Collaborate

An ITIL® Guiding Principle

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1   Introduction

My name is Kevin Toone. I work as the Customer Services Manager for the Information Technology and Media Services department (ITMS) at De Montfort University (DMU) in Leicester, England.

De Montfort University consists of:

- four faculties,
- a number of professional services departments,
- approximately 2,800 staff,
- 23,000 students.

ITMS was formed in 2011 following a restructure which brought together the central IT department (ISAS) and the previously devolved faculty-based IT teams. With a staff of approximately 150 people, we are responsible for all IT in the organization including:

- Service desk
- Networking
- Server infrastructure
- Business systems
- Desktop support.

I am responsible for the:

- ITMS Service Desk,
- IT Training team,
- ITIL processes:
  - Incident Management
  - Change Management
  - Reporting.

My other roles include P1 Incident Manager and Change Manager.

When I joined ISAS in 1998 as Testing Team Leader, ITIL was not already adopted. After switching jobs to become User Support Manager (managing the Service Desk and desktop support teams), I switched my focus to service management.

I came across ITIL in 2004 and took the V2 Foundation in 2005 in order to gain a greater understanding of what ITIL was about. At the time, when I suggested adopting ITIL, there wasn't the appropriate understanding or will to adopt it among our senior managers.

Since then, we have had a big change at senior management level. The current senior managers are more IT service management-centric and, as such, are advocates of ITIL.

I have since gained the V2-V3 Foundation Bridge and Service Operation lifecycle certificates, but I am always asking for more.

2   Adopting and adapting ITIL

The main business challenges of adopting and adapting ITIL were:

- The culture within ITMS. The department had been created in 2011 when a number of different departments were merged. This brought together several different attitudes, approaches and varied ways of working. This resulted in inconsistent service.

- The culture within DMU needed to change in order to ensure the processes that were put in place would be followed. For example, we needed to begin using the service desk as a single point of contact for logging incidents and service requests, rather than going to the senior manager in ITMS to get a job done.

The cultural changes led to some pushback over a period of a couple of years. However, as the staff came to understand the ways of service management and realized the benefits of ITIL, the service improved.

From a technical standpoint, the ITMS toolset which had been set up prior to the restructure was creaking and needed to be replaced.

A major transformational project in the department was launched, which provided:

- Adoption of an updated toolset and relevant reporting

- Incident management training for staff involved in incident management

- Introduction of service level agreements (SLAs), which was a new concept within the organization. These were developed with customer requirements in mind. For example, a priority of P1T was introduced to provide immediate support for lecture theatre audio and visual facilities

- ITIL V3 Foundation training and certification for 100 staff.

There was an effective collaboration between:

- ITMS stakeholders

- Users

- System suppliers.

The output from which helped to develop a new ITMS toolset.

Incident management was the first process we adopted, as it was 'bread and butter' work for the department and was where the majority of interactions were with our customers.

In addition to a full-blown incident management process, we worked on the following:

- **Quick Logging**. We have adapted incident management in areas where there are customer-facing counters which carry out quick repetitive work, such as the library counter service and multimedia services. These are counters where we do not need to collect information beyond the need to measure request volumes, and where it would take longer to log the request than to fulfil it.

- **Self Help Guides**. We have developed a series of self-help guides to aid our customers.

We put in place an Excel/Word-based change management process, which has:

- reduced the amount of unauthorized change,

- provided more visibility of changes,

- reduced the number of incidents occurring due to inadequate change planning,

- helped to introduce a more change-aware culture.

This process is being reviewed and will be further developed within the toolset; we held workshops with the relevant stakeholders to understand their requirements regarding the toolset.

Problem management is currently carried out on P1 (priority one) incidents. The nature of it means this is better served as a Word-based log.

Future toolset developments will include problem management, release management and configuration management.

I am proud of the progress we have made over recent years within the department. It is not perfect but, compared to our previous situation, it is a vast improvement.

3   Continual service improvement

The main challenge with continual service improvement (CSI) is to persuade teams of its importance. Comments such as 'we're too busy' demonstrate that it is tricky to find the balance between business as usual (BAU) and the initiation of improvements.

However, some CSI is currently underway, including:

- A customer survey, triggered on closure of all incidents and requests, whose feedback is assessed for further improvement.
- A complaint system, which brings structure to the way we manage complaints.
- Monthly reports are discussed at the ITMS Management meeting. Managers discuss their teams' performance for that month.
- Monthly reports are presented to managers, who then present them to their teams.
- Monthly reports are presented to the customer at review meetings.
- Each of my teams are asked to provide a tangible improvement idea per month.

4   Guiding principles

The collaborate principle is about talking to relevant stakeholders and defining and agreeing ways forward. For us, these stakeholders include:

- Customers
- Suppliers/vendors
- Internal ITMS teams
- University senior management.

Collaborating with these stakeholders allows us to:

- identify and agree requirements,
- work as partners with the business instead being of a 'siloed' department that other departments are reluctant to deal with,
- produce processes that are agreed and workable within ITMS, therefore reducing resistance to change and/or new processes,
- define expectations with customers and within ITMS to set benchmarks, service levels and targets,
- deliver agreed results.

Collaboration also helps us to define where we want to be and to identify areas for improvement and possible reuse. Through this collaboration, our service has improved as has our reputation within the organization.

Examples of these improvements include:

- Our monthly reports. Through collaboration with various stakeholders, we have modified an existing report to provide more pertinent information. These reports are then re-used, in a cut-down format, for management summary reports.
- The introduction of the P1T priority to provide improved support to student-facing lecturers.
- Introduction of relevant service levels to measure performance.

Collaboration with stakeholders has helped to:

- introduce SLAs,
- generate relevant ideas,
- provide information for management reports,
- streamline our processes.

Allied with the collaboration guiding principle, the start where you are principle gives us a good baseline of where we are. This, in turn, helps define where we want to be, which, by extension, assists us to identify areas for improvement and possible re-use.

I find I use aspects of all the guiding principles. Indeed, much of it is common sense.

5   What are your recommended Best Practices?

5.1 TOP FIVE ITIL SHOULD DO'S

- Collaborate with teams and, where appropriate, adapt processes to make them workable in your environment.
- Provide staff training to spread understanding of ITIL.
- Gain buy-in from managers at all levels.
- Provide evidence such as SLAs / reporting to illustrate how the service is improving.
- Use a toolset to help manage your processes.

5.2 TOP FIVE ITIL DON'T DO'S

- Don't adopt ITIL and expect people to follow it without providing training.
- Don't try and adopt it without identifying the relevant responsibilities and allocating them to staff.
- Don't expect the culture to change immediately; it can be a big change for some staff to take in.
- Don't take an 'adopt and forget' approach. Processes need to be periodically reviewed for relevance, efficiency and improvements.
- Don't talk about ITIL solely in ITIL-speak if the audience doesn't warrant it. Make it relevant to the environment you are working in.

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