

“YOUR COMPANY”

ITIL® 4

Proposed Engagement



ITSM Assist Limited
<https://www.itsmassist.com>

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Contents

Introduction	2
Context and spirit of this document.....	2
“YOUR COMPANY” Goals and Objectives	3
Situation analysis.....	3
Proposed actions.....	3
SMO.....	3
Workflows/Activities/Practices.....	4
Proposal	4
Terms of Engagement	5
Financial Details	6
Chargeable hours	6
Additional charges.....	6
Budget planning - Example.....	6
Conclusion	6

Introduction

This document provides a typical outline proposal based on setting up an initiative with a view of implementing IT service management (ITSM) best practice methodologies, principles, and practices within the workplace.

This document refers to a company known as “YOUR COMPANY” which is a fictional company, purely for the purpose of context and meaning only, and does not refer or relate to any company organisation bearing such a name or similar.

However, ITSM Assist Limited is a real-life company registered in England and Wales (company registration, 07618216), and an AXELOS®/PEOPLECERT® accredited training organisation (ATO) for ITIL®. For clarification, AXELOS are the owners of ITIL and PEOPLECERT are the appointed examination institute (EI) for AXELOS.

Furthermore, Trevor Wilson/myself (the author of this document and the founder/owner of ITSM Assist limited) is/am a real-life ITIL® accredited trainer certified to ITIL 4 Master Level and promote real-life working experience in IT and ITSM combined with governance for IT, and agile working.

This document has been divided into sections for ease of reference and understanding.

Context and spirit of this document

We often see a number of documented proposals based on ‘implementing ITIL for ITSM, or any other related framework that,

- Overlook or deliberately by-pass ‘People’, when in fact it is People that make things happen! In other words, realising concepts and/or resources are useless without capability. To avoid confusion, in the context of capacity people are indeed a resource however, in the context of skill, knowledge and experience people become a capability.
- Refer to such a framework as mandatory, when in fact these textbooks are not mandatory, they offer a guide derived from the “best-in-class” from around the world! These textbooks provide a public framework albeit designed to be adopted, however, to realise business value these textbooks should be adapted to the context and relevancy of the organisation.
- Think and design bottom-up instead of top-down! Meaning in the context of implementing ITIL best practice in the workplace, such solutions do not just become a bundle of silos but equally fail to promote a cultural fit. Whereas, taking a top-down approach, such a business aspiration is based on a culture comprising of strategies, goals, and objectives all of which should join-together to meet the aspiration of the business. A crude analogy could be, what is the point of promoting a vision based on customers benefiting from the “human touch” if all we do is put bots in front the of the customer!

“YOUR COMPANY” Goals and Objectives

In terms of IT service management (ITSM), “YOUR COMPANY” want to improve efficiencies both in terms of cost and effort and not to mention, reflect an improved customer and user experience (CX/UX).

In order to achieve these goals and objectives, “YOUR COMPANY” recognise the need to make things more visual, and more open to audit and measurement. However, to support achieving these goals and objectives “YOUR COMPANY” recognise the need to break-down silo working, and in turn promote a culture of collaborative working and thinking. Meaning, rather than teams just working towards their own individual goals and objectives, teams should collaborate working towards common goals and objectives, e.g., the organisation as a whole! In other words, “YOUR COMPANY’s” ITSM should adopt a mindset of succeeding or failing together, not in parts! All that said, “YOUR COMPANY” recognise that this is easier said than done.

Situation analysis

Following a recent online meeting with a number of “YOUR COMPANY’s” ITSM-related personnel, it became evident from the discussion that whilst everyone agreed that such improvements should be introduced, consideration should equally be given to ensuring “YOUR COMPANY’s” proven and valued activities remain agile. Meaning, not introducing unnecessary controls and bureaucracy which could restrict “YOUR COMPANY’s” ability to innovate, adapt and respond. In conclusion, the group accepted that the solution would be to strike a balance between making things more open to audit and measurement, and agility. In fact, it was recognised that such a balance would help “YOUR COMPANY” to become more agile through improving clarity between teams.

Proposed actions

To introduce, or more so, implement and integrate ITIL® ITSM practices, principles, and methodologies with “YOUR COMPANY’s” already proven and valued existing practices, principles, and methodologies.

In fact, rather than referring to ITIL, the focus should centre on implementing “YOUR COMPANY’s” very own branded ITSM framework (incorporating those existing proven and valued practices combined with adapting ITIL practices to “YOUR COMPANY” business context and relevancy). In other words, whilst we should Adopt public best practice frameworks such as ITIL and DevOps etc., we should Adapt these to the context and relevancy of “YOUR COMPANY”, thus creating a “YOUR COMPANY” framework!

SMO

It is proposed to introduce a “YOUR COMPANY” service management office (SMO). The SMO would become the custodian of ITSM for “YOUR COMPANY”, and in turn represent “YOUR COMPANY’s” centre of excellence for ITSM. In simple terms, the SMO would act like a parliament for ITSM on behalf of “YOUR COMPANY”.

The SMO does not have to be a physical office, typically, this would be a virtual office where “YOUR COMPANY” representatives (known as servant leaders) report about “YOUR COMPANY’ ITSM matters, thus becoming central to “YOUR COMPANY” regarding ITSM.

Typically, servant leadership is not a full-time role, such representatives of the SMO continue to work in their respective functional teams, however servant leaders think and act cross-functionally, and become a point of contact cross-functionally. In simple terms, whilst the SMO becomes like a parliament for ITSM, servant leaders in turn become like members of parliament (MPs) for ITSM.

Workflows/Activities/Practices

With such a “YOUR COMPANY” centre of excellence/parliament in place (SMO), it is proposed to start working on defining a “YOUR COMPANY”:

- Operating model, describing how products and services are produced.
- Workflows (value streams), describing services end-to-end, and how these value streams run through the operating model.
- Portfolio of activities/procedures (e.g., processes) along with the practices performing such work.
- Reporting framework.
- Service catalogue.
- Glossary of terms.
- Set of guiding principles

Note: the key is to start with a simplified view and then build and progress iteratively over-time accordingly.

Proposal

Whilst it should be highlighted that the role of ‘head of SMO’ or facilitator of ITSM best practice do not need to be full-time roles unless however, “YOUR COMPANY” prefer for these to become dedicated full-time roles. With this in mind, if at the outset “YOUR COMPANY” are unable to appoint a person to be looked upon as the central point of contact for the proposed SMO and/or facilitator of ITSM best practice, we/ITSM Assist Limited could assume such roles temporarily.

In addition, regardless of whether a “YOUR COMPANY” employee has been appointed to assume the aforementioned roles, “YOUR COMPANY” may require in the early stages assistance by the way of helping with the composition, production and not to mention consultancy, with a view of implementing and integrating the required ITIL-related practices, principles and methodologies. Over time however, such assistance will become less, to a point where “YOUR COMPANY” will only require such assistance from time-to-time.

Terms of Engagement

“Engagement Days:” means those days where ITSM Assist Limited is contracted to “YOUR COMPANY”. An “Engagement Day” comprises of a minimum of 4-chargeable working hours, and a maximum of 8-chargeable working hours. Exceeding 8-working hours will only occur with the prior approval of “YOUR COMPANY”.

“Engagement Contract:” refers to the number of “Engagement Days.” Each “Engagement Contract” can comprise of between 1 x “Engagement Day” and 10 x “Engagement Days” each calendar month. “YOUR COMPANY” can preschedule in advance, as many “Engagement Contracts” as “YOUR COMPANY” prefer throughout the year.

“Cancellation/Termination:” “YOUR COMPANY” can cancel any “Engagement Day” or “Engagement Contract” at any time without reason or notice, and without incurring any charges or penalty charges.

In summary, the above means,

- “YOUR COMPANY” can contract ITSM Assist Limited on an ad-hoc basis (e.g., as, and when) or with more consistency/frequency in mind, e.g., based on multiple prescheduled “Engagement Contracts” containing blocks of “Engagement Days” throughout the year.
- It should be noted ITSM Assist Limited’s availability cannot be assured unless an “Engagement Contract” is secured/scheduled.
- IT should also be noted that if “YOUR COMPANY” cancel/terminate more than 2 x “Engagement Days” within any agreed/scheduled “Engagement Contract,” or cancel more than 2 x “Engagement Contracts” before commencement, then ITSM Assist Limited reserve the right to terminate all future agreed/prescheduled “Engagement Contracts” accordingly.

Financial Details

Chargeable hours

Whether working remotely or at “YOUR COMPANY” site premises, “YOUR COMPANY” agree to pay for hours worked as follows: -

- The first 4-working hours within any single ‘Engagement Day’ = TBA plus VAT
- All additional hours worked within any single ‘Engagement Day’ = TBA plus VAT

Additional charges

- Where “YOUR COMPANY” request work to be carried at on the “YOUR COMPANY” site or any other “YOUR COMPANY” designated site within the UK, there will be an additional charge of TBA plus VAT per ‘Engagement Day.’ This is to cover for overnight accommodation, travel, and subsistence etc.,

Budget planning - Example

- “YOUR COMPANY” could form an initial budget of 10 x “Engagement Days”. These can be drawn as “Engagement Contracts” e.g., blocks of “Engagement Days” to suit, scheduled by mutual agreement (“YOUR COMPANY” and ITSM Assist Limited).
- Assuming 8-remote working hours are consumed within each “Engagement Day” would equate to a total budget of TBA plus VAT
- “YOUR COMPANY” will only be invoiced following completion of each “Engagement Contract” based on hours worked within each “Engagement Day.”
- “YOUR COMPANY” will not be obliged to consume budgeted “Engagement Days” within any specified timeframe.

Conclusion

The proposed budget promotes high levels of flexibility based on:

- The option to cancel/terminate at any time without incurring any charges.
- Making provision for carrying out baseline assessments and general consultancy.
- Making provision for agreeing the next future state and not to mention, composition, production, and execution to reach the desired/agreed future state.