



ESM and the Big Re-Think

A Webinar prepared for ITSM Academy

Sustainable ESM with the USM method

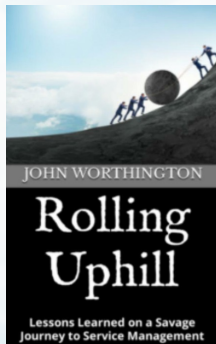
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About me...

- 40+ years in IT, 20 years in service management
 - CPDE, ITIL Expert (v3), XLA Master, Certified USM Coach
 - Former ITSM Academy Instructor

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My goal is to help customers with the endless, uphill roll that is continual improvement.

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Note:

Universal Service Management, or the *Universal* Service Management Body of Knowledge (USMBOK™) are in no way related to the **Unified** Service Management method (USM method), or its acronym USM.

Agenda

- Enterprise Service Management and the Big Re-Think
- The Unified Service Management method (USM method)
- Giving new life to old thinking
- Conclusion



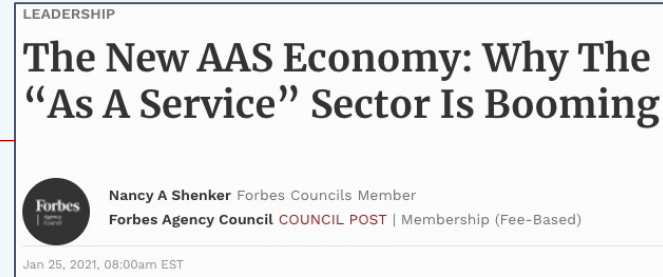
Service Management Evolution

Time for a re-think...



Where Are We Now?

(and where have we been?)



Goods-
Dominant Logic

Service-
Dominant Logic

We are all service providers

- Today's economy is dominated by services
- Service is the fundamental basis for all value exchange
- Managing services is crucial for successful organizations

Cloud,
XaaS

N-Tier,
Web

Mainframes,
monoliths

PCs,
Client-Server

Technology

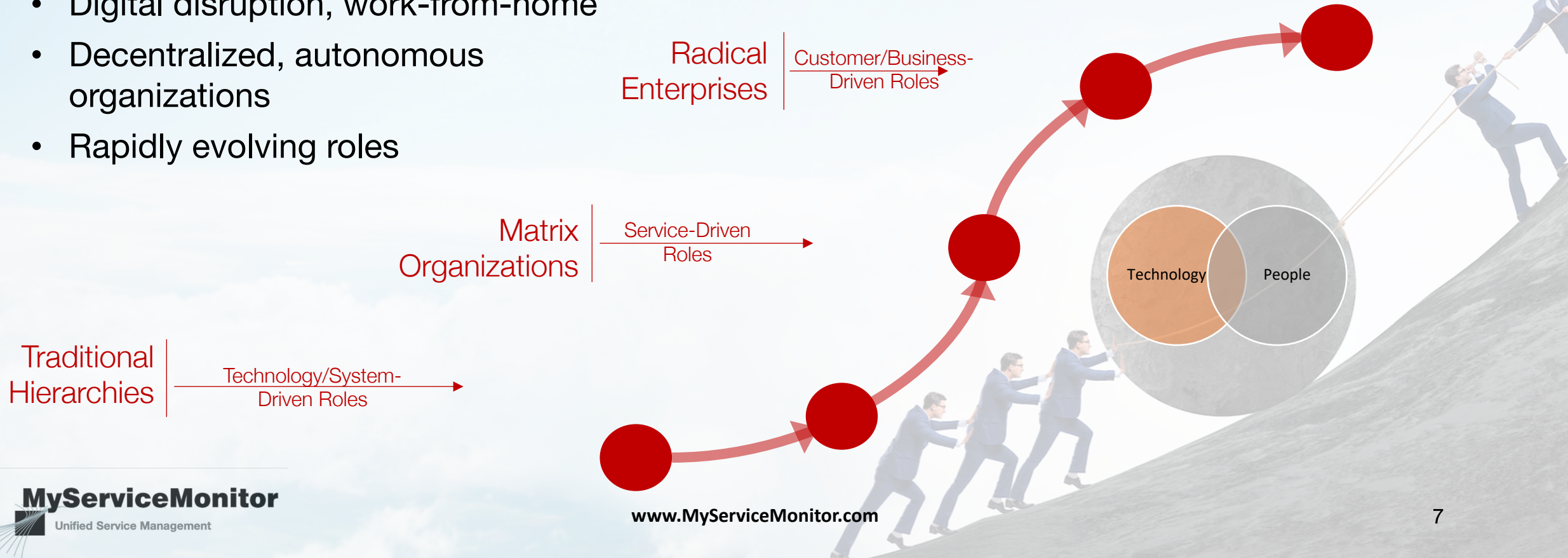
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Where Are We Now?

(and where have we been?)

The nature of work is changing

- Digital disruption, work-from-home
- Decentralized, autonomous organizations
- Rapidly evolving roles



Where Are We Now?

(and where have we been?)

Complexity is accelerating

- Multiple practice frameworks
- ITILv4 *Process to Practice*



ITILv3
(28 Processes)

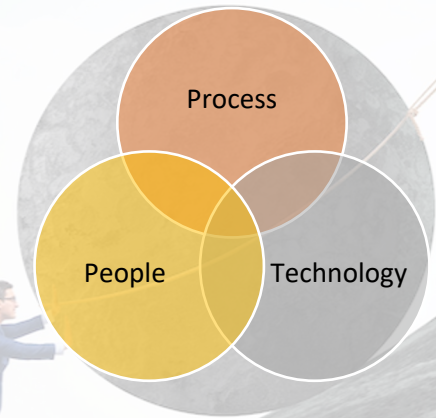
ITIL 4
(34 Practices)

ITILv1
(40+ Books)

ITILv2
(12 Processes)

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Unified Service Management



Where Are We Now?

(and where have we been?)

The Customer is King

- Customer Experience drives digital success
- Every interaction is important



ESM and the Big Re-Think

- Everyone's a service provider
- The nature of work has changed forever
- Complexity continues to explode
- The Customer is King

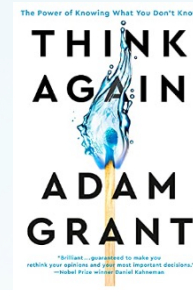
Two decades of applying best practice frameworks while business and technology have continued to accelerate has resulted in a complexity that is unmanageable.

ESM and the Big Re-Think

The shift to enterprise service management and the desire to achieve customer-driven levels of maturity will continue to be stifled unless this complexity is addressed.

Customers need a way to continue to leverage existing and emerging best practice frameworks, but they must also simplify service management in order to meet the needs of the digital future.

ESM and the Big Re-Think



"...in a turbulent world, there's another set of cognitive skills that might matter more: the ability to rethink and unlearn."

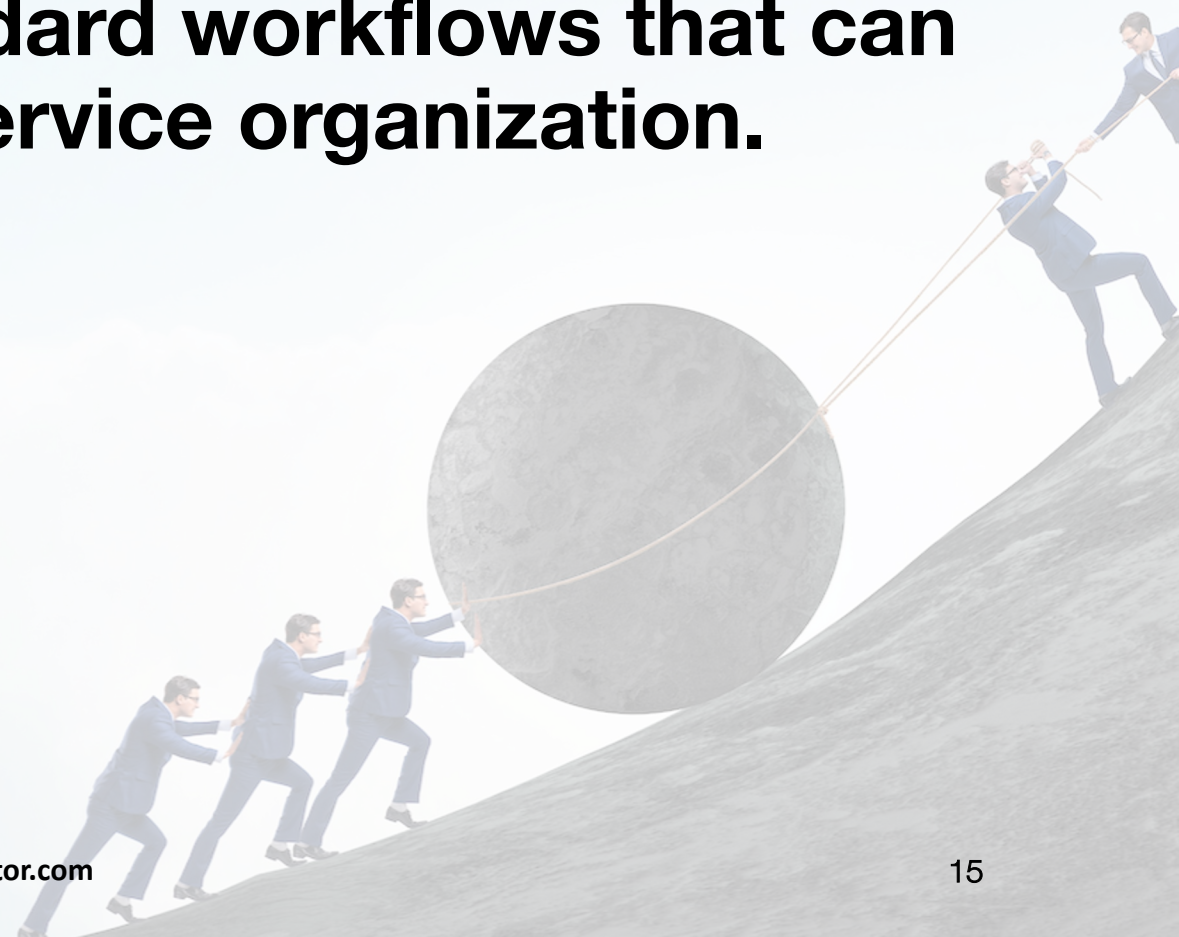
The Unified Service Management method

Sustainable Enterprise Service Management

Unified Service Management

A method to establish a service management system with 5 processes and 8 standard workflows that can apply to ANY team or service organization.

- Affordable
- Easy to learn & use
- Complimentary to any framework



The USM Method

- A **method** that specifies an enterprise service management architecture
- Promotes standardization and interoperability between service domains
- Provides a series of service building blocks that are addressed in the management system of each service organization



Maturity in relation to value creation

Value Creation Maturity Model

Measures the added value in a customer-provider relationship...

ITILv4
(34 Practices)

Customer driven

Business driven

Process Capability/Maturity Model

...measures the degree of perfection with which a party performs a certain action i.e., process)

ITILv3
(28 Processes)

Service driven

ITILv2
(12 Processes)

Technology driven

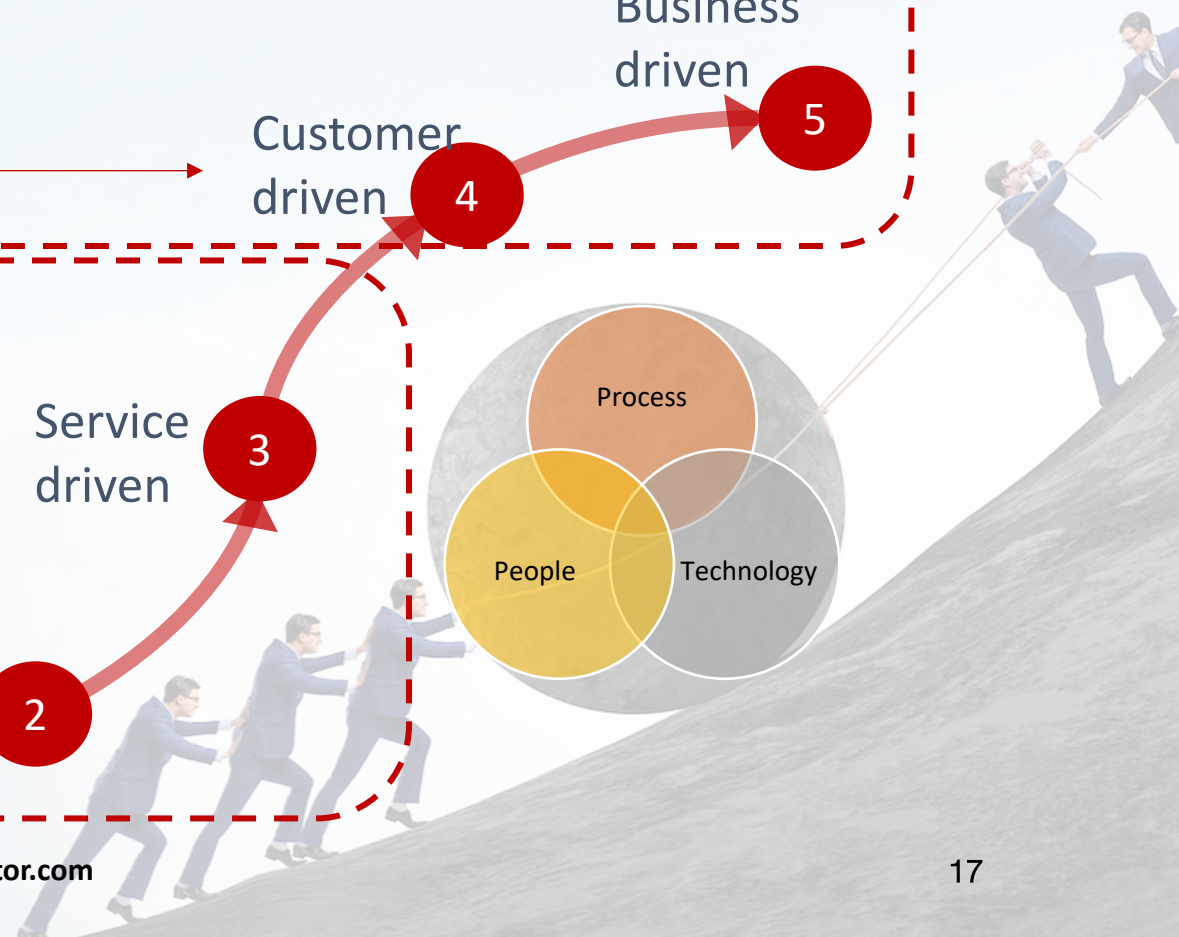
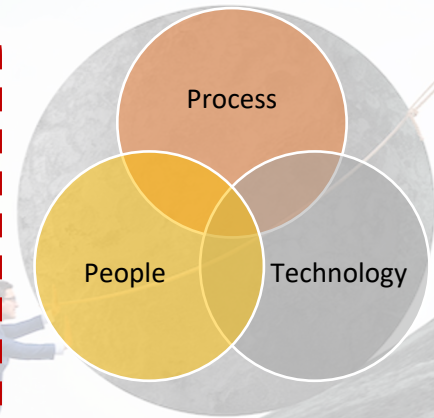
System driven

ITILv1
(40+ Books)

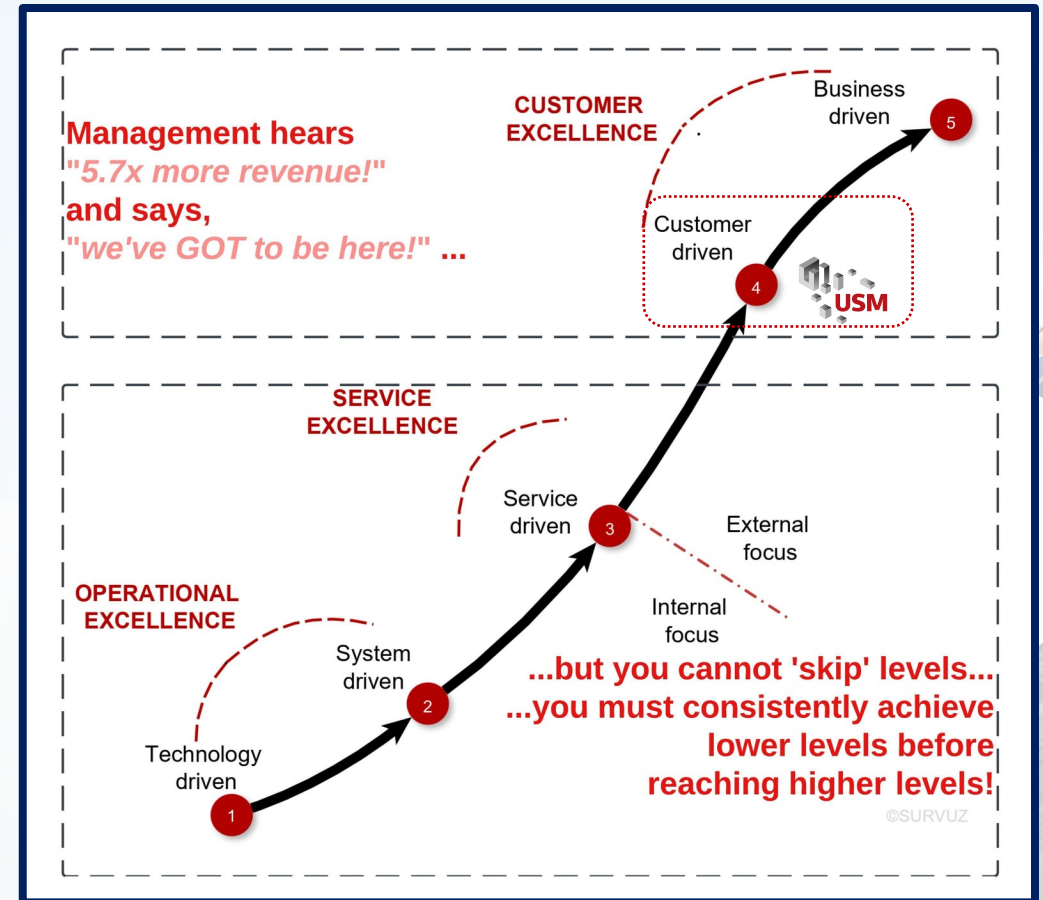
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Maturity in relation to value-creation

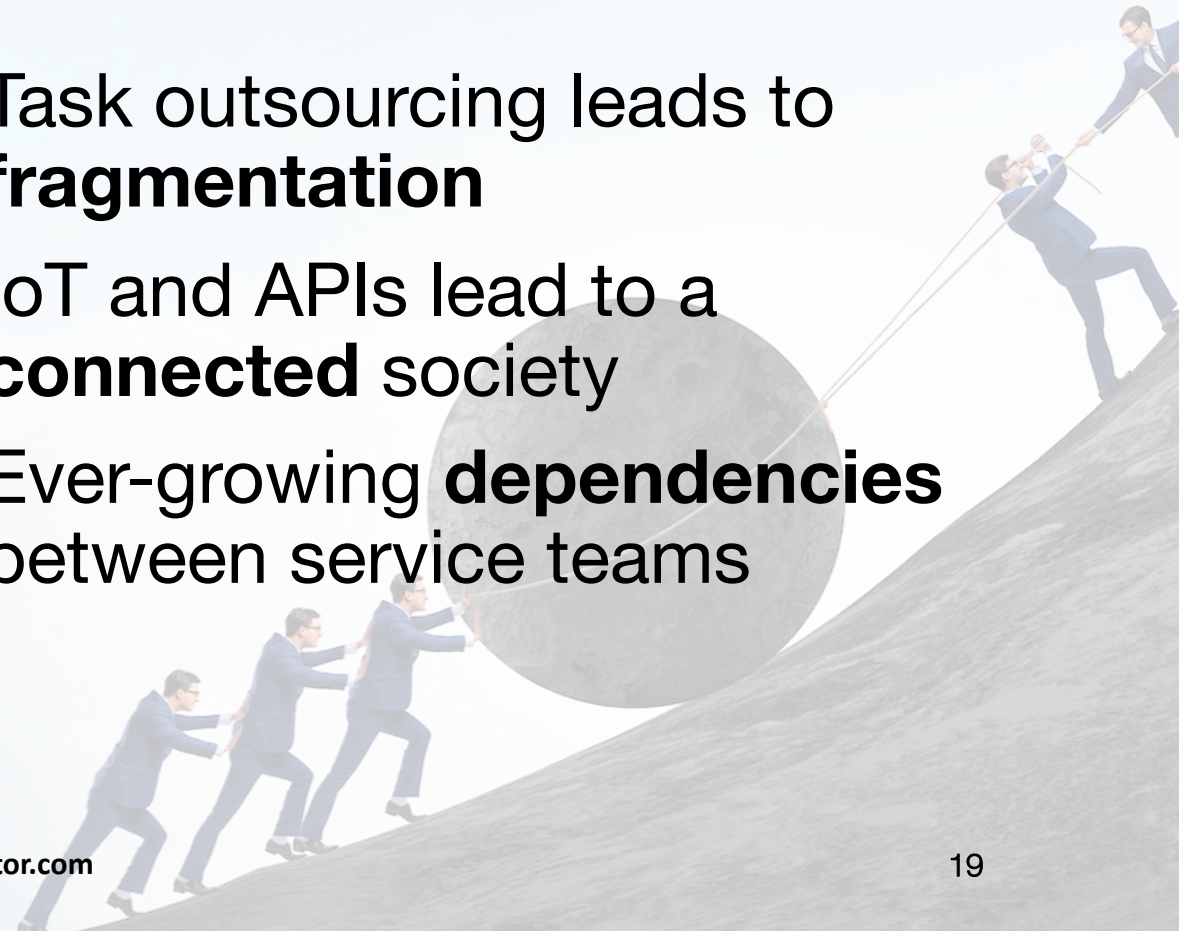


Fragmented, connected & dependent society

USM supports an integral and integrated management approach...

...which restores and optimizes the control over each service team contribution to the whole system

- Task outsourcing leads to **fragmentation**
- IoT and APIs lead to a **connected** society
- Ever-growing **dependencies** between service teams



Links in supply chains and networks

A singular normalized management system as an acceptable link is the core concept of the Unified Service Management method, and it is based on the concept of an integral and integrated process architecture

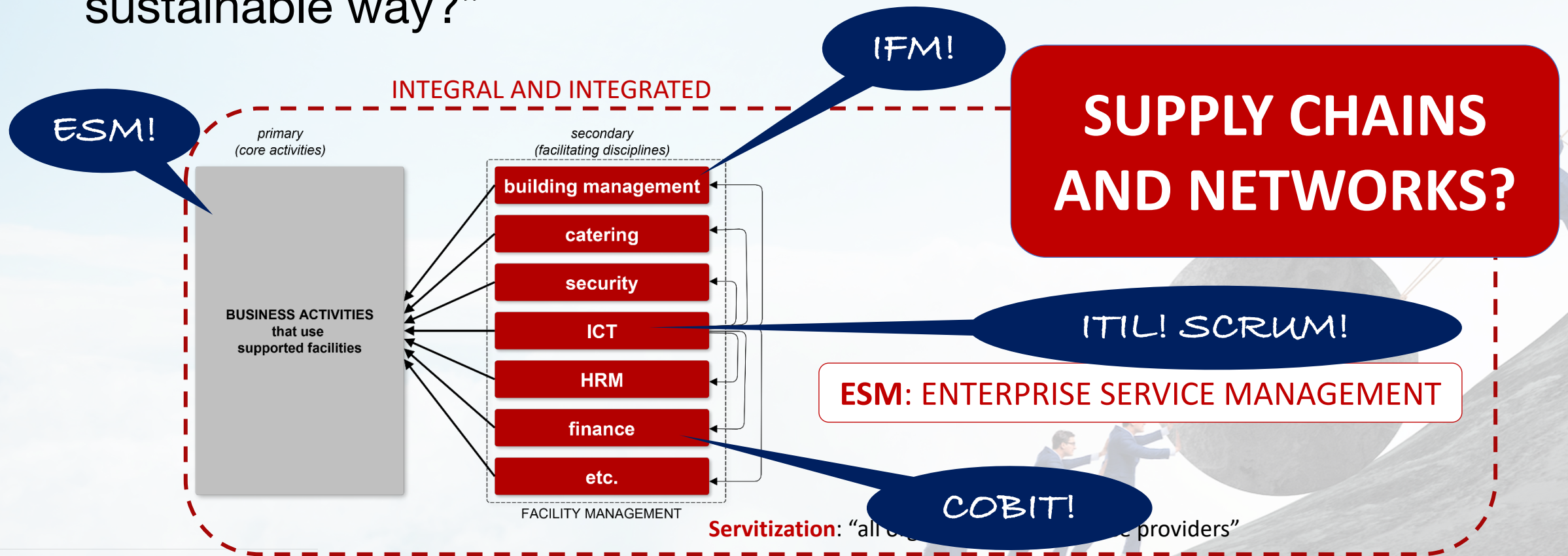
USM improves interoperability across service domains



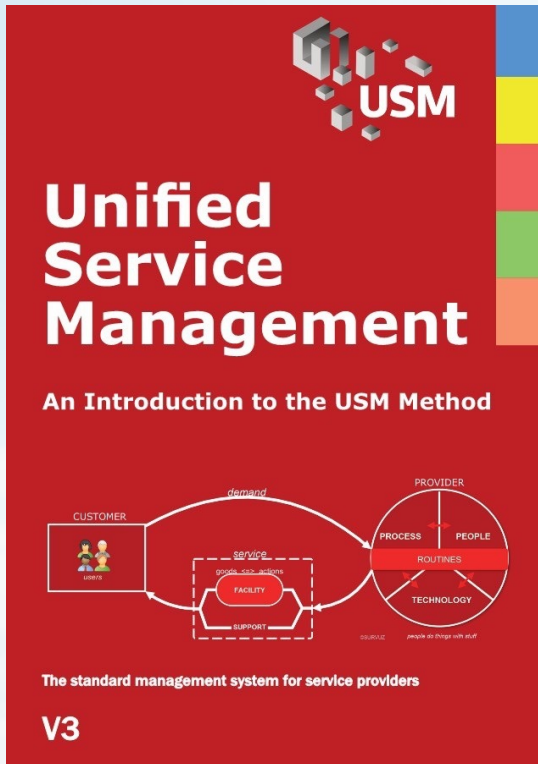
The challenge

Many specialized
practice frameworks!

“How do you make sure that **all service teams** cooperate in a sustainable way?”



The Position of USM



***USM is a METHOD that
can leverage
ANY
practice framework***

METHODS ← → FRAMEWORKS



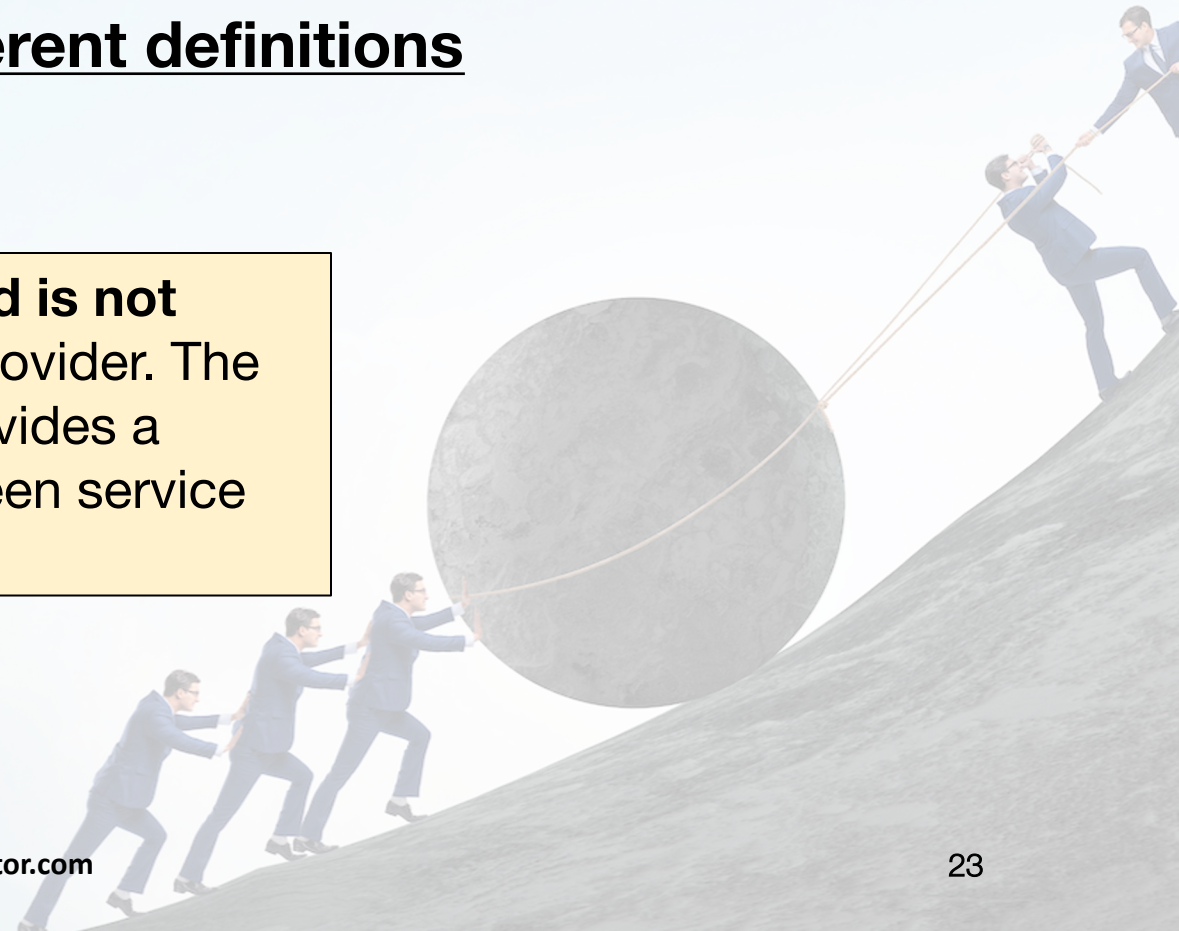
Challenges with service definition

ITIL v3, ITIL v4, VeriSM™ , ISO20K, TOGAF...

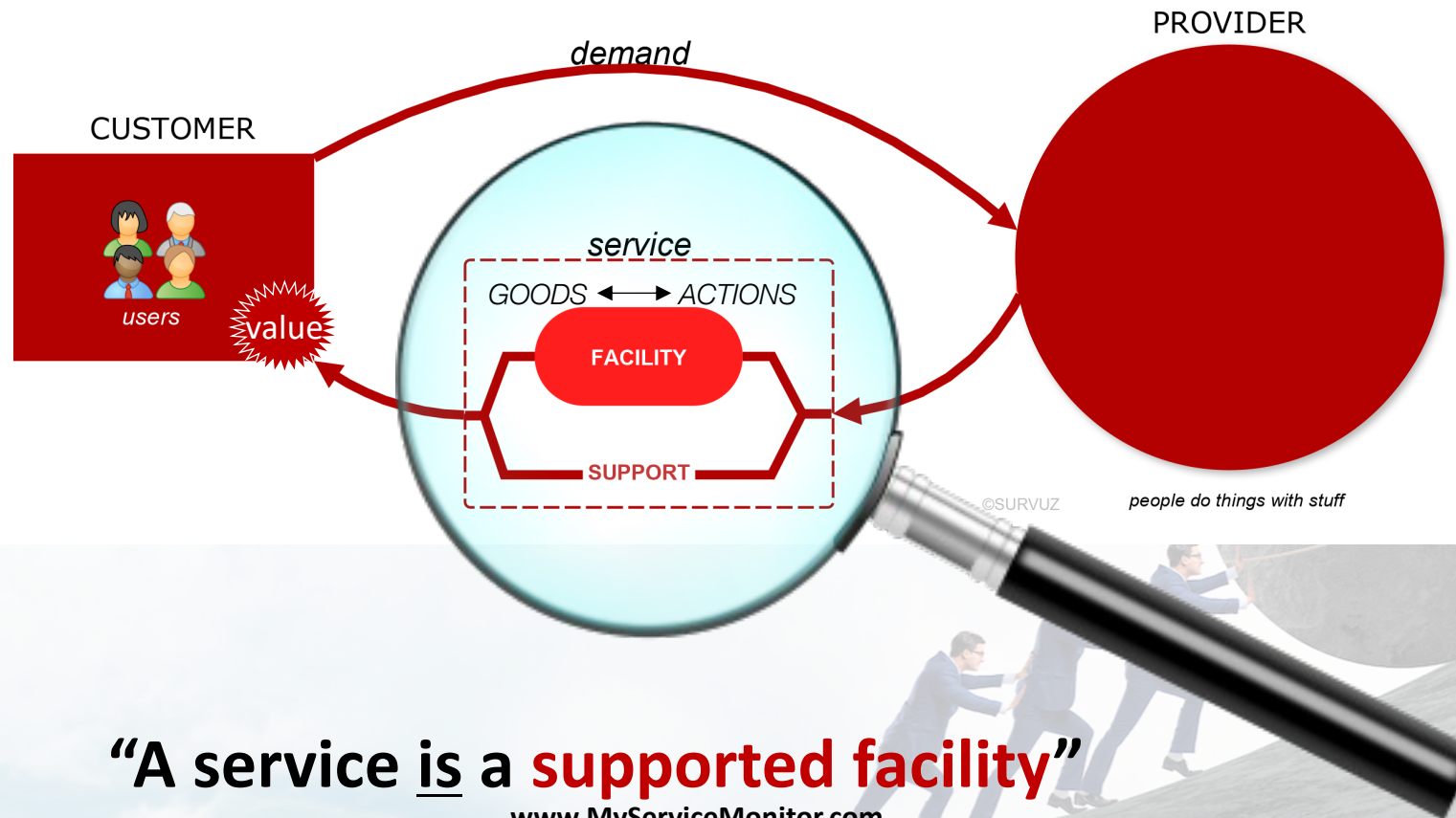
In fact, the **ISO standards** have 100 different definitions of what is a 'service'¹ ...

It's important to understand that **the USM method is not limited to IT services**; it applies to any service provider. The **USM Customer-Provider Interaction Model** provides a standard link which can be used within and between service providers *of any kind and any size*.

¹ <https://usm-portal.com/100-iso-and-iec-definitions-of-service/?lang=en>



USM Customer-Provider Interaction Model

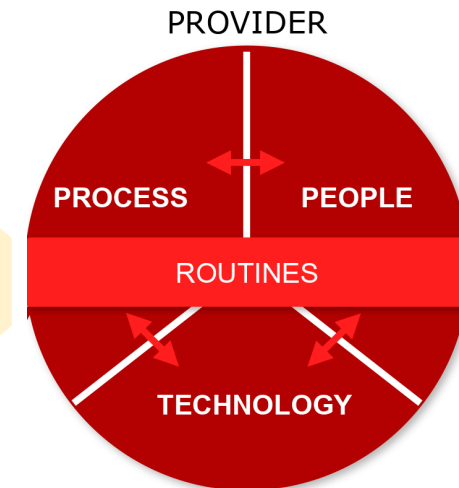


“A service is a supported facility”

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Building block: Routines

The management of these routines can be considered the core of the USM method.

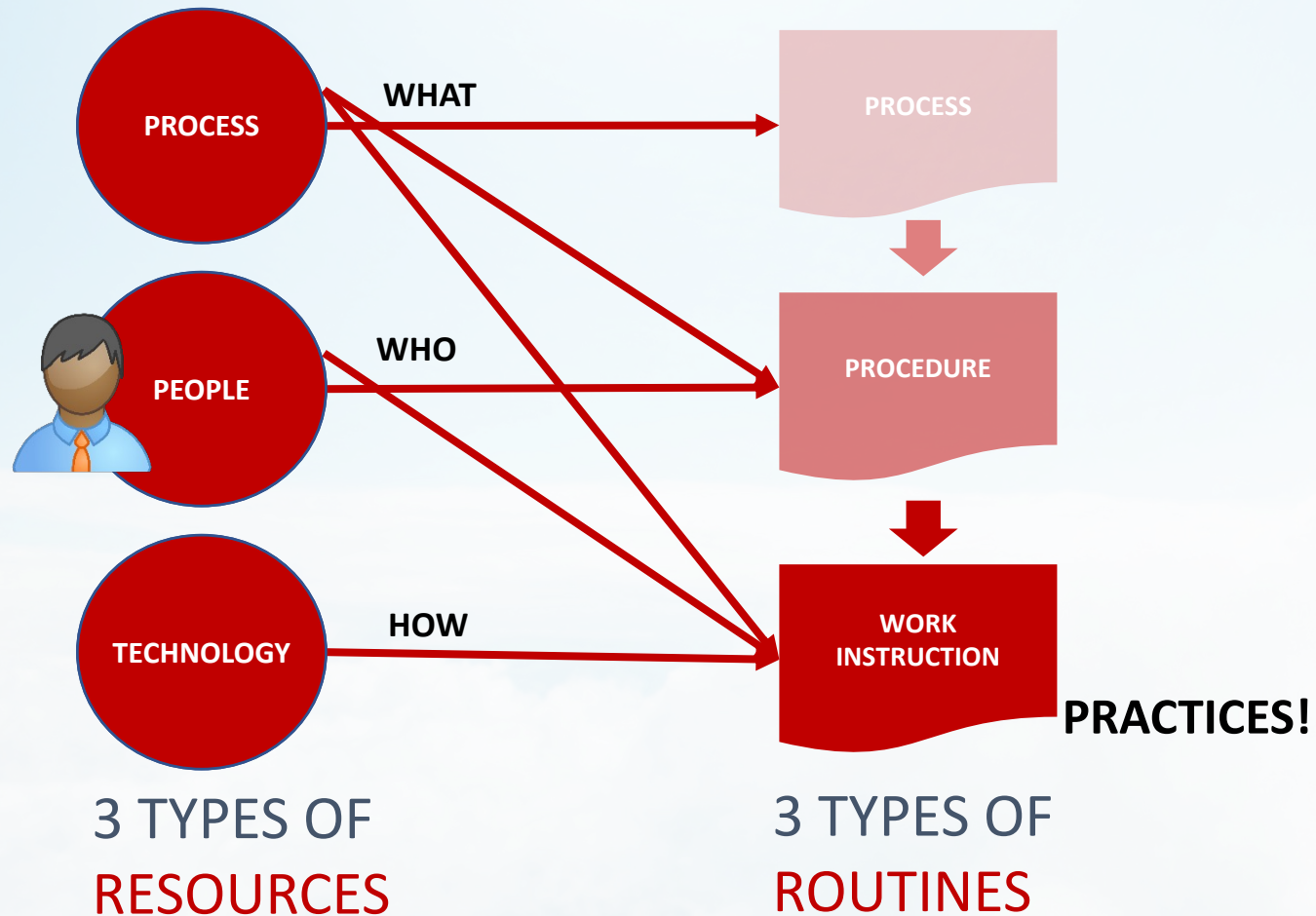


RVUZ

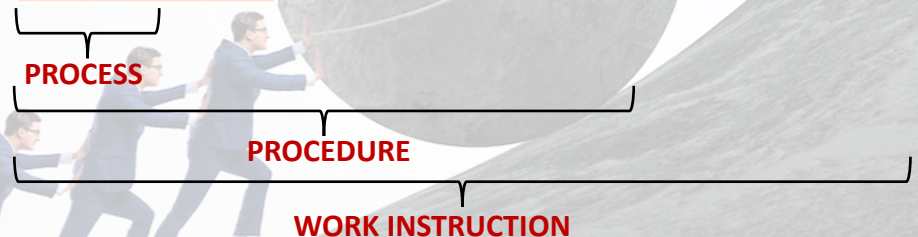
people do things with stuff

Routines and processes

Routines can be derived from the USM Process Model via templates



| WHAT | WHO | HOW |
|-------------|-----------------------------|----------------|
| activity 1 | servicedesk agent | instruction 1 |
| activity 2 | servicedesk manager | instruction 2 |
| activity 3 | application administrator | instruction 3 |
| activity 4 | systems administrator | instruction 4 |
| activity 5 | servicedesk agent | instruction 5 |
| activity 6 | change coordinator | instruction 6 |
| activity 7 | capacity manager | instruction 7 |
| activity 8 | risk manager | instruction 8 |
| activity 9 | security manager | instruction 9 |
| activity 10 | director | instruction 10 |
| activity 11 | servicedesk agent | instruction 11 |
| activity 12 | servicedesk manager | instruction 12 |
| activity 13 | director | instruction 13 |
| activity 14 | enterprise architect | instruction 14 |
| activity 15 | configuration administrator | instruction 15 |
| activity 16 | operations coordinator | instruction 16 |
| activity 17 | work planner | instruction 17 |
| | | |



Challenges with process definition

Process: a set of ... activities that transform inputs into outputs – ITIL v4

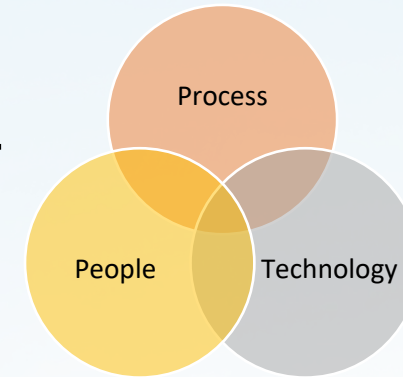
*...if you accept the notion that a process is a set of related activities, then **any set of related activities, regardless of scope or scale, constitutes a process**, and any label for activity is also a legitimate synonym for process.*

© Fred Nickols 2016 - THE DIFFICULT PROCESS OF IDENTIFYING PROCESSES



Process vs. practice

Practice: a set of organizational resources designed for performing work or accomplishing an objective – ITIL v4



In practice, people are particularly inclined to get involved with the specifications of routines of the type of **procedure** and **work instruction** --- and not with **processes**.

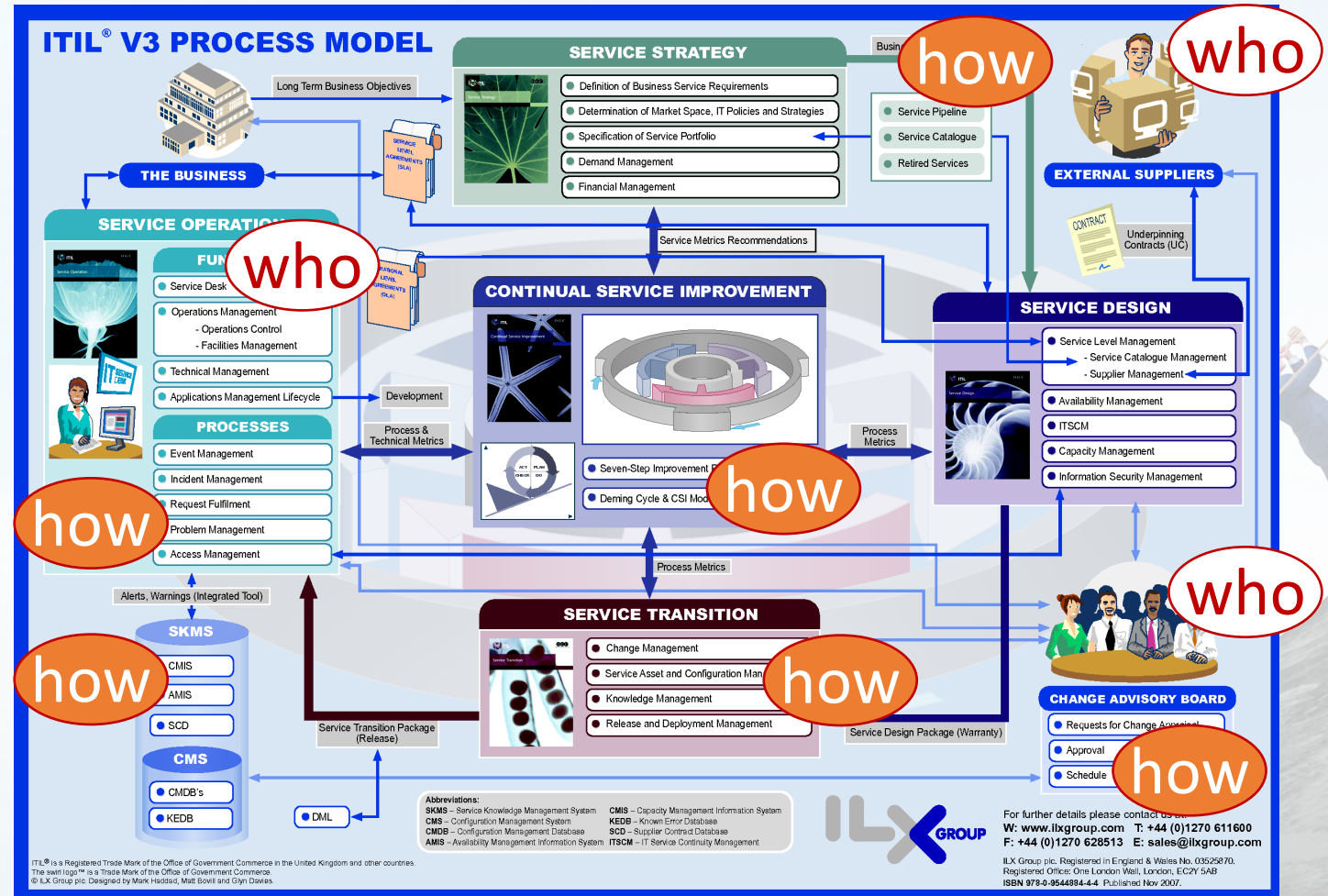
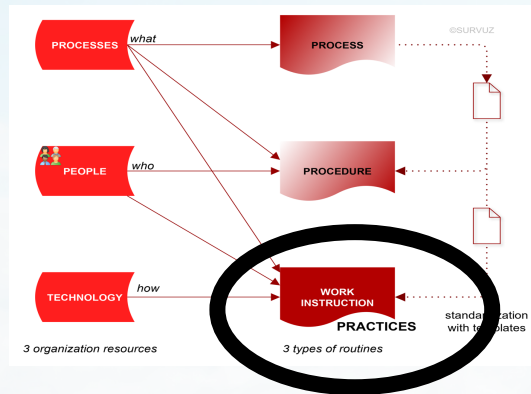
This is how the popular 'practice' came into being, quickly applicable, but not derived from the underlying process model.

As a result, these practices lack structural coherence with other practices within the organization. The application of large numbers of practices creates a complexity that soon becomes unmanageable.



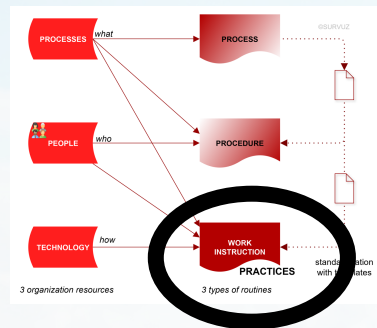
Process vs. practice

Process Models with Who and How



Process vs. practice

BPM swim lanes
with more of the
same...



The USM process design criteria

1. A process describes **WHAT** must happen consecutively, not WHO or HOW.
2. A process can be interpreted with a **verb**.
3. A process can be **counted**.
4. Processes are not dependent on practical **conditions** (◇)
5. Processes have a customer-relevant and unique **goal**.
6. A process can be divided into **sub processes**, but that does not change the process.



Demystifying the term PROCESS: 10 requirements

<https://www.linkedin.com/pulse/demystifying-term-process-jan-van-bon/>

The USM Process Model for service delivery

Integrated, non-redundant process model with **5 processes** and a simple set of **8 workflows** that serve as templates for all daily routines in any service providers' practice.

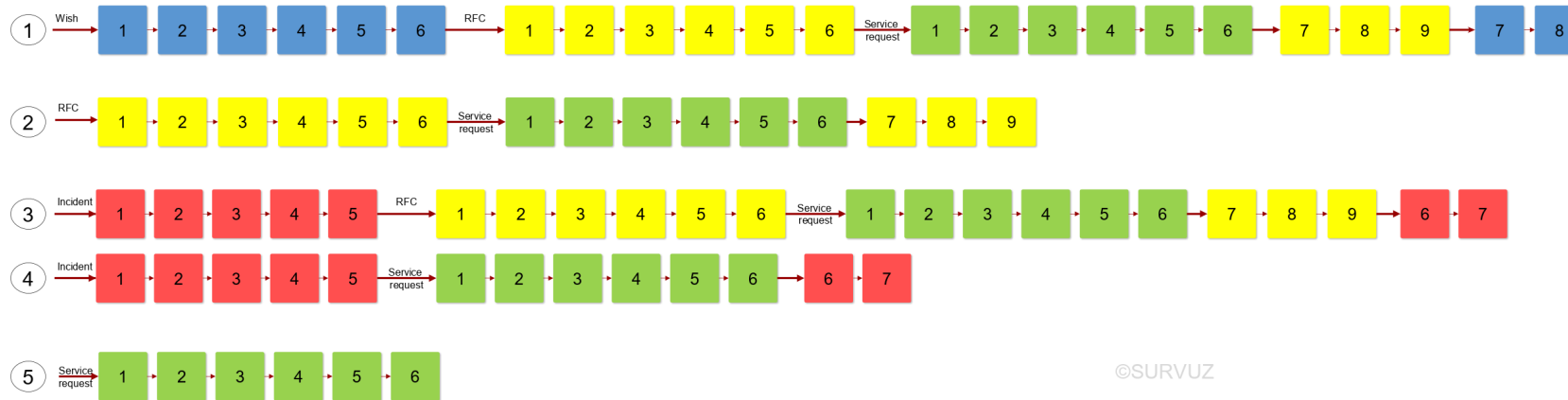
Non-Redundant – each activity occurs only once

Customer-focused – all processes have a customer-relevant output

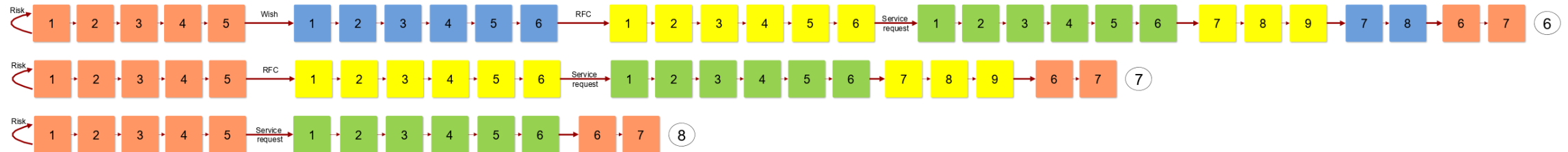
Integral & Integrated – the processes *together* comprise all patterns for interaction with a customer

The USM Workflows

5 workflows can be triggered by **external demand** (REACTIVE)

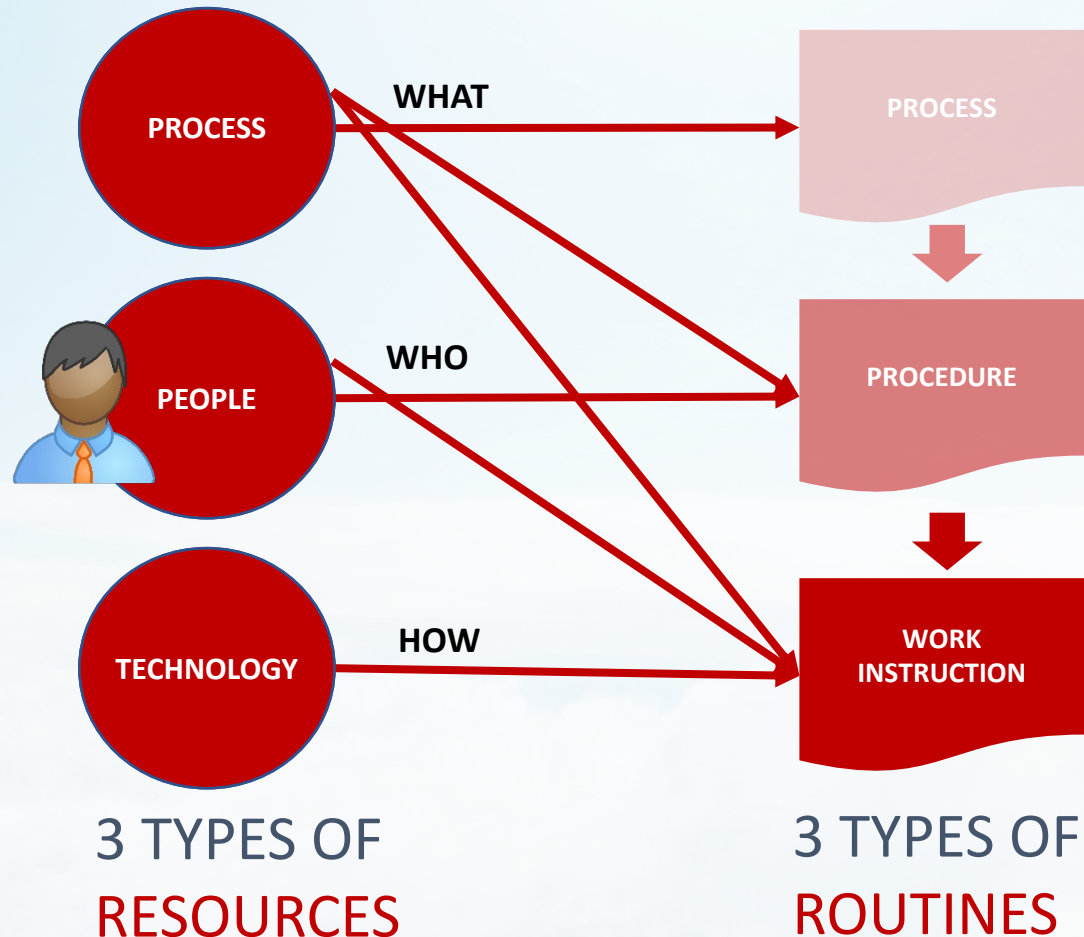


3 WORKFLOWS ARE TRIGGERED BY **INTERNAL DEMAND** (PROACTIVE)



Routines and processes

Routines can be derived from the USM Process Model via templates



| Activity | Who | How | Activity | Who | How |
|----------------------------------|-----|-----------------------|----------------------------------|-----|-----|
| CTM 1 Accept wish | 1 | Service desk agent | RIM 1 Identify risks | 6 | |
| CTM 2 Classify | | Sr service desk agent | RIM 2 Classify | | |
| CTM 3 Specify the service | | Service manager | RIM 3 Determine cause | | |
| CHM 1 Accept RFC | 2 | | RIM 4 Select measure | | |
| CHM 2 Classify | | | RIM 5 Implement measure | | |
| CHM 3 Plan & agree | | | CTM 1 Accept wish | | |
| CHM 4 Implement | | | CTM 2 Classify | | |
| CHM 5 Recover | | | RIM 1 Identify risks | 7 | |
| INC 1 Accept Incident | 3 | | CTM 2 Classify | | |
| INC 2 Classify | | | RIM 3 Determine cause | | |
| INC 3 Analyse | | | RIM 4 Select measure | | |
| INC 4 Prepare recovery | | | CHM 1 Accept RFC | | |
| INC 5 Recover | | | CHM 2 Classify | | |
| CHM 1 Accept RFC | | | CHM 3 Plan & agree | | |
| CHM 2 Classify | | | CHM 4 Implement | | |
| CHM 3 Plan & agree | | | CHM 5 Recover | | |
| CHM 4 Implement | | | OPS 1 Accept service requests | | |
| CHM 5 Recover | | | OPS 2 Classify | | |
| OPS 1 Accept service requests | | | OPS 3 Plan activities | | |
| OPS 2 Classify | | | OPS 4 Execute activities | | |
| OPS 3 Plan activities | | | OPS 5 Review delivery & feedback | | |
| OPS 4 Execute activities | | | OPS 6 Evaluate & close | | |
| OPS 5 Review delivery & feedback | | | | | |
| OPS 6 Evaluate & close | | | | | |

USM provides standardization at a process/workflow level (WHAT) without sacrificing flexibility at lower levels (WHO, HOW)

The USM Process Model Decision Tree - Workflows

Simplification is possible!

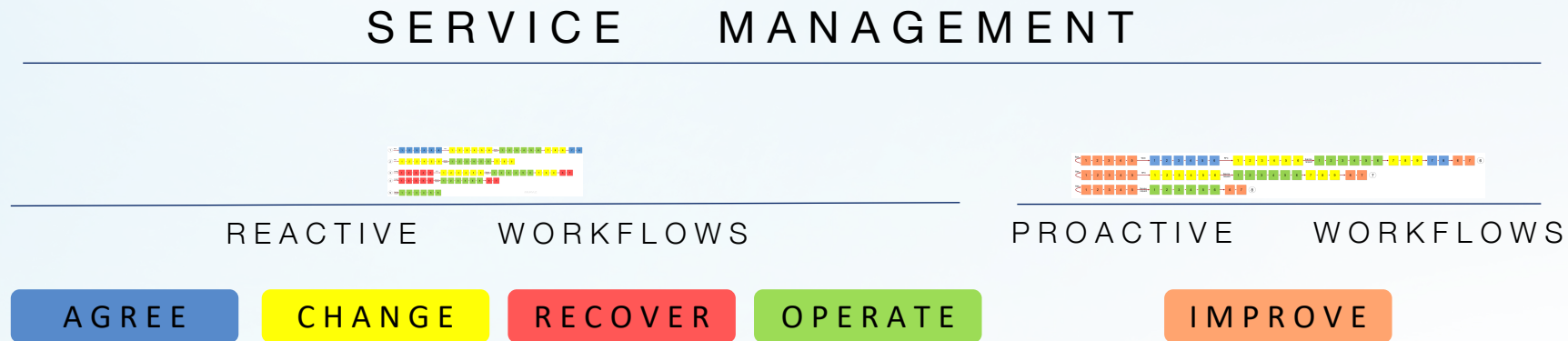
*"I can tell you I've been out with several customers and several sessions, and I've had a big bottle of wine that Jan is willing to share with us if we can find another way [not included in the 8 workflows] and we've been trying to do that **for the last 3 years** and I can't come up with it..."*

We've come up with a lot of routines, IT, non-IT, facilities, HR... we tried them all... and it's always one of these workflows that guides you in the most optimal way."



Jeroen Bekaert, Dutch Ministry

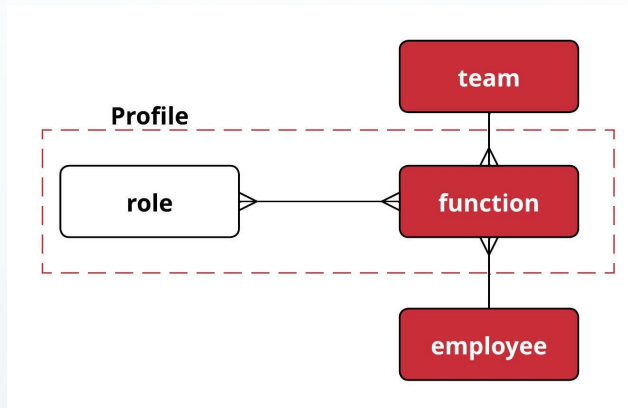
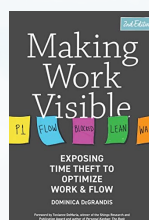
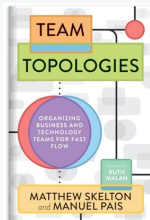
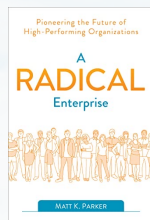
Unified Service Management



USM enables the enterprise to get in control of its service delivery, with a management system of 5 processes and 8 workflows. It is a methodical approach that is based on a service management architecture that establishes a service management system.

Unified Service Management

USM provides a standardized, unified link for sustainable supply chains in service ecosystems. The process model and standardized workflows are used by *any organizational topology*, leveraging *any combination of practice frameworks* for *all service providers*.



*any
organizational
topology*

Unified Service Management

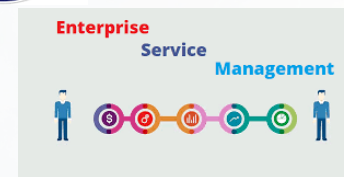
USM provides a standardized, unified link for sustainable supply chains in service ecosystems. The process model and standardized workflows are used by *any organizational topology*, leveraging *any combination of practice frameworks* for *all service providers*.



Unified Service Management

USM provides a standardized, unified link for sustainable supply chains in service ecosystems. The process model and standardized workflows are used by *any organizational topology*, leveraging *any combination of practice frameworks* for *all service providers*.

Primary/secondary,
facilitating,
internal/external service
providers



*all
service
providers*

USM is SIMPLE...

***5 processes and
8 standard workflows***

Implementing USM

Giving new life to old thinking

USM and tooling

Service delivery coordination

(Service desk tool)

Managed Infrastructure Register (MIR)

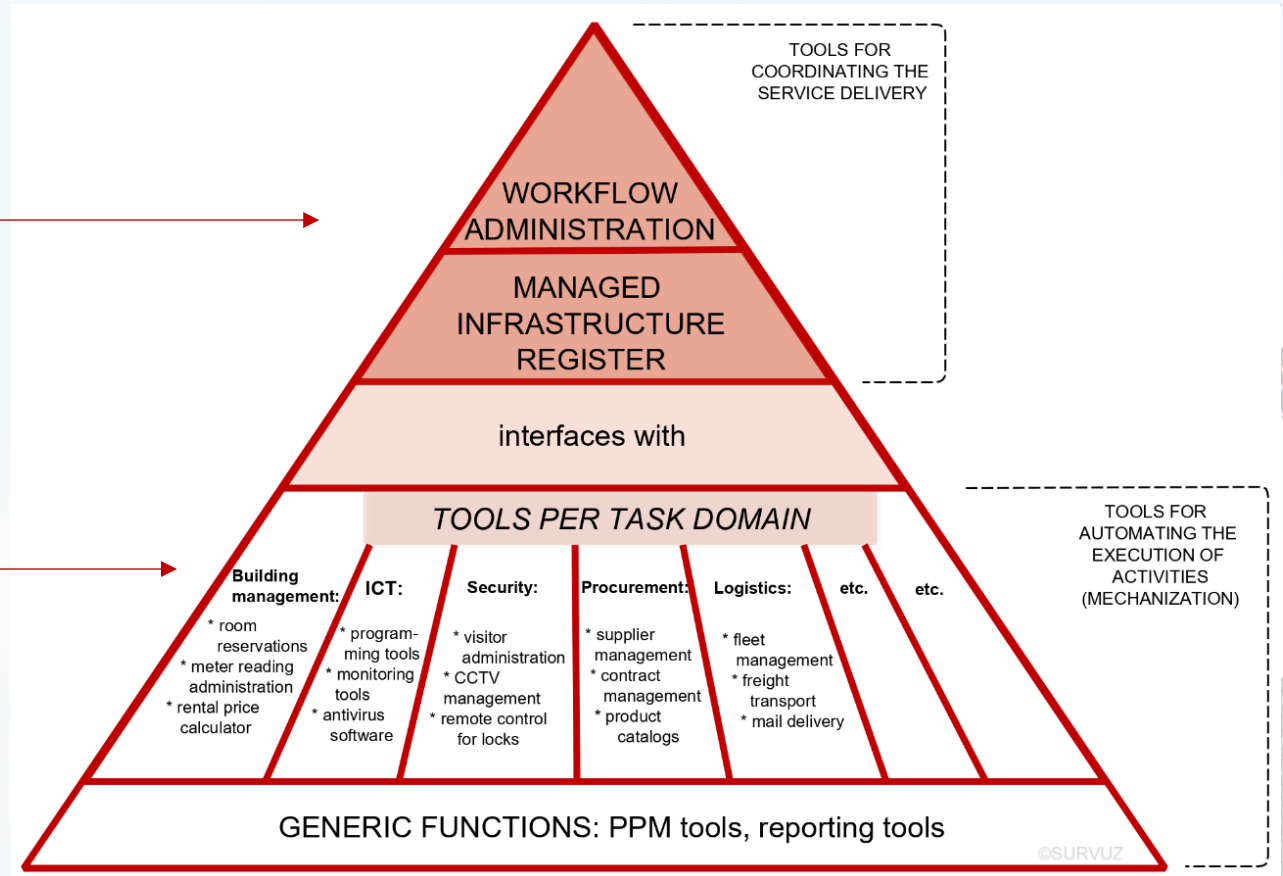
(CMDB)

Automated execution/mechanization

(knowledge mgt, reporting, monitoring, etc.)

Generic (i.e., all task domains)

(templates, documents, forms, etc.)



Standardized deployment protocol

- Flexible deployment strategy
- Step by step improvement
- Iterative, agile approach
- Focused on *learning to apply* the method



The USM approach is aimed at maximizing the self-sufficiency of the service organization.

The USM deployment protocol describes how an organization handles *formalized deployment* in an agile, step-by-step approach.

Organizations can adopt or adapt this approach at will or replace it with their own approach to organizational improvement.

Iterative, agile approach

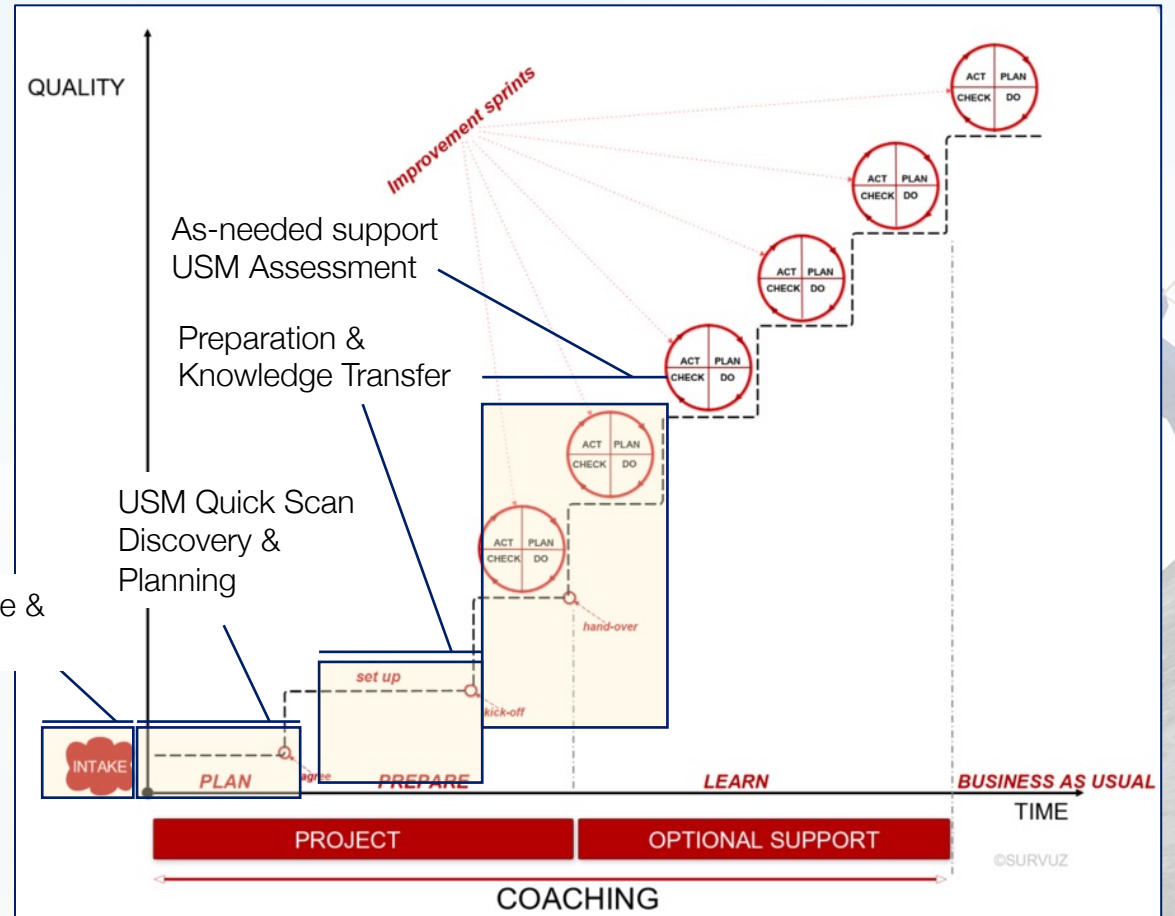
Intake – “we’re going to deploy USM (somewhere)

Planning – Determine high-level deployment plan

Prepare – Prepare roadmap and improvement sprints; perform initial sprint

Improvement Sprints – Limited set of improvements focused on routines (people, process, tools)

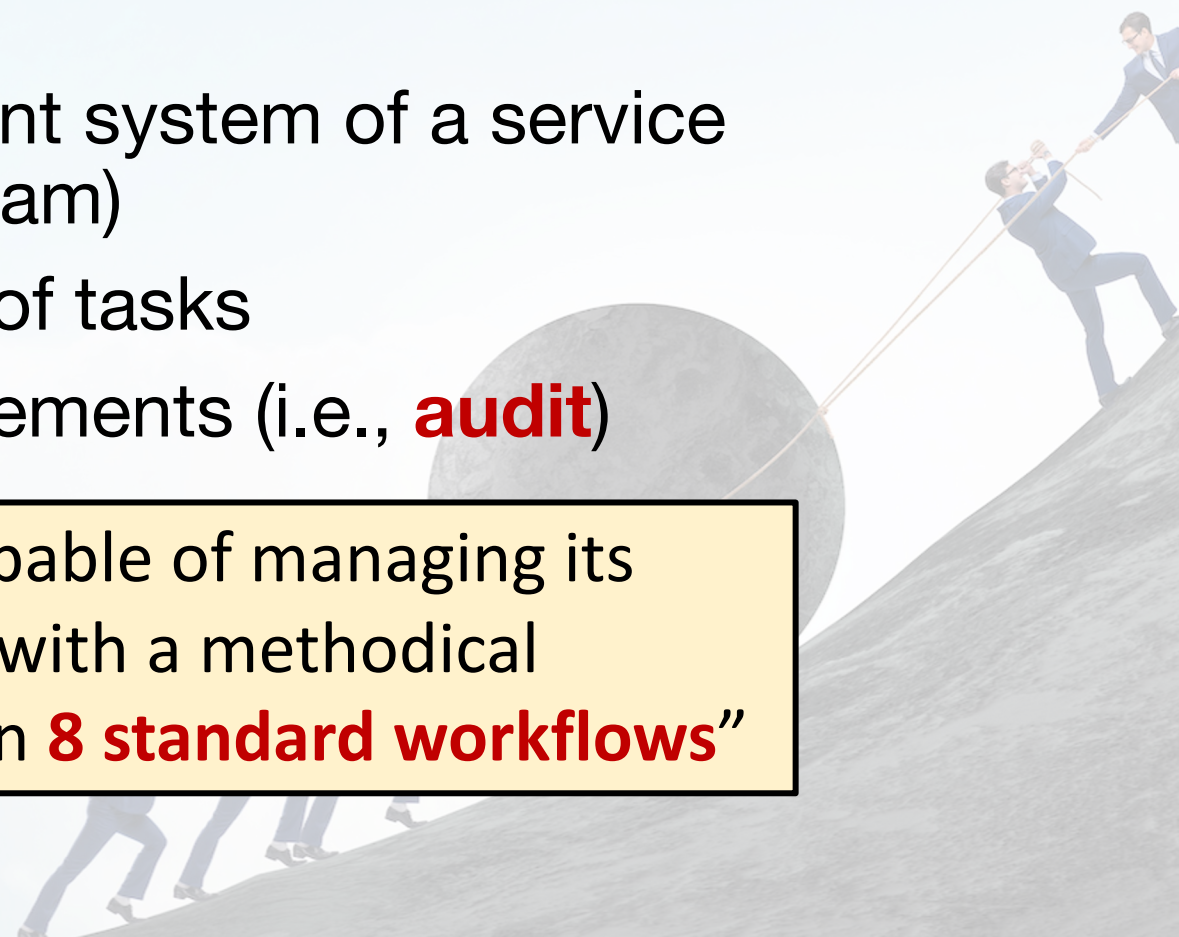
Transition & closure – USM handed off and treated as normal (i.e., routine) work



How to leverage the USM Method

- Use for **assessing** the management system of a service provider
- Use for **improving** the management system of a service provider (i.e., an organization or team)
- Use for determining **outsourcing** of tasks
- Use to test against external requirements (i.e., **audit**)

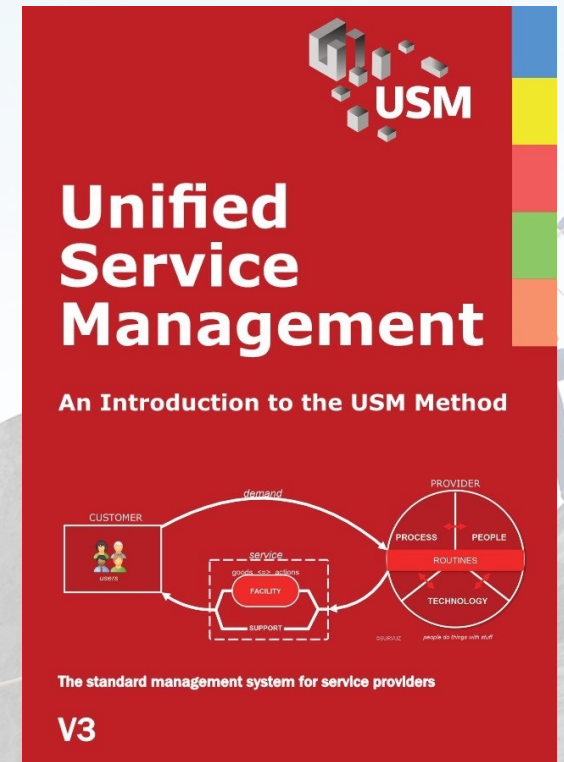
“Every service organization is capable of managing its **routines** and its **services** (ESM), with a methodical approach based on no more than **8 standard workflows**”



Other USM Resources


Registered USM users get access to a range of free USM resources (i.e., templates, guidance, USM repository, etc.)

- **USM Portal** - <https://usm-portal.com/?lang=en>
- **Introduction to USM Method** – On Amazon or via USM Portal subscription
- **In Control with USM Newsletter** – <https://www.linkedin.com/newsletters/in-control-with-usm-6909174250037743616/>




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Unified Service Management



John Worthington

Free 30 min Consult

🕒 30 min

📺 Web conferencing details provided upon confirmation.

Free 30 min Consult:

<https://calendly.com/mysvcmon/30min?month=2022-08>

- **NOW is the time to Re-Think ESM**
- **USM is SIMPLE - 5 processes and 8 standard workflows**
- **USM is a METHOD that can leverage ANY practice framework**
- **USM enables CUSTOMER-DRIVEN service delivery**
- **USM improves INTEROPERABILITY across service domains**

Key takeaways ... & questions?

"...in a turbulent world, there's another set of cognitive skills that might matter more: the ability to rethink..."

