Michael Cardinal
BPMO Lead
Thirdera

- 30 years Education and Training

- Multiple Industries

- ITIL 1-4 Certified

- CPDE®

- Six Sigma Certified

- ServiceNow Certified

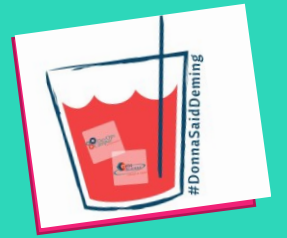- Woodworker

- Lover of all things Celtic

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Hey ITIL 4!
My processes are gone!
What have you done with them?

Don't Panic! Grab you towel! 42!

The processes have matured and blossomed into practices!

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"

If you cannot describe what you do as a *practice**[sic], you do not know what you do…

W. Edwards Deming

* Edit mine

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#DonnaSaidDeming

What did Deming mean?

Work <u>outcomes</u> (value) need to be determined before identifying <u>who</u> will do the work

- **Work**:
  - Identify what outcomes you need to achieve
  - Determine what tasks, actions or activities are needed to achieve the outcomes
- **Role**:
  - Group like tasks, actions or activities within a value chain to determine "roles"
- **Competency**:
  - What skills or talents are needed to accomplish the tasks, actions or activities?
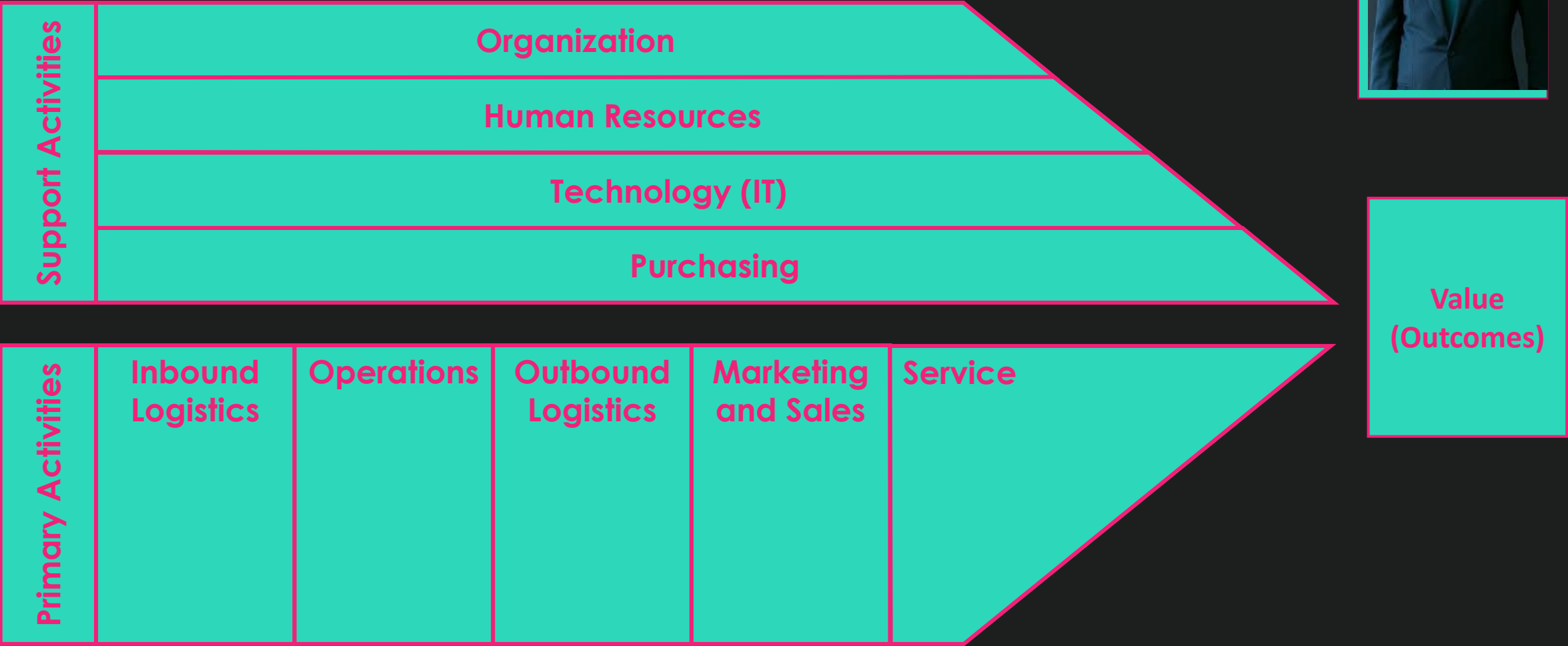- **Personnel:**
  - Who has the skills or talents required?

Value Chains & Streams

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Value Chain (Michael Porter)

Support Activities

- Organization
- Human Resources
- Technology (IT)
- Purchasing

Primary Activities

Inbound Logistics	Operations	Outbound Logistics	Marketing and Sales	Service

Value (Outcomes)

Enterprise Value Chain

Business Mission, Vision & Strategy

Corporate Governance

Core Business Processes

Suppliers | Market | Research | Develop | Acquire | Build | Fulfill | Brand | Sell | Support | Customers

Support Business Processes

Information Management

Technology Development

Human Resource Management

Finance & Accounting

Quality & Business Excellence

Safety, Health & Environment
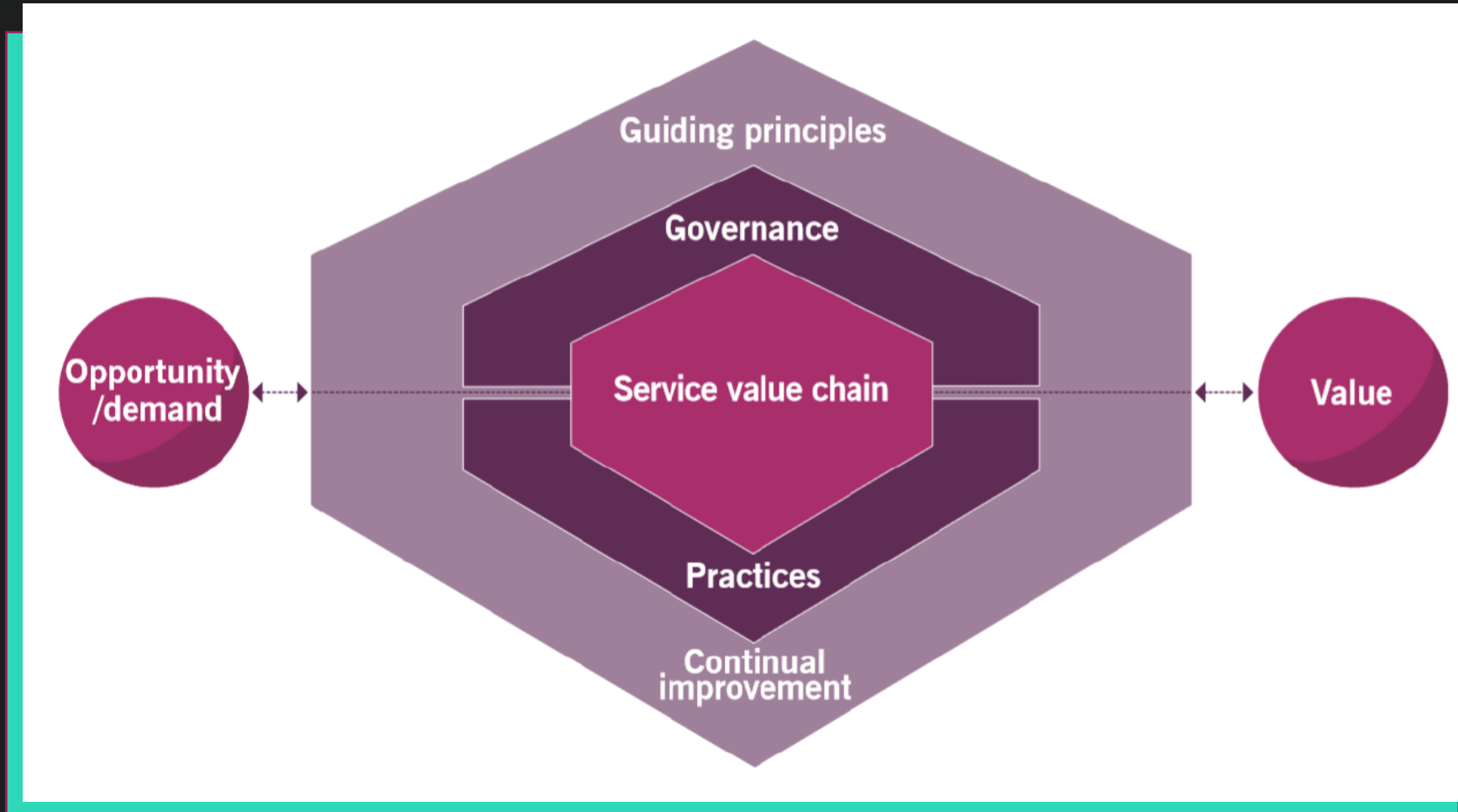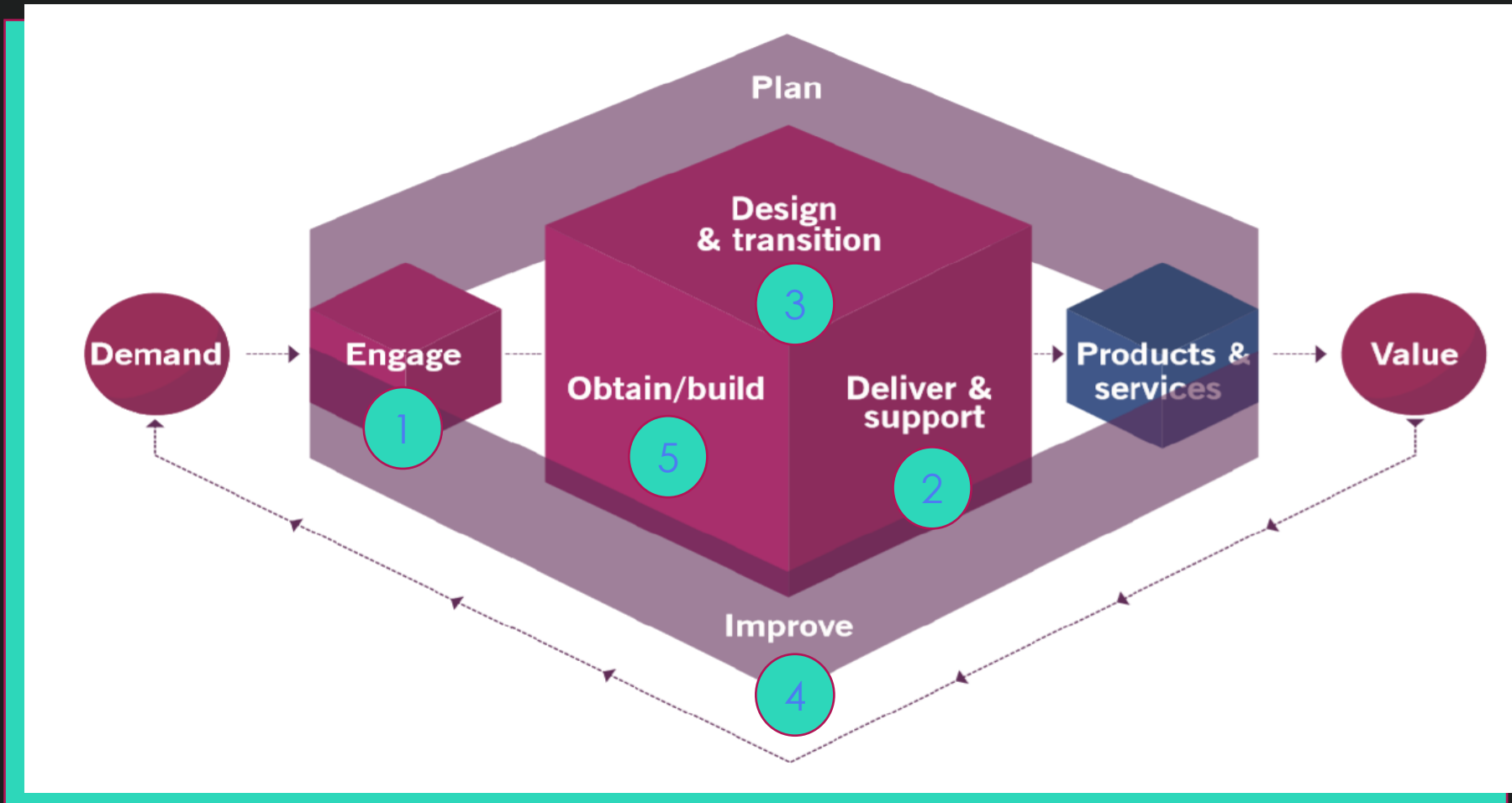
Combined Value Chain

Inbound Logistics	Production Process	Outbound Logistics	Marketing	Sales	Activities
					Plan
					Do
					Check
Act					Act

Value Stream System-ITIL 4

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Value Chain-ITIL 4
(Incident Management Stream)

Practices and Processes

Practices (34)

Set of organizational resources designed for performing work or accomplishing an objective

General Management	Service Management	Technology Management
Architecture Management	Availability Management	Deployment Management
Continual Improvement	Business Analysis	Infrastructure and Platform Management
Information Security Management	Capacity and Performance Management	Software Development and Management
Knowledge Management	Change Enablement	
Measurement and Reporting	Incident Management	
Organizational Change Management	IT Asset Management	
Portfolio Management	Monitoring and Event Management	
Project Management	Problem Management	
Relationship Management	Release Management	
Risk Management	Service Catalogue Management	
Service Financial Management	Service Configuration Management	
Strategy Management	Service Continuity Management	
Supplier Management	Service Design	
Workforce and Talent Management	Service Desk	
	Service Level Management	
	Service Request Management	
	Service Validation and Testing	

Practice Taxonomy

Each practice may include one or more processes and activities that may be necessary to fulfill the purpose of that practice.

Principles; Scope; PSFs; Lifecycle

Roles Competencies Responsibilities

Process (what)

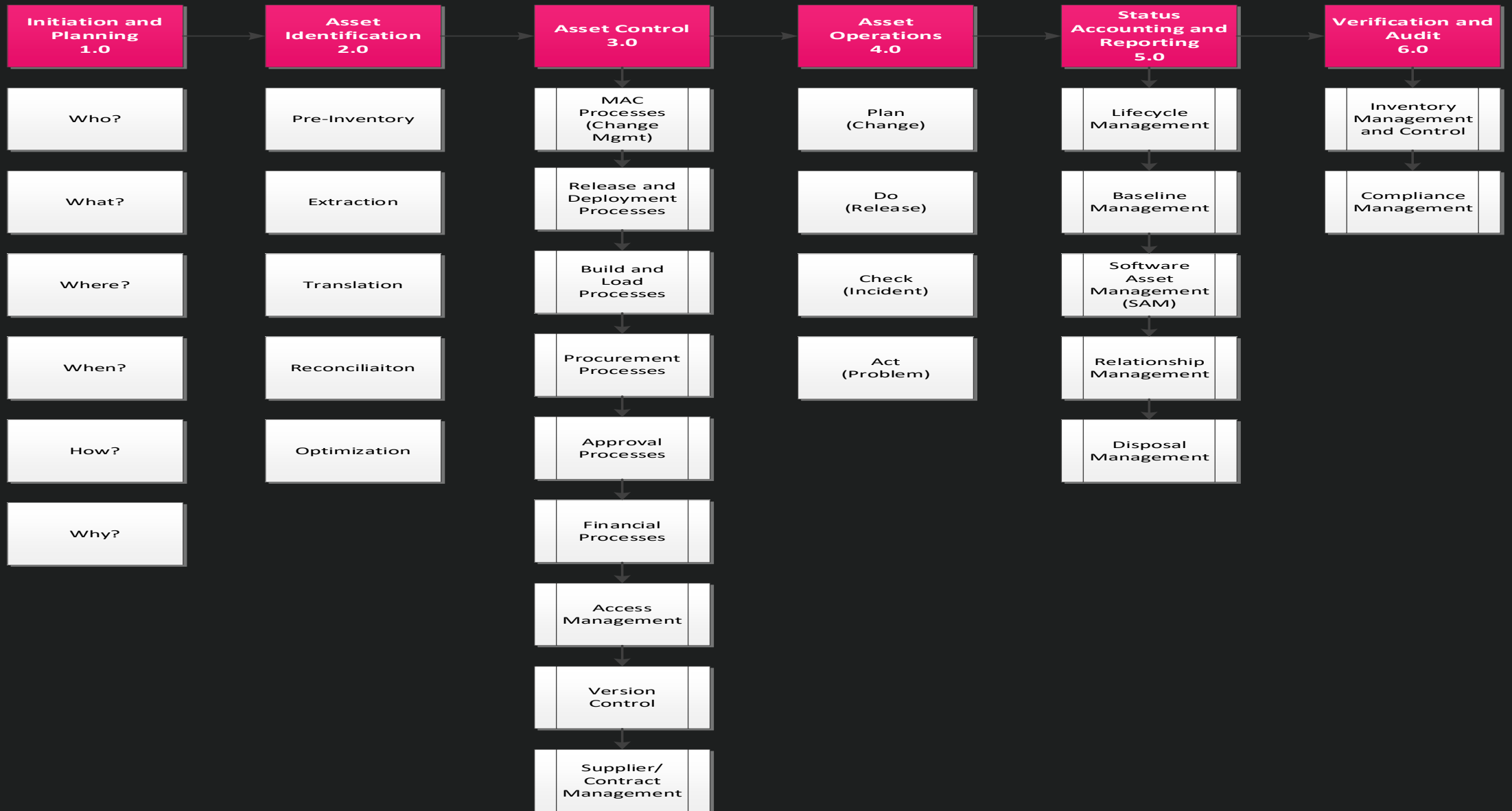Process (what)

Procedure

Procedure (how)

Procedure

Work Instruction

Work Instruction (tool)

Job Aid (work)

Work Instruction

CPI; Measurement and Metrics

Initiation and Planning 1.0	Asset Identification 2.0	Asset Control 3.0	Asset Operations 4.0	Status Accounting and Reporting 5.0	Verification and Audit 6.0
Who?	Pre-Inventory	MAC Processes (Change Mgmt)	Plan (Change)	Lifecycle Management	Inventory Management and Control
What?	Extraction	Release and Deployment Processes	Do (Release)	Baseline Management	Compliance Management
Where?	Translation	Build and Load Processes	Check (Incident)	Software Asset Management (SAM)	
When?	Reconciliaiton	Procurement Processes	Act (Problem)	Relationship Management	
How?	Optimization	Approval Processes		Disposal Management	
Why?		Financial Processes			
		Access Management			
		Version Control			
		Supplier/ Contract Management			

Organizational Change Management

10 Step Measurement Program (from CPDE®)

Step 1 - Determine management's vision

Step 2 - Identify critical success factors

Step 3 - Identify key performance indicators

Step 4 - Identify metrics

Step 5 - Verify that metrics are SMART

Step 6 - Identify required data elements

Step 7 - Test and pilot your metrics and reports

Step 8 - Document your metrics and reports

Step 9 - Place metrics and reports under change management control

Step 10 - Continually review metrics for effectiveness

Documenting a Process-Alternative Approach

- Hand out index cards (or some digital equivalent)
- Have people write down the steps they follow to accomplish and outcome
  - Do not guide, cajole, urge, or pressure people in how they do things
- Collect all the cards
- Find the common steps among the cards
- Document the flow
- Voila!

Roles

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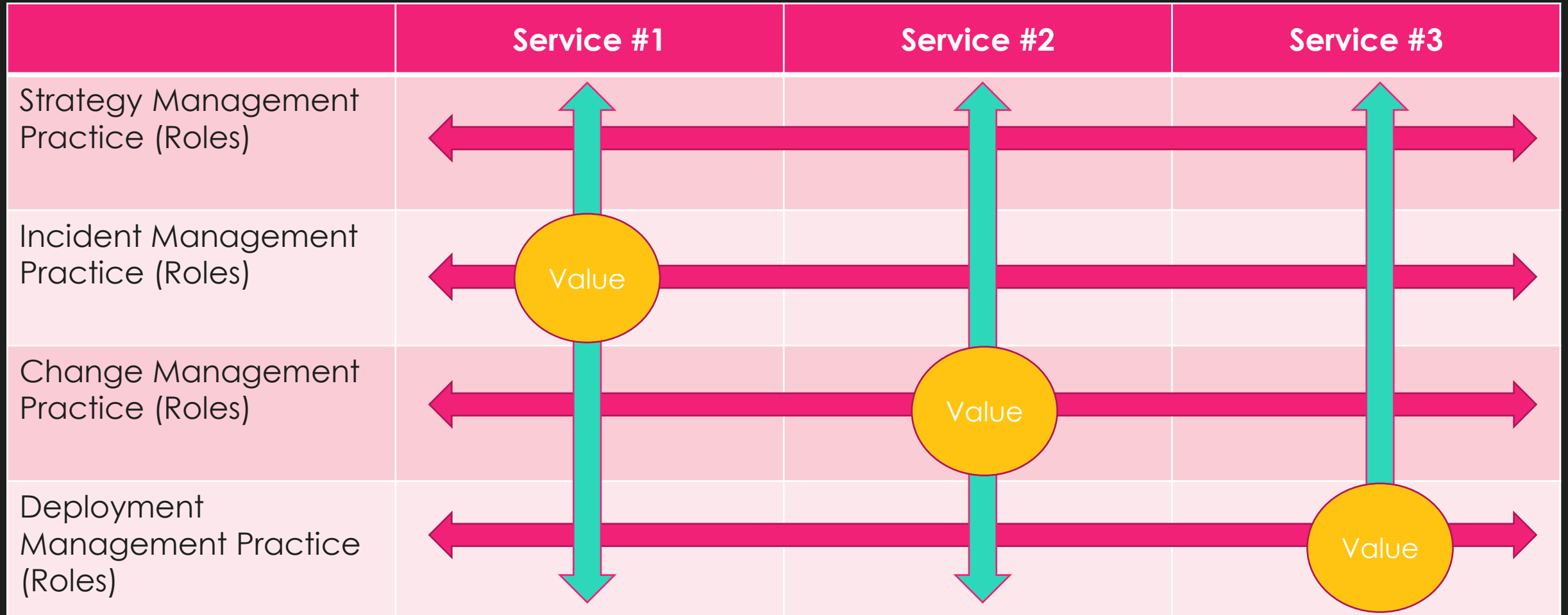
Owners vs Doers

Care and Feeding (Outside)	Doing and Executing (Inside)
Practice Owner Process Owner Service Owner	Practice Manager Practice Practitioners Process Manager Process Practitioners Service Manager Service Practitioners

Role Considerations

- **Job Titles**
  - Labels others (i.e., HR) give us or that we give ourselves that place us in the "pecking order"
  - One job title per person (in general)
  - Filled by people looking for their place in the world

- **Roles**
  - "Hats" we wear or "parts" we play
  - Multiple roles per person (personal and professional)
  - Filled by those with the talents and skills to do the work

- **Role Names**
  - Should reflect the work, not the hierarchy
  - E.g., 'Call Taker/Handler', not 'Level 2 Network Technical Response Analyst'
    - 85% of people with the title 'Analyst' do no analysis

Competencies

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First, Break All the Rules -Marcus Buckingham

- TALENTS VS SKILLS
  - Talents are inherent
  - Skills are learned
- Talent types
  - Striving: Explains the WHY of a person
  - Thinking: Explains the HOW of a person
  - Relating: Explains the WHO of a person

"Talents are rare and special"
-Marcus Buckingham

Multiple Intelligences-Howard Gardner

- Verbal-Linguistic
- Logical -Mathematical
- Musical
- Visual-Spatial
- Bodily-Kinesthetic
- Interpersonal
- Intrapersonal
- Naturalist
- Existential

"An intelligence is the ability to solve problems, or to create products, that are valued within one or more cultural settings"
-Howard Gardner

Competencies (Talents and Skills)

Competency Name	Competency Description
Leader	Decision-making, delegating, overseeing other activities, providing incentives and motivation, and evaluating outcomes
Administrator	Assigning and prioritizing tasks, record-keeping, ongoing reporting, and initiating basic improvements
Coordinator/Communicator	Coordinating multiple parties, maintaining communication between stakeholders, and running awareness campaigns
Methods and Techniques Expert	Designing and implementing work techniques, documenting procedures, consulting on processes, work analysis, and continual improvement
Technical Expert	Providing technical (IT) expertise and conducting expertise-based assignments

Skills

- **Strategic Thinking**
- **Tactical Thinking**
- **Operation Thinking**
- **Platform records creation, modification, usage, and management**
- **Road mapping/Vision-casting**
- **Critical Thinking**
- **Questioning**
- **Decision Making**
- **Accountability and Ownership**
- **Relationship Management**
- **Communication (Written and Verbal)**

Summary

- Processes still exist in ITIL 4—as a vital part of practices
- Start with the value you want to produce
- Determine the work needed to achieve the value
- Document the work as a flow (process)
- Identify the roles to perform the work
- Determine the competencies needed to perform the role
- Find the people with the talents and skills to do the work

Connect with Thirdera

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