



Ride the Express Lane in the Journey to ITIL

Combining Business Service Management Solutions with Consulting Services to Speed ITIL® Adoption

Table of Contents

- Executive Summary** 1

- A Journey that Requires Vision and Execution** 2
 - > Significant Impact on People, Processes, and Technology..... 2
 - > New ITIL Maps 2
 - > Guidelines, Not Directions 2

- The Itinerary** 2
 - > Step 1 – Establish Your Vision 2
 - > Step 2 – Assess Your Current Situation 3
 - > Step 3 – Determine Process, Data, and People Requirements 3
 - > Step 4 – Create an IT Transformation Roadmap 3
 - > Step 5 – Deploy BSM Solutions 4
 - > Step 6 – Assess Results and Continually Improve 4

- How Consulting Services Can Help** 4
 - > Moving from the Theoretical to the Practical 4
 - > Estimating Resource Requirements 4
 - > Choosing the Right Starting Point 4
 - > Avoiding Pitfalls 5

- Selecting the Right Consulting Services Provider** 5
 - > Comprehensive Service Offering 5
 - > In-depth Experience in All Required Areas 5
 - > Proven Service Delivery System Focused on BSM 5

- Real-World Example** 5

- Conclusion** 6

Executive Summary

We've all heard horror stories about how IT service disruptions closed down airports, cost financial service institutions millions per hour, and even endangered health or life when those disruptions occurred in the healthcare industry. Needless to say, the risk of similar scenarios puts tremendous pressure on IT leaders and their teams. This pressure is compounded by the need to roll out more services, while also improving service levels and reducing costs.

Driven by these demands, IT organizations are struggling to move up in IT service management maturity level. Many have opted to achieve this transformation by implementing best-practice processes based on the IT Infrastructure Library® (ITIL®) framework.

The journey to ITIL adoption is by no means trivial. It impacts technology, processes, and people. In fact, the level of effort and planning required is not unlike that of implementing an enterprise resource planning system.

A Business Service Management (BSM) approach can help your organization. BSM combines best-practice IT processes, automated technology management, and a shared view of how IT resources directly support the business. Solutions are available that implement ITIL processes and enforce their use. However, there is still considerable work ahead to achieve your desired results. You need to:

- > Select and implement the right processes and ensure they conform to ITIL guidelines
- > Select the right BSM solutions to fully support the ITIL processes; rapidly deploy and integrate them with other systems where necessary
- > Provide high-quality technical support after deployment
- > Institute a continuous improvement program to derive maximum value from your investment in solutions

These tasks require expertise in a number of areas, including ITIL, organizational change management techniques, and insights on where and how to introduce automation to improve IT operations. If your organization is like many, however, you may not have the necessary breadth and depth of expertise internally to ensure successful ITIL adoption and a low-risk transition to BSM.

Consulting services augment your in-house resources with experts who have been through many ITIL and BSM implementations. Through the combination of BSM solutions and consulting services, you will accelerate the adoption of ITIL and reap the business benefits sooner.

This paper:

- > Discusses the challenges in making the journey to ITIL and reviews an incremental approach
- > Discusses how the combination of BSM solutions and outside consulting services can help you achieve results faster
- > Examines the criteria for selecting consulting services

A Journey that Requires Vision and Execution

The journey to ITIL is challenging and requires clarity of vision and a disciplined execution to achieve that vision. By following ITIL practices, your IT organization will become more closely integrated with the business. As such, you will substantially increase the ability of IT to improve the services it delivers, lower the cost of providing those services, and create significant business value.

Significant Impact on People, Processes, and Technology

Adopting ITIL has far-reaching effects on people, processes, and technology. The greatest impact is on people. The people in your IT organization must adapt to a more business-focused, process-oriented approach that transcends functional silos.

With respect to processes, the transformation to ITIL involves:

- > Moving to a process-oriented approach
- > Eliminating manual processes
- > Integrating IT processes and sharing information within and across IT disciplines
- > Continually improving processes

Effectively transitioning to ITIL also requires the deployment of technology that implements and enforces ITIL processes, and extends to the management of relationships with partners.

New ITIL Maps

ITIL provides comprehensive “maps” for this journey. ITIL V3, which was released in 2007, completely reorganizes the seven ITIL V2 books into five core books: *Service Strategy*, *Service Design*, *Service Transition*, *Service Operation*, and *Continual Service Improvement*. Each includes a substantial amount of material to digest and interpret on your own.

ITIL V3 reorganizes the processes based on a service life-cycle approach, so even if your organization has already begun the transition to ITIL V2, you will need to learn what it takes to move on to ITIL V3.

Guidelines, Not Directions

ITIL is, by definition, a framework. Although it tells you what to do, it is merely prescriptive and does *not* provide the details on how to do it. You must carefully consider the best practices outlined in the ITIL books and then apply them to your organization’s specific process, policies, governance, culture, and business requirements.

It’s important to select which ITIL processes you need to implement, and determine how and when it is best to do

so. You will likely have to select processes from additional frameworks, such as Control Objectives for Information and related Technology (COBIT), Six Sigma, and the Capability Maturity Model Integration (CMMI), to gain the control you need to meet governance requirements. The guidance you follow depends on your industry, business objectives, and compliance requirements. Once you have selected the processes, you then have to implement them and tailor them to your environment.

The Itinerary

Based on its extensive experience in ITIL and BSM implementations, BMC recommends making the journey to ITIL in a sequence of incremental steps, the phases of which are driven through execution of a strategic transformational roadmap. Each step is essential and provides the prerequisites for the remaining steps.

Taking a BSM approach will help you reach your destination faster by directly addressing the people, process, and technology dimensions of ITIL. BSM addresses the *people* dimension by automating processes and providing step-by-step guidance that makes it easy for users to adopt the new processes. By requiring users to perform all required steps, the solutions force adoption of the new processes. BSM aligns closely with ITIL and supports service management best practices based on ITIL processes. Finally, BSM technology can be used to implement and support ITIL processes. In essence then, BSM provides a fast lane for your journey to ITIL.

Here are the major steps.

Step 1 — Establish Your Vision

In this first step, you determine where you want to go. You establish a vision by defining the goals and mission of IT in your organization. What do you want IT to accomplish? Your list should include a variety of factors, such as standardization, consolidation, cost containment, regulatory compliance, and greater agility in accommodating change, such as a large-scale merger or acquisition. You must also assess what is at stake if you do not accomplish your mission or achieve your goals.

Addressing these issues in establishing your vision will focus your organization on integrating IT with the business — the central theme of ITIL V3. Consequently, your goals should be business oriented and jointly set with representation from the business users that IT serves.

Simplicity and clarity are key. Limit the scope of your goals to five or ten critical success factors. Ensure that your goals are represented as IT project objectives and stated

explicitly in terms of impact to business initiatives and priorities. Don't just consider immediate pain points. Instead, take a long-term view.

It's important to clearly articulate the direction of your program to the IT staff. If your team understands why you are adopting ITIL, they are more likely to embrace it. Build the case for change, and communicate it broadly and frequently. Articulate why doing nothing is not an option, and provide a vision and roadmap for the future. To ensure organizational change readiness, begin a communications program early to achieve staff awareness. Explain the BSM and ITIL strategy — and its benefits to the IT staff — as early as possible and obtain staff buy-in. Culminate the communications program with formal process and tools training.

Step 2 — Assess Your Current Situation

In this step, determine where you are today and how far you have to go to reach your destination. Perform a "needs analysis" based on your vision. Assess the technology, processes, and people you have in place today to support the objectives. Then, focus on your deficiencies by identifying the shortcomings (usually recognized as pain points). Perform a "gap analysis" to determine areas for improvement. Do not limit your analysis to technology; it's important to seek areas for process improvement and better role definition. Establish measurement and incentives to drive behavior. (Remember the adage: "what gets measured gets done.")

Step 3 — Determine Process, Data, and People Requirements

Here, you determine the steps required to improve the technology, processes, data, and people-related requirements. Select the ITIL processes you need to implement in order to achieve your goals. It's important to focus on processes at this point, and not address the functionality of the enabling technologies required to support the processes. Once you define the processes, you will align the technology to those processes (see Step 4).

Keep in mind that organizations don't typically adopt all of ITIL practices, and the implementations are usually done incrementally. Your choices may be limited by such factors as the practicality, cost, and time of implementation; IT and technology structure; and business practices. You may determine that you already have strong processes in place in certain areas, such as in business continuity, and do not need to improve them. It is also important to consider other supporting best practices that you may choose to adopt, such as COBIT.

ITIL is process driven, and processes are data driven. Once you have determined your process requirements, you must

consider the foundation data the processes will require, such as infrastructure configuration data, performance and availability data, and user data. This data will ultimately be represented in your data architecture and is essential for tying disparate IT processes and disciplines together in a common view.

You also need to determine your *people* requirements. Consider obtaining ITIL certification for certain staff members.

Step 4 — Create an IT Transformation Roadmap

Here, you define your plan for moving to ITIL and deploying the BSM solutions to support your efforts; that is, you create an IT transformation roadmap. It's advisable to take an incremental approach. Prioritize your requirements by addressing the area of greatest pain first, such as incident and problem management, change management, or access management. Then move on to other areas in the order of decreasing pain. It's a good idea to involve business users at this step because the implementation priorities you set should be based on business impact.

You also have to make the business case for the transformation to obtain funding. Take advantage of the incremental approach to implementation by also employing an incremental approach to funding. Seek funding by building an effective ROI and business case for the investment.

Look for opportunities to achieve self-funding. That means demonstrating significant ROI for each incremental implementation, so that your return exceeds the cost of implementation. If you implemented change management, you can use the resulting business impact of successes you achieved (such as the business impact of decreasing the downtime caused by failed changes) to justify the implementation.

Demonstrated success in one area also makes it easier to secure funding for implementing succeeding areas. For example, when the ROI for change management has been demonstrated, you will have more confidence in projecting the ROI of implementing incident and problem management initiatives.

For each area you address in your incremental approach, translate the processes into technology by identifying the BSM solutions required to support ITIL practices and any other processes you have selected. For example, the configuration management database (CMDB) is an essential component of any ITIL implementation. The CMDB provides a single source of accurate information about your infrastructure. It is a repository of information that relates to all the configuration items across the IT environment. (The CMDB is part of the configuration management system

{CMS}, which ITIL V3 defines as the set of tools and databases you use to manage your configuration data. According to ITIL V3¹, the CMS also includes a variety of other information that may include incidents, problems, known errors, changes, and releases. The CMS may also contain data about employees, suppliers, locations, business units, customers, and users. The CMS includes tools for collecting, storing, managing, updating, and presenting data about all configuration items and their relationships). You now need to specify how the CMDB will provide the BSM solutions with access to the foundation data you defined in Step 3.

You should also establish measurements that will enable you to assess both the health of the IT processes and the effectiveness of their implementation from a business perspective. The metrics must be meaningful to business users and measure services as seen from the end-user perspective. For example, you may want to measure end-to-end transaction times or end-to-end incident response and resolution times.

It's important to provide training on the BSM solutions at this step, so your IT staff can gain maximum value from the solutions once they are deployed.

Step 5 — Deploy BSM Solutions

This step involves deploying the BSM solutions in the sequence you defined in the IT transformation roadmap (created in Step 4). The out-of-the-box capability of BSM solutions to translate the ITIL process guidelines into detailed best-practice processes gives you a significant head start, but there is still work to be done.

Create a project plan for each deployment in the sequence. When planning the installation of the solutions, remember that installation requires configuration and personalization of the solutions for your particular environment. This involves such tasks as adding custom data fields, tailoring screen layouts, and specifying rules unique to your organization.

Installation also includes the deployment of the CMDB. In Step 3, you defined the foundation data you need for all processes. In Step 4, you defined your data model and how the CMDB provides access to that data. Now, in this step, you deploy and incrementally populate the CMDB as you add processes, and then put technical support in place to help your end users in their use of BSM solutions.

Step 6 — Assess Results and Continually Improve

Using the metrics you developed in Step 4, measure the results and make changes where required to improve results. Continue to measure and improve results in an iterative fashion.

How Consulting Services Can Help

The right outside consultants can leverage their substantial experience in implementing ITIL practices and using BSM solutions to help you navigate through all six implementation steps. One area in which consultants can be of great service is in helping you answer four important questions:

- > How do I move from the theoretical to the practical?
- > How do I estimate my resource requirements?
- > Where do I begin?
- > How do I avoid pitfalls?

Consultants augment your in-house expertise with their experience and expertise to help you answer these questions. This minimizes risk and ensures a predictable outcome.

Moving from the Theoretical to the Practical

You must select, from the comprehensive directions in the ITIL books, a set of specific processes you need to implement for each area you plan to address. (You identified these areas in Step 2.) You must also decide which process management approach to take. Experienced consultants can guide you through these critical and daunting tasks by helping you:

- > Define and document all the processes within the scope of your initiatives
- > Define and document the activities that comprise each process
- > Define and document the roles involved in each process and the responsibilities of the people in those roles
- > Identify the points of interaction and integration of each process with other processes
- > Establish your process management approach; that is, establish the ongoing metrics and measurements needed to assess the health of the defined processes and to identify the policies that your organization will follow to ensure adherence to the processes

Estimating Resource Requirements

You want to avoid the risk of either underestimating the resources required and then coming up short, or overestimating the resources and not getting funding. Here, experience in implementing ITIL change programs and supporting automation is essential. Consultants create and validate realistic and detailed project plans in Step 5, and use those plans to accurately identify the resources required for each activity.

Choosing the Right Starting Point

In Step 4, you prioritized the implementation of the processes in each area based on your current needs. The approach you take in implementing new processes is determined by

the current state and maturity of your current processes. Consultants use proven methodologies and metrics to accurately assess your current situation.

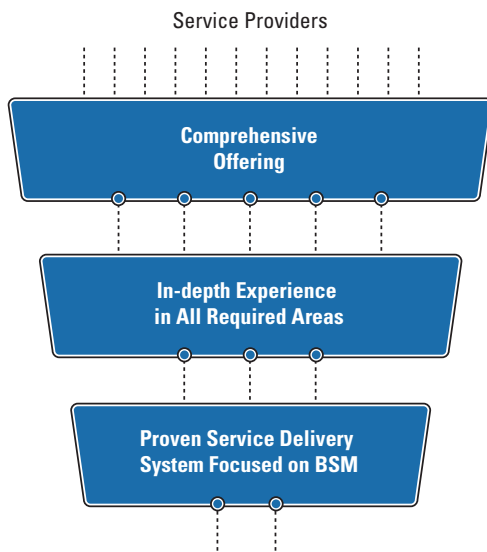
In addition, it may be necessary to implement several processes in parallel, such as interdependent processes. Experienced consultants ensure proper integration among processes and ensure that the BSM solutions you implement support that integration.

Avoiding Pitfalls

Supplement your in-house experience by learning from the mistakes, as well as the successes, of other organizations that have adopted ITIL and implemented BSM initiatives. Consultants help to ensure that you avoid potholes as you travel on your journey.

Selecting the Right Consulting Services Provider

There is a wide variety of consulting services providers available. How do you select the right one to ensure that your resulting BSM implementation will be based on ITIL guidelines? How can you be sure that you are getting the most value from your investment? Figure 1 presents a three-stage filter that you can use to identify those service providers most able to help you ensure a successful outcome.



Comprehensive Service Offering

The service provider you select should offer a comprehensive spectrum of services that includes not only consulting services, but also education and technical support services. There are many service providers more than willing to supply you with an army of consultants. But do they complement their consulting services with a menu of standard and customized training services? Do they also offer technical support services to your users to help you support the

implementation after you deploy it? Finally, do they provide managed services, giving you the option to have them manage your BSM solution environment for you? These managed services give you options for provisioning and operating your software by:

- > Providing software as a service
- > Managing ongoing administration and maintenance
- > Providing experts that can utilize technology on your behalf to deliver best-practice results

In-depth Experience in All Required Areas

Look and demand that the provider has in-depth expertise and experience in ITIL V2, ITIL V3, BSM strategy, and BSM solutions. This requires experience in transforming ITIL guidelines into actionable processes that include definition of tasks and activities, roles and responsibilities for these tasks, process interaction, and establishment of rules and policies to support the processes. It also requires in-depth experience in the deployment of BSM solutions and their integration with other systems.

Proven Service Delivery System Focused on BSM

The most important stage of the filter is to secure a vendor that offers more than just an army of consultants. Seek one that provides a proven delivery system that is focused explicitly on BSM. That delivery system should include:

- > A comprehensive and integrated suite of BSM solutions
- > A proven BSM implementation methodology evolved through hundreds, if not thousands, of implementations
- > A comprehensive and structured portfolio of consulting, educational, and customer support services that includes best-practice content, such as process models and courseware

The delivery system should employ proven, repeatable practices for BSM implementation, but should not restrict you to a "one-size-fits-all" approach. Instead, it should be modular and customizable to your specific requirements, taking into account your current capabilities and service management maturity level. The system should also foster an incremental approach, taking "bite-sized" pieces and adding measurable and demonstrable value with each piece.

A well-architected BSM delivery system provides an ideal vehicle in which to ride the express lane provided by BSM.

Real-World Example

A large enterprise set out to improve the services it provides to the business by adopting ITIL and implementing BSM solutions. The company engaged BMC Consulting Services to help in its journey, and has achieved compelling results.

Using a proven assessment methodology and metrics provided by expert BMC consultants, the company gauged its current situation and prioritized IT service support as the area with the greatest opportunity for improvement. In fact, it identified a potential \$50 million in savings over five years.

Through process and technology workshops provided by BMC, the company was able to determine the key data requirements and organizational considerations to be addressed. In addition, by leveraging the experience of the consultants, the IT staff derived an innovative process and technology integration strategy that saved more than two person-years of work, greatly reducing the implementation timeframe.

The results have been outstanding. The company made an on-schedule roll out of the implementation to 140,000 users. IT realized significant value in the first 45 days of going live. The first-call resolution rate jumped from 91 percent to 96.5 percent, and customer satisfaction increased from 96 percent to 98 percent.

Conclusion

The journey to ITIL is a challenging one. You can get in the express lane by adopting a BSM approach, but there are still challenges that require experience and expertise to address.

The right consulting services provider fills the gaps in your in-house experience and expertise. That provider also puts you in a speedy vehicle, a BSM delivery model², in which to travel in the BSM express lane to your ITIL destination.

When you reach your destination, you can reap many of the same benefits that other organizations are already enjoying with ITIL and BSM. These include improved service quality, lower costs of service delivery, and greater ability to meet regulatory requirements.

For more information on the BSM consulting services offered by BMC, visit www.bmc.com/consulting.

Footnotes

- 1 ITIL® Glossary V3, 1.24, 11 May 2007, http://www.best-management-practice.com/gempdf/ITIL_Glossary_V3_1_24.pdf. See Configuration Management System.
- 2 The BSM Delivery Model lays out the solutions, services, and best-practice content available from BMC and its partners, targeted toward the key milestones common to successful BSM programs. With the service capabilities mapped out in the BSM Delivery Model, BMC and its partners can lead you through all four aspects of a BSM program: Strategy, Implementation, Value Measurement, and Operation and Optimization.



ACTIVATE BUSINESS WITH THE POWER OF I.T.™

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 2008 revenues of \$1.73 billion. Activate your business with the power of IT. www.bmc.com.

About the Author

As Director of Consulting Services for BMC, Stephen Davito is responsible for worldwide practice management in IT transformation consulting, IT service management, service automation, and identity management. He is responsible for go-to-market offerings, solution design and delivery methodologies, and consultant enablement programs. Prior to joining BMC, he was a member of the Process Competency Group at Andersen Consulting (now Accenture). Davito has over 13 years of experience in service management, organizational change management, and consulting to IT leadership on how best to align their organizations to the business. He has achieved certification as a BMC Remedy approved consultant and certified ITIL practitioner.

To learn more about how BMC can help activate your business, visit www.bmc.com or call (800) 841-2031.

BMC, BMC Software, and the BMC Software logo are the exclusive properties of BMC Software, Inc., are registered with the U.S. Patent and Trademark Office, and may be registered or pending registration in other countries. All other BMC trademarks, service marks, and logos may be registered or pending registration in the U.S. or in other countries. ITIL® is a registered trademark, and a registered community trademark of the Office of Government Commerce, and is registered in the U.S. Patent and Trademark Office, and is used here by BMC Software, Inc., under license from and with the permission of OGC. IT Infrastructure Library® is a registered trademark of the Office of Government Commerce and is used here by BMC Software, Inc., under license from and with the permission of OGC. All other trademarks or registered trademarks are the property of their respective owners. © 2008 Copyright BMC Software, Inc. All rights reserved.

