

ITIL® – Why Should I Care? **Listen in on our Q&A**

If you haven't heard of ITIL®, you will. ITIL (the Information Technology Infrastructure Library) is a framework of good practice in IT Service Management. It has been widely embraced over the past couple of decades in Europe, and is now making significant inroads in the US and the rest of the world.

ITIL is one of the few widely accepted frameworks that directly address IT operational practices. Just as the PMBOK® (Project Management Body of Knowledge) has been widely accepted as a source of good practice for Project Management, and the CMMI® (Capability Maturity Model Integration) has been embraced as a source of good system engineering practice, ITIL is becoming the "go-to" source of good practices in IT operations.

You needn't look far to find articles and presentations that explain ITIL's Service Lifecycle Model, the Processes and Functions that comprise it and the ITIL certifications one can obtain. But all of those facts may leave you with many more questions. If you are like Cinda Voegtli, CEO and Founder of Project Connections, you may still be wondering what the point is.

Cinda and I engaged in a long-distance conversation about this. We invite you to listen in as she articulates her questions and I answer them on our way to answering the biggest question about ITIL, "Why should I care?"

Back and Forth

Cinda Voegtli: I have attended several presentations at PMI events on ITIL. They talk about what ITIL is, using high level descriptions of content, and rather general descriptions of benefits. They cover the framework and refer to all of the processes, but they don't tell me what I really want to know: Why should I care?! In all seriousness, from those ITIL presentations, I have not gotten a sense of what ITIL really looks like in practice, and the benefits expressed in a way that make me feel I need this process *now*.

Alan S Koch: There are a lot of reasons why people care about ITIL. Which one applies to you depends on which hat you are wearing when you ask the question.

If you are speaking as Cinda Voegtli, CEO of ProjectConnections, you will care about ITIL because ProjectConnections has a large IT operational investment. Some of those operations are managed by ProjectConnections personnel, and others are contracted from IT service providers. But either way, if they don't do what you need in a cost-effective way, you have problems.

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* "PMBOK" is a Registered Trademark of the Project Management Institute, Inc.

* "CMMI" is registered in the US Patent and Trademark Office.

Your objective is to run the company, and your internal and external IT service providers are partners in this endeavor. The success of ProjectConnections is dependent upon them and the maturity of their practices. ITIL defines all of the aspects of this partnership, providing a basis for capitalizing on those aspects that work well, and for addressing those aspects that are problematic.

Cinda Voegtli: How does ITIL help me in working with my outside partners? For example – does ITIL get specific about what exactly should be covered in a contract with a hosted web provider? Or about what should in general be included in a services vendor contract?

Alan S Koch: ITIL's Supplier Management process does not get into those types of specific technical topics. It is very similar to what the PMBOK and CMMI say on this topic. Where ITIL adds real value is in its approach to tying Supplier Management (what we expect of our suppliers) back to Service Level Management (what our customers expect of us) and ultimately back to our Service Strategy (what we expect of ourselves).

ITIL calls our agreements with suppliers "Underpinning Contracts". What do they underpin? They underpin our Service Level Agreements (SLAs) with our customers. Our ability to make specific commitments to our customers is enabled (underpinned) by the commitments we get from our suppliers. What must be included in our supplier contracts is not specified by ITIL; rather those things are naturally derived from the needs of our customers.

Cinda Voegtli: I see.

Alan S Koch: Then again, if you are speaking as Cinda Voegtli, Project Management devotee, you will be more interested in how ITIL defines the attributes of a mature context in which your project will thrive from the start.

Cinda Voegtli: For example ... ?

Alan S Koch: For example, you will appreciate how some of the ITIL practices establish a basis for IT projects by defining objectives, business requirements and success criteria *before* the project is even initiated.

Cinda Voegtli: How is ITIL's take on that different than just plain old defining requirements? What is it that is better, more IT specific, or otherwise unique, about this aspect?

Alan S Koch: ITIL's take on this is not different at all. Rather, this is one of the things I was referring to when I said that ITIL provides "a mature context". For most of us, a project begins with a problem or opportunity statement, and then we must expend a significant amount of effort doing requirements elicitation and developing a complete understanding of what is needed. (And we all know the statistics about how many projects are deemed to be challenged or failed due to requirements issues!)

In an ITIL environment, the need, objectives and requirements (both business and operational) are all researched and agreed to as a part of the Change Management process *before* a project is initiated. So instead of starting with a cocktail napkin-worth of "ideas", the project begins with a well-formed charter, as

well as a fully researched and vetted set of business and operational requirements that are ready to be translated into the solution requirements and product design.

Cinda Voegtli: OK, so PMBOK talks about project initiation process and charters, and BABOK covers requirements-related processes. How does the ITIL intersect with those? I have this picture in my head of 3 different standards trying to cover that one part of the project – which makes me dizzy. How do I as a Project Manager understand what is covered by each standard, choose between them, or determine that a project needs all three in some way? Are they compatible or conflicting? Are they at different levels of detail and therefore useful in different ways?

Alan S Koch: In reality, you should *not* “follow” *any* of the three! PMBOK is written from the Project Manager’s perspective. BABOK is from the Business Analyst’s perspective. And the part of ITIL that I was just discussing is from the Change Manager’s perspective. Are they compatible? I would go beyond “compatible” and say that they are complimentary, each with useful perspectives and practices.

The best usage of these three sets of good practice is for the Project Manager (with PMBOK in hand), the Business Analyst (with BABOK in hand) and the Change Manager and Service Level Manager (with ITIL in hand) to work out precisely how projects should be initiated in their specific organization. They will find no conflicts among them; only points at which they must agree that one person’s responsibility ends and another’s begins. The result will be a way of kicking off projects that is informed by three of the best sets of good practice to be found, but is designed for the specific needs of their own organization.

Cinda Voegtli: That’s a helpful way of depicting how any standard could be used effectively for a project – I get the image of the people in those 3 key roles each bringing their domain’s best practices to the table. How does this play out during the rest of a project?

Alan S Koch: Initiation is not the only part of the project that benefits from the ITIL processes. You will also appreciate how other ITIL practices address the delivery and hand-off aspects of your projects in a well-defined and systematic way.

Cinda Voegtli: My mind immediately goes to IT-specific challenges and complexities related to delivery and hand-off. Does ITIL go all the way to specifics for different types of IT projects, e.g. delivery and hand-off considerations for apps vs. infrastructure vs. business process improvement vs. web vs. ERP...?

Alan S Koch: It is not that ITIL provides specific guidance for every type of implementation you might be doing. Rather, the ITIL Release and Deployment process is structured to ensure that all of the right players are included, and all of the right questions are asked prior to actual rollout of the product.

For example, on an infrastructure rollout, deployment planning would include identifying how and when the deployment can be done without having a visible impact on the end users. And when that is not possible, it would include working with those users to identify the best (or least bad) time for the deployment-related service interruption.

In addition, the Release process includes ensuring that rollback plans are in place so that a failed deployment can be un-done quickly and effectively, minimizing the negative impact. And, it includes fully

testing both the release and deployment mechanisms (including data conversion) as well as rollback procedures to be sure they will work correctly.

And if I may throw one more item into the mix: ITIL's Knowledge Management process works with the Release and Deployment process to ensure that everyone has all of the information they need about whatever is being released. This goes all the way from operations personnel knowing how to run a new system, to end users getting the necessary training and support during transition, and the Service Desk having the data they need to fully support it on day one.

You will appreciate the benefits of managing projects in an ITIL-enabled environment where your projects will be part of a well-defined whole, rather than an oasis of good practices in a sea of chaos.

Cinda Voegtli: Say more – what do you specifically mean by the oasis vs. the sea around the oasis.

Alan S Koch: The image I have in mind comes from what I have repeatedly experienced. We institute sound project processes (ala PMBOK or CMMI or Agile) to bring order to our world of projects, only to find that the rest of the organization doesn't get it. And not only do they not understand, but they seem to be working at odds with our good practices, almost like they want to make us fail. We had hoped that good practices would solve our problems, but instead they highlighted other dysfunctions around us. Instead of living in a world of good practice, we are merely creating an oasis. The chaos around our projects persists.

ITIL extends sound practices to our entire IT organization and beyond, to our customers. And it is not just a matter of good IT Service Management processes coexisting with good Project Management processes. It is about uniting them into a single process framework that is coordinated and focused on meeting our customers' needs.

Cinda Voegtli: To clarify ITIL's boundaries – do you mean that it extends beyond the IT team itself? How?

Alan S Koch: In a sense it does. ITIL's Service Level Management (SLM) process defines how we can do effective Customer Relationship Management (CRM) with IT's customers – the users of the IT Services we provide. Where our customers have mature business processes and good understanding of their needs, SLM is focused on coordinating our processes with theirs so that IT services go beyond merely supporting them, to fully enabling and optimizing what our customers do.

Where chaos exists, SLM actively works with customers to help them to define their IT needs (Service Level Requirements) and define how their relationship with IT should work to best meet their business needs. This is not a one-time task – this relationship is maintained and reinforced over time, which results in a gradual quelling of the chaos.

The other way the ITIL reaches beyond IT is in ITIL's whole approach to IT Service Strategy. IT Service Strategy is not a matter of IT coming up with a strategy; rather, it is mainly about connecting and coordinating the strategic fabric of the organization into a unified whole. ITIL does not talk about IT strategy supporting corporate strategy. Rather, ITIL expects that corporate strategy covers all phases of the enterprise including IT.

And again, in an organization where corporate strategy is ill defined, ITIL will have a chaos-fighting effect. The IT executives will be asking questions that will generate healthy discussions of strategic issues which will (hopefully) result in corporate strategy slowly coming into better focus.

Cinda Voegtli: Taking on any new process is an investment of thought and time. I'm a huge believer in finding ways to start adopting high-leverage new techniques – pieces of process, if you will – to get going with new best practices. But even then I need to understand the big picture. The examples you've given of specific questions and practices ITIL calls for at different times in the project absolutely resonate and show me opportunities to leverage even just pieces of ITIL. But let me ask one final question to make sure I truly understand ITIL's "big picture".

I come originally from a high-tech product development background. So I know NPD (new product development) methodologies extremely well. I understand the phases and why the work is chunked that way. I understand who should be on the team from all the different functions (manufacturing, service, marketing, engineering, quality and testing, etc.), when they should be involved, how, and why. I know all the typical technical and cross-functional deliverables such as specs and plan. In all these areas I know from years of experience why those elements are there and why they contain what they do. For example, if we don't have manufacturing involved in reviews up front, the engineers could inadvertently design systems that are too complex or costly to manufacture – at the desired price point and profit margin.

We also need to involve a number of different groups, including outside development partners, in certain planning and review activities, or we'll risk misunderstandings and bad handoffs. An NPD process is a mix of technical and project management techniques, brought together in a framework that integrates a set of complex work, in a way that helps ensure the business benefits of the project are ultimately met. The process framework can be adjusted and adapted for different sizes and types of NPD projects.

Is this what ITIL is for IT environments and projects?

Alan S Koch: Precisely!

Closing note from Cinda. My thanks to Alan for engaging in the back and forth dialogue that resulted in this article. I had truly gotten frustrated with ITIL presentations that had left me with more questions than answers. No organization takes on a new process lightly, and I want to understand just what it means to me and my teams on the ground, what benefits I can expect specifically, and how it relates to all the other good-practice processes so many of us are already trying to utilize. Just this one conversation with Alan cleared much of my personal ITIL fog; hope you've found it useful as well.

If you have your own questions about ITIL – whether about the philosophy of it, details within it, or successfully implementing it, please feel free to post below or email them to me at cinda@projectconnections.com. And if you have your own perspectives to contribute, write away!