Microsoft Operations Framework MOF 4.0
A Comprehensive IT Service Lifecycle

Jerry Dyer
Senior Program Manager
Microsoft Operations Framework
Microsoft Corporation

www.microsoft.com/mof

About ITSM Academy

- Accredited ITSM Education Provider
  - ✓ ITIL® Foundation (V2 and V3)
  - ✓ ITIL® Foundation Bridge Course
  - ✓ ITIL® Practitioner, Service Manager, SM Bridge
  - ✓ ISO/IEC 20000 Certifications
  - ✓ Practical Workshops
- PMI Global Registered Education Provider
- Public Training Centers in Ft Lauderdale & Dallas
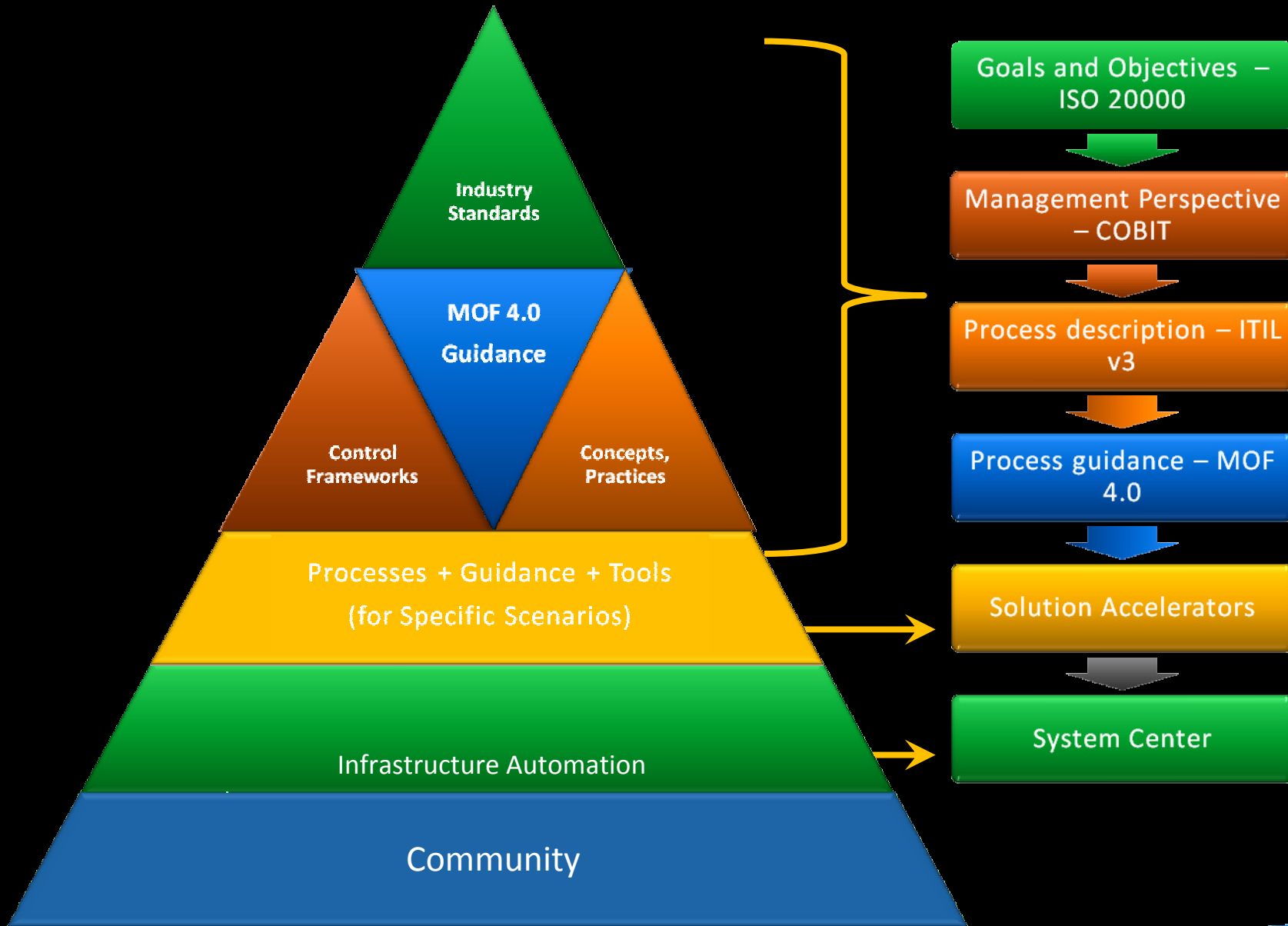- Corporate on-site Classes
- Tens-of-Thousands Trained since 2003

MOF 4.0 Supports the IT Organization to Deliver Efficient and Effective IT Services

The IT pro breathes easier, the organization gains an edge

IT Directors and CIOs
- A common framework for the entire organization
- Clear outcomes to ensure organizational focus
- Baked-in support for Governance, Risk, and Compliance

IT Managers
- Question format facilitates focused decision making
- Accountabilities and controls ensure quality
- Explicit examples and best practices quicken adoption

IT Professional
- Activity tables ease implementation and provide consistency
- Complimented by Solution Accelerators for specific scenarios
- Community to support relevant and emerging needs

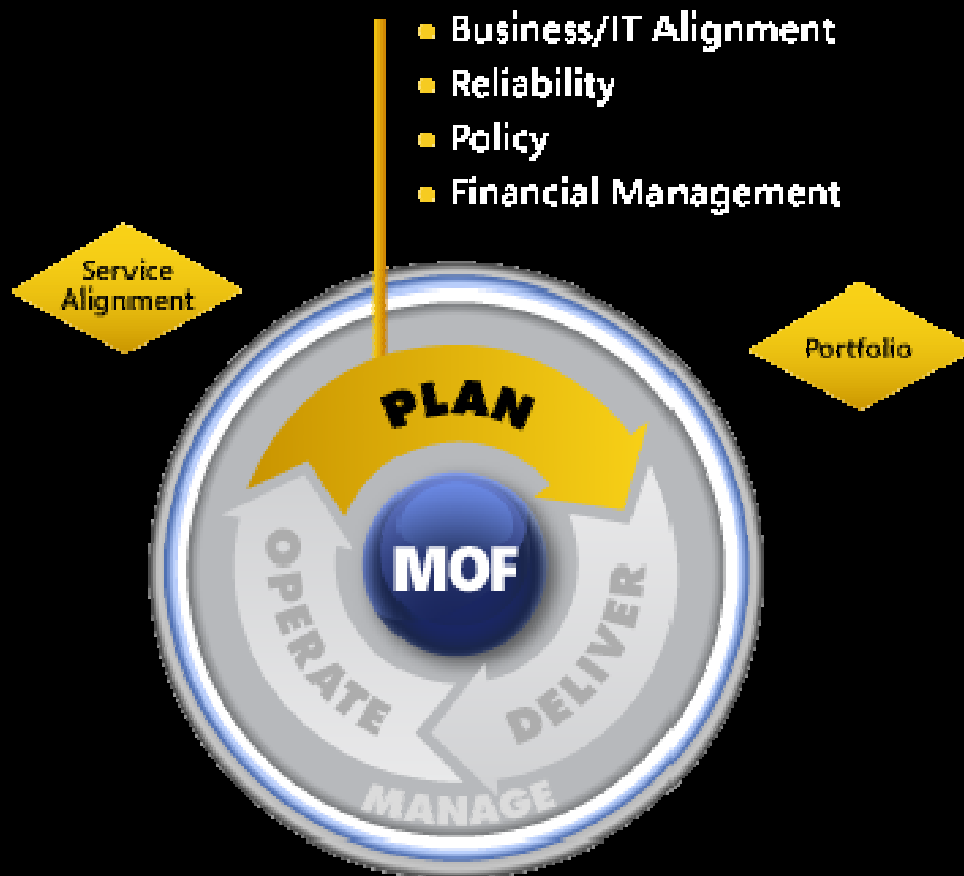# MOF 4.0 Connects Service Management Standards to Practical Application for Community

MOF 4.0 is Designed to be Practical, Understandable, Concise

- Phases describe goals, activities, accountabilities
  - What should the phase accomplish?
  - What general objectives and controls should be considered?
  - Who is involved?
- Service Manage Functions, (SMFs) offer the details
  - SMFs map to major activities in phases
  - Focus on what to do and how
- Management Reviews are integrated in the phases
  - Provide checkpoints
  - Identify areas for improvement

Plan SMFs

The Plan Phase provides guidance on how to plan for and optimize
an IT service strategy

- Business/IT Alignment
- Reliability
- Policy
- Financial Management

Service Alignment

Portfolio

PLAN

MOF

OPERATE

DELIVER

MANAGE

Business/IT Alignment Includes:
- •Service Strategy
- •Service Mapping
- •Demand Management
- •Portfolio Management
- •Service Level Management

Reliability Includes:
- •Capacity Management
- •Continuity Management
- •Confidentiality Management
- •Integrity Management
- •Availability Management

Policy Includes:
- •Security
- •Privacy
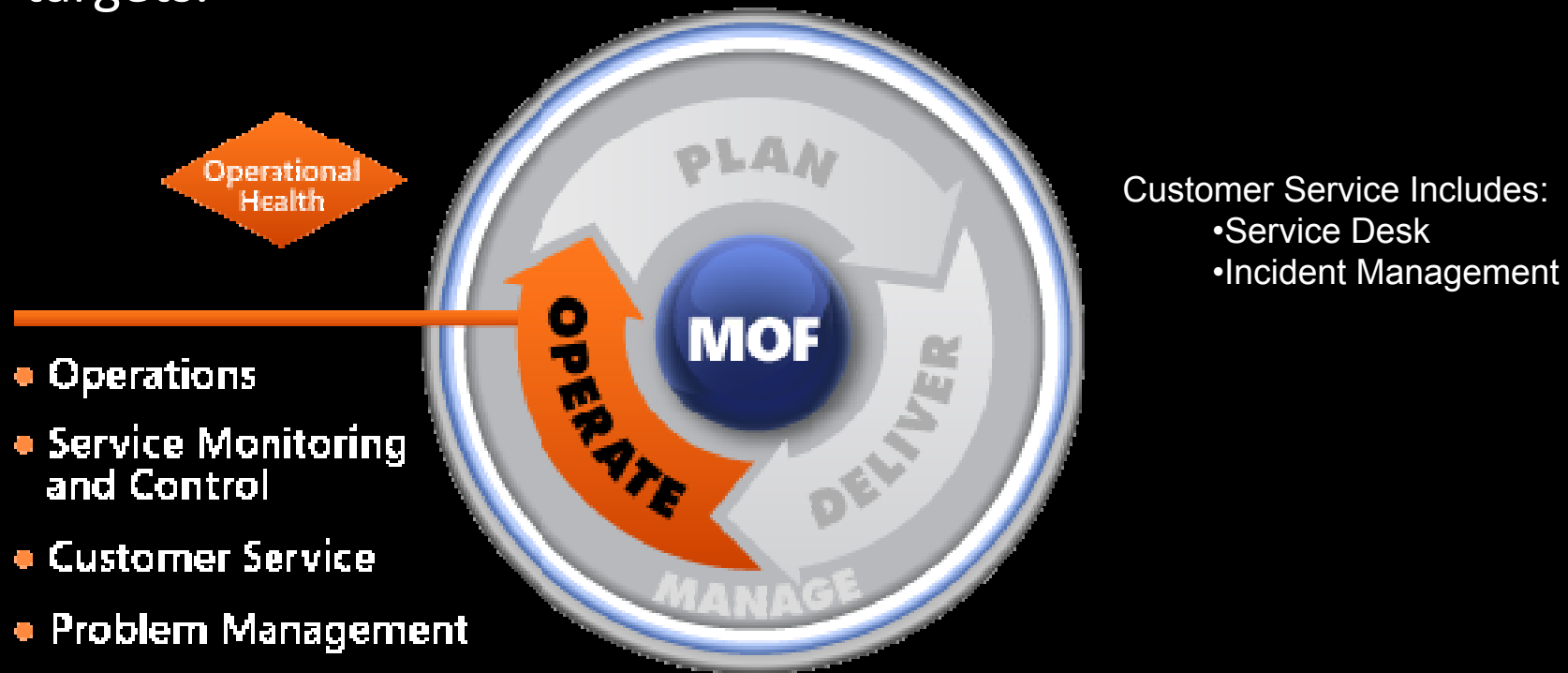- •Appropriate Use
- •Partner
- •Asset Protection

Deliver SMFs

The Deliver Phase helps IT professionals more effectively design and deliver IT services, infrastructure projects, or packaged product deployments.
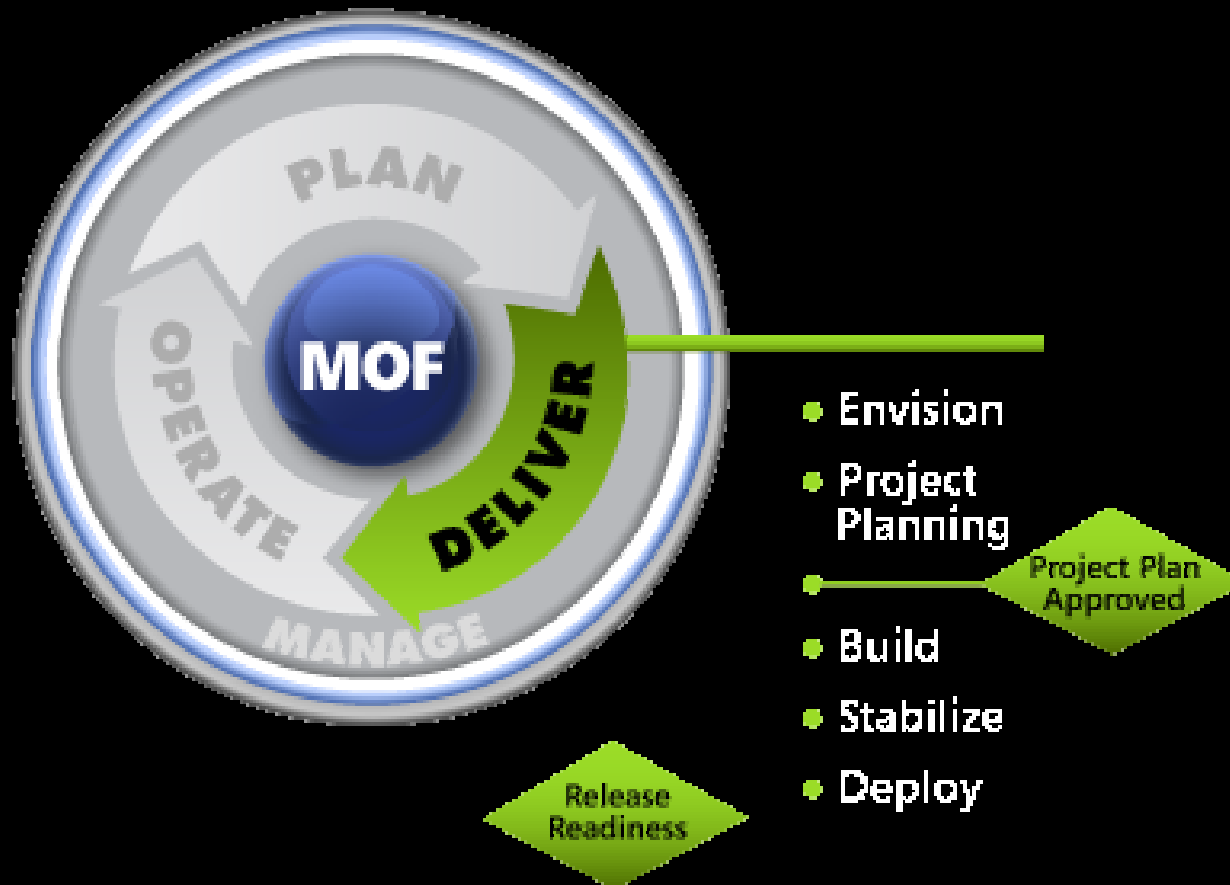
Operate SMFs

The Operate Phase helps IT professionals efficiently operate, monitor, and support deployed services in line with agreed-to service level agreement (SLA) targets.

Operational Health

- Operations
- Service Monitoring and Control
- Customer Service
- Problem Management

PLAN
OPERATE
MOF
DELIVER
MANAGE

Customer Service Includes:
- Service Desk
- Incident Management

Manage SMFs

The Manage Layer establishes decision-making processes and the use of risk management, change management, and controls throughout the IT service lifecycle

- Governance, Risk, and Compliance
- Change and Configuration
- Team

Governance, Risk, and Compliance

- Deliverable
  - IT objectives achieved, change and risk managed and documented
- Purpose
  - Support, sustain, and grow the organization while managing risks and constraints
- Outcome
  - IT services are managed to achieve the business strategy and objectives

GRC Integrated in Lifecycle Phases

GRC Elements	Plan	Deliver	Operate
Objectives	Services are valuable, predictable, reliable, and cost-effective. Responsive to ever-changing business needs.	Services are developed effectively, deployed successfully, and ready for Operations.	Services operated, maintained, and supported in line with the SLA targets.
Accountabilities	Management Service	Solutions	Support Operations
Key Focus	Strategy transfer. Governance structure and decision rights. Management objectives. Policy defined.	Solution architecture addresses requirements. Project stakeholders, risks, mitigations. Defining controls and procedures.	Procedures and control activities. Recording and documentation. Retention of evidence that controls operate as designed.
Controls	Service Alignment Portfolio	Project Plan Approved Release Readiness	Operational Health

*SAMPLE CONTENT

Change and Configuration

- Deliverable
  - Known configurations and predictable adaptations
- Purpose
  - Ensure that changes are planned, that unplanned changes are minimal, and that IT services are robust
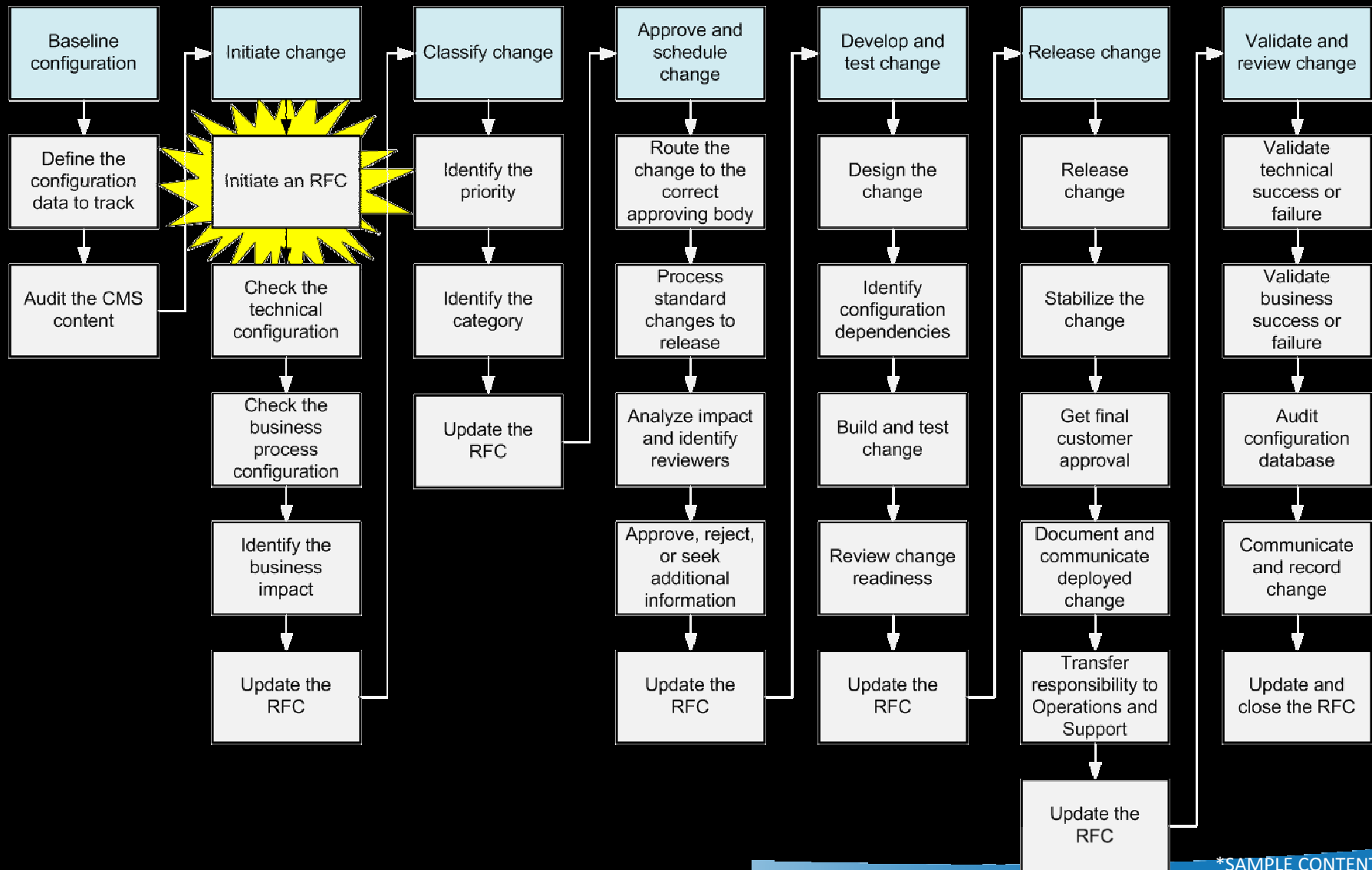- Outcome
  - IT services are predictable, reliable, and trustworthy

Team

- Deliverable
  - Clear accountabilities, roles, and work assignments

- Purpose
  - Agile, flexible, and scalable teams doing required work

- Outcomes
  - IT solutions are delivered within specified constraints, with no unplanned service degradation
  - Service operation that is trusted by the business

Accountability	SMF	Nature of Work
Support	Customer Service Problem Management	Interrupt-driven
Operations	Operations Management Service Monitoring and Control	Plan-driven, repetitive
Service	Business/IT Alignment	Plan-driven, long-term
Compliance	Governance, Risk, and Compliance	Plan-drive, repetitive
Architecture	Reliability Confidentiality Integrity Availability Capacity Continuity	Plan-driven, long-term
Solutions	Envision Project Planning Build Stabilize Deploy	Plan-driven, short-term
Management	Financial Management Business/IT Alignment Policy Governance, Risk, and Compliance Change and Configuration Team	Plan-driven, long-term

Change and Configuration throughout the Lifecycle

Baseline configuration	Initiate change	Classify change	Approve and schedule change	Develop and test change	Release change	Validate and review change
Define the configuration data to track	Initiate an RFC	Identify the priority	Route the change to the correct approving body	Design the change	Release change	Validate technical success or failure
Audit the CMS content	Check the technical configuration	Identify the category	Process standard changes to release	Identify configuration dependencies	Stabilize the change	Validate business success or failure
	Check the business process configuration	Update the RFC	Analyze impact and identify reviewers	Build and test change	Get final customer approval	Audit configuration database
	Identify the business impact		Approve, reject, or seek additional information	Review change readiness	Document and communicate deployed change	Communicate and record change
	Update the RFC		Update the RFC	Update the RFC	Transfer responsibility to Operations and Support	Update and close the RFC
					Update the RFC	

*SAMPLE CONTENT

SMF Example Change and Configuration

Activities	Considerations
Initiate a Request for Change (RFC)	**Key questions:** What kind of information is to be included in the change description? For example, the service that will be affected, the business benefit, and the exact description of the configuration items to be changed. Who can initiate a change? Can anyone in the organization initiate a change? How will the RFC be categorized and tracked? Does each service maintain its own set of RFCs? How are RFCs interlinked and cross-referenced? Is there a specific RFC for common or standard changes? **Inputs:** Request for a change. Description of the change. **Output:** New RFC. **Best practices:** Keep RFC forms as simple as possible while capturing sufficient information to manage risk. The RFC should be continually updated throughout the process; it can be initiated without a thorough analysis or detailed information about the change and then be updated later. It is important to have easy access to the RFC so that additions can be made to it. Additionally, organizations can use role authentication to ensure that read and write access is applied at the right time during the process. Determine who should have permission to read or change the RFC in each step. The organization can streamline the RFC process by using pre-populated fields and drop-down boxes for information such as the type of change, the service affected by the change, and the applicable technology.

*SAMPLE CONTENT

Support ideas with examples
Request for Change Template

Information Required	Specific Details
Description	Provide a complete description of the nature of the change. Include: The services affected. The configuration items (CI) to be changed. Current version of the item to be changed. For complex changes, any supporting project documents should be referenced and linked to the RFC.
Date that the change is requested	Define and control a set date format: For example, 30_Dec_2004
Change initiator: person who submits the request	Include: Name. Position. Contact information, such as e-mail address and phone number.
Business reason for change	Reason for the change Include business impact statement Identify customer that change impacts

*SAMPLE CONTENT

MOF on the Web
A Service Management Community

- Vision
  - Develop a thriving, engaged community to extend service management knowledge and evolve best practices in real time

- Community Benefits

  - Contribute and be recognized
  - Interact with Microsoft and industry peers
  - Find training, samples, and job aids
  - Stay on the leading edge

Solution Accelerators

SOLUTION**ACCELERATORS**
Act faster. Go further.

PLAN

- Microsoft Assessment and Planning
- SharePoint Capacity Planning Tool
- Data Encryption Toolkit
- Windows Vista Security Guide
- Office Security Guide
- Windows Server 2008 Security Guide

DELIVER

- Microsoft Deployment Toolkit 2008
- Assessment and Deployment Solution
- Infrastructure Planning and Design Series
- External Collaboration Toolkit for SharePoint
- Upgrade Toolkit for Windows SharePoint Services Sites and Templates
- SharePoint Cross-site Configurator
- Data Encryption Toolkit
- Assessment and Deployment Solution

OPERATE

- Offline VM Servicing Tool
- Microsoft Forefront Integration Kit for Network Access Protection
- Security Compliance Management
- Network Monitoring Management Pack for System Center Essentials
- SharePoint Monitoring Toolkit
- SharePoint Asset Inventory Tool
- Business Application SLA Reporting
- Malware Removal Starter Kit
- Data Encryption Toolkit

MANAGE

SOLUTION**ACCELERATORS**
Act faster. Go further.

- Microsoft Operations Framework 4.0
- Microsoft Assessment and Planning
- Fundamental Computer Investigation Guide for Windows

- Windows Vista Security Guide
- Office Security Guide
- Windows Server 2008 Security Guide

www.microsoft.com/solutionaccelerators

MOF 4.0 Automated Through System Center

Microsoft®
System Center
Capacity Planner 2007

Microsoft®
System Center
Operations Manager 2007

Microsoft®
System Center
Service Manager

Microsoft®
System Center
Data Protection Manager

Microsoft®
System Center
Configuration Manager

Microsoft®
System Center
Virtual Machine Manager

What's Next for MOF

MOF Core IP

- Guidance for key IT scenarios (Run Book Automation, Books, SMB scaling)
- Integrate architecture and development

Training and Certification

- EXIN certification
- Training Materials & Partner promotions

Community

- Content rating, tagging, webcasts, Partner roundtables,
- Contributions → MOF & SA

Resources

- www.microsoft.com/mof
- forums.technet.microsoft.com/en/MOF4/threads
- www.microsoft.com/solutionaccelerators
- www.EXIN.org

ITSM Academy, Inc.