

Building a Service Catalog:

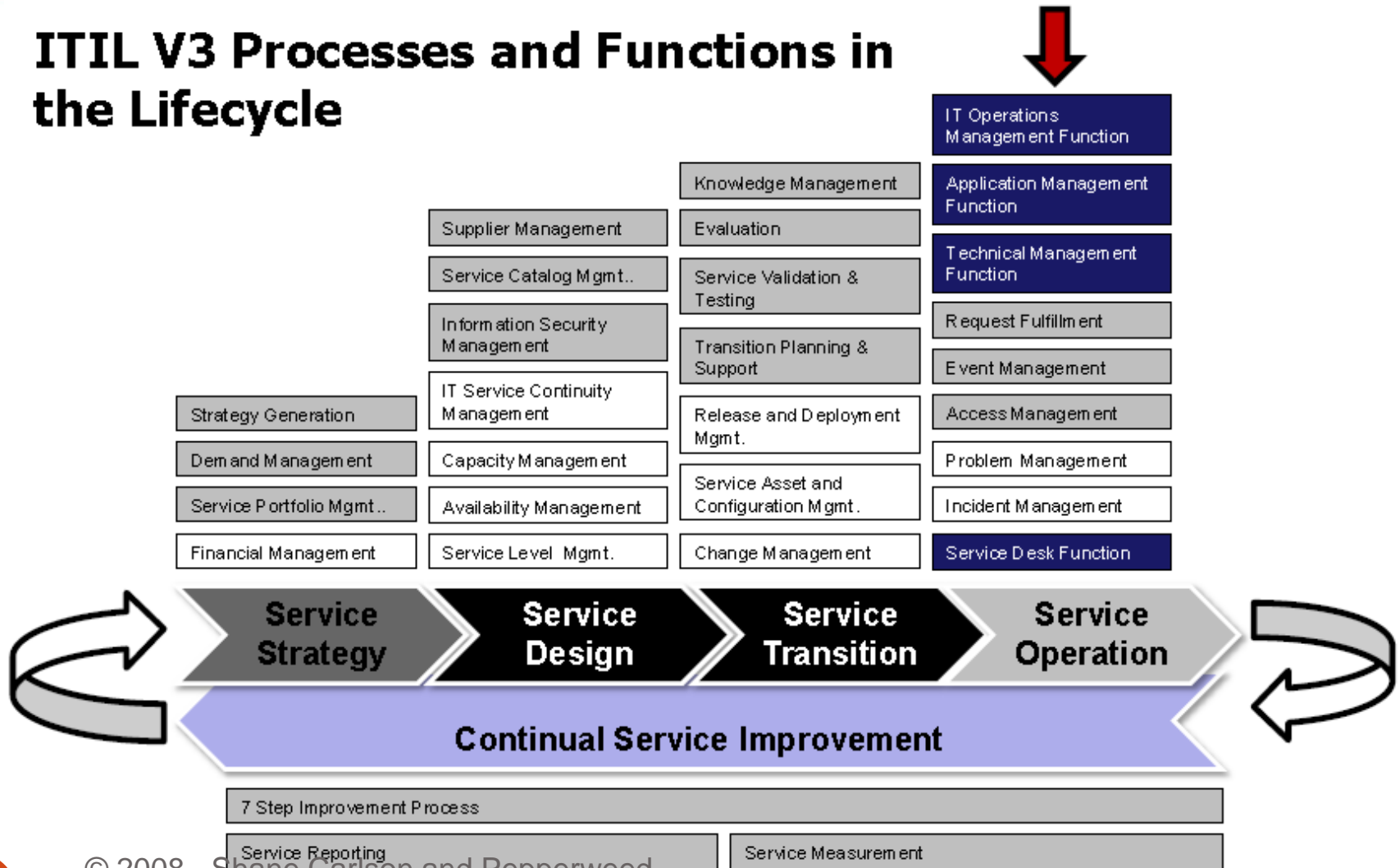
A Practical Approach to get to an Actionable State with your Service Catalog - Part 1

15 October 2008

Agenda

- 2:30 – 2:45 Introductions and Overview
- 2:45 – 3:45 Service Catalog Overview
- 3:45 – 4:00 Break
- 4:00 – 5:00 Exercise: Building a Service Catalog Structure
- 5:00 – 5:30 Review and Q&A

ITIL V3 Processes and Functions in the Lifecycle



The Service Catalog before ITIL V3

- Very little guidance on the subject
 - One paragraph in the SLM section
 - No ideas on how to get started and where to go for info
- No practical knowledge
 - No examples of what a service catalog should look like
- No clear vision of the end result
 - How can you be successful when you don't know where you are going?

What is a Service?

A described set of facilities, IT and non-IT, sustained by the IT Service provider that:

- Fulfills one or more needs of the customer
- Supports the customer's business objectives
- Is perceived by the customer as an coherent whole

Source: Pink Elephant

What is a Service Catalog?

“Service Level Management will document the services provided to the Customers, detailing the key features of those services, preferably within the CMDB (configuration management data base). This catalog will form the basis for an understanding of all the services offered, their components, features, charges, etc.”

Source: IT Service Management Pocket Guide Version 2, iTSMF, © 2001



ITIL V3 – What does it look like?

- **Service Strategy**
 - Covers strategies, policies, Service Portfolio Management, Financial Management.
- **Service Design**
 - Policy, planning and Implementation and the core processes of Availability, Capacity, Continuity, SLM and Outsourcing. Also includes some Information Security management topics.
- **Service Transition**
 - Service Knowledge Management (enhanced and improved approach to the CMDB), planning and support, Change Management, Release and Deployment Management.
- **Service Operations**
 - Focus on Incident, Service Request (newly separated from Incident), Problem, and Operations Management.
- **Continual Service Improvement**
 - Incorporating the “Plan, Do, Check, Act” mechanism that is standard fare with most process improvement methodologies like Six Sigma, etc.

Where ITIL V3 Does it Right!

- Dedicated Service Catalog section in the Service Design book
- Service Catalog Management considered a “Core Process”
- Service Portfolio Management defined
- Service Request management added as a discrete process (Service Operations)



Services Defined

- IT Service —
 - *“A service provided to one or more Customers by an IT Service Provider. An IT Service is based on the use of Information Technology and supports the Customer’s Business Processes. An IT Service is made up from a combination of People, Process and Technology and should be defined in a Service Level Agreement”*
- Business Service —
 - *“An IT Service that directly supports a Business Process, as opposed to an Infrastructure Service, which is used internally by the IT Service Provider and is not usually visible to the Business”*
- Infrastructure Service —
 - *“An IT Service that is not directly used by the Business, but is required by the IT Service Provider so they can provide other IT Services. For example directory services, naming services, or communication services.”*

All definitions from: ITIL “Service Design” book © Crown Copyright 2007 (OCG)

Service Catalog Defined

“The Service Catalogue provides a central source of information on the IT services delivered by the service provider organization. This ensures that all areas of the business can view an accurate, consistent picture of the IT Services, their details and their status. It contains a customer-facing view of the IT services in use, how they are intended to be used, the business process they enable, and the levels and quality of service the customer can expect from each service”

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Key Highlights of the Service Catalog

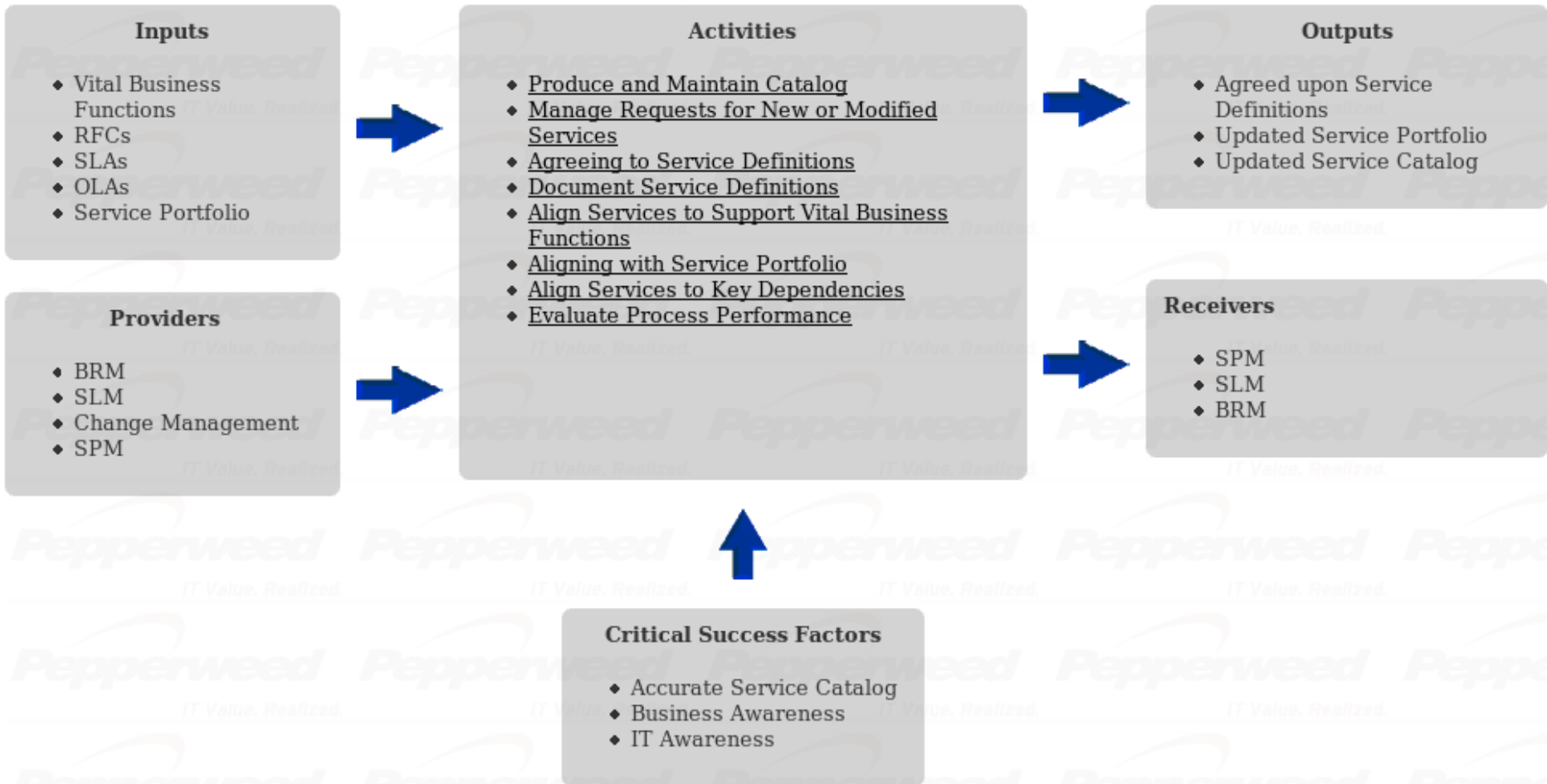
- Well defined Service Catalog Management process
- Role of the Service Catalog in relation to other key processes better defined
- High level KPIs and CSFs defined
- Delineation between Business Services and Technical Services

Service Catalog Management Process

- According to ITIL:
 - The goal of the Service Catalog Management process is to ensure that a Service Catalog is produced and maintained, containing accurate information on all operational services and those being prepared to be run operationally.

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SCM Process Diagram



IT Service Portfolio Management

- Service Portfolio —
 - *“The complete set of services that are managed by a Service Provider. The Service Portfolio is used to manage the entire Lifecycle of all Services, and includes three Categories: Service Pipeline (proposed or in development); Service Catalogue (live or available for Deployment); and Retired Services.”*
- Service Portfolio Management —
 - *“The Process responsible for Managing the Service Portfolio. Service Portfolio Management considers Services in Terms of the Business value that they provide.”*

Definitions from: ITIL “Service Strategy” book © Crown Copyright 2007 (OCG)

The IT Service Portfolio: “The Business End of ITIL”

- Targeted at Business Leaders
- Describes Services and how they are used to enable Vital Business Functions
- Focuses on services and the value they provide to the Business
- Also can be used as a basis for prioritizing key Business Services

Service Request Management (Request Fulfillment) in ITIL V3

- Service Request –
 - *“A request from a User for information or advice, or for a Standard Change or for Access to an IT Service. For example to reset a password, or to provide standard IT Services for a new users. Service Requests are usually handled by a Service Desk, and do not require an RFC to be submitted.”*
- Request Fulfillment
 - *“The Process responsible for managing the Lifecycle of all Service Requests.”*

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Service Request Management (Request Fulfillment) in ITIL V3 (cont)

- Requests are initiated by customers via the Service Desk (or preferably it's automated proxy)
- Should be linked to associated Incidents, Problems or Changes as appropriate.
- Process should be aligned to Release, Asset, and Configuration Management where appropriate.

Where ITIL lacks in details:

- ITIL V3 is much improved over previous versions
- ITIL is a guideline of Strategic IT best practices
- Key details of making your Service Catalog actionable are still missing
- What do you do?

The Service Catalog

- The Service Catalog is the mechanism by which you document and manage IT services.
- Services must be presented in terms that are familiar to the customer.
- The Service Catalog must be actionable

Definition of Actionable Information

“Actionable information is information that can be acted upon, something that leads to action, something that makes things happen, starts a chain of action and reaction.”

Quoted from a report by the Joint Inquiry into Intelligence Community Activities Before and After the Terrorist Attacks of September 11, 2001 (9/11 Report)



Key Elements for an Actionable Service Catalog

- First, an effective Service Catalog must define services in terms that are familiar and can be easily understood by the customer. A Service Catalog cannot be simply a technical list of what the IT organization thinks it does. It should be easy-to-use and easy-to-understand, written in a language and context that is familiar to your end users and business unit leaders.
- Second, the Service Catalog should be transactional in nature. A consumer viewing an online catalog at Amazon.com or Dell.com assumes that if she sees something she wants in the catalog that she can order it. The same must hold true for a Service Catalog from IT. If the Service Catalog does not also provide the means by which services are requested, fulfilled and tracked, then it will not be used or viewed.
- Finally, an actionable Service Catalog can serve as the system of record for data you need to report on service level agreements – in order to ensure continuous improvement in operational performance. An effective Service Catalog can provide the vehicle to manage customer demand, map fulfillment processes for each service, track your service levels, and even managing billing.



What a Service Catalog IS!!

- A Service Catalog is a “Menu” of IT Service Offerings.
- A Service Catalog is a “Customer Friendly” guide for consumers of IT Services.
- A Service Catalog is *the* place to set initial customer expectations regarding IT Services and the delivery thereof.
- A Service Catalog is a Marketing tool both internally (IT) and externally (Customers).

What a Service Catalog IS NOT!!

- A Service Catalog is not simply a list of tasks organized by functional area!
- A Service Catalog is not written from a technical perspective!
- A Service Catalog is not impossible to create.

IT Service Catalog and Your Customers

- The IT Service Catalog is where your end-users interact with the IT Services you offer:
 - Service Request oriented
 - Targeted to the end-users of IT services
 - Transactional in nature
 - Must be actionable

Service Request Attributes (Service Catalog)

- Service Attributes:
 - Customer View:
 - Service Name
 - Customer Friendly Description
 - Entitlement
 - Authorization
 - Engagement
 - Service Delivery Timeframe
 - Cost Per Unit
 - Technical View (optional)
 - Technical Description
 - Service Owner
 - Service Provider
 - Dependencies on other Services

Service Requests and the Service Catalog

- Each service will have at least one standard Service Request associated with it.
- Some Services will have many different types of Service Requests.
- (Example) Phone Service
 - Add New Phone
 - Modify Existing Phone
 - Remove Phone
 - Etc.

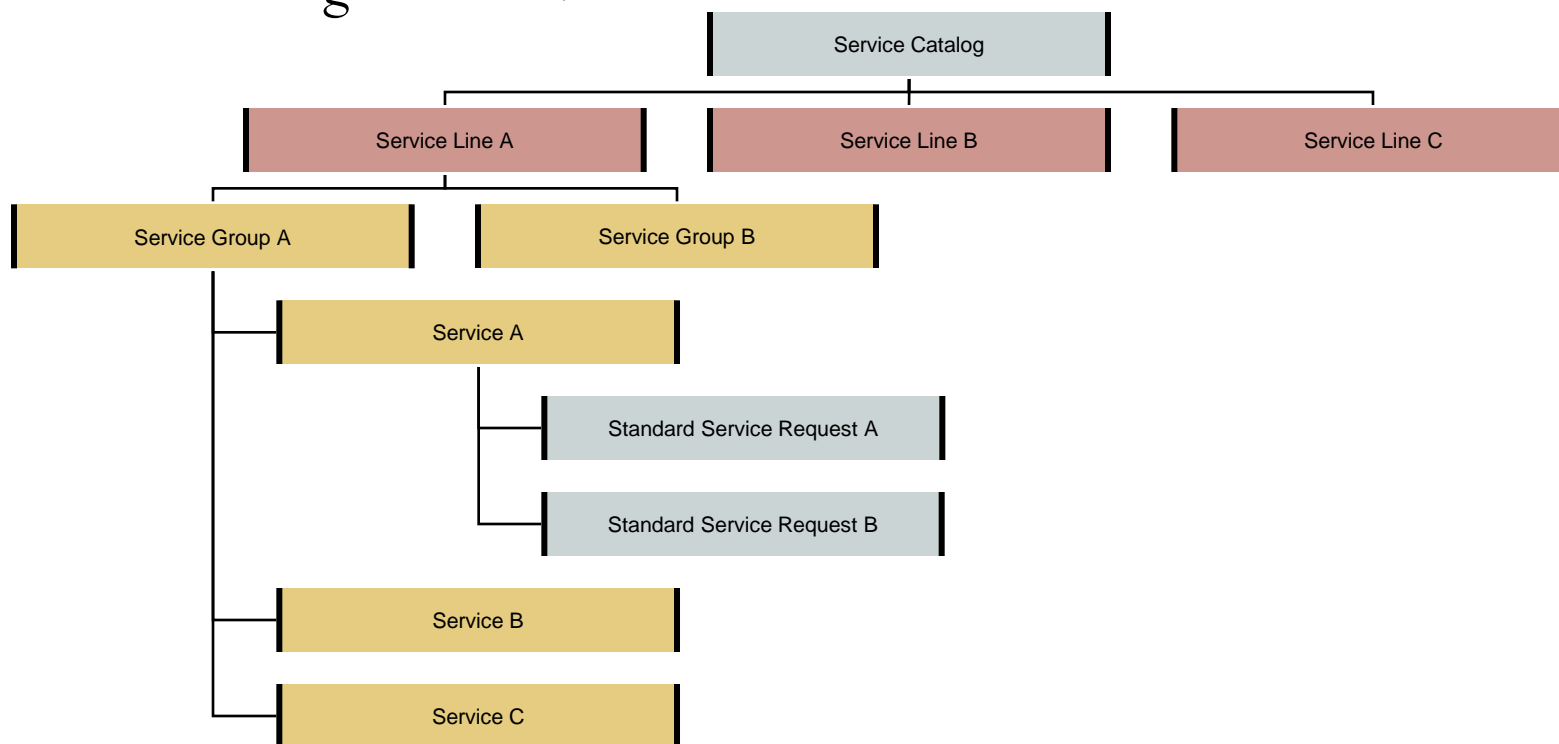


Service Request Management

- Requests for services must be handled in an efficient and repeatable manner that allows the IT organization to effectively scale as demand for IT services increases.
- An actionable IT Service Catalog allows you to provide your Customers with a customer friendly web interface that integrates with your backend workflow management systems and reduces the need for human intervention by automating repeatable processes.
- Effective service request management frees resources that are currently utilized to route and follow up on requests, to focus on higher priority incident management issues.
- It also increases end user productivity by reducing the amount of time spent trying to request services and following up on those requests.

Service Catalog Framework

- Service Categorization:





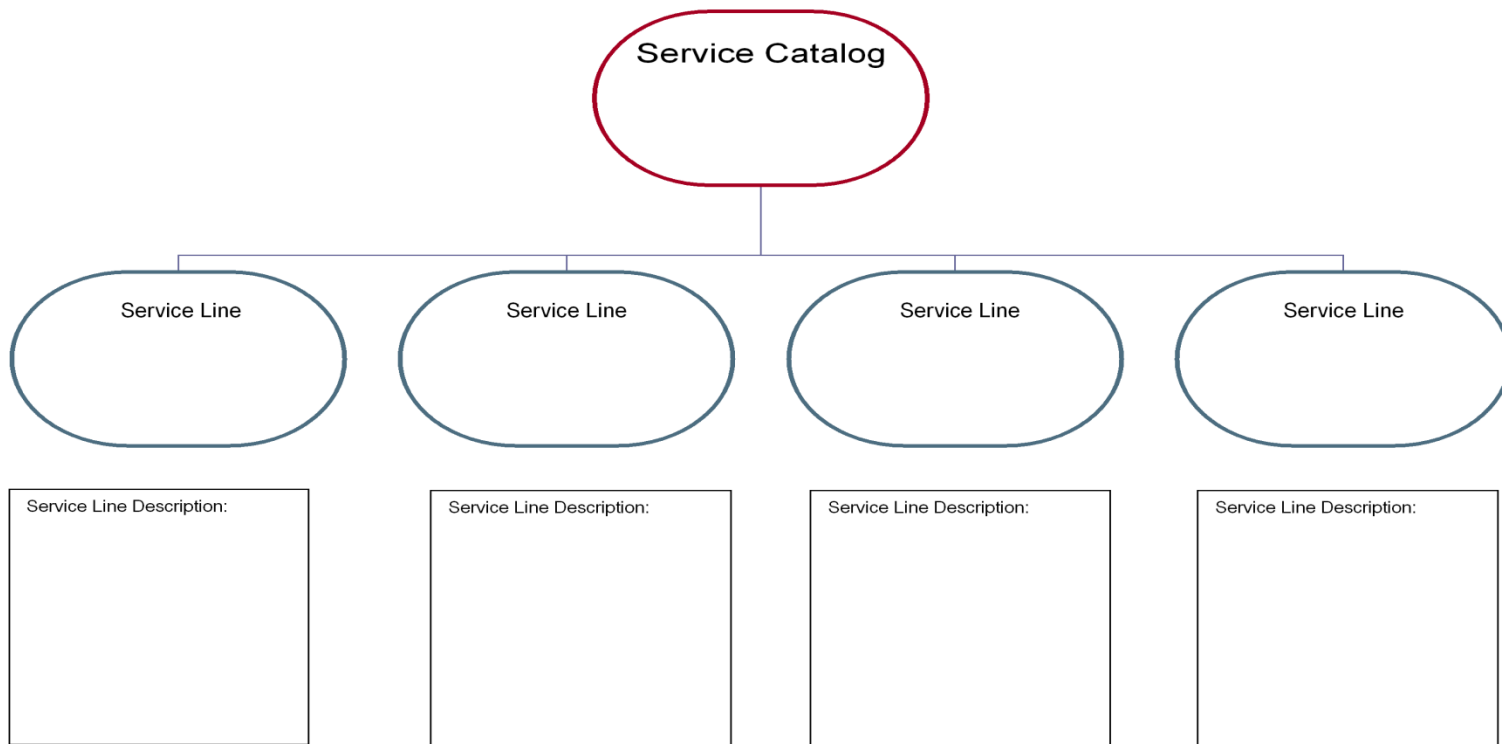
Maturity Levels of an Actionable Service Catalog

- Level 0 - Information Only (Excel, Static Web Pages)
- Level 1 - Links to some sort of fulfillment mechanism (Website, email form, etc.)
- Level 2 - Some Degree of Workflow Automation (Online Web form, Remedy Web entry)
- Level 3 - One Form, One Click - "Auto-Magic" (Fully automated workflow that is tailored to each unique service)

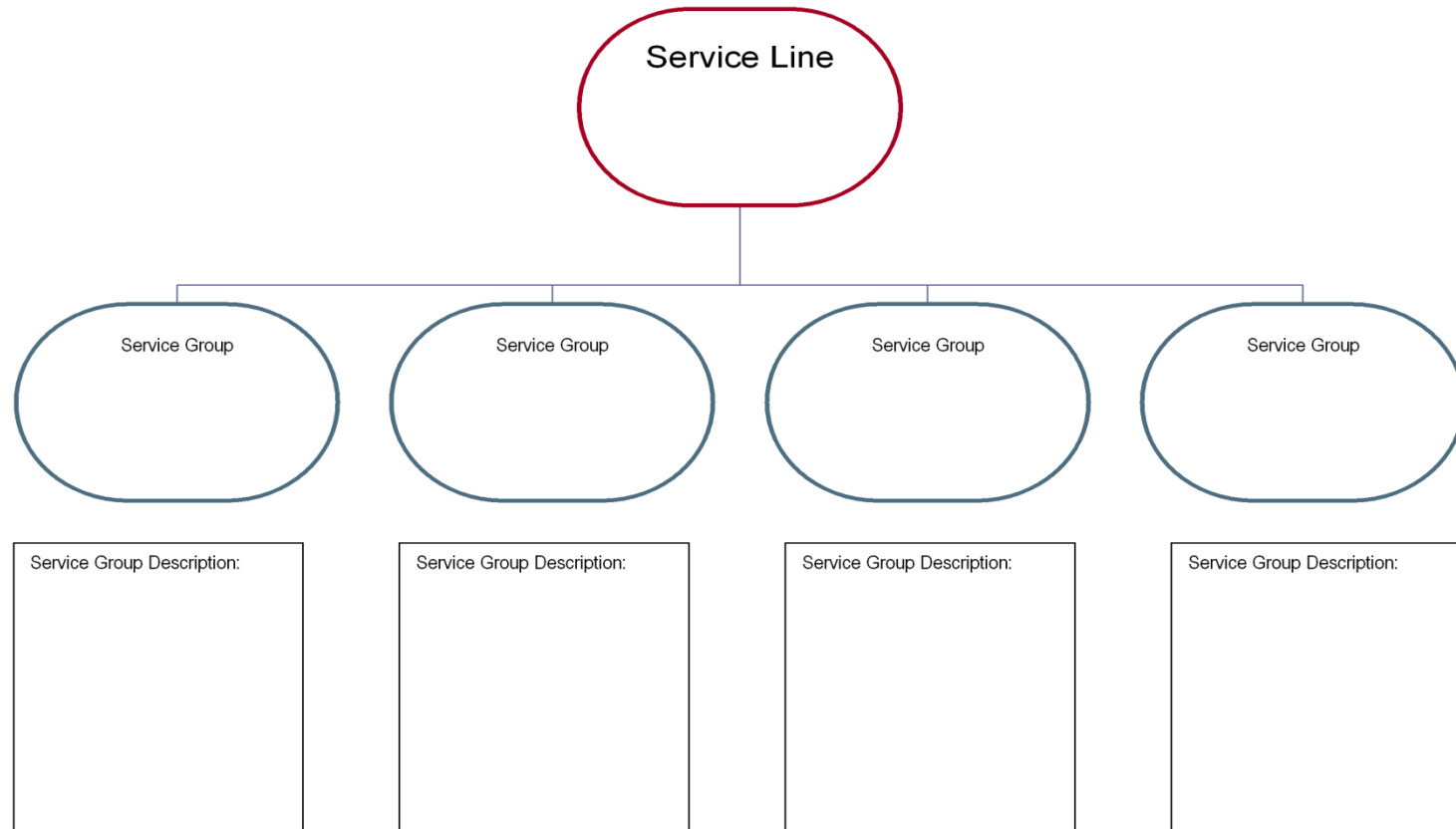
Exercise: Build a Service Catalog Structure

- Define Lines of Service (At least 3 no more than 5)
 - Name
 - Description
- Define Service Groups (For 2 lines)
 - Name
 - Description
- Define 2 Services (For 1 Group)
 - Name
 - Description

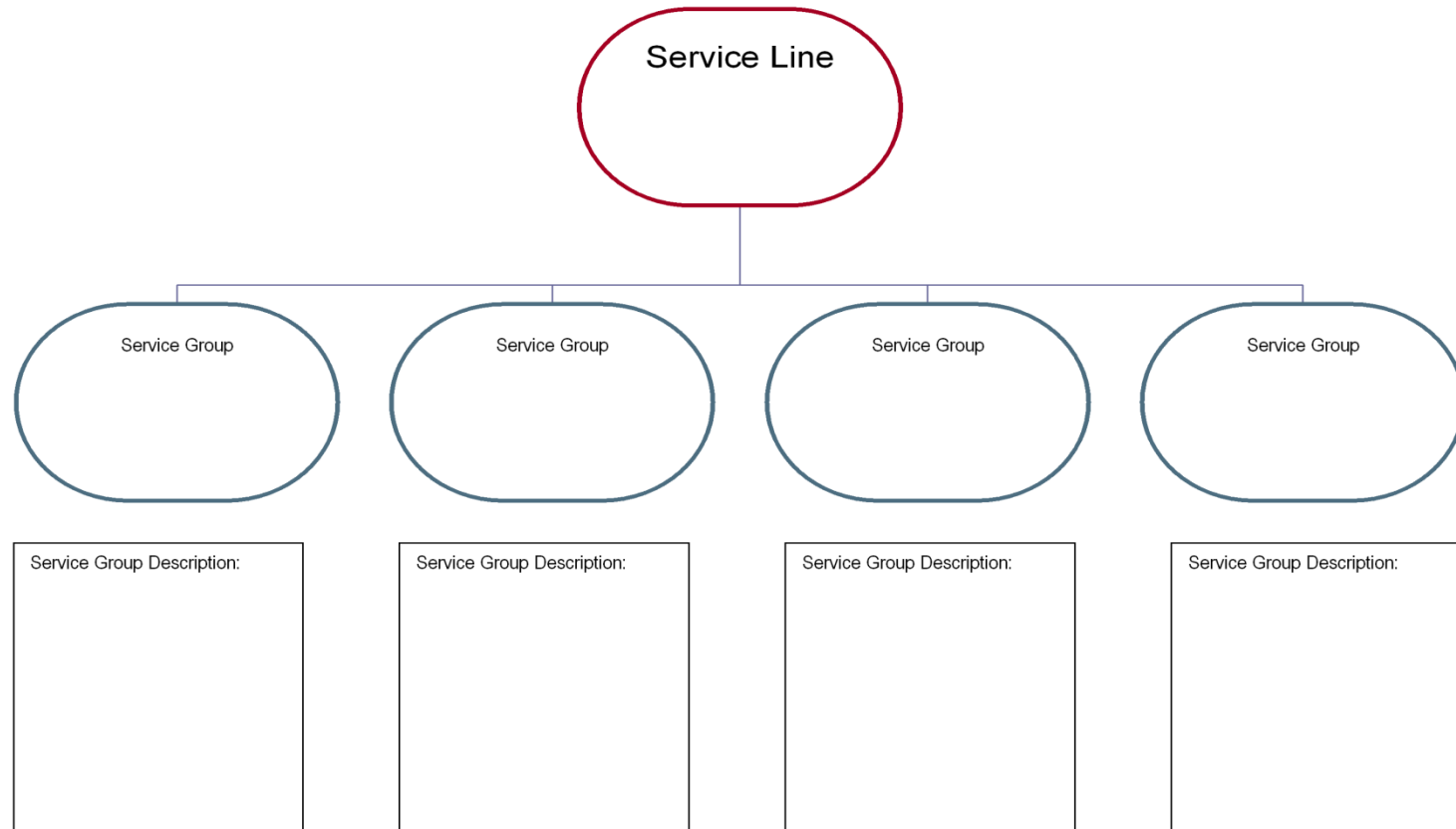
Effective Service Catalogs: Exercise 1 – Service Lines



Effective Service Catalogs: Exercise 1 – Service Groups



Effective Service Catalogs: Exercise 1 – Service Groups



Review

- Service Catalog must be actionable to be effective
- Catalog must be created from your customers POV.
- Must demonstrate how the services enable critical business functions
- Must be easy to navigate, search, and order from
- Should be integrated with your Service Management System
- Start simple and add complexity as adoption increases

Q&A

- Any questions?
- Comments?
- Areas of additional discussion?

Resources

- www.servicecatalogs.com – “Open Source” Service Catalog Community with lots of good info.
- ITIL V3 and the Service Catalog Resources:
 - **PDF:** *“The official introduction to the ITIL Service Lifecycle” OCG*
 - **Book:** *“Defining IT Success Through the Service Catalog”*



Thank you very much for attending this session.
Please fill out an evaluation form.