

Your Place | Your Pace | Your Progress

Service Strategy

- Determine Perspective ✓
- Form a Position ✓
- Craft a Plan ✓
- Adopt Patterns of Action ✓

Key Principles

- Service Lifecycle
- Value: Utility and warranty
- Service Assets: Resources and capabilities
- Systems, processes, roles, units and functions
- Service provider types
- Value networks

Strategy Generation

- Define the market
- Develop the offerings
- Develop strategic assets
- Prepare for execution

Service Portfolio Management

- Define
- Analyze
- Approve
- Charter

Risk Management

- Analyze risk
- Manage risk

Demand Management

- Analyze and codify Patterns of Business Activity (PBA)
- Match User Profiles (UP)
- Develop service packages
- Define Service Level Packages

Financial Management

- Value services
- Model demand
- Optimize service portfolio
- Optimize service provisioning
- Plan
- Analyze service investments
- Account
- Comply
- Analyze Variable Cost Dynamics (VCD)

Key Documents

- Service objectives, strategies, policies and plans
- Service definition, classification and visualization
- Service models
- Option space
- Business Impact Analysis (BIA)
- Financial plan
- Business case
- Patterns of Business Activity (PBA)
- User Profiles (UP)
- Service packages
- Service Level Packages (SLP)

Service Design

- Collect requirements ✓
- Analyze ✓
- Design ✓
- Evaluate ✓
- Procure and/or develop ✓

Key Principles

- Five design aspects
 - Service portfolio design
 - Definition of requirements and design of service solutions
 - Technology and architectural design
 - Process design
 - Measurement design
- Service oriented architecture
- Business service management
- Service design models
- People, Processes, Products / Technology and Partners [the 4 Ps]

Capacity Management [Business, service and component]

- Review current capacity
- Improve capacity
- Assess, agree and document requirements
- Plan new capacity

Information Security Management

- Produce and maintain information security policy
- Implement security policy
- Assess and classify information assets
- Implement and improve security controls
- Monitor and manage security breaches
- Reduce security breaches
- Perform reviews, audits and penetration tests

Service Catalogue Management

- Agree service definition
- Agree contents
- Produce and maintain service catalogue
- Interface with stakeholders

Service Level Management

- Determine requirements and agree SLAs
- Monitor and report
- Improve customer satisfaction
- Conduct service reviews
- Revise SLAs and underpinning agreements
- Develop relationships
- Maintain templates

Supplier Management

- Evaluate
- Establish
- Manage performance
- Renew and/or terminate
- Categorize suppliers and maintain SCD

Availability Management [Reactive and proactive]

- Monitor, measure, analyze, report and review
- Investigate and instigate
- Assess and manage risk
- Implement countermeasures
- Plan and design
- Review and test

Key Documents

- Service design policies and plans
- Service Acceptance Criteria (SAC) and Service Level Requirements (SLR)
- Service Design Package (SDP)
- Solution designs
- Architectures and standards
- Service level policy, plans and reports
- Service Level Agreements (SLA) and Operational Level Agreements (OLA)
- Service Improvement Plan (SIP)
- Availability policy, plans, design criteria, risk analysis and reports and reports
- Capacity policy, plans, forecasts and reports
- Business and IT service continuity policy, strategy, plans, risk and business impact analysis and reports
- Business and information security policy, strategy, plans, risk analysis, classification, controls and reports
- Supplier and contracts policy, strategy, plans and reports

Service Transition

- Plan and prepare ✓
- Build and test ✓
- Testing and pilots ✓
- Transfer, deploy, retire ✓
- Review and close ✓

Key Principles

- Policies for service transition
- Managing communications and commitment
- Managing organization and stakeholder change
- Stakeholder management
- Big bang vs. phased
- Push vs. pull
- Automation vs. manual
- Service V model
- Data-Information-Knowledge-Wisdom

Evaluation Management

- Plan evaluation
- Evaluate predicted performance
- Evaluate actual performance

Service Asset and Configuration Management

- Management and planning
- Configuration identification
- Configuration control
- Status accounting and reporting
- Verification and audit

Service Validation and Testing Management

- Management validation and test
- Plan and design tests
- Verify test plan and test designs
- Prepare test environment
- Perform tests
- Evaluate exit criteria and report
- Clean up test environments and close

Key Documents

- Service transition policies and plans
- Service Design Package (SDP)
- Service Acceptance Criteria (SAC)
- Change and configuration management policy, plans and reports
- Change schedule
- CAB agenda and minutes
- Configuration model
- Configuration baselines and status reports
- Release policy, plans, packages and documentation
- Service quality policy, risk policy, test strategy, test models, test plans and test reports
- Build plans and documentation
- Evaluation plans and reports
- Deployment plans and reports
- Transition closure report
- Knowledge management strategy

Release and Deployment Management

- Plan deployment of release package
- Prepare for build test and deployment
- Build and test
- Test service and conduct pilot
- Plan and prepare for pilot
- Perform and transfer, deployment, and retirement
- Verify deployment
- Support early life
- Review and close deployment

Change Management

- Create and record Request For Change (RFC)
- Review RFC
- Assess and evaluate change
- Authorize change
- Plan updates
- Coordinate change implementation
- Review and close change

Transition Planning and Support

- Define transition strategy
- Prepare for service transition
- Plan and coordinate service transition
- Advice
- Provide administration
- Monitor and report progress

Service Knowledge Management

- Define knowledge management strategy
- Transfer knowledge
- Manage data and information
- Maintenance of Knowledge Items (KIs)
- Maintain Service Knowledge Management System (SKMS)

Service Operation

- Monitor and control ✓
- Manage activities ✓
- Generate metrics ✓
- Provide reports ✓

Key Principles

- IT services vs. technology components
- Stability vs. responsiveness
- Quality vs. cost
- Reactive vs. proactive
- Organizational structures
- Operational health
- Communication
- Documentation

Event Management

- Generate event notification
- Detect event
- Filter event
- Categorize event
- Correlate events
- Trigger response
- Select response
- Review actions
- Close event

Request Fulfillment

- Select and input details of service request
- Approve service request
- Fulfill service request
- Close service request

Incident Management

- Identify incident
- Log incident
- Categorize incident
- Prioritize incident
- Carry out initial diagnosis
- Escalate incident
- Investigate and diagnose incident
- Resolve and recover incident
- Close incident

Access Management

- Request access
- Verify request
- Provide rights
- Monitor identity status and maintain users, roles and groups
- Log and track access
- Remove or restrict rights
- Maintain directories

Problem Management

- Detect problem
- Log problem
- Categorize problem
- Prioritize problem
- Investigate and diagnose problem
- Find a workaround
- Raise a known error
- Resolve problem
- Close problem
- Review major problem

Functions

- Service Desk
 - Single point of contact
 - Local, Central, Virtual, Follow the Sun
- IT Operations Management
 - IT operations control
 - Console management
 - Job scheduling
 - Backup and restore
 - Print and output
 - Facilities management
- Technical Management
 - Manage technical knowledge
 - Plan, implement and maintain stable infrastructure
- Applications Management
 - Manage applications knowledge
 - Ensure applications are appropriately designed, resilient and effective
 - Provide support resource

Key Documents

- Service operation policies and plans
- Event management policy, plans and reports
- Incident management policy, plans and reports
- Incident models
- Major incident procedure
- Request fulfillment policy, plans and reports
- Problem management policy, plans and reports
- Problem models
- Process manuals
- Technical documentation
- Operational procedures and instructions
- Functional documentation
- User guides

Continual Service Improvement

- Plan ✓
- Do ✓
- Check ✓
- Act ✓

Key Principles

- Organizational change
- Service measurement
- Assessments and benchmarking
- Governance
- Deming cycle
- CSI model

7-Step Improvement Process

- Define what you should measure
- Define what you can measure
- Gather data
- Process data
- Analyze data
- Present and use information
- Implement corrective action

Service Measurement

- Develop a service measurement framework
- Define what to measure
- Set targets
- Create a measurement framework grid
- Interpret and use metrics
- Create scorecards and reports

Service Reporting

- Define reporting policies and rules
- Collate
- Translate and apply
- Publish

Key Documents

- Continual Service Improvement policies and plans
- Corporate and IT vision, mission, goals and objectives
- Critical Success Factors (CSF)
- Key Performance Indicators (KPI) and metrics
- Service level targets
- Balanced scorecard
- SWOT analysis
- Service Improvement Plans (SIP)
- Business case
- Reporting policies and rules
- Reports

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