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You've Completed ITIL Foundation: Now How to Implement It

You've Completed ITIL® Foundation: Now How to Implement It

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Your team has just finished ITIL® Foundation training, and you're wondering, "What now? How and where do we begin implementing this ITIL framework in our business?" Ah, but this is putting the proverbial cart before the horse.

It takes a concerted focus on **people, process, and technology** to plan and implement ITIL and an ongoing, cost-effective and valuable IT service management (ITSM) practice.

People: in your IT functions (the service desk, technical and application support, and IT operations). When entering an organization, people start out as a resource (raw material); training and skills development mature your people groups into capable teams that have the ability to carry out your ITIL initiative, execute your processes, and deliver the value to customers and users. Without an ongoing training program that is a part of your initiative and for each position, *your ITIL initiative is at risk.*

Process: such as incident management, request fulfillment, change management, and so forth. An ITIL initiative should result in activities that convert undocumented and ill-equipped immature processes into mature processes that affect more efficient operations, lower costs, and higher performance to target goals and objectives. However, keep in mind that processes do not carry out themselves; *they require skilled and knowledgeable people*—practitioners and managers—along with supporting technology and tools to be carried out efficiently and effectively.

Technology: essential for implementing ITSM and ITIL. In fact, one would be hard-pressed to identify a stage in the service lifecycle, or a process, *that would not benefit* from the application of service automation or technology. However, as the saying goes, "a fool with a tool is still a fool." The proper application and use of technology *cannot* be realized unless one trains the technical, application, and operations staff in the implementation, use, and maintenance of such technology. Because automation tools are constantly evolving, training on the efficient use and application of this enabling factor must be done on an ongoing basis.

Notice how *people* play a critical role beyond that of a resource and a capability (to the extent you train and equip them). People are critical to the successful implementation of processes. Without trained and skilled people, processes cannot operate at their full potential. People are also essential to the successful roll-out of supporting technology and tools. And yet it's the people that often get overlooked!

Why Go Beyond ITIL Foundation Training? People *Resources* Must Be Transformed into People *Capabilities*

While processes and technology play key roles in ITSM, *the role of people resources and capabilities cannot be understated.* Poorly trained managers and staff will lack the understanding and motivation to drive the ITIL initiative forward, which puts the success of IT Service Management in your organization at risk. They will also lack the skills and knowledge to plan and carry out the implementation of the processes and establish functional teams both effectively and efficiently.

With a concerted training program, and a training plan for each role, your team will become a unified powerhouse that will propel your ITSM initiative to success over the long-term. Service and process owners will understand and carry out their roles effectively, ensuring that quality robust services are defined and delivered while supporting processes are there to guarantee the quality delivery of your services. Practitioners—the individuals and teams carrying out the various steps of your processes—will have the skills and understanding to execute those processes consistently and efficiently, delivering high availability and performance of your services.

With staff only completing basic ITIL Foundation level training, **you will lack the skilled people capabilities in place to truly be successful with your ITIL initiative.** Instead, you've only established the foundation for the training component of your initiative.

The Critical Initial Steps of an ITSM/ITIL Initiative

Setting the High-Level ITSM Vision

An initiative to implement ITSM and the ITIL framework of best practices must be part of your overall IT strategy. An ITIL initiative should provide a clear vision, mission, and goals while answering the key questions, "Why are we doing this as part of our long-term IT strategy? How does this benefit IT as well as the parent organization and the customers we serve?"

The answers are obvious and well documented in the ITIL core volumes and other complementary publications. ITIL is a proven set of best practices for ITIL that lowers costs, improves quality IT service provision, facilitates compliance with industry regulations, and closes the gap between the business and IT. Your parent organization, and the various business units you serve, will benefit through greater availability of IT services that support business processes, quick restoration of any service outages, more frequent improvements in service functionality, and closer alignment between business and IT objectives.

Identifying the Pain Points and Opportunities

Once the high-level ITSM vision is set, the next step is to gather information on the "pain points" in your service organization. Seek to identify what is not working well and where the major opportunities are for improvement. This can be done through focus groups and discussions with internal teams as well as by obtaining feedback from customers and users through various channels. Periodic service review meetings, assuming those are in place, will be a valuable means for achieving feedback from customers. Ongoing and periodic customer/user surveys can also be a useful means of identifying pain points or opportunities for improvement. Examples of such pain points and opportunities might include:

- a critical IT service that is failing too often relative to customer and user expectations and existing SLAs in place
- a "broken" or nonexistent process; for example, functional escalations from the service desk to other IT support groups that go into a "black hole," thereby leaving the service desk without effective Tier 2 support
- a key function such as the front-line service desk that is being called the "helpless desk" by customers and users, due to a lack of attention to equipping that function with the right resources and capabilities

The Assessment: Answering the Question "Where Are We Now?"

Once the initial information gathering is complete concerning perceived pain points and opportunities, carry out a best practice assessment to pinpoint specific areas (people, process, or technology, or some combination thereof) that need improvement. Determine the scope needed for your assessment:

- You may choose to do just a process assessment if it appears that your pain points are all relative to a specific process area.

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- If it's not clear that the pain is related to a specific process or group of related processes, you may choose to do a people, process, and technology assessment, which evaluates all the key elements in a particular area. Examples include the people, process, and technology employed to carry out change management or the people, processes, and technology involved with providing service desk support.
- Conducting a full assessment may be your preferred choice. A full assessment goes beyond evaluating the areas of people, process, and technology by looking at strategy, goals and objectives, and the culture in place within the organization.

Your assessment should result in an identification and confirmation of the specific pain points and improvement opportunities in your organization, along with a prioritization of the areas to be addressed, e.g., initial "quick wins," tactical improvements and strategic long-term improvements.

Your ITIL Initiative Begins with Phase 1: Targeting an Achievable, Visible "Quick Wins"

Use the results of your assessment to create a compelling business case for implementing ITSM/ITIL and the Phase 1 project of your ITSM initiative. For example, your assessment may have shown that customers and users are complaining about your "helpless desk" and contacting other members of IT directly to get their questions or issues addressed. This results in poor IT staff utilization, high costs, longer resolutions times, and high customer/user dissatisfaction. More importantly, this is a highly visible pain point to both customers and users. It's clear from the assessment that specific, actionable steps to improve people management, key service desk processes, and supporting technology and tools will result in a relatively quick win. Such a project will enable the transformation of a helpless desk into an effective service desk with lower costs, higher performance and greater customer/user satisfaction.

Why choose such an obvious pain point for the initial phase of your ITIL initiative? A "helpless desk" is a highly visible pain point to customers and users. It's been said that the help desk or service desk is the "image of IT" to both internal and external stakeholders, and a poor performing service desk can make all of IT appear incompetent. However, a service desk that communicates well, handles incidents and requests effectively and efficiently, and acts as the first line of support for IT can make up for shortcomings elsewhere within the IT organization.

Given this scenario, it's not difficult to see why you would choose Phase 1 of your ITSM initiative to be a plan to transform your help desk into a high-performing service desk with effective incident management, improved coordination between teams, faster resolution times, and more satisfied customers and users. Before moving ahead, conduct a baseline assessment of key indicators, and document specific, measurable improvements for your improvement plan of where you want to be. This plan will also include tactical activities to address the shortcomings in each key area: **people, process, and technology.** For example, tactical improvement activities to transform the struggling help desk might include:

- addressing staffing and scheduling issues to optimize and synchronize support resources with demand cycles
- ensuring that initial and ongoing training plans are in place for each position, and an ongoing training program is in place and funded to keep support skills sharp
- reviewing and updating the metrics and Key Performance Indicators (KPIs) in place to ensure the right things are being measured, and achievable targets are in place for response times, resolution times, and user satisfaction
- documenting core processes such as incident management and request fulfillment so that all support teams—the Tier 1 service desk, but also Tier 2 teams—are fully aware of their responsibilities, and how the processes ought to work

- reviewing and optimizing support tools such as the service management system for logging and tracking tickets, and monitoring and reporting tools that are used to inform stakeholders of performance to key targets

Your Phase 1 ITSM project is off and running. Now it's important to realize that two supporting activities must be engaged to ensure the success of your ITIL initiative: an effective communications plan and a supporting organizational change plan. Why is launching and carrying out a communication plan fundamental to success?

- It doesn't matter how well you are doing with the initiative if no one hears about it.
- A strategic change such as implementing ITIL best practices across an organization is usually met with a fair amount of skepticism: is such a push too ambitious and, thus, bound to fail? No one wants to be associated with a failing initiative. On the contrary, people want to be associated with winning programs.
- Consequently, it's critical that all stakeholders—customers, users, IT teams, affected suppliers—are informed early and often with news about the progress on your initiative. It's important they hear about early successes to build enthusiasm for your ITIL initiative, and to counter any doubts about its long-term success.

Projects associated with your ITIL implementation will also affect people's roles, responsibilities, and the way they carry out their daily work. New and improved processes will be documented and rolled out. A revised measurements and reporting framework will undoubtedly be introduced to measure the performance of key players in accordance with new metrics and KPIs. People's jobs will be impacted, and hence, the natural tendency will be for them to push back and resist such changes. Therefore, an organizational change plan must also be an integral component of your ITIL initiative.

The Role of a Communication Plan in Ensuring the Success of Your ITSM Initiative

Whether it's implementing improved change management, improving handling of routine service requests, or transforming an immature help desk into a high-performing service desk, your ITIL program is **going to require a comprehensive multi-channel communication plan.** Multiple stakeholders have a vested interest in this initiative; it is crucial to identify each, and determine how to keep them informed of progress to secure their on-going support.

A good communication plan and program is essential as it conveys the need for the program, explains its benefits, and keeps stakeholders informed as you move forward with each of the program phases:

- A successful ITIL initiative requires the support and involvement of many stakeholders: business unit customers and users; IT functional groups; suppliers; and potentially senior management. Stakeholders must understand why and how this initiative benefits them, and if they are to participate, what their role will be. (As an adviser? As a participant? Or as beneficiary of its implementation?)
- A comprehensive, multi-channel communications plan and program should be drawn up, launched, and executed over the long-term to drive home the reasons for the initiative, and to communicate the success of accomplishments as well as of the program in general.
- Messaging should be tailored to each type of stakeholder, so each understands the value to their role and what's in it for them.
- Multiple channels of communications should be used reactively and proactively to convey messaging to stakeholders. For example, an ITSM initiative website; social media channels; a regular email newsletter; and updates as a part of an "all hands" quarterly meeting or call.

- People are usually doubtful of organizational initiatives; your goal is to communicate early successes, spread positive "buzz," and keep the momentum going.

With an effective communications plan and program engaged, stakeholders will be informed, stay engaged, and realize the benefits that will accrue to them personally (or their team). You will optimize support for your initiative across all key stakeholders as you move forward.

An ITIL Initiative Also Requires an *Organizational Change Plan*

Implementing ITSM and ITIL in an organization means that people, processes, and technology will be affected. People will take on new roles and require knowledge and skill development through training. New and improved processes will be documented and set in motion. Additionally, new support tools will be acquired and deployed. These alterations to tools and processes will potentially affect the way people work, and when that happens, anticipate resistance. Why? Unless they are presented with a compelling reason for why they ought to change (this is where your communication plan comes in) and are equipped with tools, knowledge, and skills to transition to the new paradigm, people will naturally resist alterations to the way they have previously conducted business.

To counter this resistance and empower your ITIL initiative, an organizational change plan is required along with a strong cross-functioning team to lead and drive the long-term effort. The organizational change plan is the "engine" that drives the phases of innovation over time; the communications plan is a key part of implementing change by letting all the stakeholders know about plans, progress, and benefits that are accruing to each stakeholder.

To carry out an organizational change plan, it is generally a good idea to utilize a model that has proven successful in other implementations. Although the ITIL volumes contain a general model for planning and carrying out organizational change, a widely used and successful model is **"Kotter's 8 Principles for Leading Change."** Below is a summary of each of the eight steps of this model for carrying out organizational change:

1. **Establish a sense of urgency to make the transition to ITSM and ITIL.** Let all stakeholders know this change is strategically important to the organization. Transforming your organization by making these adjustments will increase your ability to provide high-quality services and support, increase your ability to compete in your target markets, lower overall costs, and enable a more agile and responsive service organization for the business and customers.

2. **Form a guiding coalition to lead and drive your ITIL implementation.** In *Good to Great* by James C. Collins, one of the major factors leading to a great organization was to "get the right people on the bus." The bus, in this metaphor, is the means to realize effective organizational change throughout your organization. The author points out that it's extremely important to get the right people on your bus (or team) even before you start moving down the road toward your destination (the implementation of change). Why? If you start with a team that does not have the right composition of talent, skills, and knowledge for the road ahead, it will take longer to come up to speed, will likely generate more internal conflict (compromising the team's effectiveness), and may even fail to get off to a good start! Here, we can see that effective training and equipping your people with the right knowledge and skills is essential to the success of a guiding coalition. Getting the right people on the bus—your process improvement planning and implementation project team—is critical to success.

3. **Create a compelling vision, mission, and supporting core values for moving to ITSM.** To be successful in a major organizational change initiative, you must not only communicate a compelling vision to all stakeholders initially during the launch, but also on an ongoing basis. Your vision statement portrays the

"future state" of the IT service provider organization, and the positive impact that the changes will have on IT and the organization in general. A supporting mission statement includes verbiage about how you will accomplish this vision on a daily basis. The vision and mission statements must speak to and resonate with all audiences, including support staff, management, users, customers and suppliers.

4. **Communicate the vision and benefits of ITSM initially and continually.** Having an effective communications plan is fundamental to the success of a major organizational change effort. Why? This change probably affects an array of stakeholders from operational support staff to technical and applications management teams, IT managers, and users/customers. It's important to communicate your vision and mission clearly across the organization so that all stakeholders get a sense of excitement, and are positioned to be supportive as they begin to see benefits accrue to them. It's also important that your message is tailored to each audience because when a big change is coming, there is always automatic *resistance.* The questions that arise in every stakeholder's mind are: "Why change?" "Why should I change my behavior and lend support to this?" and "What's in it for me?"

5. **Empower people to act on the vision.** People must be trained and equipped with knowledge and skills to act on the vision and carry out activities to complete the mission. This is where a concerted training program with a plan, or roadmap, for each position comes into play. A comprehensive training program enables people resources to be converted into people capabilities, able to design the policies and procedures for new and improved processes. The right practitioners with the right skills will be put into place to effectively manage the processes, ensuring a high level of quality with the delivery of your services to customers.

   Trained and well-equipped process owners and managers will be equipped to design improved processes; they will select the right supporting tools and technology that can then be used to facilitate process activities and deliver improved consistency. Trained support staff will have the required skills to make good use of the tools and carry out the procedures and work instructions effectively.

6. **Plan for and create short-term wins.** One of the challenges to overcome when launching and driving a major initiative like the adoption of ITSM and ITIL is the initial resistance and ongoing doubt about the likelihood of success for such an ambitious undertaking. It's human nature to love a winner, and one of the keys to success is demonstrating some wins early in the process of ITIL implementation. These early, visible accomplishments will create enthusiasm and a sense that the initiative will succeed as it moves forward. What sort of quick wins might you plan? For starters, announce the members of your ITIL initiative team—the "right" people who are to be "on the bus" driving the initiative forward. Then publish and promote the training program for certification and skills-building across the various teams.

7. **Consolidate improvement in** ITSM and produce further change. Once you have achieved some visible "quick wins," the ITIL initiative will begin to pick up momentum. Resistance will be less apparent, and an increasing number of service and support staff will begin contributing to and drawing value from improved service management capabilities. Staff will realize their jobs are actually easier, and they are becoming more productive in their jobs. This, in turn, will generate more enthusiasm. The goal is cultural change; to develop a "service mindset" as much as possible, through revised policies, procedures, and supporting tools and systems - so that delivering and supporting "services" becomes just a part of the way daily work is carried out.

8. **Institutionalize the new approach.** Incorporate principles of ITSM into your vision, mission, and core values. Ensure that your daily **policies and procedures,** or Standard Operating Procedures (SOPs), adequately support ITSM processes. Remember to hire, promote, and develop employees who support implementing the ITSM vision. Revise your orientation and ongoing training programs to include ITSM

training; ensure your reward and recognition programs honor those who regularly contribute improvements in services, processes, and supporting technology; furthermore, make ITSM a key element in your strategic planning.

How a Training Strategy Plays a Key Role in Accomplishing the Steps of Organizational Change

As one can see from the discussion above, creating and conducting a concerted training program and a training plan for each position should serve as **an integral part of your ITSM organizational change plan** because they address the critical people component. Your training program and training plans play a key enabling role in each step of the organizational change model we have just discussed above. To be more specific, here's how:

- **Establishing a sense of urgency means developing your people.** The trigger for your ITIL initiative should be for management to highlight the urgent need to move to an organization that can deliver value to customers through services. That new organization will require improvement in processes, technology, and tools, but, most of all, people—and the people of your IT organization <u>can look forward to training that will develop their knowledge, skills, and value</u> to both the organization and customers.

- **A guiding coalition for your ITIL initiative means trained, equipped leaders.** The leaders of your ITSM/ITIL initiative should be well-respected and, of course, well-trained (to at least Intermediate Levels) in ITSM and all aspects of the ITIL framework.

- **Add the words "continual learning" to your ITSM/ITIL vision, mission, and core values.** Creating a vision and mission statement for the initiative is obvious, so all stakeholders get a sense of the value and impact of this change. However, since a comprehensive training program is critical to transforming people into the skilled capabilities you will need, you may also want to include a phrase on continual learning in one or more of these strategy statements!

- **Knowing they will benefit through training and certification motivates individuals,** and thus teams, to actively support the ITSM initiative. A training program and individual plans for each position also addresses the need for personal advancement, and longer term career development, that most knowledge workers seek in their profession.

- **With a comprehensive training program and plan you are empowering people to act on the ITSM vision.** Individuals are equipped with ITIL Foundation level training initially, and then ITIL Intermediate level training matched to their role(s). Building on foundation training with tailored intermediate training provides staff with the knowledge and skills <u>to apply</u> the ITIL framework to their areas of responsibility.

- **Position the completion of ITIL Foundation training as a short-term win.** ITIL Foundation and Intermediate level training will be instrumental in ensuring the success of your ITSM program. Getting everyone through the ITIL Foundation training can be celebrated as an early "quick win", as it provides individuals with a common understanding of ITIL concepts, processes, and functions, as well as how to identify improvement opportunities.

- **Consolidating improvements, building these into policies and procedures, and moving your ITIL initiative ahead** with ITIL Foundation training provides a solid basis for your initiative. However, the ITIL Intermediate and Practitioner levels of training will provide the in-depth knowledge and skills to move ahead with <u>applying</u> the ITIL framework through each phase of the initiative.

- **Orientation as well as an ongoing training program help ensure the institutionalization of your new ITSM approach.** Once process improvements are made, improved people skills are in place, and new supporting engaged, your goal should be to "institutionalize" these improvements - to make these improvements an integral part of normal, daily activities. To accomplish this, integrate the improved practices into all aspects of daily operation: document the process improvements in your policies and procedures; configure your service management systems to support the improved processes; build the changes into your review and performance appraisal processes; update your on-boarding process so that the orientation training brings new employees up to speed on the new policies, procedures, and service management tools; and ensure that your measurements framework and reporting systems help you track compliance and performance of the new and improvement processes.

Key Elements of a Training Strategy that Empower Change

Your Training Program Must Be Targeted and Multi-Faceted

Having an overall training "program" that can plan, budget for, and carry out initial and ongoing training **for the key roles** that are to be part of your continuing ITSM practice is critical:

- IT executive managers—those who will plan and oversee the strategy for IT as well as the management of the key stages of the service lifecycle
- ITSM process owners—those who will own, plan, and resource one or more processes of the framework
- ITSM process managers—those who must be trained with the knowledge and skills to manage the operational activity of one or more processes
- ITSM practitioners—those who carry out the detailed steps of processes and must have in-depth training on how the processes should operate and how to optimize performance

Your ITSM training program should be strategic and long-term in nature and sufficiently funded with a training plan for each type of position that is required for your ITIL implementation (role-based training).

Types or Levels of Training that Must Be a Part of Your Training Strategy

- Foundation level training for the basics for a broad audience: all those materially participating in the ITSM/ITIL Initiative including managers, team leads, and practitioners on the service desk as well as in technical, applications, and IT operations groups
- Intermediate level training, equipping teams to apply ITIL: for process owners, managers, and practitioners that are involved with one or more phases of the rollout
- ITIL Practitioner level training: complementary courses to the ITIL Intermediate level training focusing on identifying and carrying forward improvements
- The Expert level track: not merely a training class but a level of achievement designed for ITSM program managers, consultants, and instructors in the ITIL framework

Targeting and Equipping Your People: Each Form of ITIL Training Has a Purpose

Each of the varying types of ITIL training classes has a specific purpose: complementing and building on one another. Below is a summary of the types of ITIL training that should be part of your overall program, see an illustrated version of the [ITIL certification roadmap](#).

- Equipping Everyone with the Basics: ITIL Foundation Level: The Foundation level is the entry-level certification that offers you a general awareness of the key elements, concepts, and terminology used in the ITIL service lifecycle including the links between lifecycle stages, the processes used, and their contribution to service management practices. This is your basic training, establishing a common vocabulary across teams, and positioning those directly involved in implementation to move ahead with

Intermediate level training, which is where they will be equipped with the knowledge and skills to successfully adapt and apply ITIL best practices to your environment.

- Beyond Foundation: Equipping Teams with ITIL Intermediate Level: The Intermediate level certification has a modular structure with each module providing a different focus on ITSM. Staff can take as few or as many Intermediate classes as they need based on their role(s) and the phase of the ITIL initiative they are taking part in. To be successful with your ITIL project phases, your training program MUST go beyond ITIL Foundation training. ITIL Intermediate level training will provide the knowledge and skills to process owners, managers, and practitioners involved in your projects to adapt and successfully apply the ITIL framework to your organization. The Intermediate level training is split into Lifecycle training and Capability training classes:

  - Lifecycle training—These classes are three days in length, and each one focuses on the content in one of the ITIL volumes: ITIL SS, SD, ST, SO, and CSI. These classes *are best suited to ITIL process owners and managers*.

  - Capability training—These five-day classes are more in-depth than the lifecycle module classes, and although there is considerable overlap, these classes *are best suited to practitioners* or those taking part in the detailed activities of a cluster of processes that work together. Classes include PPO, RCV, SOA, and OSA.

- Practitioner Level Complements the Intermediate Level: The Practitioner level course has been developed to provide significant hands-on training, improving the ability of individuals to identify improvement opportunities, and adapt ITIL in their organizations. Consider this for the *process managers and team leaders* of each of your processes.

- ITIL Expert Level: The ITIL Expert level qualification is aimed at those who are interested in demonstrating knowledge of the ITIL Scheme in its entirety. This is not a class but a certificate that is awarded to candidates who have achieved a range of ITIL certifications totaling twenty-two credit units and have attained a well-rounded, superior knowledge and skills base in ITIL Best Practices. *ITSM program managers, consultants, and ITIL trainers* should consider pursuing the ITIL Expert Level.

Going Beyond ITIL Foundation: Using a Project-Driven, Role-Based Training Strategy

Your ITIL initiative will proceed in project phases, each requiring roles to be assigned and training to be provided to equip people with the right complement of knowledge and skills to be effective. Of course, ITIL Foundation training needs to be provided initially across a broad base of personnel to give people underline basic training about concepts, terminology, and how the various processes and functions ought to work.

A successful training program that empowers an ITIL improvement project for success **requires more than basic training.** Practitioners must be provided with ITIL Intermediate level training for the in-depth knowledge and skills needed to carry out the detailed steps of the processes. Process owners must also be equipped with Intermediate level training to acquire the knowledge and skills to design and document the process they own, define and assign key metrics, and plan to properly resource their process. Process managers must also move beyond ITIL Foundation as these are the people in charge of daily operational management; they must be fully capable of managing and optimizing their processes.

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Example: Training Plan for "Phase 1: Help Desk to Service Desk Transformation"

Let's apply this project-driven, role-based training approach to our example mentioned earlier. Let's say your initial ITIL project phase is "Help Desk to Service Desk Transformation" in which you convert your "helpless desk" to a high-performing service desk with good incident management and request fulfillment processes. After you've completed your improvement proposal and supporting business case, you have received management approval to proceed. You are putting together the communications and organizational change plans. Now you need to plan for the training that can empower this change. Your supporting training program for Phase 1 should then include these key elements:

- ITIL Foundation level training for all practitioners, managers, and process owners involved with your Phase 1 implementation project. This is best for:
  - Tier 1 support staff on the service desk
  - Tier 2 technical and application management support teams
  - service desk managers, technical, and application management teams
  - incident manager and request fulfillment process owners and managers

- HDI Support Center Analyst (HDISCA) training, complementary to ITIL training, provides in-depth communication, troubleshooting, and "customer service" skills training. This is best for:
  - Tier 1 support analysts handling incidents and requests at your service desk

- ITIL Intermediate level training in Service Operation (SO) to train and equip your process owners and manager in the core processes of incident management and request fulfillment. This is best for:
  - the service desk manager
  - technical, application, and IT operations managers
  - incident managers and request fulfillment process owners and managers

- ITIL Intermediate Level Operational Support and Analysis (OSA) training to provide in-depth practitioner training for those managing the core ITIL processes executed by the service desk and other support teams. This is best for:
  - incident manager(s)
  - request fulfillment manager(s)

With this targeted and multi-faceted approach, your project plan to transition your help desk to a true service desk over the course of several months **will now be equipped for success.** Process owners will be able to properly adapt ITIL incident and request fulfillment to your operating environment. Assigned process managers will have the knowledge and skills to effectively manage the processes and optimize performance on a daily basis. What's more, your front line and back line support staff will have the communication and troubleshooting skills to perform well.

Incorporating basic, intermediate, and skills-based training into each phase of your ITIL initiative ensures the people who are tasked to plan, manage, and carry out these changes have the knowledge and skills to do so and perform well.

Why Take a Project-Driven and Role-Based Training Approach?
- It ensures that the right training is given for the right roles at the right time.
- Employees affiliated with your project phase gain confidence from training that focuses on equipping them for their roles.
- Through Intermediate level training, employees gain a deeper level of knowledge about how to apply ITIL practices relative to their roles.

- Training is engaged and aligned with the implementation of your ITIL initiative, so targeted training is provided in a timely fashion.
- With such an approach you are engineering your initiative for success.

Conclusion: Focus on the People, Then the Process and Technology!

It takes people, process, and technology to deliver an ITIL initiative that is successful. People come in as resources, but they must be <u>transformed into capabilities</u>: knowledgeable, skilled people who can carry out processes, manage activities, and ensure successful interactions with customers and users. Processes must be owned, planned, and resourced properly. Managers must be assigned to those processes and equipped with the knowledge and skills to effectively manage those processes. Without knowledgeable people skilled in the tools and technology that you plan to use, those tools will underperform and fail to meet expectations.

Implementing ITIL means communicating value and effecting an organizational change plan. You must prepare and drive a communications plan to multiple stakeholders outlining the value of moving to ITIL to each. People play a critical role in success, and your communications plan must answer the questions "What's in it for me?" and "Why should I change?" Including a comprehensive training strategy in your communications plan and organizational change plan will help answer those questions and give people a compelling reason to be on board with your initiative.

A training strategy empowers your organizational change plan by giving people the skills and knowledge they need to perform, a sense of heightened value, and the confidence to perform well. It also reduces risk of failure and helps ensure the success of your initiative from the initial quick wins to the roll-out of successive phases of the ITIL initiative.

With a concerted training program and a training plan for each role, your organizational change program will deliver the results. Your team will become a unified powerhouse that will propel your ITSM initiative to success over the long-term. Service and process owners will understand and carry out their roles effectively, ensuring quality robust services are defined and delivered, and supporting processes are there to provide the quality delivery of your services. Practitioners, those carrying out the various steps of your processes, will have the skills and understanding to execute those processes consistently and efficiently while delivering high availability and performance of your services. It takes people, process, and technology—and trained, knowledgeable, skilled people are the capabilities to aim for in your ITIL initiative!

Resources
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About the Author

Paul Dooley is the President and Principal Consultant of Optimal Connections LLC. With over thirty years of experience in planning and managing technology services, Paul has held numerous positions in both support and management. His corporate experience includes working for such companies as Motorola, FileNet, and QAD. He is also experienced in service desk infrastructure development, support center consolidation, deployment of web portals and Knowledge Management Systems as well as service marketing strategy and activities. Currently, Paul delivers a variety of services to IT organizations, including Support Center Analyst and Manager training, ITIL® Foundation and Intermediate Level training, Best-Practice Assessments, Support Center Audits, and general IT Consulting.
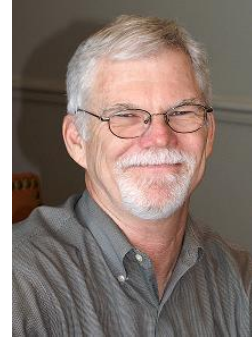
His degrees include a BA and MBA. Paul is certified in most ITIL® Intermediate levels and is a certified ITIL® Expert. He is also on the HDI Faculty and delivers training courses for ITpreneurs, Global Knowledge, Phoenix TS, and other IT training organizations. For more on Paul, visit www.optimalconnections.com.