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HOW TO SELL ITIL TO THE TOP   VOL. 2.7, FEB. 15, 2006

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By Hank Marquis
The *IT Infrastructure Library* (ITIL®) is an IT-thing. Yes, I know it benefits the business, but ITIL is inherently a set of IT workflow processes. Non-IT people, even well educated non-IT people (read senior executives with control over the purse strings) often don't understand what ITIL represents.

If you don't believe me the next time you bump into the CFO in the elevator try relaying the benefits of your recent *Component Failure Impact Assessment* (CFIA) exercise!

We also know that implementing ITIL incurs costs. True, there are many things you can do that are low or no cost, but some elements require investments. The question often arises about how to engage the "C-level" to get the mindshare necessary for budget allocations, people, products, etc.

As luck would have it, the ITIL has some guidance in this area. If you investigate the ITIL, you can uncover some real gems about how to engage the business and gain mindshare to fund our (IT) projects and plans. Following is a starter on how to engage the "C-level" and start selling ITIL to the top.

Understand the ITIL is an IT Matter
Yes, IT must align with the Business in order to deliver services required by Customer and Users. However, business strategic, commercial, and political matters are indirect components of an ITIL implementation. The Business will not drive ITIL adoption, only IT can drive ITIL adoption. It is incumbent upon us within IT to communicate, convince, and justify our plans.

Sometimes in our drive to align with the Business we forget that ITIL is an IT matter. While understanding that ITIL *can* benefit Customers and Users, it is also very important to realize and accept that ITIL is an IT matter first and foremost. We have to take responsibility for clearly communicating our needs to management, we cannot sit back and wait for enlightened management to grant us what we wish. ITIL adoption is an IT matter.

Learning to Sell
For many years, all IT had to do was state the requirements, and the business paid the bill -- or else! That is an odd arrangement considering that every other department has to justify its position, projects and existence. For example, no marketing department worth their salt introduces a new product and commits the company to a product development cycle without doing market analysis, understanding the profit potential, describing the costs, and adapting to market needs. They develop a written product plan. Then they present the need for the new product in business terms, that business stakeholders understand.

IT has forgotten this, and the only way to succeed in selling ITIL to the top is to learn how to sell! ITIL is a process for improving the performance of IT staff, services, and operations. IT improvement causes higher IT performance, which may or may not improve business performance. This indirect Business/IT linkage is where the breakdown almost always occurs. So, how do we map the IT-centric benefits of ITIL to sell to the business?

Stakeholders are the Key

Stakeholders are the Key

The ITIL describes the concept of stakeholders and the *Continuous Service Improvement Program* (CSIP). Many of us use the term CSIP very lightly, but if you examine it closely, the ITIL spends a significant amount of print on describing stakeholders.

A stakeholder is any individual or group with an interest or "stake" in IT or the CSIP. We usually know the stakeholders in IT, but have you ever documented the stakeholders outside of IT? For example, senior business executives, customers, users, etc? Now, have you considered stakeholders outside of the company? For example, vendors, suppliers, and competitors? Most of us probably think only of stakeholders with a positive impact within IT. In reality however, you must also include all stakeholders, inside and outside of IT and the company, and with a positive or negative impact.

It is here, in truly understanding (and documenting) your stakeholders that you find the keys to selling ITIL to the top! You will probably find that the most powerful allies for justifying ITIL are not inside IT, or even your company; nor will their impact always be positive.

In Table 1, for example, the CEO must comply with Sarbanes-Oxley; the Controller/CFO must work with auditors; the VP of IT must align IT operations to align. You must drive this from the top to the bottom. Start with the highest level possible, and expand downward, trying to map relationships. Note that you may need to have several maps!

Business/Mission Driver	Title	Name	AD	S	A	T	Audit/Control means
Shareholder value	CEO	D. Nichols	X				Sarbanes-Oxley via SAS-70
IT record keeping	Controller/ CFO	J. Kuhn		X			COBIT to align with SAS-70
IT record maintenance	VP IT	H. Marquis			X	X	ITIL best practice driven by COBIT CSF/KPI
Updated Incident Management Software	Service Desk Manager	T. Lyons				X	Reports and audits, based on ITIL, as defined by business requirements.
etc.							

Table 1. Example Stakeholder Mapping Table

Table 1 derives from the ITIL, but contains modifications appropriate for initial stakeholder definition. Specifically, I have added an Audit/Control means field, which clearly references the framework for understanding motivation. You can use this process for any IT initiative you wish to justify. Remember, it is our responsibility to justify what we know we need. Failure to observe this simple fact results in decreasing headcount and budget in the face of increasing requirements.

As a starting point toward taking the responsibility for selling ITIL to the top, here is a 7-point plan you can begin implementing today, for next to no cost:

1. **Identify Your Unique Business or Mission Drivers.** By yourself, or with a small group, list out the business drivers of your organization, not IT drivers like technology, but rather the reason for the existence of the entire organization. Start at the top level, and try to get to the significant aspects such as meeting shareholder needs for a public company, fulfilling voter needs for a municipality or readiness for a military organization. Remember to include internal/external, and positive/negative factors that affect your organization. For example, competitors clearly affect many companies selling products. Also, note that competition is not always a bad thing! Create a chart or table with eight (8) columns. List the business driver in column one (1), putting one per row. Note that various stakeholders have different reasons for doing things, and that each level of management probably has different drivers.

2. **Determine Ownership.** Once you know your business drivers, try to assign the title or role of the highest-level person responsible for each business driver. For example, if a business driver is meeting shareholder expectations, then the CEO is clearly responsible and "owns" that business driver. List the title or role of owner of the business driver in column two (2). Now, list the name of the owner in column three (3). You are now well on your way to identifying your true stakeholders!

3. **Identify Audit and Control Requirements.** Once you have listed several of the top business drivers and their owners, investigate how your company measures attainment of the business driver. Each industry has its own business or mission drivers, for example regulatory compliance (e.g., HIPPA, GLBA

industry has its own business or mission drivers, for example regulatory compliance (e.g., HIPPA, GLBA, FFIEC, etc.) and auditing (SAS-70, Sarbanes-Oxley, etc.) List the audit and/or control requirement in the last column (8). Your matrix now represents an overview of the things that are critical to your business or mission (drivers), who owns responsibility for each driver, and how that person or group will measure achievement. For example, if you work in a municipal IT department driven by officials elected based on a campaign to improve 911 services, you now know what motivates this stakeholder: delivering on their promise; and you now know how they measure achievement: election or re-election. This then, is what this stakeholder cares about. You must present anything you care about in terms that relate it to what they care about! Remember the classic marketing proverb "*don't tell me about your grass seed, tell me about my lawn!*"

4. **Identify Stakeholder Relationships.** With the stakeholders now identified, try to group them into "camps" of related interested. Your goal is to identify the relationships between stakeholders so you can locate key roles and persons. ITIL describes several roles including Change Advocate, Change Sponsor, Initiating Sponsor, Sustaining Sponsor, Agent, Target, Initiating Advocate, and Sustaining Advocate. The use of the word "Change" in this context does not represent a Request for Change (RFC), but rather the change in thinking or activity required for the IT department (us) to motivate them. Label columns 4, 5, 6 and 7 as AD, S, A, and T respectively. Now update your matrix with the correct marker for every role, title and business or mission driver listed below as shown in Table 1. For our purposes, try to imagine all those people or groups that can advocate a change; but remember that advocates do not always support your position! In other words, everyone involved, from staff, to executive to competitors has and advocates their own agenda. We will focus for now on just four roles:

   - Change Advocate (AD) -- persons owning the business/mission driver and actively supports the change
   - Change Sponsor (S) -- persons sponsoring the change
   - Change Agent (A) -- persons leading the change
   - Change Recipient (T) -- persons affected by the change

5. **Create a Stakeholder Map.** Once you know what motivates your company, organization, or business, who is responsible, and how they measure their success, you are prepared to begin selling the value of ITIL to the top! Using paper, office drawing software or a whiteboard, draw an "organizational" chart of the stakeholders with their actual relationships. Disregard physical reporting roles and hierarchy. Use AD, S, A and T to show stakeholder relationships. Then focus on capturing the dynamics of your stakeholders. For example, a Director may have several reporting managers on a traditional organizational chart; however, the views of his or her executive assistant (a key influencer) may carry more weight! You must understand the true dynamics of the organization in order to sell ITIL to the top.

6. **Translate.** The final step is to translate ITIL activities into business terms. This is the hardest part, but it is easier with a stakeholder map and your table of drivers, responsibilities and roles. For example, let us say you need to convince the CFO that purchasing some expanded Incident Management software is required. You could approach it as most IT executives do and try to justify this expense in IT terms. However, equipped with your stakeholder information, you know that the CFO holds responsibility for Sarbanes-Oxley audits with the CEO. You know from your stakeholder map the CFO must support the CEO and that auditors using SAS-70 will perform parts of the audit. Therefore, you position the expanded Incident Management software as an important investment required to comply with SAS-70 audit requirements for Sarbanes-Oxley and others.

7. **Repeat.** Perform this process of stakeholder identification (driver, role, person, influencers, and map) for each major undertaking in IT. Align your IT goals and plans around meeting stakeholder needs, using terms they understand. Refrain from techno-babble and focus on those things for which your stakeholder is responsible, and are measurable. Communicate and report using terms and phrases that tie your needs to those of your stakeholders. In effect, what you are doing helping your stakeholders achieve their non-IT goals through your IT goals. One last marketing cliché here "*no one ever bought a drill because they wanted a drill; they wanted a hole in the wall.*"

This approach may sound like common sense, but as in all things, thinking it through and having a plan delivers benefits that are more consistent. As a side note, the above steps are what drive the CSIP too! If you do

delivers benefits that are more consistent. As a side note, the above steps are what drive the CSIP too. If you do not have such a plan already in place, you should consider one. Such a map is of course not the justification, but provides you with a plan for justification. Using your stakeholder map you will plan your course of action, deciding whom to approach, in what order, and what you will say and do along the way.

Some may feel this is an unnecessary step, perhaps that it is even manipulative. Others may feel this is self-evident, and that enlightened management does not require such machinations. However, IT competes with all the other business processes for mindshare and budget. Compete is the correct word here. In a competition, the teams and players all have a game-plan, they understand their roles, they carry out their plans, individually and then together as a team. If you don't know where you are going there is a very good chance that you will get nowhere!

There is much more to selling ITIL to the top than these 7 steps, but this is a good starting point. This example focuses on and audit and control motivation; you can use the same approach for any business or mission benefit or objective as well. This process is how you sell ITIL to the top. It is perfectly viable to have multiple maps, for example, one for business/mission drivers with audit and control; and another for business/market drivers with sales and marketing goals.

Use your imagination and this process to physically represent how IT supports any non-IT endeavor and how to justify that IT activity. Ultimately, every single person, project, process, activity, and role in IT must map back to a business or mission driver -- otherwise, why are you doing it? Over time, expand your maps to take into account all of IT.

There is another real benefit to this process -- the next time you find yourself in the presence of a stakeholder you will be able to communicate about things they care about, in their terms. Once you start this process, be aware that it will change both how you perceive your organization, and how your stakeholders perceive you. Keep your maps updated. You will find these maps invaluable as you manage and grow!

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