



## ITIL® QUALIFICATION SCHEME & ROLE-BASED TRAINING MATRIX WHITE PAPER

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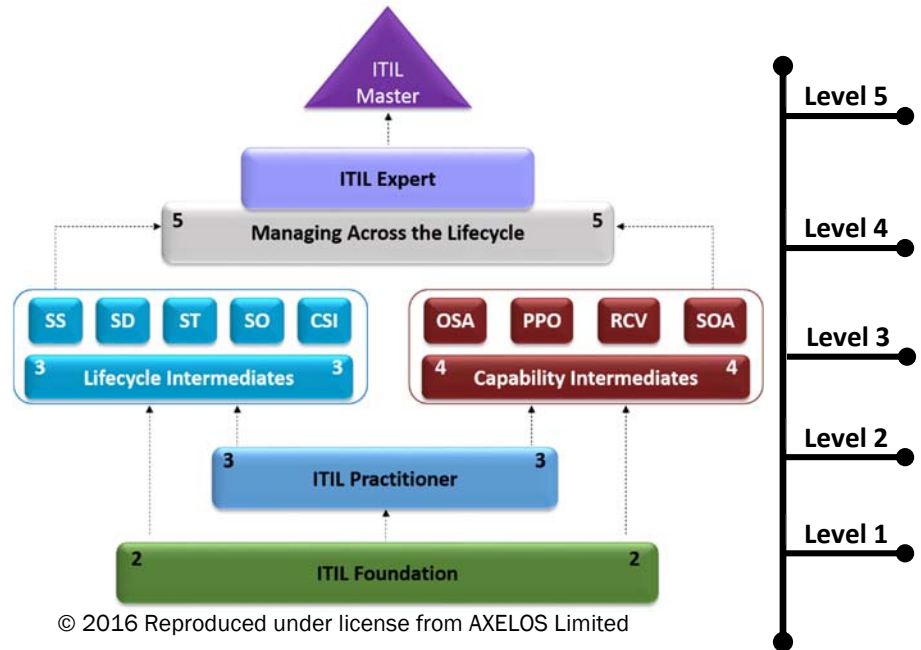
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## Overview – The ITIL Qualification Scheme

The ITIL Qualification Scheme<sup>1</sup> provides a modular approach to the ITIL framework. It is comprised of a series of qualifications focused on different aspects of ITIL Best Practice, to various degrees of depth and detail. The scheme supports 5 levels of certification, as detailed in this document. The 5 levels are shown here, in the inverse:

1. **Foundation Level**
2. **Practitioner Level**
3. **Intermediate Levels (or Streams)**
  - o Lifecycle
  - o Capability
4. **Expert Level**
5. **Master Level**



The ITIL Qualification Scheme is supported by a credit system. At each level of education, learners who successfully pass the associated certification exam will be awarded credits toward the highest level of certification in the IT Service Management (ITSM) industry today, the ITIL Expert.

Candidates holding a Foundation certificate (or an ITIL Foundation Bridge certificate) can accumulate credits from ITIL Practitioner and either of the Intermediate streams.

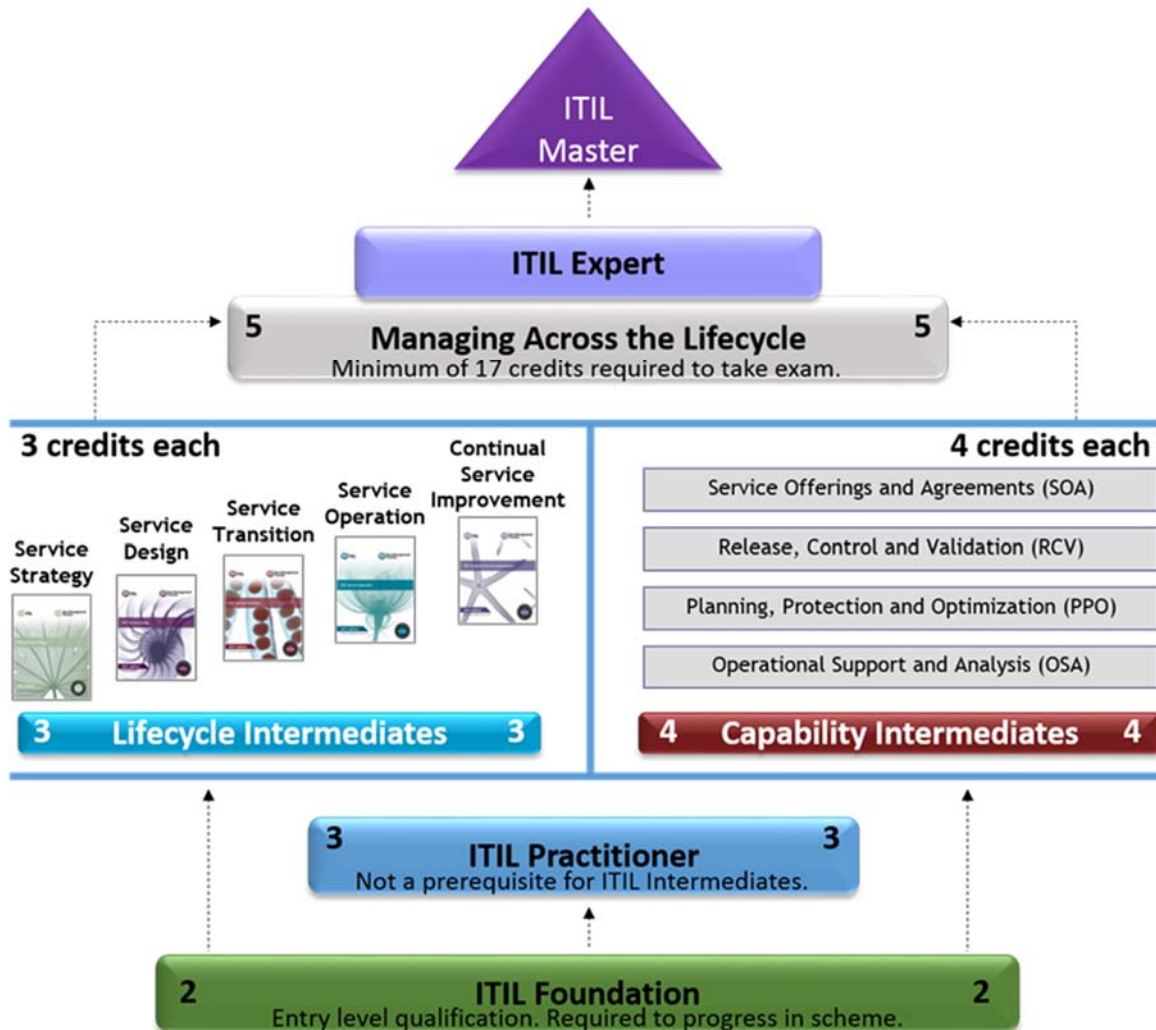
To become a certified ITIL Expert, candidates must accumulate a minimum of 17 credits to be eligible to sit for the mandatory **Managing Across the Lifecycle** (MALC) course. Upon successful completion of the MALC course and exam, the candidate earns 5 credits. Therefore, the minimum number of credits an ITIL Expert will hold is 22.

<sup>1</sup> The ITIL® Qualification Scheme official website: <https://www.axelos.com/qualifications/itil-qualifications>.

# ITIL QUALIFICATION SCHEME

## Path to ITIL Expert Certification

As stated above, to achieve the ITIL Expert certification, candidates must obtain a minimum of 22 credits, 2 of which must be from the **Foundation** module, which is a mandatory first step, and 5 of which must be from the **Managing Across the Lifecycle** (MALC) module, which is a mandatory final step.



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The diagram above provides further detail to the ITIL Qualification Scheme shown on Page 1 and depicts the ITIL core books that map to the ITIL Lifecycle courses.

See the [Recommended Reading Diagram](#) to learn which of the ITIL core books map to each ITIL Capability course.

## ITIL QUALIFICATION SCHEME

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### 1. Foundation Level

The Foundation level focuses on knowledge and comprehension to provide a good grounding in the key concepts, terminology and processes of ITIL. Upon successfully completing either the Foundation course (2011 edition) or the Foundation Bridge course (retired December 31, 2010), learners may proceed to the next level of certification.

### 2. Practitioner Level

The Practitioner level is the next stage in the ITIL scheme. It provides an optional step between Foundation and the Intermediate level and aims to improve the ability of individuals to adopt and adapt ITIL in their organizations. *This course is not a pre-requisite for Intermediate level courses.*

### 3. Intermediate Level

The 2 streams of the Intermediate level, **Service Capability** and **Service Lifecycle**, have caused confusion as to which course(s) are the most appropriate for a candidate to pursue. In a nutshell, the Capability courses focus on the execution of ITIL processes at the operational level and on the details of process activities, including specific methods and techniques. The Lifecycle courses focus on the contribution of these processes to the overall ITIL Service Lifecycle and are concerned with the management and control aspects of implementing the Lifecycle stage, rather than operational level details.

As a general rule, if candidates are operations and technical subject matter experts (SMEs) capable of developing and executing ITIL operational specific processes and procedures, the **Capability** stream is the better choice. Typically, these individuals will be Process Owners, Managers, Task Leads and process practitioners. They serve in functional roles operating, managing and supporting the infrastructure and IT services.

Each Capability course groups related processes and roles. This offers the learner a balanced knowledge of ITIL practices that have direct interaction and dependencies in their daily use.

The **Lifecycle** stream is aimed at individuals who require a detailed understanding of a given Lifecycle stage and how it can be implemented to enhance the quality of IT service provision within an organization. These individuals are most likely senior managers with a broad view of organizational requirements who can sponsor and support the development and installation of processes within the Lifecycle area.

The 4 **Service Capability** clustered modules are depicted on the next page. Each certification covers the end-to-end processes (at a detailed level) and the importance of the interdependence of processes within each grouping. Technology and implementation considerations relative to each process are also discussed.

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<p><b><u>Release, Control and Validation (RCV)</u></b></p> <ul style="list-style-type: none"> <li>• Change Management</li> <li>• Release And Deployment Management</li> <li>• Service Validation And Testing</li> <li>• Service Asset &amp; Configuration Management</li> <li>• Knowledge Management</li> <li>• Request Fulfillment</li> <li>• Service Evaluation</li> </ul> <p>ITIL Expert Credits: 4</p>	<p><b><u>Operational Support and Analysis (OSA)</u></b></p> <ul style="list-style-type: none"> <li>• Event Management</li> <li>• Incident Management</li> <li>• Request Fulfillment</li> <li>• Problem Management</li> <li>• Access Management</li> <li>• Service Operation Functions <ul style="list-style-type: none"> <li>○ Service Desk</li> <li>○ Technical Management</li> <li>○ IT Operations Management</li> <li>○ Application Management</li> </ul> </li> </ul> <p>ITIL Expert Credits: 4</p>
<p><b><u>Service Offerings and Agreement (SOA)</u></b></p> <ul style="list-style-type: none"> <li>• Service Portfolio Management</li> <li>• Service Level Management</li> <li>• Service Catalog Management</li> <li>• Demand Management</li> <li>• Supplier Management</li> <li>• Financial Management</li> </ul> <p>ITIL Expert Credits: 4</p>	<p><b><u>Planning, Protection and Optimization (PPO)</u></b></p> <ul style="list-style-type: none"> <li>• Capacity Management</li> <li>• Availability Management</li> <li>• IT Service Continuity Management</li> <li>• Information Security Management</li> <li>• Demand Management</li> <li>• Risk Management for Service Planning Protection and Optimization</li> </ul> <p>ITIL Expert Credits: 4</p>

The **Service Lifecycle** stream is focused on each stage of the ITIL Service Lifecycle. Each course covers the principles, processes (at a high level), functions and activities within a given stage. Technology and implementation considerations are also discussed. The 5 **Service Lifecycle** modules are:

Service Strategy	Service Design	Service Transition	Service Operation	Continual Service Improvement (CSI)
Demand Management	Service Catalog	Planning & Support	Event Management	7 Step Improvement Process
Strategy Generation	Service Level Management	Change Management	Incident Management	Service Reporting
Service Portfolio	Availability Management	Service Asset & Configuration	Problem Management	Service Measurement
IT Financial Management	Capacity Management	Release & Deployment	Access Management	Creating Return on Investment
	IT Service Continuity	Validation & Testing	Request Fulfillment	Service Level Management
	Information Security	Evaluation		Business Questions for Business
		Knowledge Management		
ITIL Expert Credits: 3				

Candidates can choose modules from the **Capability** (4 credits each) or **Lifecycle** (3 credits each) streams and when seeking the ITIL Expert are expected to choose a balanced program overall.

## ITIL QUALIFICATION SCHEME

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### 4. Expert Level

The **Managing Across the Lifecycle (MALC)** course is a free-standing qualification, but is also the final module of the Service Lifecycle and/or Service Capability streams, which lead to ITIL Expert.

The purpose of this qualification is give candidates the skills to support an organization's service delivery by bridging the service lifecycle stages. The qualification demonstrates that candidates have learned the value of one combined service management practice as opposed to separate subject areas. ITIL processes and practices, as learned in the lifecycle and capability streams of the Intermediate certificates, are put into a context of delivering this value.

<b>Managing Across the Lifecycle (MALC)</b>
ITIL Expert Credits: 5

### 5. Master Level

The ITIL Master qualification validates the capability of the candidate to apply the principles, methods and techniques from ITIL in the workplace. To achieve the ITIL Master qualification the candidate must be able to explain and justify how they selected and individually applied a range of knowledge, principles, methods and techniques from ITIL and supporting management techniques, to achieve desired business outcomes in one or more practical assignments.

To be eligible for the ITIL Master qualification, candidates must meet or fulfil the following entry criteria:

- Have reached the ITIL Expert level
- Have worked in IT Service Management for at least five years in leadership, managerial, or higher management advisory levels.

AXELOS, the official ITIL Accreditor, is working on a number of documents to support the qualification, and to provide further information to candidates. These documents will be made available soon.

**ITIL Intermediate Training Matrix Based on Role – Recommended Capability Courses**

Role	Recommended Capability Courses
Network Operations	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Desktop Support	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Data Center Management	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Server Support and Administration	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Change and Configuration Management	Release, Control and Validation (RCV)
Asset Management	Release, Control and Validation (RCV)
Development and Engineering	Release, Control and Validation (RCV) Planning, Protection and Optimization (PPO)
QA and Testing	Release, Control and Validation (RCV)
Service Desk Management	Operational Support and Analysis (OSA)
Security and Information Assurance	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Account /Service Management	Service Offerings and Agreement (SOA)
Financial Management	Service Offerings and Agreement (SOA)
Supplier Management	Service Offerings and Agreement (SOA)
Program and Project Management	Service Offerings and Agreement (SOA) Planning, Protection and Optimization (PPO)
Metrics and Measurement	Operational Support and Analysis (OSA) Service Offerings and Agreement (SOA)
Process and Procedure/Tech Writing	Release, Control and Validation (RCV) Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO)

**ITIL Intermediate Training Matrix Based on Role – Recommended Lifecycle Courses**

Role	Recommended Lifecycle Courses
Business Development and Capture Managers	Service Strategy Service Design
Service Delivery and Account Managers	Service Strategy Service Design
Senior Process and Procedure Engineers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Application Developers and Managers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Data and Network Facility Operations Managers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Development, Testing and QA/QC Managers	Service Transition Continual Service Improvement (CSI)
Project Controllers	Service Strategy Service Design Continual Service Improvement (CSI)
Quality Management System/Service Management System Managers	Continual Service Improvement (CSI)
Project Managers	Service Design Service Transition Continual Service Improvement (CSI)



## ITIL QUALIFICATION SCHEME

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### ITIL Intermediate Training Matrix Based on Role – ITIL Practitioner Course

Role	Recommended
<p>Any individuals who require the ability to act on knowledge acquired from ITIL Foundation and confidently adopt and adapt the ITIL framework in support of business needs including:</p> <ul style="list-style-type: none"><li>• ITSM Process Owners and Process Managers</li><li>• Process Improvement Team (PIT) members</li><li>• ITSM Program Managers</li><li>• Service Management Office (SMO) members</li><li>• Data/process analysts</li><li>• Project and Program Managers</li><li>• Quality Management System/Service Management System Managers</li><li>• Project Managers</li><li>• IT Managers and Team Leads</li></ul>	ITIL Practitioner