DELIVERING ITSM FOR BUSINESS MATURITY

A Practical Framework

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BY

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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®.

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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.

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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.

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INTRODUCTION

Utopia comes to mind when I think about achieving Service Excellence through IT Service Management (ITSM) best practices. An environment where technology teams achieve a state of operation that promotes exceptional customer service and growth. For many, it is a dream to chase and for others, a reality. Multifaceted differences in business culture are ever changing and the best approach to ITSM is one that comes from practical business disciplines blended with an attitude toward embracing change.

The perception and idea of change is the cultural essence between achieving service excellence and chasing it.

As I wander far from reality, bring me home to the safety of change.

ITSM is receiving a lot of attention as a means to improve the customer experience, improve quality, and improve information integrity. For many of us in the industry, the thought of conforming to a common set of good practices in an unpredictable environment is perceived as nearly impossible. The raw truth about ITSM is this: if people don't accept the practices as part of business operations or conform to a unified model then there is no chance of succeeding with ITSM.

Rogue variants of processes and work instructions that are not aligned with formal documentation are another factor negatively impacting ITSM success. In these cases, methods used to build, deliver, and improve services are often performed differently than how higher-level management understands it. This scenario produces a high level of inconsistent results and an indicator of a divided operations model. This separation is common and causes issues such as:

- weak automation or too much automation on the wrong activities;

- missing or incorrect data;

- missed service-level targets;

- low customer satisfaction rates;

- high incident volumes and a high percentage of service failures;

- unplanned expenses or higher support costs; and

- lower productivity.

As a result, operational maturity is negatively impacted, which has a major impact to overall business maturity. A different variant of the same process will exhaust resources and inflate costs.

Unified work streams, centralized processes, quality process mapping, clear work instructions, business standards, controls, knowledge, and judicious policies are crucial to produce consistent results from an ITSM program. To be on a path to attain business maturity requires a practical framework and approach to ITSM. Formal frameworks for ITSM recommend centralizing technology processes; however, a flawed process design will create volume overloads, backlogs, and bottlenecks. It is wise to centralize technology processes;

however, process design needs to be solid for each one and have an emphasis on process touchpoints, interfaces to customers, and interactions with vendors. These are necessary to prevent workload backlogs and long wait times for customers. A layered model works best for ITSM to assure growth and business maturity. If maturity is weak, then there will be lines of separation between business and technology units inhibiting growth. Technical issues worsen when lines of separation exist between technical units. It's an invisible, yet powerful line and creates unmanageable chaos in the organization.

My approach in this book stems from practicality combined with formal ITSM frameworks and standards that are required to run a business. Practical ITSM came to me while studying yoga philosophy and science. It prompted me to examine the struggles I faced in my work when I realized published versions with ITSM guidance only went so far. Yoga studies led me to compare yoga science to service management principles and applied them to technology and business management. Here's a simple explanation for it. Yoga has eight limbs in its system and it provides guidance to care for the self. Yoga guidance is based on practical theory and science for one to reach a higher state of awareness and enhanced vitality in the body. I thought "why not use this practical basis to reach awareness and enhanced vitality in business through technology services."

In the Authentic Service Progression, business and technology are not seen as separate entities. Practical ITSM transforms an IT unit to a strategic collaborator. Service management has been around long before the client server age. The struggle with ITSM, as I see it, is from managing services with a technical interpretation. It doesn't work effectively and, in most cases, doesn't work at all. Business leaders and technology leaders should be united on missions where service delivery is inclusive to running the business. Historically, leaders in IT

have their own way of bypassing processes and policies that are cumbersome. This tactic slows business maturity. The days of separation are distant past and it's time to bring IT **in** the business and put to rest any outdated views. Technology isn't separate from the business; it is a strategic force necessary to running the business. Organizations that have exceeded with ITSM understand this. Organizations that still maintain individual technology towers (silos) or lack a cohesive layer to join silos together is weak functionally. The cohesive approach putting people first helps to master business maturity through practical ITSM.

Over time, technology professionals learned that it isn't as easy as it sounds to achieve IT service management excellence. Getting started is the trickiest part or it can be the polar opposite where getting started is oversimplified. The starting point isn't always clear. The flow of activities has no beginning and no end. Planning and timing with a clear and unified vision is the best way to begin a successful ITSM journey for the best results. The end result is what the organization expects to happen from implementing ITSM methods.

It is necessary to have business commitment because without it there is no lifeline in adopting any form of ITSM. Once a business decides to move to a more practical structure for ITSM and shift from technical to business details, the business will be a cycle of ongoing maturity. The results improve substantially. At the risk of sounding cliché, it never ends!