein the cloud becomes another silo alongside systems, applications, network, etc.

Fortunately, effective configuration management can help by transforming the cloud conversation back to a service-focused discussion. Consider the reservation systems that serve cloud-environments. They largely focus on the technical attributes of a container. Few systems request input pertaining to business function of the cloud-container. Such questions are critical. Failure to think in these terms is wasting substantial business-alignment opportunity.

Imagine if when requesting an infrastructure container, instead of being asked:

- How much RAM?
- Bandwidth requirements?
- CPUs?

The requestor was asked:

- To what service is this related?
- Is there proprietary content?
- Does this system fall under a compliance control objective?

Further, imagine instead of requesting a container if someone was instead able to request:

- A backup container for the patient information database
- Content distribution related to internal HR policies
- Media content distribution of the investor recording

Upon receiving one of these service-focused requests, would the system have better insight to the type of environment required? The likely risks associated with the usage of this container from a security or audit perspective? Would it change how the requested container was provisioned? Failure to think in business terms leaves information gaps that can have costly outcomes including fines, penalties, loss of certifications, intellectual property loss, and more.

Configuration management can add substantial value to the cloud. Upon establishing a service-focused cloud-management system that draws container-models from the CMDB, it becomes simple to enable automated validation. Approving a container request by a user's role is simple; ensuring that a container is used in a way consistent with the best-practices of the business can be a challenge. A cloud-strategy closely aligned with service management enables a single definition of the service control state inclusive of purpose that can be managed within the CMDB. This way, the cloud moves well beyond providing faster more reliable access to infrastructure and becomes a framework for delivering continual alignment to the evolving needs of the business. Configuration management is not obsolete. Instead, as proliferation of the cloud continues, the configuration manager will enable the adoption of processes and alignment of technology to help IT to achieve its next quantum leap in value.

About the Author

Joseph Hurley has over 16 years experience in IT. He has spent the last 11 years focused primarily on the areas of service management and asset management. A software developer by training, he has worked closely with a wide variety of companies ranging from small startups to the Fortune 500. He operates ITBPL.org, a website devoted to expanding industry exposure to IT Best Practices. He has authored many whitepapers, presented at itSMF events, holds certifications in ITIL and ITAM, and is currently a Director of Technical Sales for CA, Inc.

The full version of this paper was a finalist in the 2010 itSMF Global whitepaper competition

Your Path to Professional Recognition in Service Management

At last year's itSMF USA Fusion event in Dallas, Texas the Professional Recognition for IT Service Management (priSM) scheme was announced.

priSM® offers IT Service Management professionals a vehicle to give professional credibility to their qualifications, experience and ongoing professional development. With multiple credential levels, the priSM scheme gives all ITSM professionals the chance to gain membership and progress through the ranks.

The priSM credential levels include:

- Student in Service Management (**SSM_{CM}**)
- Associate in Service Management (**ASM_{CM}**)
- Professional in Service Management (**PSM_{CM}**)
- Distinguished Professional in Service Management (**DPSM_{CM}**)
- Fellow in Service Management (**FSM_{CM}**)

priSM credentials confirm a practitioner's dedication to, and proficiency in, Service Management. To attain a credential level, the educational and professional experience requirements established by the priSM Institute_{CM} must be met. This, and additional information, will be taken into account to demonstrate each applicant's level of Service Management education, experience and knowledge to priSM auditors.

Earning the priSM credential provides distinction and recognition in a growing community of Service Management practitioners. A priSM credential also increases one's visibility within their organization and on a global level.

In order to maintain the credential, ongoing professional commitment to the field of Service Management is required and met by satisfying the priSM Continuing Professional Development (CPD) program requirements and through annual credential renewal.

priSM is a major step towards the maturity of the ITSM industry. This program offers a valid, objective and consistent, global understanding that can be a valuable tool to those in search of the best ITSM professionals, while offering our members a career path to meet personal growth aspirations – no matter where they are today.

David Cannon, FSM
Chair, itSMF International

Now it has been a year since priSM was announced in Dallas, we thought it was time to catch up on the progress that has been made in the past 12 months so we asked some questions of Dr Suzanne van Hove, priSM Fellow (FSM) and the priSM Institute project manager.

1. Now that the priSM program has been going for almost a year, can you tell us what the response has been?

priSM has been 'live' since February, 2010 and as with any new initiative, there has been lots of inquiry, discussion, growth and education about the scheme. I've never really appreciated the effort required to create a national communication plan. Overall, the response has been very positive – but with a 'wait and see' suspicion. There have been professionals quick to sign up and others, wanting to apply but due to economic reasons, being a bit more conservative in their discretionary funds. There is tremendous work still to be done – continued communication will drive this program to further success.

2. How many people now have their qualifications and experience recognised with priSM?

There are currently over 50 credential holders with many applications in the current pipeline. Fusion10 – itSMF USA's national convention, will see much activity around new applications and credential holders earning the necessary annual Continual Professional Development credits.

3. When is the priSM pilot phase in the USA over? When can we expect to see the program available internationally?

At this time, discussions are underway with several chapters/regions – the Nordic region, Australia, UK, and other chapters have communicated inter-

est. Right now, **anyone** can apply for the credential through itSMF USA – all one needs to do is to be a member in good standing of their home chapter, contact itSMF USA for reciprocity and then complete the application process. As the regional priSM Institutes are deployed, credential holder information will be transferred to the appropriate Regional Institute (e.g., one that includes the credential holder’s home chapter). The global deployment is dependent on the establishment of the global entity – the structure has been defined but the legal requirements have not yet been completed.

4. Where will the program be expanded to first? Do you have a timeline for availability outside the US by region or country?

We would like to control the expansion to ensure the scheme is solidly implemented so we are moving slowly to other regions. Again, the global entity must be legally established before creating the supporting structure. We are hoping that we can move forward with at least one other chapter/region by the end of the year.

5. If professionals outside the USA want to gain priSM credentials, can they do this before the pilot is over, or do they have to wait?

We welcome all to the priSM scheme – one just needs to be a member in good standing with their itSMF Chapter, apply for reciprocity with the itSMF USA Chapter and then complete the priSM application process. [Contact us](#) for more information and assistance.

6. Who administers the scheme? Will the administration remain in a central place once the scheme is international?

The administration of the scheme will be managed within Global priSM Institute, which is a legal entity of itSMF International. This Institute will be ‘governed’ by nominated representatives of Chapters who have credential holders. There are five members (President, Vice-President, Credential Services Director, Registration Services Director and Professional Development Director). There will be an Executive Secretary who will manage the administration. Additionally, there will be Steering Committee, again, with equal representation from Chapters who have credential holders. This committee’s responsibility is to guide the development and

operation of the Institute. The Global priSM Institute will be supported by three Regional priSM Institutes (think “Chapters”) that will be doing the ‘heavy lifting’ for the program – reviewing applications, CPD activities, etc...; all under the guidance and authority of the Global priSM Institute.

7. Are you seeing recognition of priSM from employers?

In the USA, we are starting to see employers include the priSM credential in their job postings. We are working on a program to further promote this activity.

8. How have you been promoting priSM outside itSMF?

Plans are in place to create synergies between the complementary framework conferences to create awareness and support for the scheme. The priSM Institute in the USA is creating plans to begin discussions around priSM and other complementary Service Management frameworks.

“As organizations continue to adopt service management practices, it will become increasingly important to have a valid and meaningful credential that the industry can rely upon. priSM provides that mechanism. One of the most exciting benefits of priSM is that it is a program which may be utilized by other itSMF Chapters globally. That effectively expands the program into a recognized credential for service management professionals worldwide.”

Jay Stuart, DPSM
President, itSMF USA

For More Information:

To find out more of what priSM can offer you as an ITSM professional you can head along to the [priSM website](#) where you will find some informative interviews along with articles explaining the detailed workings of the scheme.

You will find all the information and forms you need to apply for your priSM credentials [here](#). There is also information telling you how you can transfer your ISM membership to priSM.

If you have any further questions you can send an [email](#) and the priSM team will answer your queries as quickly as possible.

A Simple, Low Cost But Innovative Approach to End-to-End Service Reporting

(Winner of the itSMF International Whitepaper Competition for 2010)

By Ian MacDonald of the Co-operative Financial Services

Note: this passage is an edited excerpt from the complete project description and white paper submitted by Ian MacDonald for the inaugural itSMF Global Whitepaper competition. This paper was also the winner of the itSMF UK submission competition in 2009.

In late 2007 the Co-operative Financial Services scheduled an annual review of our Service Level Management (SLM) process to identify potential areas of improvement as input into a Process Improvement Plan. To ensure we focused on the right improvements, we engaged with our business customers to gain an insight into what they viewed as the underlying issues and opportunities.

A key output from the SLM process is of course IT service level reporting and what emerged as a common theme from our business customers related to the quality and relevance of this reporting. The IT organisation had for many years measured and reported on ‘availability’, but typically these measures concentrated on component availability and were somewhat divorced from the business and user view.

As a result of this feedback we worked together with some key customers to deliver a simple, low-cost but innovative solution to the ‘classic’ problem of IT reporting failing to reflect the customer experience of the IT service provided. This has allowed us to transform our IT service reporting deliverables.

This article explains the approach we took to provide new service measures that reflect the customer experience of the end-to-end service provided without the need to invest in complex and costly monitoring and reporting tools.

Vision and goal

What we measure and report becomes the single point of truth, transforming the stance of ‘We think it’s good, why do you feel it’s bad?’ to one that positively encourages a collaborative and partnership approach to Continual Service Improvement.

Figure 1: The shared vision agreed with key customers for the service reporting improvement initiative

This ‘shared’ vision not only describes the outcomes wanted but importantly shows that the success of this transformation change required a strong partnership of both sides.

Situation appraisal - the customer perspective on IT service reporting

The key issues relating to our IT service reporting approach as it stood and the business perception that this fuelled is best summarised as follows:

Key issues

- Users were unable to associate their experience of the end-end service with the IT service reporting provided
- Business impacts were not accurately reflected (and perceived as not recognised)
- Reporting provided limited value in driving the right service debates and stimulating Continual Service Improvement (CSI)
- Reporting was IT-centric and component-based.

Business perception

- Business mistrusted IT and believed we were ‘hiding’ behind our measures
- IT did not understand the business and the impact IT failures had on staff and customers
- IT’s behaviour was driven by trying to achieve IT targets that were disconnected from the customer experience.

The challenge of providing end-to-end service reporting

Technology

Today within the IT marketplace there are many systems management products that can provide both real-time monitoring and service-level reporting for IT services from the end-to-end perspective.

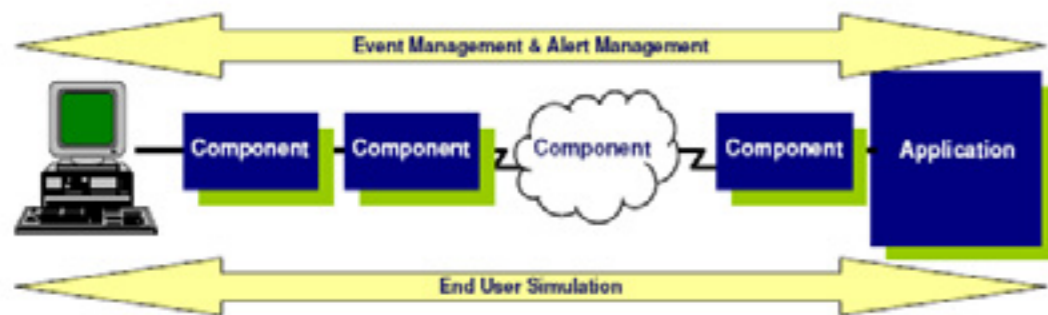


Figure 3: Illustration of technology approaches to monitoring the end-to-end infrastructure

A number of these products can also provide a very accurate view of the customer experience by simulating and repeating an end-user transaction and then monitoring the outcome of the transaction in terms of a functional acknowledgement of its completion and its performance.

However, in reality these technology solutions are often complex and costly to exploit and their success is dependent on robust Change and Configuration Management and involves continual maintenance of the underlying event management logic necessary to ensure accuracy.

Solution overview

New service measures

Two new service measures were devised and integrated into a monthly service scorecard summary report. These measures provide an easy to understand, common and shared view of the end-to-end service provided:

Service Performance Indicator (SPI)

Provides a monthly single numeric ‘score’ for the IT service in the reporting period. This score is given a RAG status to indicate the overall quality of service at a high level.

Trouble Free Days

Each business processing day is given a RAG status. A ‘Trouble Free Day’ is where no incidents have occurred that impact service.

Core components

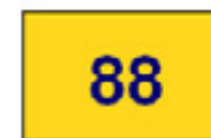
The ‘cornerstone’ of the reporting solution and the basis for how the above service measures are derived is the set of incident records raised against each service. To provide the additional intelligence required to drive calculations and determine the new service measurements we developed a Business Impact Matrix which is underpinned by a ‘scoring engine’.

These tools allow us to assess each incident in terms of impact and duration, which drives a scoring mechanism to deliver the monthly SPI score. Each business processing day for each Business SLA is updated to denote a ‘Trouble Free Day’ (green status) or, dependent on incident impact, an amber or red status.

Business Impact Matrix (and Scoring Engine)

Business Impact	Rating	Agreed Recovery Time	Incident SLA	Incident breach
Call Centre agents unable to service Customers	High	30mins	2hrs	> 2hrs
Penalty Points		2	4	8

The Service Performance Indicator



‘Trouble Free Days’ and the Service Calendar view

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Download the full version of this white paper to read about the:

- Implementation Approach
- Lessons Learned
- Benefits
- Measures of Success



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What's On

October 7-8, 2010

itSMF Finland Annual Conference - Mind the Gap - Espoo



October 13, 2010

itSMF Thailand Annual Conference - Bangkok



October 16, 2010

itSMF International AGM and Chapter meeting - Kuala Lumpur, Malaysia

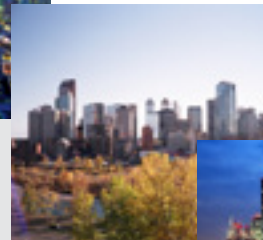


October 18, 2010

itSMF Malaysia Annual Conference - Kuala Lumpur

October 18, 2010

itSMF Canada Professional Development Days Road Show - Calgary



October 20, 2010

itSMF Singapore Annual Conference, Asian Civilisation Museum



October 21, 2010

itSMF Canada Professional Development Days Road Show - Toronto



October 26, 2010

itSMF Canada Professional Development Days Road Show - Ottawa



October 26, 2010

itSMF Netherlands Annual Conference, Nieuwegein



October 28, 2010

itSMF Canada Professional Development Days Road Show - Montreal



November 2-4, 2010

itSMF Denmark 2010 Fall Conference - Odense



November 7-9, 2010

itSMF UK Annual Conference - London



November 11, 2010

itSMF Italy Annual Conference - Milan



November 15-16, 2010

itSMF Spain Annual Conference, Madrid

