

DELIVERING ITSM FOR BUSINESS MATURITY

A Practical Framework

This page intentionally left blank

DELIVERING ITSM FOR BUSINESS MATURITY

A Practical Framework

BY

BEVERLY WEED-SCHERTZER



United Kingdom – North America – Japan – India
Malaysia – China

Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2019

Copyright © 2019, Emerald Publishing Limited.

Reprints and permissions service

Contact: permissions@emeraldinsight.com

No part of this book may be reproduced, stored in a retrieval system, transmitted in any form or by any means electronic, mechanical, photocopying, recording or otherwise without either the prior written permission of the publisher or a licence permitting restricted copying issued in the UK by The Copyright Licensing Agency and in the USA by The Copyright Clearance Center. Any opinions expressed in the chapters are those of the authors. Whilst Emerald makes every effort to ensure the quality and accuracy of its content, Emerald makes no representation implied or otherwise, as to the chapters' suitability and application and disclaims any warranties, express or implied, to their use.

British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-78973-254-2 (Paperback)

ISBN: 978-1-78973-251-1 (E-ISBN)

ISBN: 978-1-78973-253-5 (Epub)



ISOQAR certified
Management System,
awarded to Emerald
for adherence to
Environmental
standard
ISO 14001:2004.

Certificate Number 1985
ISO 14001



INVESTOR IN PEOPLE

CONTENTS

<i>List of Figures and Tables</i>	<i>vii</i>
<i>About the Author</i>	<i>ix</i>
<i>Preface</i>	<i>xi</i>
<i>Acknowledgments</i>	<i>xv</i>
Introduction	1
1. The Authentic Service Progression (TASP)	5
Value Visibility	12
Value Flow Process	17
The Improvement Movement	25
The Personalities of Improvement Movement	39
Organize Vital Processes	42
2. ITSM Fundamentals	53
ITSM – Turning Theory into Reality	54
Transforming IT to a Sales Organization	60
Is the Organization Ready for ITSM?	65
Choosing an ITSM Framework	70
Visualize the Future	76
ITSM Intention Outline	83
A Business Case	90
IT and Finance	95

3.	ITSM Culture	101
	Know Your Ecosystem	104
	The Ecosystem Footprint	107
	Roles in the Business Ecosystem	111
	ITSM is a Culture in Itself	122
4.	ITSM Connected	131
	Communication Channels	132
	ITSM Business Model	135
	ITSM Kick Off	144
	Why ITSM Fails	146
	Steering in the Same Direction and Managing Different Priorities	148
	ITSM Wellness Assessment	153
	ITSM Wellness Assessment Questions	153
	ITSM Business Maturity Metrics (I-BMM)	159
	In Summary	160
	Appendix 1. Metrics for Vital ITSM Processes	163
	Appendix 2. Example Job Mapping to ITSM Roles	167
	Appendix 3. Acronyms	171
	Appendix 4. ITSM Business Maturity Metrics (I-BMM)	173
	<i>Index</i>	177

LIST OF FIGURES AND TABLES

Figures

Fig. 1.	Value Process Flow	8
Fig. 2.	Improvement Movement	23
Fig. 3.	Practical ITSM Model	76
Fig. 4.	Business Ecosystem	105
Fig. 5.	The Four Limbs of Practical ITSM	132
Fig. 6.	Integrated ITSM Business Model	138
Fig. 7.	Authentic Service Progression Value Cycle	161

Tables

Table 1.	Improvement Plan Outline	32
Table 2.	Identify Your Personality Type	40
Table 3.	MI Layers	56
Table 4.	Example – Business Function to IT Service Mapping	66
Table A1.	Example Job Mapping to ITSM Roles	167

This page intentionally left blank

ABOUT THE AUTHOR

Beverly Weed-Schertzer is a high-performing Business Technology Leader specializing in Information Technology Service Management (ITSM), IT Governance, ITSM Process Design and Optimization, Service Operational Excellence, Service Desk Optimization, Organizational Transformation, and Quality Assurance. She has a knack for integrating technology with business to perform as a team. For more than 25 years, Beverly has led operational and strategy teams for service excellence and business maturity.

Beverly's career in IT started in Service Operations and she considers it her home in IT. She has a passion and flare for the industry and works with IT professionals to better their environments and position their units to be a strategic force in their organizations.

Beverly is the creator of The Art of Practicing Yoga in ITSM[®] and leads Executive ITSM Consultancy at edifyIT, LLC, a company she founded in 2009. She has delivered a wide spectrum of ITSM consultancy services for businesses. She demonstrates compelling ITSM understanding, knowledge, and abilities.

Beverly is a qualified master in ITSM holding certifications in ITIL V2, and V3, delivering successful real-world adoptions in service management across the business. She is experienced in ISO 9000/9001 and ISO 20000, CoBIT[®], GxP, and Lean Six Sigma[®].

This page intentionally left blank

PREFACE

To begin, let's explore what Information Technology Service Management (ITSM) is. To put it simply, ITSM functions as a disciplinarian for technology providers. Service Management practices have been around for decades but they weren't formally carried out with Information Technology (IT) providers. They were mostly used by Call Centers or any customer-facing role or function in the business. Service Management's primary focus is the customer and is the best method to continually improve the customer experience. Before the birth of formal frameworks for ITSM, businesses were continually looking for ways to enhance the customer experience using technology services.

In my work, there is a reliance on public knowledge to enhance IT processes, help them to be more efficient, and make improvements to them that boost quality. However, using public knowledge over time, I realized a major aspect was missing. Making enhancements in a technical environment presented many real-world challenges not addressed in books. When faced with non-text book scenarios, I came to rely mostly on business insight, skills, and experience. Knowledge and understanding of the business environment made a significant difference to overcome these challenges. What I learned is ITSM guidance for IT worked, but only so far. When using ITSM guidance in combination with business management experience, they performed better and also had an effect on maturing business operations as well.

I am perplexed that in my IT career across three decades, the industry is still struggling to accomplish Service Management successfully. From experience, I believe it has more to do with how IT sees themselves rather than the advancement of technology. Indirectly, IT views themselves as outsiders to the business. There is a sense that IT needs significantly different methods than the business to manage their operations. In reality, they do not. When I realized this, my focus shifted from technology management to transforming IT to be a strategic unit in business. I began to draw on my business management experience and surprisingly my yoga education as well. Both have provided me with practical methods to overcome the same challenges and obstacles that I encountered over and over.

Prior to shifting focus toward business, my thoughts on value became almost obsessive. The mantra recorded in my brain – value is based on customer perception became a staple in delivering better support services. This mantra lacked sufficient substance to enrich operations and the customer's experience. Measuring value on perception alone isn't reliable; but it does point out something that needs attention. Understanding your customers' behaviors provides more knowledge about them than their perception. Perception changes rapidly and it can realistically change many times in the course of a day. Behaviors are usually a pattern and do not change rapidly. Therefore, behaviors are better to focus on and recognize; it isn't realistic or practical to manage perception.

My thinking began to shift and it inspired me to seek out alternative solutions that make practical sense. My frustration in finding practices that worked, led to more practical approaches that some may consider unconventional. Formal frameworks are missing the target. Why? Because the approaches to serve one size fits all, obtaining the be all-to-all solutions, or the notorious silver bullet are illusions to figure

out. Focusing on what is real and practical exceeds expectations for business maturity, growth, and stability.

I worked with many successful organizations across South-Central and East Asia, Europe, and the United States. The industries I mostly worked in are: telecommunications, healthcare, finance, insurance, manufacturing, and retail. From these environments, I learned valuable lessons and picked up real-world practical knowledge about actual ITSM achievement. That's what motivated me to write this book and share my experiences with practical methods that helped many companies to succeed.

The industry considers People as the main correlation to ITSM achievement or failure. Lately, the people element has lowered on the priority scale. Less attention to people simply isn't realistic for real-world achievement and sustainment of a high-performing ITSM program. The human element is vitally important to succeeding in ITSM and business. People create a natural alliance in business and this is one essential area of attention to practical ITSM.

Technology gets outdated quickly. People, on the other hand, never go out of style and are the reason why businesses succeed.

This page intentionally left blank

ACKNOWLEDGMENTS

I am blessed and grateful to have an amazing family and friends who encourage me every step in this journey.

Thank you to Eva Conover for her editing services and trustworthy support to bring this book forward.

I'd also like to thank my mentors, leaders, and colleagues that I've had the honor to work with along my professional path for they have challenged me and shared valuable learning experiences and knowledge that has motivated and inspired me to write this book. Without them, this book would not be possible.

I would like to extend an invitation to Information Technology (IT) professionals, who read this book to break free from old technically focused beliefs and have the courage to be authentic with customers. Create an organizational culture that cultivates authenticity, change, and growth. Be the business and wear it proudly.

I would like to acknowledge IT professionals for their astounding expertise and knowledge for which their work has enabled the creation of this book. Without their hard work and dedication in their roles, the adoption of Service Management could not surpass the theories to reach success.

In addition, I extend many thanks to ITSMf® for the work they do to support IT Service Management professionals and to Emerald Publishing for providing the platform to share my book with the public.