COURSEWARE

THE ISM FOUNDATION COURSEWARE

Version 5

The road to customer value driven by practical modern IT Service Management

Van Haren PUBLISHING

The ISM Foundation
Courseware version 5

Colophon

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Publisher about the Courseware

The Courseware was created by experts from the industry who served as the author(s) for this publication. The input for the material is based on existing publications and the experience and expertise of the author(s). The material has been revised by trainers who also have experience working with the material. Close attention was also paid to the key learning points to ensure what needs to be mastered.

The objective of the courseware is to provide maximum support to the trainer and to the student, during his or her training. The material has a modular structure and according to the author(s) has the highest success rate should the student opt for examination. The Courseware is also accredited for this reason, wherever applicable.

In order to satisfy the requirements for accreditation the material must meet certain quality standards. The structure, the use of certain terms, diagrams and references are all part of this accreditation. Additionally, the material must be made available to each student in order to obtain full accreditation. To optimally support the trainer and the participant of the training assignments, practice exams and results are provided with the material.

Direct reference to advised literature is also regularly covered in the sheets so that students can find additional information concerning a particular topic. The decision to leave out notes pages from the Courseware was to encourage students to take notes throughout the material.

Although the courseware is complete, the possibility that the trainer deviates from the structure of the sheets or chooses to not refer to all the sheets or commands does exist. The student always has the possibility to cover these topics and go through them on their own time. It is recommended to follow the structure of the courseware and publications for maximum exam preparation.

The courseware and the recommended literature are the perfect combination to learn and understand the theory.

-- Van Haren Publishing

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Van Haren Publishing (VHP) specializes in titles on Best Practices, methods and standards within four domains:

- IT and IT Management
- Architecture (Enterprise and IT)
- Business Management and
- Project Management

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Topics are (per domain):

IT and IT Management

ABC of ICT
ASL®
CATS CM®
CMMI®
COBIT®
e-CF
ISO/IEC 20000
ISO/IEC 27001/27002
ISPL
IT4IT®
IT-CMF™
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ITIL®
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MSF
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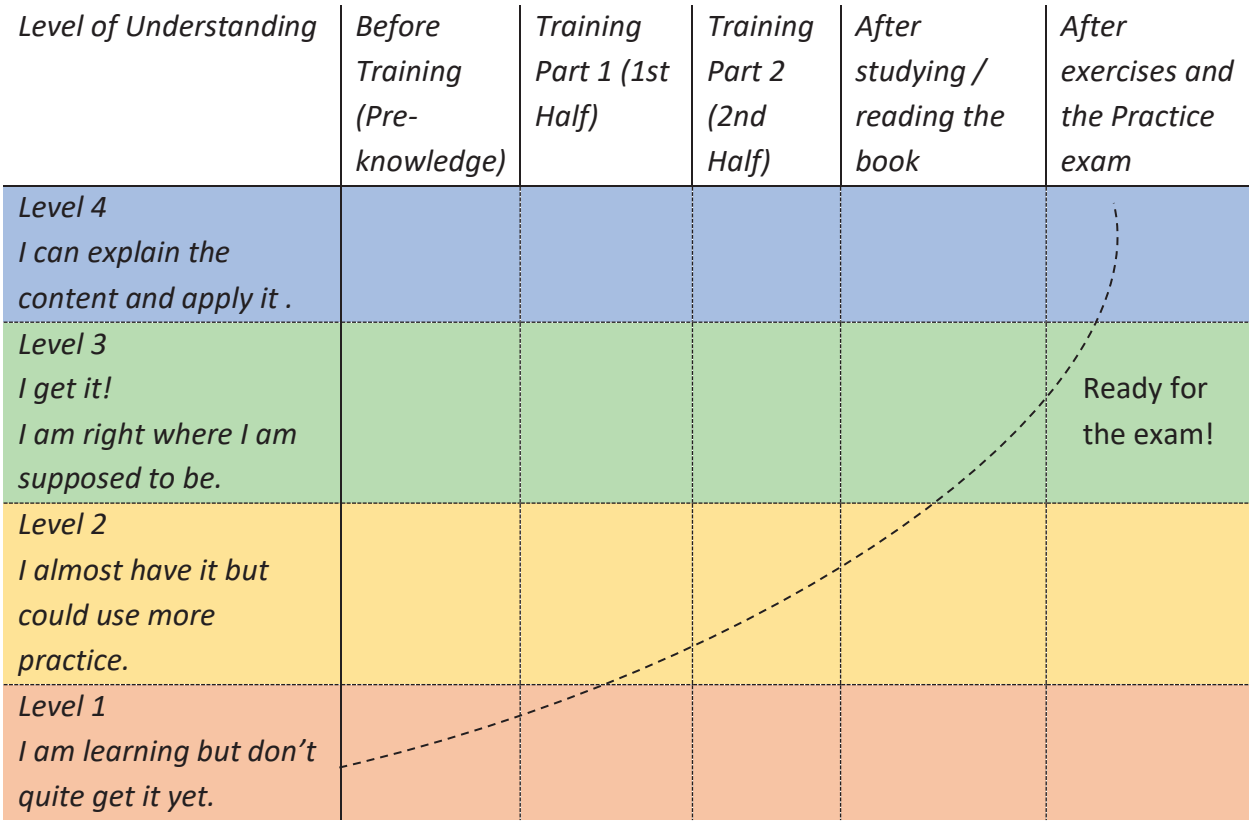
Self-Reflection of understanding Diagram

'*What you do not measure, you cannot control*.'' – Tom Peters

Fill in this diagram to self-evaluate your understanding of the material. This is an evaluation of how well you know the material and how well you understand it. In order to pass the exam successfully you should be aiming to reach the higher end of Level 3. If you really want to become a pro, then you should be aiming for Level 4. Your overall level of understanding will naturally follow the learning curve. So, it's important to keep track of where you are at each point of the training and address any areas of difficulty.

Based on where you are within the Self-Reflection of Understanding diagram you can evaluate the progress of your own training.



(Self-Reflection of Understanding Diagram)

Write down the problem areas that you are still having difficulty with so that you can consolidate them yourself, or with your trainer. After you have had a look at these, then you should evaluate to see if you now have a better understanding of where you actually are on the learning curve.

Troubleshooting

Problem areas:	*Topic:*
Part 1	
Part 2	
You have gone through the book and studied.	
You have answered the questions and done the practice exam.	

Agenda

Program - Day 1

Block 1: About services and customer value

Block 2: ITSM and ISM, a field in motion

Block 3: Services: actions, processes & value streams

Block 4: People

Block 5: Management

Program - Day 2

Block 6: Processes of an IT-service-organization

- Strategy Management
- Service Level Management
- Improvement Management
- Change Management
- Incident Management
- Knowledge Management
- Operations Management

Block 7: Exam & evaluation

ISM FOUNDATION - DAY 1

Foundation in IT service management based on the ISM method.

Introductions

1 **NAME**
What's your name?

2 **ORGANIZATION**
For which organization/department do you work?

3 **FUNCTION/ROLE**
In which position and/or role are you employed?

4 **EXPECTATIONS**
What are your expectations for this training?

PROGRAM – DAY 1

BLOCK 1: ABOUT SERVICES AND CUSTOMER VALUE

Insight into IT services. The IT organization is much larger than the IT department.

BLOCK 2: ITSM AND ISM, A FIELD IN MOTION

Insight into ITSM and ISM and the many developments that are active in the field.

BLOCK 3: SERVICES: ACTIONS, PROCESSES & VALUE STREAMS

Insight into IT services, core processes and collaboration with other parties in the chain.

BLOCK 4: PEOPLE

Insight into the roles of people and the behavior of professionals and leaders.

BLOCK 5: MANAGEMENT

Insight into the management of the creation of services and setting up the way of working.

PROGRAM – DAY 2

BLOCK 6: PROCESSES OF AN IT SERVICE ORGANIZATION

Gain insight into the seven ISM processes and their interdependence in the ISM process model.

- Strategy Management (STM) POSITION
- Service Level Management (SLM) AGREE
- Improvement Management (IMP) IMPROVE
- Change Management (CHM) CHANGE
- Incident Management (INC) RESTORE
- Knowledge Management (KNM) INFORM
- Operations Management (OPS) DELIVER

BLOCK 7: EXAM & EVALUATION

Insight into the exam methodology and preparation, and completing the training with evaluation.

BLOCK 1

CUSTOMER VALUE & SERVICES

Customer value

The customer determines the value of the service.

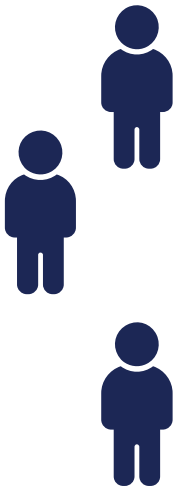
Features of the service

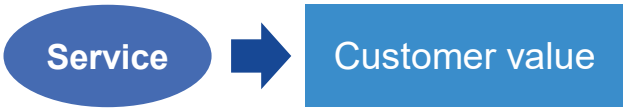
Delivery of functioning functionality.

The IT organization

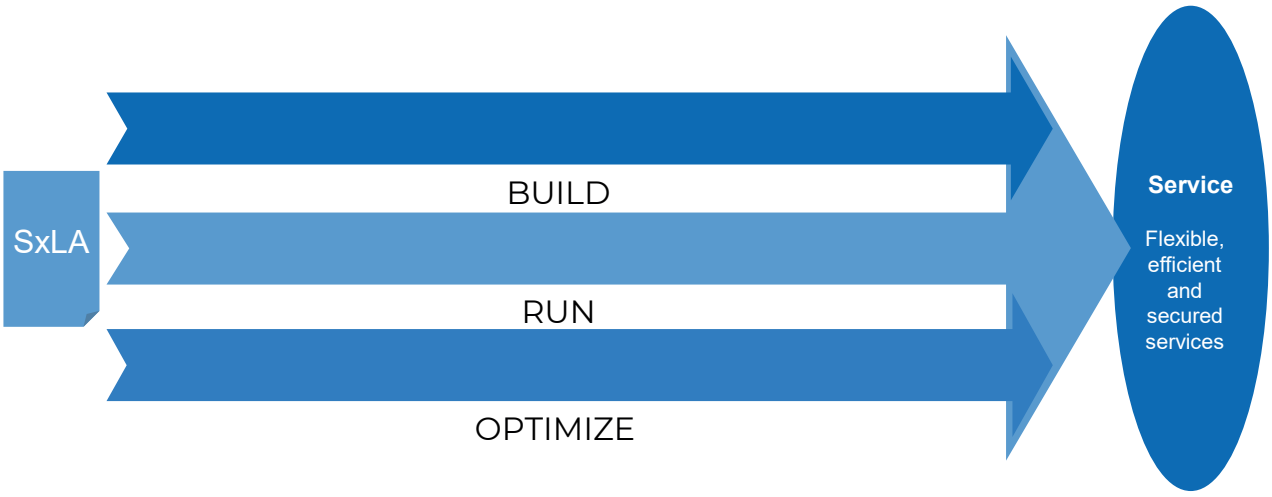
The IT organization is larger than the IT department.

Our customers expect added value





Three value streams



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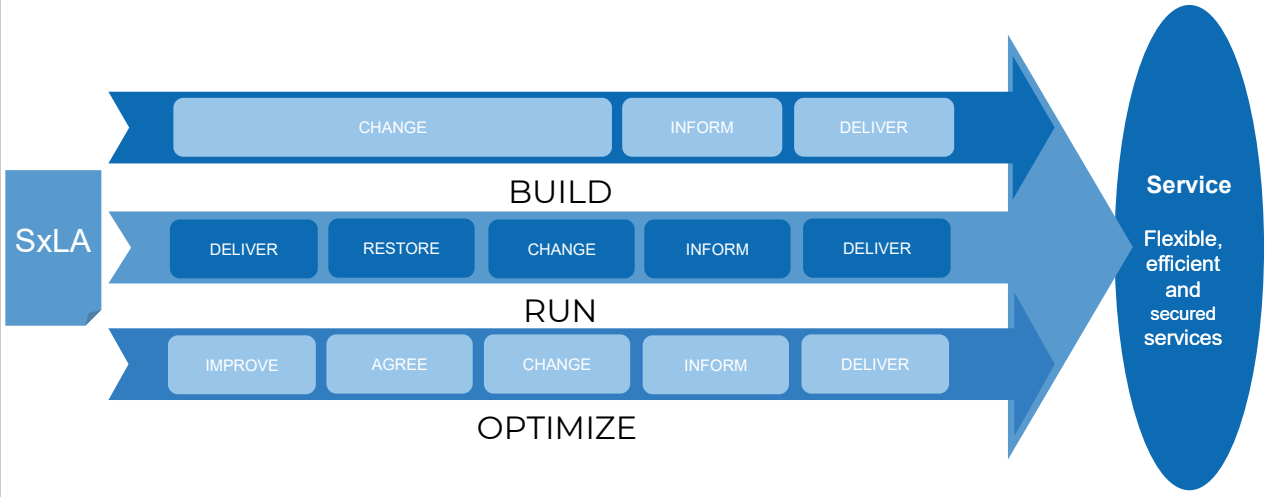

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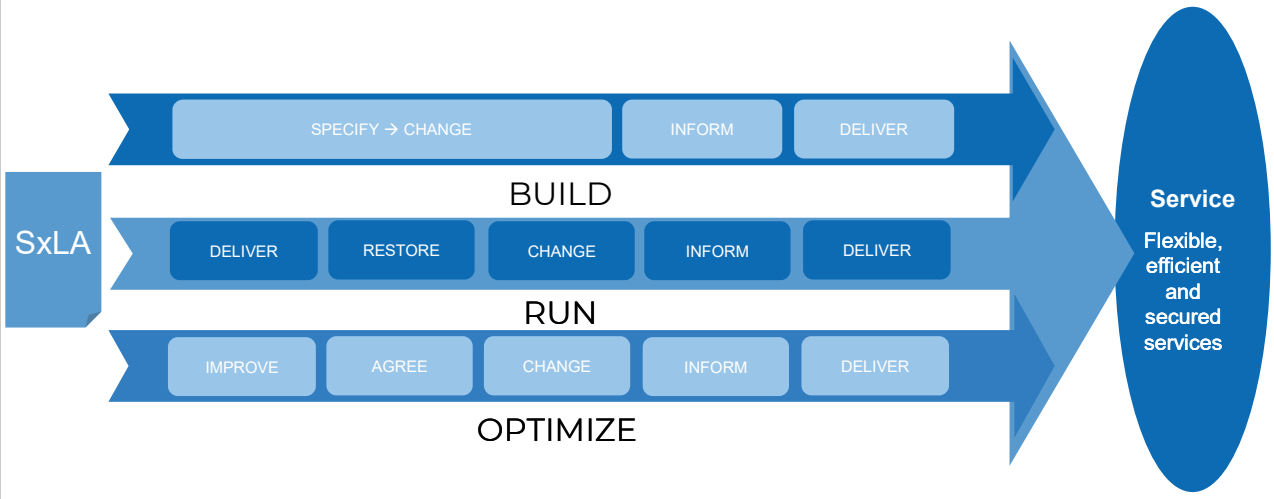
Three value streams



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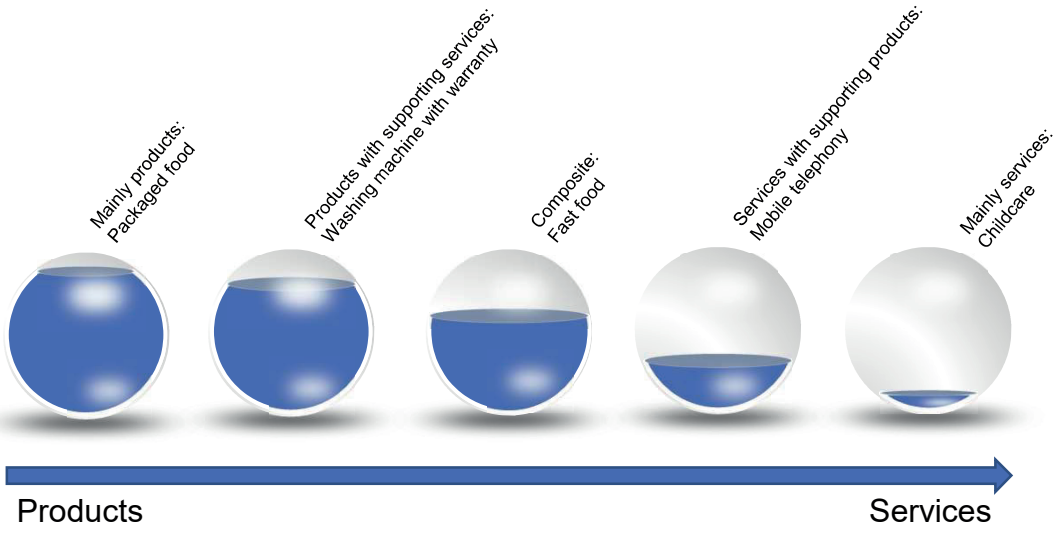
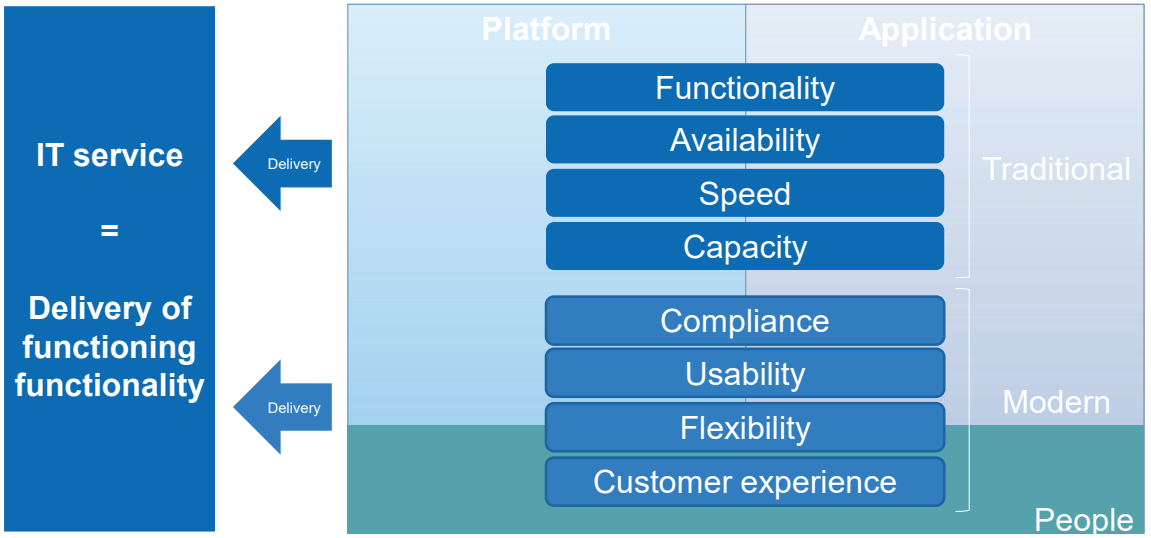
Questions

- What is an IT service? = Delivery of functioning functionality
- What is an example of an IT service?
- What are the tangible and intangible parts of an IT service?

Services vs products



Properties of an IT service



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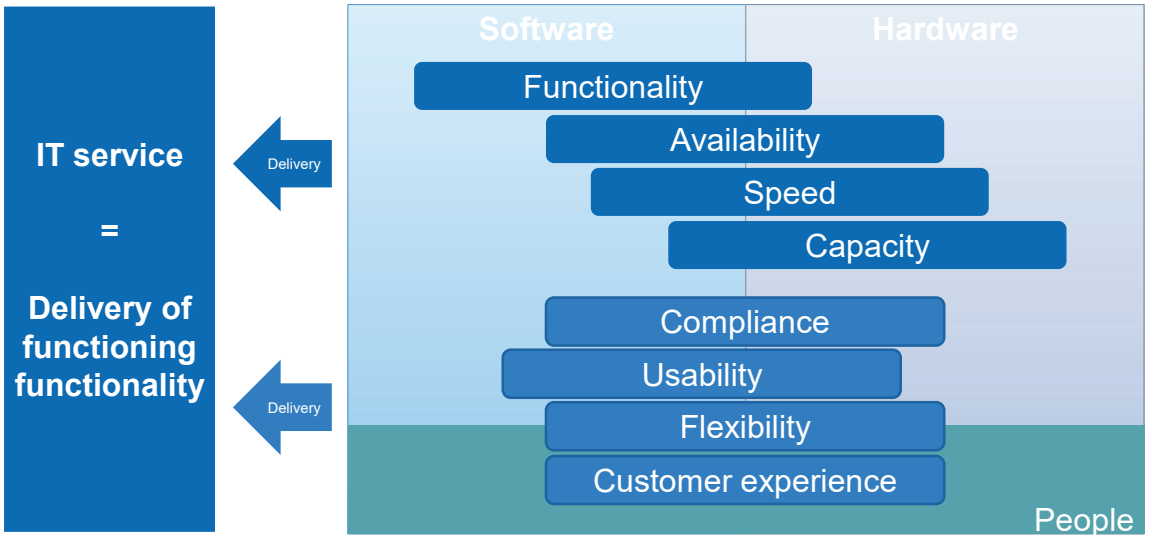
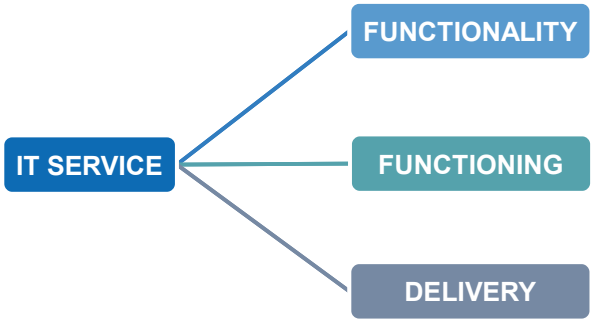


The structure of an IT service



ISM definition of IT service:

"Delivery of functioning IT functionality."

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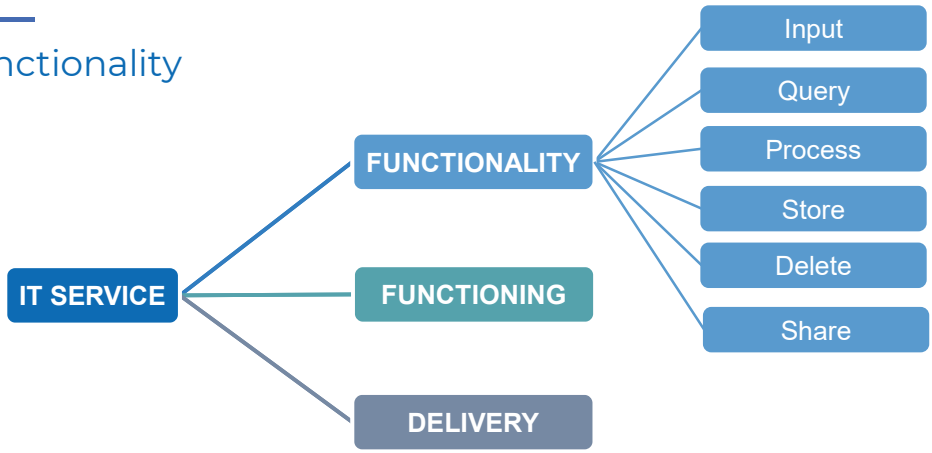
Functionality



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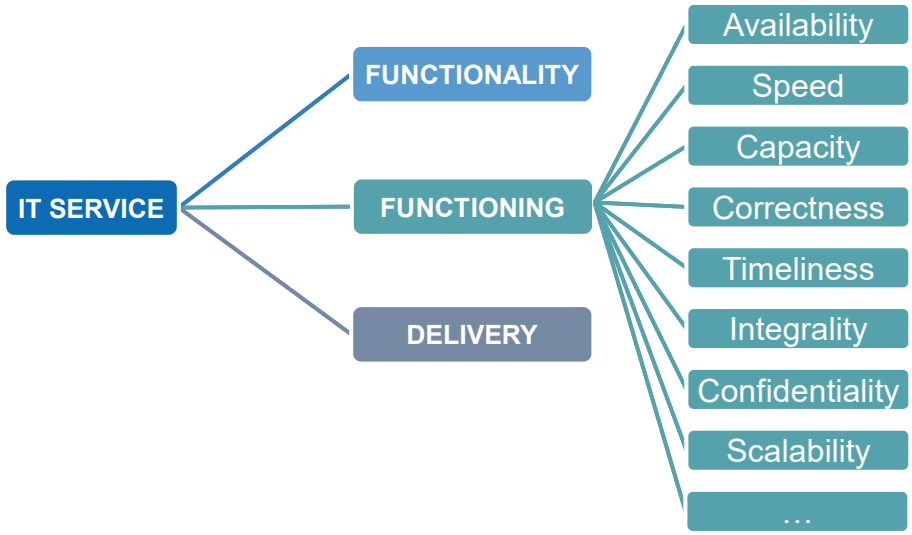
Functioning



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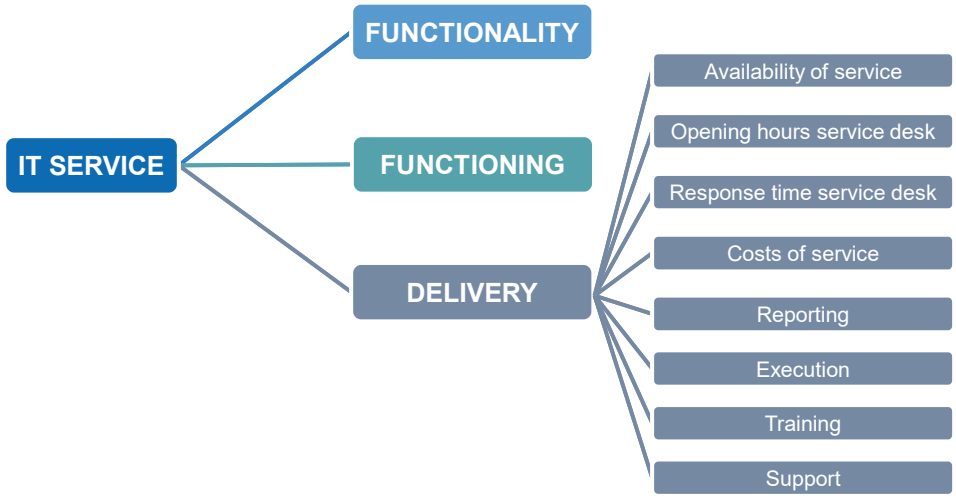
Delivery



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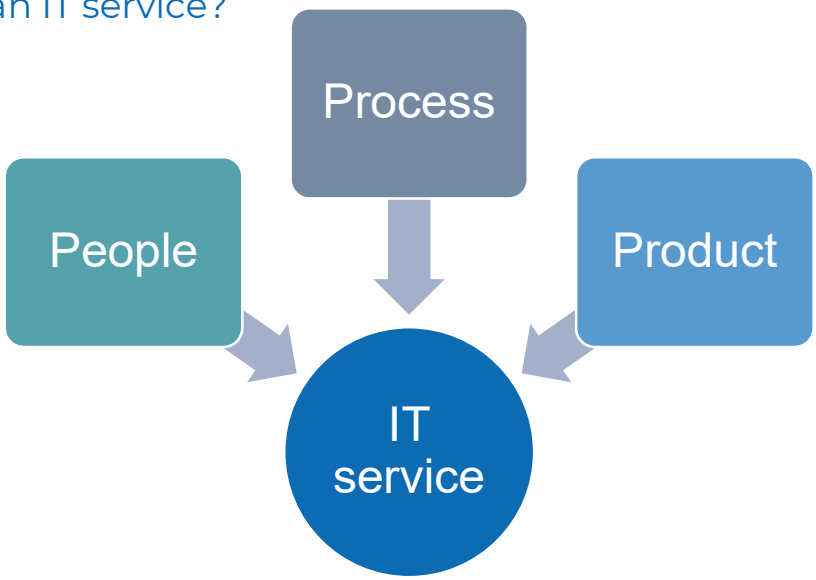
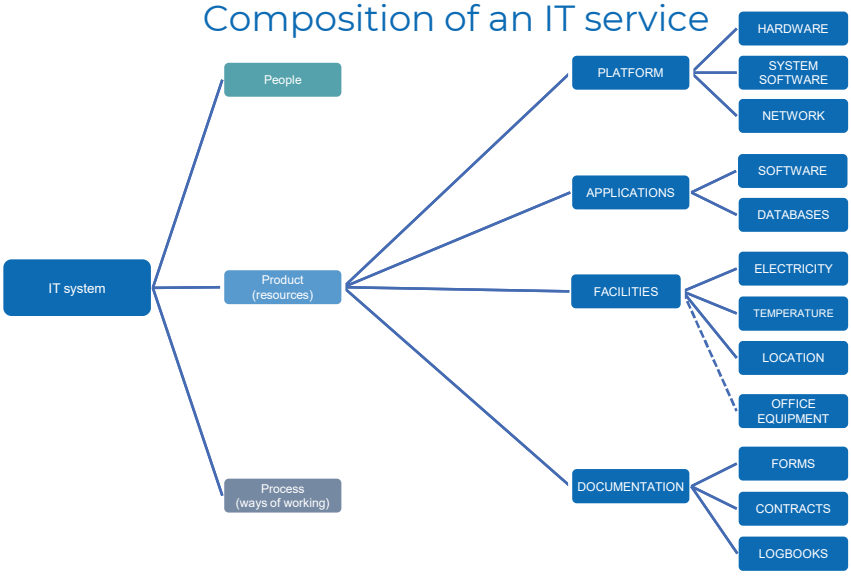
Composition of an IT service?



Composition of an IT service



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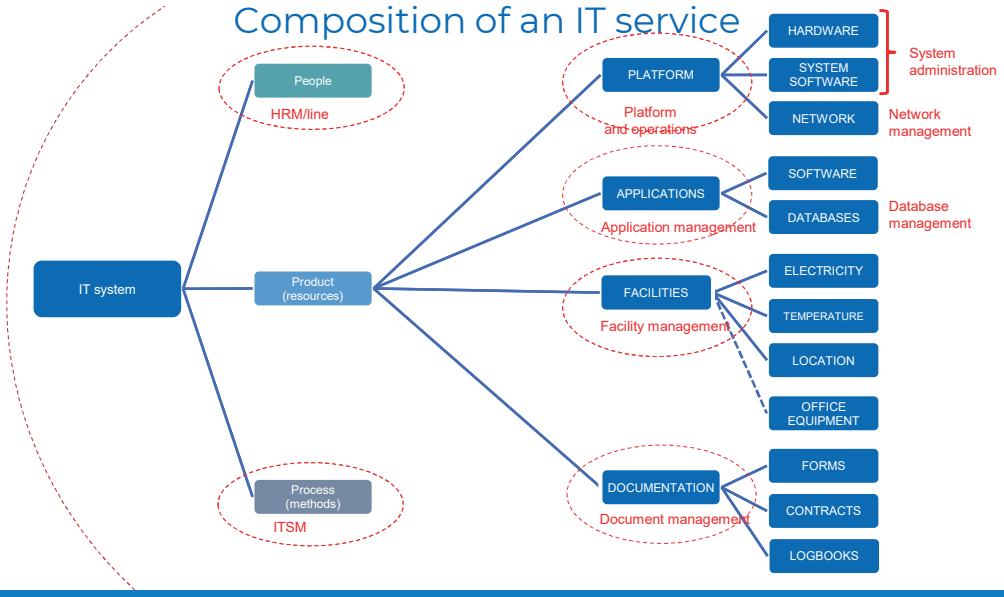


Group assignment

What

Answer the following questions on a flipchart:

1. What does an IT person do all day?
2. Why do they that?
3. When do they do that well?

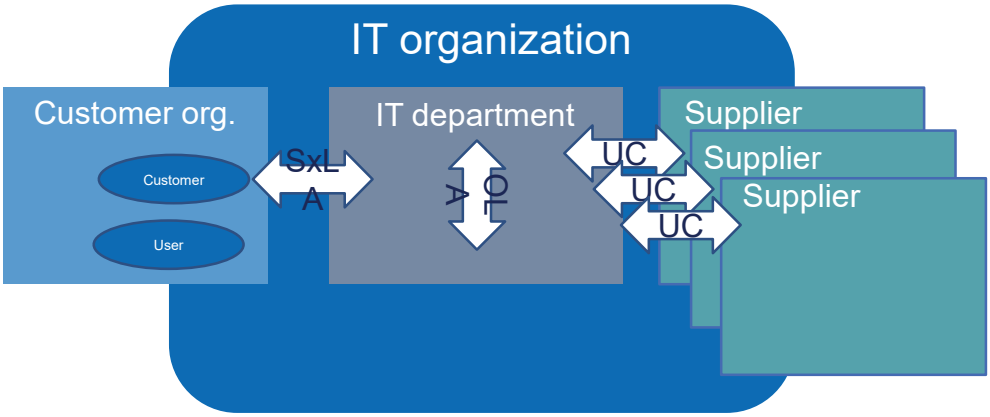
Time

10 minutes.

Present

One person presents the results to the other groups .

The IT organization is larger than the IT department



BLOCK 2

THE FIELD: ITSM & ISM

IT service management

Organizing the IT organization's way of working.

Practice, process & procedure

From one theoretical concept to a practically applicable holistic approach.

The ISM design principles

The principles upon which ISM is based.

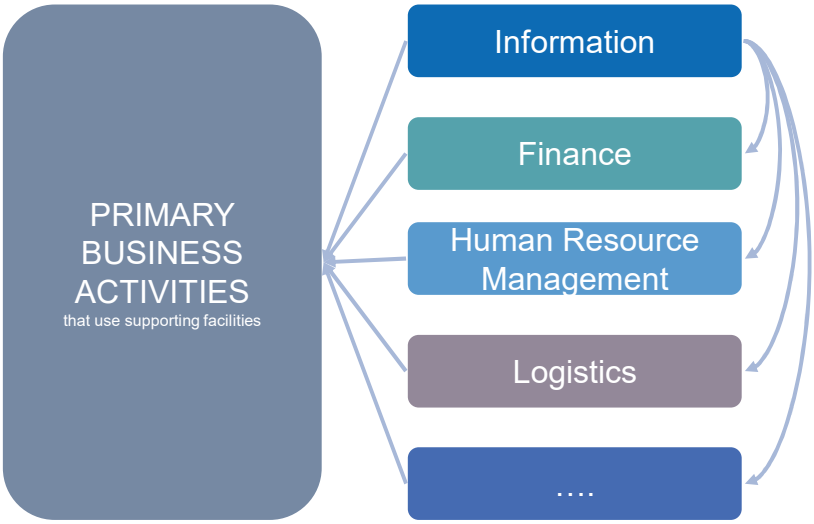
Working in IT services

As an **IT ORGANIZATION,** we come with the **CUSTOMER** to **AGREEMENTS** about IT **SERVICES.**

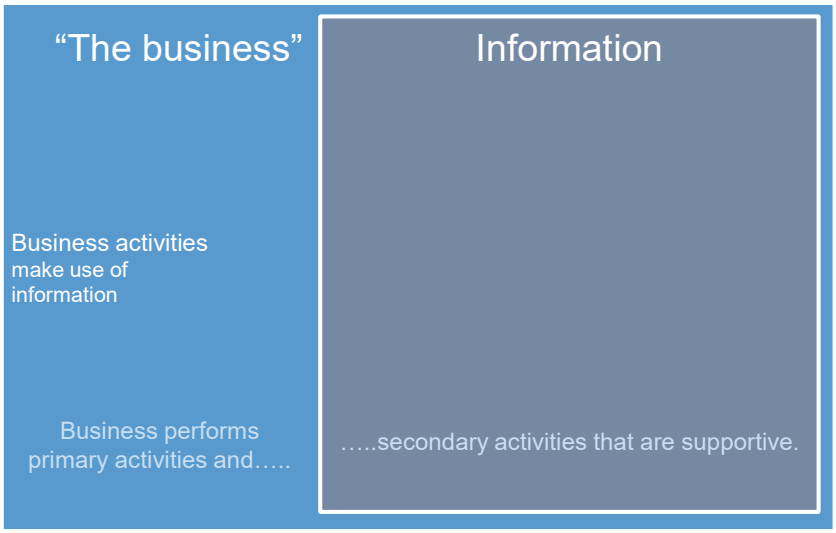
We design, create and provide IT services according to the **WAY OF WORKING** in which **PEOPLE** work according to **PROCESSES** using **PRODUCTS** (tools, documentation, instructions).

Everything we do must add **VALUE** for the customer and/or IT organization!

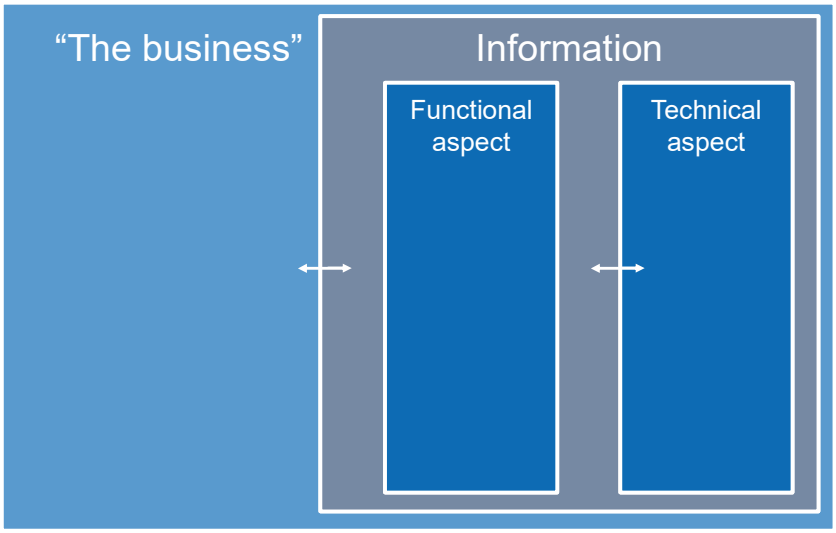
Primary and secondary activities



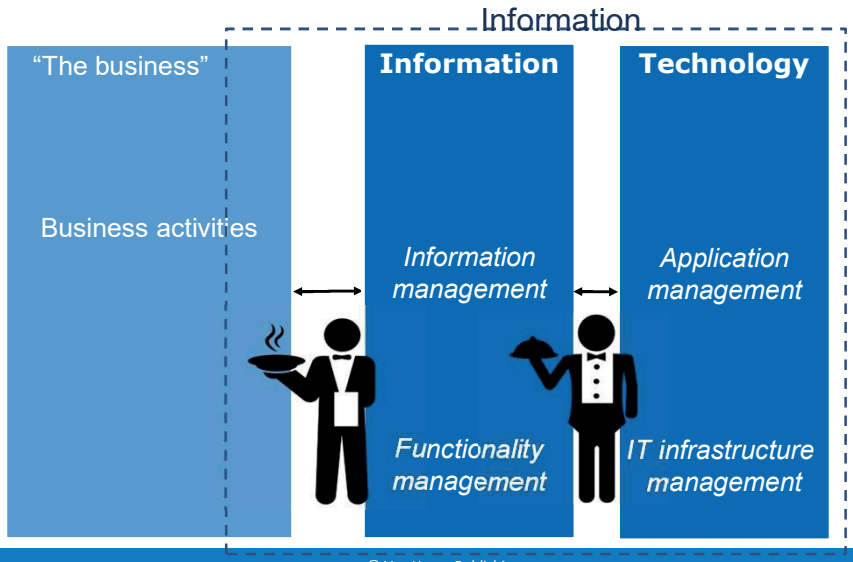
Primary and secondary activities



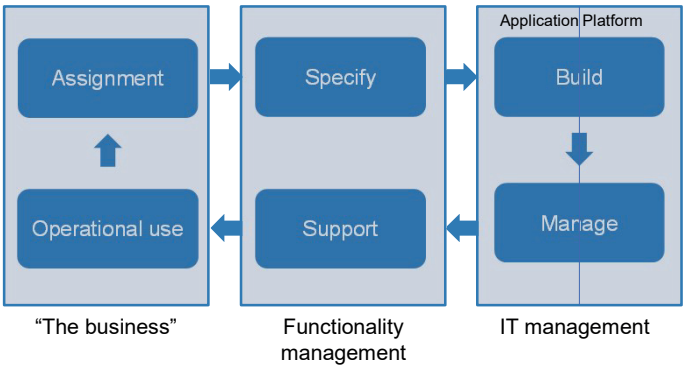
Primary and secondary activities



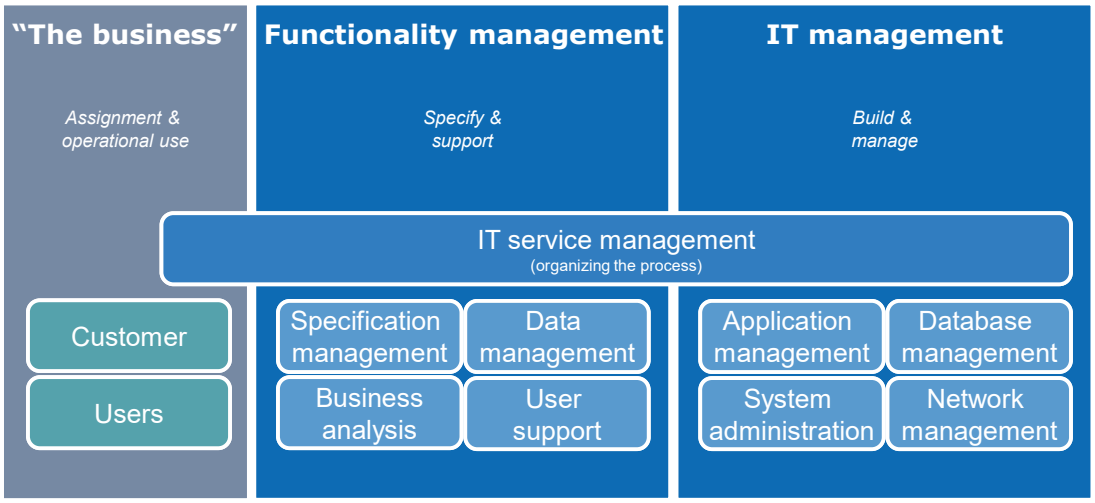
Primary and secondary activities



The lifecycle of an IT service



Roles in IT services



IT service management

Is **organizing** the **way of working** to realize **IT services**

Set up and **manage**

People, process, product
"the way it is realized"
(practice)

Delivery of functioning functionality

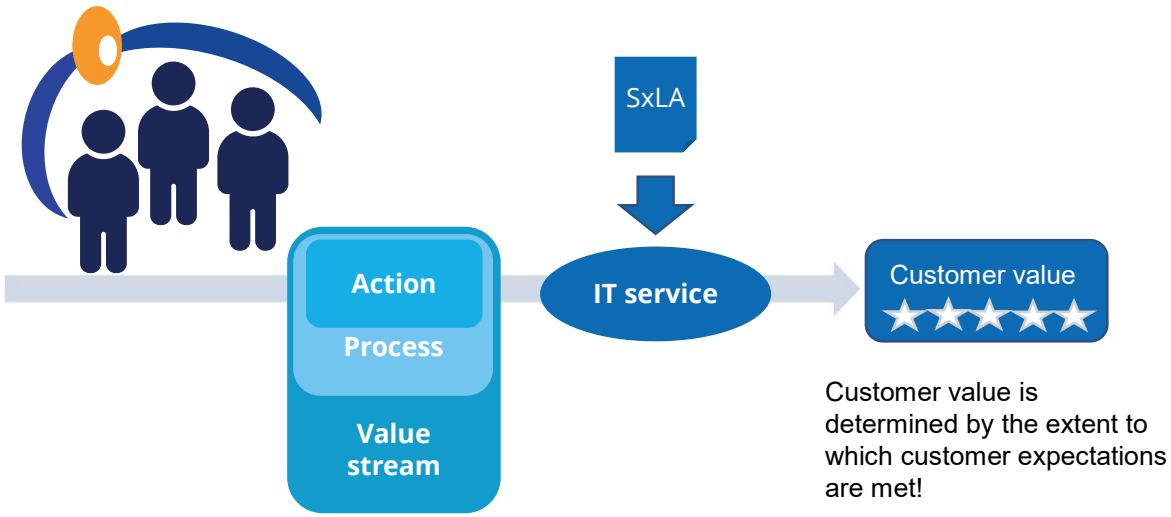
Output

Outcome

ISM principles and starting points

- Customer value: Everything is aimed at creating customer value.
- Co-creation: Creating services requires collaboration.
- Holistically: The whole set of resources matters.
- Integration: Integration of people, process and product is a must.
- Flow: Process steps add value, without 'downtime'.
- Keep IT simple: Don't make it too complex.
- Standardization: Standardization ensures simplicity.
- Continual improvement: Weaknesses are addressed.
- Automate: Support people and process with the right products.

The ISM operating model



Customer value is determined by the extent to which customer expectations are met!

BLOCK 3

CREATING SERVICES

Processes & the process model

As part of the way of working in the ISM operating model.

The ISM process model

From the classic ISM process model to the modern ISM process model.

Value streams

Through run, build & optimize to added value for the customer.

TERMINOLOGY

Processes

Input
The trigger that starts the process.

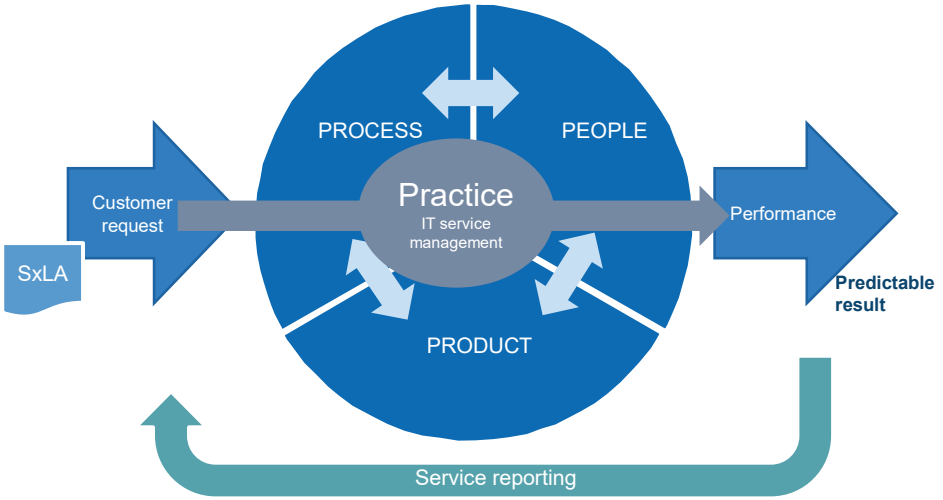
Process
A goal-oriented sequence of activities.

Output
The result of the process.

Outcome
The degree of success of the process that determines customer satisfaction.

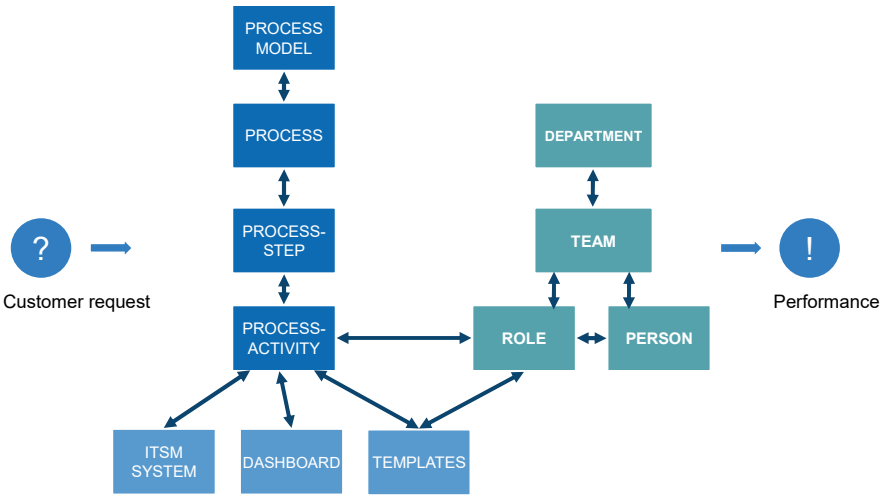
The structure of a service provider

An IT service provider must be managed just like any other organization.



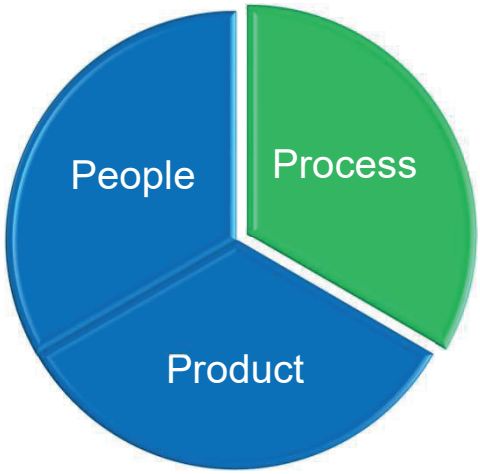
The ISM relationship model

Company assets for managing services.



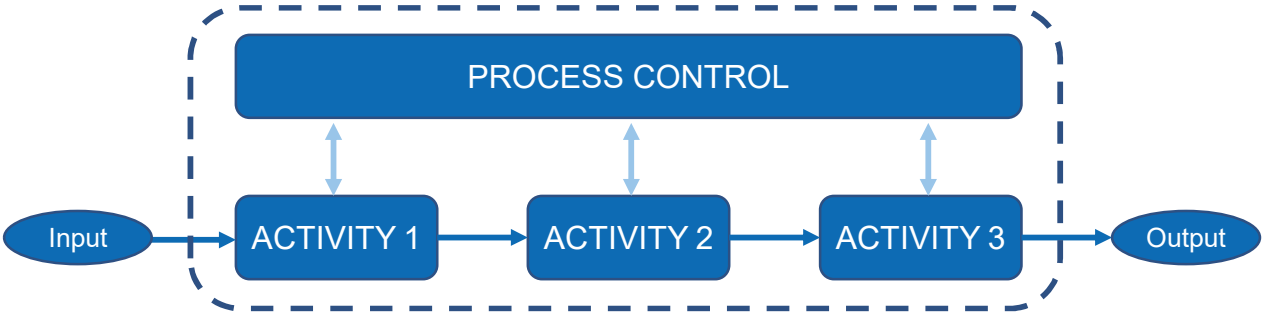
People, **process,** product

People *do things* with things.



What is a process?

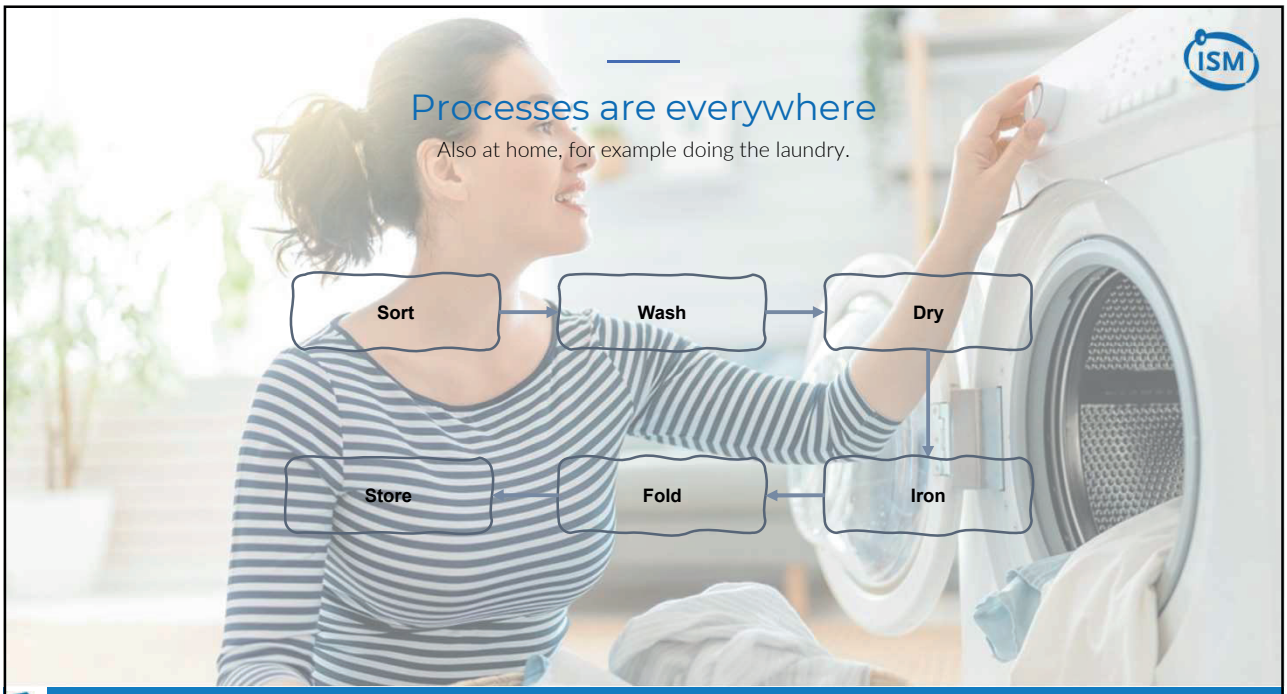
A goal-oriented organization of activities.



A series of activities, with a trigger and a predetermined outcome,
provided with guidance on achieving that outcome in accordance with the agreed manner.

Processes are everywhere

Also at home, for example doing the laundry.



Characteristics of processes

- Processes are **always** present.
- Every organization chooses how they manage processes:
  - *Not at all, recognize, describe, guide, prescribe,* ***or*** *oblige.*
- Processes are **goal-oriented** (*natural*) **sequences** of **activities**.
- A process describes **WHAT** must happen in sequence, not WHO or HOW.
- A *process model* structures the processes.
- Processes are, just like people and product, part of the way of working of **practice**.

GROUP ASSIGNMENT

What

Describe the process **RESTORE** (Incident Management) on a flipchart.

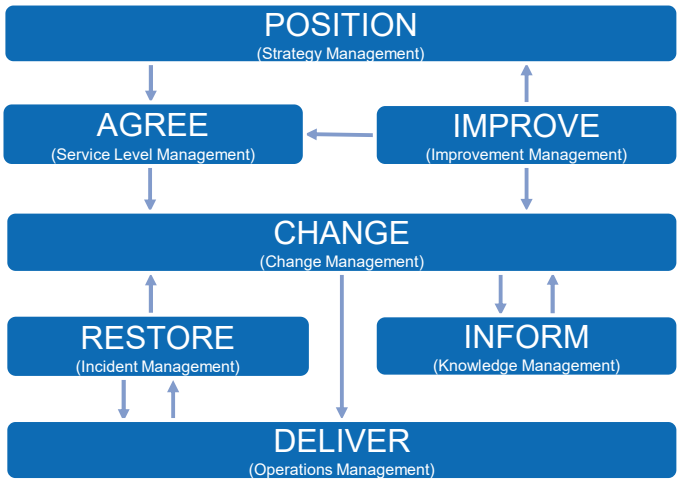
Time

10 minutes.

Present

One person presents the results to the other groups.

The ISM process model with seven processes



Group assignment

What

Answer the following questions:

1. What are the benefits of process-based working?
2. What are the disadvantages of process-based working?

Time

10 minutes.

Present

One person presents the results to the other groups.

Benefits and disadvantages of process-based work

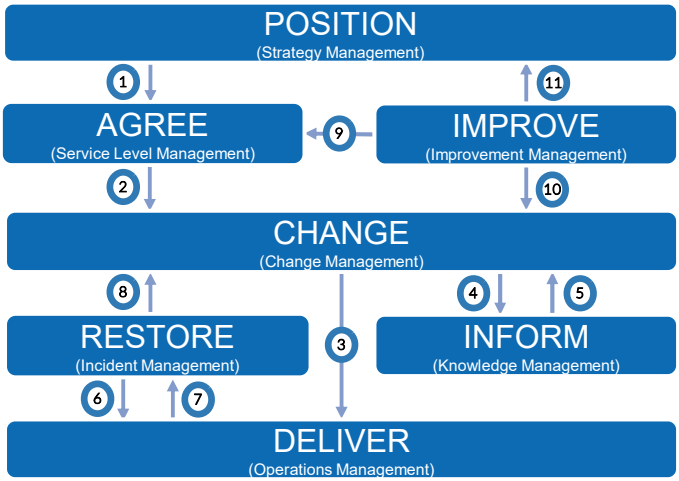
With efficient processes:

- Predictable quality
- Transferability of work
- Risk reduction
- Time savings
- Overview of the work
- Comply with quality standards
- Greater efficiency
- Improve collaboration
- . . .

For inefficient processes:

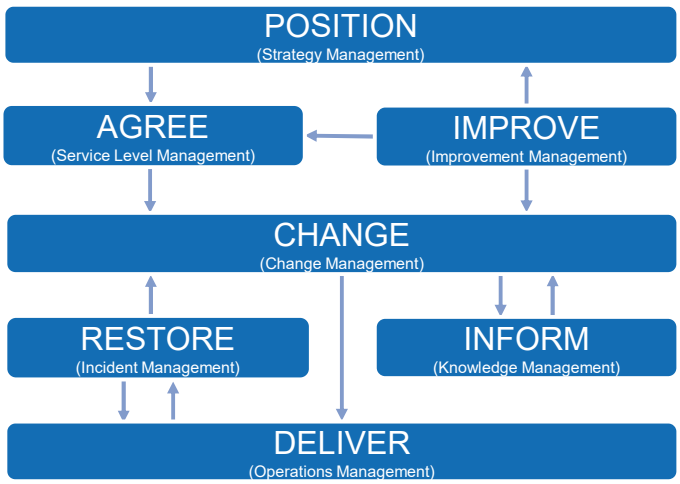
- Slow/viscous
- Bureaucratic
- Awkward
- Annoying
- Illogical
- Unclear
- . . .

11 process triggers

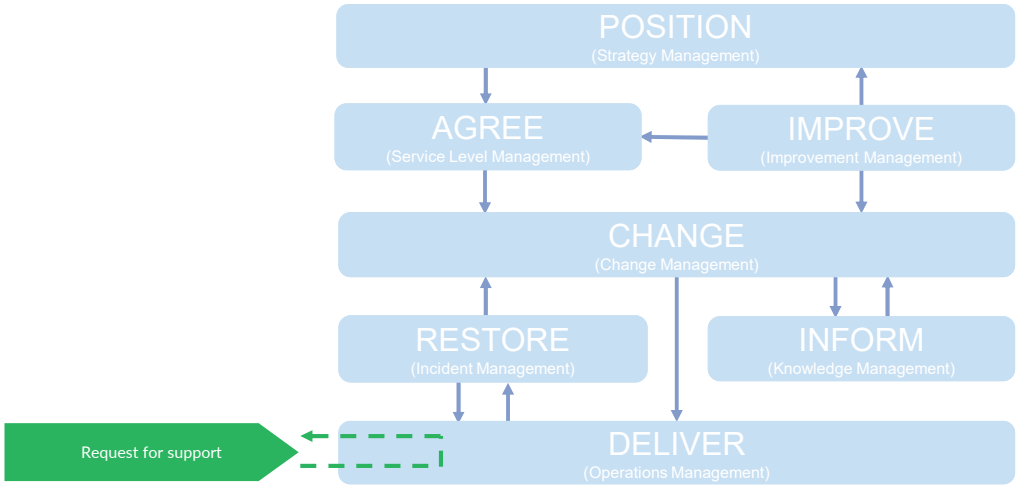


1. Policy changes may lead to the need for revised agreements.
2. Requests for new IT services or modified agreements can lead to RFCs .
3. All implementations are planned by, and executed under the responsibility of, the OPS process.
4. Executed changes lead to changes in the KMS.
5. Deviations found in the QMS must be investigated by means of an RFC.
6. Detected incidents can be handled by means of a reset.
7. Incidents identified by monitoring are reported.
8. Some incidents must be corrected by making a change.
9. In order to limit risks, new agreements sometimes have to be made.
10. In order to limit risks, changes sometimes have to be made.
11. In order to limit risks, the policy sometimes has to be adjusted.

Process flows



Process flows



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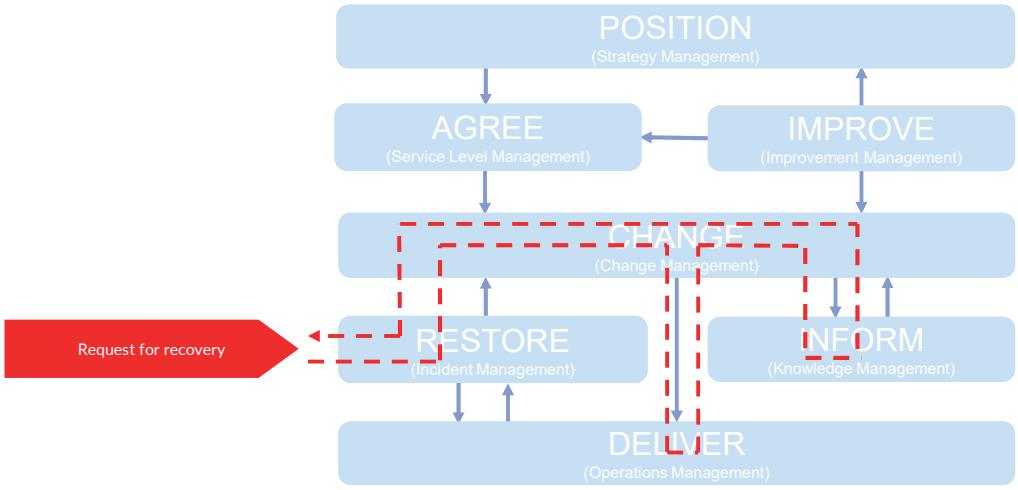
Process flows



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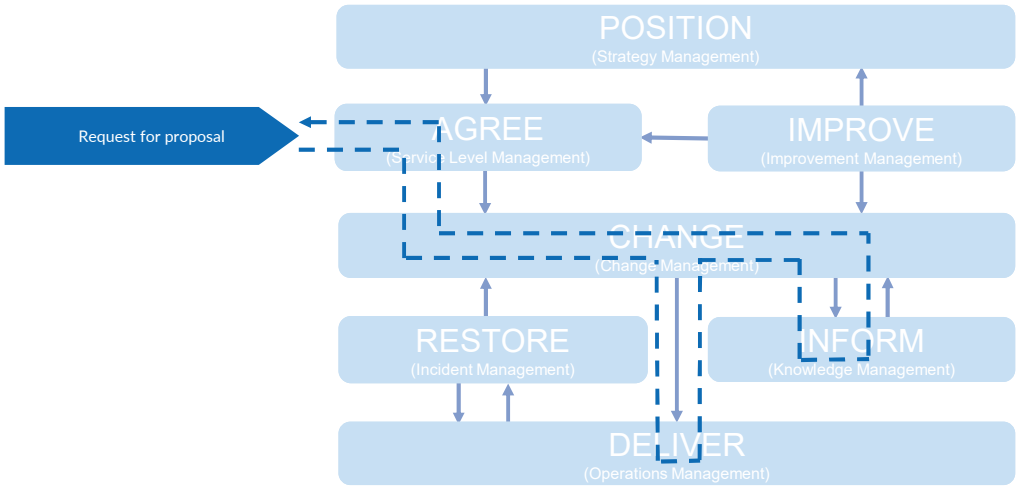
Process flows



Case 1

The process flow for resetting a hung server can be as follows:

A INC → OPS → CHM → KNM → CHM → INC

B INC → OPS → INC

C OPS → INC

D INC → CHM → OPS → CHM → KNM → CHM → INC

Case 2

The process flow for replacing a PC CANNOT be as follows:

A OPS → INC → CHM → OPS → CHM → KNM → CHM → INC → OPS

B INC → CHM → OPS → CHM → KNM → CHM → INC

C CHM → OPS → CHM → KNM → CHM

D OPS

Case 3

The process flow for issuing a new password can be as follows:

A INC → OPS → INC

B INC

C OPS

D CHM → OPS → CHM → KNM → CHM

Case 4

During a verification it is found that a printer has disappeared. Another printer needs to be installed. Which process flow must be followed?

A INC → OPS → INC

B INC → CHM → OPS → CHM → KNM → CHM → INC

C KNM → OPS → KNM

D KNM → CHM → OPS → CHM → KNM → CHM → KNM

Case 5

The process flow for replacing a broken monitor that keeps causing malfunctions CANNOT be as follows:

A INC → OPS → INC

B IMP → CHM → OPS → CHM → KNM → CHM → IMP

C IMP → OPS → IMP

D CHM → OPS → CHM → KNM → CHM