

# EASYVISTA™

## 3-PART SERIES

# REAPING THE REWARDS OF IT FUNDAMENTALS WITH **BARCLAY RAE**



**EPISODE 2:**

October 11 2023 at 4pm BST, 11am EST

**SAVE YOUR SEAT**

# EASYVISTA™



**BARCLAYRAE**  
Independent Management Consultant

# Easy-Vista Webinars Episode 2

## ITSM Fundamentals



# 3 Webinar Series

**13<sup>th</sup> September**

**Episode 1 – Futures and Ai opportunities**

**11<sup>th</sup> October**

**Episode 2 – ITSM Fundamentals**

**29<sup>th</sup> November**

**Episode 3 – Bringing Fundamentals and Futures together**

# Presenter – Barclay Rae

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**ITSM Consultant and author since 1994**

**Over 700 Service Transformation Projects across all sectors**

- ITIL4 architect team – co-author *ITIL Practitioner, ITIL4 Foundation*
- Lead Editor *ITIL4 Create Deliver and Support*
- itSMF UK CEO 2015 – 18, Director 2015 – 2020
- SDI Associate, auditor
- Co-author *SDI Service Desk Certification standard*
- Author of *ITSM Goodness*
- Senior Advisor, ITIL, PeopleCert
- Service Management Principal (UK), CDW
- HDI top 25 ‘Thought Leader’

# Agenda

**1 ITSM value**

**2 People and culture**

**3 Tools and models**

**4 Some key practices/processes**

**5 Summary**

# ITSM Value

# The value of Service Management

**Collaboration**



**HOW WE ENGAGE AND WORK WITH COLLEAGUES, USERS, CUSTOMERS AND PARTNERS**

**Business focus**



**THE WAY THAT WE WORK TO MEET BUSINESS NEEDS, DEMONSTRATE VALUE, DEVELOP OUR VALUE STREAMS AND MANAGE COMPLEXITY, USE TOOLS AND WORK PRACTICES TO DELIVER PRODUCTS AND SERVICES**

**Assurance**



**THE APPROACH THAT WE TAKE TO MANAGING RISK, ACCOUNTABILITY, TIME-TO-MARKET, AND EFFICIENCY**

**Innovation**



**HOW WE DEVELOP NEW AND UPDATED PRODUCTS AND SERVICES TO DELIVER BUSINESS OUTCOMES – BOTH FROM DESIGN AND BUILD TO RUN AND SUPPORT**

**Governance**



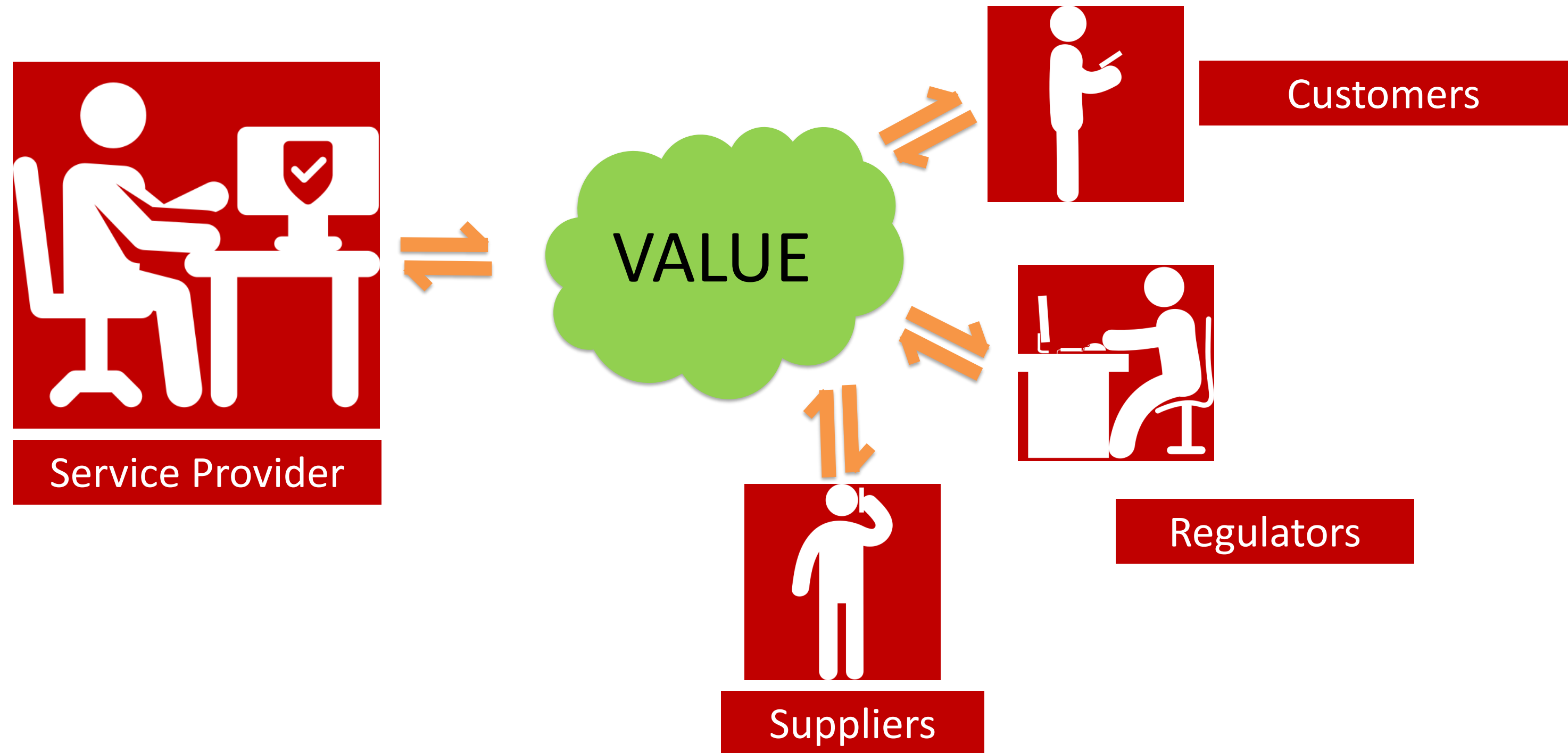
**HOW WE ACCOUNT FOR AND SAFEGUARD THE KNOWLEDGE RESOURCES OF OUR CUSTOMERS – PARTICULARLY WITH CLOUD AND DISTRIBUTED MODELS.**

# Key questions

- 1. Does the (IT/service) organisation deliver what customers need?**
- 2. Can we demonstrate the value delivered?**
- 3. Does the customer appreciate the value delivered?**



# 'Co-Creating' Value



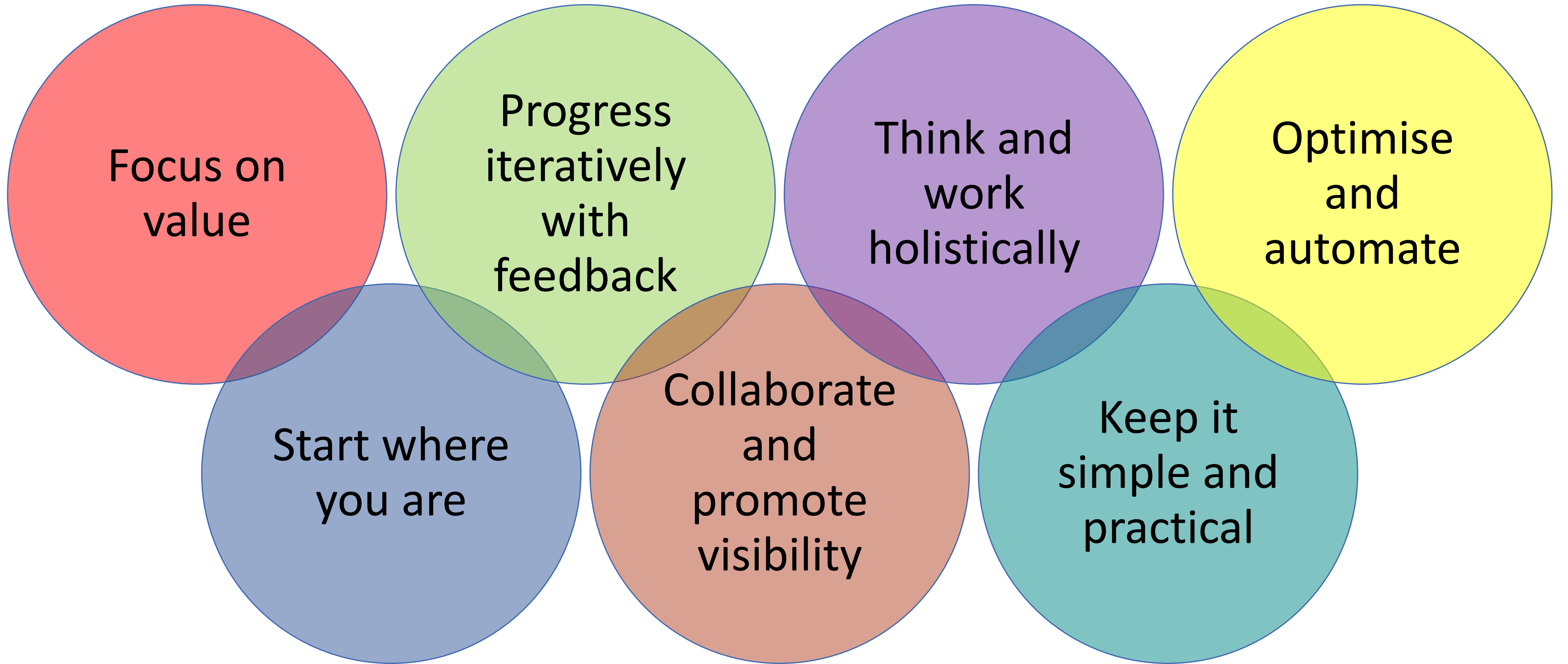
# People and Culture

# ITSM Critical Success Factors

## People buying in to change...

- Leadership vision and strategy – what are we trying to achieve?
- Leadership support – visible, financial, verbal, directional
- Critical planning – operational and tactical
- Organisational Change management
- Clarity on direction and expectations
- Sensible/realistic phasing
- Stakeholder engagement – across teams, users/customers, partners, leadership
- Good focus on data and outputs – not just processes and inputs
- Pragmatic use of tools and frameworks...

# Guiding Principles



# People and Culture?

People Organisations Governance Management Ownership



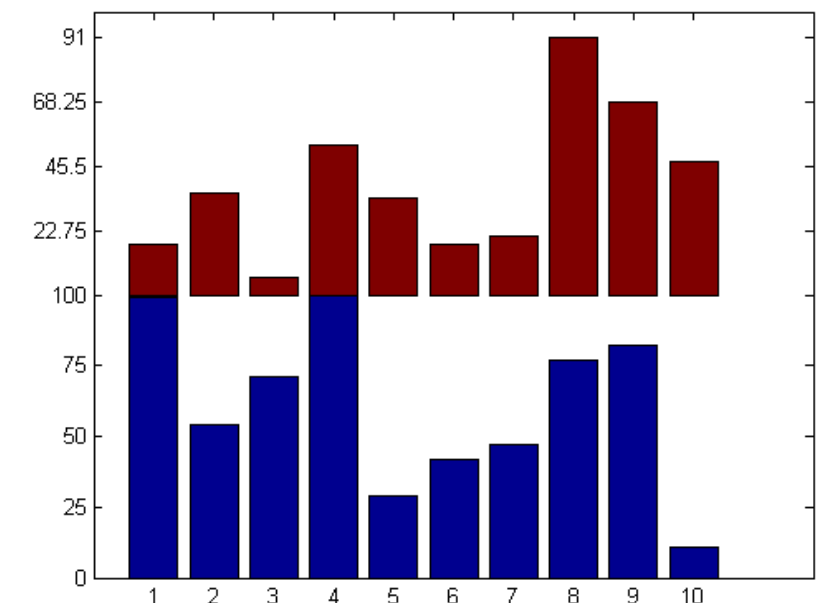
# People and Culture?

People Organisations Governance Management Ownership



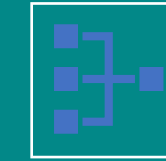
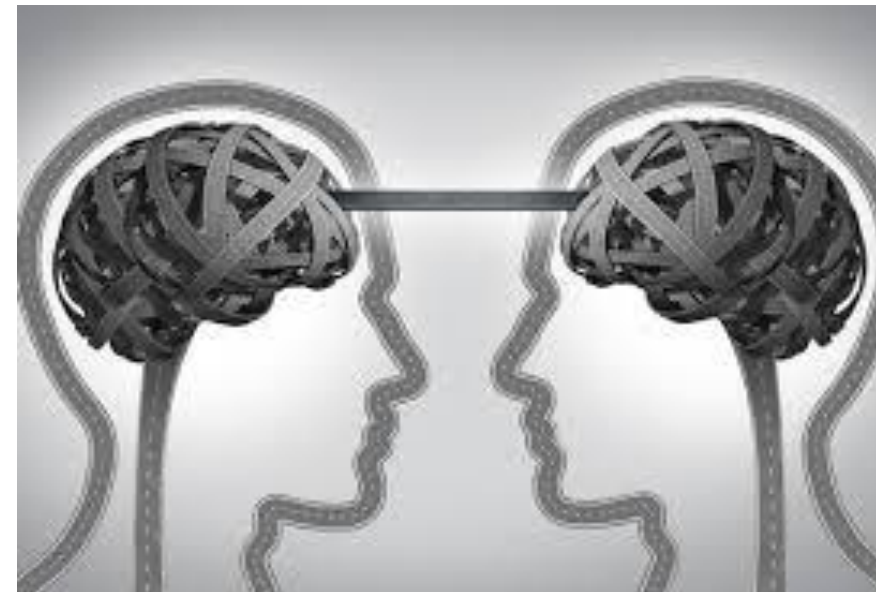
# Key questions

- Are we working together towards shared business objectives?
- Are our cross functional teams working effectively?
- Are our people happy / well treated?
- Do we understand what our users/customers feel and experience when using the services?
- Do our processes and practices work towards achieving the best outcomes ?
- How do we measure and present our performance?
- Are we measuring the right things?
- Are we presenting and demonstrating about value?



# What we do

- We support *people* not just technology
- Success depends on our ability to interact productively, positively and professionally
- This involves collaboration:
  - Between people
  - Across teams and IT departments
  - Beyond IT departments
  - With partners



Communication is a 2-way process



We are all communicating all the time



There is no single way of communicating



Timing and frequency matter



The message is in the medium



# Tools and Models

# Mindset ...?



# Mindset



## IT Service Management Toolsets

- Give you proven ITSM processes and capabilities
- Provide good platforms for improved CX and engagement – e.g. via portals and automation
- And more...

## But they...

- Don't solve your culture problems – unless you've got good OCM
- Require your input and organisational data – and services
- Should be implemented in phases
- Need good levels of integration
- Need support and maintenance – e.g. the SC or CMDB/SACMDB are never finished...
- Need preparation and readiness to get the best results

# Frameworks and models

**ITIL**

**BRM**

**SDI/HDI...**

**Devops, SRE, Agile**

**COBIT**

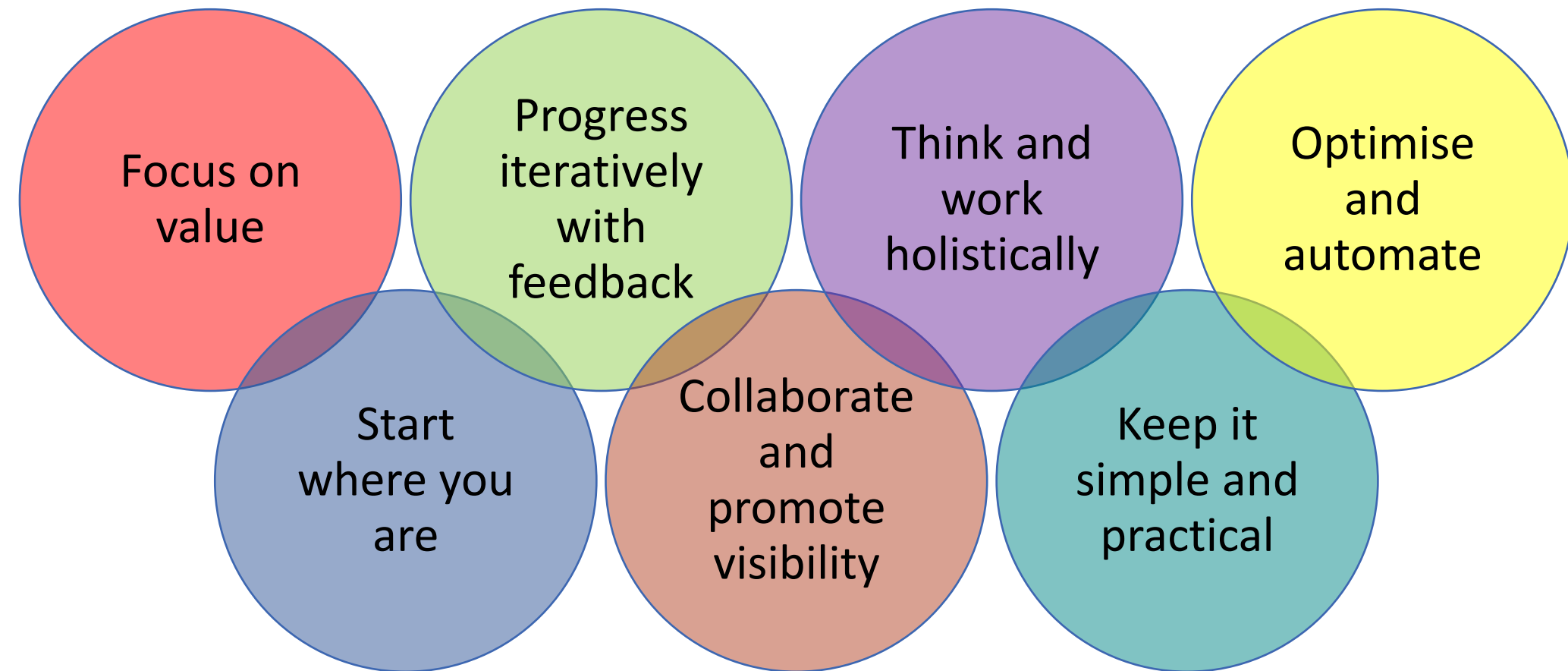
**FITSM**

**SIAM**

**Verism**

**Experience Management**

**Standards, ISO 20K etc..**



# Good governance

<b>Direction</b>	Clear goals, principles, measurable objectives, culture, vision/mission, measures of success
<b>Trust</b>	Given, taken, courage, vulnerability, mutual professional respect, debate not conflict
<b>Safety</b>	Safe to fail, improvement culture, ethical approach, willingness to call out issues people focus, CSR
<b>Outcomes</b>	Clear expectations, are they being met? Open accountability, WDSLL?
<b>Mix</b>	Blend, diversity, experience levels, focus levels, different roles and capabilities



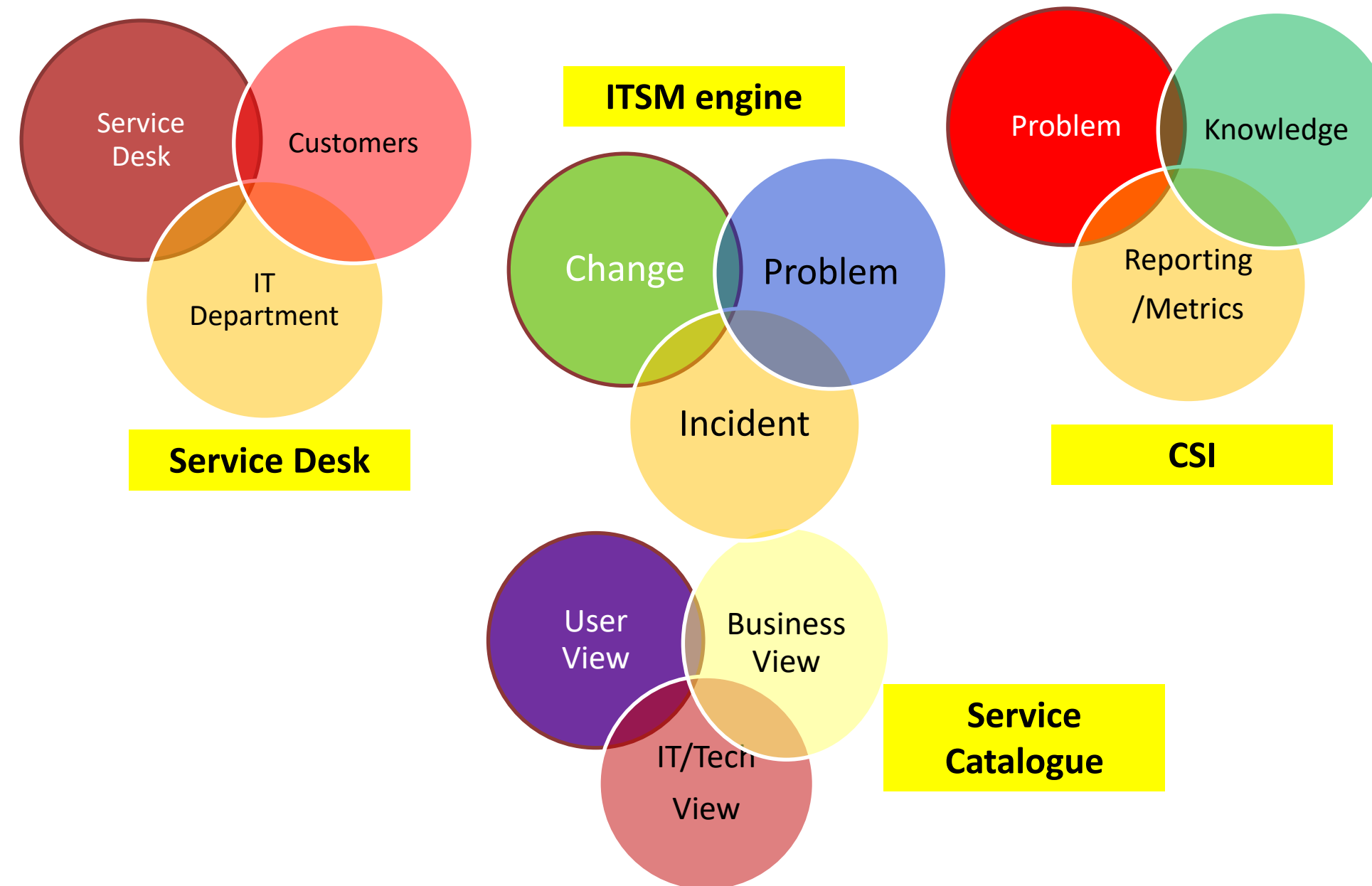
# 5 (dys)functions of a team - Lencioni



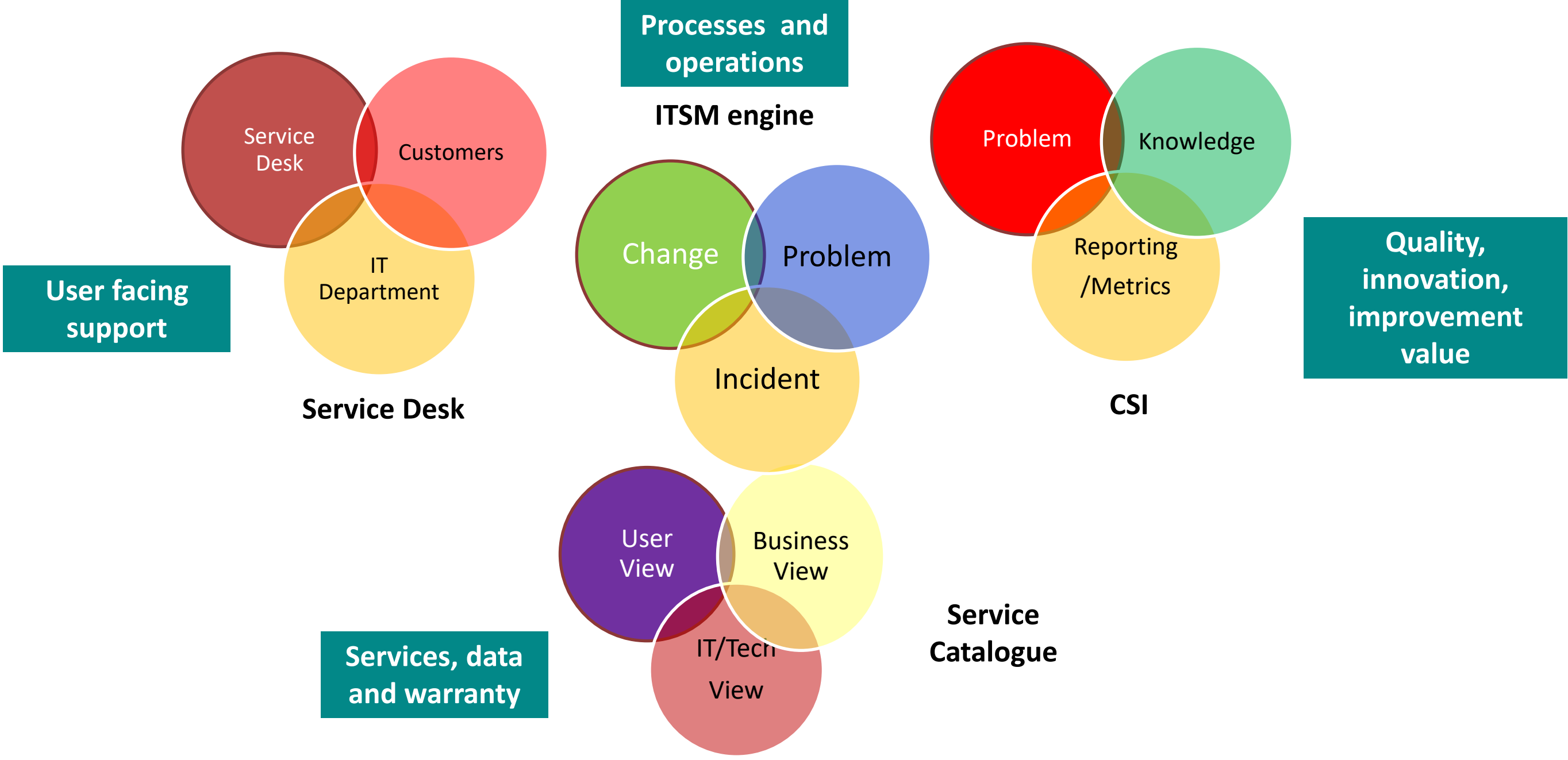
# Key Practices/Processes



# Core ITSM elements



# Core ITSM elements



# Core Practices – Service Catalogue

## ***START FROM HERE***

***Define and document your services, what these deliver to users and what you need to deliver them***

Your system, tools, data and people will appreciate this – eventually.

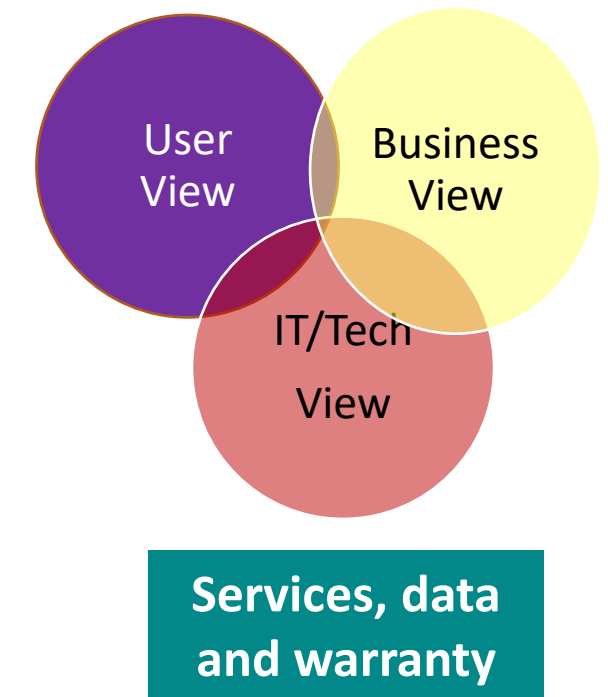
SC supports improved Service desk support, as well as automation...

SC is essential as a model for knowledge and reporting/MI

SC supports mapping and visualisation of services and assets

SC is key for developing business-focused cost models

SC is the centre piece (live services) of a portfolio model



# Core Practices – Service Desk

## *The image of IT and shop window, the flagship, the firefighters*

Need resources and support – experience, skills, capabilities, access, tools, visible support, appreciation, respect...

Provide the marketing and sales operation for IT/Technology

Usually understand the business and users

Don't get out much

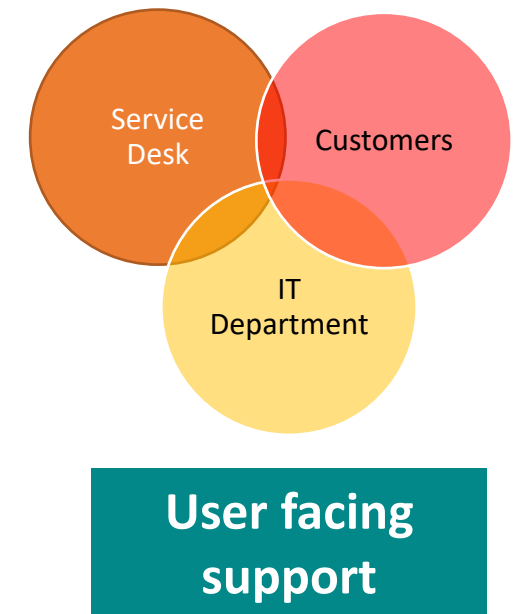
Should be involved...early

The focal point of ITSM

Shift left

Support models – tiered v swarmed

Everyone is part of the service desk... That's YOU too!



# Core Practices – ITSM Engine

***Incident, problem, change, config, SLM, knowledge, request***

Mostly provided via the tools

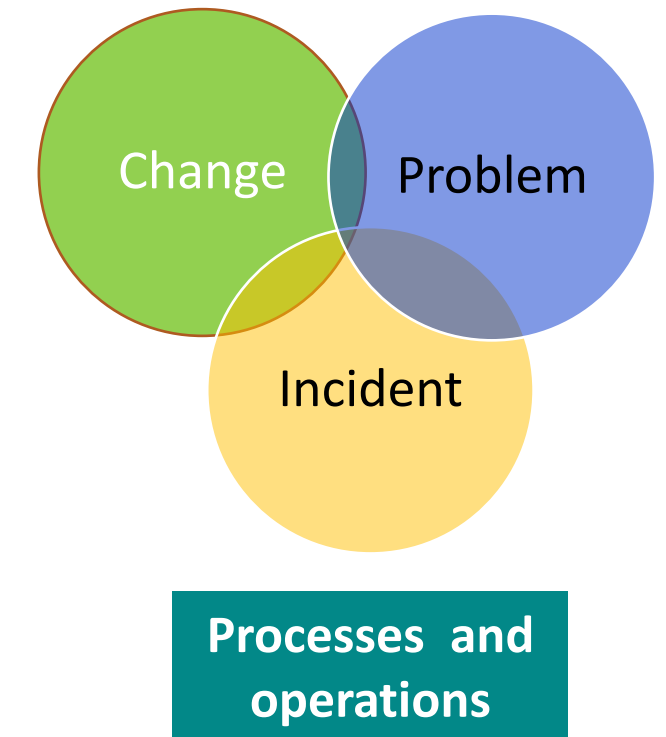
Provide assurance, consistency, audit trail, real-time actionable support

All deliver value on their own – integration and synergy offer compound value

Underlying data is key – what are your specific inputs and outputs..?

Don't all need to be used – certainly not all at once.

Need collaboration across the organisation – not just *'oh that's service desk'*



# Core Practices – CSI

## *Where quality and change, improvement happens – the game changer*

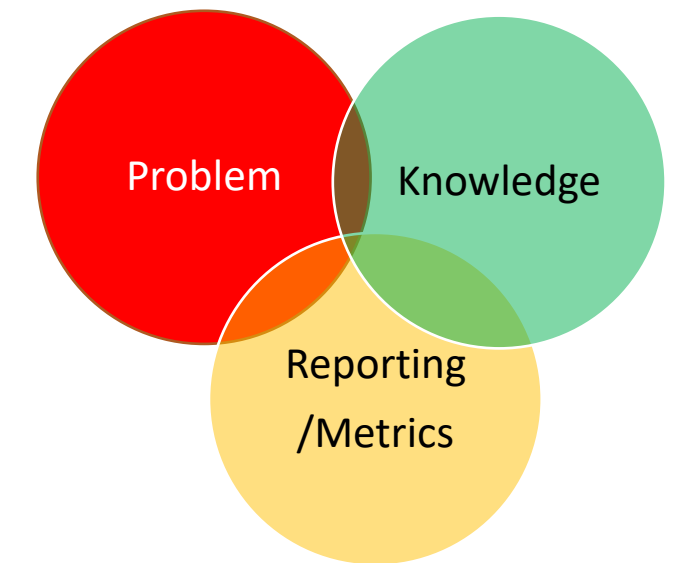
Metrics and data analysis – develop trends and identify areas for improvement

Problem management – turning curiosity and nagging into a structured process...!?

To improve service and CX/reduce incidents, improve efficiency and quality, reduce risks, reduce costs..

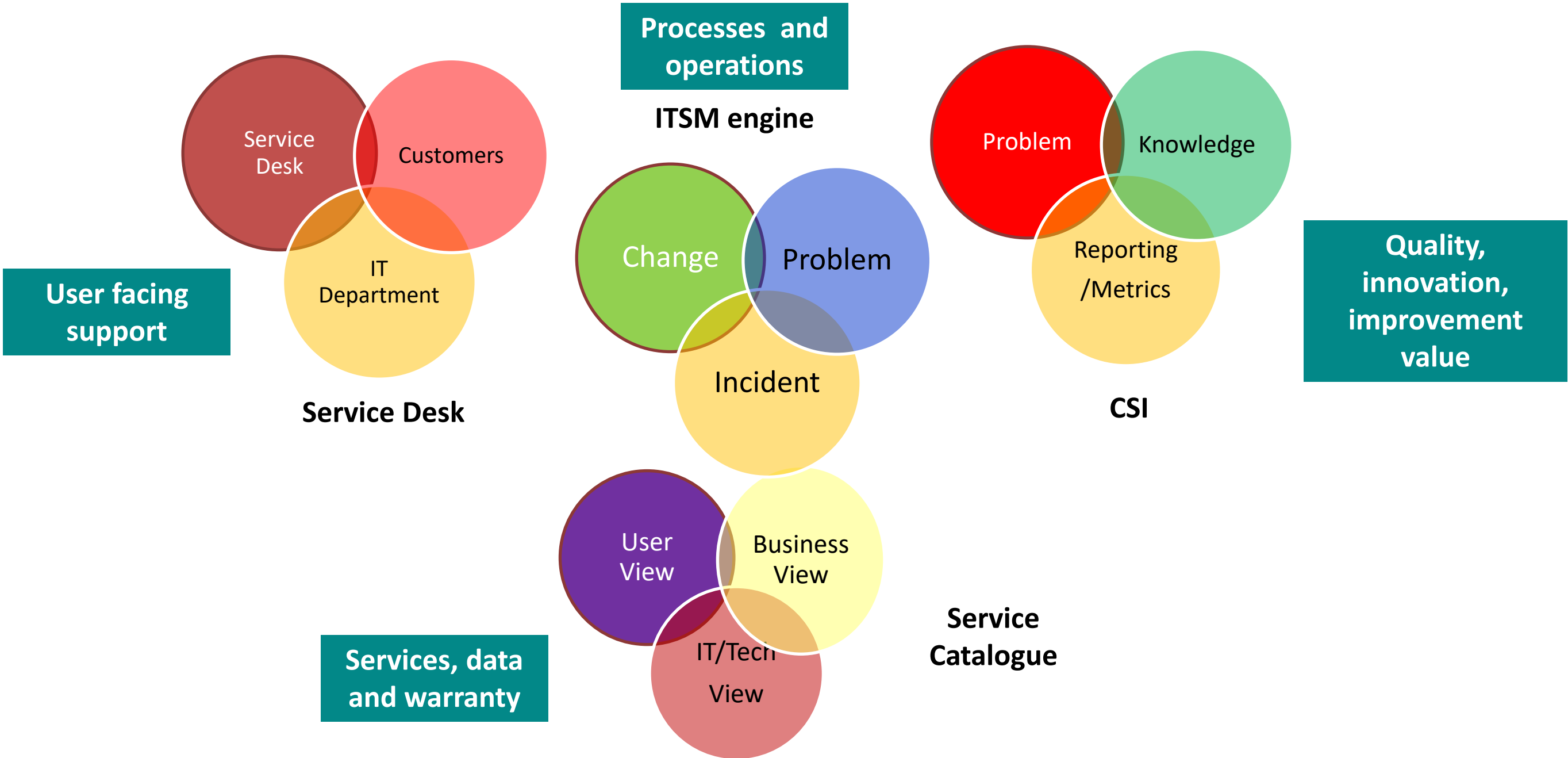
Knowledge – turn your data into useful time and cost saving resources

Needs measurement, needs definition for audience and context



Quality,  
innovation,  
improvement  
value

# Core ITSM elements



# ITSM Challenges



**Tools and models, frameworks alone don't deliver successful service management**

Collaboration and 'joined up' **end-to-end** thinking are needed for success.

To prepare - data and processes must be robust and accurate – Knowledge, CMDB, practice/workflow documentation

Usually this will require some changes for all teams in how they do their work.

The 'why' must be clear to all...



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# Thank You



**EASYVISTA**<sup>TM</sup>

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*Anchor, Spotify, Google, Apple,*

# The 7 Steps to ITSM Goodness

## **1** Engage and listen to customers

Start by trying to understand the customer experience and expectation of IT

## **2** Build a service structure based on business outcomes

Services trump SLAs, so build a picture of what you are delivering across IT

## **3** Invest in the service desk, the focal point and flagship of IT

It needs quality and investment to make it work for the whole of IT

## **4** Get Problem Management working

This is the game changer that most organizations still struggle with. It requires the right person more than a good process

## **5** Report on the useful stuff

Stop producing piles of reports; report on services and on what's important for the customer and business (not what IT does)

## **6** Get all of IT working together

It's not just about the service desk; everyone must play a part and this needs to be made clear and managed with governance

## **7** Change and sell the pitch

Success needs to be communicated and marketed – continuously

# Sustainable Service Goodness Based on ITSM Goodness

- Engage + listen – to customers, users, stakeholders, expectations
- Define + map – services, value streams, catalogue, profiles, priorities, performance, experience, outcomes, costs,
- Structure + invest – support model, service desk, capability, quality
- Create + manage – processes, practices, quality, governance
- Produce + use – reports, dashboards, scorecards, for experience, outcomes, analysis, narrative, decision-support
- Build + lead – people, teams, collaboration, projects, operations, culture
- Communicate + sell – success, improvement, achievement, value



# Sustainable Service Goodness Based on ITSM Goodness



7 steps	What?	Current State	Future planned	Practical Steps
<b>Engage + Listen</b>	BRM, CX, SLA, XLM, Value definitions, outcomes			
<b>Define + Map</b>	SLA, XLA, KPI, Service catalogue, CMDB, value streams			
<b>Structure + Invest</b>	Service Desk, service model, automation, tools, capabilities			
<b>Create + Manage</b>	Integrated process /practices, problem, CSI, ITSM			
<b>Produce + use</b>	Reporting, Data analysis, dashboard, infographics, Value Demonstration			
<b>Build + Lead</b>	Project, management, collaboration, teamwork			
<b>Commun</b>	Communications and PR, Messaging, culture,			