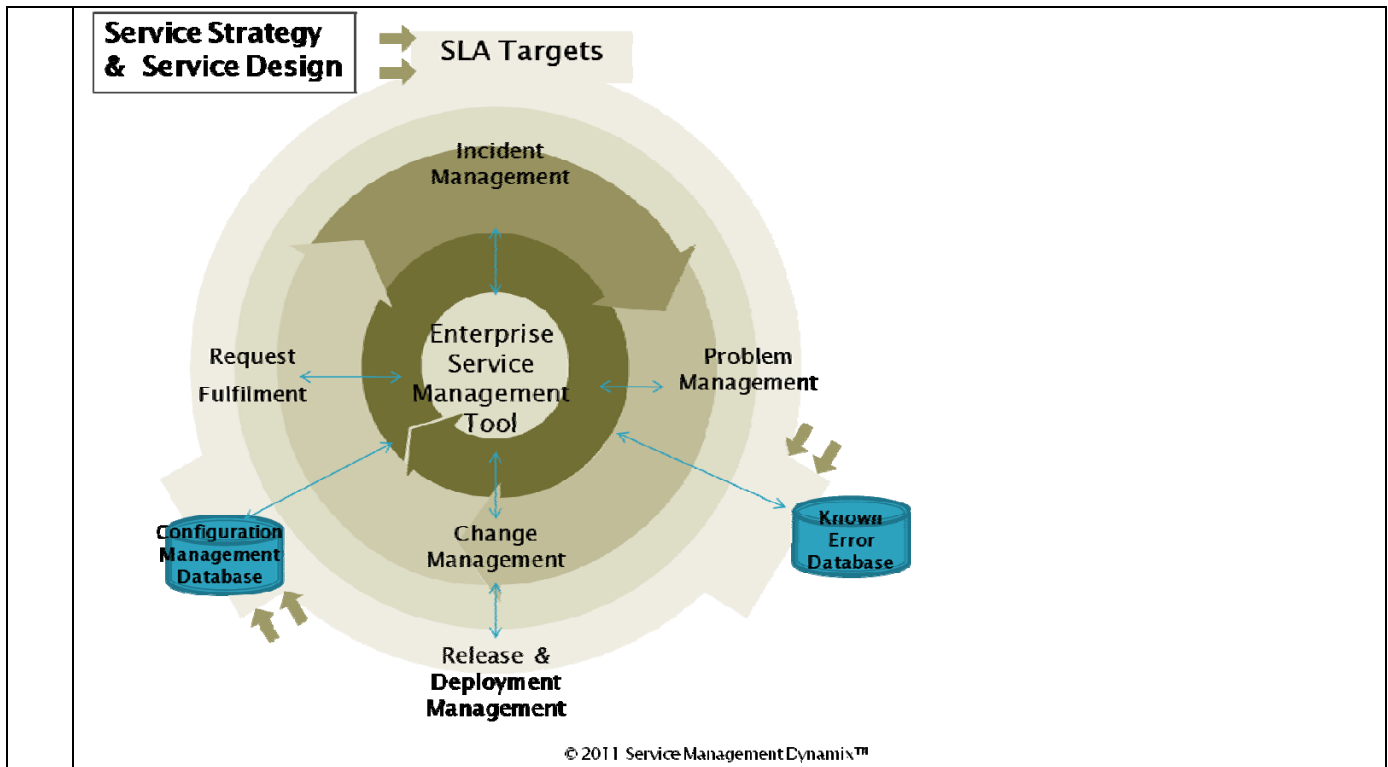| 1.	**Q: This is all great - can you speak more about convincing senior management that some investment (time, money, consultant) etc. is needed?** A: Does the IT organization understand the mission, goals and objectives of the business? I have yet to get approval to buy a technology because it is 'cool' or secure other types of IT investments that way. A Business Impact Analysis (BIA) will tell us what is important to the business. If it is important and we want to bring a solution to the table that addresses that importance, we can better justify it. Look for the business strategy. Where is the strategy? Do we have a BIA? Know what is important to the enterprise (includes IT). If a business unit needs functionality, and it is important to business strategy, and represented in the BIA, get them to be your partner and get the justification. New solutions happen more effectively (in the CFO's office) when the business is engaged).
2.	**Q: My CIO insists on buying a Service Management tool before we have our processes designed. What can I do?** A: We have mentioned "no tools before the rules." Point out the risk. At one organization I worked at I knew it was time to go when they got rid of the CIO and kept all the "Generals." The CFO then said, "I am all about process as long as it doesn't slow me down." It is a sign of not wanting to take the time to plan and was a warning that risk of failure was eminent. Look at and point out the process model in the presentation. Are we willing to take the risk of a significant tool investment before we know what we are doing? We risk not getting Return On Investment or not enough of it. So now If you get exactly what you need it will be by pure luck. Do you want to take that risk with your money? We need to explain no tool without the rules.
3.	**Q: What if the stakeholders (particularly customers) are apathetic and are difficult to engage?** A: Find a customer willing to participate in a proof of concept that shows engagement of customers, if not all customers. But first consider why the apathy? Is it a lack of trust? Has IT communicated the need and value of customer involvement? Is IT a true partner and asked to be at the table where the true decisions are made? If not, the answer to your question is hiding behind that situation.
4.	**Q: What areas should be represented on the tool selection committee?** A: Stakeholders, Business Relationship Managers (BRMs), Product Managers, Functional area representatives, concept owners, Super Users. Database Analysts (DBAs) can be wonderful to add as well. Believe me you don't want to bring in DBAs *after* a tool has been selected. Big mistake. Let's not forget the people on the other side that are signing off on the service. You really can't have too many stakeholders. Ask yourself, what vendors are you willing to put in front of your customers? You will find a good vendor has a BRM mentality.
5.	**Q: Our vendor is happy to make everything work, but we pay $191 for every hour that they configure it and $191 for every hour they spend fixing the bugs they introduced when they configured it. How do you convince them that you shouldn't have to pay to make their solution work (as the sales person promised)? We're a Fortune 50 company and still beholden' to the vendor.** A: Unfortunately, managing that situation typically has to happen before you sign on the dotted line. ITIL V3 introduces Supplier Management and teaches us Service Level Requirements (SLRs) are

	a marriage between Design and the rest of the framework. Retrofitting is now developing Key Performance Indicators (KPIs) that you expect to be met. Penalty clauses should be added in contract along with specific requirements and KPIs. A vendor should be a partner: shared risk/shared reward. You can escalate to the situation to the CIO, CEO, CFO and C-level to say we (IT in the trenches with the vendor) need more 'horsepower.' What can we do to fix the reality when it differs from our expectations? Make sure you have as much data as possible. One client I know was recently able to pull from the tool whether the vendor met requirements or not. There is a way to a contract or expectations even if you need more horsepower. Bring it back to the business.
6.	**Q: If you have a vendor "partner" that is difficult (if not impossible) to engage, is that reason enough to make a switch?** A: We are held accountable for ROI and Total Cost of Ownership (TCO). There is a risk going back to your CFO saying ROI did not work. Look at everything you have (in your existing tool) before going to look at something else. If you still need to make a switch, some vendors are willing to be brought in initially on maintenance fees alone to 'get in the door'. In the spirit of competition you can use that leverage to force engagement. No matter what, for most of us there is a reoccurring monthly cost. Overall, look at the ROI factor first and see if you can fix it before looking at a replacement. Bear in mind that whatever the tool you buy 'today', it won't be the right one 'tomorrow'.
7.	**Q: Coming from the CSI Owner how do you get ITIL Experts (Service Owners) to use some good CSI processes before they vote to throw out the tool based on a poor implementation? Or how do you best get the point across that putting in a new tool will not solve all your problems?** A: Take a careful look at Supplier Management in the Service Design book. First, it is great you have a Continual Service Improvement (CSI) Owner! A CSI Owner's important interfaces are Process Owners and Service Owners. This situation takes us back to the closed loop diagram. A vendor is subject to the Supplier Management process. In CSI, we are going to pull data to recognize the areas to improve. As CSI Owner, become a trusted partner; explain your role, train people on what CSI can bring to the business and each process area, supply a Balanced Scorecard and Key Performance Indicators (KPIs). Educate. Develop KPIs for our vendors – SMART (Specific, Measurable, Achievable, Realistic, Timely) goals or 'stretch' goals; look at data at intervals – this step should be in your process policies; look at how you are doing with Strategic, Tactical, and Commodity partners, etc. Often a CSI Owner needs to be trained in Six Sigma or Kaizen or Total Quality Management (some special approach) to get methods and language that works for various audiences.
8.	**Q: Are some tools "ITIL Compliant"?** A: I don't like that term. What they (our tool vendors) are really seeing is 'we cover some of the Service Management or ITIL processes in our tool set.' Your job at your company is not to be ITIL compliant. ITIL is guidance and was not meant or written to be a how-to. Where are we versus where do we need to be? The ITIL material gives best practices on how to close the gap. A vendor should be asking, 'What is your strategy?' If you don't know your strategy, ITIL can't help you effectively and efficiently with what processes/modules (in the tool) you may need. The rick of too much or not enough it too great.

9.	**Q: In answer to that one, we had lousy processes - we're running a project simultaneously with tool selection to get the processes in place then use the tool to enforce them.**
	A: You are better off taking the time to white board or get process flow down first. We can't use the tool to force process alignment in the most effective way without knowing what mission, goals and objectives with our process are in the first place. We know that high performing IT organizations spend significantly more time planning, resulting in less re-work and add-ons. Speed gets us in trouble.
10.	**Q: How important are detailed process models for overall communications, training, acceptance?**
	A: I love process models because of RACI (Responsible, Accountable, Consulted, Informed). A RACI chart gets everyone involved. If we don't get everyone involved initially, we take a risk before we sign on the dotted line. Let's be careful about the Process Model and what it says. If you look at the Process Model diagram (see presentation) and do all of it, that could be considered a score 10 out of 10. From an ITSM perspective, we may only do 70% of the contents of that Process Model diagram for your organization. That may be enough and would constitute a score of 10 out of 10. Then what is the next step, etc. You ITSM Strategy should dictate.
11.	**Q: What is most critical to marketing an IT change to customers?**
	A: At the itSMF USA conference in 2003, John Heller was a keynote speaker and was brought back again in 2005. He was and still is the CIO at Caterpillar and (respectfully) a 'geek' meaning he really understands IT. In a keynote, he said (paraphrasing) that "if IT thinks that the business is going to come to us to understand what we do, we are wrong. We have to take our story to them." IT can no longer afford to be just a group of a DBA team, a Windows Server team, etc (functional areas). We have to be service-oriented. At Caterpillar, he was able to sell ITSM across all C-levels. He simply said here is how we want to do business and here is why. He related his story to the strategy of the business. Caterpillar started Vision 2020,
	http://authorpambaker.com/Website%202007%20Update/Caterpillar%20CIO%20Profile%20Story.pdf http://www.y-change.com/htdocs/files/Nat%20ASP%20Presentation%20CAT%202%2026%2007.pdf
	which is how Caterpillar wanted to get to their vision by 2020. They are doing Service Management because they wanted to take a structured approach. 'Here is how we are doing it and here is why.' The Computer World article from May 2010 I referenced in my presentation is the same story; *These CIOs go way beyond IT-business alignment*. (Please note you may need a subscription to see the story. It is free.) Don't make things harder than we need it to be. Marketing is about communication. Take our IT 'stuff' and present it in a way that makes sense to the business. I hate separating "IT" and the "business." That division is IT' fault and it is just a lack of communication or poor communication.
	Leverage what other people are doing based on best practices. We are setting ourselves up to fail when making changes that are unauthorized. If the questioner does have a challenge keeping the people on his/her team in order, then go back to communication. Big changes are like an ERP implementation, it takes resources and money.
12.	**Q: If the tool has already been selected and customer doesn't like the tool and you go as an Architect (contractor) to work there then how to deal with the customer?**

	A: Get the stakeholders in the room. If you don't do something to get clear direction, you are going to be a victim. Go higher and escalate to the point where the authority is there. I worked for EDS during the Ross Perot era. At one point and he would say, "Accountability without authority is not an option." Go to the level of authority to make a statement that everyone has to follow. Then look at KPIs, commitments, requirements, what did we sign off on, etc. Remember the premise and description provided for this webinar: typically it is not the TOOL! Usually it is all the pre-work done before the tool or lack thereof – we have to look at what is our ability to change that.
13.	**Q: What would you suggest to be the best strategy to under study a business pattern of a customer?** A: Remember what we say about Demand Management in ITIL V3 Foundation classes? In ITIL V2 – Demand was a part of Capacity Management. It still is in V3 but divided in 2 pieces: Strategy – pieces PBA (Patterns of Business Activity) – and (UP) user profile. There is a wonderful perspective in the Strategy book of looking at the Service Desk. Today, a Service Desk manager will know how many people are needed to have on staff in any day of the week based on data: here is how many Service Requests, Incidents, etc. we get from users at these times on these days associated with a particular business process. That all depends on Demand. Can this be done initially? No. A first start is estimated based on business demands. Service Level Requests get identified in Design, embellished on in Service Transition, and more embellishments added in Service Operation. Then comes CSI: here is what we do with the patterns we thought we had. Establish a baseline and keep watching. This allows us to establish even better planning for needed resources. Remember that Service Strategy is intended to identify the Demand, while Service Design is there to architect to meet that Demand (as part fo the warranty processes). That is the only option you have. Research organizations like McKinsey, Gartner, Forrester, etc. can help look at other industries to help based on the data they collect (which makes our guessing more 'educated').
15.	**Q: Can we please go back to the slide that shows EA?** A: See diagram below:

Service Strategy & Service Design → SLA Targets

Incident Management

Request Fulfilment

Enterprise Service Management Tool

Problem Management

Configuration Management Database

Known Error Database

Change Management

Release & Deployment Management

© 2011 Service Management Dynamix™

This diagram is the culmination of all we have discussed in this session. That is, understanding the strategy of our organization, and therefore the strategy of our ITSM Practice, which drives what we want from our enterprise service management tool? This is but one depiction of how a deployment might be reflected. Bear in mind our discussion on our ITSM processes being closed loop systems. This is the result.

Processes are not (should not be) silo-ed. They are enablers of each other. Here there is a connection (interface) between Service Level Management, Incident Management, Problem Management, Change Management, Request Fulfillment, Service Asset & Configuration Management, and Release & Deployment Management. The implication is that the tool supports each of these processes. A major benefit is that our functional areas in our IT service provision don't have to memorize processes – they just need to have awareness and training on the use of the tool. By default, we all end up following the process. The architecture here is a result of the Service Design capability of the Service Provider, which cannot occur without clear understanding and planning of requirements - remember the Four P(s).