Chapter 1

Managing IT Services: Welcome to the World of ITIL

In This Chapter

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▶ Getting the gist of the content of ITIL

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*A*ren't computers wonderful? Well, they are when they work and do what you want them to do. But what about the organisations that provide services using computers, or information technology (IT) as it tends to be known? You have the Internet providers, such as your broadband supplier. You have the companies that allow you to shop on the Internet. What about the place where you work? Who provides the IT stuff that sits on your desk? The answer is, the IT provider. Perhaps you even work for one of these organisations. If so, this book is right up your street.

This book is all about the Information Technology Infrastructure Library (ITIL). Huh? Sounds meaningless, I know. Basically, ITIL is a bunch of books that give advice to service providers about how to manage their IT services in such a way that they meet your expectations.

The focus of this book is service management. Users have great expectations of IT services. You expect IT services to be there when you want them. You expect them to be easy to fix when they break. You expect there to be a nice person on the end of the phone to help you out and give you advice. Well, this book turns the tables and looks at how the companies that provide IT services do what you want them to do.

Defining Some Basic Terms

I'm going to start by ensuring you understand some basic terms:

✔ **Service:** Something that provides value and is available to a customer from a provider. For example, take travel agents. They sell you a holiday package and make sure all the individual bits work together. They book the flights, the transfers, the hotels and any excursions. What do you do? Pay the money and turn up. Travel agents save you the effort, cost and risk of doing the individual bits for yourself. They provide a service that is of value to you.

✔ **IT service:** A collection of IT bits and bobs along with the people and documents required to provide an IT system which delivers a service that provides value to a customer. Basically, a bunch of techie stuff that allows you to do something useful with your computer.

For example, when you shop using the Internet, you're using an IT service. Your PC, your Internet provider and the company providing the website are all providing IT services for you to use. When you shop online, the service you use consists of many component parts – some of them you own, some of them other people own. You own your PC. Your Internet provider owns your Internet connection and some network stuff. The online store that you're buying from owns the website. But you want it all to work as one seamless system. Wouldn't it be great if regardless of which bit breaks, one person deals with it for you?

✔ **Service management:** Brace yourself, this is a tricky term to define. Only joking – service management means managing a service. In a nutshell, the provider is encouraged to identify and agree what the customer needs and then provide it in an ongoing way. The following section elaborates further on service management.

✔ **IT service provider:** An organisation that provides IT systems to a user (customer). The organisation may be an internal IT department of the company you work for – the people who put the computers on your desks and fix them when they go wrong. Equally it may be a commercial organisation that provides IT services in exchange for money, in other words an Internet provider or IT outsourcer. In all cases these organisations are providing a service to their customers.

You'll find out much more about service management and these terms as you dive into this book. I describe the basic terminology in Chapter 2.

Equating Service Management with Customer Service

What annoys you when you go shopping, or go to a restaurant, or phone up your bank's call centre? Is it the service you get? Do bored shop assistants who are more interested in chatting with their friends really annoy you? Do you get frustrated when you arrive at the restaurant and are wilfully ignored for five minutes while standing by the door? Does the call centre assistant robotically ask the same questions as usual? These are examples of poor customer service that I'm sure you've experienced. If you're anything like me you'll think, 'Surely you can do better than that?' The concept of customer service has existed for such a long time now that it is considered quite basic, and there is no reason why customer service shouldn't be second nature.

But what, I hear you ask, has this got to do with service management. Well, you can think of service management as *customer service* for IT people. Customer service is a simple principle, one that says: find out what your customers want and give it to them – within reason. This principle should apply to computing and IT systems.

Seeing why IT service users complain

This book is about improving the management of IT services in order to improve the provision of IT services. A good starting point is to understand the users', or customers', point of view.

Pretty much everyone has a computer at home, often more than one. I remember, many years ago, laughing at a friend who had a computer network in his home. 'You must be a real geek', I said. Now I'm writing this book on one of the three computers (not including smartphones and e-book readers) that are in constant use in our house and are networked together. Who looks foolish now?

What's more, I live in a remote part of the UK, yet I'm still connected to the Internet by broadband; in fact I rely on it. When my broadband connection fails, I rant and rave at the provider, berating the organisation for not understanding my needs, and urging it to work faster to restore my service.

The point is that one of the difficulties associated with providing IT services is that customers have high expectations; because IT is so prevalent in modern times, users feel that provision is straightforward.

And whereas IT used to be the domain of the few geeks that took an interest in computers, now it's everywhere. Very few businesses don't rely on IT in some way, if only for sending emails or using the Internet. Most people have computers at home and know what they can do, therefore when they go to work or use other IT services, they have high expectations.

Understanding the IT provider's point of view

Providing IT services that please all users, all of the time, is a challenge because:

✔ **IT is complex:** IT systems aren't simple to set up and run, and users expect many different types of technology to work together.

✔ **IT is always changing:** IT systems change constantly with new upgrades, software applications and technologies appearing every week.

✔ **Users' needs change:** People use IT systems to help them do business, so as the business needs change, so do the requirements of the IT systems that support them.

IT providers therefore have to deal with constantly changing technology, constantly changing customer needs and high expectations.

Why can't customers and IT just talk to each other?

Customer service is about finding out what your customers want and giving it to them, so why don't the customers and providers just talk to each other?

I often I hear the following kind of exchange:

✔ IT says: 'The customers don't know what they want!'

✔ The customer says: 'IT people just talk jargon, they don't understand our business!'

In many organisations the IT department is thought of as just providing technology, not providing a service. So IT is just a bunch of technical experts providing IT systems. The IT department's view is that IT is specialised so only the experts know what you can have; therefore you get what you're given.

You may be thinking that this is an old-fashioned view of IT and times have moved on. Well, I assure you that through the training work I do, I meet many IT staff and users from many organisations who still think this way.

Improving IT services

The best way to improve IT service provision is to take a look at people and companies that do it well. A great idea, but difficult to know where to start. Well, wouldn't it be great if someone took all the experience and advice from many organisations and individuals who've been managing IT services for a while and put it in a book. Ta da! It's been done, and the books are ITIL.

The benefits of books such as the ITIL publications is that the advice in them is proven. The recommendations are not just theoretical: this is stuff that people have tried and actually works. It is a proven way of doing things.

ITIL's proven way of doing things has a lot to do with processes. Put simply, a *process* is a way of doing something. If you have agreed ways of doing things in your organisation, you're more likely to do things consistently and accurately, and achieve what you intend to achieve.

This book contains descriptions of all the main ITIL processes; most of them are in Part II.

Understanding ITIL: Best Practice Guidance

ITIL is an acronym, and when it was first established it stood for the Information Technology Infrastructure Library. But although people still use the acronym ITIL, you no longer find the definition in the ITIL books. I guess this is because the scope of ITIL has gone well beyond just the IT infrastructure.

Anyway, I'm less interested in what ITIL stands for and more interested in what it is:

- ✔ **Five books:** The core ITIL publications
- ✔ **Complementary guidance:** A set of publications that provide specific guidance to industry sectors or types

The books are a source of best practice for service management. *Best practice* provides some good ways of doing things. A bunch of people who have done this stuff have put their heads together and said 'Here are some of the things we have done and they work, why don't you have a go.' I don't mean to make it sound haphazard: ITIL has been carefully honed and developed over 20 years by industry experts. It is now a body of knowledge that represents guidance on how to manage your IT services.

The five core ITIL books are great but are quite thick and big – they're excellent reference books. *ITIL For Dummies* gives you an easy-to-digest description of the five core ITIL books and the processes that they contain.

The benefit of public frameworks such as ITIL is that the guidance has been verified across many industry types and organisation types, and so is easily transferable.

So what are the benefits of using best practice guidance? The benefits of best practice guidance are that it:

- ✔ **Can be adopted and adapted:** You can adopt the ITIL processes and practices and adapt them to suit your organisation.
- ✔ **Improves efficiency:** You can improve efficiencies in your organisation.
- ✔ **Satisfies customers:** You can increase your organisation's ability to provide services that meet the needs of your customers.
- ✔ **Is scalable:** One size fits all. It doesn't matter if you have three people in the IT department or 3000, ITIL is just as applicable.

The benefits of best practice include the fact that ITIL is for any service provider regardless of size, type of industry. Any organisation can improve what it does. So it doesn't matter whether your organisation is public sector or private sector, is manufacturing, service industry or financial– ITIL can still help.

Is ITIL for individuals or just the management teams? ITIL works best if the concepts and processes are adopted by the whole IT organisation. But this doesn't mean ITIL is aimed only at management. The management team must rely on their staff to perform the service management practices and make ITIL work.

From the point of view of an individual, even if your organisation doesn't intend to implement ITIL, it is still a great thing to understand. To have an ITIL qualification on your CV is a good thing.

Piecing Together the Jigsaw: The Content of ITIL

The ITIL guidance is all about managing IT services. I consider and describe four main elements in the chapters of this book:

- ✔ **The service lifecycle:** The life of an IT service from inception through a development project and introduction into day-to-day use
- ✔ **Processes:** Sets of ways of doing things
- ✔ **Functions:** Organisational departments – the source of the people who do the stuff needed to manage IT services
- ✔ **Roles:** Sets of responsibilities allocated to people or departments

I talk about processes, functions and roles in Chapter 2.

The ITIL guidance is structured around the service lifecycle, which I overview in Chapter 3. IT services don't just appear one day fully formed. If you want your IT services to meet the needs of your business then careful thought and planning must go into the development of those services, not least an understanding of how the service supports the business processes.

The service lifecycle consists of five stages, and ITIL dedicates a core publication to each. This book concentrates on these five core books:

- ✔ Service strategy (see Chapter 4)
- ✔ Service design (see Chapters 5 and 6)
- ✔ Service transition (see Chapter 7)
- ✔ Service operation (see Chapter 8)
- ✔ Continual service improvement (see Chapter 9)

REMEMBER

At the heart of ITIL is a set of processes. It is the processes that make ITIL flexible. If I told you that in order to provide good IT services you must have 10 staff employed on your service desk and another 20 in second-line support, you would put this book down now. However, if I described a way of doing things that provides a number of coordinated activities that you can allocate to your existing staff, you might be more prepared to listen.

Debunking Some Common Misconceptions about ITIL

Over the years I've heard many reasons, in some cases excuses, as to why companies haven't adopted ITIL, or why they think ITIL won't work for them. I cover some common myths about ITIL in the following sections.

Treating ITIL as training only

I have trained many people in ITIL, and I'm pleased to see that many attend the foundation course as part of an awareness project (more on ITIL training in Appendix A). What concerns me is that the training course is sometimes viewed as just training to improve someone's skills, without realising that it should be paving the way for the implementation of the ITIL processes.

For ITIL to provide benefit to your organisation, the processes and practices should be adopted and implemented in your IT organisation. I describe how to implement the ITIL service management processes in Chapter 10.

Misinterpreting ITIL

Occasionally, people see what they want to see in ITIL. ITIL isn't a methodology and it's not prescriptive. It is guidance. Therefore, by its very nature it is open to interpretation and therefore also open to misinterpretation. I have heard stories of organisations that have implemented ITIL to the letter, doing *exactly* what it says in the books. They're missing the point.

You must understand ITIL and then adapt it to suit your organisation. There are some things you shouldn't change, such as the basic process flows; but how the activities that form the processes operate in your organisation is up to you to decide.

In Parts I and II of this book I provide guidance on how to interpret ITIL. Part III focuses on practical application.

Thinking ITIL is for the service desk and support staff only

ITIL is often perceived as being for customer- or user-facing people only. Or only for day-to-day operations people. I don't know where this idea comes from; however, it's not true. I have known delegates on my training courses who are developers or technical specialists and who state that they don't know why they've been sent, because ITIL is not relevant to them.

Everyone in IT has some involvement in providing the IT services to the business, and it is important that all staff are aiming to achieve the same ultimate goal.

Believing that processes introduce unnecessary bureaucracy

No, they don't. Without good processes, your organisation is probably wasting time, money and other resources. If your processes are considered to be bureaucratic then I respectfully suggest that there may be something wrong with them. Maybe they're not well written, or perhaps the reason and need for processes has not been properly communicated to the necessary people.

The ITIL guidance is just that– guidance. You should develop your processes in such a way that they work for your organisation.

Assuming that ITIL uses a lot of time, staff and money

Don't fall into the trap of thinking that ITIL requires your organisation to employ many more staff. This is untrue. The best value is to be obtained from using your existing staff in better ways. The processes that I describe include activities that can be performed by your existing staff. The processes will ensure that you staff are focussed on the important things – like providing IT services to your customers.

It is true that it will take time, money and commitment to implement the ITIL practices, and you should develop a sound business case before starting.

Appreciating the history of ITIL

ITIL first appeared in the late 1980s and was published by the UK Government department known as the Central Computer and Telecommunications Agency (CCTA). The CCTA was later absorbed into the Office of Government Commerce (OGC) which was, until 2011, the Government department that promotes best practice in industry. In 2011 there was a further UK Government reorganisation which meant that the ownership of best practice, including ITIL, moved to the Cabinet Office.

When it was first published, ITIL consisted of 10 core books and a further 30 complementary books. In 2000/2001 the ten core books were rewritten as two, followed over the next few years by a number of others. Later, the ITIL 2007 edition was published (known to many as ITIL Version 3). The major advancement of this (and the current) version of ITIL is that all the material has been rewritten and brought into five volumes structured around the service life-cycle. This emphasises the fact that no area of an IT organisation can divorce itself from the understanding that it plays some part in providing services to the organisation's customers.

In the ITIL 2011 edition, the books were updated to consolidate the improvements made in the 2007 refresh and improve consistency across the core books.

All this reference to versions is confusing – I'll just call it ITIL!

Taking the ITIL Qualifications

You can obtain a number of qualifications to prove that you know something about ITIL. The ITIL Foundation Certificate is the starting point for anyone wanting to become qualified in ITIL service management. You can find lots of details about the qualifications in Appendix A.

Parts I and II of this book include material that covers the syllabus of the foundation qualification. That's not to say that by reading this book you pass the exam. That depends on who you are, your background and your experience. No substitute exists for a well-run training course to bring the material alive. (I'm a trainer, therefore I'm bound by oath to tell you that!)

For those of you wanting to take the foundation exam only, you may find reading the five core ITIL books like using a sledgehammer to crack a nut. Happily, this book explains the main concepts and information to give you an introduction to ITIL without having to navigate the five core books. But after you've read this book and whetted your appetite, have a go. Read the proper ITIL books.