



ITIL Certification Course

ITIL v.3.0



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BUILDING SERVICE VALUE

Introduction

Service Transition guides a Service change along its journey from Design to Operations and Continuous Service Improvement.

It ensures that the change provides value to the business, that it integrates with existing services and control systems, that it provides the value the design promises, and that business and IT environments have the capabilities to employ it to their best benefit.



Professionally Speaking

“ Pulling everybody out of the weeds and looking at the overall picture is probably one of the hardest goals, with the highest payback, of Service Transition. Effective Service Transition, in essence, demonstrates that the whole is greater than the sum of its parts.

One of the most interesting things I witnessed in my time as a Change Manager at a nation-wide organization was how the various technical, business, and vendor teams began to synthesize knowledge and work as though they were of one mind. They literally developed a collective consciousness that allowed each team to think about the other teams' needs and address them. Practically speaking, this resulted in handling more change in less time with fewer resources. On an individual basis, team members moved from an “us vs. them” culture to an all-encompassing “we” culture.

Y2K was a time of intense preparation, but the effort did not stop there. There was still an enterprise-level Business to support, there were business-critical services in the development stage, there were newly-minted government regulations that demanded compliance. And, did I mention that the lease had expired on a Data Center and all of the equipment and network connections faced a cross-country move?

We did not know the term Service Transition at that time, and we developed our own processes and procedures. After the fact, we came to realize that they closely modeled the best practices documented in ITIL. Our successful processes matched ITIL; and our problem areas would have been less severe or more quickly resolved had we referenced the ITIL best practices.

I believe that the most important point of Service Transition is that it affects a wide range of stakeholders, each of whom owns a very important role in the successful transition of a new or changed service. Some roles are more directly involved than others, and some roles are on the critical path. Planning for a transition has to touch all roles, and the more each role understands its part in the overall transition, the more successful, and less resource-intensive, the transition will be.

”

Janet Roberts Kuhn, Vice President - itSM Solutions LLC

Terms to Know

Build -- The activity of assembling a number of Configuration Items to create part of an IT service. It may also refer to a Release.

Change -- The addition, modification or removal of anything that could have an effect on IT services; scope should include all IT services, Configuration Items, processes, documentation, etc.

Configuration Item (CI) -- Any component that needs to be managed in order to deliver an IT service.

Configuration Management System (CMS) -- A set of tools and databases that are used to manage an IT Service Provider's configuration data.

Definitive Media Library -- One or more locations in which the definitive and approved versions of all software Configuration Items are securely stored.

Release -- A collection of hardware, software, documentation, process or other components required to implement one or more approved Changes to IT services.

Release Unit -- Components of an IT service that are normally released together.

Service Knowledge Management System (SKMS) -- A set of tools and databases that are used to manage knowledge and information which includes the Configuration Management System.

Transition -- A change in state, corresponding to a movement of an IT service or other Configuration Item from one Lifecycle status to the next.

Validation -- An activity that ensures a new or changed IT service, process, plan or other deliverable meets the needs of the business.

Questions to Answer

1. Why is the "Service V Model" an important concept within Service Transition?
2. How does Service Transition bridge Service Design and Service Operation?
3. What value does Service Transition bring to the business?
4. What is the relationship between the Configuration Management System and the Service Knowledge Management System?
5. What are the "Seven Rs" of Change Management?
6. What role does technology play in Service Transition?
7. How do Service Management, Design and Improvement relate?

Service Transition & The Service Lifecycle



ST & The Service Lifecycle

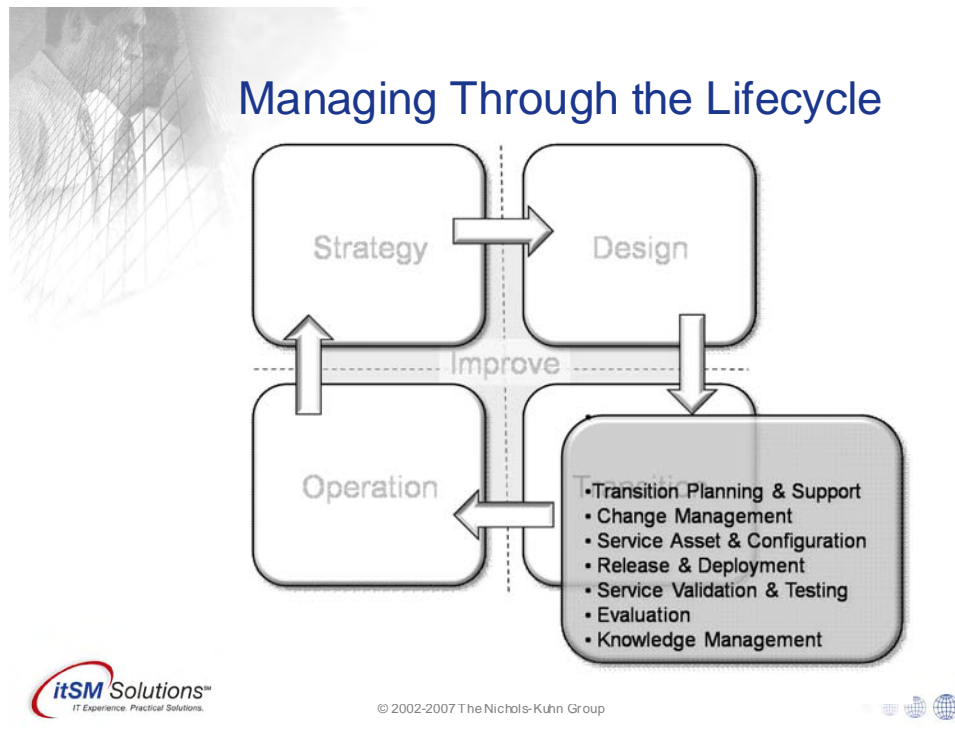
- Service Strategy
 - Design, Development & Implementation
- Service Design
 - Design & Development
- Service Transition (ST)
 - Development & Improvement
- Service Operation
 - Delivery & Support
- Continual Service Improvement
 - Create & Maintain Value



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Service Transition is where Service Design transitions into Service Operations. It provides the mechanisms to move a new service into the production environment, nurture the service during its fledgling days, and validate the quality and business value of the change.

Managing Through the Lifecycle




Service Transition assists organizations seeking to plan and manage service changes and deploy service releases into the production environment successfully.

Service Transition - Purpose, Goals & Objectives




Service Transition - Purpose, Goals & Objectives

- Manage Resources Required for the Transition Services into Operation
 - Optimize Business Benefit
 - Manage Risk
- Manage the Integration of Business & Infrastructure Change
 - Meet Business Requirements
 - Manage Expectations
 - Reduce Variability
- Plan & Manage the Transition of Services
 - Apply Necessary Rigor
 - Provide Quality Knowledge & Information
 - Minimize Risk

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Service Transition serves as the conduit through which the outputs of Service Design move into the real-life world of production and Service Operation. While guiding a change in a service through a step-by-step implementation, Service Transition additionally addresses the context in which the change is made, ensuring that the users are motivated to use the new service, IT knows how to support it, and the business will be able to evaluate its promise to create value for the business.

Service Transition - The Scope



Service Transition - The Scope

- Manage & Coordinate
 - Processes
 - Functions
 - Systems
 - As Related to:
 - Packaging
 - Building
 - Testing
 - Releasing
 - Deploying ... **IT Services**
- Service Operation & Continual Service Improvement
 - Modifications of Existing Services



Service Transition is involved in two aspects of the Service Lifecycle. It provides the necessary framework to transition new services into operation as well as the modification of existing services to effect corrections or improvements.



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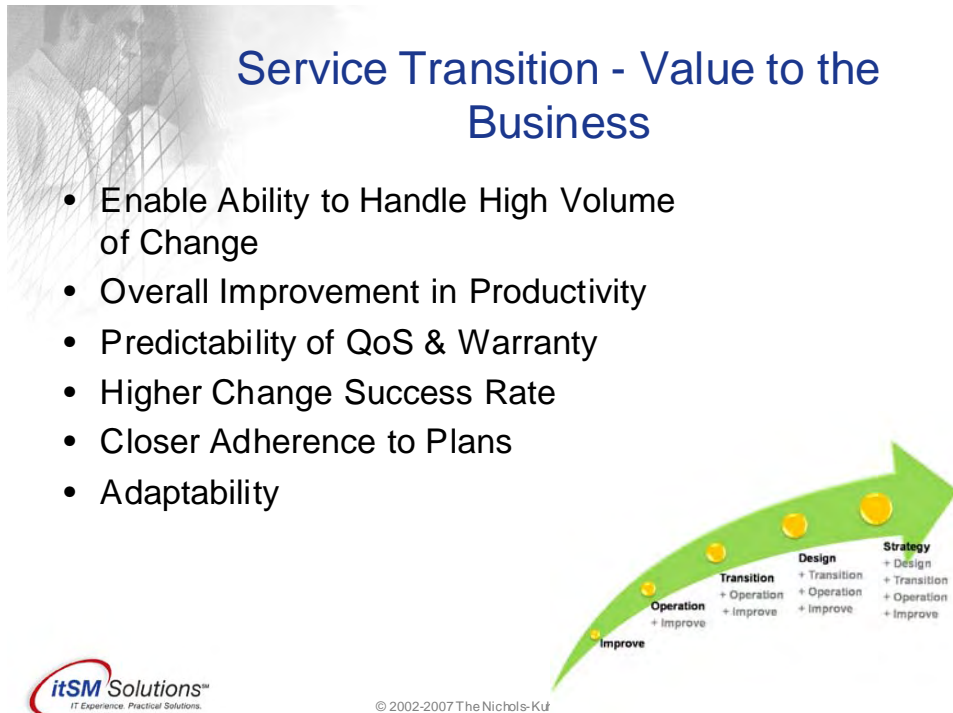


Service Transition encompasses all ITIL processes, as it is responsible for transitioning these processes, either as part of a new or changed service, or as part of building changes to the Service Management processes themselves.

Its internal processes of Change Management, Service Asset and Configuration Management, and Knowledge Management support transitions initiated within any of the lifecycle stages.

Service Transition addresses all of the types of changes and transitions that an IT service faces, including introducing new services, changing existing services, discontinuing services, changing suppliers, changing from in-sourced services to out-sourced services or the other way, down- and up-sizing, mergers and acquisitions, and so forth.


Service Transition - Value to the Business



Service Transition - Value to the Business

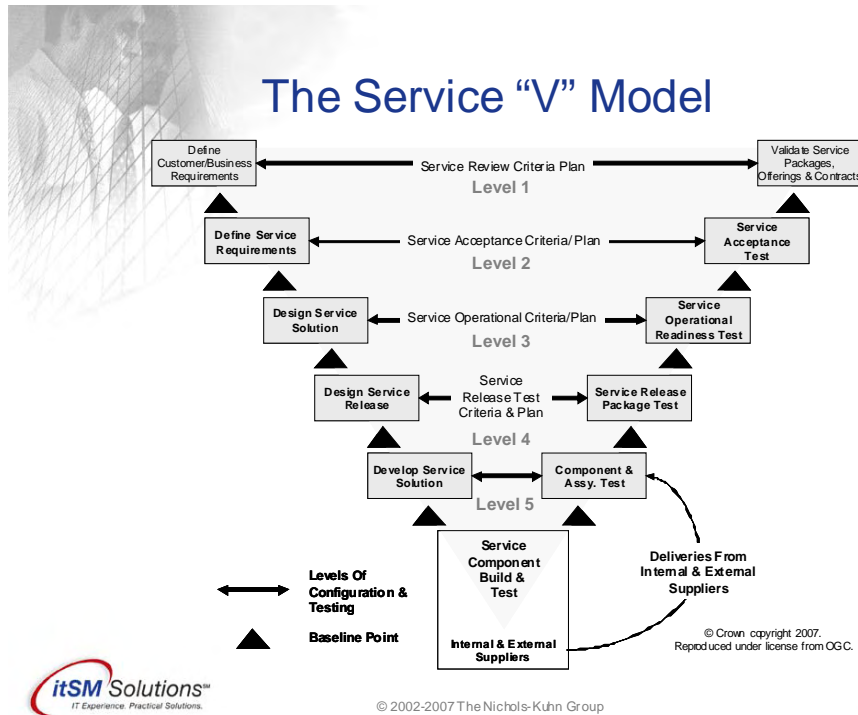
- Enable Ability to Handle High Volume of Change
- Overall Improvement in Productivity
- Predictability of QoS & Warranty
- Higher Change Success Rate
- Closer Adherence to Plans
- Adaptability

Improve
 Operation + Improve
 Transition + Operation + Improve
 Design + Transition + Operation + Improve
 Strategy + Design + Transition + Operation + Improve


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The successful deployment of Service Transition processes improve the service provider's ability to handle high volumes of change and releases across the customer base. This in turn enables the service provider to align new or changed service with business requirements and operations and ensure that customers and users can use the new or changed service in a way that maximizes value to the business operations.

The Service “V” Model



Starting with broad-based requirements and service offerings, the V Model uses regression testing to converge into a fully-tested and validated release that is fit for both purpose and use. The V Model is a powerful model whose left side focuses on specifications for the service, and the right side represents the validation activities performed against the left side.

LEVEL 1 CUSTOMER/BUSINESS NEEDS. Determines where a service can enable the users and customers to use the service to support their business needs.

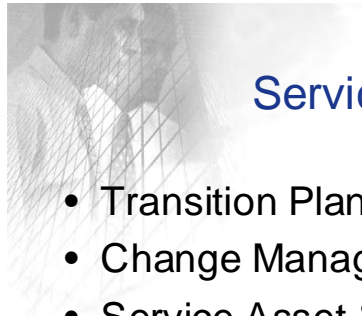
LEVEL 2 SERVICE REQUIREMENTS. Tests that the Service Acceptance Criteria (SAC) are met; validates service performance against Service Level Requirements.

LEVEL 3 SERVICE SOLUTION. Verifies that the target deployment organization and people are prepared to deploy and operate the new or changed service in the live environment.

LEVEL 4 SERVICE RELEASE. Tests that service components can be integrated correctly and that the release can be installed, built and tested in the target environments.

LEVEL 5 COMPONENT AND ASSEMBLIES. Tests that a service component or assembly of components matches its detailed specification.

Service Transition - Processes



Service Transition - Processes

- Transition Planning & Support
- Change Management
- Service Asset & Configuration Management
- Release & Deployment
- Service Validation & Testing
- Evaluation
- Knowledge Management



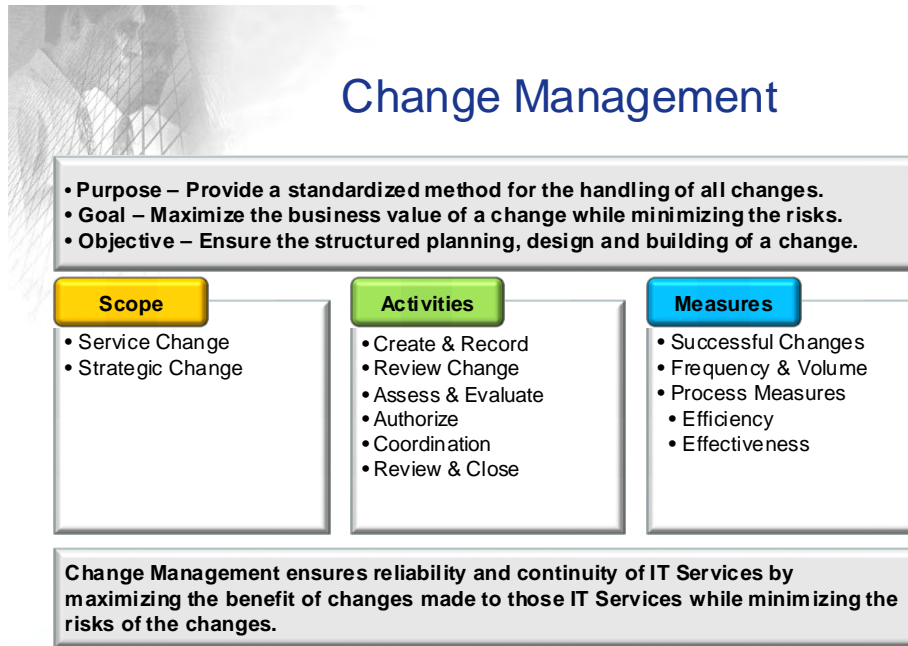
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The seven Service Transition processes will be examined in the following sections.

- Transition Planning & Support - Plans and coordinates the resources to move a new or changed service into production within the predicted cost, quality and time estimates.
- Change Management - Responds to the customer's changing business requirements while maximizing value and reducing incidents, disruption and re-work. Service Asset & Configuration Management
- Service Asset & Configuration Management - Identifies, controls, records, reports, audits and verifies service assets and configuration items and protects the integrity of the assets and configurations required to control the services and IT infrastructure.
- Release & Deployment - Provides processes, systems and functions to package, build, test and deploy a release into production and to establish the service specified in the Service Design package.
- Service Validation & Testing - Validates and tests to provide objective evidence that the new or changed service will support the customer's business and stakeholder requirements.
- Evaluation - Determines the performance of a service change in the context of existing and proposed services and IT infrastructure.
- Knowledge Management - Delivers the right information to the appropriate place or competent person at the right time to enable informed decisions.

Change Management



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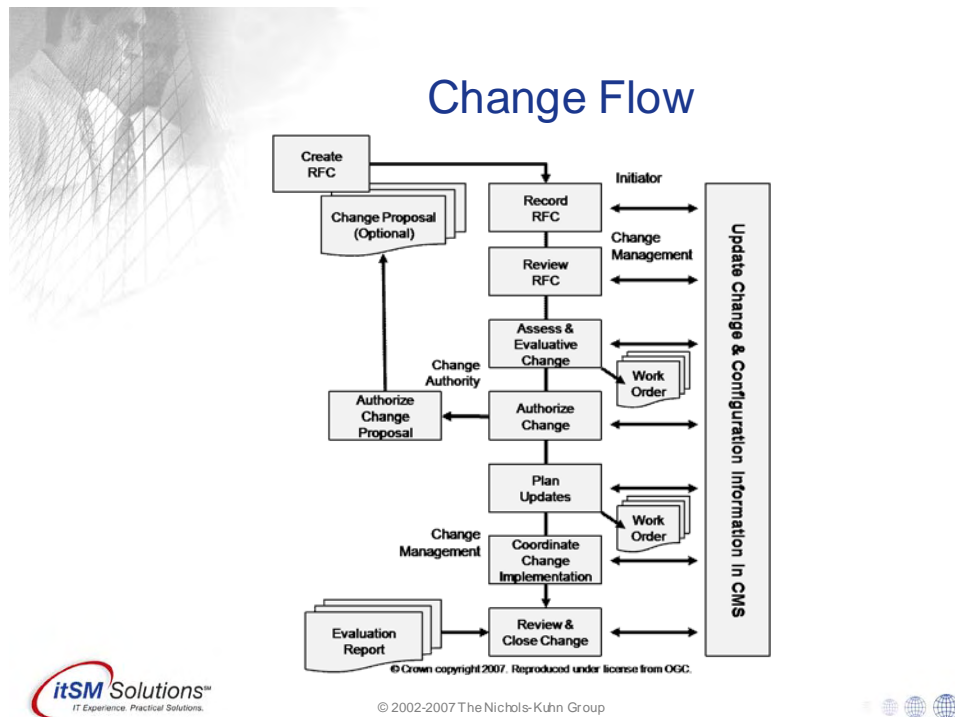
Some years ago the Gartner Group published a report stating that 87% of the calls into a typical company's Service Desk were the result of change-related failures. The Help Desk Institute determined that the support industry standard cost per contact is between \$15 and \$30. If a support organization averages 1500 service requests a month, using Gartner's 87% figure and \$25 per contact, the cost of change-related failure requests is an astounding \$391,500 annually. Therefore, it should come as no surprise to anyone that the successful implementation of the Change Management process should lead to significant improvements in the overall stability and quality of IT services.

The implementation of the Change Management process represents a major milestone for the IT organization on the road to stabilizing its IT infrastructure. It is probably the most difficult process to get firmly established because it requires the support of everyone involved in IT provisioning and support.

The Change Management process does not guarantee that Changes to the IT infrastructure will not induce Problems. However, the objective of Change Management is to maximize the benefits of Changes to the business, while at the same time minimizing the risks.

Using Change Management whenever the Change is something that IT does not do frequently or is something with which IT may not have experience can deliver the extra control required for success. Normally, IT uses Change Management when a Configuration Item (CI) is going to change in some substantial way. Change Management also ensures that Changes like relocating a printer from the second to third floor receive authorization.

Change Management Flow



The Change Management workflow delivers quality change by following a controlled sequence of activities, similar to the steps shown above.

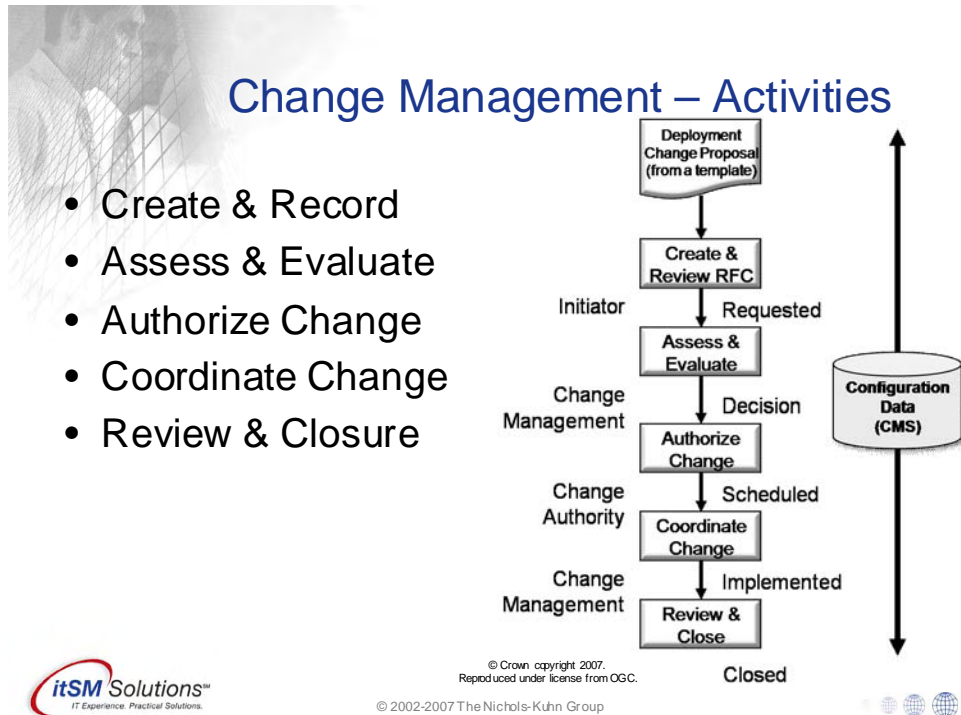
The basic workflow never varies, despite the type of change taking place.

NORMAL CHANGE. The normal change sets the standard for all types of change within the organization. The major difference between the Normal change procedure and the Standard Change and Emergency Change procedures is that the Normal Change procedure can be modified, but the other two procedures are very well structured to enable them to formulate changes with minimal bureaucracy or time.

STANDARD CHANGE. Standard changes are pre-authorized changes. Typically they consist of well-known, well-documented and low-risk tasks for which authority has been given in advance and budgetary approval is already set or is controlled by the requester. An example is installing workstation software from an approved list.

EMERGENCY CHANGE. Emergency changes address situations that have a high negative impact on the business. In general, it should be possible to handle even urgent changes as Normal Changes by moving up their priority. In an emergency it may not be possible to convene the full Change Advisory Board (CAB), so there should be an Emergency CAB (ECAB) with pre-defined authorization levels to deal with emergencies. Careful consideration should be given to the amount of testing that can be performed during an emergency change, bearing in mind that a failed change is usually costlier than the time it would take to do thorough testing.

Change Management - Activities



The five general Change Management activities will be examined in the following sections.

CREATE & RECORD. The initiator creates a Request for Change (RFC), and the Change Management process records and logs the document.

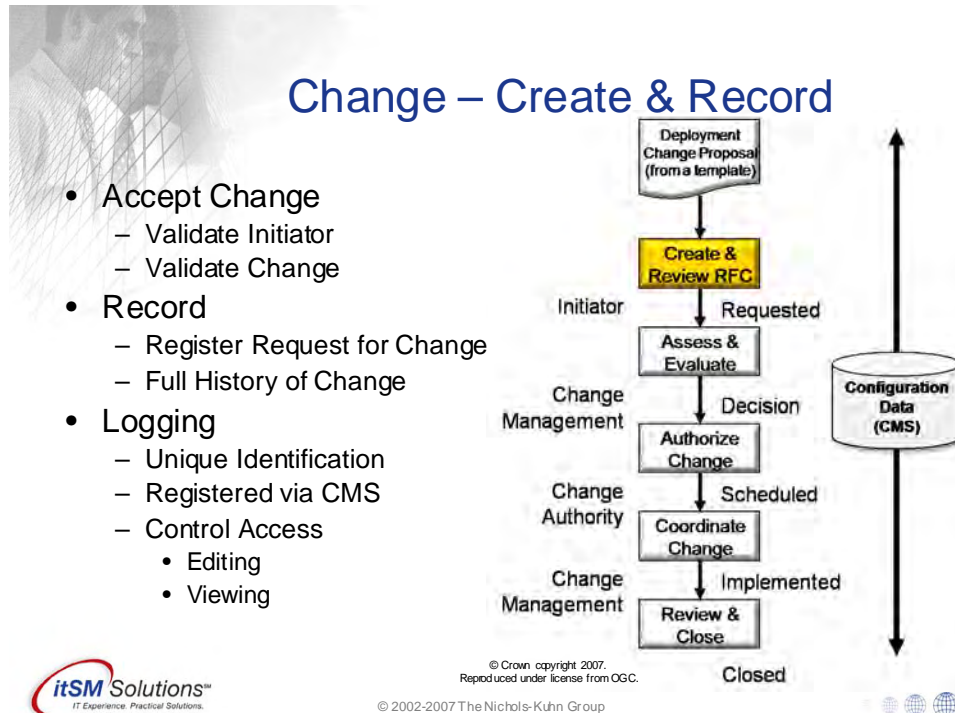
ASSESS & EVALUATE. The Change Advisory Board (CAB) reviews the RFC, assesses its impact on services and its relevant risks, and evaluates its approval.

AUTHORIZE CHANGE. Depending on pre-defined levels of responsibility, the RFC receives authorization to proceed.

COORDINATE CHANGE. Change Management assumes oversight role to coordinate change building by the relevant technical groups.

REVIEW & CLOSURE. The Change undergoes a formal review and closure process upon completion to confirm it has met its objectives and did not introduce any unwanted side-effects.

Change - Create & Record



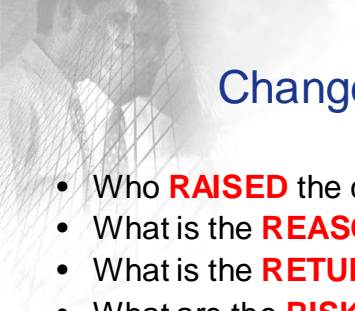
ACCEPT CHANGE. A Request for Change can come from many different areas. The acceptance task reviews the request to validate that the initiator is authorized to request a change. It also validates the request to determine whether it duplicates a previously submitted request or has properly followed the request procedure. It may, if necessary, filter out requests that appear to be totally impractical.

Rejected requests should be returned to the initiator, with details about why they were rejected

RECORDING. The change record should hold the full history of the change, including priority and authorization, implementation and review information. Whenever possible, contents should be standardized, and the documentation of the change should be defined during the Transition process design and planning stage.


LOGGING. Typically, organizations log all RFCs and assign them a chronological identification number. They should also include the reference number of any associated Incident or Problem records. Preferably the organization uses an integrated Service Management tool to log the RFCs, and store data on all assets and CIs, and their relationships.

Change Management - The 7 R's




Change Management – The 7 Rs

- Who **RAISED** the change?
- What is the **REASON** for the change?
- What is the **RETURN** required from the change?
- What are the **RISKS** involved with the change?
- What **RESOURCES** are required to deliver the change?
- Who is **RESPONSIBLE** for the build, test & implementation of the change?
- What is the **RELATIONSHIP** between this change and other changes?

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This mnemonic provides a sound framework for assessing and approving a change.


By fully answering these questions the Change process will be able to assemble a change that delivers the expected business benefits while not detrimentally impacting the live service.

Change - The Change Advisory Board (CAB)



Change – The Change Advisory Board (CAB)

- Customer Representation
 - Initiator
 - Business Process Owner
 - Users & Management
- Process Representation
 - Process Owners
 - Process Managers
 - Process Staff Members
- Technical Representation
 - Managers
 - Subject Matter Experts
 - Vendors/Consultants



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CHANGE ADVISORY BOARD. The Change Manager chairs the Change Advisory Board (CAB) and Emergency Change Advisory Board (ECAB) meetings. The CAB is both an authoritative and representative group of people responsible for assessing, from both a business and a technical viewpoint, all significant (high-impact, high-risk) RFCs.

The CAB consists of Customer, User and IT representatives and may include, depending upon the nature of the Changes under consideration, third-party, vendor, and administrative business representatives. CAB membership may vary due to the RFC at hand. The CAB advises Change Management on the priorities of RFCs and proposes allocations of resources to implement those Changes.

EMERGENCY CHANGE ADVISORY BOARD. The Emergency Change Advisory Board (ECAB) is a subset of the CAB that considers an RFC tagged as an Emergency Change.

Appropriate whenever the business impact justifies it, an Emergency Change is: A Change that must be introduced as soon as possible to alleviate or avoid detrimental impact on the business.

Change Management - Challenges



Change Management – Challenges

- Major IT Cultural Shift
 - Perceived as Bureaucratic
 - Siloed Technical Functional Areas
 - Organizational Behavioral Change
- Establishment of the “New Normal”
 - Attempts to Bypass
 - Changes Only Made via Change Management
- Vendor/Contractor Compliance



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Implementing the Change Management process will normally mean a significant cultural shift within the IT organization and to some extent the User community.

Many view the Change Management process as bureaucratic, and that the IT staff has too much “real work” to do to follow the process. The truth of the matter, if the Gartner report is correct, is that the “real work” being done is the result of failed Changes.


Patience and unflagging management commitment, along with constant training, will eventually win over the IT staff and the users.

“Real work” is also an excuse to bypass the Change Management process, a practice that can provide additional opportunities to do even more “real work.”

When implementing a Change Management process, the IT organization must involve its vendors in planning the process and ensure their total cooperation. Keeping their commitment will require continual refresher training of vendor personnel and the support management team.


When a service has no central control or responsible party, it becomes difficult to make decisions regarding a Change that affects it.

Service Transition - Roles




Service Transition – Roles

- Service Transition Management
- Planning & Support
- SACM Management
- Change Management
- Performance & Risk Management
- Service Knowledge Management
- Service Test Management
- Release & Deployment Management
- Release Packaging & Build
- Deployment
- Early Life Support
- Build & Test Environment Management



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Depending on the organization's size and the service being transitioned, some of these roles will be combined and performed by one individual, or shared with other processes within the Service Management lifecycle.

SERVICE TRANSITION MANAGEMENT. Provides daily management of Service Transition.

PLANNING & SUPPORT. Provides support for the Service Transition teams and people.

SERVICE ASSET & CONFIGURATION (SACM) MANAGEMENT. Designs baselines appropriate for the service and identifying the relevant assets and CIs.

CHANGE MANAGEMENT. Manages the Change Management process and chairs the CAB.

PERFORMANCE & RISK MANAGEMENT. Establishes risks and issues associated with all aspects of Service Transition and develops evaluation plan as input to service testing.

SERVICE KNOWLEDGE MANAGEMENT. Maintains the Knowledge Management process.

SERVICE TEST MANAGEMENT. Supports testing and test team functions.

RELEASE & DEPLOYMENT MANAGEMENT. Manages complete end-to-end release process.

RELEASE PACKAGING & BUILD. Establishes the flow of work to deliver applications and infrastructure as per Service Design requirements.

DEPLOYMENT. Coordinates deployments with Change, Knowledge Management & SACM

EARLY LIFE SUPPORT. Provides support from prior to final acceptance by Service Operation, transitions service to Service Operation and Continual Service Improvement (CSI).

BUILD & TEST ENVIRONMENT MANAGEMENT. Ensures all relevant people have appropriate environment, test data, software, etc. when they need it.

Technology & Architecture



Technology & Architecture

- Knowledge Management
 - Documents
 - Records
 - Content
- Collaboration
 - Calendars & Tasks
 - Discussions
 - Messaging
 - Video/Teleconferencing
 - Communities of Interest
 - Workflow Management
- Configuration Management System



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Service Transition uses technology to support its own systems and processes, as well as to support a specific Service Transition.

Knowledge Management (KM) tools address the requirements of maintaining records and documents, usually electronically. KM considers documents to be evidence of intentions, such as policy statements, plans and contracts, and records to be evidence that an activity has occurred, such as signed acceptance tests. Content management is the capability to store, maintain and retrieve this information from a system.

Many collaboration tools are available. They can streamline and improve the way people collaborate on shared activities. Especially in the modern distributed environment, this capability leads to far better and quicker decisions and work.

An automated Configuration Management System (CMS) offers many benefits to Service Transition. One of its prime benefits is its capability to prevent changes from being made to the IT infrastructure or service configuration baseline without valid authorization.

Technology can also support the activities of Service Transition with measurement and reporting systems and Release and Deployment software.

Checkpoint - Service Transition

QUIZ

Service Transition Checkpoint

Much as mileposts guide drivers along highways, the following Checkpoint guides the student in distinguishing the learning objectives that he or she understands from those yet to be internalized.

The checkpoint is in the familiar multiple-choice quiz format. There is only one right answer to each question, and it helps to instill the terminology and comprehension of the subject area.

Understanding ITIL Terms

1. Components of an IT Service that are normally released together are known as a _____.
2. A Configuration Item is any component that needs to be _____ in order to deliver an IT Service.
3. Often used interchangeably with Release, a _____ is the activity of assembling a number of Configuration Items to create part of an IT Service.
4. _____ is an activity that ensures a new or changed IT Service, process, plan or other deliverable meets the needs of the business.
5. A set of tools and databases that manage an IT Service Provider's configuration data is known as a _____.
6. The definitive and approved versions of all software Configuration Items are securely stored in the _____, which may exist in one or more locations.
7. When the state of an IT Service or other Configuration Item changes from one IT Service Lifecycle status to the next it is said that the a _____ has occurred.
8. The Service Knowledge Management System (SKMS) is a set of tools and databases that manage knowledge and _____, which includes the _____.
9. The addition, modification or removal of anything that could have an effect on IT Services, Configuration Items, process, documentation, etc. is referred to as a _____.
10. The 7 Rs of Change Management include who _____ the change and what _____ are involved.

Quiz

1. Which represents the five levels of the Service “V” Model?

- a. Service Strategy, Service Design, Service Transition, Service Operation, Continual Service Improvement.
- b. Transition Planning & Support, Change Management, Service Asset & Configuration Management, Release & Deployment, Service Validation & Testing.
- c. Customer/Business Needs, Service Requirements, Service Solution, Service Release, Component & Assemblies.
- d. Service Quality Policy, Risk Policy, Service Transition Policy, Release Policy, Change Management Policy.

2. What is the correct sequence within Knowledge Management for building knowledge that can guide organizational judgment and decisions?

- a. Information, Data, Knowledge, Wisdom.
- b. Data, Information, Knowledge, Wisdom.
- c. Data, Knowledge, Information, Wisdom.
- d. Data, Information, Wisdom, Knowledge.

3. Which is the best objective of the Service Asset & Configuration Management process?

- a. Establishes control over the physical IT infrastructure.
- b. Ensures the structured release and deployment of IT Services.
- c. Provides for the structured validation & testing of IT Services.
- d. Plans for the required resources to package, build, release & deploy.

4. A Release Unit may best be described as which of the following?

- a. The secure library that stores and protects definitive authorized versions of media CIs, licenses and definitive software.
- b. A known, agreed configuration of the IT infrastructure.
- c. The ability or capacity of a service to absorb the service change or release.
- d. The portions of a service or IT infrastructure that are normally released together.

Glossary

- ACCEPTANCE** Formal agreement that an IT Service, Process, Plan, or other Deliverable is complete, accurate, Reliable and meets its specified Requirements. Acceptance is usually preceded by Evaluation or Testing and is often required before proceeding to the next stage of a Project or Process. See Service Acceptance Criteria.
- ACCESS MANAGEMENT** (Service Operation) The Process responsible for allowing Users to make use of IT Services, data, or other Assets. Access Management helps to protect the Confidentiality, Integrity and Availability of Assets by ensuring that only authorized Users are able to access or modify the Assets. Access Management is sometimes referred to as Rights Management or Identity Management.
- ACCOUNT MANAGER** (Service Strategy) A Role that is very similar to Business Relationship Manager, but includes more commercial aspects. Most commonly used when dealing with External Customers.
- ACCOUNTING** (Service Strategy) The Process responsible for identifying actual Costs of delivering IT Services, comparing these with budgeted costs, and managing variance from the Budget.
- ACCREDITED** Officially authorized to carry out a Role. For example, an Accredited body may be authorized to provide training or to conduct Audits.
- ACTIVE MONITORING** (Service Operation) Monitoring of a Configuration Item or an IT Service that uses automated regular checks to discover the current status. See Passive Monitoring.
- ACTIVITY** A set of actions designed to achieve a particular result. Activities are usually defined as part of Processes or Plans, and are documented in Procedures.
- AGREEMENT** A Document that describes a formal understanding between two or more parties. An Agreement is not legally binding unless it forms part of a Contract, *See also* Service Level Agreement, Operational Level Agreement.
- ALERT** (Service Operation) A warning that a threshold has been reached, something has changed, or a Failure has occurred. Alerts are often created and managed