A Practical Approach To Service Catalog Management

Building the Service Catalog

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You and I are going to open a restaurant in the Pittsburgh, PA area. We want to stand out among other restaurants, so we aren’t going to have a menu. Customers can order anything they want!

What are your concerns?

What do your customers expect?
Concerns

- May not have the right ingredients
- Expensive to keep or lose inventory
- Knowing how to make everything people order
- May not have the right equipment
- Don’t know what to charge
- May take a long time to cook
Customer Expectations

- Just the way they had it before
- In a realistic time frame – like at other restaurants
- Reasonable pricing
Getting Back to I.T. …

What does running a restaurant have to do with IT services?
Getting Back to I.T. …

- May not have the right equipment
- May not have the expertise necessary
- Need to design and develop it
- Customers expect to have everything - now and for free!
Why a Service Catalog?

- *The Service Catalog supports the sale or delivery of services*
- Creating a Service Catalog goes beyond the catalog itself...
- Helps IT teams focus on *Services* versus *Silos*
- Lays the groundwork for other processes such as Service Level Management and Request Fulfillment
Why a Service Catalog?

- Can lower the cost of delivering a service
- Supports processes such as Incident Management and Problem Management
- Frees Service Desk to handle more complex or business-critical issues
- Should be built into Project Methodology
Success Factors

- Clear goals – this drives how you start your efforts
- Executive Sponsorship – Accountability matters!
- Service Catalog Policy-High level plan
- Service Catalog Committee (representation from across IT) – ensures governance and continual improvement
- Understanding or roles and responsibilities (RACI)
Success Factors

- Strong Communication-always!
- Approval process-achieves quality and consistency.
- Templates-makes consistency easier!
- Understood value-by all stakeholders.
- Realistic timeline-proof of concept, phased approach.
- Continual Service Improvement efforts-in every aspect.
Building the Service Catalog

**Plan**
- Goals
- Define Services
- WIIFM?
- 4 P’s
- Discovery
- Evaluate
- Requirements
- Approach

**Do**
- Committee
- Develop Policy
- Develop templates
- Approval Process
- SC Entries
- Make Available

**Check**
- Assess Feedback
- Trending
- Measure Results
- Measure usage
- Communicate Value

**Act**
- CSI
- Update templates
- Tweak process
- Involve more people/groups
- Expand scope
- Add more functionality
Service Catalog Committee

- Establish a Service Catalog Committee first
  - Key to successful implementation of Service Catalog Management

- Upfront Tasks:
  - Identify Goals and overall plan
  - Define the Policy
  - Define Roles and RACIs
  - Provide Governance; makes decisions
  - Define Project scope, schedule

- Ongoing maintenance, guidance, decision making and continuous improvement
Who is on the Committee?

- The CIO should be a member with representation from across I.T.
  - If CIO can’t attend meetings – should be update regularly or attended quarterly meetings

- Possible members:
  - Service Catalog Manager, the Change Manager, the Service Support Center Manager, appointed committee members and the Service Owner and Service Coordinator of the services under discussion
Who is on the Committee?

Committee involves other roles from within IT who have predefined roles and responsibilities related to service catalog work.

- Roles could include:
  - Service Manager
  - Service Owner
  - Service Coordinator
  - Subject Matter Expert
  - Content Developer
  - Non-technical Reviewer
  - Technical Reviewer
  - Service Catalog Manager
**Plan**

**Goals**
- What are we trying to achieve, change, improve, or eliminate (Short, Medium, and long term – become drivers)?
- What is the value to each stakeholder group? (WIIFM – e.g. save time, make it easier, more accurate, less expensive, offload routine requests from SD etc.)

**Define Services**
- What is a Service? (will cover in next slides)
- Identify attributes, owners, dependencies, (details in handouts)
- What services will first appear in the catalog-phases? (based on your goals)

**Discovery**
- Define functional and business requirements (based on goals).
- What do we already have? (explore all current documentation, sites, etc.)
- Evaluate public Service Catalogs, assess, decide. (list in handouts)

**Approach**
- Where will we start? How many entries at first? (ties back to goals)
- Who is the audience? Who needs to be involved?
- What technology will we use? Who is doing what? (4 Ps)
Defining Goals

- It is essential to define goals up front; they drive all next steps.
- The steps in this session are important if your goal is to:
  - Lay the foundation for implementing ITIL processes
  - Ultimately fulfill requests and provide a level of self-help through the catalog
  - Include all IT services and even those outside of IT
Defining Goals

- If your goal is to “just get something out there” you can:
  - Take fewer steps; assign an owner, define scope of services, create a template, identify a tool, document and post! However, be realistic about the results. They will be limited and short term.
  - Accomplish this with the Service Desk alone (and maybe the Service Management tool).
Laying the Groundwork: Defining a Service

- A service:
  - Fulfills one or more needs of the customer
  - Supports the customer’s business objectives
  - Is perceived by the customer as a coherent whole or consumable product

“*A good starting point is often to ask customers which IT services they use and how those services map onto and support their business processes.*” (Source ITIL v3 Service Design book)
Defining a Service

Identify Services (group effort)
- Define Major business processes
- Define enabling IT services
- Map IT systems to IT Services
- Map IT components to IT systems

Get more Detailed:
- Define Service Attributes (list in handouts)
- Create a Service Map (example on next slide)

Additional Outputs:
- List of services and service owners, both business and IT (foundation for SLAs)
- List of all IT-dependent service owners
- List of existing information sources
**Discovery**

- Collect requirements from the business
- Develop rating scale for evaluation
- Evaluate existing Service Catalogs/rate them.
- Determine Service Catalog platform
  - Features for future direction
  - Easy to use/maintain
  - Integration with other tools
- Look at current information sources

**Approach**

- Finalize the Plan (4 Ps)
  - What services first? What platform (Features for future direction; Easy to use/maintain) -look and feel, etc.
- Communication
- Documentation
- WIIFM? – promotion
- Training
How should it look? An example…
How should it look? An example....
Sample Catalog Entry Fields

<table>
<thead>
<tr>
<th>Service</th>
<th>Contact</th>
<th>Service Definition</th>
<th>Base Level Services</th>
<th>Services NOT included</th>
<th>Service availability</th>
<th>Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone &amp; Voicemail</td>
<td>Jason Ward</td>
<td>Provision of standard telephone services</td>
<td>• Installation • Support • Voicemail services • Analog phone setup • Virtual phone setup</td>
<td>• Employee usage reporting • Tracking and reporting on usage • Remote / calling card services</td>
<td>24x7x365 for registered IT Customers</td>
<td>As detailed in SLA</td>
</tr>
</tbody>
</table>

Additional samples in online handout.
Source: http://ebookbrowse.com/example-copy-of-ets-service-catalog-template-xls-d49778868
Committee
- Initiate all aspects of the process
- Oversee progress and implementation (Unless delegates as project)
- Define Roles, Document RACIs
- Ongoing tasks and decisions

Policy
- Documented guidelines (example on upcoming slide)
- What services will be listed?
- Who does what?
- How will it all work?

Process
- Maintain single source of information on services
- Steps for: Submission, Review, Approval, Maintenance, Project deliverable
- Templates, communication, training, documentation
- Accountability,

Implement
- Project timeline (Pilot, go live, phases, etc.)
- Deliverables
- Training, communication
- Litmus test
Committee Defines Roles

A Sample…

**Service Catalog Manager**

- A Responsible for producing the Service Catalog.
- Makes sure all services are documented in the Service Catalog.
- Ensures information is accurate and updated.
- Keeps information consistent with the Service Portfolio.
- Makes sure information is protected and is backed up
  (note – the Service Level Manager helps, but the Service Catalog Manager is responsible)
<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible</th>
<th>Accountable</th>
<th>Consulted</th>
<th>Informed</th>
<th>Change Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry topic approved</td>
<td>R</td>
<td>A</td>
<td>C</td>
<td>I</td>
<td>I</td>
</tr>
<tr>
<td>Author writes entry and sends to Service Catalog Manager</td>
<td></td>
<td>A</td>
<td>R</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Technical Reviewer does review for accuracy</td>
<td>A</td>
<td>C</td>
<td>I</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>Non-Technical Reviewer reviews document against rubric, makes edits and suggestions</td>
<td>A</td>
<td>I</td>
<td>R</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author makes revisions according to edits and suggestions</td>
<td>A</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Arlington Public Schools RACI complete RACI in handouts
<table>
<thead>
<tr>
<th>Process activities</th>
<th>(Procedure number)</th>
<th>Process Owner (MM)</th>
<th>Data Analyst (GB)</th>
<th>Server Support (KK)</th>
<th>Service Level Managers</th>
<th>CTR Division Directors</th>
<th>CTR Desk/Tele Support</th>
<th>CTR Training</th>
<th>Service's Team Members</th>
<th>Agreement Team Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>48 Service Catalog Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>49 PROCESS LEVEL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50 Prepare and distribute monthly reports</td>
<td>SCM-PL-001</td>
<td>A,R</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>51 Update procedures in SDP</td>
<td>SCM-PL-002</td>
<td>A,R</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>52 Establish Service Catalog Process metrics</td>
<td>SCM-PL-003</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>54 SERVICES REPOSITORY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55 Modify the master service form in InfoPath</td>
<td>SCM-SR-001</td>
<td>C</td>
<td>A,R</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>56 Update the service form as required</td>
<td>SCM-SR-002</td>
<td>C</td>
<td>R</td>
<td></td>
<td>A,R</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57 Approve services in InfoPath</td>
<td>SCM-SR-003</td>
<td>A,R</td>
<td>C</td>
<td>I</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59 LIVE CATALOG</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60 Send XML dump to DECA every Friday</td>
<td>SCM-LC-001</td>
<td>R,I</td>
<td>A,R</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61 Approve staging version for live update</td>
<td>SCM-LC-002</td>
<td>A,R</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Source NIH
Sample of Details in the Policy:

- Senior management and their staff are committed to inform the Service Catalog Manager of observed or reported inaccuracies in the service catalog.

- All changes to the service catalog including updates must follow the Service Catalog Maintenance Process, be approved by the Service Catalog Committee and meet the requirements of the service catalog policy.
Sample of Details in the Policy:

- All entries in the service catalog will be audited and updated quarterly. The review will be overseen by the Service Catalog Manager, and conducted by the Service Owner.

- The service catalog will be published under the direction of the Service Catalog Committee.

- All services listed in the service catalog will have the following details:

- All services listed in the service catalog will have one of the following status codes assigned to it: Chartered, Operational...
<table>
<thead>
<tr>
<th>Submitting New Entries:</th>
<th>Who are the Authors?</th>
</tr>
</thead>
<tbody>
<tr>
<td>◆ Entry topic approved</td>
<td>◆ Authors are Subject Matter Experts</td>
</tr>
<tr>
<td>◆ Author writes entry</td>
<td>◆ Technical Reviewers are Service Owners, Managers, or SME’s</td>
</tr>
<tr>
<td>◆ Technical Reviewer reviews for accuracy</td>
<td>◆ Non-Technical Reviewers have “perspective” and a writing background</td>
</tr>
<tr>
<td>◆ Non-Technical Reviewer reviews for understandability, helpfulness, and utility</td>
<td></td>
</tr>
<tr>
<td>◆ Author makes revisions</td>
<td></td>
</tr>
<tr>
<td>◆ Entry published in Catalog</td>
<td></td>
</tr>
</tbody>
</table>
## Plan Communication

- **Item (what needs to be communicated)**
- **What to communicate**
- **Who communicates?**
- **To Whom?**
- **How?**
- **When?**
- **How often?**
- **Comments (assess effectiveness)**

Communication plan sample in handouts.
Check

Assess Feedback
- Build feedback mechanisms into Plan and pilot; use on ongoing basis
  - On entry itself
  - Surveys, interviews, user groups, follow up, reports etc.
  - Learn overall feelings, ease of use, productivity impacts, etc.

Measure
- Customer Satisfaction
- Usage
- Impact on Service Desk and key processes
- Tie back to goals and value to business and IT

Trend
- What did we learn (both for customer and IT – correlations between results)?
- Trending in all areas of measures. What happened? (e.g. slow to start, increased usage, increased/decreased productivity?)
- What next. Drives expansion in functionality and entries.
Customer Feedback

- Was it easy to use?
- Why did/didn’t you use it?
- What else would you like to see in the Catalog?
- How did it help you in your job? (e.g. - saved time, more convenient)

IT Feedback

- How did the Technical View of the catalog help you in your job?
- Did you direct them to the Catalog?
- Any calls about how to use the Service Catalog or about adding more services to the catalog?
Act

CSI
- Identify improvements and implement them (to process, catalog, etc.)
- Continual feedback/communication
- Update templates
- Foster organizational culture change - adoption

Process
- How IT can use the Catalog to improve in various process areas?
- How can we to use the change process to facilitate the Service Catalog Management process?
- How can we facilitate improvements to business processes?

Expansion
- More entries
- More groups
- Increased functionality
- Integration with other tools
Expansion across organization

- Include more groups – both within IT and within business
- Repeat steps: Gather requirements, understand WIIFM, let goals drive plan

Functionality Expansion

- Communication Mechanism
  - Updates, new services, outages, status
- Self Help
  - Procurement, standard changes, requests, status checks
What is the Practical Approach?

- Take what you learned today and assess what you already have in place in your organization.

Success comes from:

- Clearly defining goals and allowing them to drive decisions
  - Short, medium, long term
  - Realistic
- Distributing workload so that it is manageable
- Not recreating the wheel – use existing resources in the industry!
- Taking manageable steps (phases and functionality – goals)
- Clear, effective communication
- True management of the process
- Once the process is refined and the tool is understood and leveraged, expansion becomes possible and relatively painless!
Wrap Up

- **Really invest time in planning**
  - Initial work on policy and process documentation pays off
  - Once the process is agreed upon and refined, progress and success become easier

- **It’s all about the goals!**
  - Have to be defined and truly supported
  - Everything goes back to success in reaching the goals (value, quality, satisfaction, productivity, improvement, etc.)

- Additional information in session handout (online)