Progress iteratively
An ITIL® Guiding Principle
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Introduction

My name is Virginia Araujo. I work as a Professor at the Atlantic University in Portugal. I am an accredited ITIL Expert, trainer and consultant, as well as being a COBIT and ISO/IEC 20000 Consultant Manager, and a PMI-PMP and PRINCE2® Practitioner with more than 20 years of professional experience in Technology and Information Systems. I have managed several large-scale projects in private and public enterprises.

Between April 2004 and September 2014, I worked for a large Portuguese conglomerate as a team manager and project manager. This multinational company, which has a presence in more than 60 countries, has a diversified portfolio of businesses that span retail, technology, financial services, and telecommunications.

1.1 DESCRIBE THE WORK YOU AND YOUR TEAM DID AT THE COMPANY

When I joined the company in 2004, I was the team manager of ten systems administrators and several external consultants who supported a distributed IT network across different countries and data centres.

I worked to influence the adoption of solutions architectures and server technologies, such as cloud, and to shape the policies that defined IT services.

1.2 WHAT BUSINESS CHALLENGES DID THE COMPANY FACE?

The company considered internationalization and a restructure of its businesses as key factors in its growth strategy. They had plans for new markets (such as Africa and the Middle East), as well as established territories (such as Spain), and were pursuing new business models, including franchise operations, and mergers and acquisitions.

However, accomplishing that growth was contingent on managing an increased level of complexity in the IT landscape, with challenges such as the accommodation of new currencies, languages, legal and fiscal compliance, supply chains, and accounting rules (to name a few).

1.3 WHAT TECHNOLOGICAL CHALLENGES DID YOU AND YOUR TEAM FACE?

The IT department had been in a period of transition over a number of years. The company decided to in-source several IT activities and move away from the existing centralized enterprise Active Directory Domain service. We had to implement several IT systems from scratch and migrate users and data without impacting on business processes.

The increased complexity of the systems brought several problems:

- Customer satisfaction was low, and service reports displayed several red key performance indicators (KPIs).
- I had developed a centralized and automatic hardware and software inventory tool, which became our first configuration management system (CMS). Unfortunately, it would not integrate with the outdated ITSM tool we were using, which meant we could not effectively manage incidents, problems or changes.
- The existing service desk ticketing tool (which was not really used as an ITSM tool) had functional issues, and was without a knowledge base. To improve our IT services, we had to identify new ways of working and bring in adequate tools to support the necessary activities, so as to become more efficient, effective and responsive in supporting the changing needs of the business.
- It was necessary to define standards of work to control our resources, reduce the service faults, and meet the service level agreements (SLA) with our customers to increase their satisfaction.

At the time, as the team manager of the systems team, I was responsible for the management and oversight of several software and infrastructure projects involving the adoption of IS architecture and engineering processes. I recommended and managed the adoption of some ITIL processes, along with other methodologies for project management.
2 Adopting and adapting ITIL

2.1 WAS ITIL ALREADY ADOPTED IN THE ORGANIZATION WHEN YOU JOINED?
No.

2.2 WHICH PROCESSES DID YOU ADOPT FIRST? WHY?
We needed to identify what was causing the high number of incidents. We began by redefining Service Desk activities and responsibilities, separating incident management from request fulfilment, and passing problem management onto second line technical teams. Next, we formalized the service asset and configuration management process in the systems team, since they were already responsible for the existing configuration management system that we had developed in-house.

2.3 WHICH PROCESSES DIDN’T WORK FOR YOU? WHY?
The problem management process did not succeed. This was predominantly because there was little or no existing control of problem management through effective metrics (CSFs and KPIs), and also no existing relationship between incidents and problems. The lack of commitment to problem solving, the lack of a process owner with the necessary authority, and the limitations of the ITSM tool, were further reasons for the failure.

2.4 WHAT PROCESSES DID YOU ADAPT TO SUIT YOUR CIRCUMSTANCES?
We had to adapt the incident management process to ensure the mapping between incidents and problems worked smoothly. We also had to redefine the service asset and configuration management process to improve the performance of incident and problem management, which led to improved customer satisfaction.

2.5 WHAT WERE THE BIGGEST CHALLENGES IN ADOPTING ITIL?
Engaging everyone and institutionalizing the change within the organization.

2.6 WHAT WENT RIGHT?
The delivery of ITIL training was included in HR programmes. Every new collaborator received ITIL Foundation training as a priority. For more effective sharing of knowledge and the training of new employees, I became an internal ITIL trainer.

2.7 WHAT WOULD YOU HAVE DONE DIFFERENTLY?
The organization should have invested more in training and in the achievement of knowledge before choosing their ITSM tool.

2.8 WHAT OTHER SOLUTIONS DID YOU CONSIDER?

2.9 WHICH DID YOU ADOPT, BESIDE ITIL?
Kaizen, ISO/IEC 9001, ISO/IEC27001, PMBOK.

2.10 WHAT ACHIEVEMENTS ARE YOU MOST PROUD OF?
There were two things:

- the first CMS, developed in-house, with which we began the implementation of an effective service asset and configuration management process; and
- the operationalization of the problem management process, regardless of the limitations in the existing ITSM tool and the non-existence of decision-level process ownership.
3 Guiding principles

3.1 HOW DOES THE GUIDING PRINCIPLE, PROGRESS ITERATIVELY, HELP YOU?
CAN YOU GIVE AN EXAMPLE?

Internationalizing a large company of 40,000 employees in order to get ourselves ready to expand into other countries is tricky.

We designed a roadmap of several projects through which we could achieve the overall objective. We identified small activities that could be implemented quickly but which would provide great value for the business (quick wins) and also created a document with the principles of internationalization for all new adoptions.

3.2 WHICH OTHER GUIDING PRINCIPLES DO YOU FIND USEFUL?

Many of the guiding principles were useful:

- **Be transparent**  The project was initially presented by top management to the whole organization.
- **Collaborate, Work holistically**  In the design phase, we conducted several workshops and meetings with business teams and technical teams to define the scope and align their requirements.
- **Focus on value**  The primary result was the identification of key business processes for internationalization with regard to the selected countries and the identification of 270 information systems where we would have to make changes.
- **Observe directly**  In the first phase of the project, we needed to go to sites in other countries where the languages and currencies differed from Portuguese, to identify the appropriate requirements.
- **Design for experience**  We concluded that it was much more expensive to hire staff who spoke English, which led us to translate the user interfaces of the systems into the local language.
- **Start where you are**  We wanted to centralize support with the purpose of reusing all existing resources and processes.
- **Keep it simple**  We evaluated the cost benefit of making the necessary changes in back-office applications so that the centralized Service Desk could provide remote support without having to know the local language.
- **Be Transparent, Focus on Value, Progress iteratively**  The programme’s steering group is continually involved with monthly reports and meetings, as well as with the employees and technical teams of the implementations.

4 What are your recommended Best Practices?

4.1 TOP FIVE ITIL SHOULD DO’S

- Begin with the benefits to the business in mind. Define what you want to achieve and measure the results to assess whether the targets were met.
- Ensure you have strong sponsors who will authorize change, and assign clear roles and responsibilities for everyone from the CIO to the technical analyst.
- Continually improve in short steps. Communicate each achievement to encourage involvement and engagement from stakeholders.
- Empower process owners and use CSI.
- Deliver training and share knowledge from the beginning.

4.2 TOP FIVE ITIL DON’T DO’S

- Don't wait for a big decision to start making improvements. There is much that can be done without completely disrupting everything with major changes. Evolve step by step.
- Don’t impose the process if the benefits are not clear. In that case you have a problem to solve; you need to improve the process.
- Don’t over-complicate or bureaucratize processes. Make sure each process is simple and easy to follow, otherwise people will avoid them.
- Don’t choose an ITSM tool without knowing what is possible in the context of your organization.
- Don’t exclude ITIL from your strategic plans.
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AXELOS is a joint venture company co-owned by the UK Government's Cabinet Office and Capita plc. It is responsible for developing, enhancing and promoting a number of best practice methodologies used globally by professionals working primarily in project, programme and portfolio management, IT service management and cyber resilience.

The methodologies, including ITIL®, PRINCE2®, MSP® and the new collection of cyber resilience best practice products, RESILIA™, are adopted in more than 150 countries to improve employees' skills, knowledge and competence in order to make both individuals and organizations work more effectively.

In addition to globally recognized qualifications, AXELOS equips professionals with a wide range of content, templates and toolkits through the CPD aligned AXELOS Membership and our online community of practitioners and experts.

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