

<The Company>

ITIL® 4

Proposed Engagement



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

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Introduction

This document provides an outline proposal based on a fictitious company, referred to as “The Company,” which could be translated as your company, based on achieving its current IT service management (ITSM) strategic goals and objectives.

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

The purpose of this document is to provide a true indication based on a typical situation analysis scenario when considering implementing best practice principles, methodologies, and practices. This document even includes a proposed engagement compete with financial details if we (ITSM Assist) were to take-up such an assignment. Albeit this proposal document is generic based on a fictitious company however, it will resonate with most real-life organisations.

This document has been composed by myself, Trevor Wilson of ITSM Assist Limited.

For peace of mind, I am an accredited ITIL® trainer certified to ITIL 4 Master Level, and the founder/owner of ITSM Assist, an Axelos®/PeopleCert® accredited training organisation (ATO). In addition, I equally, promote credibility and experience working with agile methodologies (e.g., Scrum), governance for ITSM (COBIT), quality in ITSM (ISO/IEC 20000) and more importantly, I have worked in IT most of my life. Furthermore, ITSM Assist is a private limited company registered in England and Wales and VAT registered.

The Company Goals and Objectives

Overall, “The Company’s” related-ITSM goals and objectives comprise of improving efficiencies both in terms of cost and effort and not to mention, to promote an improved customer and user experience (CX/UX), and equally to make ITSM more open to audit and measurement.

To achieve these goals and objectives “The Company” recognise the need to adopt a collaborative culture based on thinking and acting cross-functionally and making things more visual. In other words, adopting the guiding principle “collaborate and promote visibility”.

Situation analysis

It became evident from a recent group discussion that whilst everyone agreed such improvements should be introduced, consideration should equally be given towards ensuring “The Company’s” activities remain agile. Meaning, not introducing unnecessary controls and bureaucracy which could restrict “The 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 “The Company” to improve its agility through improving clarity between teams.

Comment

At a cursory glance, whilst “The Company’s” existing management and team structure cooperate, there is no evidence of a culture which promotes collaboration. Meaning, co-operation is working towards achieving personal and specific team goals and objectives, whereas collaboration is about working towards common goals and objectives in real time.

In addition, “The Company’s” senior leadership structure is designed to ensure strong governance however, it appears the reality is quite the opposite, due to senior leadership not having sufficient control. This is a result of senior leadership adopting a silo mentality itself, and/or through a lack of definition’.

1. To reinforce my point regarding senior leadership adopting a “silo mentality”. It is good practice to design top-down and implement bottom-up however, I suspect we are designing bottom-up and implementing top-down! The latter promotes competing and conflicting objectives.
2. To reinforce my point regarding “definition”. If you cannot define something then you cannot control it, if you cannot control something then you cannot measure it, and if you cannot measure something then you cannot manage it!

Proposed actions

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

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

SMO

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

The SMO does not have to be a physical office, typically, this would be a virtual office where “The Company” representatives (known as servant leaders) report about “The Company” ITSM matters, thus becoming central to “The 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 centre of excellence/parliament in place (the SMO), it is proposed to start working on defining:

- An 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.
- Activities/procedures (e.g., processes) along with the practices performing such work.
- Reporting frameworks.
- A service catalogue.
- A glossary of terms.
- A set of The Company guiding principles

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

Proposal

It is proposed to contract myself on a flexible arrangement by the way of one or more Engagements, with a view of supporting “The Company” senior leadership and respective “The Company” teams to facilitate the desired outcomes.

If at the outset “The Company” are unable to appoint a person to be looked upon as the central point of contact for the proposed SMO (otherwise could be referred to as the head of the SMO), and/or facilitator of ITSM best practice for “The Company”, myself (Trevor Wilson) could assume both roles temporarily. Neither role needs to be dedicated as full-time, e.g., one person can assume both roles amongst other roles. Unless however, “The Company” prefer these to become dedicated full-time roles.

Terms of Engagement

Terms used

Engagement Days: means those days where ITSM Assist is contracted to “The 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 “The Company”.

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

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

Please note:

- The above means “The Company” can contract myself either 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” throughout the year.
- It should be noted that my/ITSM Assist’s availability cannot be assured unless an “Engagement Contract” is secured/scheduled.
- IT should also be noted that if “The 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 reserve the right to terminate all future agreed/prescheduled “Engagement Contracts” accordingly.

Financial Details

Chargeable hours

Whether working remotely or at “The Company” premises, “The Company” agree to pay for hours worked as follows: -

- The first 4-working hours within any single “Engagement Day” = **£75 per hour** plus VAT
- All additional hours worked within any single “Engagement Day” = **£50 per hour** plus VAT

Additional charges (“The Company’s” premises)

- Where “The Company” request work to be carried at on the “The Company’s” premises or any other “The Company” designated site/premises within the UK, there will be an **additional charge of £300** plus VAT per “Engagement Day”. This is to cover overnight accommodation, travel, subsistence, and potential lost Revenue/ Engagement Days” caused through travel.

Conclusion

The proposal offers 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.