



From ITSM Academy's Webinar on September 18, 2008. Presenter was Donna Knapp.

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**CONCEPTS & TERMS**

**Q: How do you sell a new process to those who are well entrenched in an existing process and are resistant to change even if it's for the better??**

**A:** Good question! The answer is to persist. We often use the term quick wins. Identify areas of pain that people are experiencing and look for opportunities to demonstrate proof of concept by eliminating or minimizing those pain points. Also be careful not to bite off more than you can chew. It's easier for people to accept "baby step" changes than massive, disruptive changes. Look at how much bandwidth people have to absorb change and plan your project accordingly. Small, incremental improvements will get you there just as effectively as the big bang approach. Education and training are also important. Use a variety of opportunities to promote awareness of and sell the benefits of the processes. Celebrate improvements you've seen already and thank people for their contribution. Over time you will help people understand that this new way of doing things is good.

**Q: What is the best way to avoid building bureaucratic processes?**

**A:** Start with an understanding of the controls you need to have in place in your organization. Even with COBIT, you need to understand what regulatory controls your organization really needs to have in place based on its industry and risk profile. A lot of times when organizations have bureaucratic processes, it's because they *think* they need to have all these controls in place, when in fact they really do not. ISO/IEC 20000 is also a good tool to use as it has a relatively small set of requirements for each process. Even if you don't envision seeking ISO/IEC 20000 certification, use it as a tool to benchmark your processes against best practice. Also, talk with your internal auditors and have them help you identify which controls need to be in place. From there try ensure that any checkpoints and approvals you have in place are really needed to support the controls.

**Q: Which role should lead process design in an organization?**

**A:** A Certified Process Design Engineer (CPDE certification). This person's role in the organization could be, for example, a process owner, a process manager, a project manager with process design experience, a trained facilitator with project management experience. It is the skill set that is important. The person leading the process design initiative needs strong project management and facilitation skills. He or she must understand the associated framework(s) being used and have a broad base of skills in terms of IT Service Management and process design methodologies. Once you have identified a person with good, strong skills, that person may serve as a consultant within your organization; helping out any time those skills are needed.

**Q: You mentioned a Process Design Workshop. If I lead this workshop, where should I go first to get the information and education I need to be successful?**

**A:** The CPDE course covers the workshop itself, how to prepare for the workshop, tools and techniques to use in the workshop and how to record the results. You could also go to your local library or book store and look for books on process design. With the strong interest in Business Process Management right now there are a number of books available.

**Q: You mentioned the necessity of documents. Is there somewhere I can find templates of these?**

**A:** We provide some templates in our course. There is a website called [www.isixsigma.com](http://www.isixsigma.com) that has some good examples of documents. Another good web site is [www.docstoc.com](http://www.docstoc.com) which is a portal that can be used to find and share professional documents.

**Q: What metrics do you recommend to measure Service Desk results??**

**A:** Response times such as average speed of answer (calls), chat response times, email response times, web form response times and so forth. First contact and first line resolution percentages are important as is re-open percentage. It's important to understand that if you have a high first contact resolution and a high re-open percentage as well, something's wrong. Based on the processes your service desk is involved in you'll most likely also have other metrics such as request fulfillment metrics and change management-related metrics. Strive to have a balance of metrics (efficiency, effectiveness, quality). Also, in this day and age of self-help, know that it will become harder for the service desk to have a high first contact resolution percentage. Self-help and processes like problem management and change management, when done well, will tend to bring down your first contact resolution percentage as the recurring incidents are being prevented. For the moral of your staff, be aware of where you are from a maturity perspective and adjust your targets accordingly. And of course the big bottom line in a service desk is customer satisfaction. Event-driven surveys that are triggered by a contact are critical as they let you know immediately how you are doing. Consider also an annual or semi-annual survey that is sent to your customer population, with a percentage of surveys going to customers who have NOT contacted you recently. If customers are not contacting you because of poor service, even if perceived, you want to know that.

**Q: How do you develop an Organization Change Management and executive leadership? "The tribe reflects the personality of the chief...."**

**A:** Regarding leadership... You first have to educate your leadership. Some of you will be lucky because your leaders attend conferences, etc. You can check sources such as Gartner and CIO Magazine. There are articles all the time that talk about the benefits of using best practices. Figure out what's important to your leadership team and tie the benefits to those goals and the overall goals of your business. You might invite the leadership to a lunch and learn awareness session. Also it's important to ask for specific things, e.g., ask your leadership team if they will write an article or agree to be interviewed for the newsletter. Also ask that the ITSM program and best practices are added as a regular line item to their agenda when they meet with their direct reports. Some of the most effective leaders I have seen attended the very first Foundation class in their company and then walked around displaying their pin. Last but not least, ask leaders and management to follow the processes. Regarding Organizational change management... Organizational change management techniques are rooted in listening, communication, education and training. If you're not communicating with people, you need to know that they're out there making things up. Be creative and get people engaged. Find out who the "underground" leaders are in your organization and get them on board. Education and training are also important. Education gives people the big picture perspective they need to understand how all the various projects you may have going on are interrelated. Leadership and education combined help people understand the vision, i.e., where the organization is heading. Training then provides the skills they need to fill their particular role.

**Q: I'm an ITSM consultant with ITIL v3 Foundation certification. What ITSM framework (ITIL, MOF, ISO 20K) is most widely used by small- and medium-size businesses and large enterprises?**

**A:** ITIL is currently the most widely used framework in the world and can be adapted to organizations large or small. According to a 2008 study conducted by IT services provider Dimension Data, nearly 60 percent of 100 U.S. CIOs polled confirmed that they are working with ITIL. Outside the U.S., 66 percent of 270 organizations polled have adopted ITIL. According to a different survey of 255 IT professionals conducted by Axios Systems at a series of service management events across the UK, Australia and America, 87 percent of organizations now use ITIL. Increasingly, however, the answer is and is going to be ITIL +, i.e., ITIL in conjunction one or more other frameworks. According to the 2008 Dimension Data survey regarding the use of ITIL, for example, found that 46 percent reported using Six Sigma, 38 percent use Microsoft Operation Framework (MOF), about one third use ISO standards and 30 percent have Total Quality Management programs in place

**Q: Will Six Sigma techniques be incorporated into the CPDE training, and is this training virtually delivered or is it in a classroom setting?**

**A:** Yes, Six Sigma is discussed (along with several other frameworks) and some Six Sigma techniques are incorporated into the training. The class is offered in a classroom setting and is very interactive. Students benefit from hearing others tell what has worked and what has not worked for them. There is also a workshop component to the class that enables attendees to practice what they are learning.

**Q: What is the best way to determine which of the tools to consider, i.e., ITIL, COBIT, MOF, etc?**

**A:** Begin by educating yourself on what each framework is designed to achieve. It's really not typically an either/or situation. Using a number of these frameworks can benefit your organization and that's one of the big messages we're delivering in CPDE. Increasingly, for example, a lot of organizations that are focused on ITIL also refer to MOF. If you are required to comply with regulatory controls, you probably already have someone in your organization who knows about COBIT. If you work for a government agency on the other hand, you may not feel compelled to look at COBIT... but you may want to take a look at ISO/IEC 20000. Should every organization implement Six Sigma? No as it is very data intensive and can overwhelm smaller organizations and cost a lot of money. But you can “steal shamelessly” some of the statistical analysis techniques describe in Six Sigma and benefit from those. Some of you have mentioned ITIL Version 3 and ITIL Version 2. Those can actually be used in conjunction with each other. If you have an ITIL V2 effort under way, by all means, keep going! But look at V3 and “steal shamelessly” from it. ITIL V3 has “solved” some of the challenges organizations have experienced adopting V2 such as a single CMDB... so give it a look.

## **PUBLICATIONS**

There were no Publication questions during the Webinar.

## **COURSES AND CERTIFICATION**

**Q: Does the CPDE certification course offer PMI PDUs?**

**A:** Yes it does, it offers 38 PDUs. In class we draw from PMI's Problem Management Body of Knowledge (PMBOK) and talk about project management best practices and so I feel project managers who are interested in learning more about process design will really enjoy this class.

**Q: What is the governing body for CPDE?**

**A:** It is a Loyalist (LCS) certification and they are governing body.

**Q: Are there prerequisites for the CPDE course?**

**A:** Yes. Students must hold one of four IT Service Management foundation certifications, i.e., ITIL, MOF, COBIT or ISO/IEC 20000). Although students learn a lot of project design and improvement techniques and tools that could be applied to any initiative, the course is geared specifically to IT Service Management. Having said that, the class is very agnostic, it is not just limited to ITIL.