Putting the PRO in Process Design

ITSM ACADEMY
…educate & inspire®

#askitsm

@ITSMAcademy

info@itsmacademy.com

www.itsmacademy.com
www.itsmprofessor.net

Donna Knapp
@ITSM_Donna

Welcome!

ITSM Academy

- Full service provider of IT Service Management (ITSM) education and advice
- Accredited and sustainable education and training
  - ✓ ITIL®
  - ✓ Process Design (CPDE)
  - ✓ DevOps
  - ✓ Agile Service Management
  - ✓ ISO/IEC 20000

Donna Knapp

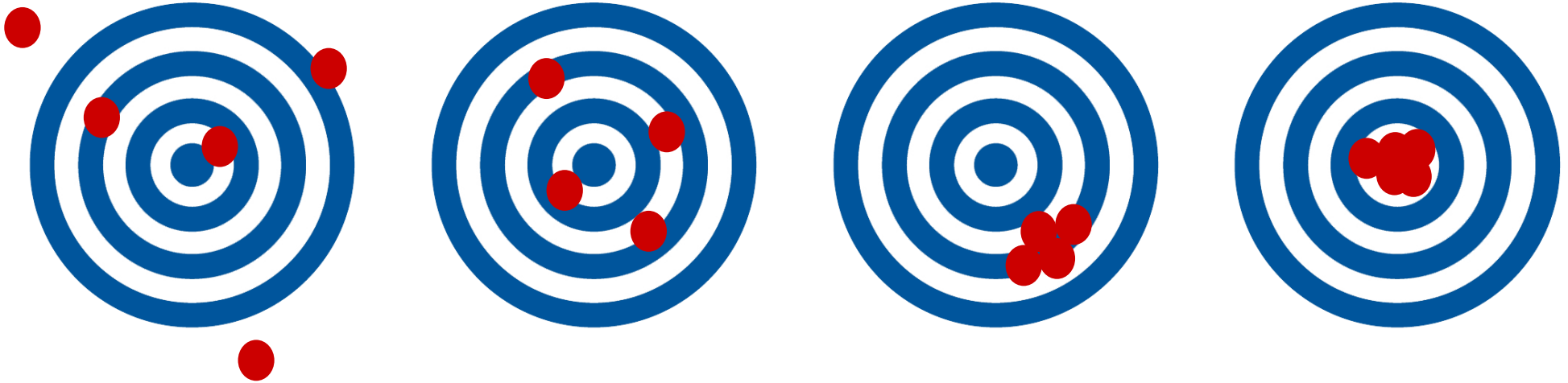
- Author
- Curriculum Development Manager
- Certified Process Design Engineer
- ITIL Expert, ITIL Practitioner
- DevOps Foundation, DTE, DOL
- Certified Scrum Master
- Certified Agile Process Owner
- Certified Agile Service Manager
- Certified ISO/IEC 2000 Consultant/Manager
- Certified in Knowledge-Centered Support (KCS) Principles

Why Processes are Important

Successful processes are repeatable.

Repeatability is essential to measure process effectiveness, efficiency and improvement.

Ad-hoc



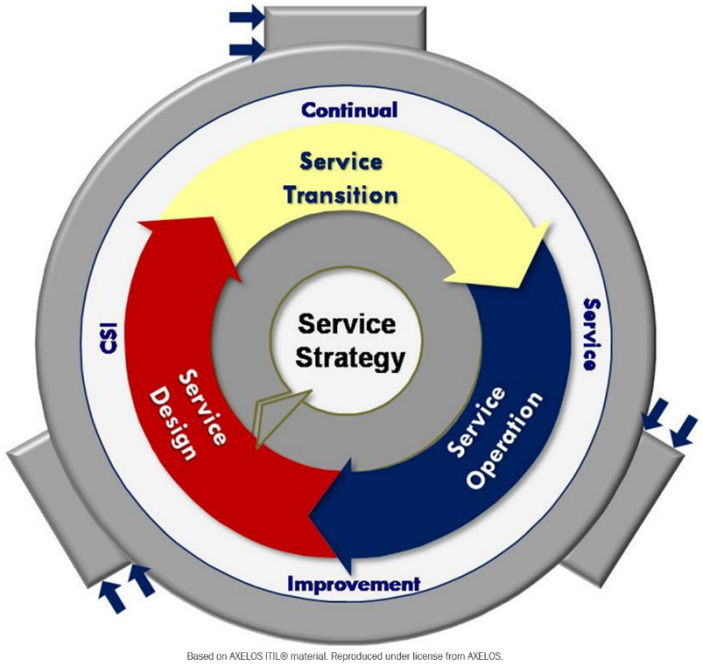
Effective
Efficient
Repeatable

Why Processes *aren't* Important

They represent only one piece of the puzzle.

Putting the puzzle together requires system thinking.

IT service management (ITSM) is an integrated process approach that enables an IT organization to deliver services that meet business and customer requirements



Systems Thinking

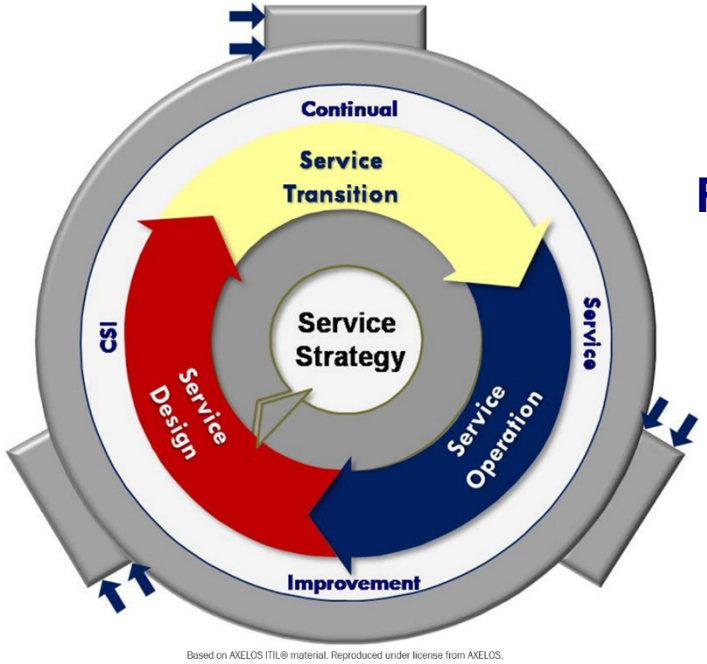
Systems thinking is a management discipline that concerns an understanding of a system by examining the linkages and interactions between the components that comprise the entirety of that defined system.

ITSM Processes are part of a Greater Value Stream

A value stream is the sequence of activities required to design, produce, and deliver a specific good or service.

Requirements to Release

Strategy to Service Portfolio



Based on AXELOS ITIL® material. Reproduced under license from AXELOS.

Request to Fulfillment

'Defect' to Correct

Customer Request

Value Stream

Process | **Process** | **Process**

Valuable Good or Service Delivered

Methodologies and Frameworks Help Us Make Sense (1)

Total Quality Management (Deming Cycle)

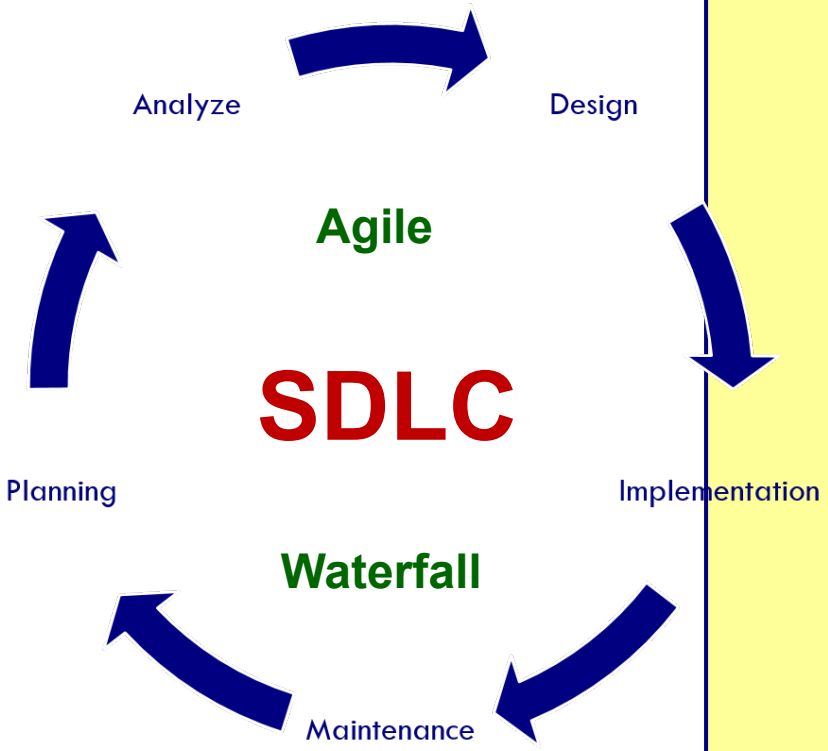
IT Service Management (ISO/IEC 20000)

ITIL

COBIT

KCS

Methodologies and Frameworks Help Us Make Sense (2)



Total Quality Management (Deming Cycle)

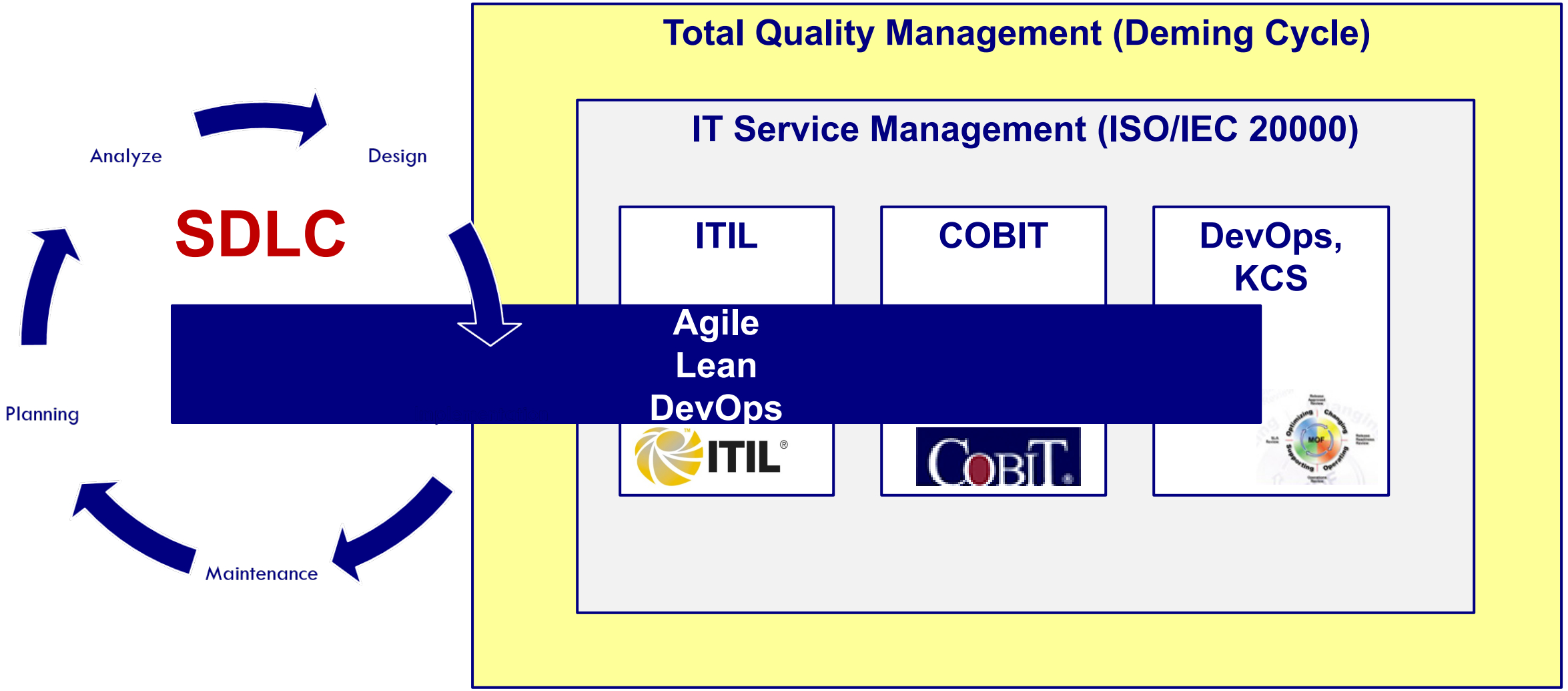
IT Service Management (ISO/IEC 20000)

ITIL

COBIT

DevOps, KCS

Methodologies and Frameworks Help Us Make Sense (3)

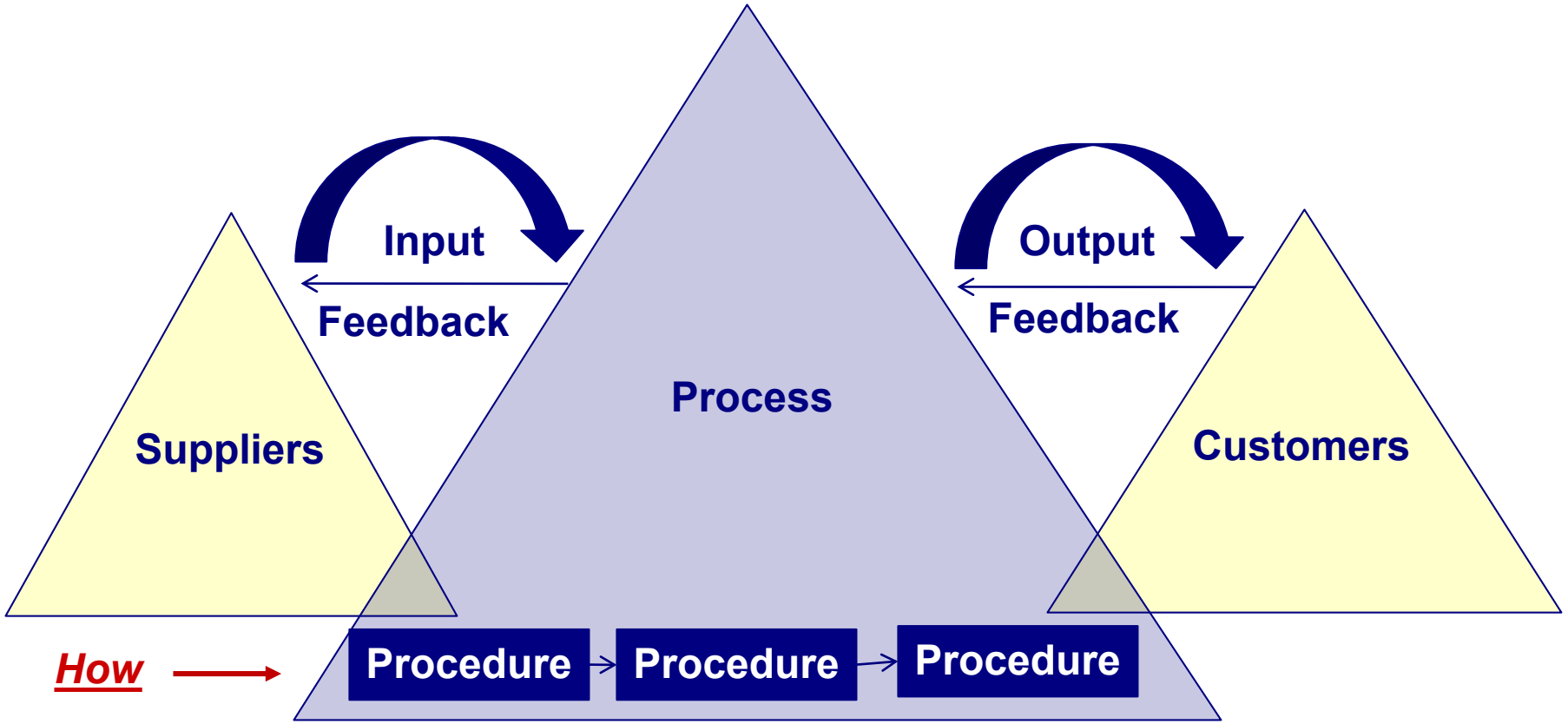


Best practice is to choose the method, or hybrid of methods, that best serves the needs of your business and customers and adapt those methods to your organization's circumstances, needs and goals.

Develop a shared vocabulary!

A Process is an Integrated Set of Activities

Processes define <u>what</u> work to do to satisfy your customers' requirements.



Every process is perfectly designed to get the outcome it gets.

If you don't have a well-designed process (i.e., if you are not satisfying your customers' requirements), it should not be a surprise that your customers are dissatisfied.

Separating the What from the How

Traditional ITSM

- Change is requested
- CAB approved
- Incidents are logged, escalated and resolved
- Dev and Ops use different tracking systems

DevOps

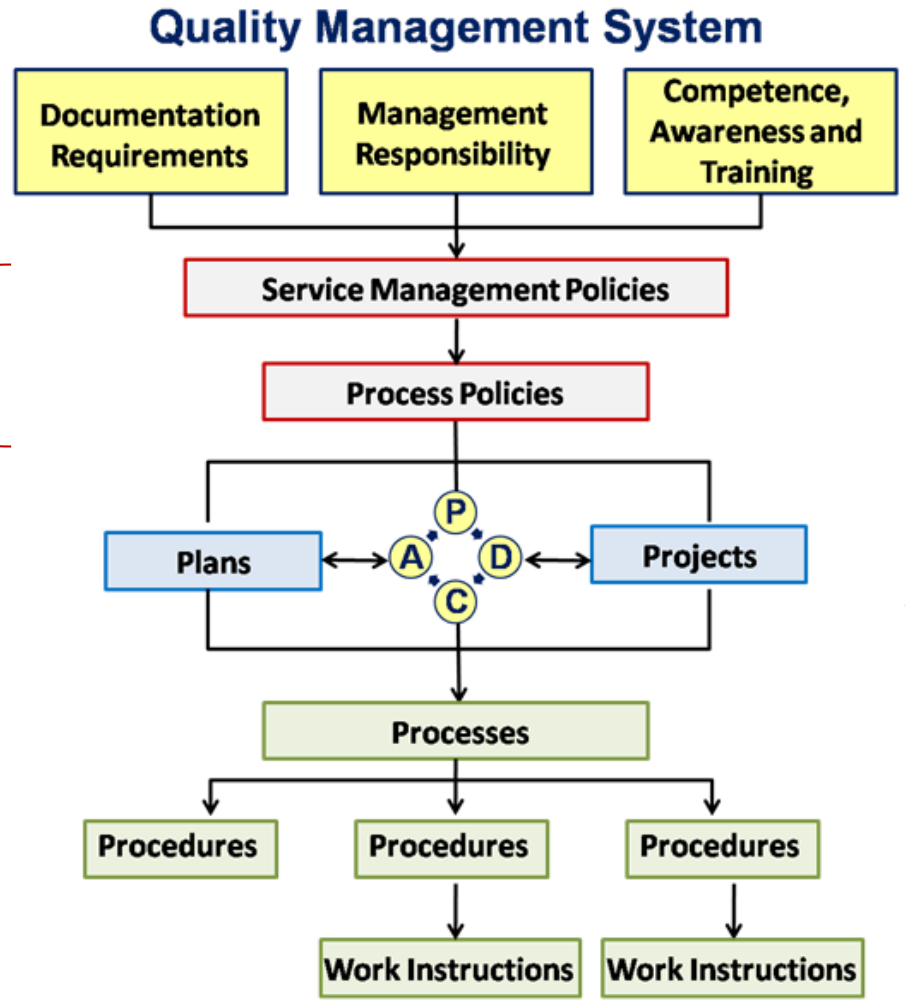
- Change is recorded
- CAB is notified
- ChatOps is used to record and swarm incidents
- Systems are integrated (e.g., incidents and problems are reflected in the product backlog and defect tracking systems)

The goal is not to improve one measurement in isolation. The goal is to reduce operational expenses AND reduce inventories and increase throughput simultaneously.

Eliyahu M. Goldratt

Top Down Approach

Shared Understanding? (Guardrails)



Controls? (Constraints)

Leverage Agile Service Management Techniques

- **Requirements Definition**
  - ✓ Determine management's vision and level of commitment
  - ✓ Establish project and form a project team
  - ✓ Define process and identify customer requirements
- **Process Analysis**
  - ✓ Document 'as is' process and baseline current performance
  - ✓ Assess conformance to customer requirements
  - ✓ Benchmark current performance
- **Process Design and Implementation**
  - ✓ Design or redesign process
  - ✓ Solicit feedback, fine-tune and finalize the design
  - ✓ Implement the new design
- **Continual Process Improvement**
  - ✓ Assess performance and continually improve

Process Planning Meeting

Strategic Sprint

Process Activity Sprints

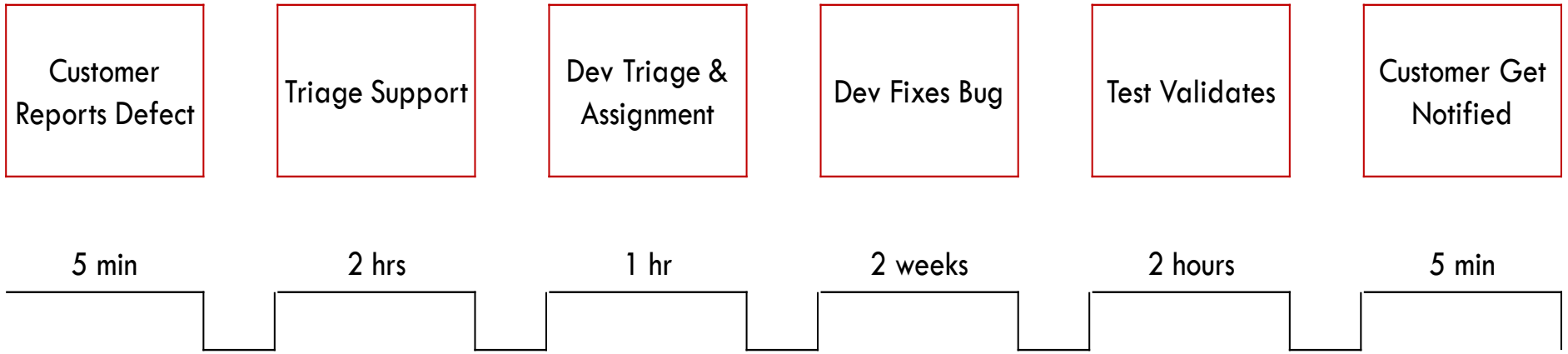
CSI Sprints

Use Agile Service Management practices and the Ten Process Design and Improvement Steps to redesign or reengineer processes.

Source: *The ITSM Process Design Guide*

Leverage Lean Techniques

Shrinking time reduces cost, improves productivity, and increases quality.



Total Processing Time = 2 weeks, 5 hours, 10 mins

Experiment

DevOps

- Change is recorded
- CAB is notified

- ChatOps is used to record and swarm incidents

- Systems are integrated (e.g., incidents and problems are reflected in the product backlog and defect tracking systems)

- Baseline your performance
- Observe a challenge area
- Design and conduct an experiment
- Analyze the results
- Present a reasoned argument

"Without data, you're just another person with an opinion."

W. Edwards Deming

A reasoned argument is the chain of credible evidence that supports an assertion or claim.

Managing the Change

Organizational Change Management (OCM) is the process of preparing, motivating and equipping people to meet new business challenges

- New processes will require stakeholders to
  - ✓ Assume new responsibilities
  - ✓ Learn new skills
  - ✓ Adopt new behaviors

- OCM must
  - ✓ Explain why the change is needed
  - ✓ Encourage support
  - ✓ Help people understand how to change
  - ✓ Provide education and training

Lessons Learned

1. Honor the past but don't be bound by it
2. Accept your current reality
3. Understand that local optimization can cause global degradation
4. If you're doing things wrong and you automate them, you'll do them wrong faster
5. You must make changes with people and for people…not to people communicate

Leading the Transformation

Transformations require structural, people-oriented and process-oriented changes.

- Process changes are the DNA of a transformation
- The ultimate goal is to optimize the flow of work
- *Then* decide how and when to embed automation into the process
- Automate to free up capacity

"The transformation can only be accomplished by man [and woman], not by hardware (computers, gadgets, automation, new machinery). A company can not buy its way into quality."

W. Edwards Deming

A process design PRO…

1. Understands what a process is and the role it plays in its value stream
2. Steals shamelessly from existing frameworks and standards
3. Is an expert in process design and improvement
4. Is an organizational change management champion
5. Knows how to
   - ✓ Optimize flow
   - ✓ Conduct and learn from experiments
   - ✓ Present a reasoned argument

Want to Learn More?

ITSM ACADEMY
...educate & inspire®

ITSM-related Frameworks and Standards

What to do

ITIL® DevOps FD

CPDE
Certified Process Design Engineer
How to do it
(Process Design and Improvement)

CASM

Certified Agile Service Manager
How to do it using Agile (Scrum) practices

CAPO

Certified Agile Process Owner
How to manage it using Agile (Scrum) practices

Certified Process Design Engineer (CPDE)®

- Understands an organization's IT service management capabilities, level of maturity and improvement opportunities
- Understands and promotes the use of relevant best practice frameworks and standards
- Serves as subject matter expert on matters involving process design and improvement
- Coordinates and facilitates process design and improvement activities using proven tools and techniques
- Leads continual process improvement, quality management and organizational change management activities and serves as change champion

Agile Service Management Roles

CASM and CAPO are both role-based qualifications.

Certified Agile Service Manager (CASM)®	Certified Agile Process Owner (CAPO)®
▪ Operational equivalent of a Scrum Master ▪ Responsible for ensuring Agile Service Management theory, practices and rules are understood	▪ Operational equivalent of a Scrum Product Owner ▪ Responsible for maximizing the value of a process and the work of the process improvement team

Both are grounded in Agile Service Management which involves adapting Agile and Scrum values and practices to IT Service Management (ITSM) processes and process design and improvement activities.

What to Learn More?

DevOps Campus ...at ITSM Academy

DevOps Foundation

Pre-requisite

DevOps Practitioner Series

DevOps Test Engineering

DevOps Leader

Continuous Delivery Architecture

DevSecOps Engineering

Visit our website for our full class catalog and public class dates.

Thank You for Attending!

#askitsm

@ITSMAcademy

info@itsmacademy.com

www.itsmacademy.com

www.itsmprofessor.net

www.devopsprofessor.net