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From ISO/IEC20000 to Continual Service Improvement; we have the experience to guide you to meet your ambitions.

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Resources



Topic: Practical Service Management

BrightOak Consultancy Resources

At BrightOak Consultancy we are committed to supporting the wider I.T. Service Management community. To this end we are heavily involved with the industry bodies; regularly present at conferences and events; author white papers, books and articles; and we produce these resources which are freely available through our website.

Topic: Practical Service Management

Resources in this series cover tips and real experience of service management issues.

Other topics include:

- Service Management Theory
- Governance
- Benefits Realisation Management

Adding Value Through Internal Reviews

There's more to Service Management Internal Reviews than just getting ready for an external audit. Done right, they can create a lot of value for the business; establishing an improvement culture and helping the business remain agile. Here we will highlight the benefits of the right approach and some of the value that can be added.

Internal reviews are required by the ISO/IEC20000 standard but they are not audits. They are valuable tools for assessing the current state and can be equally valuable as a way of supporting process owners. By removing the element of passing or failing, they can be welcomed as open discussions about strengths and weaknesses and an honest assessment of progress can be made or potential remedial action planned. In this way they can drive improvements and efficiency.

There are other benefits too. By having the review performed internally, there are some cost-savings relative to having the program performed by an external consultant. But in addition,

the timings can be more flexible and resource commitments can be managed.

Cross-fertilization will build internal experience and knowledge. It's an opportunity to share best practice with peers and receive 'consultancy' advice from internal experts or mentors. They can even become part of a personnel development process, enabling coaching on a one-to-one basis.

Service Management goals must be aligned with corporate strategy. As business priorities change, so must the demands on the supporting services. Regular reviews allow Service Management to respond quickly and adapt, whilst also ensuring that its' profile within the organisation is maintained.

So the question remains; how can all this be achieved? Well, before even starting out, a 'review culture' needs to be established. This means that everyone involved is aware of and bought into the concept of a review being part of the improvement process, not an end in itself. Without this, any review may become adversarial or at least defensive.

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Different Angles

Internal Reviews cannot concentrate on everything in one hit, therefore they need to be targeted on those things most important to the business or causing the most pain. This may be something like a faulty process, a particularly high-profile service or a team undergoing significant change.

Using 'Different Angles' is about examining the delivery of services;

By process

This angle examines the effectiveness of a process in supporting the delivery of all services. It would involve looking at the detailed mechanics of the process and hand-offs to other processes.

By service

This angle looks at how effectively all processes address the specific needs of a service in delivering value to the customer.

By operational team

This angle deals with how well the processes are enacted within the operational teams. This could relate to an examination of a single process supporting all services, or all the processes used by that team.



“Service Management goals must be aligned with corporate strategy. As business priorities change, so must the demands on the supporting services.”

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In preparing for the review, there are things which must be done. Some are more obvious than others.

- ➔ All the roles and skills of the review team need to be defined.
- ➔ The corporate strategy and objectives should be clearly understood.
- ➔ All the documentation should be read thoroughly.
- ➔ Determine the scope and intent of the review. See 'Different Angles', 'Different Perspectives' and 'Different Approaches'.
- ➔ The 'lines of enquiry' need to be formulated. Rather than designing a predetermined list of questions, it can be much more productive to think in terms of a series of topics that the discussion must cover.

Internal Reviews should not feel rushed or stressful so it needs to be ensured that everyone has allowed enough space and time to get the most out of it. Structure helps with this but that doesn't mean it must be formal. The person leading the review sets this tone but as it is a two way conversation, it needs to flow in a natural way.

A key thing is to look for ways of ensuring the purpose is clearly understood, not just the mechanics. Looking at how 'hard' (must be followed) and 'soft' (some flexibility) organizational

rules are handled, will give some indication of this.

It is essential is to verify DUCRI (that is that things are Documented, Used, Communicated, Reviewed and Improved) but it's also important to remember that this isn't an audit or a box ticking exercise; don't be the methodology police.

This is another reason why it's useful to think in terms of wider topics, such as in the list below.

- ➔ People (who are the players)
- ➔ Purpose
- ➔ Status
- ➔ Progress
- ➔ Issues
- ➔ Benefits
- ➔ Risks
- ➔ Improvements
- ➔ Resources
- ➔ Metrics

“.. establishing an improvement culture and helping the business remain agile.”

can be covered by asking the questions of different

The questioning style need not be too rigid ... but a review is about getting at the answers. These topics are therefore the starting points of a conversation that also give some structure to the proceedings, but the reviewer should be prepared to follow where the answers lead. The topics should always be covered considering the context of the review but the same things



“..don't be the methodology police”

people, in different ways or from a different perspective, in order to get other results.

After the review, as with an audit, it is essential to have a feedback mechanism that fits the purpose of the review.

Everything then needs to be documented;

- ➔ Considering the different audiences (management, practitioners, customers)
- ➔ Including the progress, highlights, benefits, good news
- ➔ ... as well as the risks, issues, non-conformances and bad news
- ➔ Remedial actions and timescales form the basis of any improvement plans.
- ➔ Meaningful metrics can be produced.

It is important to set the results in a wider context. A maturity model can be used to plot high level progress and a comparison made with benchmarks.

Finally comes the planning for the next review. Hopefully, much was learned through the review process to help guide future reviews. A mechanism for feedback can help with this, as can introducing an 'end of review' review. It becomes a continuous improvement activity whilst itself being continually improved.

Different Approaches

This is more of a practical decision, than the 'Different Angles' or 'Different Perspectives'. It's about how the review sessions will be conducted and is dependent on how the review cycle reflects business priorities.

Timing

Reviews could be pre-announced and timetabled in such a way that the organization can plan for them. Alternatively, they could be unannounced, a 'surprise

-attack' giving no chance for rehearsed answers. Whatever the timing, it should fit the business need—with frequency matched to risk and business context.

Style

A 'hard' approach might consider processes as something to be strictly followed, whilst a 'soft' approach might allow minor localized variations as long as the process constraints were being met.

Different Perspectives

In an organisation, stakeholders have different priorities which Service Management has to address. In order to establish how well ITSM is performing, a review can take account of 'Different Perspectives'.

Management have a global overview without much attention to the details of individual processes or services. Looking from their perspective, examine how closely aligned the ITSM deliverables to the strategic aims of the business.

Practitioners have a good focused view of their process or service but less awareness of peripheral ones. Look from their perspective at the mechanics of the processes and how the services are delivering.

Customers and Users are mainly concerned with the performance of those services which affect their business activities. From their perspective look at whether the service is delivering value.