Integrating Service Management (ITIL) and Project Management

3rd Annual Professional Development Days!
May 17-18, 2017
You will learn

- Interaction / Integration between Project Management and Service Management lifecycles and activities.

- Role and importance of the Service Design Package (SDP) in project success.

- How collaboration between Project Management and Service Management resources will lead to greater value for the organization.
Why do we need to integrate Project Management and Service Management?

➢ Is it normal that Project deployment sometimes come as a surprise to the IT Operations team?

➢ Is it normal that sometimes Projects are delivered with ‘missing components’ and now Operations must fix it?

➢ Is it normal that projects are delayed or blocked because Operations were not ready?

➢ Should IT (both Project and Operations) be blamed by users because we did not meet all of their expectations of a smooth project delivery and support?
Where in ITIL would be the connectors to PPM?
Objectives of Project Management

Project management is the process and activity of planning, organizing, motivating, and controlling resources, procedures and protocols to achieve specific goals in scientific or daily problems. A project is a temporary endeavor designed to produce a unique product, service or result with a defined beginning and end (usually time-constrained, and often constrained by funding or deliverable, undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value).

The temporary nature of projects stands in contrast with business as usual (or operations) which are repetitive, permanent, or semi-permanent functional activities to produce products or services. In practice, the management of these two systems is often quite different, and as such requires the development of distinct technical skills and management strategies.

The primary challenge of project management is to achieve all of the project goals and objectives while honoring the preconceived constraints. The primary constraints are scope, time, quality and budget. The secondary —and more ambitious— challenge is to optimize the allocation of necessary inputs and integrate them to meet pre-defined objectives.
Objectives of IT Service Management

IT Service Management is ‘the implementation and management of quality IT services that meet the needs of the business. IT service management is performed by IT service providers through an appropriate mix of people, process and information technology.’

Objectives of Service Management:

- Adequately designing IT Services to meet strategic and operational needs of the business
- Ensuring smooth implementation new services and maintenance of existing IT services
- Support daily usage of the IT services by business users
- Enable proper monitoring and measuring of IT service quality to support continual service improvement
Objectives of Change Management (ITSM Change Management)

- Respond to the customer’s changing business requirements while maximizing value and reducing incidents, disruption and re-work.
- Respond to the business and IT Requests For Change (RFC) that will align the services with the business needs.
- Ensure that changes are recorded and evaluated, and that authorized changes are prioritized, planned, tested, implemented, documented and reviewed in a controlled manner.
- Ensure that all changes to configuration items are recorded in the configuration management system.
- Optimize overall business risk — it is often correct to minimize business risk, but sometimes it is appropriate to knowingly accept a risk because of the potential benefit.
Some differences between Project Management and Service Management

<table>
<thead>
<tr>
<th>Project Management</th>
<th>Service Management</th>
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<tbody>
<tr>
<td>focuses on one <strong>BIG</strong> change</td>
<td>considers the impact of all the changes taking place</td>
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<tr>
<td>A Project has a beginning and an end</td>
<td>Focusing on the reliability of the new services but also the stability of the hosting environment</td>
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<tr>
<td>Projects will often use temporary resources</td>
<td>A Service has a beginning but no specific end (until it is decommissioned)</td>
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<tr>
<td>The primary concern of Project Management is to respect the constraints (budget, schedule, resources and quality)</td>
<td>Service is mostly managed by permanent resources</td>
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<tr>
<td></td>
<td>The primary concern of Service Management is to ensure delivery of value through effective use of IT Service</td>
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Concerns if Change Management and Project Management are not well integrated (via SDP)

- Projects could deliver new services or modified services without sufficient involvement of operational resources, resulting in:
  - **Project retrofit** to match operational standards
  - **Inability to support the new/modified services**, leading to users and clients dissatisfaction
  - **Extra efforts to deal with last minute modification** to project or to operations in order to address operational issues
  - Possibly increasing a disconnect between;
    - Project Culture (i.e. deliver solution within budget, schedule, resources available)
    - Service Culture (i.e. services stability, sustainability, supportability, minimal disruption to the business, delivering more than just technology)
A change to a service should either be triggered or leave an early trace in the Change Management process to ensure it is able to “protect” the stability of ALL the systems and IT Business Services.

Change Management Process would allow (through its Change Review/CAB) to assess possible impact the Change/Project could have on the stability of the IT Services and how they are supported.

Change Management is concerned about overall Service Quality:
- Technical fit with the rest of the operational standards
- Supportability of the Service and Technology
- Need for communication and training for the users and IT staff
- Capacity of the New/Change service as well as the surrounding systems
- Security of the information
- …
Project Management Process – and Service Management Lifecycles

Control

Initiate ➔ Plan ➔ Execute ➔ Close

Strategy ➔ Design ➔ Transition ➔ Operation ➔ Continual Service Improvement

Service Design Package (SDP)
Project Management Process – and Service Management Lifecycles

Another possible view for bigger projects…
Service Transition: A stage in the lifecycle of a service. Service transition ensures that new, modified or retired services meet the expectations of the business as documented in the service strategy and service design stages of the lifecycle.

Service Design Package (SDP): Defining all aspects of an IT service and its requirements through each stage of its lifecycle. A service design package is produced for each new IT service, major change or IT service retirement.
Service Design Package (SDP)

- Follows a service through its lifecycle from initial proposal to retirement
  - Once Created, the SDP remains a ‘service artifact’ that will be controlled by Change Management.
  - When a project revisits a service, the existing SDP is consulted and revised.
- Contains all the information required to manage a specific IT service
- Specifies the requirements from the viewpoint of the client (not IT) and defines how these are actually fulfilled from a technical and organizational point of view
- When created properly, SDPs bring a lot of value to both IT and the business
# The Service Design Package content

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-category</th>
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<tbody>
<tr>
<td>Requirements</td>
<td>Business requirements</td>
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<td>Service applicability</td>
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<td>Service contacts</td>
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<td>Service design</td>
<td>Service functional requirements</td>
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<td>Service level requirements</td>
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<td>Service and operational management requirements</td>
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<td>Service design and topology</td>
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<td>Organizational readiness assessment</td>
<td>Organizational readiness assessment</td>
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<td>Service lifecycle plan</td>
<td>Service programme</td>
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<td>Service transition plan</td>
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<td>Service operational acceptance plan</td>
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<td>Service acceptance criteria</td>
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Content of the SDP, (A Comprehensive Recipe)

➤ Part I: Header
➤ Part II: Detailed Requirements Specification as a Basis for Service Transition
➤ Part III: Service Operation and Improvement
➤ Part IV: Technical and Organizational Implementation Blueprint (*including the Service Acceptance Criteria*)
➤ Part V: Transition Planning Information

Reference: IT Process Wiki

Service Acceptance Criteria

The **Service Acceptance Criteria (SAC)** set of criteria used to ensure that the service meets its expected functionality and quality and that the service provider is ready to deliver the new service once it has been deployed.

Each criteria listed should also determine who is responsible that the criteria is fulfilled.

Typical SAC would cover the following area:

- Functional
- Availability
- Capacity
- Support and Knowledge Management
- Information Security
- Service Continuity
- SLA
- External Contracts
- Monitoring
- Management Metrics
Example of Service Acceptance Criteria

▶ Has the SLA/SLR been reviewed, revised and agreed with all concerned parties (Resp.: Service Level)?
▶ Have all test plans been completed successfully (Resp.: Test Manager)?
▶ Have all the new suppliers been identified and their associated contracts drawn up accordingly (Resp.: Supplier Management)?
▶ Have all RFCs and release records been authorized and updated (Resp.: Change)?
▶ Have appropriate technical support documentation been provided and accepted by Incident, Problem and all IT support teams (Resp.: Incident, Problem)?
▶ Have all users been trained, and has user documentation been accepted and supplied to all users (Resp.: Project Manager)?
▶ Have appropriate business managers signed off acceptance of the service (Resp.: Project Manager)?
**SDP as seen through the PM lens**

- **Phase 1 – Initiation and Planning Phase**
  - Stakeholder and Power Matrix

- **Phase 2 – Execution Phase**
  - Requirements
    - Requirement documents (SAC)
  - Design
    - SDP start
    - Solution Design documents
  - Testing
    - Test Strategy and Test Plan (SAC)
  - Training
    - Operational Readiness

- **Phase 3 – Transition Phase**
  - Implementation Plan
  - Communication Plan
  - SDP complete

- **Phase 4 – Closure Phase**
SDP as seen through the ITSM lens

Initiated at the Service Design stage
  • Passed from Service Design to the Service Transition stage to provide all information required to develop the service solution
  • Ensuring that Service Design meets service outcomes required by the Service Strategy

Completed at the Service Transition stage
  • Fine tuning and detailing the content of SDP before we operationalize a service

Service Transition, Service Operation, and CSI provide inputs to the requirements in the SDP, ensuring services get better as time goes on.
A Collaborative Approach

- Facilitated through PMO practice
  - Engage appropriate resource
  - Comprehensive definition of Service (SDP)
  - Clearly defined deliverables
- Governed and Supported by ITSMO
  - Process and Service walk through
  - Change controlled
  - ITSMS enablement
Benefits of using the SDP as integration between PM and SM

- Improves the quality of services
- Improves decision-making from both PM and SM standpoints
- Makes implementation of new or changed services easier with less surprises
- Improves alignment of services to the business
- Makes service performance more effective
- Improves IT governance
- Makes ITSM more effective
- Reduces Total Cost of Ownership (TCO)
Benefits of that approach

- Allow Operations (through involvement during the initial SDP review and on the CAB) to see Project coming much earlier and be able to:
  - Ensure Operational standards and supportability have been considered by the project
  - Ensure that service sustainability is considered in the project planning and budget (before it received Client’s authorisation)
  - Prepare its staff and process to welcome the result of the project

- Allowing Project Management process to capture all aspects of the service to be delivered and use a collaborative approach to deliver it.

- Allow each process to focus on their respective objectives and measure their achievement
  - PM: Delivering project outcome with quality in mind, in respect to constraints
  - CM: Ensure IT systems can be supported, maintained and improved

Note: the involvement of the ‘Service Owner’ across the project and service lifecycle will ensure ‘smoother’ touch points between the processes
Summary

- IT and business would benefit from considering Projects as ‘Big Service Changes’
- Project Management process and Service Management processes should be designed to be complementary to one another… avoiding duplicate responsibility when possible.
- People have multiple roles and take part in multiple processes
  - Project Managers should be involved in the Change Management process, not only in the Project Management Process…
  - Change Managers should coordinate with Project Manager
- Service Design Package is a key deliverable to integrate project management and service management
- Measure the extent of project success… Find ways to measure how projects are impacting the stability of Services… though Change Management.
Thank you!

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