CERN assessment feedback

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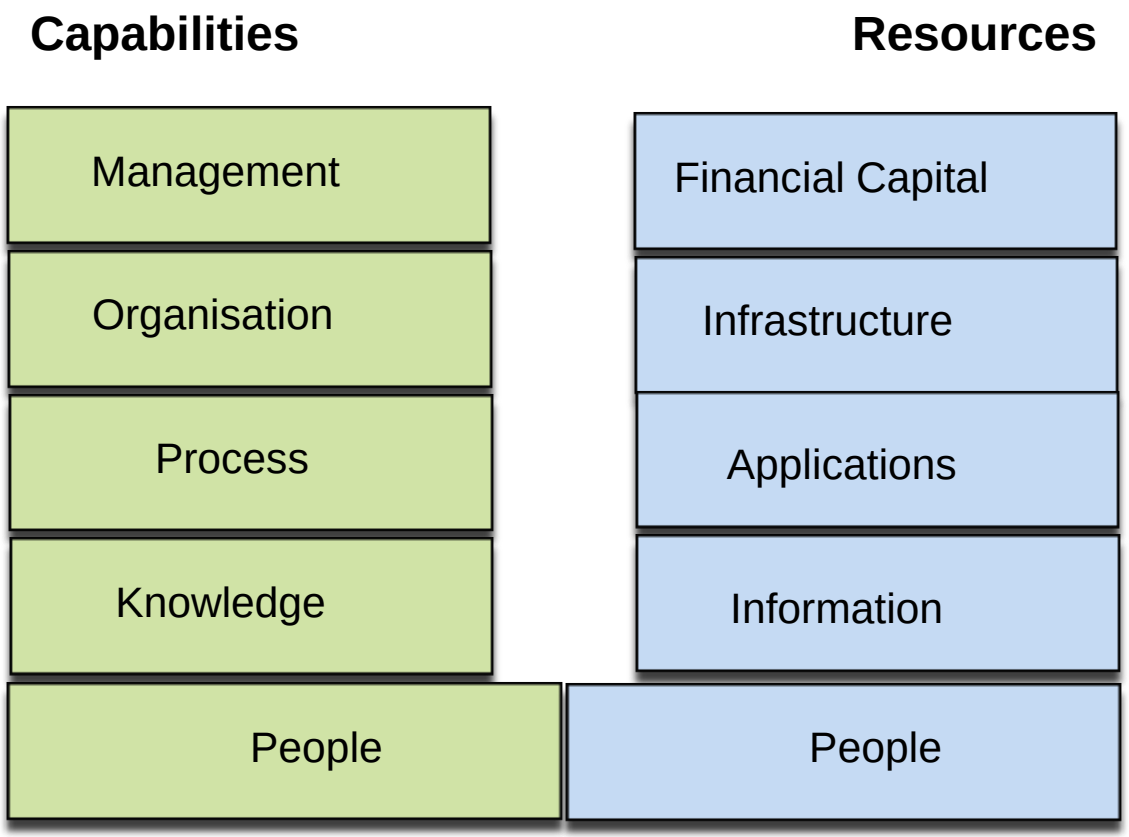
Agenda

- *Introduction*
- *ITIL® the purpose and benefits*
- *CERN the current situation*
- *Analysis and findings*
- *Service management assessment results*
- *Recommendations*
- *The way forward – tactically and strategically*
- *Summary*

Service management – The purpose

- *Definitions:*
  - A service: is a means of delivering *value* to *customers*, by facilitating *outcomes* customers want to achieve without the ownership of specific costs and risks
  - IT Service Management (ITSM): is a set of *specialized organizational capabilities* for providing *value* to *customers* in the form of *services*.
- *The purpose of ITSM:*
  - To develop the *capability* of organisations to think and act in a *strategic manner*, by using *assets effectively* with *superior performance* in achieving *strategic goals*

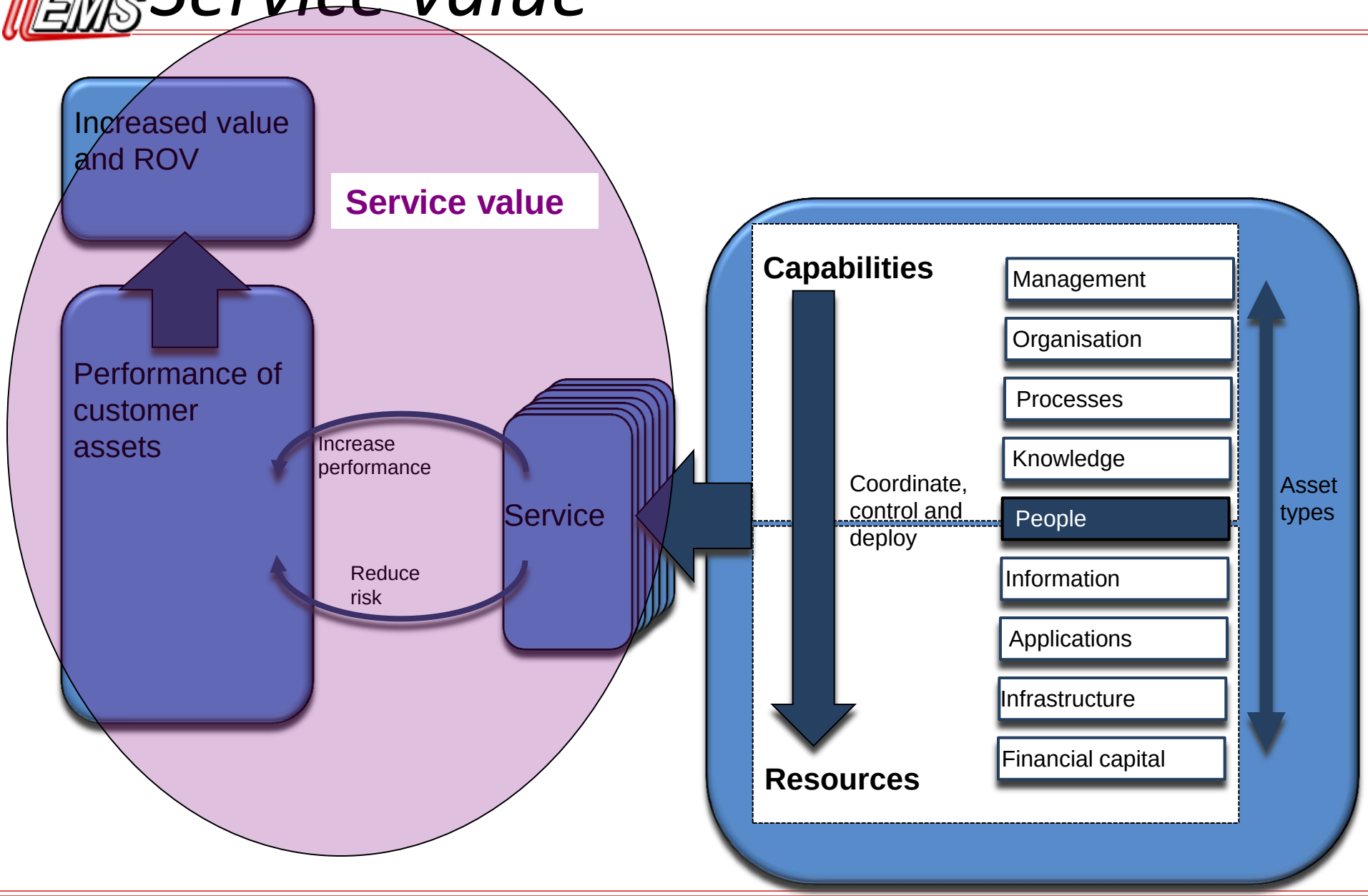
Service assets



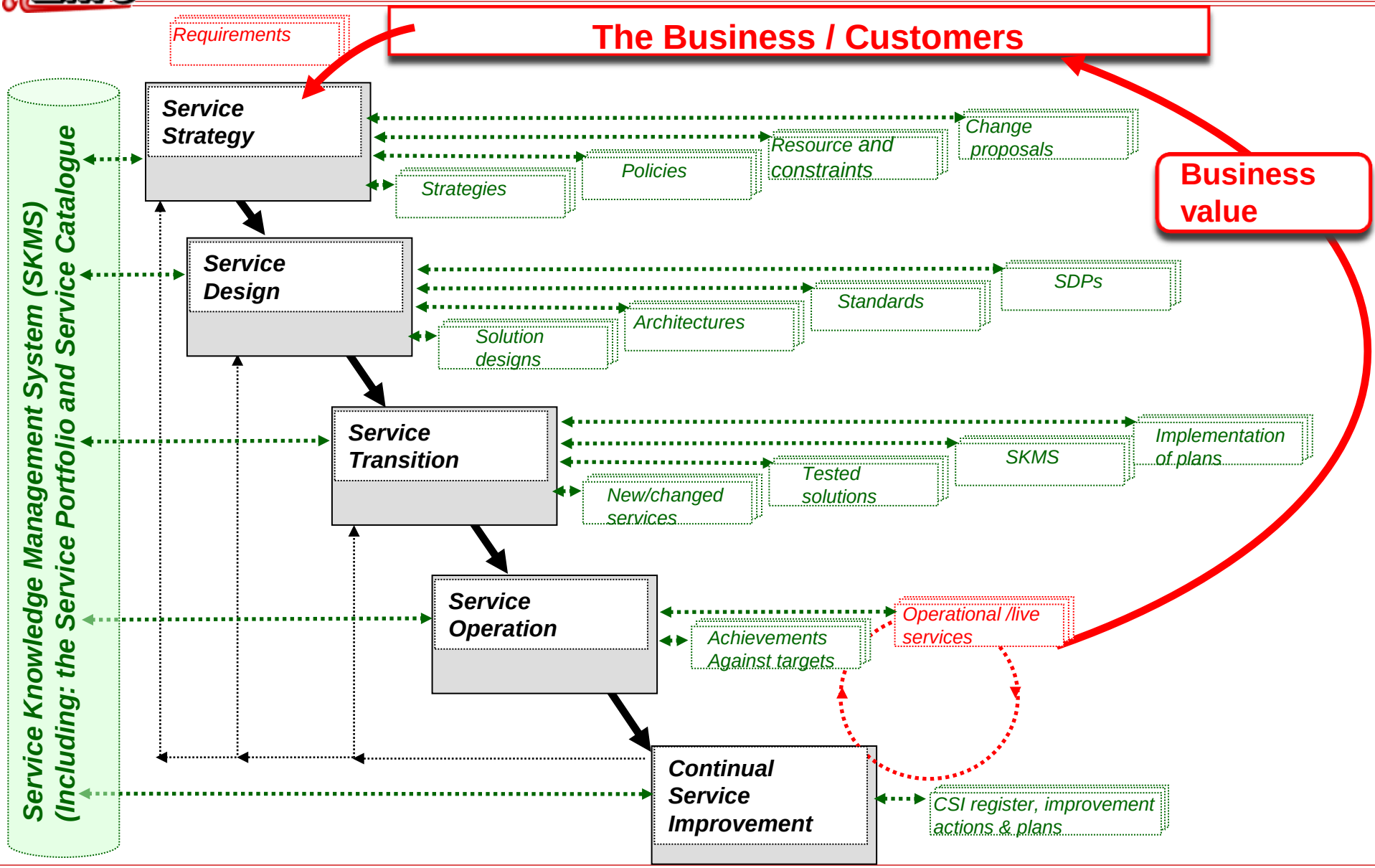
Service management – What is it ?

- *A framework*
- *Established industry best practice, used by thousands of organisations worldwide*
- *A strategic approach, covering all areas of IT*
- *Business and customer focussed*
- *A set of management processes covering the complete service lifecycle*
- *An approach to 'adopt and adapt' to ensure service solutions fit the individual organisational requirements*

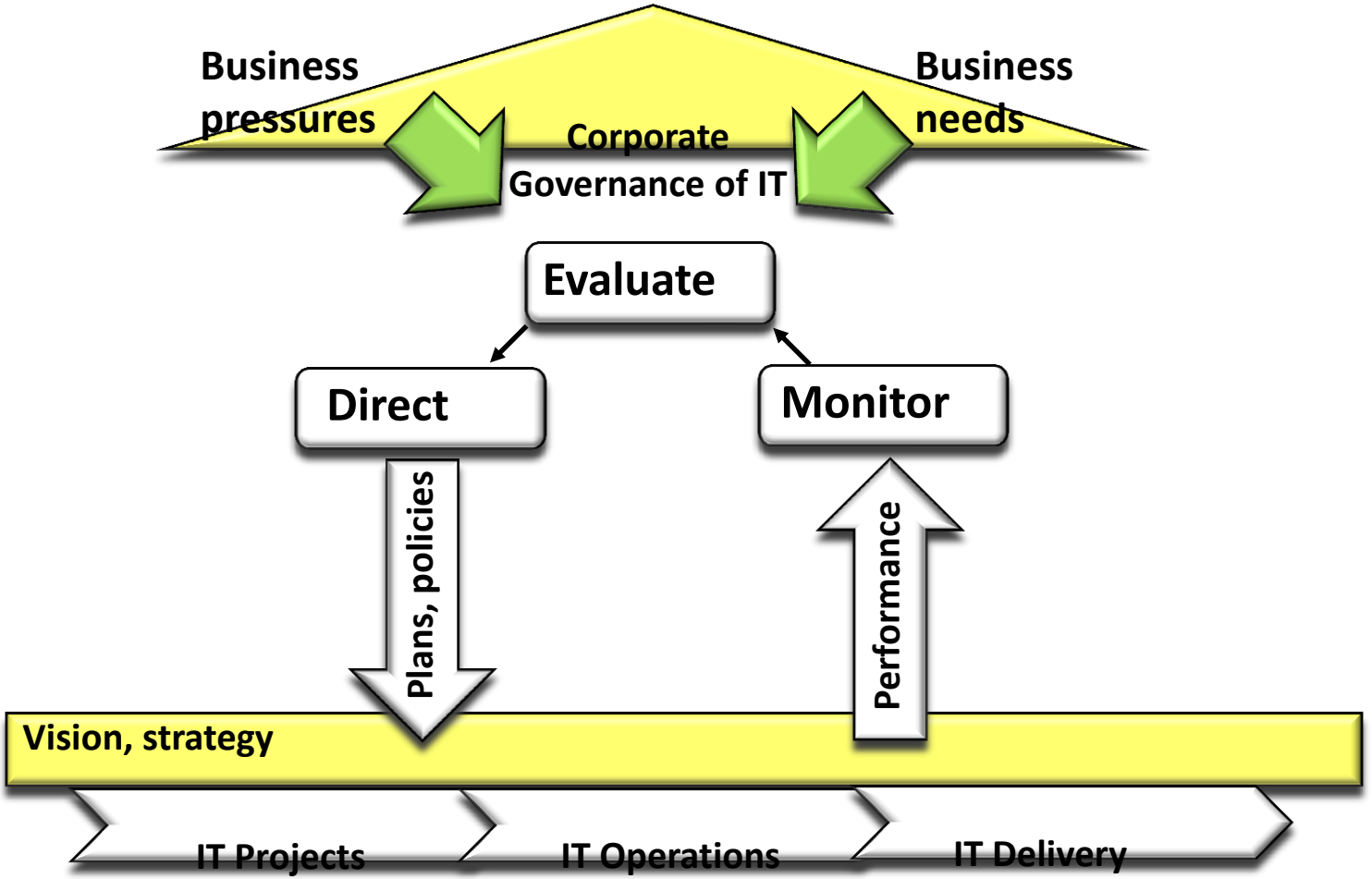
Service value



ITIL® – what is it



Governance



Note: Diagram based on ISO 38500, the international standard for corporate governance of IT

Benefits of service management

- *Improved business understanding, alignment and integration*
- *Increased focus on business outcomes, business benefits realisation and customer service*
- *Improved added business value and quality of services*
- *Consistent, effective and efficient processes*
- *Greater agility and innovation*

CERN– terms of reference

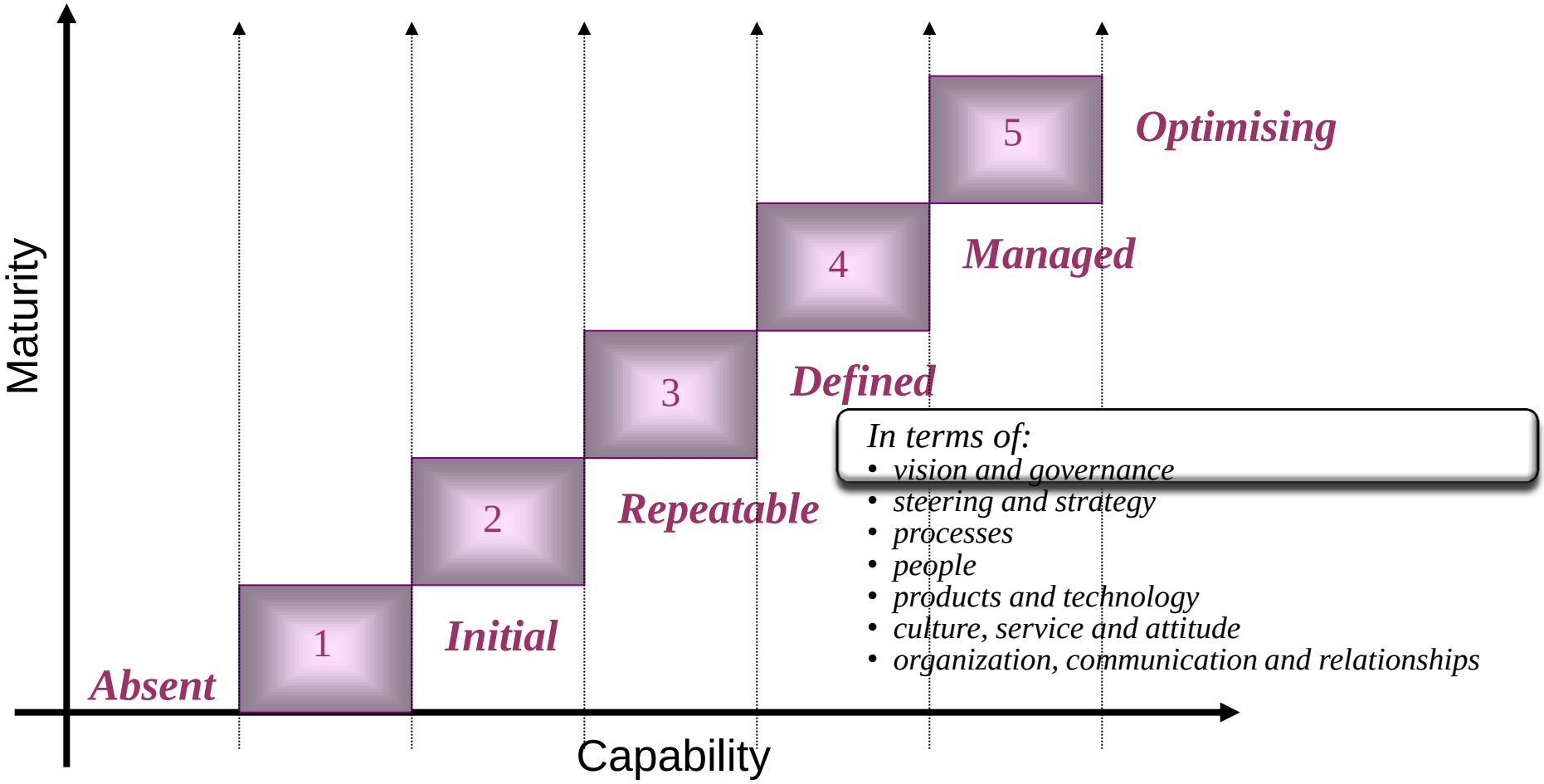
Conduct and complete a review of CERN to:

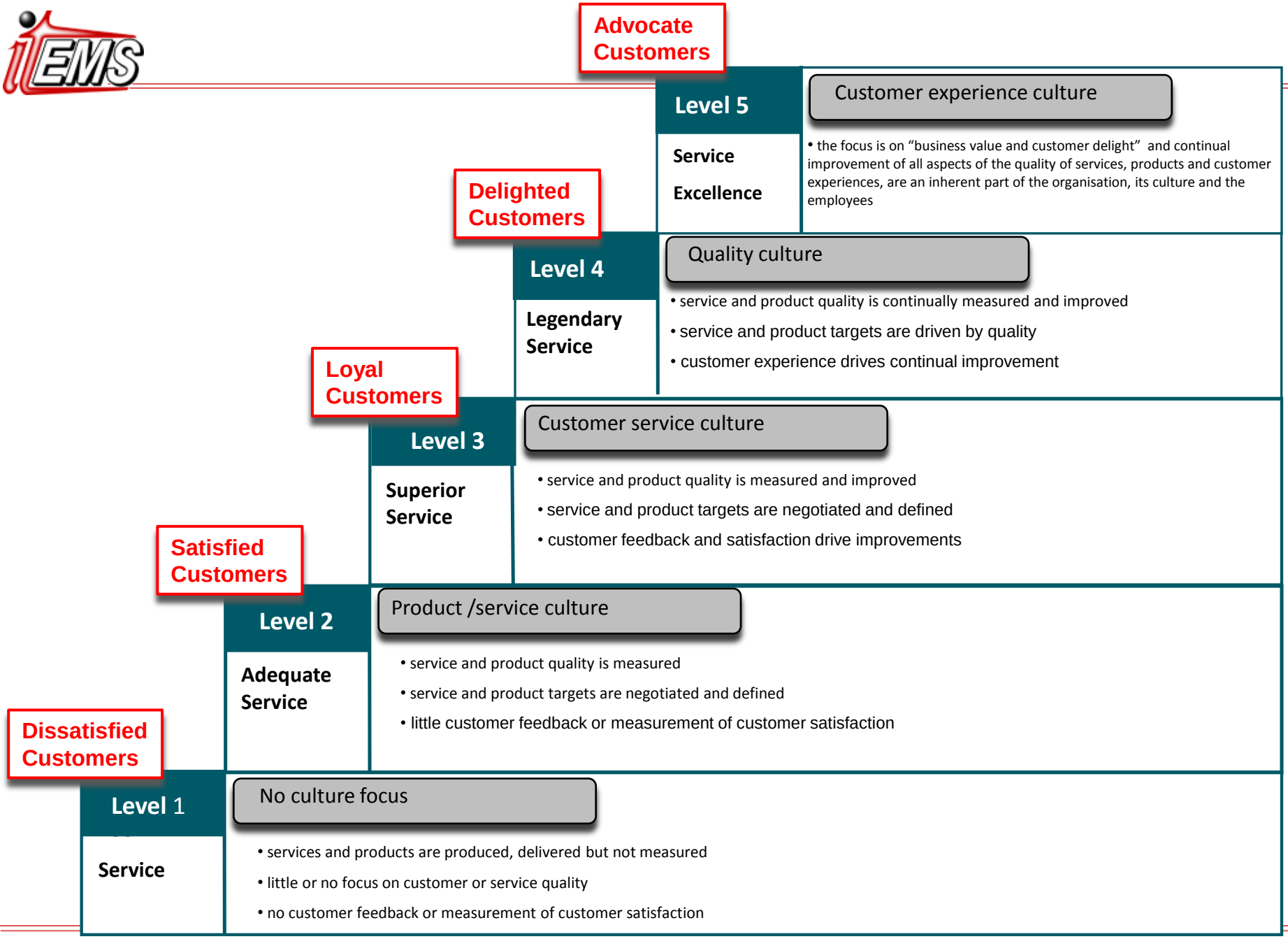
- *Conduct a series of interviews with appropriate staff to assess the current capability and maturity*
- *Analyse the results to provide a benchmark of the current situation*
- *Review the processes and activities and produce a report summarising the findings*
- *Provide a prioritised set of recommended improvement activities*

Scope

- *Processes:*
  - Incident management
  - Service request fulfilment
  - Event management
  - Problem management
  - Change management
  - Knowledge management
  - Service level management
  - Service catalogue management
- *Functions*
  - The service desk
  - Technical support
  - Service portal

The approach





CERN – the current situation, summary

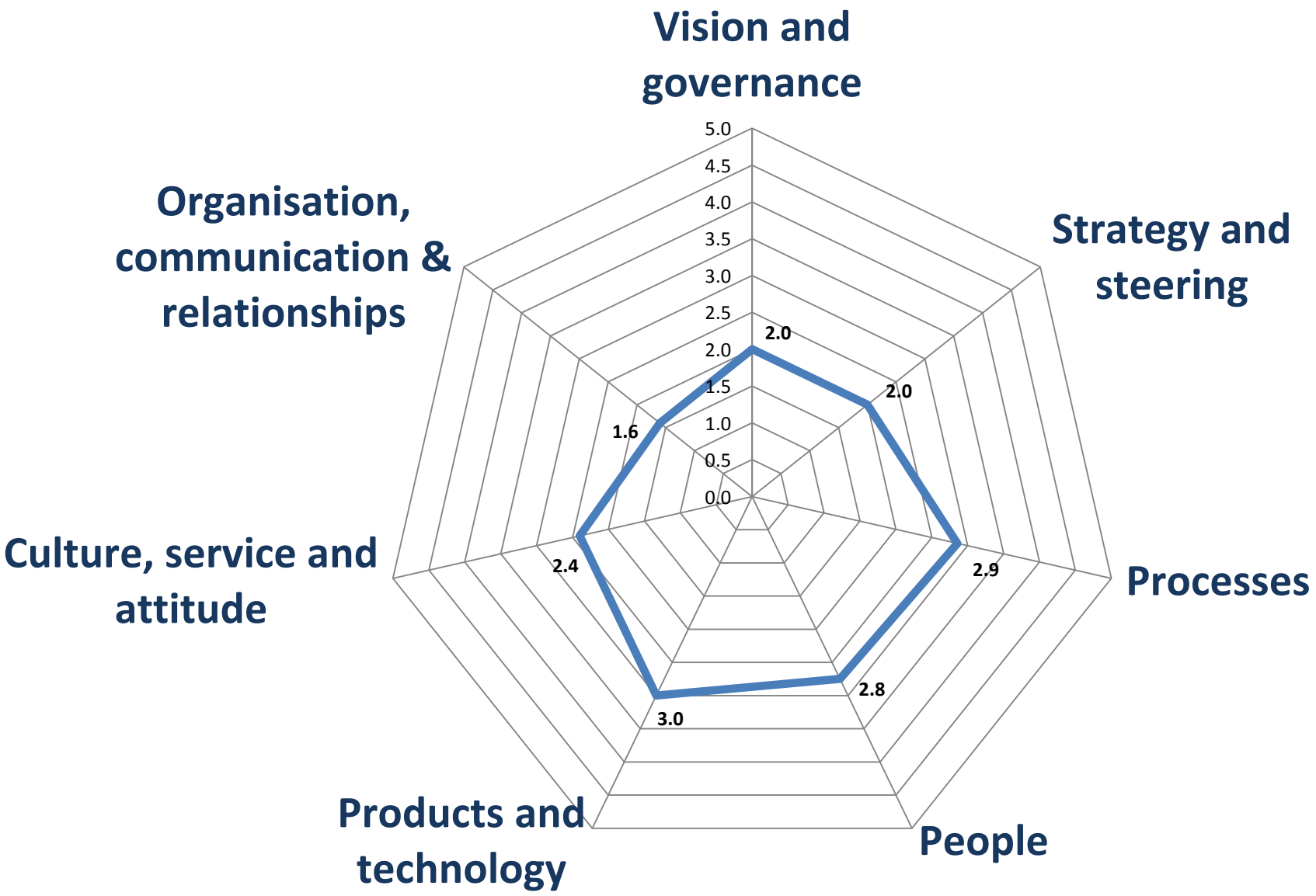
- *There are many good practices and processes in operation*
- *There is much pride and enthusiasm within the staff, they all want to do well and provide a quality service*
- *There are inconsistencies in the way teams work*
- *There are gaps in some key areas and duplication in others*
- *There is little guidance or framework for overall service focus and improvement*
- *There is a general focus on system and technology within IT, rather than a business and service focus, although this is starting to change*
- *There are few business performance or quality measurements or metrics - primary measures: service desk metrics*

CERN - Future challenges

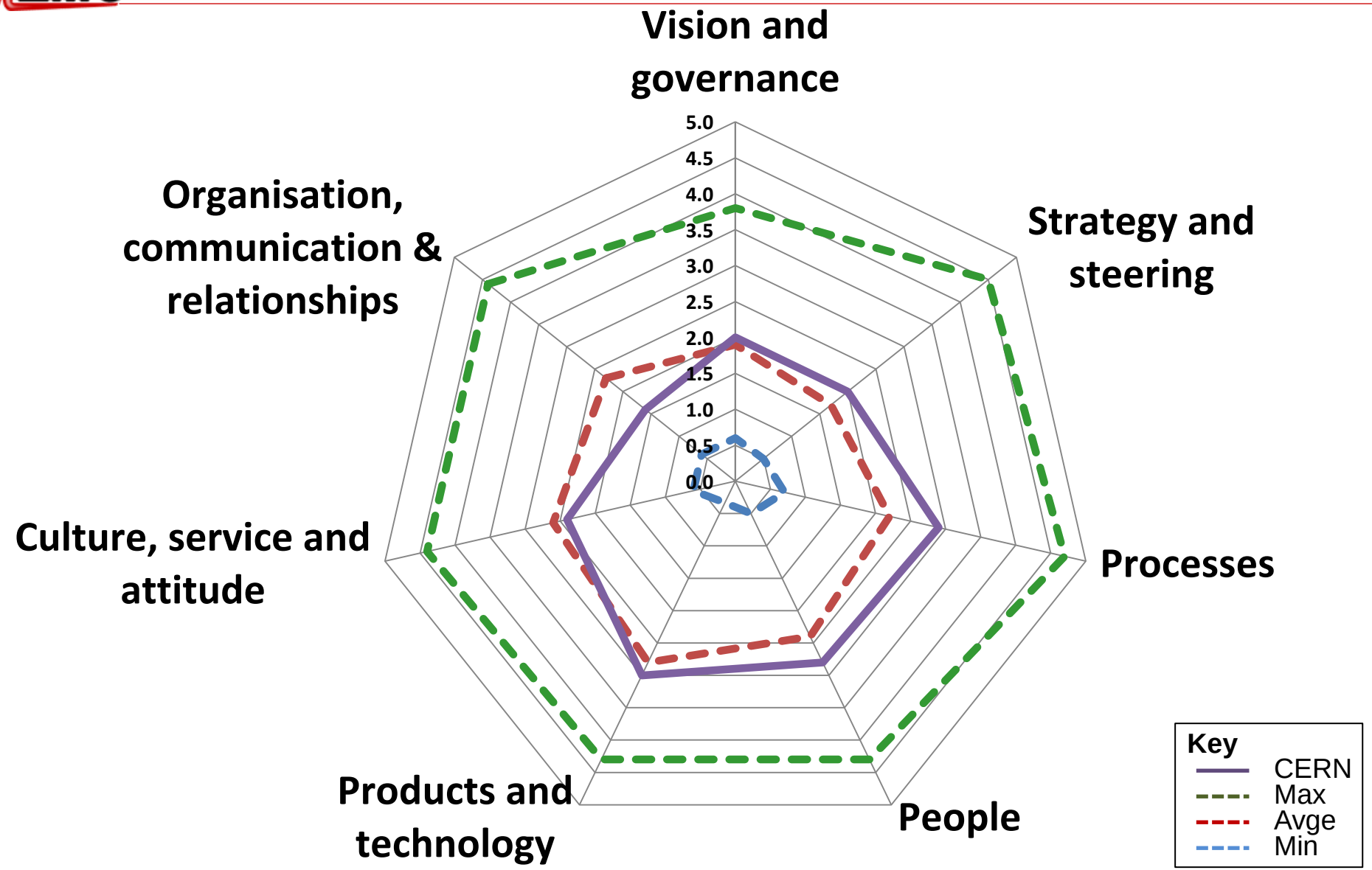
- *Huge demands - limited capacity, budgets and resources*
- *Need to deliver more solutions and changes – balanced against the need for maintenance and support work*
- *Need to become more agile*
- *Deliver reasonable levels of service, but need to continue and improve*
- *Decide how much and which processes are right for CERN*
- *Become more effective and efficient in service delivery*
- *Focus and prioritise on business requirements, criticality and value*

KEY FINDINGS

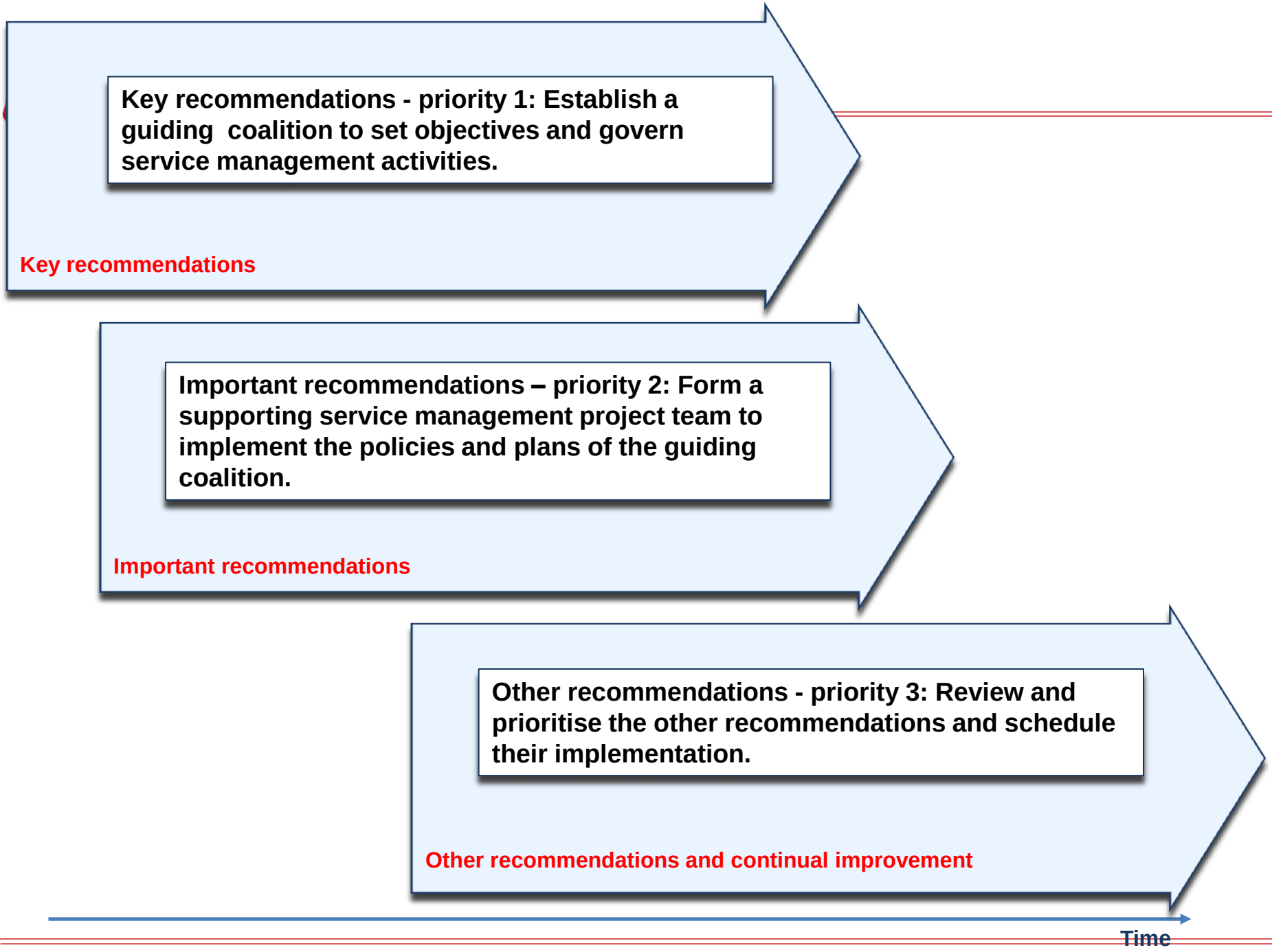
The bigger picture



Industry comparison figures

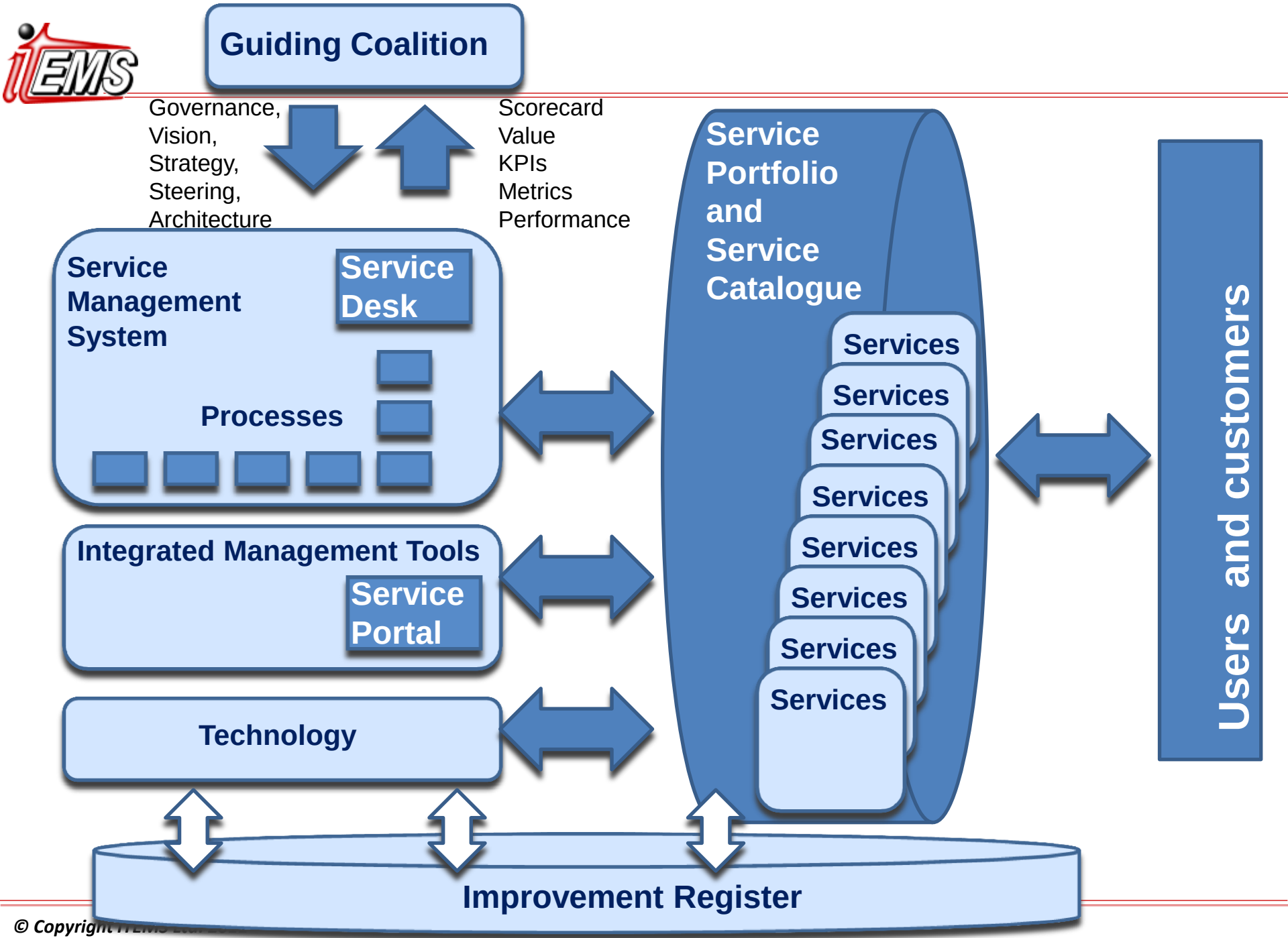


KEY RECOMMENDATIONS



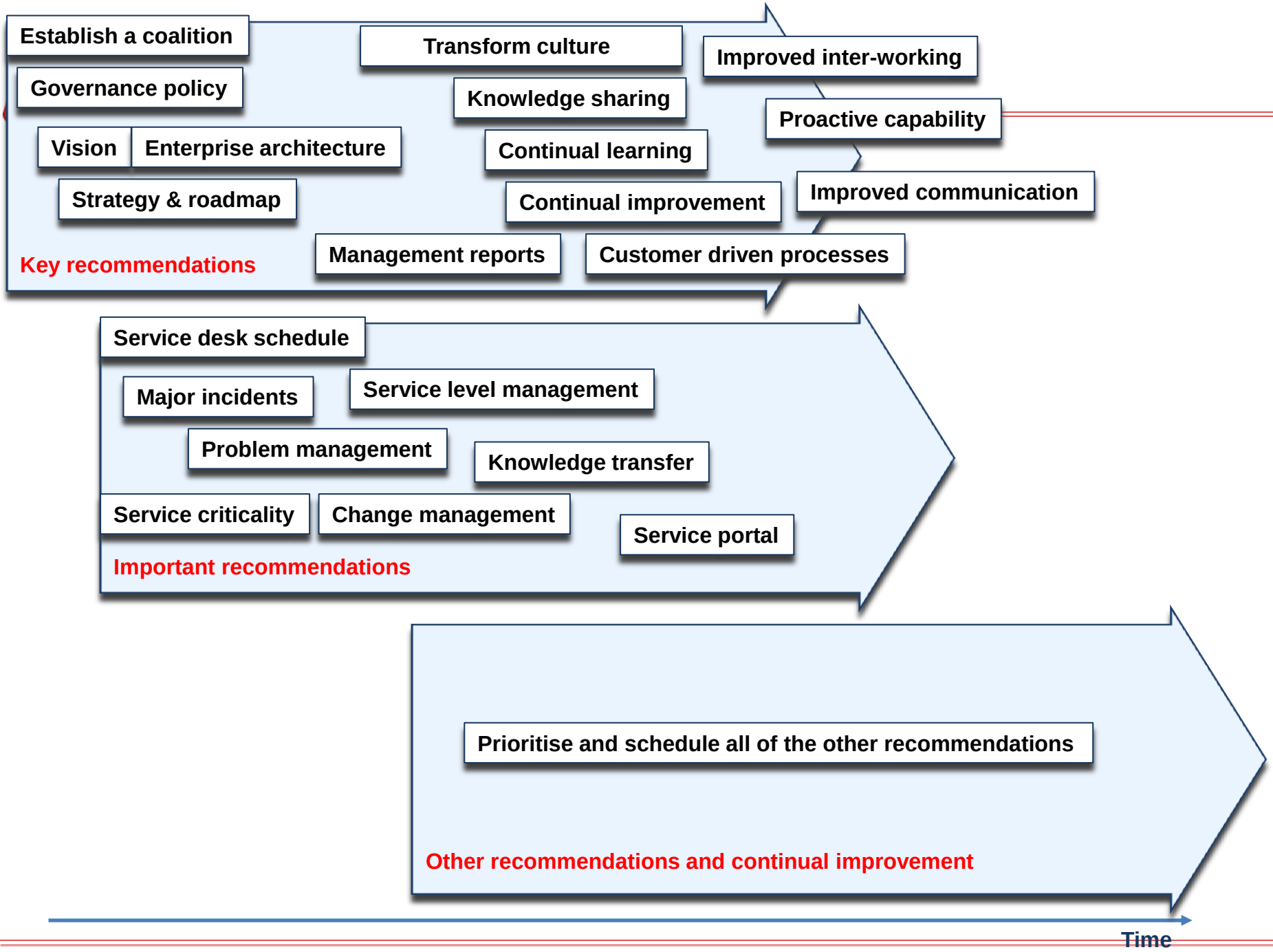
Vision and governance

- *A guiding coalition should be established to set objectives, direct and govern service management activities*
- *A clear and simple governance policy and architecture needs to be established and made visible. The architecture needs to cover the governance of services and what metrics and KPIs will be used*
- *There needs to be clear communication of the vision and the governance approach to all areas*
- *A set of management reports need to be developed that underpin the needs of the governance policy and architecture together with a top level scorecard or dashboard*

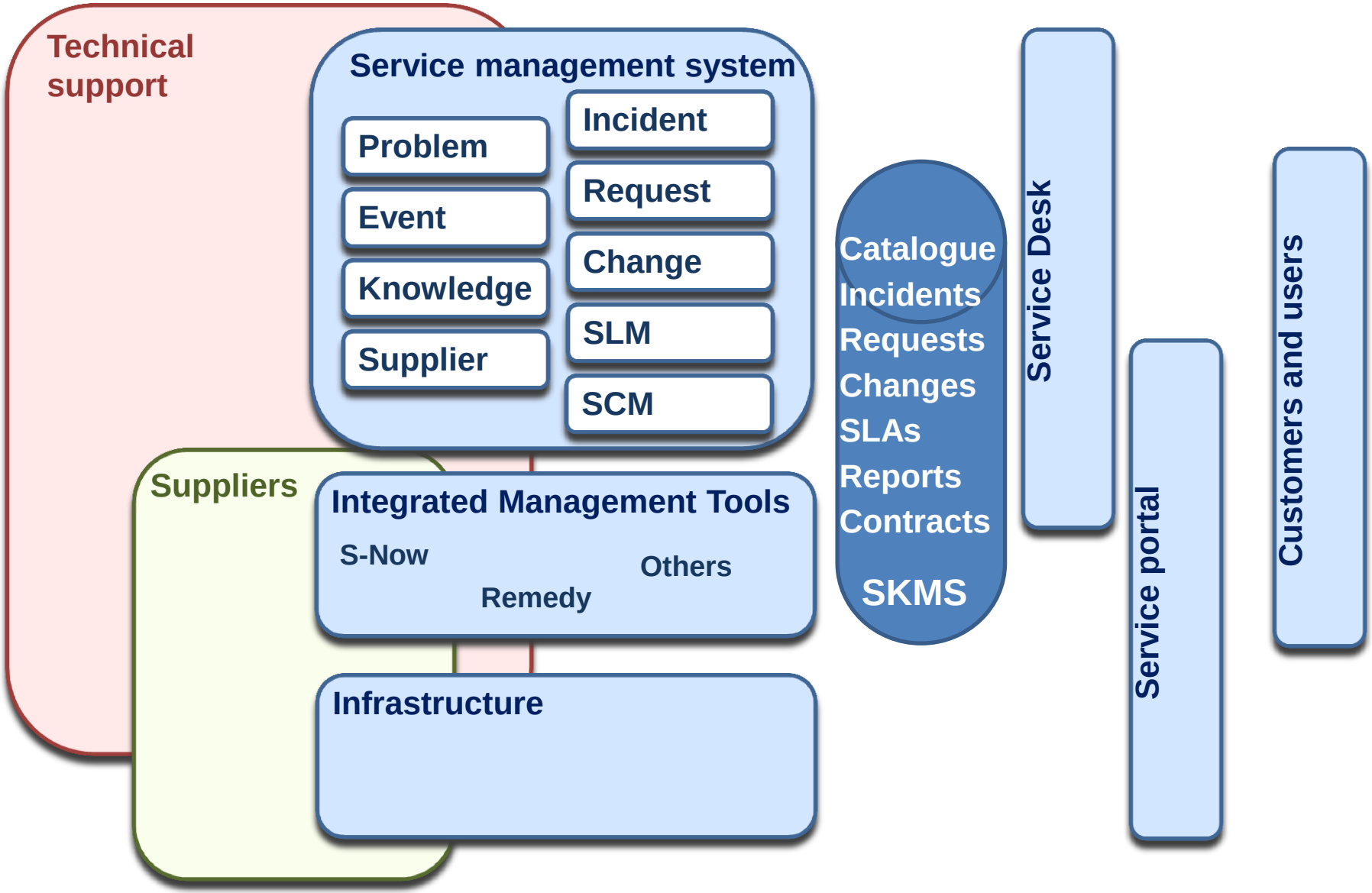


Strategy and steering

- *A clear and simple strategy and roadmap need to be developed and publicised for service management activities*
- *The vision and strategy should contain clear commitment to develop a business, customer, service and quality focus*
- *IT and GS need to seek ways of being more proactive and receptive to change and incorporate an appropriate level of agility within the activities and processes*
- *The service catalogue needs to be extended and developed into a service portfolio and architecture*



Service management architecture



Processes

- *All of the processes should be developed to a level of three*
- *Ensure service management principles are appropriately adopted and applied to automated and repeatable processes*
- *Ensure that wherever possible the service catalogue is used by all processes to ensure that consistency is achieved*
- *Extend the service catalogue into a service portfolio*
- *Establish clear and consistent processes for the prioritization and commitment of resources to services*
- *Adherence to processes should be encouraged with consistent measurements and improvement from a customer perspective*
- *An overall continual improvement approach should be adopted with a central improvement register*

People

- *An overall continual learning approach should be adopted to the people within the scope of the SM project within CERN.*
- *The use of the knowledge management needs to be encouraged.*
- *Knowledge sharing and transferring need to be established as key principles within CERN, especially within support teams*
- *Where roles are documented and assigned, the role should be empowered with accountability and the activities completed.*
- *Most of the roles and process within IT and GS are reactive or at best active. Some resources need to be ring-fenced' to focus on developing a proactive capability in the people and the processes.*

Products and technology

- *An enterprise architecture, including a service architecture, should be developed and applied to all services, management areas and technology, within .the scope of the SM project. This architecture should also define a management tool architecture, establish an appropriate set of tools, plan the exploitation and integration of management tools and automate interfaces wherever possible.*

Culture, service and attitude

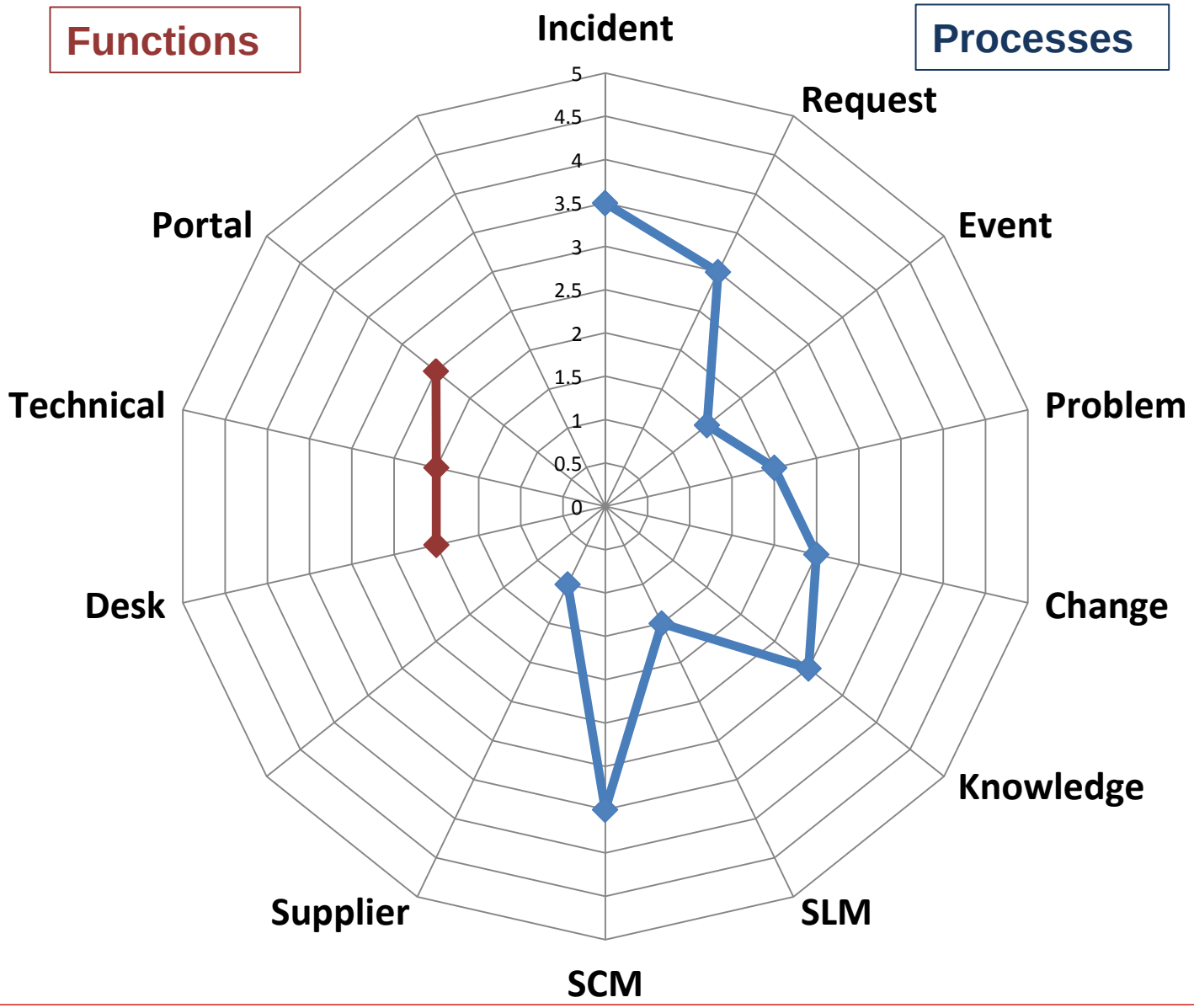
- *Develop, implement, publicise and commit to transforming the focus from technology and products and continue to establish a business, service and customer focused culture with more active and proactive operational capability.*
- *Define and establish accountability as a consistent way of working especially with regards to service value, end-to-end service and customer service, throughout GS and IT*
- *Ensure that service management processes are effective and appropriate and are driven by customer and business needs, impact and priority.*
- *Continuously re-enforce the message that knowledge sharing and the use of consistent, repeatable processes are necessary to deliver business value and agility and service quality.*

Organisation, communication & relationships

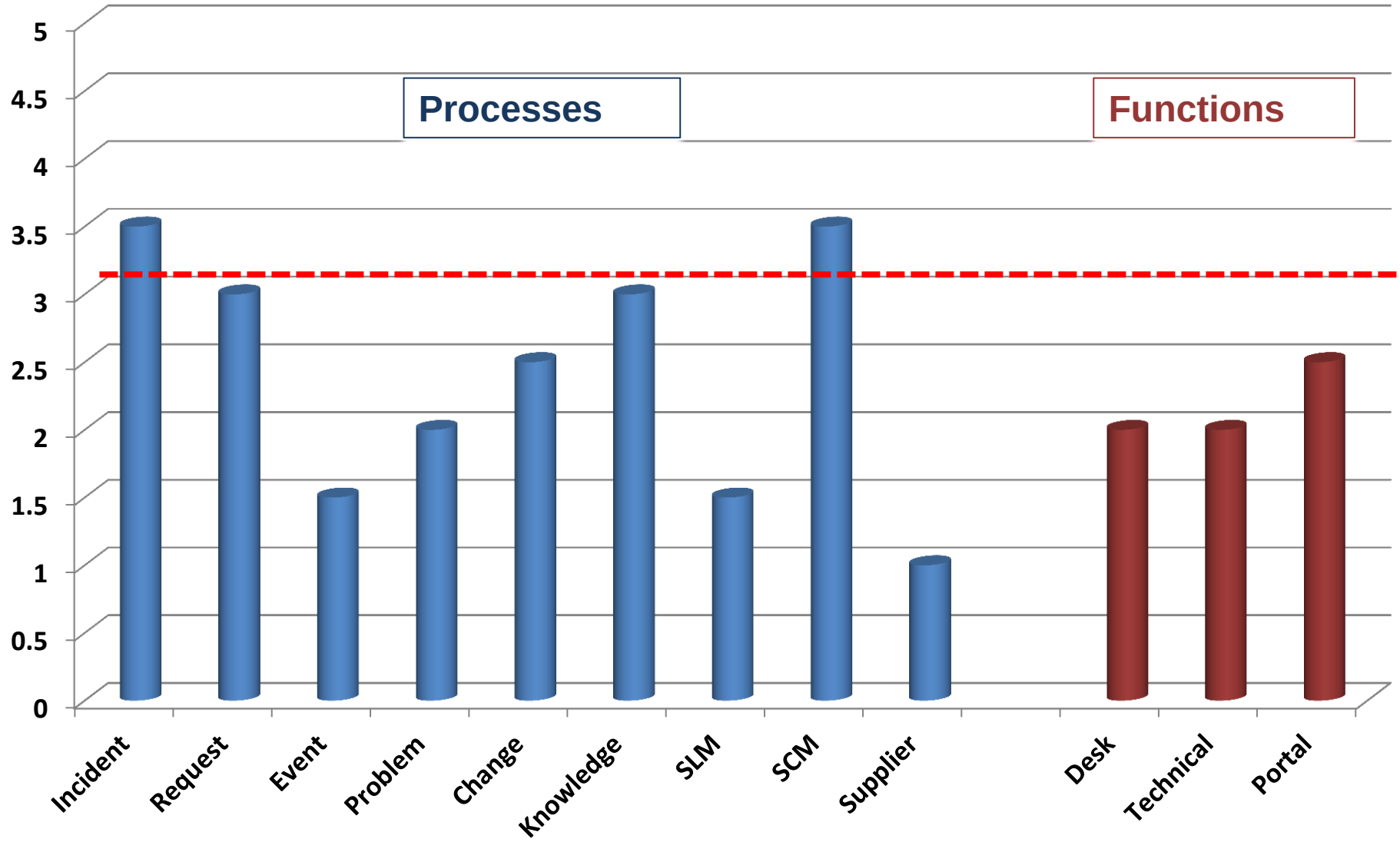
- *Establish improved opportunities for inter-working and information and knowledge exchange between all groups*
- *Establish clear roles, contracts, agreements, accountability, structure and interfaces*
- *Establish a supplier management process for managing established GS and IT suppliers and develop improved consistency, relationships and inter-working with key partners.*
- *Implement improved communications processes*
- *Try and encourage greater use of a single centralised service desk for all services, customers and users*
- *Establish a set of proactive resources to focus on the improvement of active and proactive capability*

DETAILED FINDINGS - PROCESSES

Functions and processes



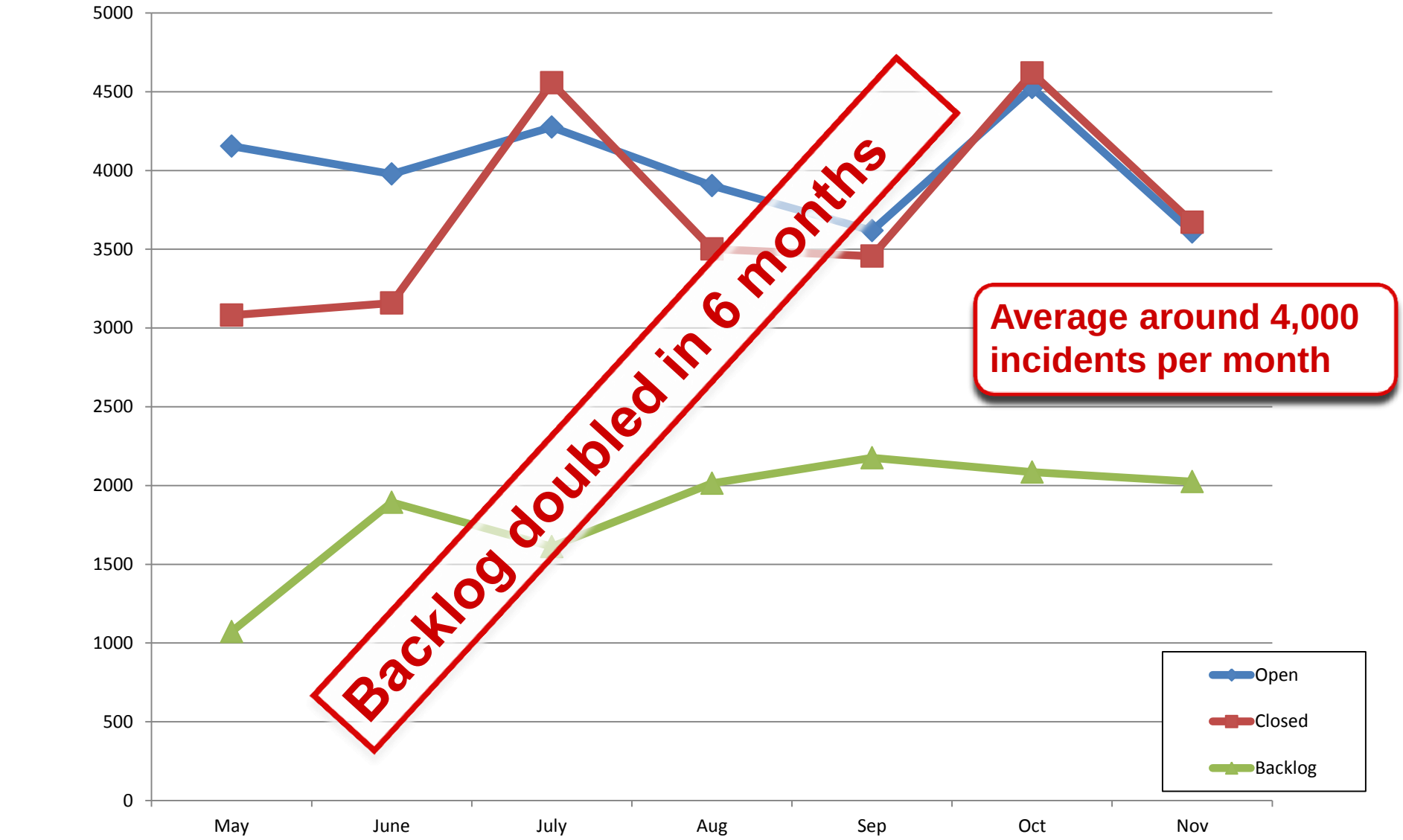
Functions and processes



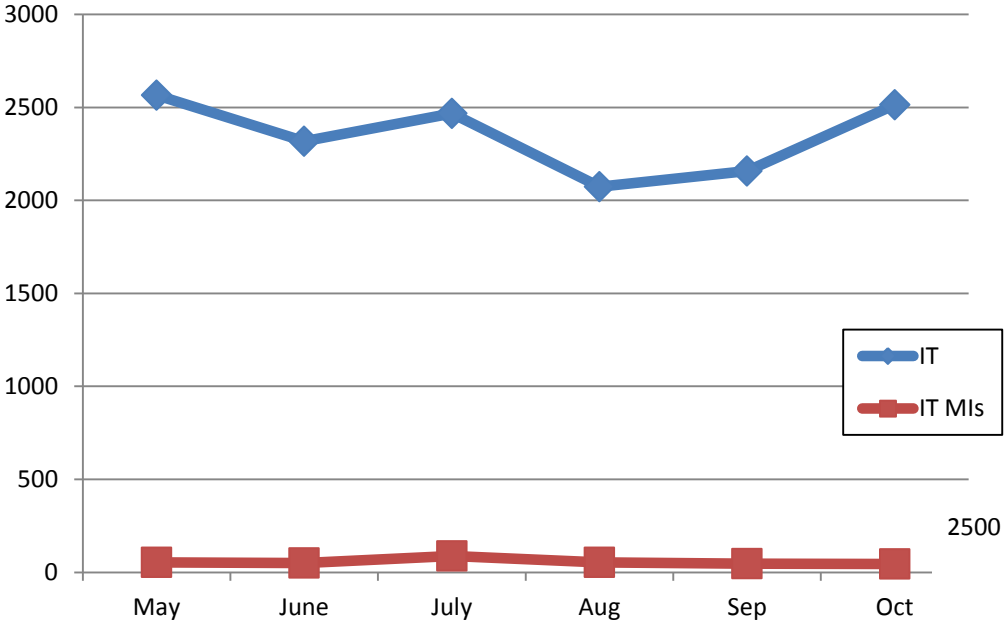
Incident management (3.5)

- *There is a documented process with a process owner*
- *All incidents recorded and linked to services (S-Now)*
- *Classification of major incidents automated*
- *No threshold on the reassignment of incidents*
- *No identification of incidents causing service outage*
- *Issues with reporting especially from the telephony system*

Total numbers of incidents



Incidents and major incidents

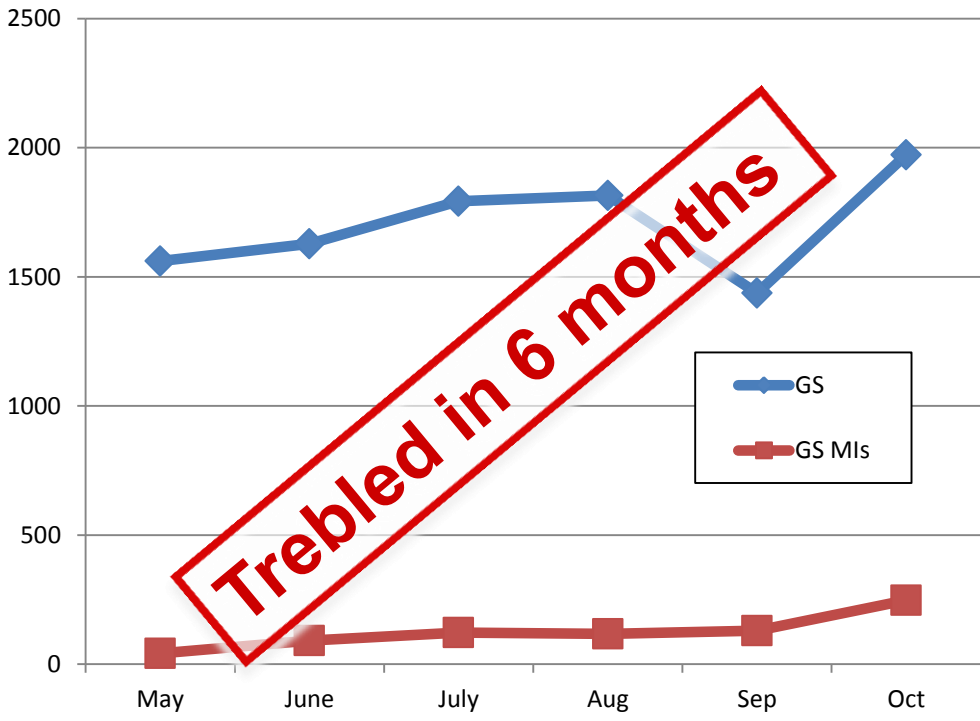


IT incidents and major incidents

Average around 55 MIs per month (max 89)

Average around 125 MIs per month (max 250)

GS incidents and major incidents



Service request fulfilment (3.0)

- *There is a documented process with a process owner*
- *All requests recorded (S-Now), mainly raised by users*
- *Self service menu for users to raise a request*
- *There is no automated approval of requests*

Service requests

Event management (1.5)

- *There is no documented process and no process owner*
- *Many of the management tools are integrated with the old Remedy tool , but have not yet been integrated with the S-Now*

Problem management (2.0)

- *There is no documented process and no process owner, although a process is being developed*
- *There are some problem management activities within individual support teams*

Change management (2.5)

- *There is no documented process and no process owner, although a process is being developed and a workshop has been held on the proposed process*
- *The proposed process is being used for all service management changes*
- *Release and deployment is part of the change management process and is currently being performed by some support teams*

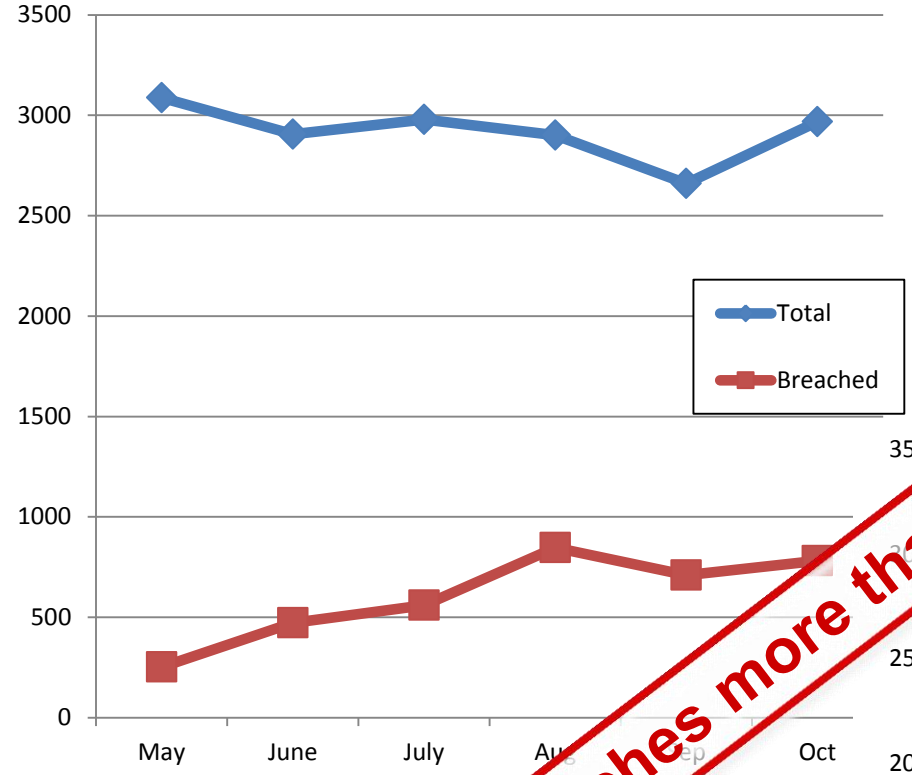
Knowledge management (3.0)

- *There is no documented process and no process owner*
- *There are many IT 'knowledge articles' within the existing knowledge base, but there are few on GS*

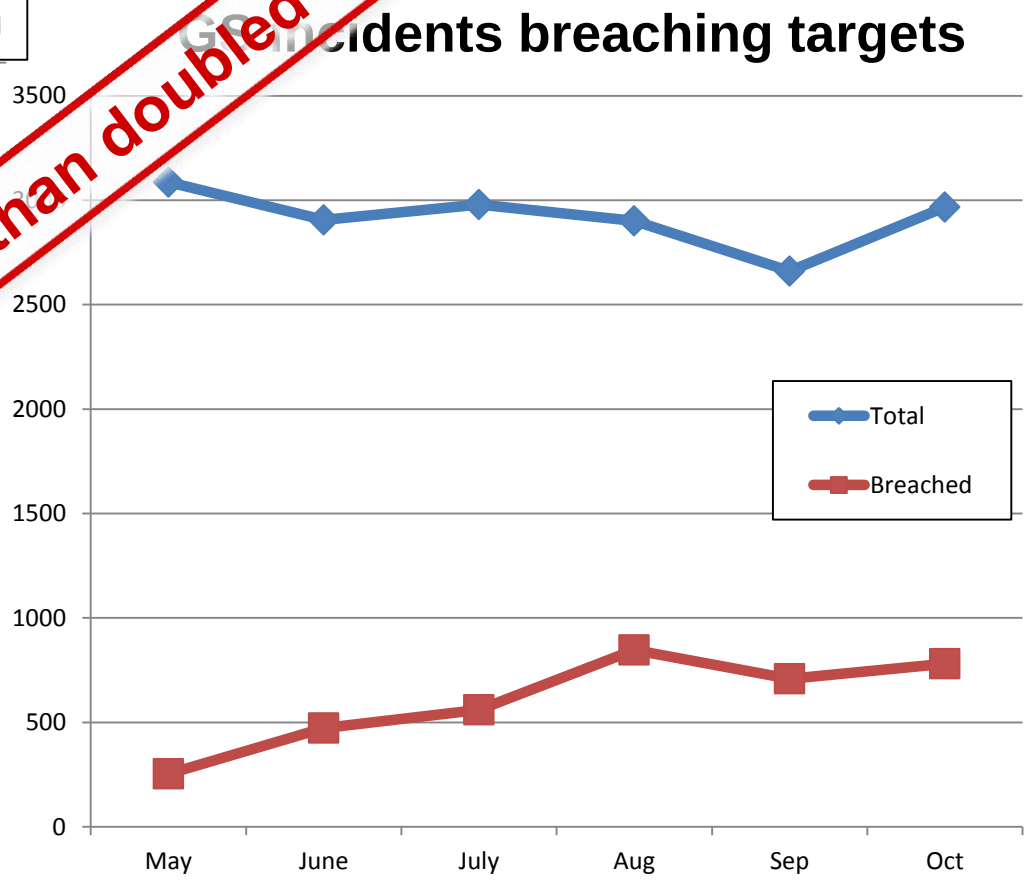
Service level management (1.5)

- *There is no documented process and no process owner*
- *Some agreements and targets exist for incidents and requests, but these are not committed to by all support groups*

SLA – target breaches



IT incidents breaching targets



GS incidents breaching targets

Number of breaches more than doubled in last six months

Service catalogue management (3.5)

- *There is a documented process with a process owner*
- *The service catalogue contains around 450 technical services and 250 business services*
- *The incident management and service request processes use the services within the service catalogue*
- *Technical services are owned by groups and individuals, whereas business services aren't owned*
- *The service owner role is inconsistent*

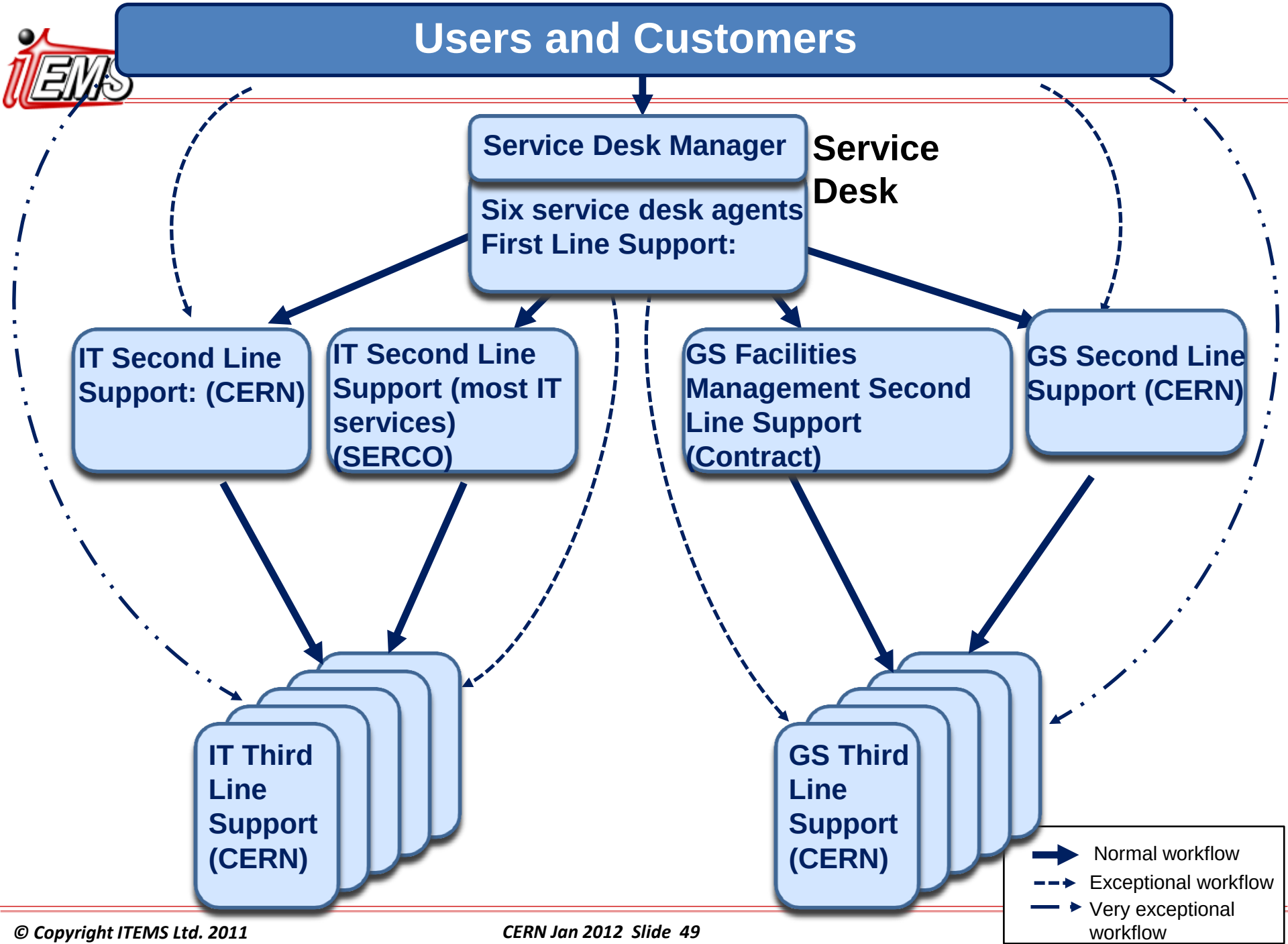
Supplier management (1.0)

- *There is no documented process and no process owner*
- *There is no consistent approach to the management of suppliers*
- *There is no real monitoring of supplier or contract performance*

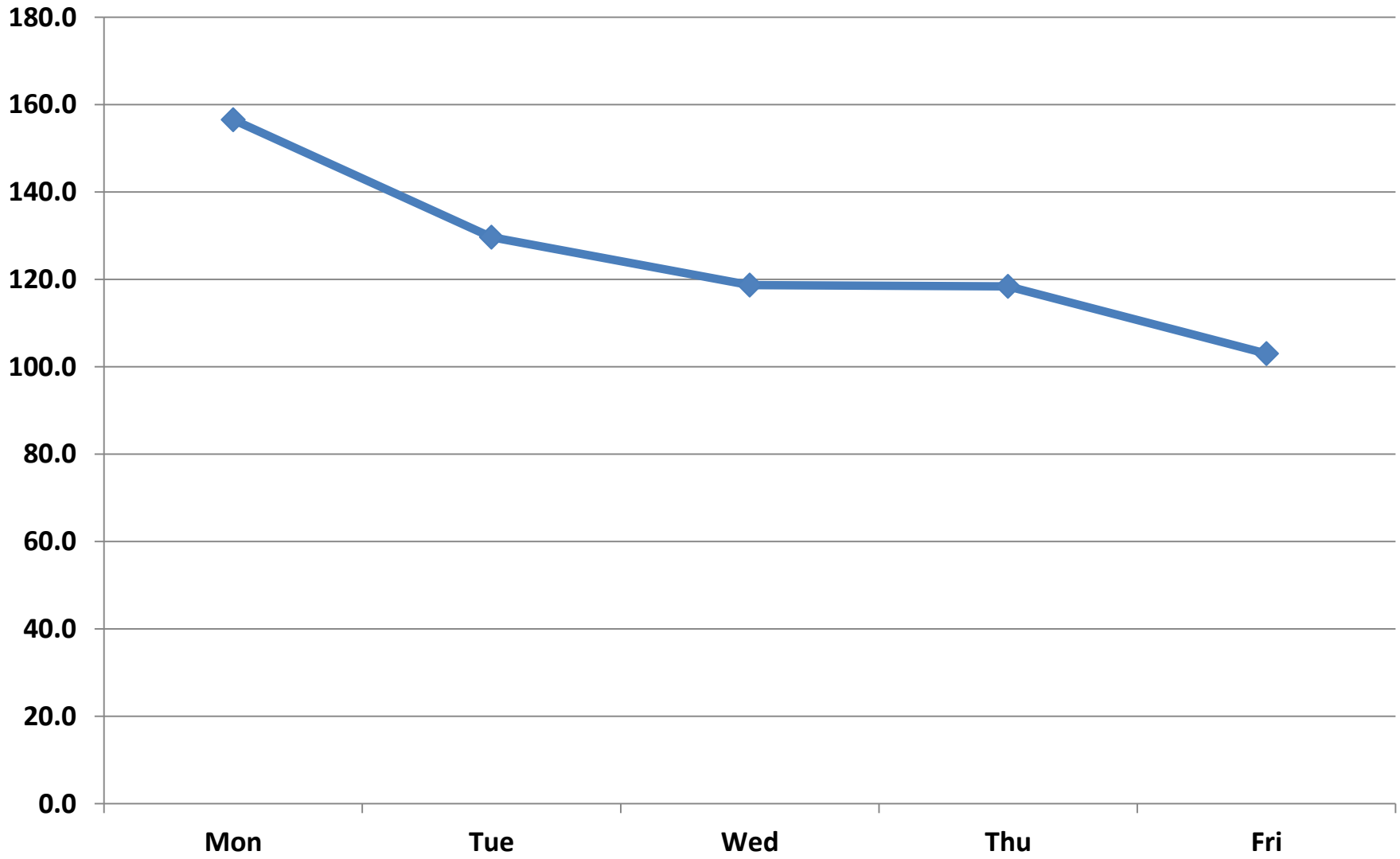
DETAILED FINDINGS - FUNCTIONS

Service desk (2.0)

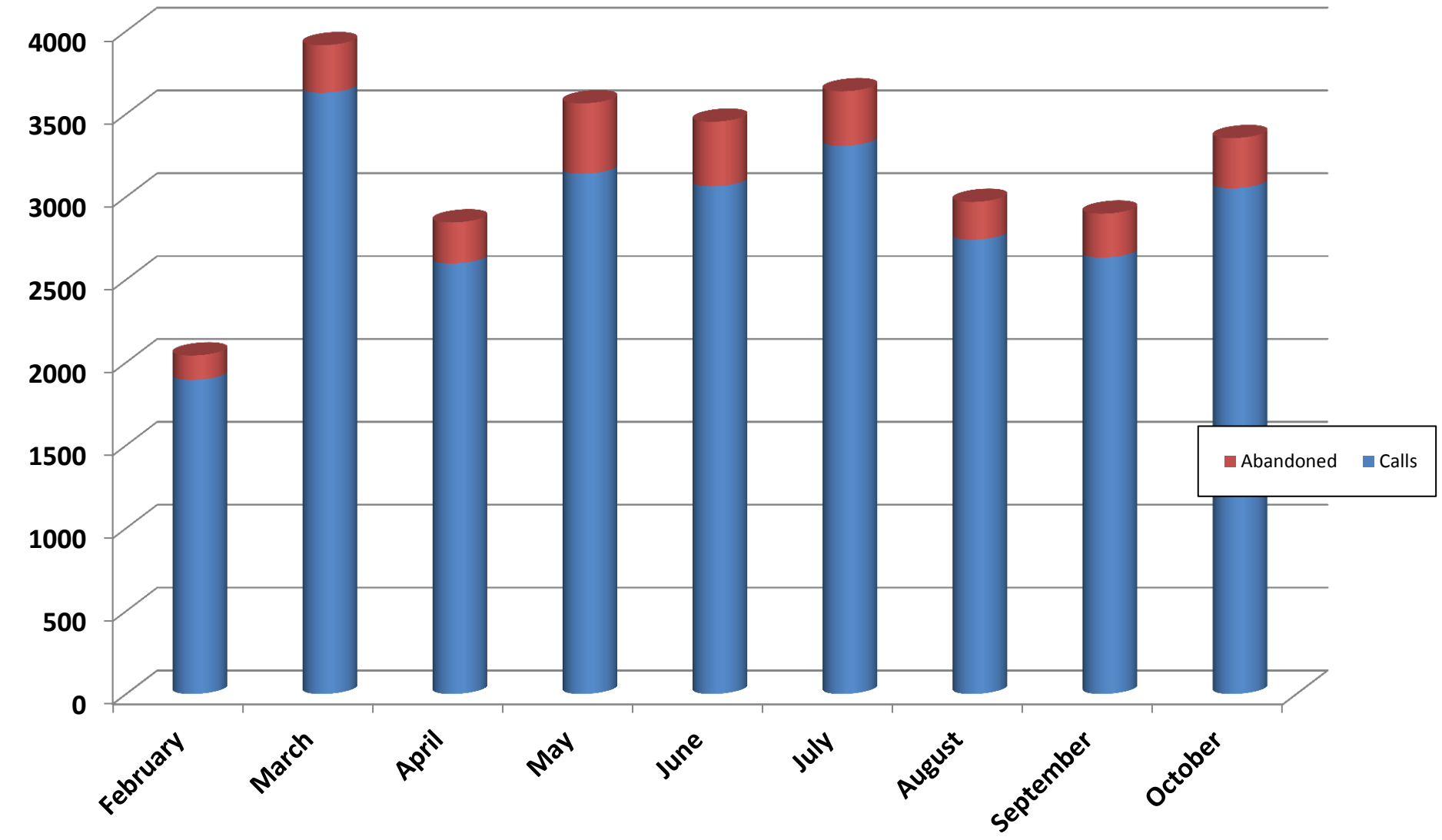
- *There is a well established service desk handling incidents and requests from phone, face-to-face, email, the service portal or proactively by support groups*
- *CTI is not used due to technical issues*
- *The ACD statistics are considered unreliable and are not generally used*
- *Little exchange of information between support groups*
- *There is only limited reporting*
- *Classification of incidents is automated and results in too many major incidents*
- *Service desk has recently been provided with a password reset script, which has significantly increased the number of incidents resolved by first line*



Weekly call profile



Calls and abandoned calls



Technical support (2.0)

- *Support groups are regular contacted directly by users and customers*
- *The quality of information in emailed incidents was poor and wasted a lot of effort*
- *Estimated 40-50% incidents resolved at first line, with 10-25% passed to third line*
- *Each support group has a person to manage the queue of incidents on a rota basis (different between groups)*
- *The quality and commitment of groups varies*
- *Confusion between the use of incidents, requests and changes*
- *Surprise at how well the new tool and processes work*
- *Escalation is an issue, especially out of hours*

Service portal (2.5)

- *Single point of information using browser interface and a self-service facility*
- *Generally well received and provides better quality information than emails*
- *Not really publicised*
- *Confusing to some non-expert users*
- *Together with the service catalogue has raised the profile of services*

DETAILED RECOMMENDATIONS

Incident management

- *Identify and produce key management metrics and reports*
- *Increase use of incident models, improve resolution of incidents*
- *Review the use of incident categories and classifications (MIs)*
- *Investigate the growth of major incidents*
- *Integrate incident management with problem management*
- *Improve the categorisation and resolution of incidents.*
- *Establish a threshold for reassignments, report and action*
- *Record incidents causing service outage and use as a KPI*

Service request fulfilment

- *Make greater use of request models for service requests.*
- *Consider automating the approval of requests with a link between EDH and S-Now.*
- *Encourage more people to use the service portal and S-Now for raising requests, rather than unformatted emails*

Event management

- *Document an event management process with an agreed process owner*
- *Integrate key management tools and technology areas (S-Now)*
- *Establish a management tool architecture*
- *Establish a single central 'event hub' and route events to (S-Now)*
- *A central alerting and alarming system for 24x7 operation for SM activities*
- *Wherever possible events should be categorised and automated action taken to prevent or resolve avoidable incidents.*

Problem management

- *Document a problem management process with an agreed process owner*
- *The process owner should work with the second and third line teams, to ensure consistent use of methods and techniques.*
- *Problem management should also work with incident management to:*
    - *Reduce the backlog of incidents*
    - *Regularly identify the top ten incidents and raise awareness of their resolution.*
    - *Agree the categorisation of incidents and problems and their analysis and reporting.*
    - *Measure, monitor and improve.*

Change management

- *The change management process needs to be agreed with an appointed process owner (pragmatic and practical approach)*
- *Standard changes and change models need to be developed to cover more than 80% of changes.*
- *The change management process should adopt an integrated approach for the deployment of changes by support teams.*

Knowledge management

- *Once the key service management processes have been implemented then examine the potential exploitation of the knowledge management system within S-Now*

Service level management

- *Develop and implement a SLM process and appoint a process owner and process manager for SLM.*
- *Identify key business and customer contacts and develop relationships*
- *Agree a business owner for each business service*
- *Implement processes for obtaining customer feedback on the level and quality of service delivered*
- *Use the key customer contacts to drive improvements*
- *Establish a key metric for measuring service quality*
- *Develop a simplified SLA template and targets (and OLAs)*
- *Investigate incidents breaching their resolution targets and implement remedial actions.*

Service catalogue management

- *Enhance the existing service catalogue with the value / criticality of each of the business service*
- *The service owners should assume accountability / responsibility for the all activities*
- *A business owner role should also be defined from the customer / user perspective*
- *Ensure that all processes use the information within the service catalogue to focus and prioritise processes and activities.*
- *Enhance the service catalogue with the additional missing services*

Supplier management

- *Document a supplier management process with an agreed process owner, covering the operational management of GS and IT contracts and suppliers*
- *Contractual targets of the service desk contract should be monitored, measured and reviewed.*
- *Regular service reviews should be held with representatives of key supplier organisations. Issues should be identified and a set of improvement actions implemented to rectify short falls in performance.*

Service desk .....

- *Monitor reassignments of incidents and implement a threshold*
- *Commitment and more consistent buy-in from second and third line support, especially within GS.*
- *Improve communication and inter-working between support groups.*
- *Improved integration of S-Now with other management tools*
- *Implement an SMS interface within S-Now for 24x7*
- *Greater integration between S-Now and mobiles for work orders*
- *Trusted users should be able to escalate issues with appropriate authorisation to a duty manager*
- *Resolve issues with classification of MIs and allocate MIs to duty manager who should assume the role of major incident manager*

Service desk .....

- *Complex contract, should be simplified with agreed*
- *SLA targets for incident resolution by all support groups need to be renegotiated and committed to*
- *CTI should be implemented between telephony and service desk*
- *The quality and consistency of measurements and reports*
- *Other areas and ways of providing the service desk with resolutions and workarounds should implemented.*
- *The first line resolution rate of the service desk should be measures, monitored and improved.*
- *A simple and effective recovery plan for the service desk should be implemented.*

Service desk

- *All of the service desk recommendations should be prioritised within an overall improvement plan and scheduled*
- *The 'idle time' lock out at the end of every call, should be reviewed and adjusted.*
- *Investigate the reasons for the low availability of service desk agents and the high level of abandoned service desk calls*

Technical support .....

- *Consider co-locating a member of each second line group to the service desk on a rota basis to improve the resolution rates*
- *Provide enhanced reporting to enable service owners to improve the quality of service they deliver*
- *An automated interface within S-Now should be provided to interface with other tools for tracking defects*
- *Encourage more users and customers to contact the service desk with r issues rather than contact support groups directly.*
- *Encourage users and customers to use the service portal or web interface to raise requests and incidents*
- *Negotiate more realistic SLA, OLA and contractual targets and encourage all support groups to commit to meeting targets.*

Technical support

- *Provide more information, examples and training on what is an incident, request and change and the right quality of information*
- *Review the use of notifications and 'chase e-mails'*
- *Review incident escalation processes and make them more public and accessible to a controlled set of users*
- *Reinforce the service owner role and provide easy access to the level of information required to perform the role effectively.*
- *Consider establishing business owners for all key IT and GS services, to improve information flows and decision making.*
- *Establish an overall schedule of change including dates for all major changes and projects.*

Service portal

- *Increase the value and content of the service portal, by for instance:*
  - *Displaying solutions to the ten most common incidents*
  - *providing access to service reports*
  - *providing updates on new facilities and achievements*
- *Try and encourage and promote the use of the service portal*
- *Encourage information on new services to be added*
- *Encourage submission of improvement suggestions from all areas*
- *Change the algorithm for calculation of the incident priority*

Service portal

- *Transfer the event and change workflows from Remedy to S-Now and retire Remedy and recoup the licence fees.*
- *The service portal should also be used to promote and encourage use of the preferred routes and processes*
- *Simplify the service portal interface and remove acronyms*

Summary

- *There is much good practice within IT*
- *There are enthusiastic personnel with good, skills, attitude and approach*
- *There is a good culture within IT of pride and an eagerness to do well*

Build on these by:

- *Establishing a virtual improvement team, strategy, roadmap and programme of improvement for the way forward*
- *Identifying the business requirements, areas of value, criticality, quality, good practice, gaps, duplication and waste*
- *Revise the organisation to support and facilitate the introduction of business focussed IT service management*
- *Prioritising all the recommendations and improvements, building and expanding good practice, identifying 'quick wins'*
- *Develop strong relationships and partnerships with the business and key suppliers*

Establishing a culture and process of continual improvement and learning, focussed on the delivery of high quality services and increased value

The Living Library

Thank you

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Any questions ?