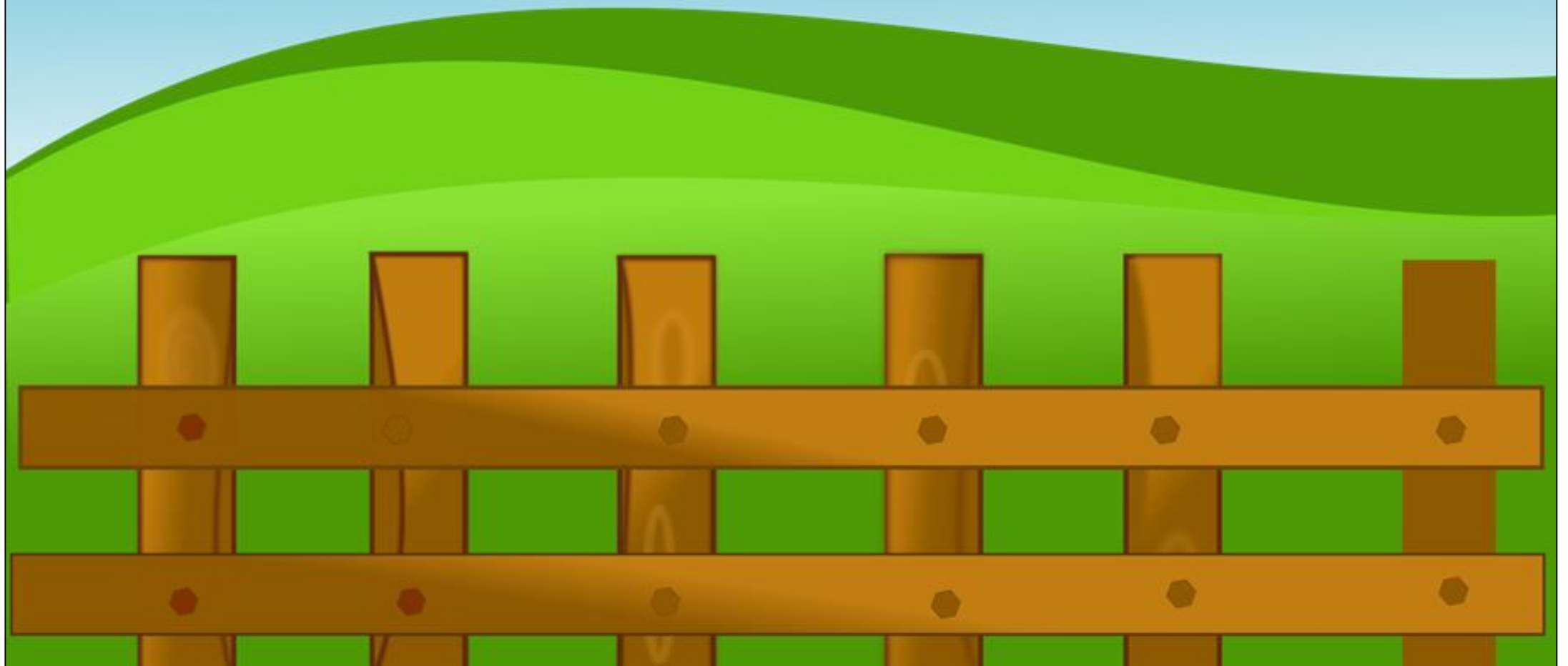


Service Transition

Introducing, Embedding & Improving



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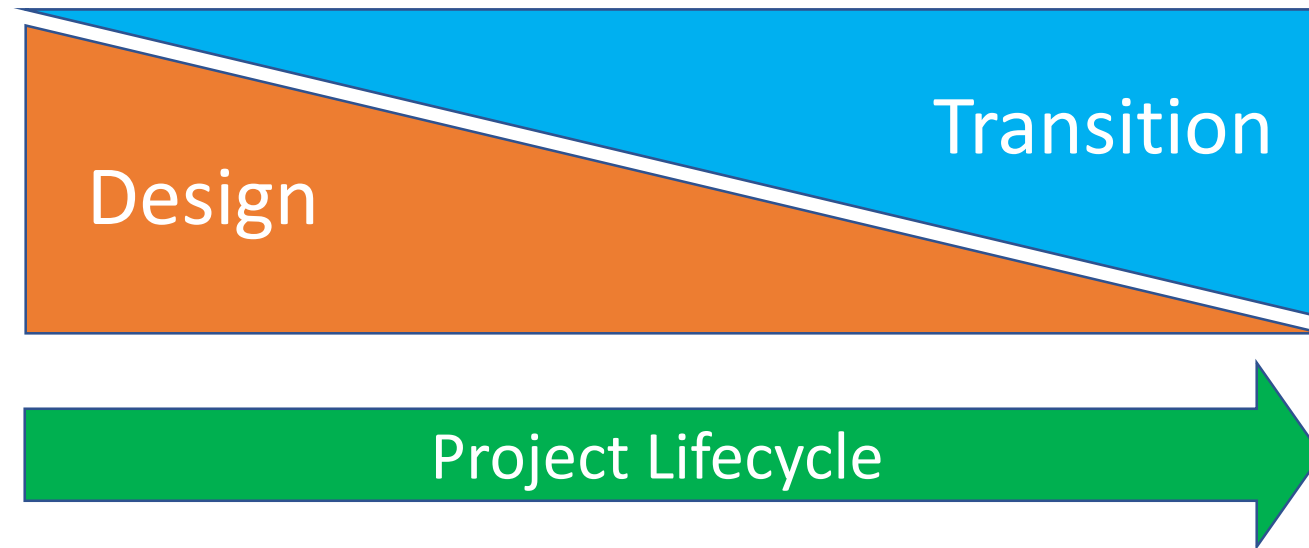
Agenda

1. The what
2. The why
3. The when
4. The how
 - I. How to introduce quickly
 - II. How to introduce for the longer term
 - III. How to embed as an official workstream
 - IV. How to embed further
 - V. How to improve
5. The agility

The What

Service Design & Transition (SD&T) governs how new and changed IT services are designed, delivered into live service and transitioned into Business as Usual (BAU).

Governance is managed via business specific Acceptance into Service (AIS) criteria aligned to the Service Design and Service Transition ITIL processes.



The Why

“To design IT services and to ensure new, modified or retired IT Services meet the expectations of the business.”

- ✓ Ensure project deliveries are fit for purpose
- ✓ Ensure project deliveries are supported and supportable
 - ✓ Ensure business stability is maintained

The When

Examples

- The introduction of a new Service / Service Component
- A change to the infrastructure design of a Service / Service Component
- The addition of functionality to a Service / Service Component
- A significant change to the user base of a Service / Service Component
- A change to a support process for a Service / Service Component
- The decommission of a Service / Service Component

How to introduce quickly

- Know the why
- Know who for; identify Project Delivery and BAU stakeholders
- Review IT Service Management vision / strategy (view to future alignment)
- Obtain buy in from Senior IT Management
- Assign owner / SME / point of escalation
- Create a “Service Readiness Checklist” covering (e.g.)
 - Service Desk KA’s, Ops Manual, Approved design / testing, go-live RFC
- Find the correct places to utilise. The first time is not the go / no go!
- Use as part of go / no-go e.g. evidence to assist pass through go-live gate

How to introduce quickly – Benefits

- It's a start!
- A move towards a structured, consistent approach to SD&T
- Can contribute to improvements in Project Delivery and BAU morale
- Can ensure the project maintain accountability for deliverables
- Doesn't require SD&T governance throughout deliveries

How to introduce quickly – Challenges

- May be seen as extra bureaucracy
- Not aligned to a project delivery framework; when will it be referenced throughout deliveries?
- When are gaps addressed? “We’re ready to go-live!”
- May set a poor precedent for further SD&T iterations

How to introduce longer term

- Know / revisit the why
- Create SD&T Guide / Terms of Reference
 - Align to overall IT Service Management strategy
 - Include SD&T vision, mission and roadmap
 - Finalise. Submit for peer review and manage feedback
- Ensure continued process buy in from Senior IT Management
- Create the team:
 - SD&T Process Owner / SD&T Process Manager
 - SD&T Analyst(s)
- Finalise stakeholder list and gauge influence

How to introduce longer term

- Meet stakeholders individually and arrange wider workshops.
Understand areas of pain, but also what already works well?
- Create “Toolkit”, a spreadsheet containing the standard list of AIS criteria, complete with guidance and suggested artefacts
 - Reference Technical and Service Management workstreams
 - Align to project delivery framework gates / terms (not embedded yet)
 - Peer review acceptance criteria with stakeholder shortlist
 - Toolkit created and owned by SD&T for each project delivery

How to introduce longer term

- Show where SD&T influence and deliver. It's not just all for projects to do!
- Work with PMO to identify pilot projects / willing Project Managers

How to introduce longer term - Key Artefacts

- Completed (as far as possible) Toolkit
- Approved high level / low level technical designs
- Approved Functional / Non-functional testing
- Approved build and go-live Request for Changes (RfC's)
- Approved 1st line operational documentation e.g. Knowledge Articles
- Approved 2nd and 3rd line operational documentation e.g. Runbook
- Approved Support Model / Service Design / Service Wrap
- Approved Early Life Support plan

How to introduce longer term – Benefits

- A structured, consistent approach to SD&T
- Earlier initial awareness of change for BAU Teams. Fewer surprises!
- Increased communication, collaboration and planning between Project and BAU throughout project deliveries
- Earlier, more accurate estimation of on-going support costs, BAU resourcing requirements and training
- Increased confidence of projects delivering to an agreed specification

How to introduce longer term – Benefits

- Earlier understanding of
 - Potential gaps in service
 - Ongoing risks to serviceand the opportunity to resolve, or agree mitigations plans and ongoing ownership
- Higher quality knowledge (what we know), data (the facts) and information (data put into context) about services, ensuring availability to the right people at the right time

How to introduce longer term - Challenges

- May be seen as extra bureaucracy, even though the majority should already be being delivered!
- Some deliveries may not go to plan, or in the correct order! Some go-live dates cannot be missed. ELS can protect the support organisation and acceptance criteria is perfect audit of outstanding activities.
- There may be a lot of in-flight projects. Stop starting and start stopping!
- Showing the value of SD&T. Where is it providing the *most* value?
- Is SD&T resource available to pilot projects? Who is funding this?

How to embed as a workstream

- Update SD&T Guide / Terms of Reference
 - Revisit vision, mission, strategy roadmap
- Work with PMO to integrate SD&T artefacts into PMO gate checklists
- Promote SD&T as the link between Project Delivery and BAU
- Create tagline - **“Early Engagement = Project Success!”**

How to embed as a workstream - Key Artefacts

- Completed (as far as possible) Toolkit
- Approved high level / low level technical designs
- Approved Functional / Non-functional testing
- Approved build and go-live Request for Changes (RFC's)
- Approved 1st line operational documentation e.g. Knowledge Articles
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How to embed as a workstream – Benefits

- Benefits continue to be realised from slides 14 and 15
- Now a mandatory IT process embedded within PMO
- SD&T documents standardised and version controlled via PMO
- SD&T resource added to future project proposals
 - This may resolve the funding challenge!

How to embed as a workstream – Challenges

- Same as slide 16!
- Is SD&T funding challenge now resolved i.e. by adding SD&T into future project proposals as a project expense?

How to improve

- Post Implementation Reviews
 - Analyse incidents / requests. Is there tangible service improvement?
Are the introduced / amended processes being followed?
- Host SD&T drop-in surgeries
 - Create online Q&A document from surgery output
- Submit questionnaire to Project Team members post project closure
- Capture ad-hoc, in-flight project feedback
- Create SD&T Key Element Guide as compliment to guide / ToR

Is SD&T agile?

- Yes!
- Project Delivery and BAU Teams who utilise sprints to prioritise and deliver work (AIS criteria) will probably manage this in JIRA.
- Acknowledge that this will require forward sprint planning.
- Ensure Toolkit (ref slide 11) is still maintained as the single version of the truth for overall SD&T progress.

Thank you



Appendix

Example Acceptance Criteria Themes

Start-up / Initiation	
Service Definition agreed	Business impact of outage understood
BAU training requirements agreed	End to end support process drafted
New / amended Service Requests understood	Release/Deployment process understood
Joiners / Movers / Leavers process referenced	Vendor support requirements agreed
Recurrent IT operational costs estimated	

Example Acceptance Criteria Themes

Delivery / Go-live & Handover	
Design approved before build	Capacity analysis
Backup and disaster recovery documented / tested	License and certificate requirements / management agreed
Maintenance windows agreed	Monitoring and reporting configured and tested
Third party contracts align with BAU support	Delivery added to Forward Schedule of Change
Knowledge Articles drafted / updated	Operational documentation drafted / updated
Functional / Non-functional testing approved	Recurrent IT operational costs finalised
Ongoing risks to service agreed and owned	Knowledge transfer agreed and final and approved
Support / Service Model approved	Early Life Support approach approved
Service go-live approved by BAU stakeholders	Development ID's removed from production environments
Service is agreed as stable before ELS closure	