



# Welcome!

Best Practice Transfer: An Approach to the  
Organizational Adoption of Best Practice  
and Continual Improvement

Marty Larsen, Microsoft

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  - ✓ ITIL Bridge – Foundation & Managers
  - ✓ ITIL Lifecycle, Capability and MALC
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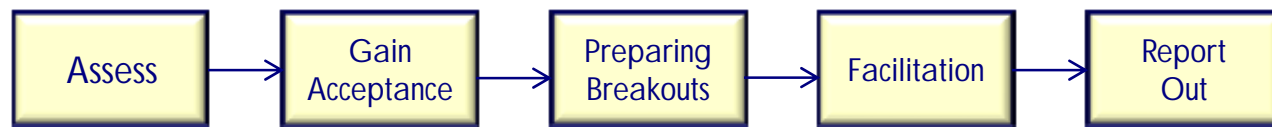
***Welcome!***

# Today's Agenda



To Do:

- Overview of the 5 Step Process for the Implementation and Transfer of Best Practices

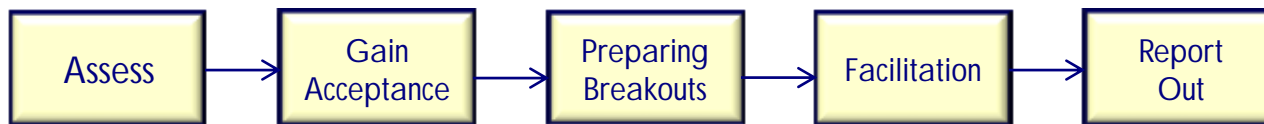


- Additional Detail
  - ✓ The five steps with additional data and examples.

Thanks for joining us today.  
Please use the chat feature to send in your questions.

# 5 Day Best Practice Transfer (BPT) Program

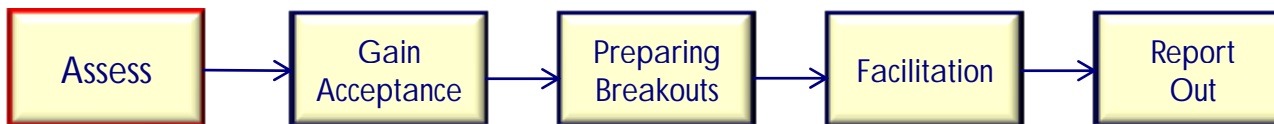
1. Assess Readiness for Change
2. Gain leadership and staff acceptance
3. Setting up breakout sessions
4. Facilitation of BPT Breakout sessions
  1. Start
  2. Scope and Objectives
  3. Problem and Analysis
  4. Development of Process flows
  5. Development of Consensus and Actions
  6. Report Out
5. Realizing the return on effort: The Report Out





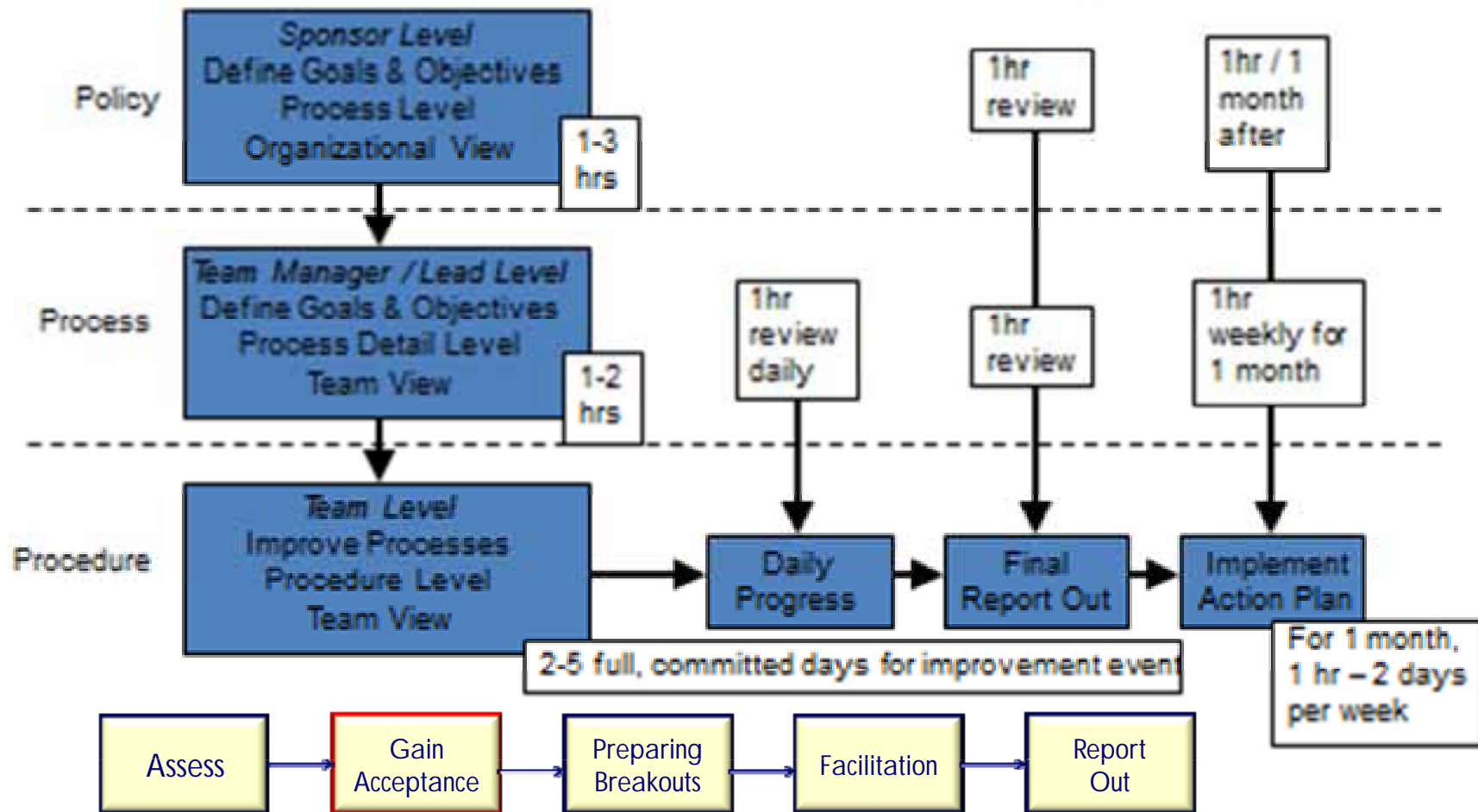
# Assess Readiness for Change

- Identify the Organizational Impetus
- Anticipate and Identify the Resistance to Change
- Assess Organizational Alignment
- Assess the Time Commitment



# Gaining Acceptance

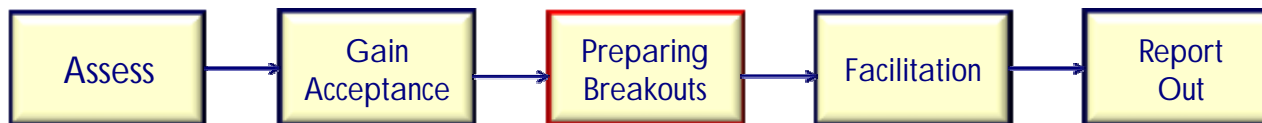
## Process Improvement Approach & Time Requirements



# Preparing Leadership and Staff

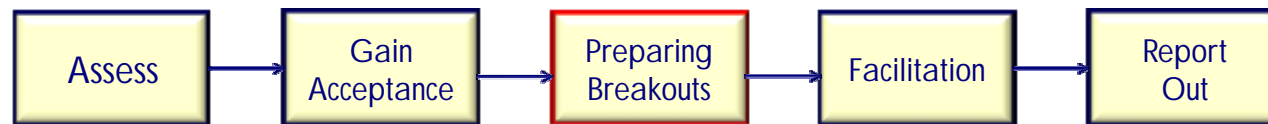
- Techniques for Overcoming Resistance to Change
  - ✓ Generate broad support and participation
  - ✓ Work with multiple levels of leadership
    - Policy, Process, Procedure
- Identification of Scope and Objectives
  - ✓ Scope Identification form and facilitation
  - ✓ Identify team members

Process Improvement Name	Scope (what areas to cover in current state, problem resolution, future state)
Problem Statement / Business Case (why we are here)	Goals / Objectives (specific targets that Process Improvement will achieve)
Process Sponsor	Event Team Members



# Preparing the Breakout Session

- Scheduling
- Room set-up
- Scope Doc
- Agenda
- Training
- Materials



# Overview of the BPT Breakout Session



Ground Rules  
Introductions  
Roles



*Define the Problem*



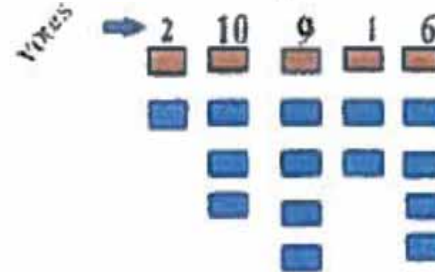
Brain Storm



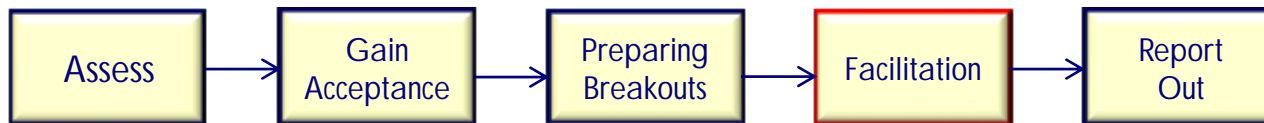
*Define "Headers"  
for Categories*



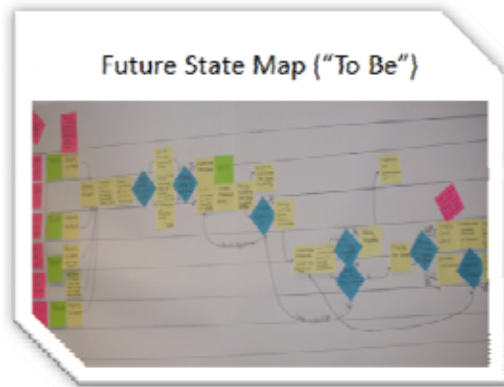
*Prioritize  
Categories*



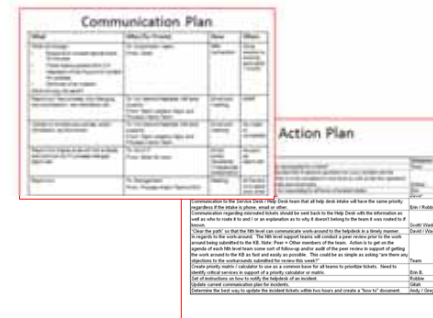
*"Fish Bone"*



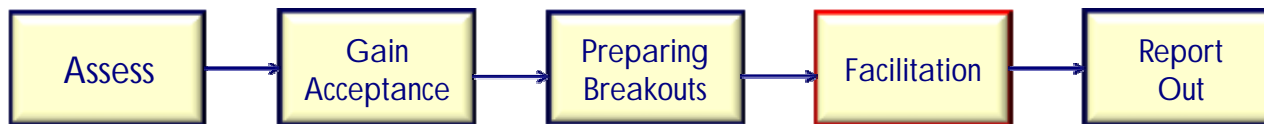
# Overview of the BPT Breakout Session



## Action and Communication Plans



## Report Out



[illegible]

# Detail

- Facilitator Preparation
- Assessment of Readiness
- Scoping
- Preparing for Breakouts
- Executing the Breakouts
- Reporting the Breakouts

Assess

Gain  
Acceptance

Preparing  
Breakouts

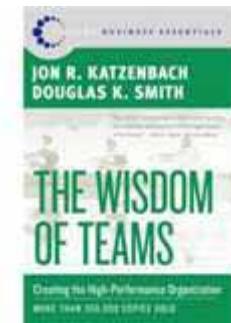
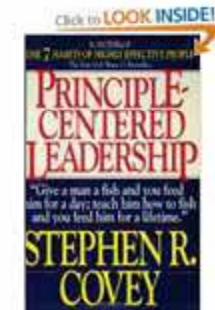
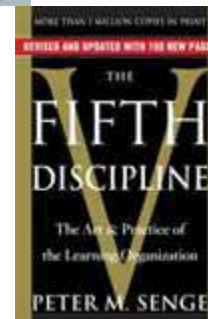
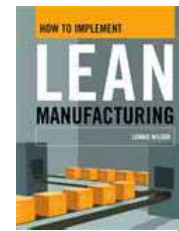
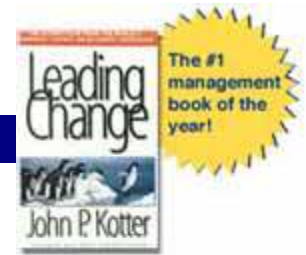
Facilitation

Report  
Out



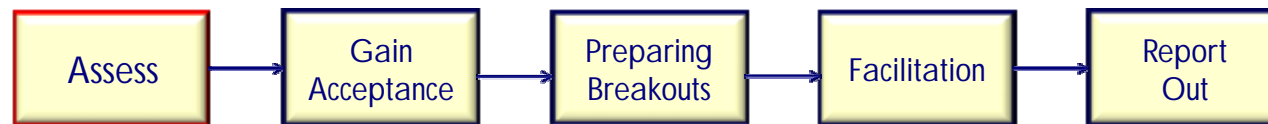
# Best Practice Transfer (BTP) Facilitator Preparation

- Psychology of a Breakout Session
  - ✓ Empowered teams and high-performing teams
  - ✓ Ownership of solutions
  - ✓ Team and organizational behavior
- Facilitation of a Breakout Session
  - ✓ The leaderless facilitator
  - ✓ The tools of the facilitator
- Objectives of a Breakout Session
  - ✓ Streamline decision making
  - ✓ Reduction of bureaucracy
  - ✓ Structured problem solving



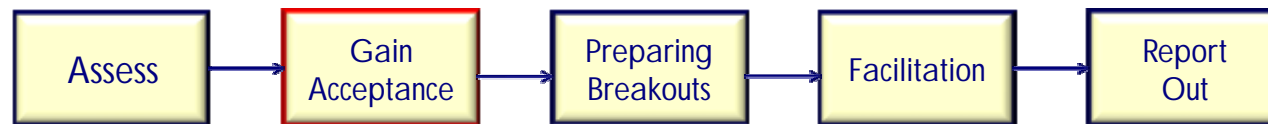
# Assess Readiness for Change

- Identify the Organizational Impetus
  - ✓ “Why do I care” and “Why do we need to change”
  - ✓ Assessment of current state maturity
- Anticipate and Identify the Resistance to Change
  - ✓ “Why we cannot change”
  - ✓ The psychology of cultures and individuals
- Assess Organizational Alignment
  - ✓ Is the organization aligned and set up for change?
  - ✓ What do we want to change?
  - ✓ How will we measure the change?



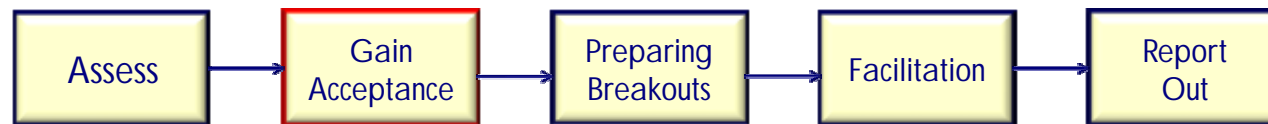
# Assess Readiness for Change Work Product

- Answer
  - “Why do I care” and “Why do we need to change ”
- Maturity Assessment (very high level)
  - Based on IO, CMMI, ISO20000 or other
- Past Resistance to Change and Past Efforts
  - Cultural barriers confronted
- Identify What is to be Changed
  - Behavior, work products, tools, reporting



# Scope Goals and Objectives

- Confirm the Effort (time) the Leadership Team is willing to Commit
- Confirm the Time the Leadership Team is willing to Commit to the breakout team members
- Confirm the Way in which the Time Allotted will be Communicated
- Agree on KPI's or Measurements



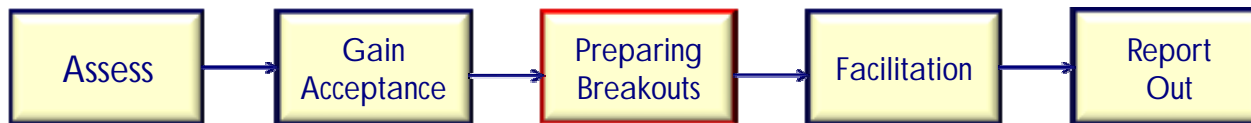
# Breakout Session Leadership Pre-Meeting

- Mini session of Q & A with the objective of having leadership fill out and agree on session's the "Scope and Objective"
- Prior to the leadership pre-meeting the facilitator may or may not send the Scope and Object form to the leaders

Process Improvement Name	Scope (what areas to cover in current state, problem resolution, future state)
Change Management Activities Intake and Logging	(Domain Level) Server Group
Problem Statement / Business Case (why are we here)	Goals / Objectives (Specific targets that Process Improvements will achieve)
<ol style="list-style-type: none"> <li>1. Request for change arrives via multiple intakes causing confusion and difficulty for planning and project management.</li> <li>2. Changes authorized for work and release into production are not visible to the Service Desk</li> <li>3. Leadership needs to know if the Server Team Change Management process is ready to be propagated to other domains.</li> </ol>	Consolidate and/or broker multiple change intakes
	Enable the service to see approved changes so that the SD may incorporate the information into their standard triage activity.
	Assess Server Team domain level change manager process and determine if level of maturity is enough to enable propagation.
Process Sponsor	Event Team Members
Tumar, S.	
Rob, Gabriel	
Nokia, Mike	

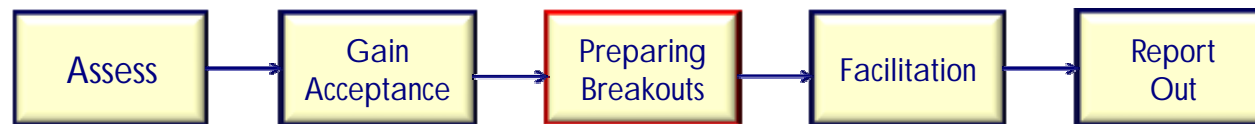
# Prepare for the Breakout Session

- Super Sticky Post-it Notes
- Name Tents or Name Tags
- Flip Charts (two or more)
- Roll of Butcher Paper
- Markers and Pens
- Leadership Pre-meeting Slides
- Candy | Horn
- Projector
- Posters
- Parking Lot and Job Assignments
- BPT Session Slides (specific to the session focus)



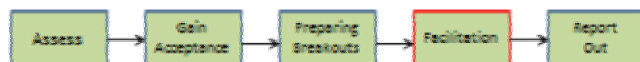
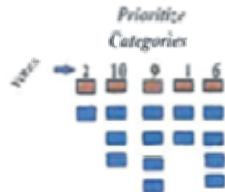
# Breakout Start

- Set up Room Appropriately
- Hang any Preprinted Material
- Handwrite Agenda and Post on Wall
- Invite Leadership to Kick Off Meeting
- Confirm the Appropriate Team is in Attendance
- Post "Check-in / Check-out" Form
- Post WO or Approval Number if Appropriate

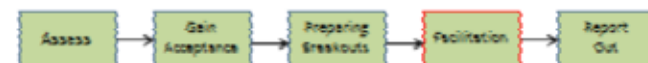
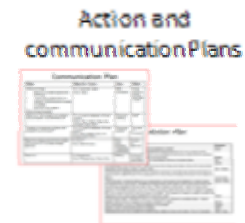
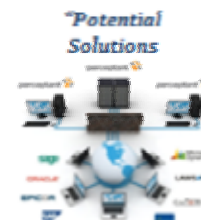
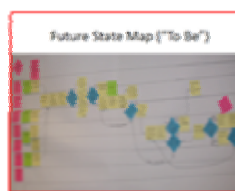


# The Breakout Session

## Overview of the BPT Breakout Session



## Overview of the BPT Breakout Session





# Breakout Session Agenda

## Agenda – Day 1

- Introductions
- Scope Review
- Training
- Current State Map
- Identify Issues
- Root Cause Analysis - Fishbones

## Agenda – Day 2

- Continue Root Cause Analysis - Fishbones
- Team Picture
- Identify Solutions
- Future State Map
- Sample Schedule

## Agenda – Day 3

- *Finalize Future State Map / Sample Schedule*
- *Action Plan / Impact Analysis*
- Team Name
- Communication Plan
- Control Plan – Metrics
- +/- Deltas

Ground Rules  
Introductions  
Roles



# Breakout Principles and Ground Rules

## Team Ground Rules

- Keep an open mind to change
- Maintain a positive attitude
- Never leave in a silent disagreement
- Create a blameless environment
- Treat others as you want to be treated
- One person, one voice—no position or rank
- There's no such thing as a dumb question
- Understand the process and Just Do It!

## Top 50 Creativity Killers

- Our place is different
- We don't have the budget
- It needs too much
- That's not my job
- They're too busy to do that
- We don't have the time
- Not enough data
- It's too radical a change
- The staff will never buy it
- It's against company policy
- The union will object
- That will run up our overheads
- We don't have the authority
- Let's get back to work
- That's not our problem
- I don't see the value
- It's not better than the current state
- We've been there before
- There's not the right time
- It won't fit the budget
- Don't touch my dog over there
- Good thought, but impractical
- Let's give it more thought
- We'll be the laughingstock of the industry
- Not that again
- Where's your data that says so?
- We did already without it before
- It's never been tried
- Let's not take any more of the bank's money for this
- Let's form a committee
- I won't look at our plans
- The executive committee will never go for it
- I don't see the connection
- Let's all sleep on it
- I won't be doing
- It's too much trouble to change
- It won't take the staff
- It's impossible
- I have a warning: why don't I and get fired
- We've always done it this way
- We'll lose money in the long run
- Don't touch the bank
- That's what we can expect from the staff
- How anyone else can think of it
- Let's look into it further
- We'll have to answer to the shareholders
- Good thinking
- I don't think, don't do it
- That's too much extra work
- It's too much work

## Ground Rules Introductions Roles



## Breakthrough Principles

- Clear objectives
- Team process
- Tight focus on time (3 days)
- Creativity before capital
- Quick & simple, not slow & elegant
- Necessary resources immediately available
- Immediate results (new process functioning by end of week)

# Top 50 Creativity Killers

1. Our place is different.
2. We tried that before.
3. It costs too much.
4. That's not my job.
5. They're too busy to do that.
6. We don't have the time.
7. Not enough help.
8. It's too radical a change.
9. The staff will never buy it.
10. It's against company policy.
11. The union will scream.
12. That will run up our overhead.
13. We don't have the authority.
14. Let's get back to reality.
15. That's not our problem.
16. I don't like the idea.
17. I'm not saying you're wrong but...
18. You're two years ahead of your time.
19. Now's not the right time.
20. It isn't in the budget.
21. Can't teach old dog new tricks.
22. Good thought, but impractical.
23. Let's give it more thought.
24. We'll be the laughingstock of the industry.
25. Not that again.
26. Where'd you dig that one up?
27. We did alright without it before.
28. It's never been tried.
29. Let's put that one on the back burner for now.
30. Let's form a committee.
31. It won't work in our place.
32. The exec. committee will never go for it.
33. I don't see the connection.
34. Let's all sleep on it.
35. It can't be done.
36. It's too much trouble to change.
37. It won't pay for itself.
38. It's impossible.
39. I know a person who tried it and got fired.
40. We've always done it this way.
41. We'd lose money in the long run.
42. Don't rock the boat.
43. That's what we can expect from the staff.
44. Has anyone else ever tried it?
45. Let's look into it further.
46. We'll have to answer to the stockholders.
47. Quit dreaming.
48. If it ain't broke, don't fix it.
49. That's too much ivory tower.
50. It's too much work.

# Scope Review

## Scope

Process Improvement Name	Scope (what areas to cover in current state, problem resolution, future state)
Problem & Incident Management	<ul style="list-style-type: none"> <li>- Any disruption of service (Disruption of service for end users to perform function they intend to perform, not enhancements)</li> <li>- All environments</li> <li>- N/A</li> </ul>
Problem Statement / Business Case (why we are here)	Goals / Objectives (specific targets that Process Improvement will achieve)
1. Customers are frustrated with service disruptions, response times to resolve incidents, and updates on status of incidents.	1. Reduce and eliminate service disruptions <ul style="list-style-type: none"> <li>- 80% of service disruptions are resolved within 1 hour during core business hour</li> <li>- All service disruptions are resolved within 1 business day</li> <li>- Incidents are reduced by 30% through elimination of problems</li> </ul>
2. IT is not able to prevent repeated, common service disruptions and therefore customers suffer service disruptions and IT must repeat incident resolution.	2. Improve communication to customers <ul style="list-style-type: none"> <li>- Customers are responded to within 30 minutes of reporting an incident</li> <li>- Communication plan developed for types of incidents</li> <li>- A single point of a contact (system or organization) determined for incident status and updates</li> </ul>
3. Critical incidents are not resolved faster than lower priority incidents.	3. Develop common IT understanding and tracking of incidents to resolution <ul style="list-style-type: none"> <li>- All incidents tied to outages</li> <li>- Incidents clearly and consistently defined, prioritized, and tracked</li> </ul>
4. Customers do not consistently report incidents to the same organization or system so recognizing major service disruptions, coordinating incident resolution, and communicating status and updates to incidents is challenging.	
Process Sponsor	Event Team Members
Jeff Green	1 DBA
Lloyd Towe	1 Server Build
Jerry Thompson	1 Storage
Bernard Butler	1 Network
	1 Domain Admin
	2 Client Services
	2 Helpdesk
	1 App / Exchange
	1 Center
	1 Access Control
	2 Voice / Video

## Scope Review

- NJI – NJI as it is today, helpdesk, servers, etc
  - Just a helpdesk issue or issues that go through them? No
  - Things that go through CRM? More than CRM, other systems too
- All environments – DMZs, Dev (3), Test (2), Prod (3), ... 15 environments
- Disruption of service
  - lost of application or other services
  - Something not working
  - Unplanned and planned outages
  - **OUT OF SCOPE** - Changes in environment that interrupt service – that is change management
- Updates of status – answers: when will it be resolved?
- Prioritization of incidents is ad hoc and down at the team lead
- 80% of incidents – PSTs, passwords, simple fixes
- Resolved? – service is working from customer's view
- 1 hour – when does the clock start? When first reported by customer
- IT OF SCOPE** – Event monitoring and noise
- "All" incidents within 1 business day
  - Excludes power outages, digging out network, act of God, outside IT resolution
  - Excludes others in IT's control – tapes offline, failure of low-available system, permission fix
    - Most are enhancements and not incidents
- Need a definition of an Incident
  - Incident – Any disruption (planned or unplanned)
- Customer / User notification
  - acknowledgement of incident
  - notify users of outage
- Communication Plan – WHO to contact, how, and what triggers it
- Single point of Contact
  - Who does anyone call (helpdesk, customer, etc) to get updates
- Common IT understanding
  - Repeatable
  - All of IT does it the same way
  - For prioritization, process, reporting, tracking, and definition
- All incidents are documented and tracked
  - Outage has CMS ticket tracked against the incident
  - Emergency with lesson's learning and root cause analysis
- IT users impacted or could impact (found by tools before users)

## Define the Problem



# Training

- Value Discuss
- Cause and Effect
- Test for Value

## Maximize the Value Activities



## Cause and Effect

➤ Cause & Effect or Fishbone diagrams allow teams to brainstorm & discover issues. Categories typically explored:

For Manufacturing

- Manpower
- Methods
- Materials
- Machinery

For Support or Service Functions

- Equipment
- Policies
- Procedures
- People



## 1. Test for Value Added



Imagine the production process for making eyeglasses.

Product Routing – Eyegless Manufacturee

10	Mold frame and temples
20	Transport to Quality Control Department
30	Inspect frame and temples
40	Sort and stack frames and temples
50	Fire polish frames
60	Print product name on frame
70	Transport to storage
80	Store in primary stock bin
90	Pick frames and temples
100	Transport to Final Assembly
110	...

- Which steps are value added?
- Which steps are non-value added?
- How can you tell the difference?

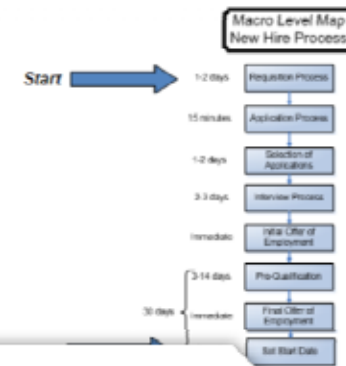
## Define the Problem



# Training

- Process Diagrams (Macro)
- Process Diagram (Swim)
- Cause and Effect
- Best Practice Definitions Specific to the Focus of the Breakout Session

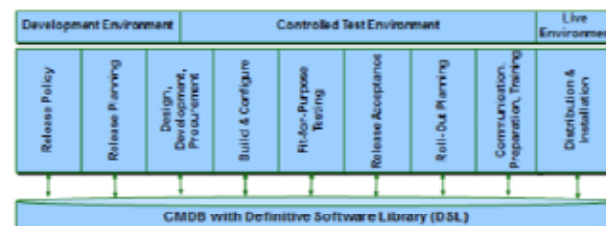
## Create Macro Level Flow of Process



## Develop Swim Lanes and Detail the Steps



## Major Activities of Release

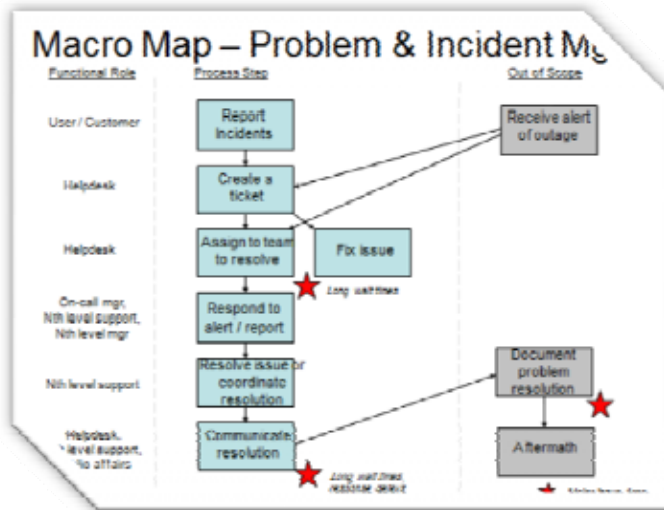
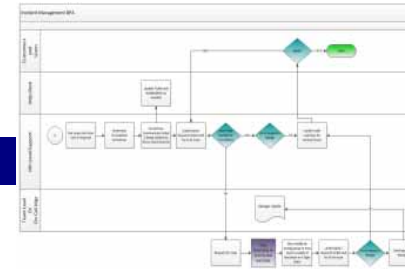


## Define the Problem



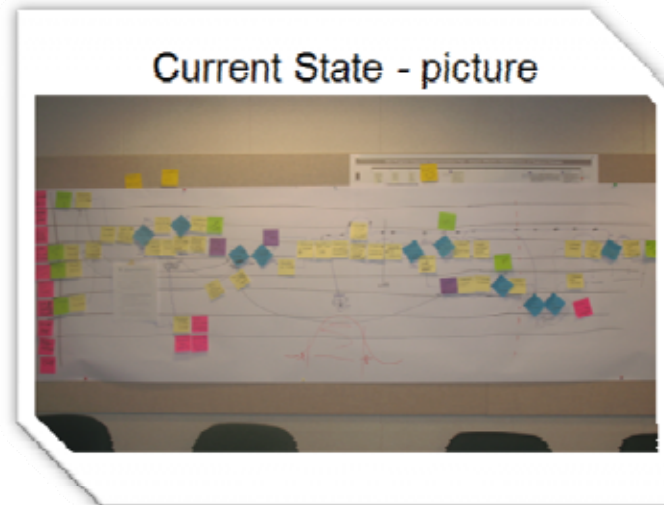
# Macro and Current State Map

*"As Is"*



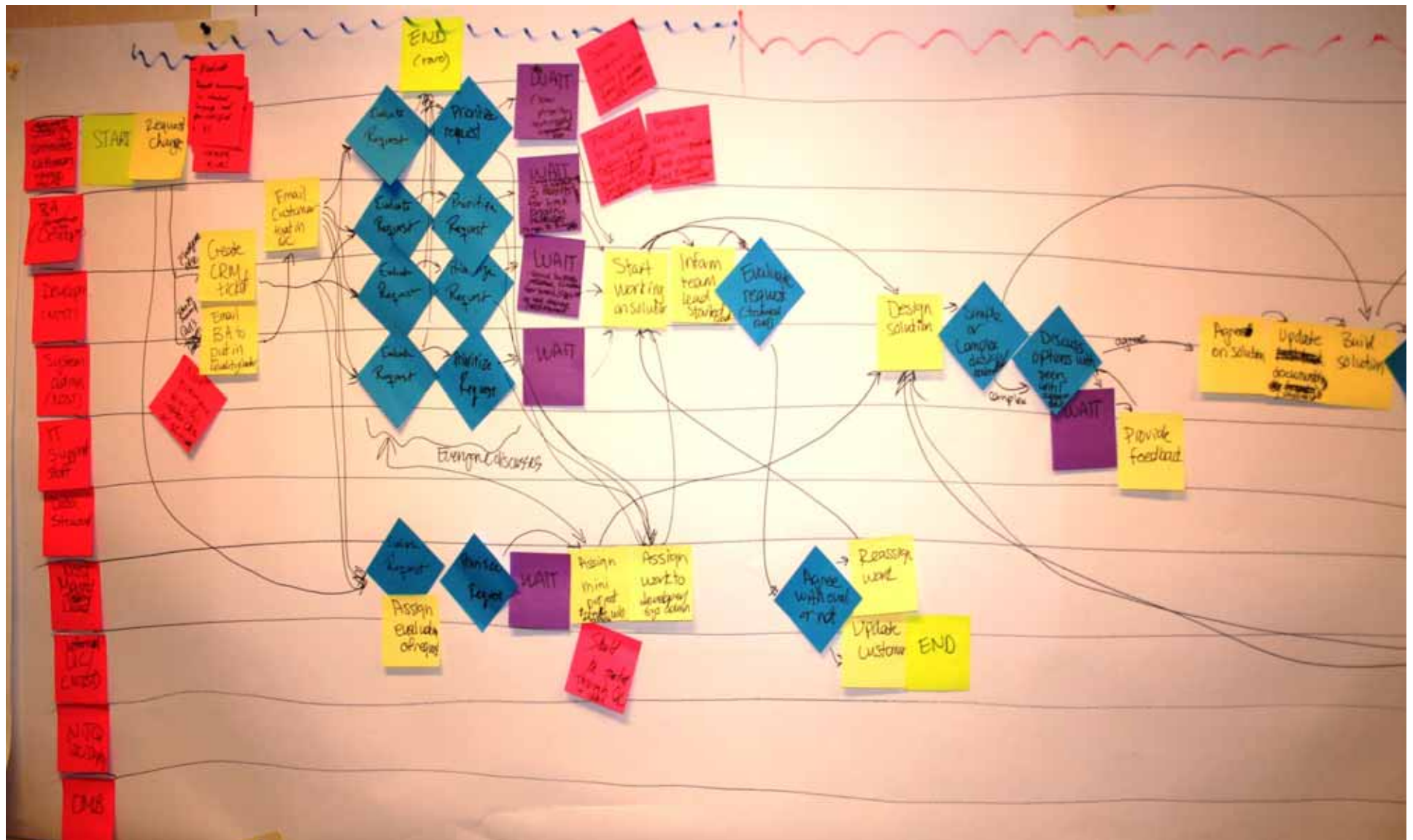
For psychological reasons the current state map is built to be ugly and the facility wants to promote the ugliness

Keep the noun verb flow going  
Do lots of goofy little things such  
as "gold Star"





# "As Is"





# Identify Issues

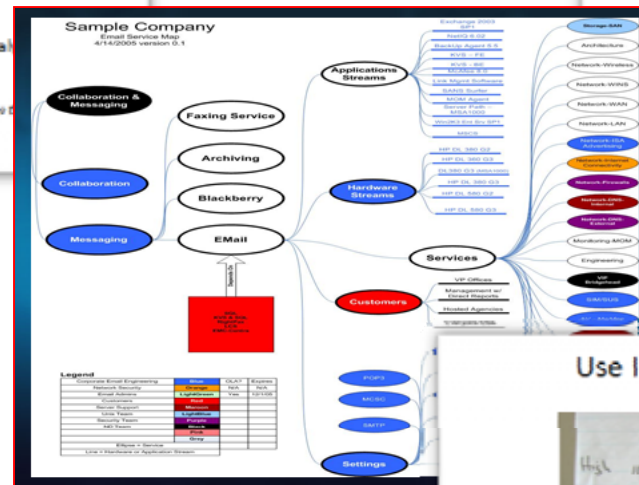
## Group Brainstorming Process

- Follow the four basic brainstorming rules
  - All ideas are good ideas
  - One idea per note
  - No critical judgement
  - Quantity over quality
- Review ideas and clarify
- Combine and rephrase similar ideas
- Evaluate and prioritize ideas
  - Create Affinity diagram and perform Impact Difficulty Analysis
- Select top 3 to 5 ideas for further investigation
  - These should ideally be ideas that are of high impact, low difficulty



## Initial Problem Brainstorming

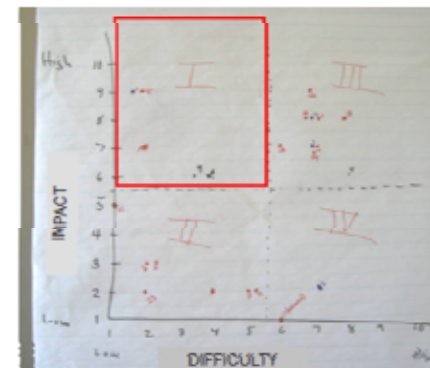
- Tools Don't Work
- Teams need training
- No communication between functional teams
- Change mgt is too complicated
- No Ldr. Support
- Next level teams do not think they need to do support
- We do not have the time to open a ticket for EVERY request



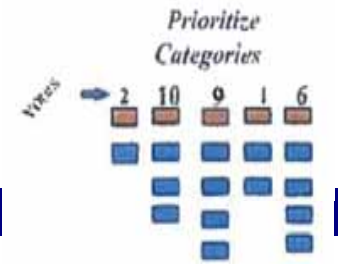
## Brainstorm Problems/Barriers



## Use Impact / Difficulty Matrix



# Prioritize the Issues Team Votes



- Look at the Scope and Objectives Document
- Attempt to Quantify
- Refer to the Value Stream (training)
- Look for the Waste (training)
- The 80/20 Rule
- Impact vs. Effort (training)
- Time Allotted
- The 3 "yes(s)"

# Root Cause Analysis

## Define the Problem



### Cause and Effect

- Cause & Effect or Fishbone diagrams allow teams to brainstorm & discover issues. Categories typically explored:

#### For Manufacturing

- Manpower
- Methods
- Materials
- Machinery

#### For Support or Service Functions

- Equipment
- Policies
- Procedures
- People



### Associative RCA Map



### The Stepladder Technique

**Step 1:** Before getting together as a group, present the task or problem to all members. Give everyone sufficient time to think about what needs to be done and to form their own opinions on how to best accomplish the task or solve the problem.

**Step 2:** Form a core group of two members. Have them discuss the problem.

**Step 3:** Add a third group member to the core group. The third member presents ideas to the first two members **BEFORE** hearing the ideas that have already been discussed. After all three members have laid out their solutions and ideas, they discuss their options together.

**Step 4:** Repeat the same process by adding a fourth member, and so on, to the group. Allow time for discussion after each additional member has presented his or her ideas.

**Step 5:** Reach a final decision only after all members have been brought in and presented their ideas.

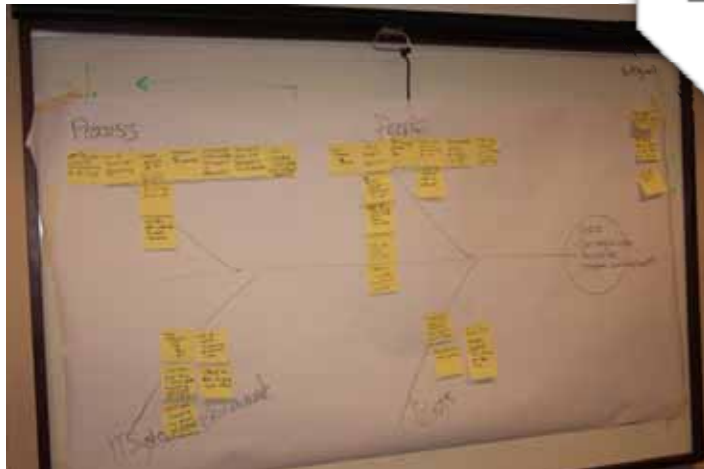


### Five Why's

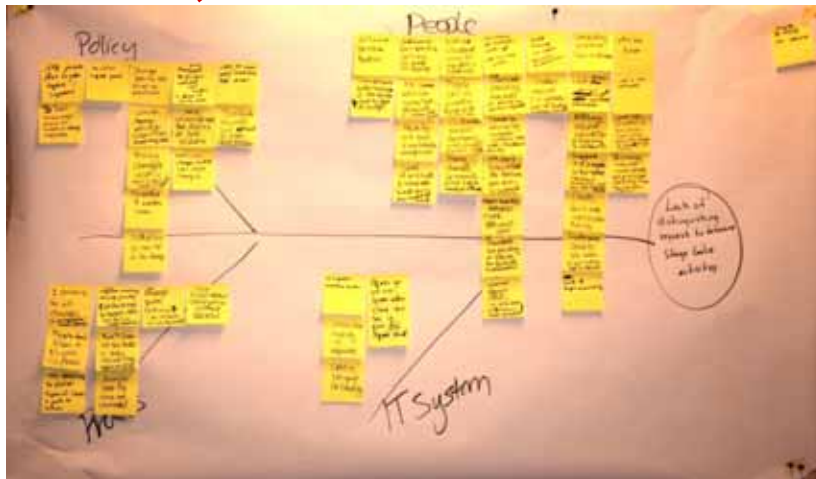
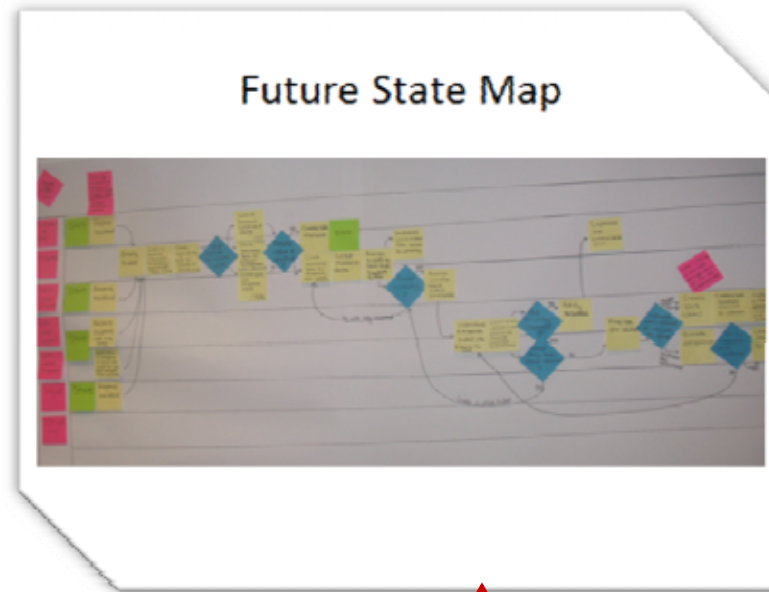
#### • Problem Statement:

- You are on your way home from work and your car stops in the middle of the road.

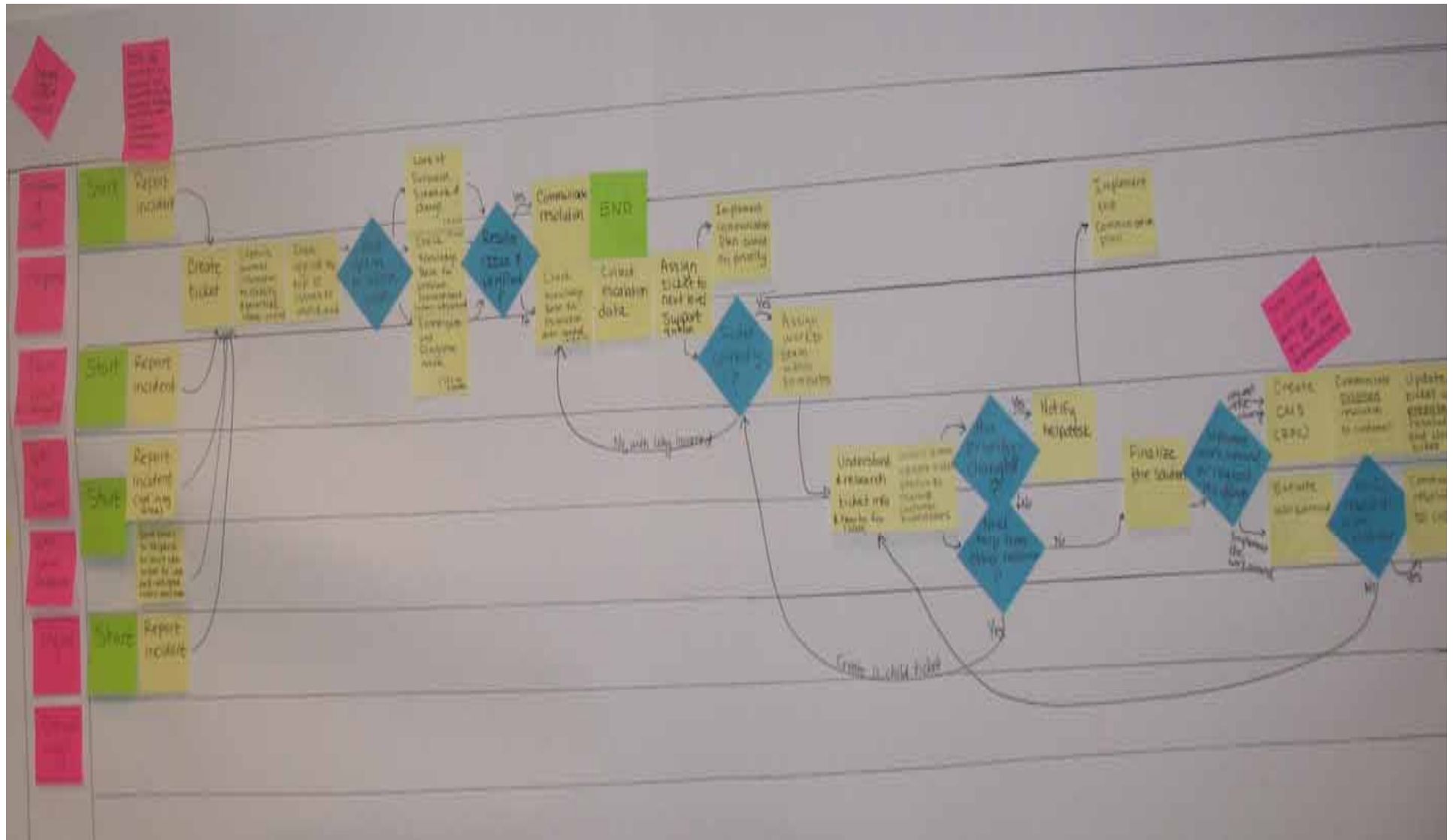
1. Why did your car stop?  
– Because it ran out of gas.
2. Why did it run out of gas?  
– Because I didn't buy any gas on my way to work.
3. Why didn't you buy any gas this morning?  
– Because I didn't have any money.
4. Why didn't you have any money?  
– Because I lost it all last night in a poker game.
5. Why did you lose your money in last night's poker game?  
– Because I'm not very good at "bluffing" when I don't have a good hand.

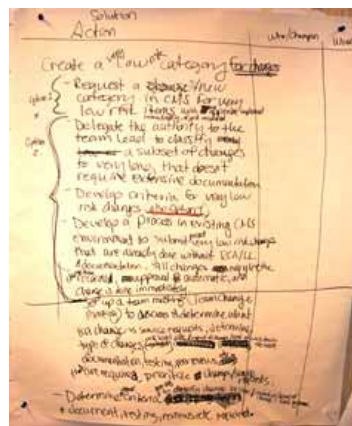


# Future State "To Be" Map



# Future State Map ("To Be")



[illegible]



# The Action Plan

## Action Items

The goal of our action items is that all action items can be achieved in less than 30 days, and a "YES" for two of the three following questions:

- Is it good for the organization?
- Is it good for the team?
- Is it good for the individual performer?

Action Required	Who/Champion	When
Model classification - add priority, change name from 'date applied' to 'release date'	Gabe	
Change systems/servers impacted to be drop down (services)	Gabe	
Add sanity check in change logging system for approval of changes - can be done by team lead or peer.		
Service desk looks at upcoming changes (also helps with proper escalation and request that some changes not be done) and include that into their triage process; view that meets their needs	Aura and Gabe	
Every change should have a back out option when applicable	Gabe	
Services should be a drop down - need some thinking and discussion (needs both client name and tech name); ask user for their names for services; need agreement on name (drop word impacted) services list to be generated by service desks (students)	Gabe and Aura	
New hardware - spend focused time with new employee to help save time overall; need to convince business unit to allocate time	Steve	
Top ten review and allocate resources to solve issue if deemed a problem	Gabe	
Set up problem management meeting	Gabe	
Problem management artifacts and agenda	Marty	6 Dec
Apply priority matrix to known issues and see how it turns out; spawn RFC from this once root cause analysis is determined	Linda and Steve	
Include review of known issues + problem mgmt. database + kb as part of the triage process (after looking at top 10, changes list)	Linda and Steve	
Escalated items: when it gets picked up, estimated fix time needs to be provided within 5 minutes	Gabe	
Service desk escalates issues internally the same as externally. Escalation within a group should follow the same standards as escalation to another team.	Linda and Steve	
Override of specific tickets. CSR will follow STS approach - everyone looks at all tickets and takes next in queue, not their specific ticket. A combo of auto and override is likely the appropriate approach.	Linda and Steve	
Use a team calendar & tasks for service requests (like projector requests, loaners); resolve the ticket and create additional supporting entries or other technique that precludes the need to keep a service ticket open.	Linda and Steve	
Change auto-email response in ticket system to include hours of operation and to help set expectations	Linda and Steve	
Need to define model (standard, normal, emergency), type/category (minor, major, significant), priority (low, med,	Gabe and Kumar	

# What Needs to be Communicated

- What is the intended purpose / action?
- Who is the intended audience?

Communication Plan			
What	Who (To / From)	How	When
What will change: <ul style="list-style-type: none"><li>• Respond to incident reports within 30 minutes</li><li>• Ticket status update within 2 hr</li><li>• Helpdesk will be the point of contact for updates</li><li>• Definition of an incident</li></ul> What will stay the same?	To: Customers / users From: Gitah	BPA connection	Once solution is working, estimated 1 month
Report out: New process, why changing, new prioritization, new definitions, etc	To: NJI teams (Helpdesk, Nth level support) From: Team Leaders, Mgrs, and Process Improv Team	Email and meeting	ASAP
Update on procedures, policies, action completion, etc from event	To: NJI teams (Helpdesk, Nth level support) From: Team Leaders, Mgrs, and Process Improv Team	Email and meeting	As made or completed
Report Out (higher level with link to detail) and common (to IT) process changes approved	To: All of IT From: Gitah for Larry	Email, portal, newsletter, IT leadership presentation	As soon as approved
Report out	To: Management From: Process Improv Team or Erin	Meeting	At the end of event or soon after



# RACI if Applicable

	User Departments	Business Analysis/ Applications Development	Operations Acceptance/ QA	Service Management/ Change Control	Service Delivery	Capacity Planning
Define business requirements roadmap	AR	C				I
Define IT strategy roadmap	C	AR	C	C	C	C
Define IT release calendar	C	AR	I	C	C	C
Aggregate business & technical development requests	C	AR	I	C	I	C
Prioritise requirements and schedule to target release	C	AR	I	C	I	C
Define specific components for next release	C	AR	I	C	I	C
Develop release components	I	AR		I		
Complete unit test/ system testing	I	A	R	I		
Assemble target release components	I	I	AR	C	C	C
Confirm QA requirements met	C	I	R	A	I	
Confirm Operations Acceptance criteria met	I	I	R	A	I	
Authorise risk and contingency arrangements	C	C	R	A	C	I
Define implementation plan	C	C	R	A	C	I
Authorise GO/ NO GO decision	C	C	C	AR	C	C
Execute implementation	I	C	C	A	R	
Manage post-implementation	I	I		A	R	R
Complete post-implementation review	C	C	C	AR	C	C
Confirm business value realised for release	AR	I				
Deliver service within service level agreements	C			I	AR	

# RACI

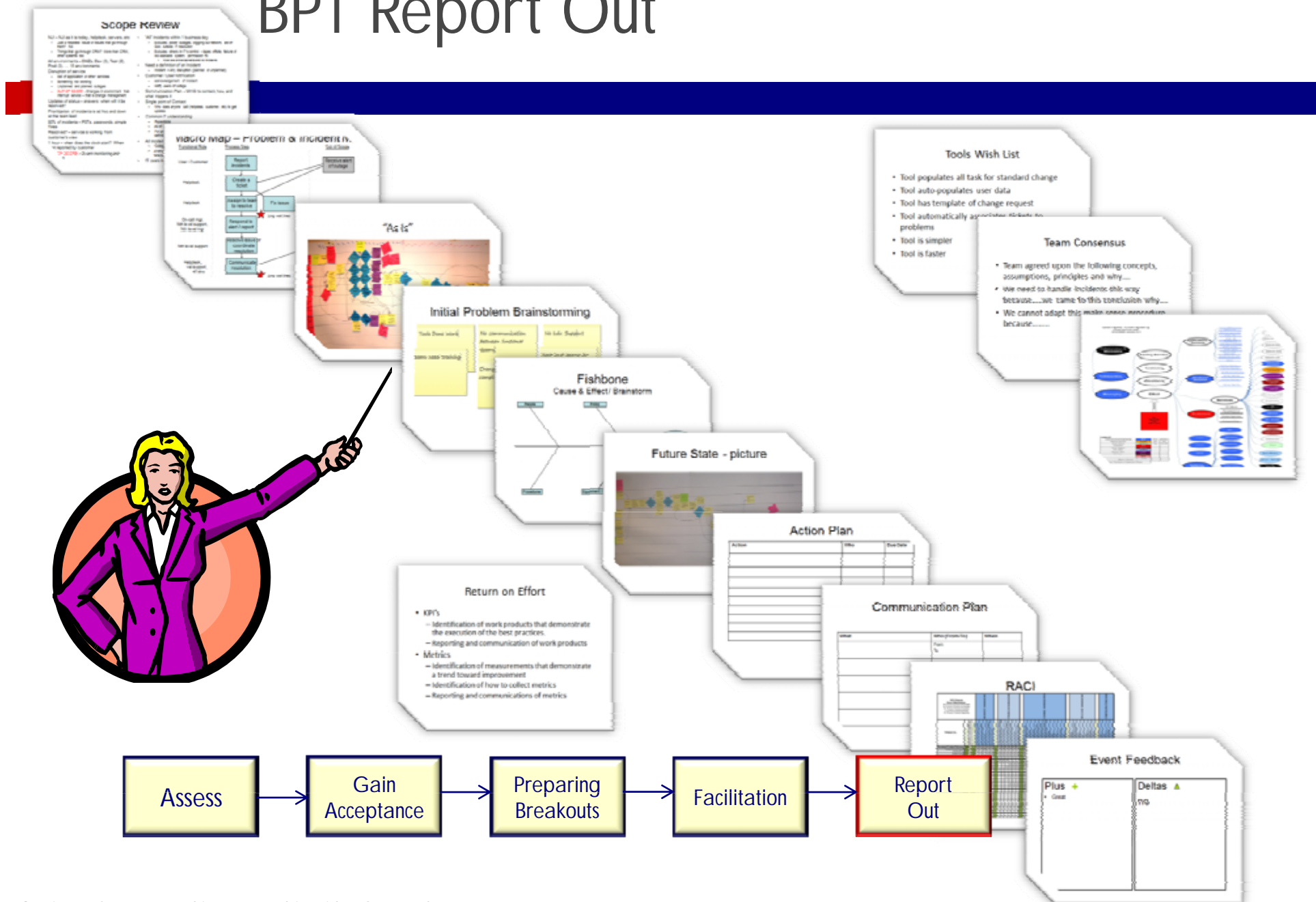
- We Must know who is Accountable
- We Need to know who is Responsible and When
  - ✓ What process am I supporting when? What hat to wear when (Responsible)



# Metrics Plan

What	How to Measure	Target or Direction
Cycle time to resolve incidents (at the end of incident management). E.g.	Ticket time stamp in CRM from open to closed	Target: 80% closed within 1 hr ~100% tickets closed in 24 hrs
# of knowledgebase updates (submissions) to problem management	Capture baseline and count after that	Increased
# of incidents resolved by knowledge base	Low-tech solutions	Increased
# of tickets updated within 2 hrs by Nth level support	In CRM	Increase, Target 100%
# of tickets assigned to team lead or delegate	In CRM	Target: within 30 mins for 100%
# of tickets assigned to group queue for incidents reported to the Helpdesk	In CRM?	Target: within 15 minutes for 100%
# of customers responded to by Helpdesk within 30 minutes for all intake (phone, voicemail, email)	From survey	Target: 100%

# BPT Report Out



# BPT Breakout Session Report Out

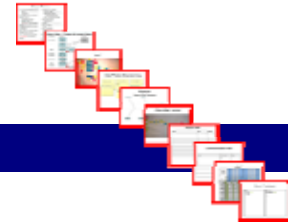
Report Out



- Consensus on a Shared Need (Scope)
- Consensus on a Vision for Success (Scope Review)
  - ✓ Modification or adoption of Scope and Objective worksheet
- Consensus on Current Process
  - ✓ "As Is" Macro diagrams
  - ✓ "As Is" Rommler Brache diagrams
- Consensus on Goal of Current Process
  - ✓ Introduction of best practice definitions (ITIL/Industry)
- Consensus on Responsibility(s) of Current Process
  - ✓ RACI diagram

# BPT Breakout Session Report Out

Report Out



- Identification of Value-add and Wasted Efforts
  - ✓ Maximize value
  - ✓ Reduce the 8 aspects of waste
- Consensus on “Should” or “To Be” Diagram
- Consensus on Good Practices in Need of Adoption
  - ✓ Introduction of good practices at the activity level
- Consensus on Actions Required to Adopt Good Practices
  - ✓ Codification of actions required to incorporate and sustain good practices
- Consensus on KPIs and Metrics
  - ✓ Identification of business analyst for collection of metrics

# Leadership Report

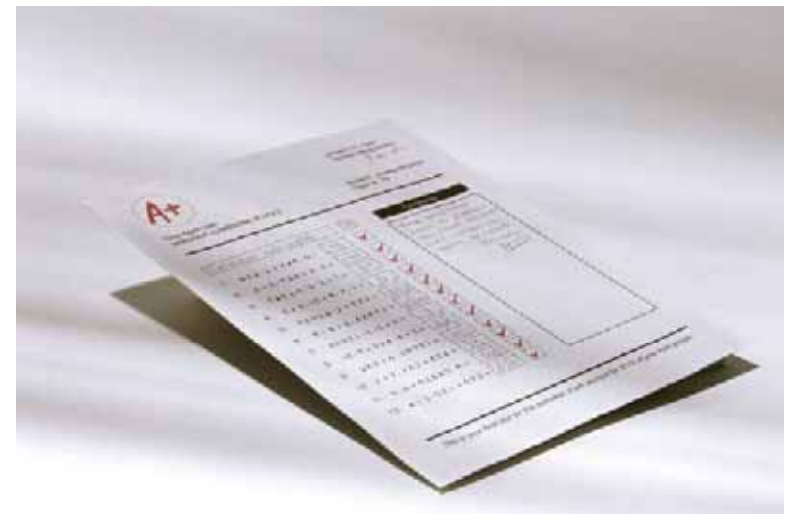
*Report-Out  
Decisions  
Action Plans*



- Each Day of the Breakout Session Should End with a Report to the Sponsoring Leadership
  - ✓ Cover the agenda items that were completed
  - ✓ Highlight and conceptual challenges the team may have had
  - ✓ Cover the scope review exercise, clarification of definitions, points of confusion
  - ✓ Cover all of the work products created by the team
    - Diagrams, issues list, etc
  - ✓ MOST IMPORTANT – cover any and all issues around managing the expectations of the leadership team
    - Reset or re-negotiate expectations as necessary
  - ✓ Cover the end of day report at the beginning of the next team breakout session

# Leadership Report

- Report to Team any Leadership Feedback
- Cover with Team the Work Products Already Developed
  - ✓ Validate the “As Is” process map
  - ✓ Validate the “To Be” process map
  - ✓ Validate issues identified
  - ✓ Validate RCA's completed





# Return on Effort



- KPI's
  - ✓ Identification of work products that demonstrate the execution of the best practices.
  - ✓ Reporting and communication of work products
- Metrics
  - ✓ Identification of measurements that demonstrate a trend toward improvement
  - ✓ Identification of how to collect metrics
  - ✓ Reporting and communications of metrics



# ITSM Academy Affiliates

