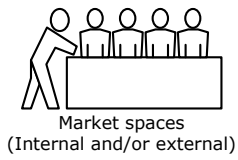


# ITIL® v3 – The big picture



**Service Strategy**

- ✓ Determine Perspective
- ✓ Form a Position
- ✓ Craft a Plan
- ✓ Adopt Patterns of action

**Key principles**

- Service Lifecycle
- Value: Utility & warranty
- Service Assets: Resources & capabilities
- Systems, processes, roles, units and functions
- Service provider types
- Value networks

**Strategy Generation**

- Define the market
- Develop the offerings
- Develop strategic assets
- Prepare for execution

**Service Portfolio Management**

- Define
- Analyze
- Approve
- Charter

**Risk Management**

- Analyze risk
- Manage risk

**Demand Management**

- Analyze and codify Patterns of Business Activity (PBA)
- Match User Profiles (UP)
- Develop Service Packages
- Define Service Level Packages

**Financial Management**

- Value Services
- Model demand
- Optimize Service Portfolio
- Optimize Service provisioning
- Plan
- Analyze Service investments
- Account
- Comply
- Analyze Variable Cost Dynamics (VCD)

**Key documents**

- Service objectives, strategies, policies & plans
- Service definition, classification & visualization
- Service Models
- Option Space
- Business Impact Analysis (BIA)
- Financial Plan
- Business Case
- Patterns of Business Activity (PBA)
- User Profiles (UP)
- Service Packages
- Service Level Packages (SLP)



**Service Design**

- ✓ Collect requirements
- ✓ Analyze
- ✓ Design
- ✓ Evaluate
- ✓ Procure and/or develop

**Key principles**

- Five design aspects
  - Service Portfolio design
  - Definition of requirements and design of Service solutions
  - Technology and architectural design
  - Process design
  - Measurement design
- Service Oriented Architecture
- Business Service Management
- Service Design Models
- People, Processes, Products/Technology and Partners (the 4 Ps)

**Service Catalogue Management**

- Agree Service definition
- Agree contents
- Produce and maintain Service Catalogue
- Interface with stakeholders

**Service Level Management**

- Determine requirements and make SLAs
- Monitor & report
- Improve customer satisfaction
- Conduct service review
- Revise SLAs and underpinning agreements
- Develop relationships
- Maintain templates

**Availability Management (Reactive and proactive)**

- Monitor, measure, analyze, report & review
- Investigate and instigate
- Assess and manage risk
- Implement countermeasures
- Plan and design
- Review and test

**Capacity Management (Business, service & component)**

- Review current capacity
- Improve capacity
- Assess, agree & document requirements
- Plan new capacity

**Information Security Management**

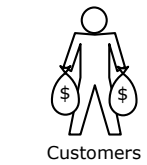
- Produce and maintain information security policy
- Implement security policy
- Assess and classify information assets
- Implement and improve security controls
- Monitor and manage security breaches
- Reduce security breaches
- Perform reviews, audits and penetration tests

**IT Service Continuity Management**

- Initiate project
- Determine requirements and produce strategy
- Develop plans and implement strategy
- On going operation
- (Invoke the continuity plan)

**Key documents**

- Service Design policies and plans
- Service Acceptance Criteria (SAC) and Service Level Requirements (SLR)
- Service Design Package (SDP)
- Solution Designs
- Architectures & standards
- Service Level policy, plans and reports
- Service Level Agreements (SLA) and Operational Level Agreements (OLA)
- Service Improvement Plan (SIP)
- Availability policy, plans, design criteria, risk analysis and reports
- Capacity policy, plans, forecasts and reports
- Business and IT Service continuity policy, strategy, plans, risk and business impact analysis & reports
- Business and information security policy, strategy, plans, risk analysis, classification, controls and reports
- Supplier and contracts policy, strategy, plans and reports
- RACI matrix



**Service Transition**

- ✓ Plan and prepare
- ✓ Build and test
- ✓ Testing and pilots
- ✓ Transfer, deploy, retire
- ✓ Review and close

**Key principles**

- Policies for Service Transition
- Managing communications and commitment
- Managing organization and stakeholder change
- Stakeholder management
- Big bang vs. phased
- Push vs. pull
- Automation vs. manual
- Service V model
- Data-Information-Knowledge-Wisdom

**Release and Deployment Management**

- Plan deployment of release package
- Prepare for build, test and deployment
- Build and test
- Test service and conduct pilot
- Plan and prepare for deployment
- Perform transfer, deployment & retirement
- Verify deployment
- Support early life
- Review and close deployment
- Review and close service transition

**Change Management**

- Create and record Request for Change (RFC)
- Review RFC
- Assess and evaluate change
- Authorize change
- Plan updates
- Coordinate change implementation
- Review and close change

**Transition Planning and Support**

- Define transition strategy
- Prepare for Service transition
- Plan and coordinate Service transition
- Advice
- Provide administration
- Monitor and report progress

**Service Knowledge Management**

- Define Knowledge Management strategy
- Transfer knowledge
- Manage data and information
- Use the Service Knowledge Management System (SKMS)

**Evaluation Management**

- Plan evaluation
- Evaluate predicted performance
- Evaluate actual performance

**Service Asset and Configuration Management**

- Management and planning
- Configuration identification
- Configuration control
- Status accounting and reporting
- Verification and audit

**Service Validation and Testing Management**

- Manage validation and test
- Plan and design tests
- Verify test plan and test designs
- Prepare test environment
- Perform tests
- Evaluate exit criteria and report
- Clean up test environments and close

**Key documents**

- Service Transition policies and plans
- Service Design Package (SDP)
- Service Acceptance Criteria (SAC)
- Change and Configuration Management policy, plans and reports
- Change schedule
- CAB agenda & minutes
- Configuration model
- Configuration baselines and status reports
- Release policy, plans, packages and documentation
- Service quality policy, risk policy, test strategy, test models, test plans and test reports
- Build plans and documentation
- Evaluation plans & reports
- Deployment plans and reports
- Transition closure report
- Knowledge Management strategy



**Service Operation**

- ✓ Monitor & control
- ✓ Manage activities
- ✓ Generate metrics
- ✓ Provide reports

**Key principles**

- IT Services vs. technology components
- Stability vs. responsiveness
- Quality vs. cost
- Reactive vs. proactive
- Staff
- Operational health
- Communication
- Documentation

**Request Fulfillment**

- Select and input details of Service Request
- Approve Service Request
- Fulfill Service Request
- Close Service Request

**Incident Management**

- Identify Incident
- Log Incident
- Categorize Incident
- Prioritize Incident
- Carry out initial diagnosis
- Escalate Incident
- Investigate and diagnose Incident
- Resolve and recover Incident
- Close Incident

**Access Management**

- Request Access
- Verify request
- Provide rights
- Monitor identity status and maintain users, roles and groups
- Log and track access
- Remove or restrict rights

**Problem Management**

- Detect Problem
- Log Problem
- Categorize Problem
- Prioritize Problem
- Investigate and diagnose Problem
- Find a Workaround
- Raise a Known Error
- Resolve Problem
- Close Problem
- Review Major Problem

**Event Management**

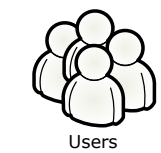
- Generate Event notification
- Detect Event
- Filter Event
- Categorize Event
- Correlate Events
- Trigger response
- Select response
- Review actions
- Close Event

**Operations and Technology Management**

- Monitoring and control
- IT Operations control
  - Console Management
  - Job Scheduling
  - Backup and Restore
  - Print and Output
- Facilities Management
- Technology Management
  - Mainframe
  - Server
  - Network
  - Storage and Archive
  - Database
  - Directory Services
  - Desktop
  - Middleware
  - Internet/Web

**Key documents**

- Service Operation policies and plans
- Event Management policy, plans and reports
- Incident Management policy, plans and reports
- Incident Models
- Major Incident procedure
- Request Fulfillment policy, plans and reports
- Request Models
- Problem Management policy, plans and reports
- Problem Models
- Information security policy, plans, classification, controls and reports
- Process manuals
- Technical documentation
- Operational procedures and instructions
- Functional documentation
- User guides



**Continual Service Improvement**

- ✓ Plan
- ✓ Do
- ✓ Check
- ✓ Act

**Key principles**

- Organizational change
- Clear ownership, roles, and responsibilities
- Service measurement
- Assessments and benchmarking
- Governance

**7-Step Improvement Process**

- Define what you **should** measure
- Define what you **can** measure
- Gather data
- Process data
- Analyze data
- Present and use information
- Implement corrective action

**Service Measurement**

- Develop a Service Measurement framework
- Define what to measure
- Set targets
- Create a measurement framework grid
- Interpret and use metrics
- Create scorecards and reports

**Service Reporting**

- Define reporting policies and rules
- Collate
- Translate and apply
- Publish

**Key documents**

- Continual Service Improvement policies & plans
- Corporate and IT vision, mission, goals and objectives
- Critical Success Factors (CSF)
- Key Performance Indicators (KPI) & Metrics
- Service Level Targets
- Balanced Scorecard
- SWOT analysis
- Service Improvement Plans (SIP)
- Business Case
- Reporting policies & rules
- Reports

