



## Practical Lessons for Speeding ITIL Adoption

Leveraging Educational Services to Achieve Your ITIL and Business Objectives More Quickly

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## Executive Summary

Consider this scenario. You are given an assignment to build and integrate a system that is based on several complex technologies, many of which are new to you. Imagine having to learn these technologies armed only with a stack of thick and highly detailed textbooks. To make this experience even more real, pick up several instructional books right now. Go through some of the indexes.

As you will see, there's a lot of material that's covered in these books. How do you gain the knowledge you need in your required timeframe? There's not enough time to read and digest all the material, and there's often no need to read everything. So how do you determine what you need to know? How do you translate the theoretical information in the books into the practical knowledge you need to implement the system? What happens when you have a question related to interpreting the material?

This kind of scenario may be familiar to you if yours is one of the many IT organizations that have chosen the IT Infrastructure Library® (ITIL®) to provide service management guidance. ITIL recommendations will help you manage IT based on business priorities, an approach known as Business Service Management (BSM). The five core ITIL Version 3 (V3) books cover a broad range of complex topics in considerable detail. So, how do you shrink the learning curve to fit your required timetable — without jeopardizing your success?

Many IT organizations have turned to educational services to gain the knowledge they need in the timeframe they require. One such organization is CARFAX, Inc., the leading provider of vehicle history and used car information. According to Robert Stinnett, senior IT analyst at CARFAX, "Education is undoubtedly a central pillar of success for ITIL and BSM. Realizing value with BSM and ITIL requires educating staff on a new way of thinking and approaching IT."

Regardless of where you are in ITIL adoption, whether moving further ahead in V2 or transitioning to V3, your commitment to ITIL still represents a major effort — an effort that requires knowledge in several areas, including change management; release and configuration management; incident and problem management; asset management; and knowledge management.

A fast and cost-effective way to acquire knowledge is through training. Formal training brings a programmatic approach to ITIL that can speed the adoption process dramatically by shortening the learning curve. This paper:

- > Examines the many facets of ITIL adoption
- > Discusses how educational services can help you meet the challenge
- > Describes what to look for in an educational services offering

## The ITIL Challenge

### ITIL Affects Process, Technology, and People

ITIL includes five core books on the following topics: service strategy, service design, service transition, service operation, and continual service improvement. The ITIL books present guidelines, not implementation details. They tell you *what* you need to do in considerable detail, but not *how* to do it. It's up to you to translate the guidelines into the actual implementation of processes, and that presents a challenge. Meeting that challenge involves addressing a number of key areas that include process, technology, and people.

#### Process

You have to select the processes you need to meet your service management goals and objectives, and then translate the process guidelines in the ITIL books into actual implementable processes. That requires establishing roles and tasks for each process, as well as integrating interdependent processes. In many areas, the guidelines are open to interpretation, so different people in your organization may have various interpretations of the same guidelines. You have to determine the correct interpretations.

#### Technology

Once you have selected the processes and defined the associated roles and tasks, you then have to address the supporting technology. That means selecting and deploying the BSM solutions and tools you need to implement and enforce the processes across the organization.

#### People

Addressing the process and technology dimensions of ITIL is complex. The greatest challenge in ITIL adoption, however, is addressing the *people* dimension. It's the people on your IT staff who must perform the ITIL processes, and use the supporting solutions and tools.

You need to motivate and inform people to get them to embrace ITIL-based best practices. Different people have varying needs depending on what they already know, their role, their objectives, their personality, and their learning styles. Some may just need deeper technical confidence in how to do something. Others may require practical advice on *what* to do and *when* to do it. People want to understand the *why*. They may ask, "Why should I do things differently? How will that help achieve my objectives, my team's objectives, and my company's objectives?"

### Different Organizations Require Different Approaches

Because of the vast amount of material covered by ITIL, organizations utilize differing approaches to meet the ITIL challenge. Some have ITIL initiatives that are driven from

grass roots by local managers. Others take a top-down approach, with senior IT managers leading the charge to ITIL adoption. Many bring in consultants to help.

The vision for ITIL adoption will also differ. That vision is shaped by a number of factors, including business strategy and goals, IT strategy and goals, makeup of the IT organization, and current service management maturity level.

Differences will also occur in the path to ITIL adoption. Few, if any, set out to adopt ITIL in total, at least not in one huge bite. Most select the practices and processes they need to achieve their particular service management goals and objectives. They then follow an incremental path in adopting and implementing those practices and processes. The path taken will vary depending on a number of factors, including business priorities, current pain points, and available IT resources (budget, staff, and currently installed service management solutions).

Companies also differ in their position along the path they have chosen. Some are in the planning stages, but have not yet begun the journey to ITIL. Many are just launching ITIL initiatives. Others have implemented certain aspects of ITIL and are looking to move further along the path. Some are well along the ITIL V2 path and are looking at the implications of moving to ITIL V3. Still others have experienced slowdowns in progress along the path and need to re-energize their initiatives.

## Meeting the Challenge with the Right Educational Services

To move ahead on the path to ITIL in a way that is effective and timely, organizations need ITIL expertise and experience in all the areas that they intend to pursue. Because of the scope and detail of ITIL, however, few (if any) organizations have the breadth and depth of experience and expertise they need.

Training will be of significant help. A well-designed training program can speed your progress significantly by presenting ITIL in a structured, programmatic fashion that presents the right information to the right people in the correct order at the appropriate time. To be effective, an education program must meet a number of important criteria.

### Comprehensive, Holistic, and Structured Portfolio of ITIL-Specific Services

The educational services offering must satisfy the full scope of educational needs. That means a comprehensive offering that addresses all three dimensions of the ITIL challenge: people, processes, and technology. The offering should be

structured in a way that satisfies the different objectives of different organizations. It should help you:

- > Spread ITIL awareness across the organization
- > Perform an upfront needs analysis
- > Achieve ITIL certification
- > Implement fully fledged ITIL processes
- > Obtain “how to” instructions for your BSM solutions

The offering must cater to all levels of the IT staff because ITIL touches everyone in the IT organization. This requires educational services that span the entire organization — from high-level executive ITIL awareness sessions to detailed instruction for the people who are going to implement and use the service management solutions that support ITIL.

An offering that meets this criterion provides a holistic and structured approach to ITIL education. This approach enables IT to establish a consistent understanding of, and approach to, ITIL across the entire IT organization, thus positioning the organization for success.

### Flexible Offering

Organizations vary widely in their approach to ITIL, including the path they take in that approach and their position on the path. All have unique goals and objectives, different starting points, and varied levels of ITIL experience and expertise.

Satisfying these widely differing needs requires more than a school that offers only a fixed curriculum. It requires a wide range of educational services that can be customized to meet your unique needs. Customized private instruction permits you to increase the focus on specific aspects of particular processes and to adjust timeframes to meet your specific requirements.

### Role-based Instruction

Look for a provider that offers different educational paths for different organizational roles. Curricula directed to specific roles within IT maximize training efficiency and effectiveness by imparting the right knowledge to the right people. **Figure 1** shows an example of this type of role-based curriculum.

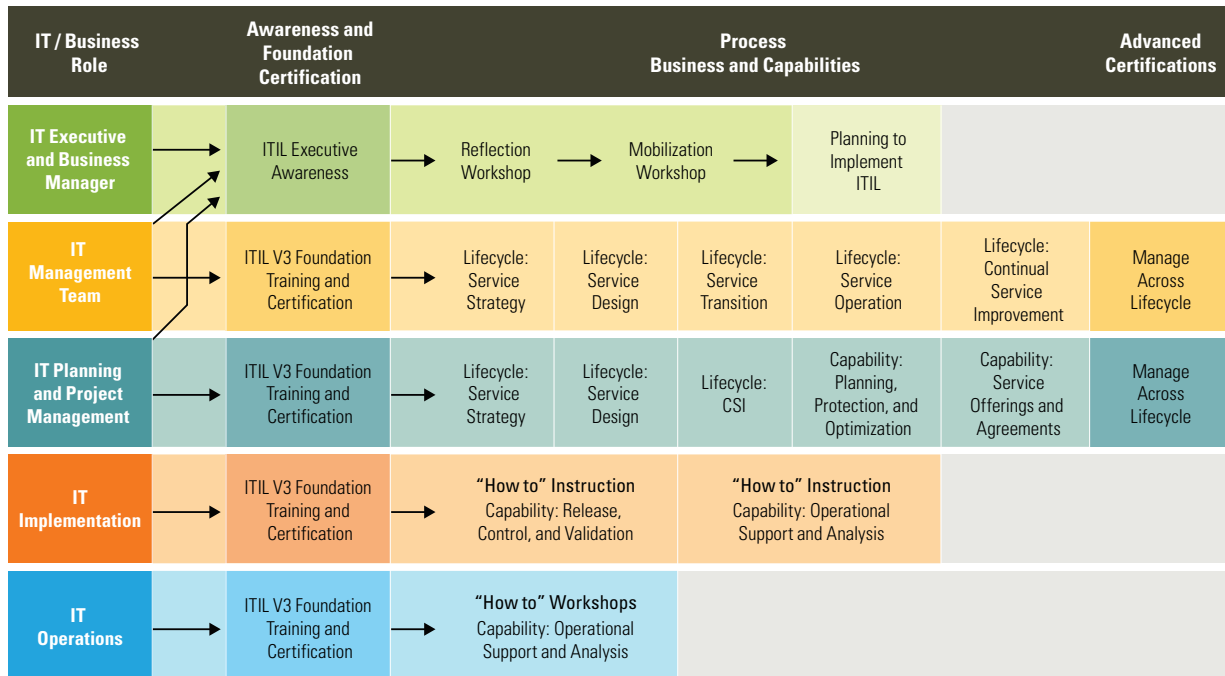


Figure 1. Example of role-based curriculum

## Business and IT Management

At the business and management level, overview sessions provide managers with a foundation of ITIL awareness.

Topics include:

- > What is ITIL?
- > What are the benefits of ITIL to the business and to the IT organization?
- > Why do organizations need to move to ITIL V3?

Overview sessions also provide a framework for advancing real-world ITIL projects in organizations to help managers translate theory into practice. Think about the following issues: What are the business goals? What IT services are needed to satisfy these business requirements? What steps do we need to take to get there?

## IT Planning and Project Management

Educational services at the IT planning and project management level educate IT staff planners in translating IT process guidelines into implemented processes with defined roles and tasks. They train managers on building practical action plans to get things moving forward. They also provide guidance on determining the organization's current position, such as its current service management maturity level, along with where the organization wants to be and how to move to that next level of maturity.

## IT Implementation

At the IT implementation level, educational services educate infrastructure engineers on implementing and maintaining service management solutions to support ITIL processes.

## Operations

At the operations level, educational services provide "how to" instruction on implementing and using IT processes and the service management solutions that support them. This instruction prepares users to leverage the full capabilities of the service management solutions you deploy to help you derive maximum value from your investment.

## ITIL Certification

Educational services provide both foundation courses and advanced courses for staff members who require ITIL certification. For example, you may want to achieve certifi-

cation for a core team and have them evangelize the value of ITIL across the organization.

## Experienced ITIL Practitioners

To be most effective, instructors must have more than just an academic familiarity with ITIL, regardless of how thorough their background. Certainly all instructors should be ITIL certified, but that's not all. Instructors should also have a strong foundation of practical experience in implementing and using ITIL-based processes and BSM solutions. Real-world experience adds credibility to instructors and also provides valuable guidance to students. This expertise based on ITIL processes and BSM solutions can help make IT transformation possible.

Nearly all ITIL processes involve technology in some way. Instructors must be able to move easily between process and technology discussions in the classroom. Instructors with practical experience have a real-world approach to ITIL that combines theory with practical application of theory. This approach helps students link processes and technology, and apply this information.

Because ITIL is a framework of guidelines, it gives rise to many questions. The instructor can answer questions based on practical experience, such as, "When we implemented that process at XYZ company, here's how we did it ...". Answers based on practical experience add significant value to the instruction, helping students learn from the successes of others and avoid common pitfalls.

## Part of an ITIL-based BSM Delivery System

Educational services should not be an afterthought considered in isolation. Instead, they should be considered as part of an overall ITIL-based BSM delivery system that facilitates IT transformation and includes:

- > Proven implementation methodology
- > A comprehensive and structured portfolio of consulting, educational, and customer support services that includes ITIL-compatible, best-practice content, such as process models and courseware
- > A comprehensive and integrated suite of ITIL-compatible BSM solutions

An effective educational services offering supports all phases of ITIL adoption, as shown in **Figure 2**.

The educational services provider should offer educational consulting services to help you determine the optimum mix of educational services upfront. That includes performing a needs analysis to help you determine exactly what services you require. It also includes establishing metrics to be used in measuring success and in driving continuous improvement.

## Case Study

More than 15 members of a major transportation company's IT organization attended ITIL training from BMC Software, which included the BSM International Airport Simulation. As part of this program, the participants played various IT and business roles for a fictional airline.

Participants report that the session reinforced the principles of BSM and showed how IT issues are presented in the business in a totally different way from the way IT sees them happen. As a result of this session, the group reviewed its service desk processes to ensure they fully understood and captured the business impact of these processes.

Based on knowledge gained in the class, the IT organization improved how it structured its trouble ticketing system to make it more effective. The organization also learned how to utilize its investments in technology to get the most value out of its configuration management database (CMDB) and service impact management solution.

The training session provided participants with good insight into the pressures experienced by the teams. It has improved the way the teams work together, and they now have a better understanding of each other's roles.

## Conclusion

Because of the wide scope and significant depth of ITIL, translating ITIL guidelines into implemented processes and ensuring adherence to those processes presents quite a challenge. ITIL touches everyone on the IT staff, so you have to expose all staff members to ITIL, bringing each member up to the level of knowledge appropriate to his or her particular job function. Moving up this learning curve in a reasonable timeframe, without jeopardizing the success of ITIL adoption, is key.

Educational services will significantly accelerate your progress. The right educational services can deliver the right lessons to enable you to achieve your ITIL objectives faster — with less risk and greater predictability. Through successful ITIL adoption, you'll move up in service management maturity level, and that enables you to achieve your business objectives faster.

For information about BMC Software educational services that support ITIL, please visit [www.bmc.com/education](http://www.bmc.com/education).

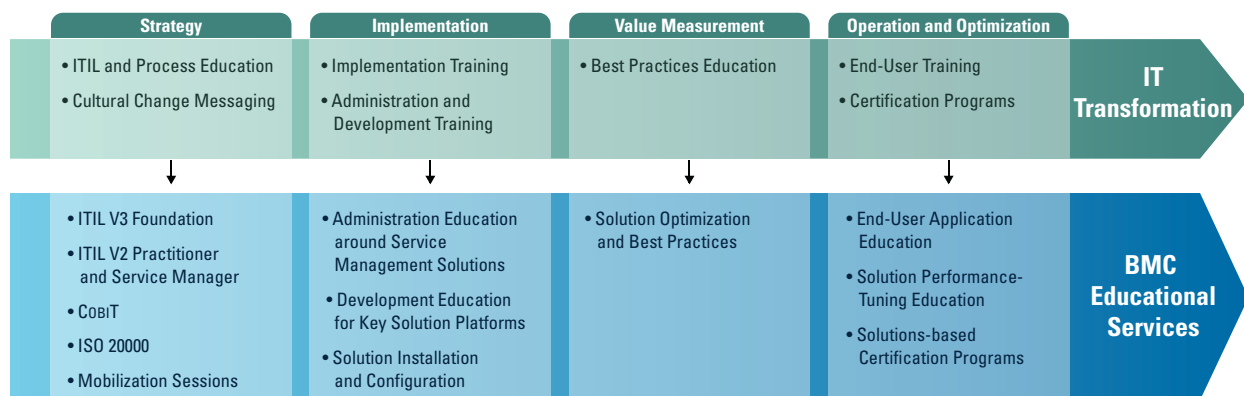


Figure 2. Educational services support IT transformation that is part of an ITIL-based BSM delivery system



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## About BMC Software

BMC Software delivers the solutions IT needs to increase business value through better management of technology and IT processes. Our industry-leading Business Service Management solutions help you reduce cost, lower risk of business disruption, and benefit from an IT infrastructure built to support business growth and flexibility. Only BMC provides best-practice IT processes, automated technology management, and award-winning BMC Atrium technologies that offer a shared view into how IT services support business priorities. Known for enterprise solutions that span mainframe, distributed systems, and end-user devices, BMC also delivers solutions that address the unique challenges of the mid-sized business. Founded in 1980, BMC has offices worldwide and fiscal 2007 revenues of \$1.58 billion. Activate your business with the power of IT. [www.bmc.com](http://www.bmc.com).

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Linda Moss, vice president, Worldwide Educational Services at BMC Software, Inc., has more than 20 years of extensive training and development experience in the global IT industry. Prior to joining BMC, she was senior director of Worldwide Education for Brocade Communications Systems, Inc. Her experience also includes operating a successful training and management consultancy in Europe for ten years, working as an advisor/trainer at such companies as Deutsche Bank, KPMG, and Black and Decker, as well as with the US Federal Government in Europe. Moss holds a Bachelor of Arts in English from The University of Gloucester, England; an MBA, Managerial Leadership concentration, from City University; and holds a PhD in Gendered Learning from The University of Kent at Canterbury, England.

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