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\textbf{fig. 1}

\textbf{fig. 2}

\section{Understanding Service Management}
fig. 3

Directly supports a business process

Sensitive Data Encryption
Supporting Service

IT

CLOUD STORAGE

External Customer-Facing Service

CUSTOMERS

fig. 4

Directly supports a business process

Up-to-date issue-resolution protocols

Internal Customer-Facing Service

IT

CLOUD STORAGE

External Customer-Facing Service

CUSTOMERS

Support

CUSTOMER TECH SUPPORT

Customer-Facing Service
The ITIL Service Lifecycle

The ITIL Service Lifecycle

12 | The ITIL Service Lifecycle

13 | Service Strategy

**Number of Planned New Services**
- A percentage indicator quantifying the creation of new services following a strategic review.

**Number of Unplanned New Services**
- A percentage indicator quantifying the creation of new services that were not triggered by strategic review.

**Number of Strategic Initiatives**
- The number of strategic initiatives spurred by the Service Portfolio Management process (another process in the Service Strategy Life Cycle phase that interfaces with ITSM, see the following section).

**Number of New Customers**
- The number of new customers using the service.

**Number of Lost Customers**
- The number of customers that discontinued use of the service.
<table>
<thead>
<tr>
<th></th>
<th>Total Annual Cost</th>
<th>% Used for Tracking</th>
<th>Total Tracking Cost</th>
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<td>Package Scanning Hardware</td>
<td>7.5 M</td>
<td>50</td>
<td>3.75 M</td>
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<td>Labor</td>
<td>28 M</td>
<td>5</td>
<td>1.4 M</td>
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<td>Servers</td>
<td>1 M</td>
<td>15</td>
<td>150 K</td>
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<tr>
<td>Software</td>
<td>100 K</td>
<td>100</td>
<td>100 K</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total Service Cost</td>
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**Adherence to Budgeting Process**

- A percentage indicator of total projects undertaken in relation to projects budgeted.
- Uses the standard IT budgeting process.

**Cost-Benefit Estimation**

- A percentage indicator of total project files in relation to total project files containing cost-benefit estimates.

**Post-Implementation Review**

- A percentage indicator of total projects implemented in relation to total projects in which costs and benefits were evaluated after implementation.

**Adherence to Approved Budget**

- A percentage indicator of total IT expenses in relation to expenses exceeding approved IT budget.

**Adherence to Project Resources**

- A percentage indicator of total project expenses in relation to budgeted amounts.

**Proposals for Cost Optimization**

- A number of proposals made by Financial Management aimed at improving financial economy of the project.
**Number of Customer Complaints**
- The total number of received customer complaints.

**Number of Accepted Customer Complaints**
- The total number of customer complaints that were determined to be justified.

**Number of Customer Satisfaction Surveys**
- The total number of Customer Satisfaction Surveys deployed during a specific reporting period.

**Percentage of Returned Questionnaires**
- The percentage of returned questionnaires in relation to the total number of questionnaires deployed during a specific reporting period.

**Customer Satisfaction Per Service**
- This is a service-specific customer satisfaction measurement, including standard deviation.
- Determined by Customer Satisfaction Surveys.

---

**Service Design**

**Services Covered by SLAs**
- The number of services covered by SLAs.

**Services Covered by OLAs/UCs**
- The total number of services in which SLAs are supported by OLAs/UCs.

**Monitored SLAs**
- The number of SLA-defined services that are being monitored for shortcomings.

**SLAs Under Review**
- The number of SLA-defined services subject to regular review.

**Fulfillment of Service Levels**
- The number of SLA-defined services for which the agreed-upon service levels are being fulfilled.

**Number of Service Issues**
- The number of issues in a service provision that are identified and in the process of being resolved by an improvement plan.
Incidents Due to Capacity Shortages
- The number of incidents occurring due to shortages of IT resources or component capacity.

Exactness of Capacity Forecast
- A comparison of predicted capacity and resulting capacity.

Capacity Adjustments
- The number of adjustments made to service and component capacity in response to changing demand.

Unplanned Capacity Adjustments
- The number of unplanned adjustments made to service and component capacity in response to capacity bottlenecks.

Resolution Time of Capacity Shortage
- The time required to resolve capacity bottlenecks.

Capacity Reserves
- The percentage of excess capacity measured during both normal and peak demand times.

Percentage of Capacity Monitoring
- The percentage of services being monitored for capacity.

Service Availability
- A relative measurement of services actually available in relation to those promised in SLAs and OLAs.

Number of Service Interruptions
- The number of interruptions in service.

Duration of Service Interruptions
- The average length of time between the beginning of a service interruption and its resolution.

Availability Monitoring
- A percentage measurement of total services and infrastructure components in relation to those being monitored for availability.

Availability Measures
- The number of measures implemented to increase availability.
Business Processes with Continuity Agreements

- The percentage of business processes that have been assigned explicit continuity targets.

Gaps in Disaster Preparation

- The number of unresolved preparation gaps that could cause problems in the event of a disaster.
- These are major threats without defined countermeasures.

Implementation Duration

- The implementation time measured from the time at which a disaster-related risk is identified to the time at which the risk has been fitted with a suitable continuity mechanism.

Number of Disaster Practices

- The number of disaster practice drills executed.

Number of Identified Shortcomings during Disaster Practices

- The number of shortcomings identified during preparation for disaster events.

Number of Implemented Preventive Measures

- The number of preventative security measures implemented in the response to information security threats.

Implementation Duration

- The duration of time between first identification of a security threat and the implementation of suitable countermeasures.

Number of Major Security Incidents

- The number of security threats organized by degree of severity.

Number of Security-Related Downtimes

- The number of times an incident interrupted or reduced the availability of service.

Number of Security Tests

- The number of security tests and trainings carried out.

Number of Identified Shortcomings during Security Tests

- The number of security shortcomings identified during tests.
**Number of Agreed-Upon UCs**
- The percentage of contracts underpinned by UCs.

**Number of Contract Reviews**
- The number of contract and supplier reviews.

**Number of Identified Contract Breaches**
- The number of times contractual obligations were breached by suppliers.

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**Service Transition**

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**Number of Major Changes**
- The number of major changes that were assessed by the CAB.

**Number of CAB Meetings**
- The number of times the CAB met during execution of the Change Management function's undertaking.

**Time for Change Approval/Rejection**
- The amount of time to approve or reject proposed change as presented in the RFC.

**Change Acceptance Rate**
- The number of changes that won approval in relation to the total number of RFCs submitted.

**Number of Emergency Changes**
- The number of Emergency Changes assessed by the Emergency Change Advisory Board (ECAB).
**Number of Projects**
- The number of major release rollouts overseen by Project Management.

**Percentage of Projects with Project Charters**
- A percentage of projects that began only after a completed and signed Project Charter had been procured.
- Project Charters outline the objectives of the project, identify the stakeholders and appoint a Project Manager.

**Number of Changes to the Project Charter**
- The number of changes to the Project Charter after the start of the project.

**Adherence to Project Budget**
- A measurement of planned budget vs. actual expenditures, including both financial and personnel resources.

**Project Delays**
- A comparison of actual project completion dates and planned project completion dates.

**Number of Releases**
- The number of releases rolled out into the live environment, grouped into Major and Minor categories.

**Duration of Major Deployments**
- The average time required to deploy a release from approval to completion.

**Number of Release Backouts**
- The number of releases that did not reach completion before they were canceled.

**Proportion of Automatic Release Distribution**
- A comparison of releases distributed automatically in relation to total releases.
Percentage of Failed Release Component Acceptance Tests
- A percentage evaluation of release components that failed acceptance tests in relation to total release components.

Number of Identified Errors
- The number of identified errors that were discovered during release testing.

Time for Error Fixing
- The time between error identification and resubmission of release with errors resolved.

Percentage of Failed Service Acceptance Tests
- A percentage evaluation of total service acceptance tests given in relation to total service acceptance tests that failed to obtain the required customer sign-off.

Verification Frequency
- The frequency of physical verification of CMS contents.

Number of Incidents Owing to Inaccurate CMS Information
- The number of incidents that were caused by inaccurate information in the Configuration Management System.

Effort for CMS Verification
- A record of the effort expended to verify CMS contents.

CMS Coverage
- The percentage of configuration components that are represented in the CMS.

Number of Unauthorized Changes Detected Automatically
- The number of unauthorized changes found by way of audits using automatic configuration update software.

Number of CMS Errors
- The number of errors found in the CMS during an audit.

WISDOM
- Reason, Solution

KNOWLEDGE
- Implication, Results

INFORMATION
- Location, Time, Name, Date
| Service Operation |

**Number of Repeated Incidents**
- The number of repeated Incidents with known resolution methods.

**Incidents Resolved Remotely**
- The number of Incidents resolved by the Service Desk without working at user’s location.

**Number of Escalations**
- The number of escalations resulting from incidents not being resolved in the proposed resolution time.

**Number of Incidents**
- The number of Incidents as recorded and categorized by the Service Desk.

**Average Initial Response Time**
- The average amount of time elapsed between when a user reports an Incident and when the Service Desk responds to the complaint.

**Incident Resolution Time**
- The time required to resolve an Incident.

**First Time Resolution Rate**
- The percentage of Incidents resolved at the Service Desk upon the first contact made by the customer.

**Resolution Within SLA**
- The percentage of Incidents resolved at the Service Desk satisfying all requirements set forth by the SLA.

**Incident Resolution Effort**
- A record of the average expenditure of personnel and financial resources to resolve Incidents.
Number of Problems
- The number of problems registered by Problem Management.

Problem Resolution Time
- The average time needed to obtain problem resolution.

Number of Unresolved Problems
- The number of problems without a known root cause.

Number of Incidents Per Known Problem
- The average number of Incidents linked to any given known problem.

Time Until Problem Identification
- The average time between identifying first Incident occurrence and identifying the root cause.

Problem Resolution Effort
- A record of the average work required to resolve problems.

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Continual Service Improvement

The ITIL Service Lifecycle
**Number of Service Reviews**
- The number of Service Reviews completed during the reporting period.

**Number of Identified Weaknesses**
- The number of weaknesses uncovered during the Service Review.

**Number of Process Benchmarkings**
- The number of Process Benchmarkings, Maturity Assessments, and Audits completed during the reporting period.

**Number of Process Evaluations**
- The number of formal Process Evaluations carried out.

**Number of Identified Weaknesses**
- The number of weaknesses identified during Process Evaluations.

**Number of CSI Initiatives**
- The number of CSI Initiatives developed in response to identified weaknesses found by way of Service Reviews and Process Evaluations.

**Number of Completed CSI Initiatives**
- The number of CSI Initiatives completed during a given reporting period.

---

1. Define what to measure
2. Define what areas can be measured
3. Collect the data
4. Process the data
5. Analyze the data
6. Present the data
7. Implement change
A Case for ITIL

14% Increase in Desktops
25% Consistent Savings Organization-Wide
30% Increase in Application Spend

1st Level Support
First-response assets deployed to resolve an interruption or mitigation of service

2nd Level Support
Assumes control over incidents which cannot be resolved by 1st level support

Access Profiles
Protect integrity and confidentiality of electronic information by determining what groups of data are accessible by various “user roles”

Access Rights
A set of data defining what service a user is allowed to access

Business Continuity Management (BCM)
The planning and development of contingencies in the event of dramatic or unforeseen circumstances

Business Continuity Targets
Minimal level of service needed to ensure that normal flow of business can continue in the event of a service interruption

Business Relationship Manager (BRM)
A role in ITIL responsible for nurturing a communication channel between IT and service customers. The BRM oversees the business management relationship process in the ITIL service strategy lifecycle phase

Capacity Report
Provides various ITIL processes and IT management personnel with information on service, and resource utilization and performance

Change
Refers to the addition, modification, or removal of anything that could have an effect on IT services

Change Advisory Board (CAB)
A group of people who help the change manager assess, prioritize, and schedule changes

Change Build Phase
Shorthand for the “change scheduling and build authorization” subprocess under ITIL’s change management process

Change Deployment Phase
Shorthand for the “change deployment authorization” subprocess under ITIL’s change management process

Change Evaluation Report
Documents ITIL’s change evaluation process

Change Management
The assessment of and decision about a proposed change to an IT service

Change Manager
A person who is responsible for overseeing the lifecycle of a change

Change Proposal
Assesses the risk, impact, and feasibility of a proposed major change, such as the adding or modifying of a service

Checklist Incident Prioritization Guideline
A set of standards used to determine the severity level and appropriate classification for an incident
Configuration Items
Available assets that may be combined into a configuration

Configuration Management System
A set of tools and data used for collecting, storing, managing, updating, analyzing, and presenting data about all configuration items and their relationships

Costs to Service
Expense incurred by servicing customers

CSI Initiatives
Developed in the continual service improvement lifecycle phase, CSI initiatives assemble the results of service reviews and process evaluations into specific initiatives aimed at improving services and processes

Customer Portfolio
A record containing information about all customers who use a particular IT service

Database
A collection of data stored and organized to support processes that require information

Emergency Change
A change that must be implemented as soon as possible

Event
A change in state that has an implication that affects a configuration item or service. Events often cause IT personnel to take action and may also result in incidents being logged

Event Record
A log that filters and categorizes events and describes how and where to take necessary action. Also known as an event management log

Exception Event
An unusual event that may require responsive action

Financial Analysis
Contains information on the cost of providing services relative to the profitability that’s to be derived from the services

Function
A known capability, such as a computer network, a service desk, or a support team, that can be relied upon to support a process

Incident
An unplanned interruption or substantial reduction in the quality of a service

Incident Prioritization Guideline
Describes the rules for prioritizing Incidents, including a description of what qualifies as a “major incident”

Incident Management
Activities undertaken to analyze and correct hazards and to prevent future reoccurrence of hazards

Incident Model
A prescription for a specific action plan that can be used to resolve common incidents

Incident Record
A set of data documenting the history of an incident from origin to closure

ITIL Foundation Level Certification
The broadest ITIL certification. The ITIL Foundation level certification is the most popular and is often a prerequisite for more advanced ITIL coursework

ITIL Service Lifecycle
A five-phase approach to implementing new or improving existing IT services for the purpose of business adaptation and growth

IT Service Management
A broad, inclusive term referring to the practice of establishing, operating, and monitoring IT services to meet business needs

Key Performance Indicators (KPIs)
Process-specific performance indicators used to gauge and assess performance levels of various processes in a given service lifecycle phase

Known Errors
Problems that have been documented and have known root causes and workarounds

Network
A group of two or more computer systems linked together

Operational Level Agreements (OLAs)
Documents and describes services to be provided from one part of an organization to another in support of the IT department’s delivery of services to customers

Patterns of Business Activity (PBA)
Documented business trends showing the changing unique demands placed upon a business given various circumstances such as time of day, location, pricing, etc.

Process
A structured set of activities designed to accomplish a specific objective

Problem
The cause of one or many incidents. The cause is not usually known at the time the problem record is created

Problem Management Report
A report that provides problem management data to other ITIL service management processes

Problem Record
Contains all details of a problem and documents history of the problem from discovery to closure

Process Architecture
An overview of all processes utilized for a support task, process architecture refers to making sure all processes are aligned and cooperative with one another

Project Management
The application of methods, skills, knowledge, and processes to arrive at a certain objective

Project Plan
A formal document that requires approval and denotes important resources, milestones, and activities for a project—also known as a “service transition plan”

Recovery Plan
Detailed instructions on how to return a system to a working state, including instructions for the recovery of data. May include steps to allow a temporary restoration of normal services, even before full functionality and full data recovery have been achieved
Release
Contains one release unit, or a structured set of release units, each of which contains a set of new, changed, or unchanged configuration items that are tested and introduced into a live environment to accomplish one or several approved changes

Release Management
Shorthand for ITIL’s “release and deployment” function

Release Package
Synonymous with “release”

Request
A formal request from a user that something be provided

Requests for Change (RFC)
A formal request for a proposed change, includes details that may be submitted on paper or electronically

Request Model
Defines steps to be followed to address various service requests

Request Record
A record containing all the details of a service request

Security Alert
A warning of an imminent or ongoing security threat

Service
A means of providing value to customers by facilitating outcomes customers want to achieve without incurring ownership of particular costs and risks

Service Design Package (SDP)
Documentation outlining all aspects of a proposed IT service. The SDP is utilized throughout all phases of the ITIL service lifecycle

Service Desk
Provides a Single Point of Contact (SPOC) to meet the communication needs of both users and IT employees

Service Levels
Quantity and quality of service as defined in SLAs, OLAs, and UCs

Service Level Agreement (SLA)
Documents and describes service level commitments from the IT service provider to the customer service

Service Level Requirement
A business goal attached to a project that is necessary for satisfying an established service objective

Service Review Report
The principal output from the service review process, containing several “suggested service improvements”

Standard Changes
Changes to an IT service that occur frequently and pose minimal disruption

Supplier Strategy
Used to catalog, compare, and make decisions on which supplier to use and when

Supporting Service
Also known as an “infrastructure service,” supporting services are IT services that are imperceptible to the larger business apparatus

Underpinning Contact (UC)
Documents and describes services to be provided from a third party to support the IT department’s delivery of services to customers

User Roles
Determines access rights

Warning
A record indicating the possibility of an Incident and the need for responsive action

Workarounds
Temporary solutions that mitigate the impact of “known errors”
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- **ITSM QuickStart Guide**: The Simplified Beginner’s Guide to IT Service Management