



ITIL® VERSION 3: QUALIFICATION SCHEME & ROLE-BASED TRAINING MATRIX WHITE PAPER

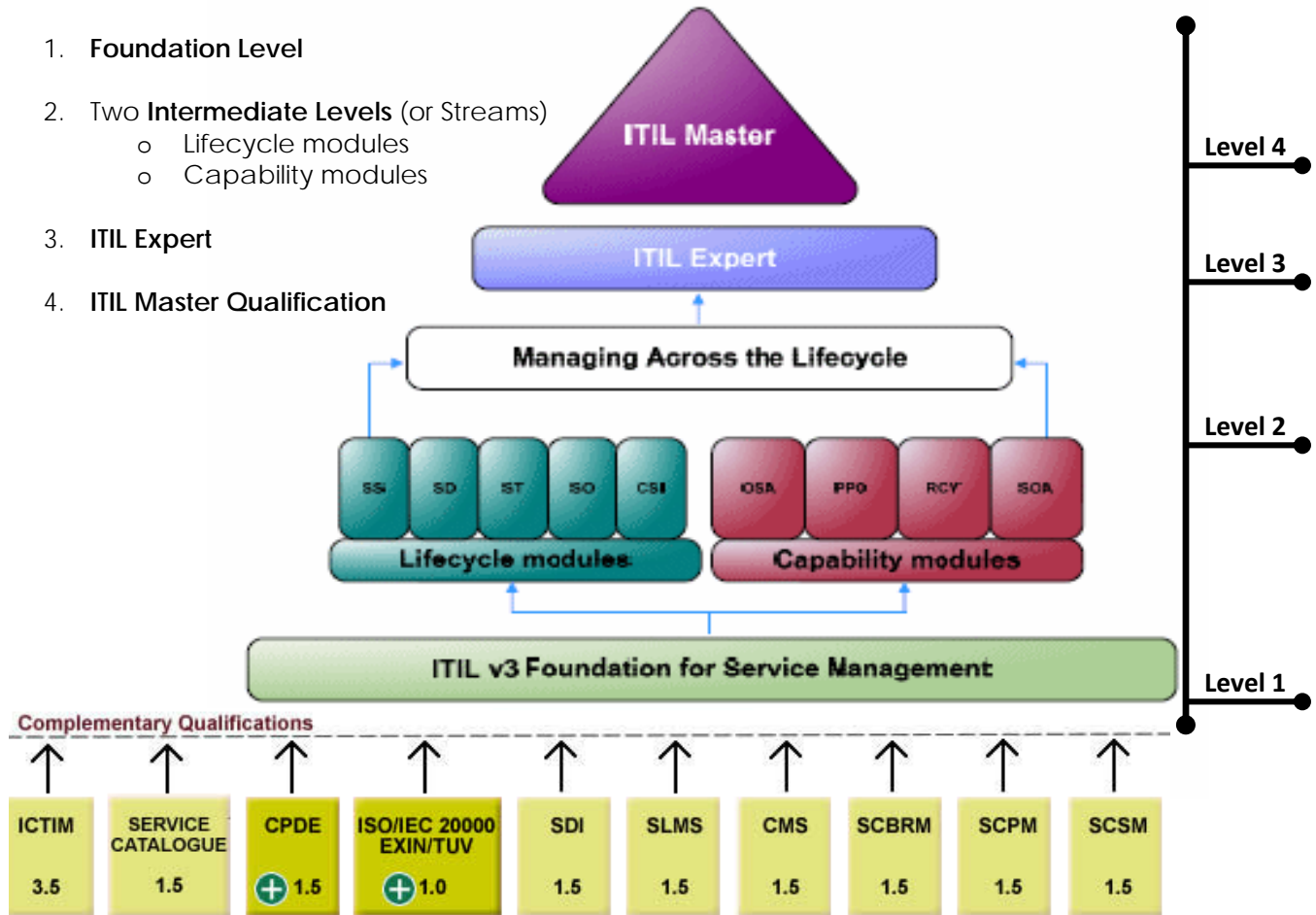
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OVERVIEW

The ITIL Qualifications scheme¹ provides a modular approach to the ITIL framework, and 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 four (4) levels of certification, as detailed in this document². The four (4) levels are shown here, in the inverse:

1. **Foundation Level**
2. Two **Intermediate Levels** (or Streams)
 - o Lifecycle modules
 - o Capability modules
3. **ITIL Expert**
4. **ITIL Master Qualification**



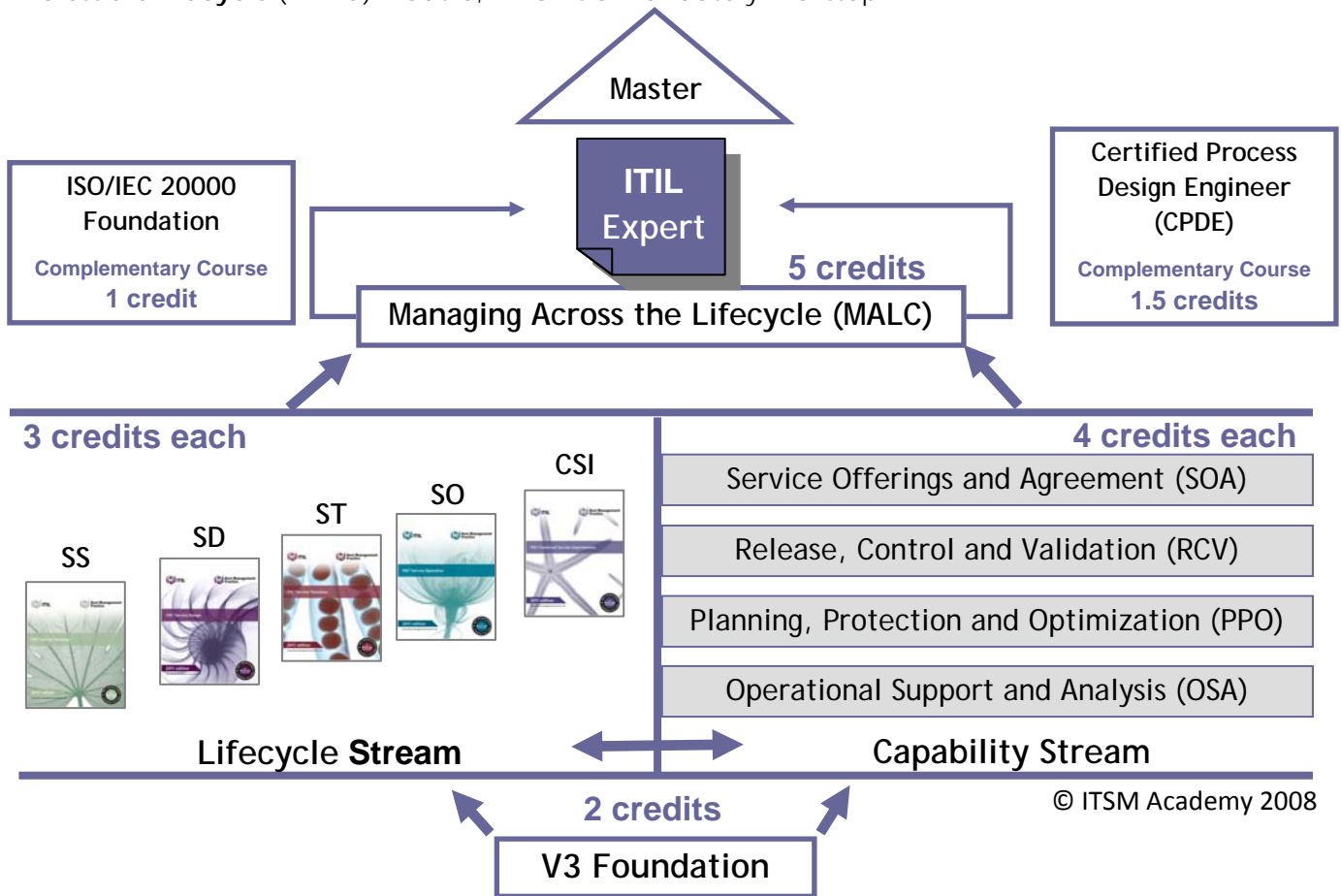
The ITIL Qualification Scheme is supported by a credit system. At each level of education, learners successfully passing the associated certification examination will be awarded credits toward the highest level of certification in the IT Service Management industry today, the ITIL Expert.

To become a certified ITIL Expert, candidates must accumulate a minimum of 22 credits, beginning at the Foundation level (2 credits). Candidates holding a V3 Foundation certificate (or an ITIL V3 Foundation Bridge certificate) can accumulate credits from either of the intermediate streams, as well as the Complementary Qualifications, and then must complete the mandatory **Managing Across the Lifecycle** (MALC) course (5 credits) to become an ITIL Expert. Practitioners are encouraged to utilize the APMG’s web-based, interactive Credit Profiler³,

¹ The full ITIL® V3 Qualification Scheme was released by the Office of Government Commerce (OGC), owners of the ITIL® trademark, in early November 2007. Read the report at www.itil-officialsite.com.
² This document is based on the ITIL Service Management Practices: V3 Qualifications Scheme document written by the Chief Examiner, Sharon Taylor, released on November 7, 2007. It has been updated with each update to the official document.
³ <http://www.itil-officialsite.com/itilservices/v1/map.asp>

PATH TO ITIL EXPERT CERTIFICATION

As stated above, this certification is achieved by accumulating credits through the first two (2) levels of the Scheme. There is no single examination required for this certification; however candidates must achieve credits through a selection of balanced subject areas. To achieve the certification, candidates must obtain a minimum of twenty-two (22) credits, two (2) of which must be from the **Foundation** module, which is a mandatory first step, and five (5) of which must be from the **Managing Across the Lifecycle** (MALC) module, which is a mandatory final step.



The diagram above provides further detail to the OGC Certification Scheme, shown on Page 1. This diagram indicates the “points” or credits earned with each certification.

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. Once successfully completing either the V3 Foundation course or the Foundation Bridge (retired December 31, 2010), learners may proceed to the next level of certification.

2. Intermediate Level

The two (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 design and implementation of ITIL processes. The Lifecycle courses focus on the contribution of these processes to the overall IT Service Lifecycle and are concerned with management and control, rather than design and implementation.

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

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

Lifecycle education is aimed at individuals tasked with developing processes to coordinate and manage the activities of the various Lifecycle process owners. 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 four **Service Capability clustered modules** (with the correlating Version 2 Practitioner Clusters) are:

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

ITIL® QUALIFICATION SCHEME

The **Service Lifecycle** stream is focused on each stage of the lifecycle. Each certification covers the principles, processes, functions and activities within a given stage. Technology and implementation considerations are also discussed.

The five **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.

3. ITIL Expert

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 tract, which leads to the ITIL Expert.

The purpose of this module/certification is to educate on and test knowledge of the contents of the ITIL core books; focusing on business, management and supervisory objectives, purpose, processes, functions and activities – and on the interfaces and interactions between the processes.

| Managing Across the Lifecycle (MALC) |
|---|
| ITIL Expert Credits: 5 |

4. ITIL Master

The ITIL Master Qualification Certificate 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.

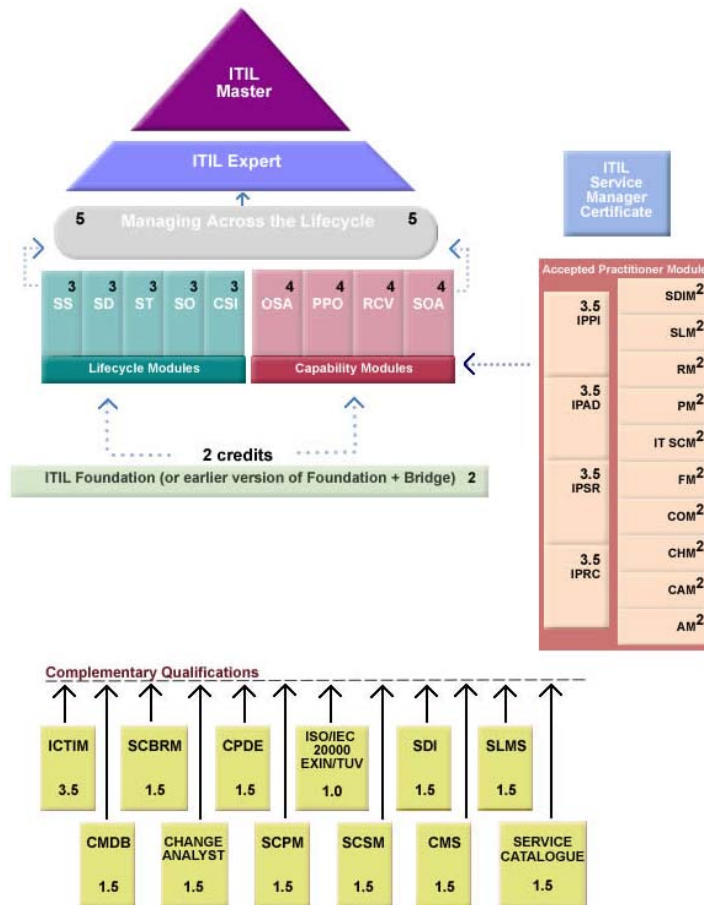
ITIL® QUALIFICATION SCHEME

Following the conclusion of a successful initial Alpha Pilot in 2010, which was carried out to test the technical aspects of the qualification, The ITIL Master qualification is currently undergoing an operational pilot - The Beta Pilot - prior to launch.

The intention of this second and final pilot will be to test the operational and administrative aspects of the process, to ensure that the assessment process is fully supported on a practical level. The APM Group-The Accreditor expect the qualification to be available in the later part of 2011, and full qualification documentation to be available for review in advance of launch.

COMPLEMENTARY QUALIFICATIONS

The ITIL Qualification Scheme recognizes supplementary certifications which link and add value to ITIL Best Practice and the certification portfolio, under the ITIL Complementary Qualifications Scheme⁴. ITSM Academy delivers the Certified Process Design Engineer (CPDE) 5-day course, which earns 1.5 credits and the ISO/IEC 20000 Foundation 2.5-day course, which earns 1 credit.



⁴ <http://www.itil-officialsite.com/Qualifications/ComplementaryQualifications.asp>

ITIL INTERMEDIATE TRAINING MATRIX BASED ON ROLE

The following Role-Based Training Matrix, developed by Rodger Baker, Service Manager/ITIL Expert, Science Applications International Corporation (SAIC), will hopefully help clarify the appropriate training path per role.

| 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) |

| 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) |
| QMS Managers | Continual Service Improvement (CSI) |
| Project Managers | Service Design Service Transition Continual Service Improvement (CSI) |