

# Succeeding with Service Agreements

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ITSM Consulting

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# Agenda

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1. Service Catalog and Agreement Perspectives
2. Service Structure
3. Our Approach
4. Document Templates
5. Forms Processing
6. Simple walk-through example
7. Wrap up

# Pandora's Box!

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- Reading about the Service Catalog and Service Agreements is easy...
  - making it happen is another storey!
- There's no hiding the fact that any Service Agreements initiative is a long, hard, and complicated journey that gets more challenging the further into it you go!



# The Book of Business

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- The Service Catalog is the “book of business” where “Services” are identified in IT Service Management
- We publish relevant information about IT Services to our IT users

“What we do”



# The Binders for Business

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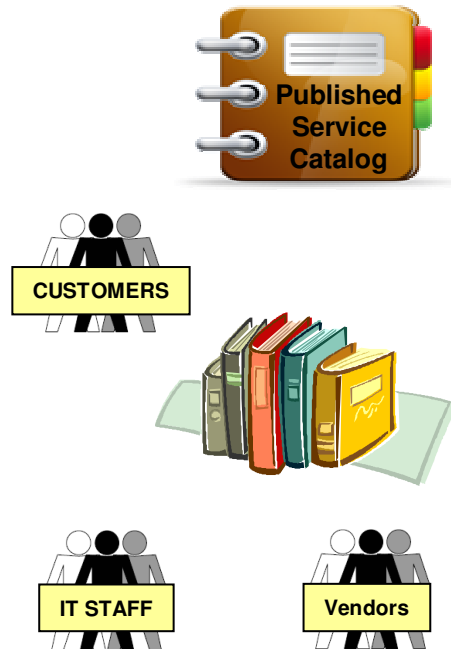
- If the Service Catalog is the “Book of Business”, then Service Agreements are the “Binders for Business”
  - We publish details of our Service Level Agreements with our customers
  - We publish our internal Operational Level Agreements with our IT staff and teams

“How we do it”



# IT Service Structure - 1

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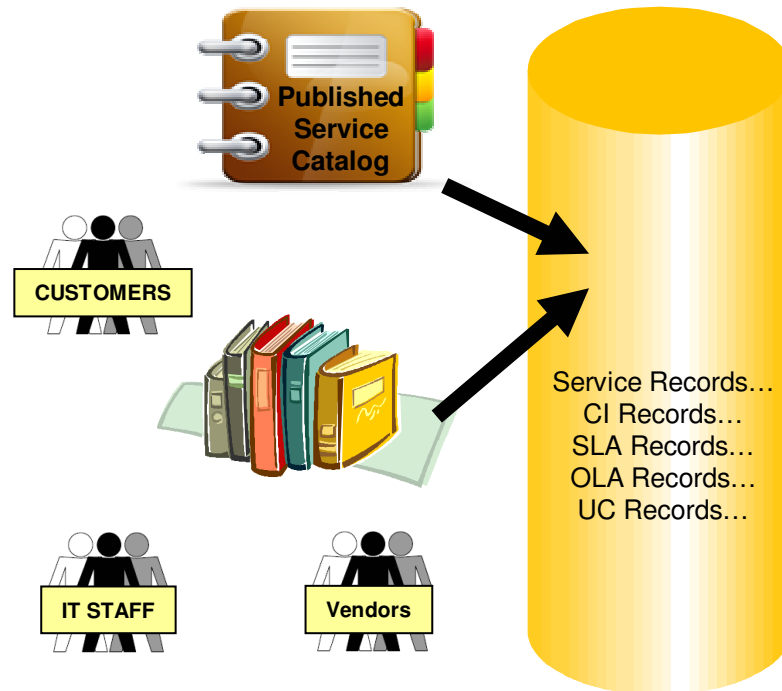


- The “published” Catalog and Agreements is NOT where we start

– This will lead to static and “dead” *documents*

# IT Service Structure - 2

- We start with a structure of Service records and publish linked views to these records

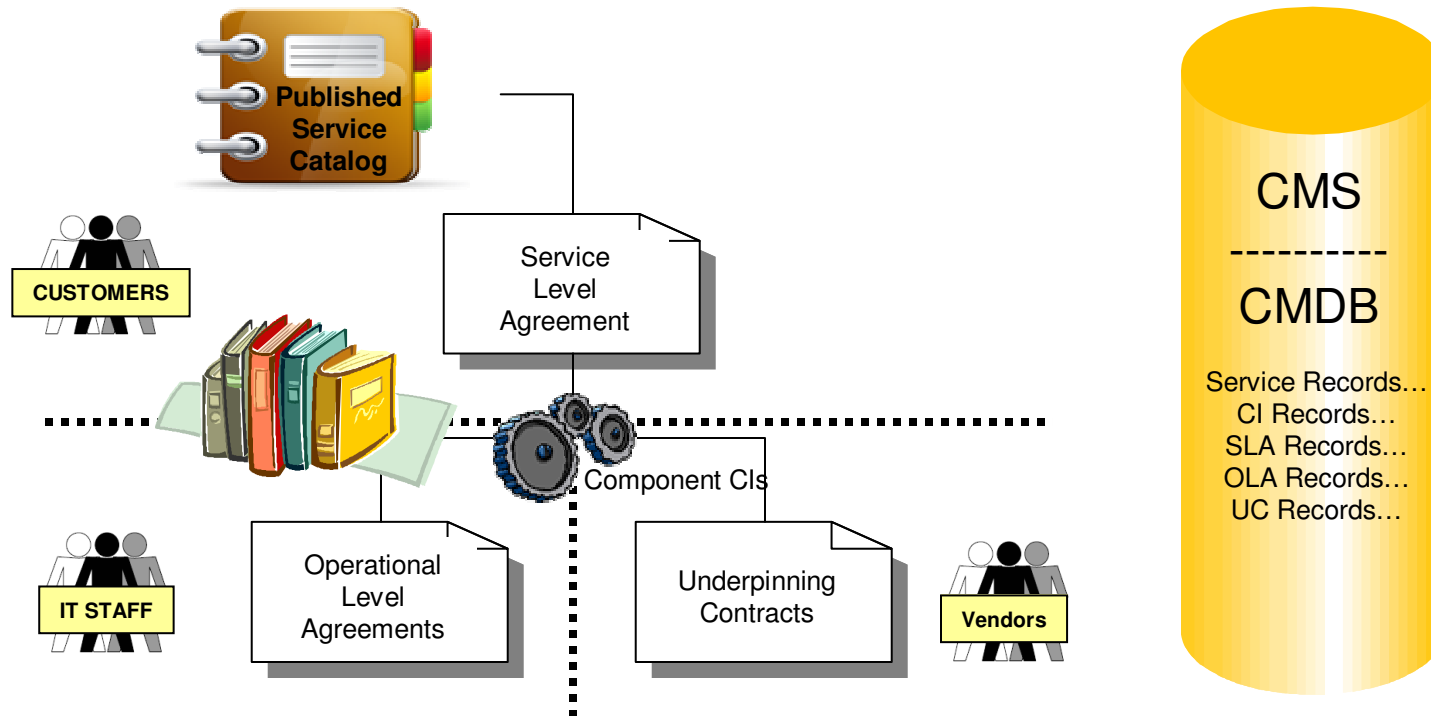


– This will lead to dynamic and “live” information



# IT Service Structure - 3

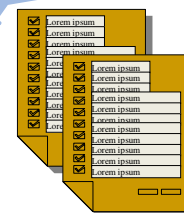
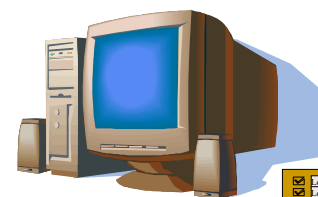
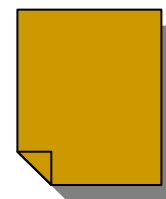
- The Service Catalog and Agreements are collections of records in a database



# Our Approach

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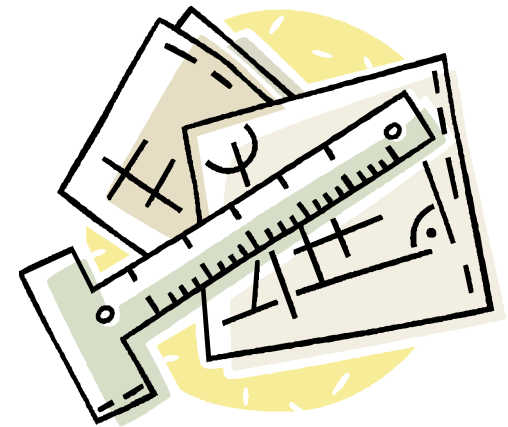
- Create document design templates
- Use a database
- Create form records from templates
- Provide a separate User Interface
- Start small and grow over time...



# What is a Document Template?

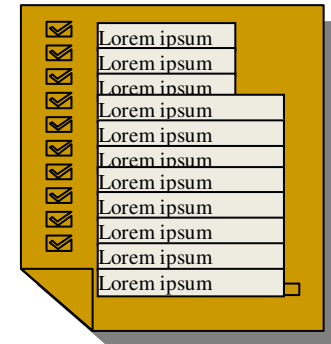
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- A document template is a standardized **master** document in which to globally edit text and graphic content that will become common to each published version of the same document.
- Advantages of templates include:
  - Efficiency
    - One document for focus and development
    - Rapid replication from the template
  - Effectiveness
    - Standardization of structure and layout
    - Consistency for replication
  - Alignment
    - Replicated versions align back






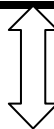





# What is a Form?

- A form is a document with fields in which to type or select data of similar content. Advantages of forms include:
  - Efficient data entry
    - Users are reminded of data required and constraints of data options (such as with the use of “selection list” dropdowns)
    - Structured for rapid select or typing
  - Effective data collection (of similar type and structure for later comparison)
    - Data of similar type and storage structure
    - Data consistency and standards
  - Alignment to a master document
    - Forms are structured to be grouped, categorized, classified, and summarized
    - ***New fields are instantly added to all instances of the form***






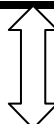





# Add Service Detail using Form Templates

- Template Agreements are records and fields in the database linked to Configuration Items
  - Data is entered through a Form
  - Forms create consistency and promote standards
  - Data is printed using Forms and Reports

Service Agreement	
Ownership:	xxxxx
Agreement (components):	Client Management Service 
Dependency (components):	CRM Desktop Application Desktop PC 
Service Features & Functionality:	1) xxxxx 2) xxxxxx 
Service Pricing:	\$xx / user
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours .... 
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx .... 
Availability:	1) xxxxx 2) xxxxxx 
Capacity and Performance:	1) xxxxx 2) xxxxxx 
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx 
Change Policy:	1) xxxxx 2) xxxxxx 




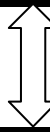





# Flow-Through Agreements

- Don't create separate templates for Service Catalog, SLAs, OLAs, and UCs
- Use the same template and designate field eligibility for the Service Catalog, SLA, OLA, UC
- This will allow the aggregation of supporting details to determine realistic Service Level Agreement promises and commitments

	Service Agreement	Eligibility
Ownership:	xxxxx	sc, sla, ola
Agreement (components):	Client Management Service 	sc, sla, ola
Dependency (components):	CRM Desktop Application Desktop PC 	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours .... 	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx .... 	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx 	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx 	sc, sla, ola




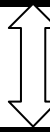





# What About Third-Party Contracts!?

- ***Transpose the contract back into the Agreement Template***
- Third-Party Contracts are legal documents written in legal language, with a legal format determined in part by the Third-Party
- Use the Agreement Template to help you identify “what” to include in the contract

	Service Agreement	Eligibility
Ownership:	xxxxx	sc, sla, ola
Agreement (components):	Client Management Service 	sc, sla, ola
Dependency (components):	CRM Desktop Application Desktop PC 	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours .... 	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx .... 	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx 	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx 	sc, sla, ola

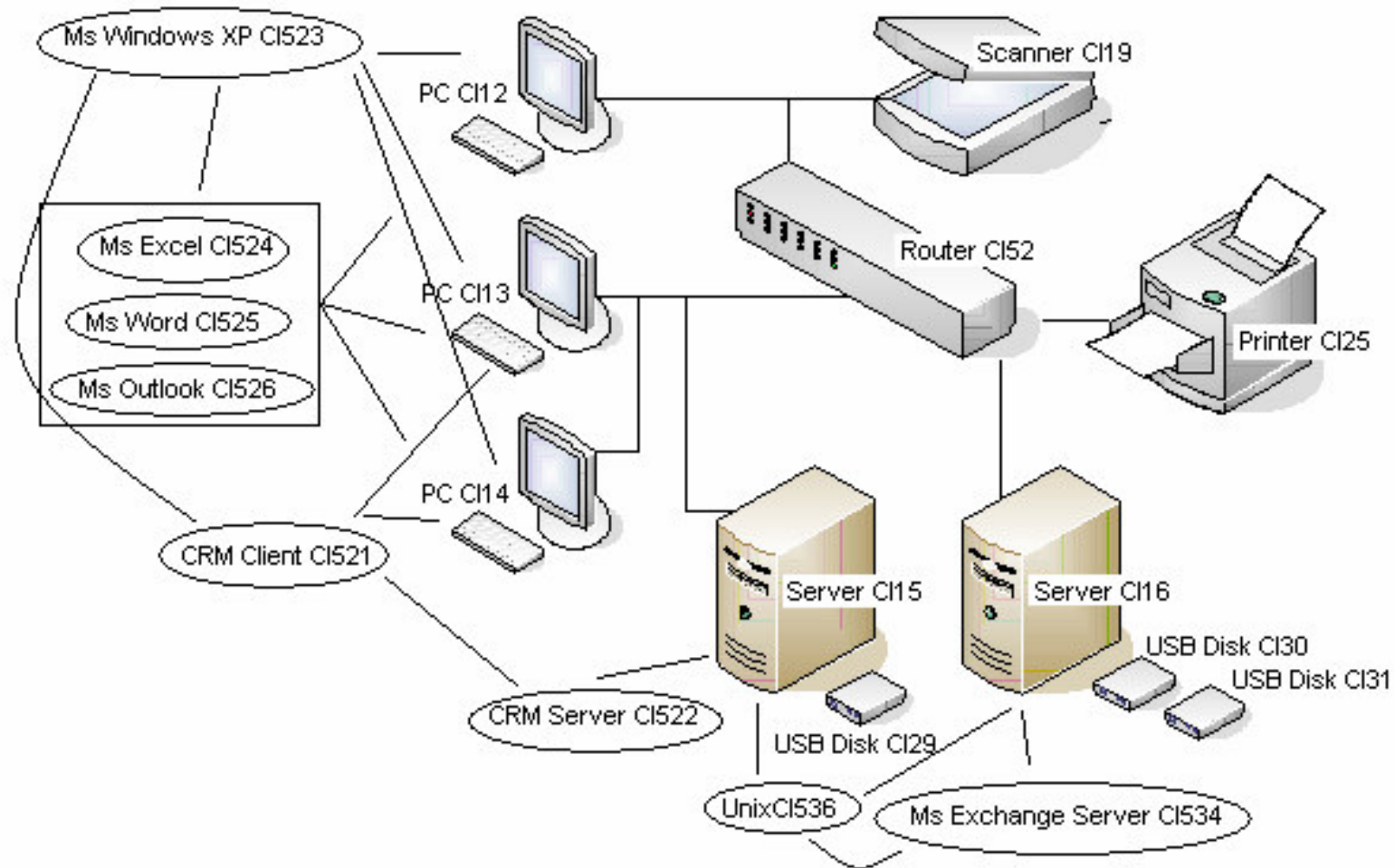
# Don't Forget Ownership: Its Critical

- Ownership is the most important guarantee to enable IT Service Management
- Ownership is Accountability and implements the RACI model in our Agreements

	Service Agreement	Eligibility
Ownership:	xxxxx	sc, sla, ola
Agreement (components):	Client Management Service 	sc, sla, ola
Dependency (components):	CRM Desktop Application Desktop PC 	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours .... 	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx .... 	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx 	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx 	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx 	sc, sla, ola

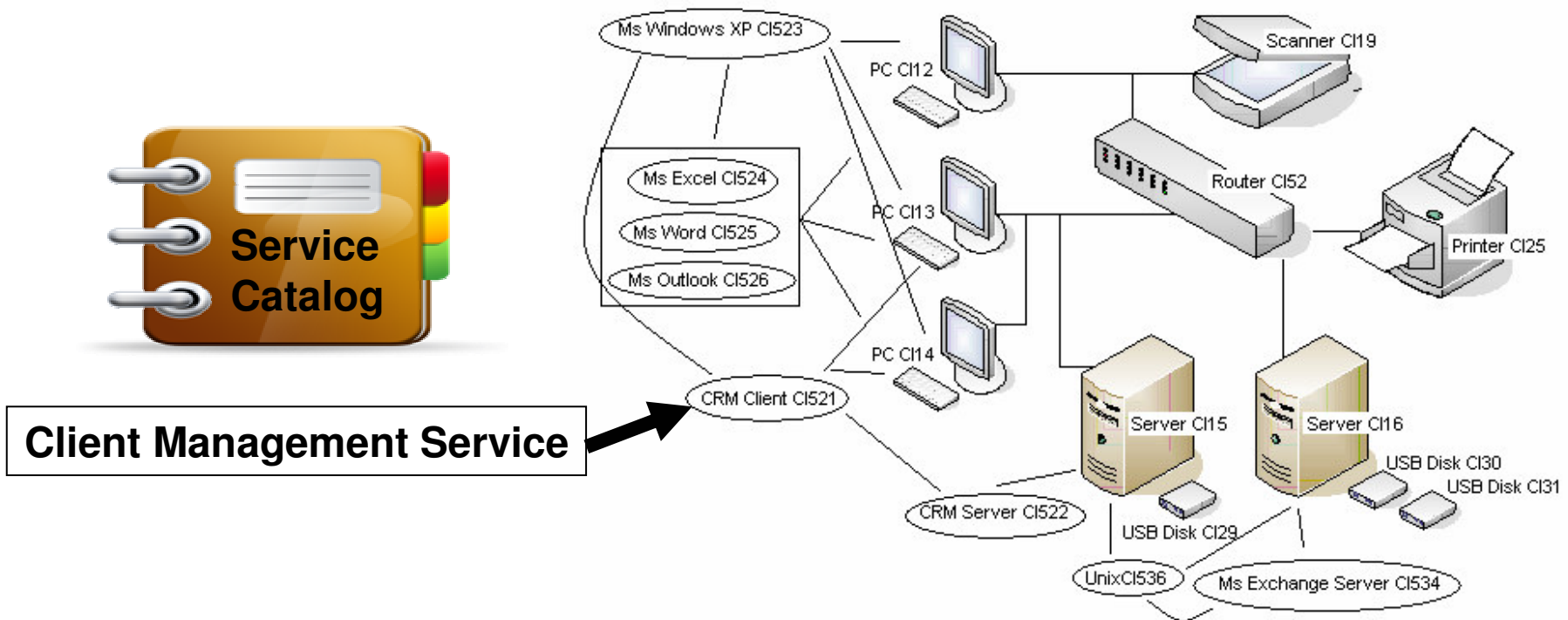


# A Walk-Through Example



# Start from the Top

- If you don't know your destination you'll never get there!!
- If you don't have a target you'll never hit it!!



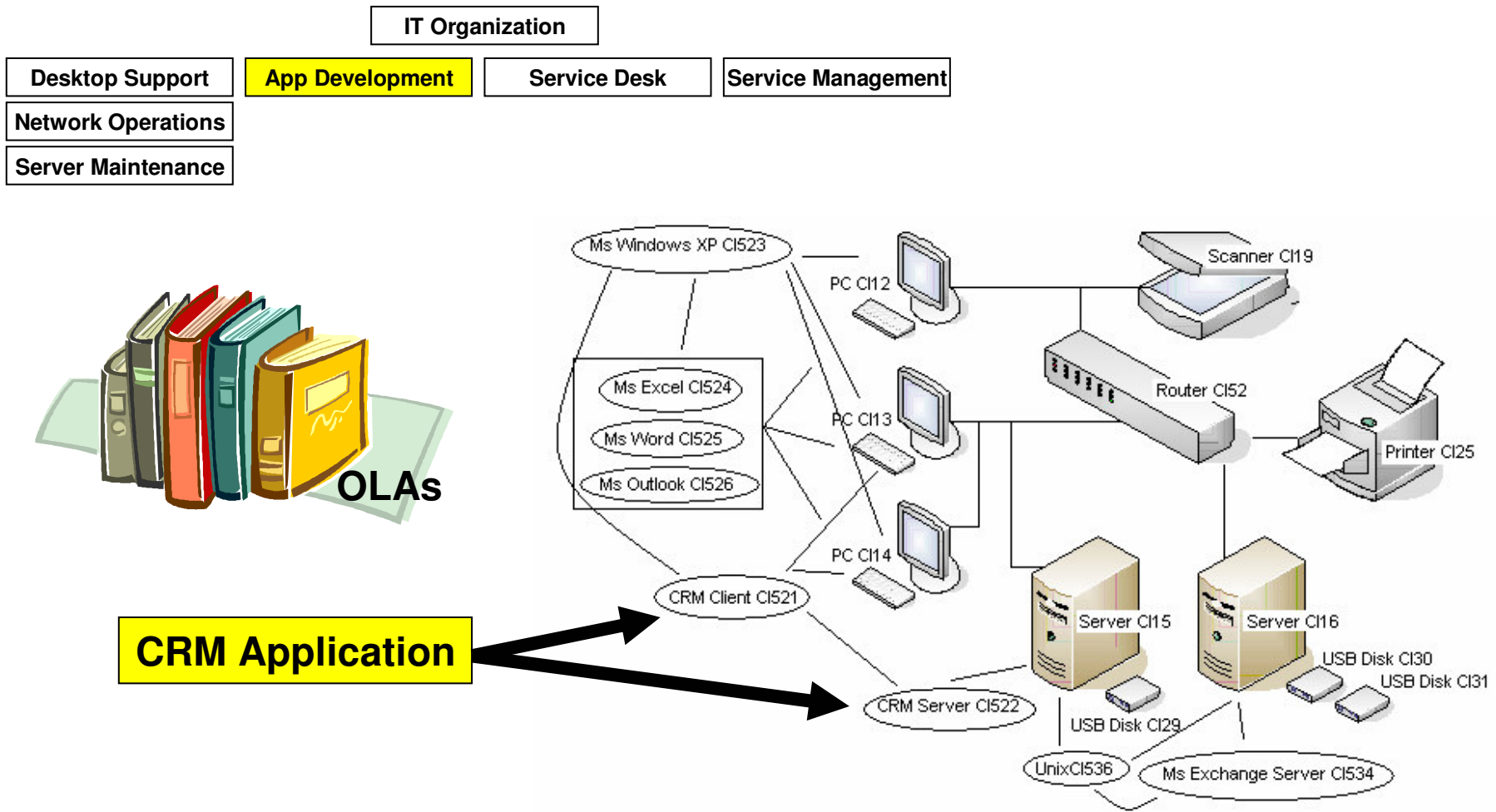
# Document the Form Agreement



**Client Management Service**

	Service Agreement	Eligibility
Ownership:	Service Management	sc, sla, ola
Agreement (components):	Client Management Service	sc, sla, ola
Dependency (components):	CRM application Service Desk	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours ....	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx ....	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx	sc, sla, ola

# Build it Down following Dependencies



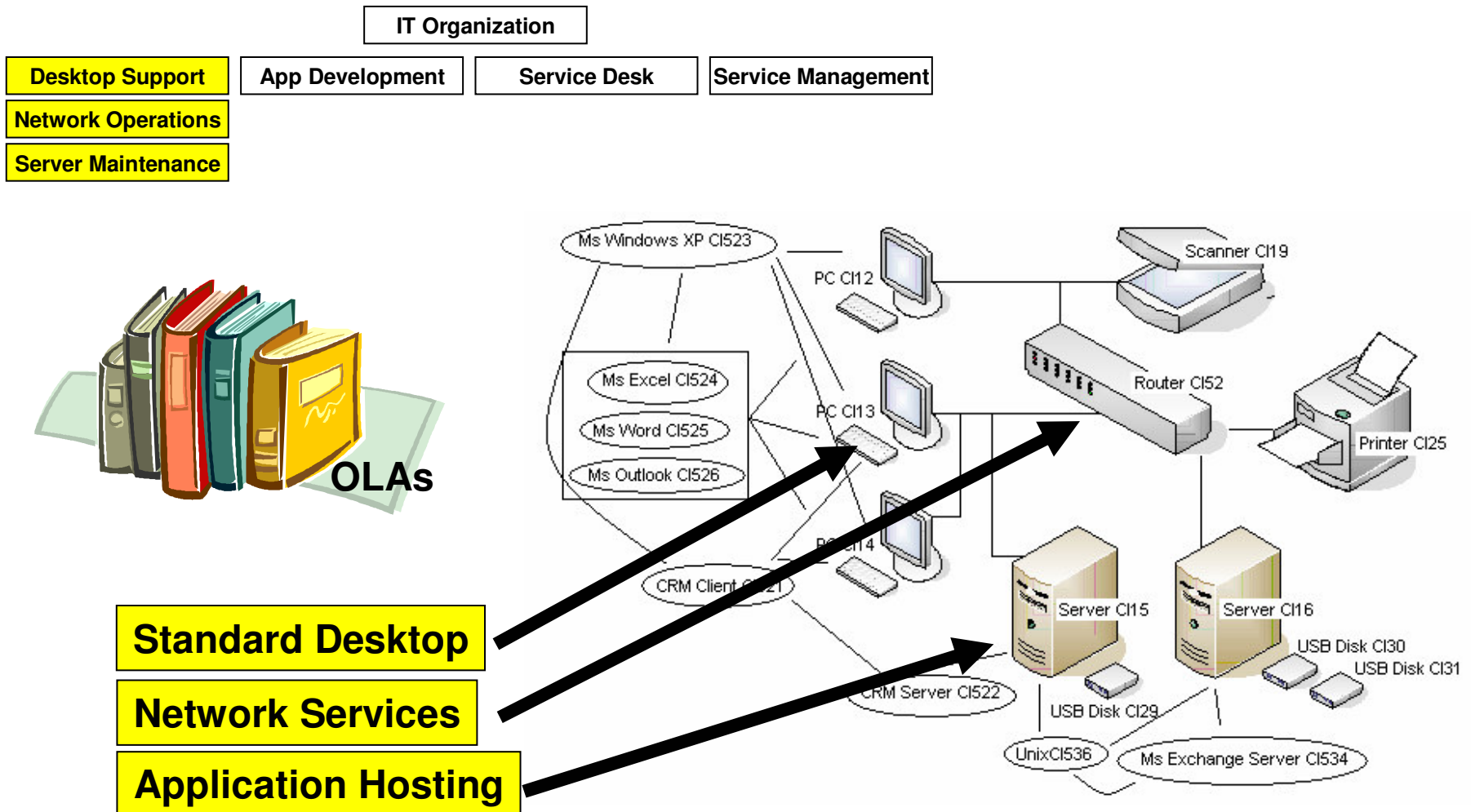
# Document the Form Agreement



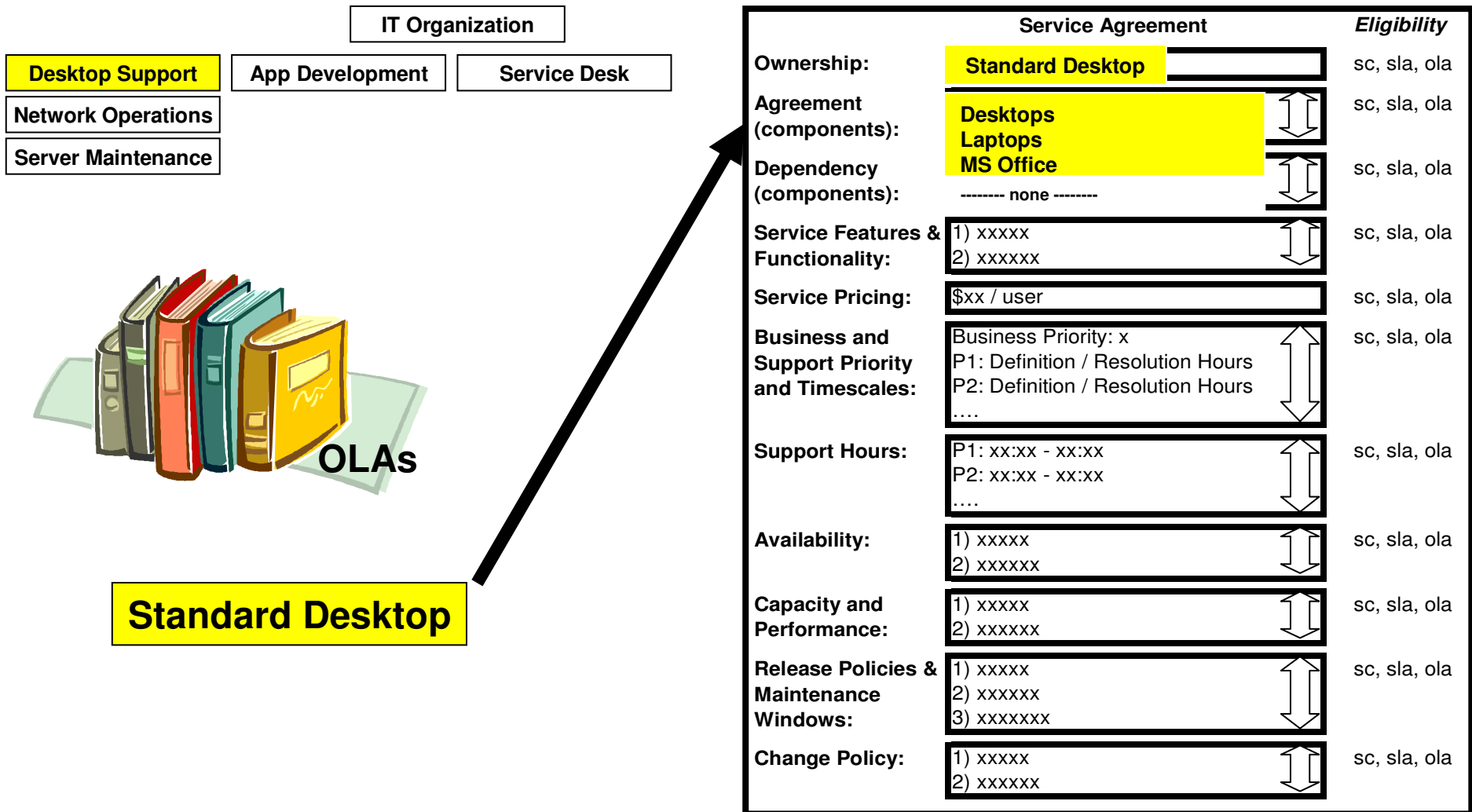
CRM Application

	Service Agreement	Eligibility
Ownership:	App Development	sc, sla, ola
Agreement (components):	CRM Desktop Application CRM Server Application	sc, sla, ola
Dependency (components):	Standard PC Network Server	sc, sla, ola
Service Features & Functionality:		sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours ....	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx ....	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx	sc, sla, ola

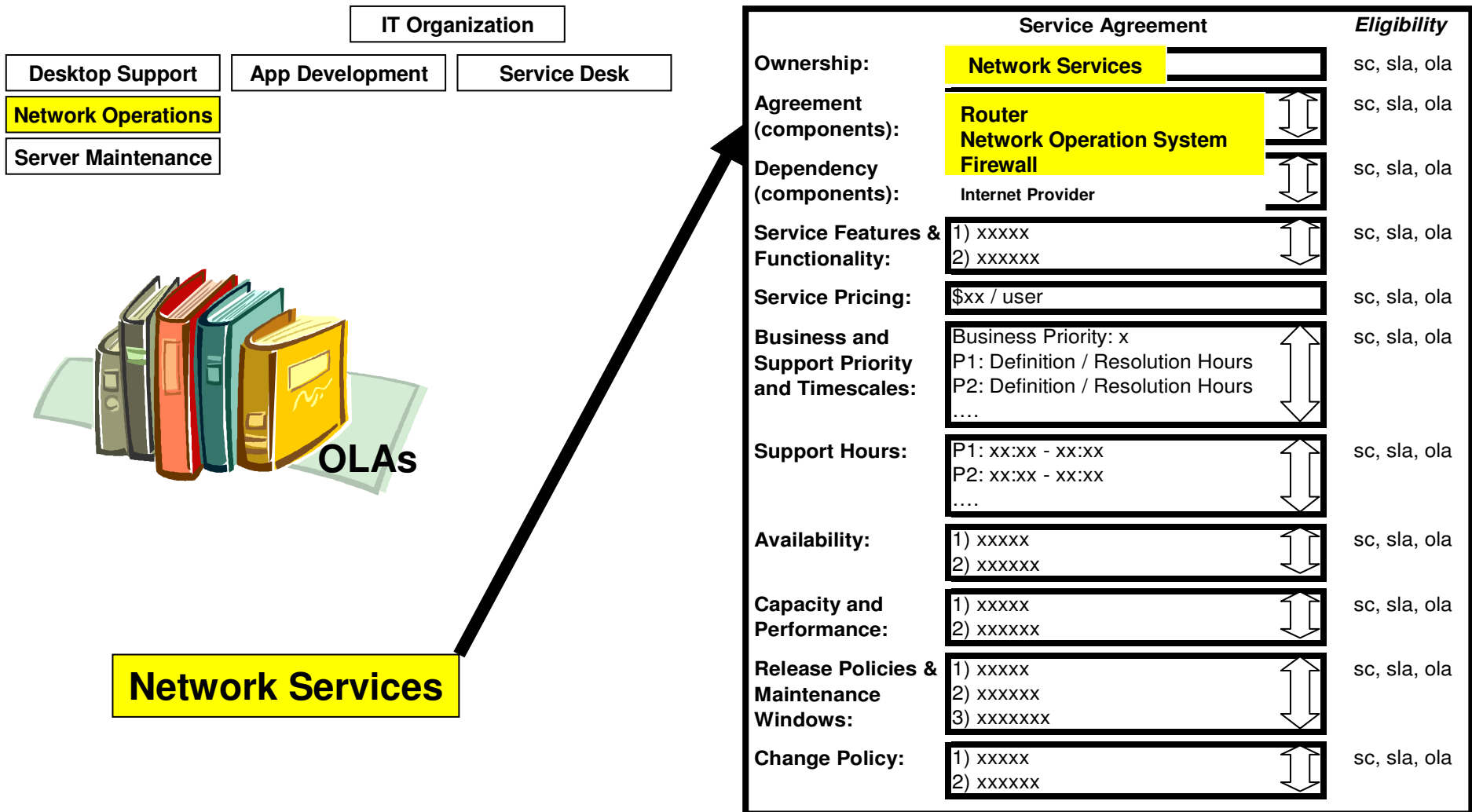
# Build it Down following Dependencies



# Build it Down following Dependencies



# Build it Down following Dependencies





# Build it Down following Dependencies



**Application Hosting**

	Service Agreement	Eligibility
Ownership:	Application Hosting	sc, sla, ola
Agreement (components):	Server xx	sc, sla, ola
Dependency (components):	Unix OS	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours ....	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx ....	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx	sc, sla, ola

# Refine Agreement Content

- Produce and review aggregate reports
- Summarize, identify and address inconsistencies

## Support Hours



<b>Client Management Service</b>	<b>P1 – 1 hour</b>
<b>CRM Application</b>	<b>P1 – 2 hour</b>
<b>Standard Desktop</b>	<b>P1 – .5 hour</b>
<b>Network Services</b>	<b>P1 – .5 hour</b>
<b>Application Hosting</b>	<b>P1 – 1 hour</b>

	Service Agreement	Eligibility
Ownership:	Service Management	sc, sla, ola
Agreement (components):	Client Management Service	sc, sla, ola
Dependency (components):	CRM application Service Desk	sc, sla, ola
Service Features & Functionality:	1) xxxxx 2) xxxxxx	sc, sla, ola
Service Pricing:	\$xx / user	sc, sla, ola
Business and Support Priority and Timescales:	Business Priority: x P1: Definition / Resolution Hours P2: Definition / Resolution Hours ....	sc, sla, ola
Support Hours:	P1: xx:xx - xx:xx P2: xx:xx - xx:xx ....	sc, sla, ola
Availability:	1) xxxxx 2) xxxxxx	sc, sla, ola
Capacity and Performance:	1) xxxxx 2) xxxxxx	sc, sla, ola
Release Policies & Maintenance Windows:	1) xxxxx 2) xxxxxx 3) xxxxxxxx	sc, sla, ola
Change Policy:	1) xxxxx 2) xxxxxx	sc, sla, ola

# Summary

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1. Use Documents and Spreadsheets as modeling tools to brainstorm ideas and to outline Templates
2. Add templates as records in a database managed as forms
  - Use common templates and fields with checkboxes to designate data as being appropriate at the Catalog, SLA, or OLA levels
3. Relate forms using a service structure flowing from the top service component through dependent configuration components
4. Summarize, analyze, adjust and align field content

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# Thank You!

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