

Passing the ITIL® V3 Intermediate Exams

THE STUDY GUIDE



Passing the ITIL® Intermediate Exams: The Study Guide

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Passing the ITIL® Intermediate Exams

The Study Guide

Pierre Bernard



Colophon

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Exam Questions: OSA - Paper 1 Scenarios 2 & 6 / Questions 1, RCV - Paper 1 Scenario 1 / Question 1, PPO - Paper 1 Scenario 1 / Question 1, SOA - Paper 1 Scenario 1 / Question 1, SS - Paper 1 Scenario 1 / Questions 1, SD - Paper 1 Scenario 1 / Question 1, ST - Paper 1 Scenario 1 / Question 1, SO - Paper 1 Scenario 1 / Question 1, CSI - Paper 1 Scenario 1 / Question 1, Managing Across the Lifecycle - Scenario 1 Question 1

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Foreword

I was delighted to be asked to present this new title: Passing the ITIL® Intermediate Exams: The Study Guide. Improving the quality of delivering both Public and Private Sector IT services is one of my great passions, but this can only be achieved through one of my other great passions, developing the skills and capabilities of people working in IT service management. This publication can help you with this.

The core ITIL® publications greatly assist by providing a great resource of good practice ideas, but you can't learn how to do service management just by reading. To do this effectively you also need education and training. This should not be approached just by attending the first course that comes along, or by selecting the cheapest. You are making an investment for the future, and like every investment, you should make it wisely.

Investment in a correctly structured and professionally delivered education and training program is fundamental to embedding best practices within your organisation, through supporting the on-going development of the skills and capabilities in your service management team.

The ITIL® V3 qualification scheme provides the structure for such an appropriate education and training programme for IT service management. The scheme is professionally delivered worldwide by a range of qualified trainers and training organisations, under the governance of the Accreditor and the Examination Institutes. The different qualifications in the scheme provide students with a balanced progression from understanding the basic concepts at the Foundation Level to applying them at the Intermediate, Expert, and Master Levels.

This publication focuses on the Intermediate Level, which has two streams, the Lifecycle stream and the Capability stream. The ITIL Intermediate qualifications are a natural progression from the Foundation qualification for anyone working in IT service management. Candidates can select courses from either of the Intermediate streams, according to the needs of the individual and the organisation. This provides the flexibility to be able to match the specialist learning requirements of service management professionals to relevant courses.

I have been very fortunate to be involved in the development of the ITIL qualifications as a member of the ITIL V3 Examination Panel since 2007, which is how I first met the author of this publication, Pierre Bernard. Pierre and I share the same passion for

improving skills and capability, and have seen the qualifications move from development into widespread worldwide adoption.

I'm sure that at this point in the Foreword you want to know where this publication fits into the ITIL® V3 qualification scheme. The answer is very simple – in this publication Pierre has given insight into the Intermediate Qualifications that can best come from someone who has been actively involved in their development, and who is also very knowledgeable about the subject matter – IT service management.

Through reading this publication and using the sample examination questions you will gain excellent preparation both for your training courses and also for your examinations. You will learn about the syllabus and the types of examination questions, but just as importantly, you will get practical advice on how to approach your learning and how to approach the examinations. I recommend that you use this publication as pre-reading before you attend any ITIL Intermediate course, supplemented by reading complementary publications for the specific courses that you attend.

Note however that there is no 'magic bullet' method to guarantee success in these or in any other qualifications. Only you can guarantee that success, by taking the time and trouble to learn the subject, supported by sample examination questions, and facilitated by this publication and by your trainers. But your education must not stop after the exam – you should continue to develop yourself through application of what you have learned and by exploring other areas of IT service management.

I wish you well in your examinations and your career in IT service management. Both you as a service management professional and your organisation and its customers can reap great benefits from your investment in education and training. I recommend this title to you.

Kevin Holland

Service Management Consultant Specialist, Department of Health Informatics
Directorate (UK)

Chair of UK Government CTO Delivery Group Service Management Domain ITIL V3
Senior Examiner

Acknowledgements

This title was commissioned to serve the needs of many people wishing to use ITIL® training programs to extend their expertise and improve their corporate delivery.

Van Haren Publishing, the Publishers of this title, would like to extend our sincere gratitude to the Author, Pierre Bernard and also to the Reviewers.

Authoring a technical book of this nature and standard demands skill, time and patience and we are extremely fortunate that Pierre Bernard offered to write this work. Pierre's technical professionalism accompanied by an extremely courteous approach means it is a great privilege for us to work with him.

Our reviewers are also extremely professional and kind in reviewing the material we send them. Invariably positive, professional and dedicated, our reviewers put many long hours into finely crafting content and making sure it meets the very highest of standards demanded by the market place. We are extremely fortunate to have had the pleasure of our reviewer's company for many years and owe them a deep debt for the time, professionalism and advice they have given us.

For this title we would like to express our thanks to the following:

Claire Agutter: ITIL Training Zone

Kevin Holland ITIL V3 Examiner

Mart Rovers: President, InterProm USA

Finally I commend this title to you, if you have any comments please do send them in, we are always delighted to hear from our readers.

Ivo van Haren
CEO, Van Haren Publishing
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Preface

The intent of this book is to help people prepare for the ITIL® Intermediate qualification exams. This book contains tips for selecting the appropriate course, preparing for the course, and what to do during the course. Additionally, this book covers tips on reading and understanding the syllabuses, scenarios, supplemental information, the questions and the answers.

About the author of this book:

Pierre Bernard is a Certified Training and Development Professional (CTDP) with the Canadian Society for Training and development (CSTD).

Pierre started his career in IT in 1984. He has been involved with various certifications since 2000 with EXIN, ISEB and LCS before joining APMG in 2007. Pierre was a senior examiner (2007 – 2010) responsible for the creation of the ITIL qualification scheme, and the exam format, and participated in the creation process of many qualifications.

Pierre knows first hand how difficult it is to create exam questions and to make sure that they are understood by others. Being a non-native English speaker, French is his first language; Pierre knows how difficult it is to properly express his thoughts in another language.

Pierre is an ITIL Expert as well as having passed all intermediate qualifications. 'Pierre has taught thousands of people around the world. He knows how stressful examinations can be and hopes this book provides you with insight and tips to help you pass the ITIL qualification exams.

Additionally, Pierre has too much respect for the people who stood up and applied to become examiners to say anything negative about their work. Therefore you will find no negativity about any part of the examination scheme in this book, nor will you find any answers to actual exams.

Pierre makes no promises that you will pass your ITIL Intermediate exam by using this book, nor does he claim that you will fail if you don't.

What you will get is a better understanding of the whole qualification process as well as learning tips on how to properly and adequately prepare for the exams and how to answer the questions during the examination process.

ITIL®¹ Intellectual Property

Throughout this book, every attempt has been made to adhere to the ITIL Intellectual Property (IP) as defined by the owner of ITIL, namely the Office of Government Commerce as well as those defined by the official Accreditor, namely the APM Group Ltd.

Additionally, every attempt has been made to provide the appropriate and accurate references where material is quoted verbatim from another source.

Pierre Bernard
CTDP, ITIL Expert

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Introduction

The purpose of this book is to assist people to prepare for any of the ITIL Intermediate examinations. The audience includes students, instructors, course designers, and managers.

The book contains information assisting managers and their personnel in selecting the appropriate qualification required for their group and/or their career advancement. The book also contains information on adult learning principles which should provide assistance in understand the format of the scheme as well as the structure of each qualification, the syllabus, the exam papers and the course material developed by the training organizations. Instructors will find information that will help them delivering better exam guidance to the students. Course designers will find information that will help them design course properly aligned to the course syllabus.

The result should be a more enjoyable and practical learning experience for all involved.

Although there are no guarantees, the use of this book should provide the reader with a better understanding of the examination process as well as assisting with the preparation leading up to the examination.

Use of acronyms

Throughout this book, the following acronyms are used

Acronym	Definition
APMG	APM Group Ltd
ATO	Accredited Training Organization
CSI	Continual Service Improvement
EI	Examination Institute
MALC	Managing across the Lifecycle
OGC	Office of Government Commerce
OSA	Operation Support and Analysis
PPO	Planning, Protection and Optimization
RCV	Release, Control and Validation
SD	Service Design

Acronym	Definition
SO	Service Operation
SOA	Service Offerings and Agreements
SS	Service Strategy
ST	Service Transition

Table Introduction.1 List of acronyms used in this book

Referencing the official ITIL books

Due to the dynamic nature of the official ITIL literature and the various available formats, it is not possible to provide precise details such as the page, figure or table number. At the time of publication of this book, the ITIL books are available in three formats: print, electronic, and online subscription. From time to time, an excerpt from a book may be used as an example; however, in case of discrepancy the official book takes precedence and should always be used by the reader. Furthermore, this book is based on the 2007 edition of the ITIL core books although an updated edition was planned for release in the second part of 2011.

Referencing the official syllabuses

Additionally, due to the same dynamic nature of the official syllabuses (syllabi), this book does not contain all syllabuses. From time to time, an excerpt from a syllabus may be used as an example; however, in case of discrepancy the official syllabus takes precedence and should always be used by the reader.

Structure of the book

The book follows a logical progression of topics from understanding the qualification scheme, adult learning principles, and course and examination preparation to understanding and using the various syllabuses, scenarios and question booklets to achieve a thorough exam preparation.

Chapter 1 – The qualification scheme

Chapter 1 introduces the reader to the qualification scheme in simple terms. The chapter provides high level information about each level making up the qualification scheme. Information regarding the relationships between the levels as well as between the intermediate levels provides the reader with a better understanding of what to expect from each level as well as navigating and progressing through the qualification scheme.

Chapter 2 – Selecting the appropriate qualification

Chapter 2 provides the reader with insight about selecting the most appropriate set of qualifications for their personnel or themselves. Additionally, the reader will find relevant information on the following topics

- Clarification regarding various definitions – to clarify misconceptions
- Education and training issues
- Helping an IT professional select the appropriate stream or qualification
- The reasons for a preparatory course before taking an Intermediate level exam
- Competition for your education budget
- The difference between frameworks, methodologies and standards

Chapter 3 – Adult learning principles

Chapter 3 introduces the reader to the principles of adult learning, how adults learn, and how to motivate the adult learner. The chapter provides valuable insight into the Bloom's Taxonomy of Learning. The taxonomy was selected by the senior examiners very early in the creation of the qualification scheme. The Bloom Taxonomy comprises three domains of learning and six levels of learning.

The reader will gain knowledge into understanding teaching and learning and using the taxonomy of educational objectives. The chapter then provides details on each of the domains and levels of learning and their application throughout the qualification scheme.

Chapter 4 – The right qualification for the right people

Chapter 4 provides the reader with information about the five categories of qualifications within the scheme: foundation, complementary, intermediate, capstone and mastery. The reader will gain a deeper appreciation for the four levels: Foundation, Intermediate, Expert and Master. The chapter also provides a high-level description of the complementary set of qualifications that focus on specific topics.

The chapter provides information on the topics covered in each qualification, the learning outcomes to expect from each qualification, and guidance to the reader in mapping the various qualifications to their tasks, roles and responsibilities. Finally the chapter provides valuable information regarding the credit system and the correct meaning of contact hours.

Chapter 5 – Course and examination preparation tips

Chapter 5 starts with providing the reader with a word of caution regarding examinations in general. The chapter provides guidance to the prospective student on what to do

prior to attending a course. Using one syllabus as a backdrop, (Operational Support & Analysis) the chapter provides valuable information, insight, and tips on approaching a syllabus.

The reader is encouraged to conduct this exercise on their own for any course syllabus to gain more experience as well as better understanding of that course. The chapter then provides insight on properly understanding the syllabus, what should be done during the course, and tips on properly reading and understanding the material.

Chapter 6 – Understanding the exam paper

Chapter 6 provides the reader with valuable examination information and tips before they start the examination. The chapter covers the characteristics of scenarios, how to properly read and understand a scenario by identifying the relevant information. The reader is then taken through the analysis of two scenarios to reinforce the learning experience.

Chapter 7 – Understanding the question

Chapter 7 provides the reader with invaluable information and tips regarding the proper analysis of a scenario, determining what the question is really asking and what information to look for in the answers in order to better select the 'best' one. The reader is then taken through the analysis of one question from each of the ten qualifications (Question one from Sample paper one) to reinforce the learning experience. The examples cover the four capabilities, the five lifecycle, and the capstone qualifications.

Chapter 8 – Exploring the syllabuses

Chapter 8 first takes the reader on an exploration tour of the structure of the syllabuses for the capabilities stream which covers, the four basic sections: (1) introduction, (2) processes, (3) technology and implementation considerations and (4) challenges, critical success factors and risks. In addition, the chapter provides detailed explanation about each of the four capabilities qualifications.

The reader is then taken on a similar exploration of the structure of the syllabuses for lifecycle stream qualifications which covers eight sections: (1) introduction, (2) principles, (3) processes, (4) activities, (5) organizing, (6) technology considerations, (7) implementation considerations and (8) challenges, critical success factors and risks. Finally the chapter provides detailed explanation about each of the five lifecycle and the capstone qualifications.

Chapter 9 – Using scenarios for practice

Chapter 9 explores how one scenario can be used for all questions within the same sample paper. The reason is quite simple; there are only so many available sample papers (practice exams) available through the examining institutes.

With a little practice and the guidance provided in this chapter, the reader should be able to create multiple additional questions. However, it is not implied here that every scenario will work easily with every question. Nonetheless, this is a good exercise to try.

Chapter 10 – Using exam questions for practice

Chapter 10 uses the same approach as provided in Chapter 9 but from a question perspective. The chapter explores how one question can be used for all scenarios within the same sample paper. Again, as with Chapter 9, the reason is quite simple; there are only so many available sample papers (practice exams) available through the examining institutes.

With a little practice and the guidance provided in this chapter, the reader should be able to create multiple additional questions. However, it is not implied here that every question will work easily with every scenario. Nonetheless, this is a good exercise to try.

Chapter 11 – Using answers & rationales for practice

Chapter 11, although smaller than its two predecessors, provides the reader with a third option to properly prepare for the examination, the answers and rationales.

The qualification scheme

ITIL² (The Information Technology Infrastructure Library) advocates that IT services must be aligned to the needs of the business and underpin the core business processes. It provides guidance to organizations on how to use IT as a tool to facilitate business change, transformation and growth.

The ITIL best practices are currently detailed within five core publications which provide a systematic and professional approach to the management of IT services, enabling organizations to deliver appropriate services and continually ensure they are meeting business goals and delivering benefits.

This chapter is not trying to 'sell' you ITIL. This chapter is about helping you make sense of the qualification scheme. It introduces the various groupings making up the qualification scheme. The information in this chapter should help you in the selection process in deciding which ITIL qualification is best suited for you or your personnel.

There are five categories of qualifications within the scheme. There are four levels: the Foundation, the Intermediate, the Expert and the Master. There is also, albeit growing slowly, a complementary set of qualifications centered on specific topics.

The Foundation level

Official name of the certification

- ITIL V3 Foundation Certificate in IT Service Management

What it is

- Any foundation level qualification focuses on providing basic and rudimentary knowledge. It is about acquiring a good level of comprehension of the key concepts, structure, and terminology.

What it is not

- Gaining a detailed understanding of service and/or process adoption and adaptation practices

2 <http://www.itil-officialsite.com/AboutITIL/WhatIsITIL.asp>

- Gaining a detailed knowledge of how to modify individual and/or organization behavior (culture) when adopting and adapting good practices
- Gaining a detailed knowledge of all the subtleties of the ITIL framework

You should get the point by now...

The ITIL Foundation level qualification

This is an entry level qualification offering candidates a very basic and general awareness of some of the key elements of the Service Lifecycle. The topics covered include high-level linkages (relationships) between the five core lifecycle stages, and between their respective processes. The topics also include the contribution of the five core phases and their processes to the practices involved in Service Management.

A candidate who has completed the education and examination components related to this certification successfully can expect to have gained a general basic knowledge and understanding in the following areas. Please note that the five core books cover more areas and topics not listed here.

- Service Management
- The Service Lifecycle
- Some key principles and models
- Some generic concepts
- Some selected processes
- Some selected roles
- Some selected functions
- Some technology and architectures
- The ITIL qualifications scheme

A candidate's successful completion of the Foundation Level qualification fulfils the pre-requisite entry criteria for the next level of study within the ITIL qualifications scheme, the Intermediate level.

Target group

The ITIL Foundation Certificate in IT Service Management is primarily aimed toward the following:

- Individuals who require a basic understanding of the framework
- Individuals who require an understanding of how the framework can be used to enhance the quality of IT service management within an organization

- IT professionals or any other individual working within an organization that has adopted and adapted the framework
- Those individuals who need to be informed about an ongoing service improvement program
- Those individuals who (may) contribute to an ongoing service improvement program
- Any individuals who may have an interest in the subject

A (strong) word of caution

An individual holding the Foundation level certificate will not be able to apply the Service Management practices without further guidance. The syllabus for this course does not cover all phases, does not cover all processes and certainly does not provide any implementation guidance. The Accredited Training Organizations (ATOs) are free to build their course material to include more than the syllabus requires as well as providing additional guidance. The instructors are certainly free to provide practical examples taken from their experience or that of their colleagues.

Providing information going above and beyond the syllabus might be a great differentiator between ATOs; however, doing so may be detrimental to the success rate of the individual during the exam.

Furthermore, it is not mandatory for an individual to attend a course in order to take the Foundation level qualification exam.

Exam format

The Foundation level exam tests a candidate's ability to demonstrate an understanding of the basic concepts, describe them and demonstrate basic comprehension of the ITIL practices.

In short, the Foundation examination is about 'what is ITIL'. Think of this type of examination as asking you to provide the correct meaning of the road signs in your country.

The Foundation examination consists of the following:

- 40 multiple choice questions
- Only one option can be correct and will be awarded a mark
- No marks are deducted for an incorrect answer
- The duration is 60 minutes
- The pass mark is 65% (26/40)

Another word of caution

The Foundation level exam is not about how candidates currently perform their duties within their organization.

The Foundation level exam is not about how a candidate's organization currently performs practices.

Exam languages

The Foundation level exam has been translated into many languages in order to meet the certification requirements of the global community. See the Accreditor's website Examination Languages area³ for a full list of languages currently available or undergoing translation. This information or a link to the Accreditor's website should be available on the Examination Institutes' (EIs) and/or ATOs' websites.

The Intermediate level

The Intermediate level makes up the 'core' of the qualifications scheme as it provides in-depth details and focuses on the 'how-to' aspects of the framework.

There are two specific streams at the Intermediate level. There is the Service Lifecycle stream which focuses primarily on the 'management of services and processes' aspect while the Service Capability stream focuses primarily on 'executing the day-to-day process activities related to delivering' aspect. Each stream has its own set of qualifications.

The modular approach of both streams allows you, as a candidate, to select the specific qualification that is of interest to you, based on your own individual educational or career-driven requirements

Depending on your role, whether managerial or not, you can select for yourself or your employees, as few or as many ITIL Intermediate modules as required over time and at the pace desired. This will help you to build a portfolio of certifications tailored to your or your team's requirements.

Each of the Intermediate certifications provides candidates with the knowledge, skills and competencies required to apply or manage the application of specific areas of ITIL best practice, in a Service Management environment.

3 <http://www.itil-officialsite.com/InternationalActivities/ExaminationLanguages.asp>

An additional qualification, 'Managing across the Lifecycle', which is also referred to as the 'capstone' qualification, allows individuals who meet the mandatory requirements to achieve the ITIL Expert qualification.

The Lifecycle stream

This stream consists of five individual qualifications, each based on one of the Service Lifecycle phases – that is, each qualification is based on only one of the five core books. This stream will be of interest to candidates such as (but not limited to) managers, consultants and trainers whose primary focus is on the Lifecycle itself – that is, the Service Lifecycle, the use of processes and the practice elements as well as developing the management capabilities needed to deliver quality Service Management.

The Capability stream

This stream consists of four individual qualifications, each based on a set of clustered process activities, their execution and use throughout specific phases of the Service Lifecycle phases – that is, each qualification is based on two or more of the five core books. This stream will be of interest to people (but not limited to) whose primary focus is on deep level understanding of roles, processes, their implementation and their interactions.

Managing Across the Lifecycle

The ITIL Managing across the Lifecycle qualification completes the Intermediate stream, by focusing on the ancillary knowledge required to implement and manage the necessary skills associated with use of the Lifecycle practices. This particular module is aimed at those candidates interested in achieving ITIL V3 Expert Level, for which this module is a key requirement.

Selecting intermediate modules

Because of the scheme's flexibility candidates can choose modules based entirely on their own individual certification requirements, which can be focused on their current / prospective job roles, or on their own personal educational objectives.

Candidates can take as few, or as many, intermediate qualifications as they require. Each of the Intermediate qualifications is recognized by the industry in their own right, and will be extremely useful to candidates based in, or working towards, a role in IT or Service Management.

Specialization

The modular structure of the Intermediate level allows candidates to select and focus their studies and certifications on specific areas of the Service Lifecycle. An individual can develop a specialty or an organization can develop a center of expertise within a defined area or discipline by selecting various qualifications.

Concentrating on the Lifecycle stream will enable individuals and organizations to focus on the management aspects of Service Management, gaining valuable knowledge and skills to manage, control and coordinate all activities under a specific phase of the Service Lifecycle.

Concentrating on the Capabilities stream will enable individuals and organizations to focus on detailed execution of Service Management, gaining valuable knowledge and skills to plan, design, transition, operate and improve specific aspects of services and processes.

Concentrating entirely on a specific phase of the Service Lifecycle will enable individuals and organizations to gain a holistic perspective of an entire phase from both the high-level management and the detailed execution perspectives. This is achieved by selecting overlapping qualifications from both streams.

The Expert level

The Expert level targets those individuals who are seriously interested in demonstrating a superior level of knowledge in the field of Service Management.

A candidate successful in achieving this qualification benefits at two levels of development, personal and professional. This qualification should aid a candidate's career progression and advancement within the field of Service Management.

Candidates who achieve the Expert level satisfy the pre-requisite entry criteria for the Master Level; which is now the highest level of qualification within the scheme.

Achieving Expert level

As mentioned previously, the qualification scheme is based on a modular approach to certification. Candidates are free to select from a variety of targeted areas of the Service Lifecycle offerings, each focusing one or more major aspects as well as to varying degrees of depth and specialization.

The flexibility offered by the modular approach provides candidates with the freedom to tailor their own individual qualification portfolio to meet their personal and professional needs and requirements.

Although there are many possible module combinations to achieve the Expert level there are four mandatory minimum requirements that all candidates must meet. These are:

1. The candidate must hold the Foundation certificate
 - ITIL V3 Foundation
 - or –
 - Foundation in ITIL Service Management and the V2- V3 Foundation Bridge qualification
2. A minimum total of 22 credits comprised of V3 Intermediate Level qualification and/or earlier qualifications
3. After earning a minimum total of 17 credits, the Managing across the Lifecycle module must be taken and passed
4. It is strongly recommended that the candidate should achieve a balanced knowledge base across the full Service Lifecycle.

These requirements will ensure that all candidates who achieve the Expert Level have successfully completed a series of certifications which span all disciplines consistently.

Applying for the Expert level certificate

Once a candidate has completed all four of the above mandatory requirements successfully, the individual will be eligible to apply for the Expert certificate.

There are several Examination Institutes (EIs). Each EI will have their respective individual processes for application and issuing of the Expert Level certificate. A candidate is free to achieve any of the qualifications through different ATOs as well as through any EI, as not every ATO offers all qualification courses. However, for the sake of simplicity, the EI who administers the highest level of certification (Managing across the Lifecycle or the V3 Managers Bridge) achieved by the candidate will issue the Expert level certificate.

There are no differences between the Expert level certificates issued by any of the EIs as each EI has been official recognized by the official Accreditor. Furthermore, the industry

does not make any differentiation between the Expert Level certificates from any of the EIs.

Potential routes to Expert level

As mentioned previously (see mandatory requirement number four above) there are many possible and valid routes available to achieve the Expert level. As time goes by, the qualification scheme evolves. For the latest valid certification combination, please consult the ITIL Credit profiler available on the websites of the Accreditor, the EIs and many ATOs.

A word of caution regarding the Expert level

Not all ITIL experts will be created equal. There are six basic high-level possible paths such as

1. Lifecycle qualifications only
2. Capabilities qualifications only
3. Combination of lifecycle and capabilities qualifications
4. Combination of lifecycle and complementary qualifications
5. Combination of capabilities and complementary qualifications
6. A combination of lifecycle, capabilities and complementary qualifications

Moreover, as there are many qualifications in each stream, the number of accepted combinations is quite large. For a better understanding of the combinations offered, the reader you refer to the credit profiler available on the official ITIL website. See footnote.

The Master level⁴

As IT Service Management grows in maturity, so too do the requirements for developing and recognizing capable individuals in the industry.

The need for increasing levels of IT Service Management (ITSM) knowledge and skills can be seen in the increasing number of jobs that require these skills, the emergence of ITSM academic programs, and formal professional and career frameworks for ITSM practitioners.

The Master qualification meets these growing needs by focusing on the experienced levels of the industry, testing the capabilities of senior IT service managers, executives and practitioners.

4 Taken from the official Accreditor's website (<http://www.itil-officialsite.com/itilservices/v1/map.asp>)

Focus on practice

In an industry that values the ability to work in the real world, advanced qualifications need to test more than application to hypothetical cases.

Candidates for the Master qualification must select one or more real world situations and explain how they were able to apply their knowledge of to implement real solutions. Testing is performed by assessing a written submission describing real-world assignments, augmented by oral examination.

Target group

The Master qualification is aimed at people that are experienced in the industry – typically, but not exclusively, senior practitioners, senior consultants, senior managers or executives, with five or more years' relevant experience. All candidates must hold the Expert qualification.

Curriculum

Since every candidate will have a unique range of experience, principles, methods and techniques that they choose to apply, it is not possible to define a fixed syllabus; instead, the Master qualification allows candidates to determine their own field of study.

A Requirements and Scope document will guide candidates through the process of defining their field of study and which elements they can include.

Achieving the Master qualification

The steps for achieving the qualification are:

- Candidates submit a proposal describing the real life situation they intend to address and the elements they will apply to this situation
- Candidates prepare and submit a Work Package for assessment
- Candidates attend an interview to support the Work Package assessment.

Learning objectives

Although there is no fixed syllabus for this qualification, each candidate is expected to have an in-depth knowledge of the areas of study that they have selected for inclusion in their proposal and Work Package. Candidates are also expected to demonstrate management and planning skills in support of the areas of study that they select.

Why obtain the Master qualification?

- Senior ITSM practitioners and managers are better able to differentiate themselves in an industry that requires ever-increasing demonstration of competence

- Experienced practitioners and managers can identify key areas of study and improvement as they prepare for the qualification
- Organizations will gain value from the benefits achieved during the assignment, and can benefit from the coaching received during preparation of the Work Package
- Organizations that have Masters working for them can claim a level of demonstrable quality, since projects in that organization were independently evaluated
- The Master qualification can be used to differentiate candidates for senior roles

The Complementary level

Managing services involves more than adopting and adapting good practices from only one framework. Additionally, there are instances where an individual or an organization requires a more focused look at a specific component. The qualifications scheme recognizes this fact and this is why it includes supplementary value-adding certifications which link ITIL-base practices to the current certification portfolio. These certifications make up the ITIL Complementary qualifications scheme.

Under this arrangement, any of the officially accredited Examination Institutes may submit a qualification for inclusion. The proposed qualification is then assessed against the following set of criteria:

- It covers one or more topics within the Core and/or Complementary publications – or –
- It covers other publicly available Service Management related or relevant publications such as books, standards, papers, etc
- It must not overlap significantly with other ITIL Core qualifications
- It must not simply re-hash topics from a new focus or approach

If the proposed qualification is officially endorsed it will be awarded a credit value, thus recognizing its alignment to the qualification scheme.

Candidates who successfully achieve recognized complementary certifications can use the credits gained (up to a maximum of 6 credits) from complementary certifications towards the ITIL V3 Expert Level of certification.

List of complementary qualifications

The following certifications are endorsed as Complementary and enable a candidate to earn the following number of credits provided they successfully pass the relevant examination.

Qualification	Qualification Overview	Credit Value
ICT Infrastructure Management (ICTIM)	This BCS-ISEB certificate is based on the ITIL best practice guide ICT Infrastructure Management. Successful achievement of the certificate will enable candidates to demonstrate knowledge and application of the processes required to manage an ICT infrastructure, and define the interfaces and dependencies with all other areas involved in the specification, design, development, support, delivery and continuous improvement of ICT services.	3.5 credits
Service Catalogue	This APMG-International certification and associated course is aimed at those with an ITIL Foundation certificate (or above) who have an interest in learning more about how a Service Catalogue could benefit their business, and specifically looks at ways to control demand, publish and track service pricing and cost and automate service request management and fulfillment.	1.5 credits
Foundation Certificate in ITSM according to ISO/IEC20000	The EXIN and TUV-Sued Foundation Certificate in ITSM according to ISO/IEC 20000 demonstrates a student's understanding of the core principles, processes and practices of a quality approach to IT Service Management based on the international standard for IT service provision. The 'IT Service Management according to ISO/IEC 20000' program focuses on the role of people and their activities in achieving quality of IT services and processes.	1.0 credits
Certified Process Design Engineer (CPDE)	This LCS certification will impart, test and validate knowledge on best practices in the assessment, design, implementation, integration and management of IT Service Management processes. The knowledge obtained applies to every Service Management framework, standard and maturity model.	1.5 credits
BCS Specialist Qualifications SDI CMS SLMS SBRM SPM SCSM	The following Specialist Certificates are available: The BCS-ISEB Specialist Qualifications in IT Service Management focus on a single IT Service Management job role and provide detailed knowledge and information on how each particular job role operates within an organization. They embrace a broad range of industry good practice including ITIL, COBIT®, ISO/IEC 20000, SFIA/SFIPlus <ul style="list-style-type: none"> • Specialist Certificate in Service Desk and Incident Management • Specialist Certificate in Change Management • Specialist Certificate in Service Level Management • Specialist Certificate in Business Relationship Management • Specialist Certificate in Problem Management • Specialist Certificate in Supplier Management 	1.5 credits

Qualification	Qualification Overview	Credit Value
Configuration Management Database (CMDB)	This APMG-International certification is aimed at those interested in learning more about how a CMDB could benefit their business, and specifically looks at ways to identify, control report, audit and verify service assets and CIs. It provides a logical model of IT services, linking services to business processes and supporting identification of service improvement opportunities.	1.5 credits
Change Analyst	This APMG-International qualification helps candidates understand the practical implication of change within an IT service environment. Change Analyst gives candidates the knowledge and confidence to assess, authorize and manage changes. They will gain an understanding of how to develop business cases for changes and will have an insight into how to get approval for proposed changes. This is a practical, role based certification for those who already have ITIL Foundation.	1.5 credits

Table 1.1 List of complementary qualifications

Selecting the appropriate qualification

Selecting the appropriate qualification is more complex than one might think. It is important to consider many aspects such as personal interest, and preferences, as well as the needs of the individual, the group, or that of the organization. Additionally the characteristics of the qualification, found in the syllabus, will be determinant factors in the selection process.

In this chapter the reader will find insight about selecting the most appropriate set of qualifications for their personnel or themselves. Additionally, the reader will find relevant information on the following topics

- Clarification regarding various definitions – to clarify misconceptions
- Education and training issues
- Helping an IT professional select the appropriate stream or qualification
- The reasons for a preparatory course before taking an Intermediate level exam
- Competition for your education budget
- The difference between frameworks, methodologies and standards

For many people, the terms certification, designation, diploma and qualification are synonymous. They are not. To ensure proper comprehension about the above terms, here are their respective definitions in alphabetical order. Please note that only the relevant meaning of the definition in the context of the ITIL qualification scheme is provided. All definitions are taken from the Merriam-Webster online dictionary⁵.

cer •ti •fi •ca •tion	noun	\,sər-tə-fə-`kā-shən \
Definition of Certification		
The act of certifying: the state of being certified		

Figure 2.1 Certification

⁵ <http://www.merriam-webster.com/dictionary/>

cer •ti •fy	noun	\,sər-tə-fi\
Definition of Certify		
1: to attest authoritatively: as a: confirm b: to present in formal communication c: to attest as being true or as represented or as meeting standard 4: to recognize as having met special qualifications such as of a governmental agency or professional board within a field e.g.: agencies that certify teachers Synonyms: attest, witness, and vouch		

Figure 2.2 Certify

cer •ti •fi •ca •te	noun	\(,)sər-tə-fə-ˈkæt\
Definition of Certificate		
1: a document containing a certified statement especially as to the truth of something; specifically: a document certifying that one has fulfilled the requirements of and may practice in a field		

Figure 2.3 Certificate

de •sig •na •tion	noun	\,de-zig-ˈnā-shən\
Definition of Designation		
2: appointment to or selection for an office, post, or service 3: a distinguishing name, sign, or title		

Figure 2.4 Designation

di•plo•ma	noun	\də-ˈplō-mə\
Definition of Diploma		
2: a writing usually under seal conferring some honor or privilege		
3: a document bearing record of graduation from or of a degree conferred by an educational institution		

Figure 2.5 Diploma

qua•li•fi•ca•tion	noun	\,kwā-lə-fə-ˈkā-shən\
Definition of Qualification		
3a: a quality or skill that fits a person (as for an office) e.g.: the applicant with the best qualifications		

Figure 2.6 Qualification

The ITIL qualification scheme

Using the above definitions, the meaning of the ITIL qualification scheme becomes clearer. Here is how to interpret the meaning.

The ITIL qualification (*a quality or skill that fits a person*) scheme awards certificates which are *documents containing a certified statement especially as to the truth of something; specifically: a document certifying that one has fulfilled the requirements of and may practice in a field to the people*.

The EIs award certificates to individuals who, after attending an accredited course provided by an Accredited Training Provider (ATO), achieve a pass mark (or higher) for an examination based on an established course syllabus. The only exception for the mandatory attendance to an accredited course applies to the Foundation certification.

The EIs award the ITIL Expert certificate to an individual who successfully completes the requirements for this certification⁶.

⁶ See the Official ITIL Website for details.

The EIs will award the ITIL Master certificate to an individual who successfully completes the requirements for this certification. Please note this certification is still under development. See the Official ITIL Website⁷ for details.

Upon receiving any of the currently available ITIL V3 certificates, individuals do not achieve a designation. They cannot use the course acronym as if it were a designation. The successful candidate can list their achieved certifications in a curriculum vitae (CV) or résumé. It is accepted to add 'ITIL® Expert' on one's email signature or business card or any of the qualification names provided that the '®' (registered trademark) symbol is included after the word 'ITIL'.

The ITIL V2 – V3 bridging certifications and the certification schemes based on the previous versions of ITIL do not provide any designation either.

Please note that the certificates are not diplomas. However, many universities around the world now include ITIL courses as part of their curriculum. So who knows?

Education and training issues

Training organizations, regardless of what topic they cover, seem to face the same issue: too many students come to class unprepared despite the numerous times the training organization instructs them to do so.

The strongly suggested recommendation message about reading the course material before attending the course is reiterated by all three groups involved; the Accreditor, the EIs and the ATOs. This message is actually included in all intermediate level syllabuses.

In the case of ATOs and to comply with accreditation requirements set by their respective EIs, they include this message in numerous locations and documents such as their website, the course description, the confirmation email, the preparation package, the reminder email, or even via a phone call.

Scenario

Imagine for a moment that you are an instructor. If you already are an instructor, you have already lived the following situation.

⁷ <http://www.itil-officialsite.com/home/home.asp>

- *You welcome the delegates*
- *You discuss the logistics of the course*
- *You facilitate the introduction of each candidate*
- *You start talking about the pre-reading...*

And they all look surprised and tell you they did not know anything about it.

Surprise... Surprise...

One of the biggest issues here is one of culture. Of course, not all cultures are the same and of course, nor is everyone the same. Additionally, the following is not a generalization either but comes from observations from the author.

Fast, fast, fast

It seems we live in a world where everything has to be fast, everything has to be now, and people are working longer hours, and they have more responsibilities than ever. In this world of constant connectivity, social media, and the (very) false perception we can multitask, attending a course undisrupted in nearly impossible because we allow it to be so.

When it comes to continuing education, some believe simply attending a course should entitle them to be awarded a qualification. Additionally it may appear that some people don't want to put in the effort. This is not suggesting that people are lazy; they just don't have the time. People commute long hours stuck in their cars or in public transportation and they work long hours.

However, too often people work on meaningless tasks, so called 'make-work' projects, surf the internet for personal reasons on company time using company equipment, or socialize too much. Lost productivity is everywhere.

Busy, busy, busy

There is also the fact there are too many meetings. The problem with meetings is that there is no action items assigned with a deadline. There is too much talk and too little actual work done. How can one expect people to do any work when they attend meeting after meeting?

Another roadblock is that many people think they have to be connected all the time; they check their cell phones all the time. You speak with someone, his or her phone rings and

they answer the phone. This is rude. People do this in meetings, in private conversations and of course in education and training situations.

As instructors, we always hear that people can attend a course but they still have to be available and they have to do their job on top of that. This is non-sense.

Business etiquette is not what it used to be. We fell into the vicious circle of deploying something we know little (or nothing about), overworked staff, too few staff, and the mentality of 'I wanted it yesterday.'

Implementing best practices

Additionally, many organizations still seem to think that implementing any best practice is like installing a video game on a PC from a CD. Common sense tells us this is not the case. Furthermore, the expressions 'implementing ITIL' and 'implementing best practices' are both misleading and incorrect. Here are five simple reasons why.

1. ITIL is a set of books describing services, processes and practices.
2. ITIL is not prescriptive.
3. Organizations are already doing most, if not all, of the activities described in the ITIL core books. The activities may not be executed in a consistent, repeatable and measurable manner across the various functions.
4. There may be a start date when an organization realizes its practices are not as effective and as efficient as they could be but there is no end date when adopting good practices.
5. Adopting good practices (not best) is about accepting to modify our personal and organizational behaviors. Actually, even the expression 'good practice' is misleading. It would be more adequate to utilize 'proven practice' instead.

Short-term views

Many organizations believe in continuous education for their personnel. They are not afraid to invest time, money and material (books anyone?). They understand that certification is but one step in the grand scheme of things. On the flip side, some organizations refuse to provide education, training, and certification for their personnel.

Pop quiz:

Which is better and more economical?

- A. Educating and training your personnel
- B. Hiring a consultant to come and do the work, then leave without sharing anything

Answer 'A'

This answer is better and more economical in the long run as the knowledge will remain within the organization much longer and has a greater probability of being both shared and applied.

To compound the issues, organizations are always looking at ways to cut costs or at least control them. In periods of fiscal restraint, one of the first budget items to be reduced, often drastically, is education and training. It is during difficult times that organizations should focus on education and training so that when recovery is at hand, the personnel are ready for the new challenges.

In tough economic times, slashing the education and training budget is easy and immediately affects the bottom line. This is a huge mistake. Sure, some pundits are going to say this book is obviously biased towards selling education and training. Of course it is. However, it is always a good thing to advocate education and training regardless of the type of industry.

Another narrow view is the belief of some managers and executives that education and training will only serve to make their personnel more marketable to other organizations and encourage people to leave. The view goes something like this.

Narrow-minded manager [1]

'Why should I empty my small budget to educate and train the personnel only to see them leave shortly after? Why would I want to subsidize my competition or any other organization? As soon as my employees get a new certification, they update their résumé (CV) and they leave. I pay and someone else reaps the benefits; no way, not on my watch.'

Narrow-minded manager [2]

'How difficult can this ITIL stuff be? I can only afford so much training. These are intelligent people. They should be able to figure out how to do this when they come back from basic training. Besides, I can only manage to do without them for three days.'

Narrow-minded manager [3]

Speaking to an employee about to leave for a course

'Look, I know this course is important for you and that's it is already paid and that we have already postponed it twice. However, I can ill afford to have you unavailable for the duration of this course. I want you to call in for the meetings you normally attend and to check your email all day.'

Therefore, it is no wonder that people come to class unprepared.

It is like everything in life; without putting in enough effort (what is referred to as sweat equity) there are no results.

Note from the author

The education system is suffering just as well. Kids download essays from the internet, don't study and parents are against homework.

I am a parent and I had to fight many parents who complained that 30 minutes of homework a night stressed out their kids.

How does this reflect on the IT education industry? It is what I call the 'I want you (the instructor) to teach me everything you know about a topic, both theory and practical aspects, in as little time as possible. I want not only to know it but understand it and be able to apply it in my work immediately.'

Now, that is absurdly unrealistic.

So how do we address this? We start at the top. We do a massive communication campaign in as many outlets as possible such as blogs, magazines, conferences, presentations to executives, etc.

Organizations have to invest in developing the knowledge and skill sets of their people. In turn, people must understand the difference between education and training.

Pop quiz:

What is the difference between education and training?

Answer:

- Education is the acquisition of new knowledge
- Training is the practical application of the newly acquired knowledge
- Training is the continual practical application of the acquired knowledge

Example:

Education is the acquisition of knowledge and facts while training is the practical application of that knowledge. Being in the classroom to learn the signs and rules of the road is education. Being in a vehicle under the supervision of an instructor or in a simulator and actually driving/operating the vehicle is training.

By the way

Have you ever noticed that athletes, performers (actors, singers, or dancers) are always practicing their craft? Why is this not the norm in the business world? We are, after all, performing for our customers and for our organization. What about the old adage that says ‘practice makes perfect’? Shouldn’t the business world slow down for a second, come up to the surface, breathe a little, look around and actually deliver on it’s mantra of ‘our people are our greatest assets’.

Well, if people are the greatest assets to an organization, when will the business world actually treat them as something valuable? The easy ways to do this is by educating and training them on a continual basis and allow them to practice their work.

This would result in fewer errors, less faulty products, improved morale, improved productivity and improved profit margin.

This would also result in less stress for employees, fewer sick days, better personnel retention and last but certainly not least, improved work-life balanced.

What a concept!

– Heavy sarcasm from the author

Clear and simple message to every organization

How can someone become an expert in any field just by attending one week-long course? They can’t. Give them the resources, money to pay for the course, the books, and the time to prepare and attend the course. By the way, when they attend the course, they are not available.

1. Create and foster a culture based on the acquisition and sharing of knowledge, education and training
2. Provide the means (time, money, and material) to the personnel to achieve <1> above
3. Encourage the dissemination of the knowledge acquired via <1> and <2> above – Knowledge SHARING is power.
4. Enable the employees to acquire the required material such as books, white papers, articles, knowledge bases, etc.

Action items for organizations

- Invest in your people through education and training.
- Stop cutting the education budget, increase it instead.
- Conduct a training needs analysis

- Assess levels of knowledge and skills
- Create an education and training plan
- Execute the education and training plan
- Start again

This will contribute to greater employee retention as well as improving productivity, efficiencies and effectiveness. This should result in a greater job satisfaction level.

This may seem a simplistic view, unrealistic, and out of touch with reality. It is not. If things continue the way they are today, best practice consulting will be around for a long time and companies will pay exorbitant amounts of money and time trying to sort this all out.

Remember the following two old adages

'An apple a day, keeps the doctor away'

'A gram of prevention is worth a kilogram of cure'

Certification for the sake of certification

Don't be seduced by certification for the sake of certification. A wise person should have the knowledge, abilities, attitudes, and aptitudes to take the literature on a specific topic and be able to apply it based on the needs and requirements of the situation.

Organizations should especially be careful about people with too many certifications.

Note from the author

Someone once showed me a 3 inch (about 7.5 cm) binder full of certificates he had achieved in his career. Did this demonstrate that he had the knowledge, the experience, the skills and the aptitudes? In my humble opinion and my dealings with him, it did not. Look, I personally have certificates on technology and software we can probably only find in a box in a basement or in a museum somewhere.

Are these certifications relevant for current needs?

Too many people think holding any foundation level certificate makes them an expert at implementing it. If this was true then someone who took two introductory level accounting courses as electives while attending university should be an accountant. Anyone with a little common sense should agree that two or three measly introduction level courses in accounting do not an accountant make.

Holding any certification means that someone can learn and acquire knowledge. To many, nothing beats experience. Some people are very good at taking and at passing exams. However, can they actually apply the knowledge? On the other side, there are people who do poorly with exams but are very good at what they do.

There are two perspectives to look at here. The first is that people attend certification courses to acquire the knowledge. They will start applying that knowledge once they are back at the office. The second perspective is when very experienced people attend a certification course to 'prove' what they know about something they have already been doing for most of their career. This second reason is often tied to career advancement opportunities.

Pop quiz:

Which of the following is better or best?

1. *Someone learning something, achieving certification then applying it in his or her work*
2. *Someone with a lot of experience achieving a certification on something they already have a lot of experience with*
 - a) *1 only*
 - b) *2 only*
 - c) *Both*
 - d) *Neither*
 - e) *It depends*
 - f) *I don't know*
 - g) *Who cares*

The answer is that neither situation is better than the other is and there is no 'best' answer here. Both situations are valid and useful. By the way, answers e), f), and g) should be taken with a grain of salt and actually removed from anyone's vocabulary.

Which stream or qualification should an IT professional aim for?

First, not everyone in an organization needs to achieve the ITIL Expert level, let alone the ITIL Master. Of course, training and/or consulting organization in the field of Service Management are likely to have many ITIL Experts and eventually ITIL Masters.

Not everyone goes to college or university. For all the people who do go to college or university not everyone registers for and completes the Doctorate (PhD) level. The same logic applies to the ITIL Expert and Master levels.

Although an individual will benefit from achieving a given qualification, the greater benefit is for the organization.

Educating and training a group of people at the same time on a specific topic will help ensure greater consistency and greater understanding of how to apply the material back in the organization.

Sending an employee to a public offering of a qualification will help the individual learn about different perspectives from the other attendees. It could also provide the opportunity to bring back lessons learned about how to apply the material back in the organization.

The following primarily applies to IT personnel who are not ITIL consultants, ITIL trainers or working for an ITSM tool vendor/reseller. There are a few criteria to consider in selecting the right course for you or your personnel.

Criterion No. 1

Look at the primary focus of the job and the primary focus of the selected groups. Is the focus of the personnel in question fixing and supporting something, are they involved with changes, release, and deployment or do they perform analysis and planning (making recommendations)? This will influence which phase of the Service Lifecycle to select.

Criterion No. 2

Are the people at the supervisory/management or are they strictly non-management? This will influence which stream to go for.

Criterion No. 3

Identify the individual primary and secondary learning styles of the people. Are they visual (prefers to read the material), auditory (prefers to listen to a presenter) or tactile (prefers the hands-on approach)? Everyone learns through a combination of these three styles. It is simply a matter of preference. This will influence the type of delivery method for the course.

The current delivery methods for courses include:

- Classroom in a public setting (delegates from different organizations at a public venue)
- Classroom in-house (within your company)
- Computer or web-based – self-paced
- Instructor-led remote – similar to a webcast set-up but with many sessions.

About the IT groups

Although an organization is likely to use other names, there are fundamentally four groups of people within an IT department. It is important for an individual to identify which group they belong to. This, along with their career aspirations, will assist them in determining which certification path to pursue.

The Service Operation book provides an excellent sample of the various groups found in the IT department. First, there are four functions:

- The Service Desk
- Technical Management
- Application Management
- IT Operations

Service Desk

The Service Desk is a function that is crucial to the whole concept of Service Management. It is the Single Point of Contact (SPOC) between the users and customers for the delivery and use of services. The Service Desk is customer-focused and is comprised of people with interpersonal skills, business awareness and a service oriented (value based) perspective.

Technical Management

Technical Management plays an important role in the design, testing, release and improvement of IT services. It provides guidance to IT Operations on how to best accomplish the ongoing operational management of technology and ensures a balance between the skill level, utilization and cost of these resources:

Application Management

Application Management is the function responsible for managing applications throughout their lifecycle and plays a role in all applications, whether purchased or developed in-house. One of the key decisions Application Management personnel contribute to is the decision of whether to buy an application or to build it in-house.

Application Management personnel also play an important role in the design, testing and improvement of applications that form part of IT services. It may be involved in development projects. However, these projects are not usually the same as those involving Applications Development teams.

IT Operations Management

IT Operations Management is the function responsible for executing the activities and performance standards defined during Service Design and tested during Service Transition. In this sense, IT Operations Management's role is primarily to maintain the status quo.

IT Operations Management consists of two roles:

- **IT Operations Control** oversees the day-to-day execution and monitoring of operational activities and events in the IT infrastructure
- **Facilities Management** manages the physical environment of the data center or backup facilities.

The four functions can be summarized in the following diagram. Of course, grouping and names will vary from organization to organization but Figure 2.7 provides a good representation of the primary focus of IT groups.

Why is there a requirement to attend a preparatory course before taking an Intermediate level exam?

The above is a valid question often asked by (prospective) attendees. They are allowed to take the Foundation exam without taking a preparatory course.

However, why would anyone want to 'dumb down' IT's credibility? Just as we are finally turning the corner and becoming more business focused and recognized by the business as an integral part of the organization's success and just as we are getting IT personnel to start thinking in terms of business requirements and business outcomes, this question comes up.

If people are allowed to take an ITIL Intermediate level exam without having to take a preparatory course, the following is likely to happen:

- It would greatly undermine the value of any of qualifications
- It would adversely affect the credibility of anyone who has attended a course

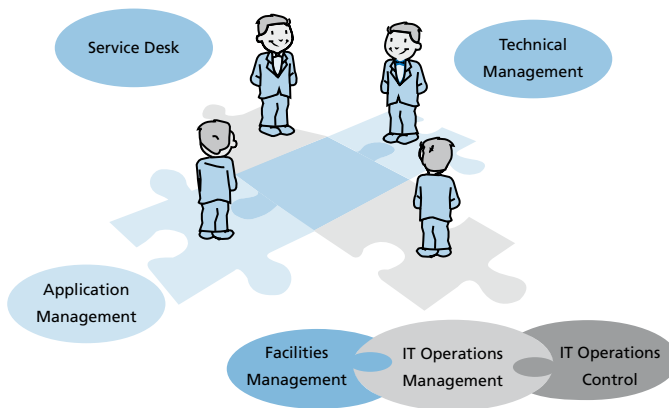


Figure 2.7 Service Operation functions

- ATOs would very likely to go out of business unless they changed their service offerings
- Consulting organizations and consultants would lose credibility
- The Service Management software tool vendors would be able to make all sorts of claims about the compliance or compatibility to the framework
- Book publishers would be unable to recruit reputable authors
- The IT department's credibility would likely to go down the drain

If people are allowed to take an ITIL Intermediate level exam without having to take a preparatory course, it will set the IT industry back about 20 years; right about the time ITIL was launched.

Is there any other businesses group that does not require their members to be properly qualified and/or certified? How can anyone claim to be an expert in any field without...

- Attending the courses?
- Reading the books?
- Passing exams?
- Practicing the knowledge?
- Keeping up-to-date?
- Consulting the literature forming their body of knowledge?

Does a recruiter considers an inexperienced recent graduate of a trade school such as a mechanic, a dental assistant, an electrician, a plumber, a carpenter, etc, to be an expert? These graduates may be very enthusiastic, have the right attitude, possess the right

aptitudes for their career of choice and be very good at what they do. However, they lack the so-called 'real-world' experience.

The above does not imply that some people cannot simply read the book, then take the exam and pass it. Many are capable of achieving this. However, allowing people to take the ITIL intermediate exams without attending a course would severely undermine the credibility of the whole qualification scheme.

There are organizations such as the Project Management Institute® (www.pmi.org) and ISACA®, previously known as the Information Systems Audit and Control Association, (www.isaca.org) where people can take exams without taking a course.

However, both these organizations require proof of experience in their domain as well as meeting requirements. It is also strongly suggested that taking a course will greatly increase your chances of passing the exams. Additionally, exam preparation courses are usually mandatory.

In the case of ISACA, the designation is awarded to those individuals with an interest in specific topics who have met and continue to meet the requirements. Please visit their website for exact details on their various certifications and their requirements.

In the case of PMI, individuals have to obtain a credential, prepare for the exam, and maintain their credentials.

Pop quiz

Question: Will you become physically fit if you buy a membership to a gym?

Answer: No

Question: Will you become physically fit if you buy the latest gym-wear fashion clothes and accessories?

Answer: No

Question: Will you become physically fit if you go to the gym?

Answer: No

Question: Why is the answer 'no' for the above questions?

Answer: Because you actually have to use the equipment properly, follow a diverse exercise program and exercise on a regular basis.

Competition for your education budget

There is a myriad of certifications competing for your education, training, and certification budget. A recent search conducted in the fall of 2010 on the internet yielded more than 300 certifications related to IT alone. Here is a list, in alphabetical order, of the most popular categories.

- Architecture (from design to support)
- Assessments
- College and university courses, certificates and degrees
- Consultancy
- Databases
- Executive MBA and management courses
- Frameworks and methodologies
- Governance
- Hardware (from design to support)
- People skills
- Program management
- Programming
- Project management
- Risk management
- Software (from design to support)

...and many others

To certify or not

Note from the author

Allow me to misquote one of the most well-known lines from William Shakespeare; I am speaking of course of Hamlet, Act 3, Scene 1.

‘To certify or not to certify, that is the question’.

Looking at the spectrum of acceptance of certifications (right hand side) we have organizations who truly believe that educating, training, and certifying their personnel are a worthwhile investment. These organizations usually have formal education and training programs in place. Although they know that some employees may eventually leave, taking their certifications with them, these organizations still promote a nurturing culture that encourages people to acquire and share knowledge.

At the other end of the spectrum (left hand side) are ‘paranoid’ organizations that refuse spending money or time on education and training. They believe the personnel will leave as soon as they obtain their certification. They do not want any other organizations to be the beneficiary of their education budgets. They prefer to hire people with the appropriate certifications. These organizations also believe that ‘on-the-job’ training is sufficient. Luckily, there are far more of the former than the latter type of organizations.

Anecdote from the author

A long time ago, I was involved with an organization’s Help Desk Manager (this was in the pre-ITIL era) who believed she could simply take someone off the street, put them in front of a phone, give them a procedure manual and ‘voila!’ a new help desk agent ‘auto-magically’ appeared.

This did not work very well, as you can imagine. Trust me on that one.

Organizations in general are not necessarily the ones promoting an anti-education culture. Specific individual managers are usually the culprits. These managers, at any level, usually come up with all sorts of reasons against education for their personnel. Some of the reasons are valid such as slow sales, higher costs, unexpected losses, or cash flow issues to name but a few. These managers may simply prefer to hire someone who already has the necessary certifications.

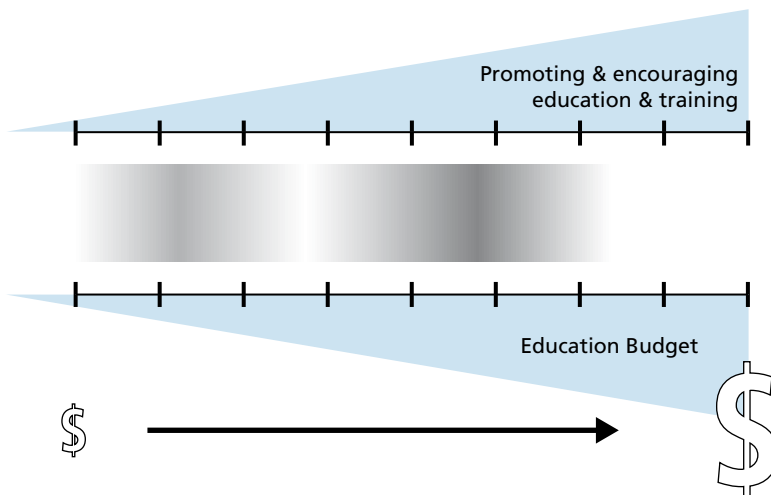


Figure 2.8 Organizational belief in education is proportional to its education budget

Frameworks, methodologies and standards

Before we start looking at ITIL Intermediate qualifications, it is important to differentiate between frameworks and methodologies. Let us start with the following definitions.

Framework⁸

Definition of Framework

1. "A" a basic conceptual structure
"B" a skeletal, openwork, or structural frame
2. frame of reference

Figure 2.9 Framework

Methodology⁹

Definition of Methodology

1. a body of methods, rules, and postulates employed by a discipline; a particular procedure or set of procedures
2. the analysis of the principles or procedures of inquiry in a particular field

Figure 2.10 Methodology

⁸ Source: www.merriam-webster.com/

⁹ Source: www.merriam-webster.com/

Method¹⁰

Definition of Methodology

1. a procedure or process for attaining an object:
 - a. (1): a systematic procedure, technique, or mode of inquiry employed by or proper to particular discipline or art
 - (2) : a systematic plan followed in presenting material for instruction
 - b. (1): a way, technique, or process of or for doing something
 - (2) : a body skills or techniques
2. a discipline that deals with the principles and techniques or scientific inquiry

Figure 2.11 Method

ITIL is a framework while PMI or PRINCE2 are methodologies. Two organizations, one large, the other small, and both using the PMI methodology for projects, would end up with very similar supporting documentation regardless of the project type and size. On the other hand, these same two organizations, this time using ITIL, will end up with very different supporting documentation.

A comparative analogy

Process: Two houses are being built side by side. The blueprints, the contractor, the trade people are the same and the materials all come from the same sources. Yet when the two families move in, the houses are different. Their owners have decorated and furnished their home according to their personal taste and available budgets. This is a case of using the same framework (for both houses) yet we have two different results.

Project: A developer has hired an architectural firm and a contracting firm to build an office tower and a housing development. The architect and contractor will use the same project methodology to execute both projects. Of course, the logistics will be different but the project stages will be the same.

¹⁰ Source: www.merriam-webster.com/

Which framework or methodology should you use?

Some people and organizations still believe they have no need to look at ITIL if they are using PMI and vice versa. This is a narrow view since most methodologies and frameworks are complementary. Other organizations have claimed that they have tried all the frameworks and methodologies to get their IT department 'in order' but things always go back to what they were before.

There are two primary reasons for these failures. One reason is the lack of continuous effort once the 'project' is over; the other reason is failing to embed the changes into the culture of the organization¹¹. This means changing the attitudes, behaviors and culture of the organization¹².

There are many methodologies¹³ available. Organizations should not simply look at them; they should seriously investigate and consider them. There are many articles, whitepapers, and books on this matter.

A good reference is Frameworks for IT Management¹⁴ available as a book or a pocket guide. This book covers 22 frameworks and methodologies classified into five major categories. They are, in alphabetical order:

- Information Management
- IT Governance
- Project Management
- Quality Improvement
- Quality Management and Business Process Management

See Appendix E for the complete list of frameworks and methodologies.

Evidently, budgets are limited, time is a precious commodity, 'business as usual' is still required, and there are numerous pressures on the organization coming from various internal and external sources. This means that organizations must identify their most pressing needs and address them.

11 For more details on this, please refer to Leading Change and/or The Heart of Change by John P. Kotter

12 The ABC of ICT by Paul Wilkinson, Jan Schilt

13 ITIL V3 Service Design book (OGC, published by TSO)

14 Van Haren Publishing and itSMF International – www.vanharen.net – www.itsmfi.org

Summary: where do you start?

Only you and your organization can answer this question. However, framework and methodology consulting organizations, software tool vendors, and not-for-profit independent and internationally recognized forums and associations will try to influence your decision.

This is normal practice and you will be bombarded with information from every angle. Nevertheless, pay attention to this information. Log on to the websites of these organizations. Compare the information between vendors offering the same framework or methodology. Ask for independent research and journal articles.

Join the recognized independent forums. Most of them have a free membership option providing access to a lot of good information. Attend conferences, if not physically, then webinars are a cheap alternative.

Keep in mind the four Ps of Service Design; People, Process, Products and Partners.

	People skills	Process knowledge	Product knowledge	Partners Relation
Architecture (from design to support)			✓	
Assessments		✓		
College and university courses, certificates and degrees	✓			
Consultancy	✓			✓
Databases			✓	
Executive MBA and management courses	✓			
Frameworks and methodologies	✓	✓		
Governance	✓	✓		✓
Hardware (from design to support)			✓	
People skills (includes negotiation)	✓			✓
Program management	✓			
Programming			✓	
Project management	✓			
Risk management	✓			
Software (from design to support)			✓	

Table 2.1 Mapping 4Ps of Service Design to education