ITIL - A Service Catalog Overview

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CA

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Abstract

• Many organizations have been looking to Best Practices to assist them with in aligning IT to the Business.

• This session will discuss the role of the Service Catalog, its relationship to SLM, what the key components are and how to implement and automate them.
ITIL® is a registered trademark of OGC - the Office of Government Commerce.
Once you have Service Level Agreements you’ll want to monitor them
We only wanted a snack – do we really have to pay all that for a cup of tea?

Just make me a meal which is warm and filling. We just want something quick and savoury, and we have 30 mins or we’re off to McDonald’s.

I don’t eat often, but I must eat. Now I need to eat the usual, except we have to decide – we just need a quick meal with things we wouldn’t normally eat. I don’t want to eat too much for lunch, so I need to have something which can be eaten in 30 mins or we’ll have to eat there.

We need to have a meal ready, in case I come late. I don’t want to eat at home – I want to eat something which is quick and filling and savoury. I don’t want to spend too much money on a cup of tea.
The Challenge: to Deliver Service

Infrastructure

Provider

Consumer

Operational Processes

Defined Requirements
Restaurants and SLM

Supply & Disposal processes

Recipes (Config !)
Changes
New dishes
Order foodstuff
Manage spend
Operations

Take orders
Incidents
Problems
Customer Care
Expectations

Right Cost
Right Quality
Right Timeframe
Retention /
Revenue
The Result

A connection between quality, cost and value
Service Level Management
The Big Picture, of What We Use….

Service Delivery

- Availability Management
- Capacity Management
- IT Service Continuity Management
- Financial Management for IT Services

Business, Customers or Users

Service Support

- Incident Management
- Problem Management
- Change Management
- Release Management
- Configuration Management

CMDB
The Service Delivery Process Model

Availability
- Availability Plan
- AMDB
- Design Criteria
- Targets/Thresholds
- Reports
- Audit Reports

Service Level Management
- Requirements
- Targets
- Achievements
- Service requests
- Service catalogue
- SIP
- Exception reports
- Audit reports

Capacity
- Capacity Plan
- CDB
- Targets/Thresholds
- Capacity Reports
- Schedule
- Audit Reports

Management Tools
- Queries
- Enquiries
- Communication
- Updates
- Reports

Capacity Alerts

IT Financial Management
- Financial Plans
- Types & Models
- Costs & Charges
- Reports
- Budgets & Forecasts
- Audit Reports

IT Service Continuity
- IT Continuity Plans
- BIA & Risk Analysis
- Define Requirements
- Control Centers
- DR Contacts
- Reports
- Audit Reports

The Business, Customers & users
- SLA’s, OLA’s, SLR’s
- Service requests
- Service catalogue
- SIP
- Exception reports
- Audit reports

Queries Enquiries

Communication Updates Reports

Management Tools
- Availability
- Capacity
- Service Level Management
- IT Financial Management
- IT Service Continuity

Alerts Exceptions Changes

Updates

Reports
Service Level Management

Service Level Management ensures agreement to and monitoring of an optimal level of IT service - in close cooperation between the providers and suppliers.

The “User” is the person using the service. The “Customer” is the one who pays for the service. They can be the same....
Service Level Management

To maintain and improve IT service quality through a constant cycle of agreeing, monitoring and reporting to meet the customers’ business objectives
Benefits - Running IT as a Business

- Managing the demand for and supply of IT services to deliver high quality at the appropriate cost
- Aligning IT priorities with business priorities
- Understanding the business process and being able to manage it
- Deliver and support IT service levels desired by the business
- Creating an information architecture that delivers flexibility and supports decision making and compliance
- Understanding IT service requirements and defining them in dialog with business consumers
- Mapping defined business objectives to existing infrastructure and operational capabilities
- Establishing metrics that can help out quantify and define IT services
Key Definitions

- Service Level Agreement (SLA)
- Operational Level Agreement (OLA)
- Underpinning Contract (UC)
- Service Catalog
- Service Improvement Program (SIP)
- Service Level Requirements (SLR)
SLM Terminology

Service Catalog

A document which describes the Services provided and/or brokered to Customers by Information Services. The catalog forms the basis for the understanding of all services offered including hours of operation, functionality, features, components, charges, changes to service, etc.

Service Level Agreements (SLA)

A formal agreement between the customer and the service provider in which service provision is described and achievable targets are identified. This document forms the parameters for the service operation.
Operational Level Agreement (OLA)

A agreement which defines internal support requirements between the IT Support organization sub-groups. OLAs to be successful should ensure that SLA and UC targets can be achieved.

Underpinning Contract (UC)

An agreement (usually a signed contract) which defines the support requirements between the IT Organization and external vendors and partners. UCs are required to ensure both OLA and SLA targets can be achieved.
What Is An IT Service?

Service

• One or more technical or professional IT capabilities which enable a business process.
• Fulfills one or more needs of the customer
• Supports the customer’s business objectives
• Is perceived by the customer as a coherent whole

System

• An integrated composite that consists of one or more of the processes, hardware, software, facilities and people, that provides a capability to satisfy a stated need or objective.
• Collection of configuration items necessary to deliver an IT service
Service Level Agreements outline the levels of service that customers can expect.

Services satisfy client requirements.

Operating Level Agreements and Underpinning Contracts detail the required interactions of people, processes and technology to deliver on the stated levels of service.
Services & Processes & Functional Areas

Service Owner

Service 1

SLA

Process Owner

Process A

Process B

Process C

Process D

Process Owner

Process A

Process B

Process C

Process Owner

Process A

Process B

Manager

Technology (Tools)

People (Organization)
Service Definition Process

- Definition of Major Business Processes
- Define the IT Services
- Map IT Systems to IT Services
- Map IT Components to IT Systems

<table>
<thead>
<tr>
<th>Business Process</th>
<th>IT Services</th>
<th>IT Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>Email</td>
<td>MS Exchange</td>
</tr>
<tr>
<td></td>
<td>Voice</td>
<td>Lotus Notes</td>
</tr>
</tbody>
</table>
Service Breakdown Structure – an examples

Business Service Bundle

Business Service

IT Service Bundle

IT Service

IT Core Service

Service Component

End User Services

Email

PDA

Address List

Office Email

Web Email

Mobile email

Directory Service

Email Servers

Web Servers

Blackberry Server

Storage

LAN

WAN

Internet

LUN Allocation

Bandwidth

DNS

Routing

Firewall

Decomposition
Service Catalog Overview

- An IT service is a combination of one or more technical or professional IT capabilities that enable a business process or provide a business value.

- A service catalog contains a list of services along with specific terms and default parameters for services provided with the default levels and related options. It gives the organization a profile of the service provider and the users an overview of available services.

"The development of a robust IT product model is an initial keystone in "operating like a business" (even if accounting and chargeback is not necessary at the current time)" — METAGroup
Service Catalog

- Identifies the services offered
- Should reflect the default levels of service that would work for the majority of your organization
- This becomes a master SLA that allows for different levels of service to be driven from the default levels of service
- Doesn’t require an SLA for each customer
- Easier to update and maintain than separate SLA’s
- Accessible by the customer
- Non-technical document
- Includes a glossary of terms
The Service Catalog

- Defines the default services with the default levels of service and the options

Service Catalog

Options
Parameters
Levels

Request For Service

SLA

OLA
UC

SLA

Gold
Silver
Bronze
Service Catalog Outline

- Description of service
- Service hours
- Service availability
- Support levels
- Performance
- Functionality
- Charges
- Contingency

- Backup & Recovery
- Restrictions
- Report Distribution
- Amendments / Supplements
- Reviews
- Glossary
- SLA Templates
Creation of the Service Catalog

- Define Services
  - Create a Service Map or domain map for guidance
  - Define services around ITIL (at minimum reality check)
  - Ensure services follow major industry benchmark
  - Ensure services align to business strategy

- Define components of each Service Area
  - “Part Number” creation
  - Service Packages

- Define Roles for each Service
  - Customer Roles
  - Provider Roles

- Develop Service Level objectives

- Develop Operating Level Agreements (OLA’s) where services span functions

- Automate Services where possible
# Catalog Definitions

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Service Description</strong></td>
<td>Brief description of the service which explains what the service includes</td>
</tr>
<tr>
<td><strong>Service Exclusions</strong></td>
<td>Brief clarification regarding what is not included in the service</td>
</tr>
<tr>
<td><strong>Service Core Dependencies</strong></td>
<td>Listing of the underlying services and processes that are necessary for this service</td>
</tr>
<tr>
<td><strong>Service Options</strong></td>
<td>The various components/options available to users when ordering the service</td>
</tr>
<tr>
<td><strong>Service Hours</strong></td>
<td>The time period during which the service can be ordered</td>
</tr>
<tr>
<td><strong>Planned Down Time</strong></td>
<td>Time period during which the service is not available due to scheduled maintenance</td>
</tr>
<tr>
<td><strong>Service Availability</strong></td>
<td>Defined Service Hours during which service is available for requests</td>
</tr>
<tr>
<td><strong>Service Owner</strong></td>
<td>The person responsible for the service</td>
</tr>
<tr>
<td><strong>Service Users</strong></td>
<td>The intended group of requesters for this service</td>
</tr>
<tr>
<td><strong>Performance Measures</strong></td>
<td>Defined performance measurements for the service fulfillment with a base line target</td>
</tr>
<tr>
<td><strong>Key Performance Indicators</strong></td>
<td>Performance measurements which are primary indicators of the performance of the fulfillment of this service</td>
</tr>
<tr>
<td><strong>Key Goal Indicators</strong></td>
<td>The overall company benefit in regards to this service</td>
</tr>
<tr>
<td><strong>Collection Method</strong></td>
<td>An overview of the intended data collection method and frequency</td>
</tr>
<tr>
<td><strong>Charging Policies</strong></td>
<td>Charging Policy for the service</td>
</tr>
<tr>
<td><strong>Cost Categorization to Business Unit</strong></td>
<td>Definition of the cost categorization of the service in regards to various aspect (Direct vs. Indirect, Capital vs. Operational, Fixed vs. Variable, Cost Type, Cost Elements, Cost Units)</td>
</tr>
</tbody>
</table>
## Sample Catalog

### IT Support Services

<table>
<thead>
<tr>
<th>Hardware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Administration</td>
</tr>
<tr>
<td>Install/Move/Add/Change (IMAC)</td>
</tr>
<tr>
<td>Break/Fix</td>
</tr>
<tr>
<td>Retire/Disposal</td>
</tr>
<tr>
<td>Mtce/Support Perf Monitoring</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement</td>
</tr>
<tr>
<td>Install/Upgrade/Remove</td>
</tr>
<tr>
<td>Break/Fix</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
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</thead>
<tbody>
<tr>
<td>Acct Setup/term</td>
</tr>
<tr>
<td>Increase Mailbox</td>
</tr>
<tr>
<td>Archive Mailbox</td>
</tr>
<tr>
<td>Recover Mailbox</td>
</tr>
<tr>
<td>Email Dist List</td>
</tr>
<tr>
<td>Email Forms</td>
</tr>
<tr>
<td>SPAM Filter</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password Reset</td>
</tr>
<tr>
<td>Virus Protection</td>
</tr>
<tr>
<td>VPN Access</td>
</tr>
<tr>
<td>Appl Access</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Mgmt</th>
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</thead>
<tbody>
<tr>
<td>Backup/Restore</td>
</tr>
<tr>
<td>Retention Mgmt</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emp Self-Service</td>
</tr>
<tr>
<td>Knowledge</td>
</tr>
<tr>
<td>Service Levels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Special Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-going</td>
</tr>
<tr>
<td>Tactical</td>
</tr>
<tr>
<td>Strategic</td>
</tr>
<tr>
<td>Infrastructure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Audit Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual Office Setup</td>
</tr>
</tbody>
</table>

### Telecom

<table>
<thead>
<tr>
<th>Desk Phone/Accessories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voicemail</td>
</tr>
<tr>
<td>Mobile Phone/Accessories</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Handheld Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pager</td>
</tr>
<tr>
<td>Fax</td>
</tr>
<tr>
<td>Corp Calling Card</td>
</tr>
<tr>
<td>Conference Bridge</td>
</tr>
<tr>
<td>Video Conference</td>
</tr>
<tr>
<td>Webcast</td>
</tr>
<tr>
<td>Analog Line</td>
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</tbody>
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<table>
<thead>
<tr>
<th>PBX</th>
</tr>
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<tbody>
<tr>
<td>Centrex</td>
</tr>
<tr>
<td>IVR</td>
</tr>
<tr>
<td>ACD</td>
</tr>
<tr>
<td>Satellite</td>
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</tbody>
</table>

### Network

<table>
<thead>
<tr>
<th>Network Engineering/Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network Performance Testing/Tuning</td>
</tr>
<tr>
<td>Network Education</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Network Vulnerability Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Network Drop</td>
</tr>
<tr>
<td>LAN Admin</td>
</tr>
<tr>
<td>WAN Admin</td>
</tr>
<tr>
<td>Wireless Ntwk Admin</td>
</tr>
<tr>
<td>Firewalls</td>
</tr>
<tr>
<td>Ntwk Authentication</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Internal Network Access Request</th>
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</thead>
<tbody>
<tr>
<td>External Network Access Request</td>
</tr>
<tr>
<td>Fileshare Request</td>
</tr>
</tbody>
</table>
# Sample Catalog

## Application Services
- Appl Environment Setup
- Database Services
- Appl Hosting
- Appl Admin
- Appl Monitoring
- Appl Perf Test/Tune
- Backup/Recovery
- Appl Access
- Appl Reports
- Appl Training

## Corporate Services
- Business Cards
- Corporate Charge Card
- Travel Services
- Expense Reimbursement
- Education
- Holiday/Special Event Planning
- Employee Recognition
- Community Service Projects

## Personnel Services
- Recruitment
- New Hire Setup
- Temp Employee Setup
- Immigration Package
- Benefits
- Time Reporting
- Vacation/Leave Requests
- Role Change
- Relocation Package
- Employee Exit

## Facilities Services
- Conference Rooms
- Kitchen/Break Rooms
- Refreshments/Food Services
- Printing/Copying
- Mail
- Space Planning
- New Office Setup
- Office Relocation
- Office Furniture/Accessories
- Office supplies
- Housekeeping
- Maintenance/Repairs
- Security
- Parking/Transportation
- Health/Safety
- Concierge Services

## Project Services
- Vendor Product Eval
- Vendor Management
- Contract Negotiation
- New Project Request
- Project Management
- Business Continuity Planning
The Service Catalog & SLA Relationship

• A formal agreement between the customer(s) and the IT service provider specifying service levels and the terms under which a service or a package of services is provided to the customer
• It describes deviations from the standard services, options and levels described in the Service Catalog
SLA Structures

Service Catalog

Default

Options

Targets

Levels

SLA

SLA

SLA

SLA

Cust. 1

Cust. 2

Cust. 3

Cust. 4

SLA 1

Cust. 2

Cust. 4

SLA 2

Cust. 5

Cust. 6

SLA 3

Cust. 7

Cust. 8
Automating SLA Relationships

- Incident
- Problem
- Change

- IT Service
- IT System
- Configuration Item

- SLA

- LOB
- Dept
- User

- Capacity
- Availability
- IT Service Continuity
- Finance
Management Information – Regular reports

• Regular Reports
  • Targets / achievements
  • Corporate / business planning
  • Threshold and alerts
  • Quality measures
  • External factors
Management Information

• Sample Metrics
  • Number of occasions when agreed service levels are not provided
  • Service level reports are produced on time, are distributed to the right people and are effective
  • Service reviews with customers are regular and constructive

• The elapsed time to follow up and resolve issues raised by customers, is reducing over time
• Shortfalls in service level management are reducing over time
• Possible improvements in SLM are implemented more quickly, over time
• Active and accurate interfaces with other SM functions are growing
Implement The Process

- Create Service Catalog
- Benchmark the current service performance
- Initial offering to the customer based on the default level of service using the known data
- Draft SLA’s, OLA’s, UC’s based initial feedback from customer, or known performance of service
- Document Service Level Targets/Statements
- Get agreement that either the default level of service meets the customer’s need, or requires a new Service Level Agreement
Service Level Management, the process
Challenges, yes there are a few…..

- Monitoring actual achievements
- Ensuring targets are achievable prior to agreement
- Inadequate supporting agreements
- IT based rather than business aligned
- SLAs not communicated
Metrics & Management Reports

- Number or percentage of services covered by SLAs
- Are underpinning contracts and OLAs in place for all SLAs?
- Regular review meetings and any service improvement programs
- How many service breaches?
- Are service breaches followed up effectively?
Summary
Benefit of SLM

- Serves as a foundation of chargeback and SLA reporting
- Increased service visibility
- Reduced operational costs
- Improved SLM process
Conclusion checklist for SLM

- Identify Services and Customers
- Identify current contracts and agreements
- Define current IT capabilities
- Produce a Service Catalog
- Define and Document Process
- Define SLA Structure
- Define Reporting and Review Procedures
- Implement Pilot SLA
- Publicize the existence of SLAs
- Rollout remaining SLAs
- Analyze, Report, Review
Questions