Service Management, as well as Financial Management and Operations Management, is an integral component of ITIL and ISO/IEC 20000 best practices.

This document will provide a foundation for organizations to understand and prepare for implementing best practice processes associated with the management, delivery, and support of communication and technology services. Service Management encompasses the suite of processes that focus on production operations management. Maintaining a centralized Change Management Database (CMDB) is fundamental to implementing a Service Management program. Service Management is an integral facet of the internationally accepted best practice processes defined by the Information Technology Infrastructure Library (ITIL) and the International Organization for Standardization International Electro technical Commission (ISO/IEC 20000). This document outlines lessons learned to help organizations implement an effective and appropriate Service Management program.

Concepts and Definitions

The Service Desk is a function that is supported by many underlying best practice support processes.

The fundamental function within Service Management is the Service Desk. The processes that make up the day-to-day transactions of the Service Desk include managing service requests and repairs and releasing major changes. The definitions below provide clarification for the Service Desk function and underlying processes.

Service Desk - The primary function that facilitates the interface between the customer and the service. The Service Desk is comprised of all the underlying Service Support and Service Delivery processes. The Service Desk is governed by a set of common processes, procedures, terminology, and classifications.

Service Catalog – The method used to communicate service choices to customers. Ideally, the Service Catalog can be used to streamline the workflow process by presenting customers with service request menu options.

Configuration Management – The processes and technologies associated with tracking the configuration and inter-relationships of all provisioned services and related distributed assets in a centralized (CMDB).

Incident Management – The processes that restore services to normal operation as quickly as possible. Incident Management focuses on minimizing the adverse impact on business operations by ensuring that proper levels of quality and availability are maintained. The spectrum of processes involved in Incident Management range from high frequency service requests to resolution of service problems. A few

Concepts and Definitions (con't)

examples include the activation, upgrade, disconnection, or repair of a service.

Problem Management – The implementation of reactive and proactive measures to minimize the impact of incidents and problems. A key facet to Problem Management involves performing statistical analysis in order to make corrections and prevent recurrence. A good example involves managing the Mean Time To Repair (MTTR) of services by type, location, organization, and support group.

Change Management – The processes that ensure that consistent standardized methods and procedures are used to minimize the impact of incidents and mitigate business continuity risks. Examples include planning the upgrade of a network support device or upgrading a widely used software application.

Release Management – Are the processes that focus on protecting production operations through use of formalized procedures and continual checks of changes to service configurations via planning, testing, and scheduling releases. Release Management involves the actual execution of the planned change and all the necessary follow-up activities.

Call Center versus Help Desk versus Service Desk

The focus of the Service Desk is to provide all the means necessary to manage the lifecycle of the incident and successfully complete the requirements in the most timely and efficient manner possible.

The main objective of the conventional Call Center is to establish a professional procedure to handle high volumes of calls. Call Centers are usually not staffed with technical resources to resolve issues or facilitate service requests. The purpose of the traditional Help Desk is to manage, coordinate, and resolve incidents as quickly as possible and to ensure that no request is lost.

The Service Desk extends the breadth of services and offers a more globally-focused approach, allowing business processes to be integrated into the Service Management infrastructure. It not only handles incidents, problems, and questions, but also provides an interface for other activities such as major customer change requests, maintenance contracts, software licenses, Service Level Management, Configuration Management, Availability Management, Capacity Management, Financial Management, and Business Continuity Management for technology services. Many Call Centers and Help Desks naturally evolve into Service Desks to extend the spectrum of services and improve customer satisfaction to the overall organization.

Service Catalog – The Centerpiece of the Service Management Process

A comprehensive Service Catalog can enhance service support functions, as well as the end-user's experience.

The most evolved implementations of a Service Catalog go well beyond a customized menu of customer options; it actually provides a modeled view of provisioned services, real-time costs, and a historical perspective of service usage. The Service Catalog can improve communication between service support units and business users by providing insight into the interdependencies of provisioned services and related assets. The most complete Service Catalogs provide business metrics, contracts including Service Level Agreements (SLAs), and core asset data affiliated with provisioning new services to fit day-to-day dynamics in shifting business requirements.

Common Business Challenges

The key to planning and sustaining an effective Service Management Program is understanding the interdependencies of service support personnel, physical resources, and assignments.

An organization will recognize sustained benefits from a Service Management program if it can relate to any of the common business challenges outlined below:

- Inability to verify accurate and timely configuration of services to support operations
- Lack of automated structured workflow
- Inability to quickly analyze history of related issues
- Inconsistent recording of transactions with insufficient capabilities to properly categorize incidents
- Lack of automated governance for assignments and escalations
- Limited or no visibility into lifecycle of process for customer and/or support personnel
- Lack of insight into availability of hardware/software/personnel resources to properly estimate resolution
- Lack of automated audit trail on complete lifecycle of transaction
- Inability to obtain timely insight into open and closed incidents
- Incomplete information to conduct an accurate and timely assessment on impact of resolution
- Lack of enterprise Service Catalog
- Lack of notification processes
- Inadequate or insufficient methods to communicate scheduled changes to customers
- Lack of definitive enterprise software library (DSL) or Change Management Database (CMDB)
- Lack of governance to ensure only secure, tested, and authorized releases are deployed
- Lack of audit trail to review cause-effect of changes

Conducting a Self Assessment

The key to starting any initiative is understanding organizational goals and being able to measure the return on investment (ROI).

The table below provides some assistance to help organizations assess the effectiveness of their respective Service Management program.

Maturity Level	Common Characteristics of a Service Management Program
0 – Absence	No enforcement, governance, or documentation of configuration items and/or service request processes; evident by questionable integrity of data. Incidents are managed via personal contacts.
1 – Initiation	Resources are allocated to support processes. Inconsistent and/or inefficient methods for classifying resolutions. Extensive reliance on manual data entry. No enforcement to force updates of a central Change Management Database (CMDB)
2 – Awareness	Separate non-integrated technologies for managing incidents, problems, and changes. Inability to correlate effects of scheduled releases to changes in incidents and problems. Completing a complex transaction requires lookups into multiple systems.
3 – Control	The roles, responsibilities, and authorizations that support the production processes are well defined and enforced. Key Performance Indicators (KPIs) such as Mean Time to Activate (MTA) and Mean Time To Repair (MTTR) are established to measure the effectiveness of the program and guide its continued improvement. No tuning or optimizing to maximize use of resources.
4 – Integration	Integrated technologies are employed to leverage efficiencies via automation. Processes that support the provisioning and resolution of service disruptions are consistent and repeatable. Consistent levels of quality delivery and control are prevalent. There is regular formal communication between the managers and personnel of the various support operations who are working to support different processes (e.g. provisioning, inventory, cable, workforce, etc.). Key Performance Indicators (KPIs) are established to measure inter-process effectiveness. Quality and performance metrics are shared between processes.
5 – Optimization	The processes are recognized as critical enablers to improve the effectiveness of the business. Activities and processes are directly linked to corporate objectives. Assessments are used to drive innovation and improve organizational effectiveness. Management is made aware of performance via automated delivery of performance reports.

What, When, Why and How to Implement

The scope of the Service Management Program implementation depends heavily upon your business requirements and current processes.

The implementation of Service Management best practices does not necessarily guarantee a more effective and efficiently run organization. Organizations should only implement processes and functions that support their respective business requirements. The degree of the investment should be gauged on the cost-benefit of the initiative. Technology is only an enabler. For instance, small organizations may not have a need for formalized processes like Change Management Board especially if only a few people are responsible for supporting and delivering services.

Measuring Success

The ability to establish milestones of success will enable a growing program that is accepted by the entire organization.

The key to achieving success is establishing "SMART" objectives. The purpose of the "SMART" framework is to define the immediate priorities of the organization and make sure the implementation is properly aligned with the corporate mission. Each initiative to improve the Operations Management program should have clearly defined objectives. "SMART" objectives satisfy the following criteria:

1. Specific to implementation milestones
2. Measurable against value achieved
3. Appropriate to the customer's requirements
4. Realistic to substantiate ROI and timeframe
5. Time-bound to establish when and how

Some good examples of SMART objectives for measuring the effectiveness of a Service Management program include the ability to:

- Verify service configuration against support operations
- Correlate service support personnel with physical resources and assignments
- Automate service management workflow, including assignments, allocations, and reporting
- Audit transactions' complete lifecycle
- Improve MTA by 10%
- Provide customers with visibility into service requests and trouble tickets