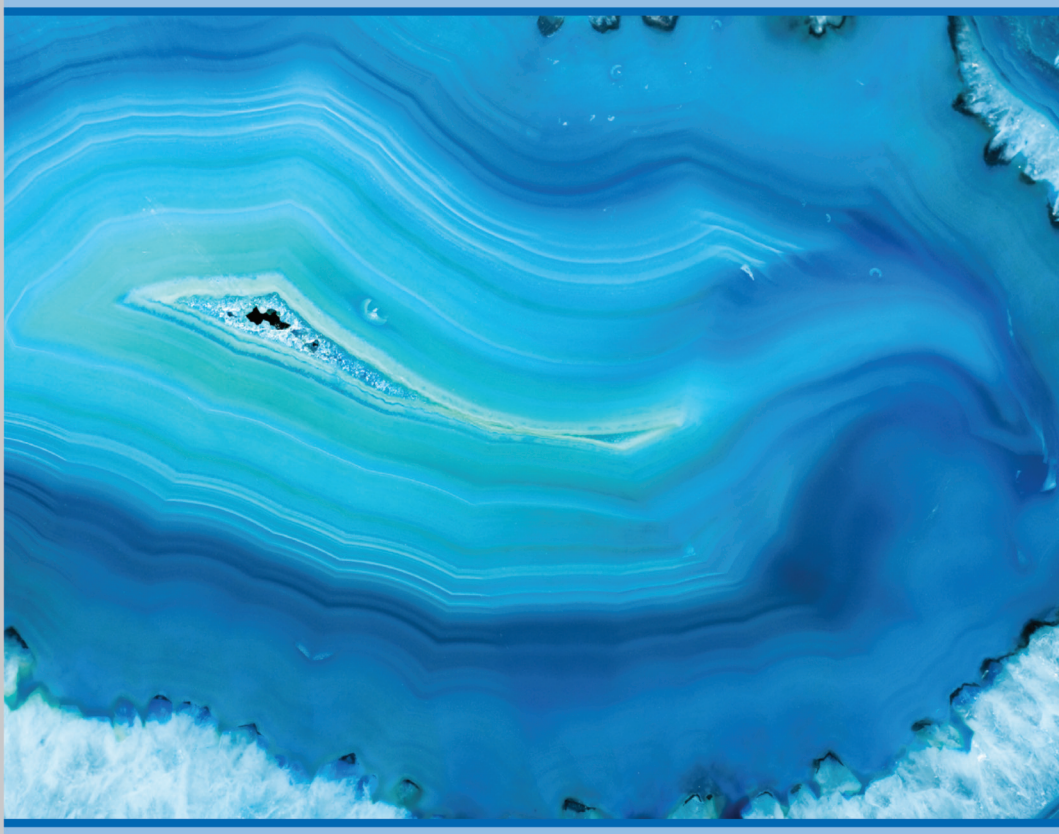
BEST PRACTICE

The IT Service Part 1

The Essentials



Pierre Bernard

Van Haren PUBLISHING

The IT Service
Part 1 The Essentials

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The IT Service
Part 1 The Essentials

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Colophon

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1 See appendix E for an overview explanation of what ITIL is

Foreword

From the author

Throughout this book, I am providing my own opinion in the form of author's notes or rants. I am by nature pragmatic and positive but prone to sarcasm at times. This is who I am and this is part of my writing style. I don't intend this book to be academic or a simple regurgitation of topics found in other books; that would be plagiarism, not to mention useless.

The intent of this book is to explore what a service really is. To accomplish this, I need at times to quote sources verbatim then add the real, and sometimes my own, interpretation of relationships between the topics. Throughout my career I found that people often roll their eyes when they read something and up come comments such as "*as if', "yeah, right', "that will never work here', "looks good in theory"* or one of my favourites "*what the <expletive> is the author thinking".*

I actually do expect some readers to roll their eyes at some parts of this book. This book can not be everything to everyone. It assumes the reader has either read on the topic of service management, is knowledgeable regarding this topic or has access to the literature quoted in this book for further reading. I do expect criticism (both good – I hope – and bad). It is OK to have different opinions and interpretations. This is healthy for our industry.

I am not implying in my author's notes and rants that everyone or every organisation is like that. The rants, especially, are about extreme and – hopefully – rare cases. Although many readers may perceive that things are not going so well in their organisations – and this may actually be the case – there are great things done in all organisations by fantastic people.

In my humble opinion, every organisation performs all the activities of a framework in some way, shape, or form. They may not realise this is what they are doing or they may have another name for it. Please do not discard off-hand what you are doing. It might be as good if not better than what is described by the various frameworks

In too many situations the naysayers and the malcontent are the most vocal. Additionally policies and rules, affecting everyone, are put in place because a handful of individuals abused the system. Just read the newspaper or watch the news for examples.

I hope this book will provide you with a sense of having made something "*theoretical*" into something more practical and more pragmatic. I sincerely hope this book will be useful to you and your organisation in your service management journey.

Make it simple and keep it simple…

Regards,

Pierre Bernard
CTDP, ITIL Expert

Acknowledgements

Van Haren Publishing has worked on several projects with Pierre Bernard, the Author. Previously his work has been to reflect a standard or to review a topic. Here, for the first time, Pierre has been able to bring to the reader a view established from experience of IT Service within the real world. Van Haren Publishing would like to thank Pierre for such a thorough and useful piece of work. In addition, the practical examples and real-life reflections ensure that the guidance is immensely helpful to anyone who works within this environment. We would like to thank Pierre for his thorough approach, his strong writing ability and also for his ceaseless good humour which is expressed so clearly in this book.

As Publishers we have met and exchanged views with many people across the world. We are extremely fortunate to consider these people not only colleagues but also good friends who have spent many hours making sure that the works we release into the marketplace do serve that market with beneficial best practice.

For this particular product it is an honour for us to thank the following people who have invested much time and effort reviewing this manuscript:

- Claire Agutter, ITIL Training Zone, UK
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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 is an ITIL Expert as well as having passed all intermediate qualifications. Pierre has taught thousands of people around the world.

Pierre has worked in the retail industry for over 15 years. This is where various mentors and coaches helped Pierre better understand the concept of a service from an end-to-end perspective as well as providing excellent customer service. This is also where Pierre learned the value and benefits of teamwork as well as knowledge sharing.

Preface

'Why make something simple when you can make it complicated?'

–Pierre Bernard

The above is just a jest really. It is about pointing out the tendency of many to overcomplicate simple things and this applies to services, the topic of this book. In my humble opinion, a service is not a complicated concept. I don't want to claim that non-IT personnel know this instinctively or that IT personnel are totally ignorant of what a service is. What I am saying is that people have difficulty translating a simple textbook definition into something tangible, yet easily recognised and usable. This being said, in the experience of many IT process consultants and trainers, many IT personnel have difficulty in easily grasping the concept.

Not being a psychologist and relying primarily on my observations and discussions with fellow IT process consultants and trainers, I can only hypothesise as to the real reasons behind this observation.

As I have already said, a service is not a complicated concept. However, because of our business environment and culture, our attitudes and behaviours, we sometimes can't see beyond our area of focus; we can't see the forest for the trees so to speak. The apparent complexity of the concept of a service comes from all the interlocking parts and their dynamics making up the service.

When people buy a motor vehicle, they are interested in a mode of transportation to bring them from the proverbial point A to point B. They are not interested in all the little parts making up the vehicle. Similarly, people are interested in the business outcomes a service will help deliver; they are not interested in what makes up the IT system or the IT service.

A motor vehicle dashboard only displays important information to the driver for the safe operation of the vehicle. This has two purposes. The first is to display the half-dozen or so really important pieces of information a driver needs. The second is for safety reasons; displaying too much information at once could become a distractor and adversely affect the safe operation of the vehicle. Similarly, a service should only provide the customer with important information for the proper delivery of the business outcomes expected.

This may be an oversimplification but the analogy should "drive" (pun intended) the point home. Make your services simple to understand and use for your customer and provide the information the customer really needs; that is the information they asked for.

It may seem a bit like an oxymoron or a joke to claim that a nearly 300 page book will simplify things, but it has some truth in it. One of my intents, throughout this book, is to point out where and possibly why people make a service a complicated thing. So, why write a book with nearly 300 pages on services? The answer is simple. Because too many books and too many people make it sound complicated. A service is not that complicated. Sure, there are a lot of components and there may be a lot of paperwork involved but, like many things in life, a little planning goes a long way in preventing issues later.

Here is a quote regarding planning. We need to plan as things do not materialise out of thin air.

> *In all things, success depends on previous preparation, and without such previous preparation there is sure to be failure*
>
> *– Confucius*

Contents

1 Introduction

In the late 1990s two things happened. One was a simple request to add two digits to the date field to allow business applications to properly differentiate dates between the 21st and 20th centuries. The second was that the IT organisation was given "*carte blanche*" in regards to getting all computer systems ready for the change of millennium, an event known as Y2K, the year 2000.

It turned out to be a non-event.

Although the IT organisation played a significant part in ensuring nothing troublesome happened, senior managers and executives became wearied of the huge amount of money spent by the IT organisation. Following on the heels of Y2K two events further compounded the issue. The first was the event now referred to as the "*tech bubble*" which was followed by the market crash of 2001-2002. These two events ensured that the senior management team would start to clamp down on unnecessary expenses and started demanding of the IT organisation to demonstrate organisational value and to prove its worth and contribution in the appropriate language: money.

The following is an excerpt taken from an article in the Economist on June 14th 2011 by Mr. Steve Blank[1].

> First, let us start with a definition of a tech bubble.
>
> A tech bubble is the rapid inflation in the valuation of public and private technology companies that exceeds their fundamental value by a large margin. It is accompanied by the rationalisation of the new pricing, and then followed by a spectacular crash in value. (It also has the "smart money" investing early and taking profits before the crash.)
>
> Bubbles are not new; we have had them for hundreds of years (the Tulip Mania, South Sea Company, Mississippi Company, etc.). And in the last decade, we have had the dot.com bust and the housing bubble.

In light of this market crash as well as other financial scandals, various countries around the world introduced legislations in an attempt to prevent such abuse. These legislations effectively place the outputs of the IT organisation and of the Chief Information Officer (CIO) under a huge magnifying glass. Although already common in many industries, governance, compliance and transparency leaped to the forefront of new issues the IT organisation now had to deal with.

1 http://www.economist.com/debate/days/view/710

The IT organisation started to look for ways to quickly learn the impact of the compliance legislations on its operations. The answer eventually became apparent: adopt and adapt internationally recognised frameworks and methodologies.

However, since there are many frameworks and methodologies, most of them complementary to each other, the IT profession turned to a more generic approach: service management.

Adopting a service management approach within an IT organisation is quite an undertaking; there is no one "tool" to address all issues. The IT organisation must adapt or become irrelevant. This does not mean that everything will become outsourced anytime soon. It will not matter who will do it or where it will be done; whoever provides the services must embrace service management proven practices. This means changing the attitudes of its employees, their IS-centric behaviours and the overall culture of the IT organisation. Certainly a large component of being service management oriented means providing regular relevant reporting to and for the business. This includes reporting financial results aligned with the organisational goals and objectives. The IT organisation must approach reporting from a four pronged approach, financial, service, process and technical. Of course technical will always be relevant but the two primary reporting concerns should be financial and service oriented.

A second market crash and a near global recession between 2007 and 210 added to the woes of many organisations; very few were unaffected. If the IT organisation thought that governance and compliance were a fad, they were sadly mistaken. Governments at all levels were now demanding governance, compliance, and transparency from their constituents. Stakeholders at all levels are now subject to fines and penalties under various legislations.

The advent of social media, wireless technologies, security, the upcoming new computer-savvy generations, and the retirement of the "baby-boomers" generation in upcoming years will only add to the complexity of issues.

The IT organisation has always been part of the overall organisation. There is a caveat to this. The IT organisation did not always see itself as part of the business and neither did the business. The IT organisation should always have been a part of the organisation like all other business units and functions. We only have to look back at the period from the late 1960s to the early 1990s to see that the IT organisation has too long been a silo, set aside from the rest of the organisation. It is really within the last decade that both the business and the IT organisation together came to realise the IT organisation should break down its walls, behave as the full fledged business unit that it really is. It is also important for the IT organisation to use and understand the language of business, see itself as but one (albeit an important one) part of the organisation and to always consider how its action affects the bottom line of the organisation.

If this is not done, then IT professionals must act or prepare for obsolescence.

The Island of no services

Imagine if you will that you live alone on an island. There is no one else but you. You are not shipwrecked or lost; you simply live on the island. At your disposal are all the basic elements to sustain you whether you are vegan, vegetarian or, like most people, an omnivore. There are fresh water sources, caves to live in, kindling and driftwood to make fire, fruits, vegetables, plants, land animals, birds, fresh water and salt water marine life. I'll make it easy; there are no predators either.

However, there is no technology of any kind. You do not even have a rudimentary knife, nothing that could help you. You have to make everything: fire, shelter, food, tools, clothing, sandals, sunshade, etc.

Do not expect any rescue of any kind at any time either. As I already mentioned: you are alone.

Since you have to do everything yourself it means there are no services available to you at all. Here is why.

ITIL® defines a service as follows:

> A service is a means of delivering value to customers by facilitating outcomes customers want to achieve without the ownership of specific costs and risks.

- No outcomes will be facilitated by someone else as you are both customer and provider
- You own all the costs (labour, time, education, training, skills, resources, etc)
- You own all the risks (being alone, suffering the elements, injuries, diseases, balanced diet, etc)

If, and only if, someone else was present, then both people could provide something to the other. At certain times, one of you would be the provider and at other times, the customer. Let us be nice here; no one enslaves or dominates the other; you are both equal in everything. After all, it is my scenario; therefore, I make the rules.

So, if there are at least two of you on the island, here is what would happen.

- One person, the ***[provider]***, would deliver value to the other, the ***[customer]***
- The ***[provider]*** facilitates outcomes the ***[customer]*** wants to achieve
- Without the ***[customer]*** owning specific costs
- Without the ***[customer]*** owning specific risks
- These costs and risks are owned by the ***[provider]***

The payment method (bartering) would eventually be a common understanding and agreement between the two of you based on each other's skills, knowledge, and ability.

However, since you are alone, the above is pointless. For now…

However, we do not live alone. We live in societies offering all kinds of services. These services are offered by providers who encounter specific costs and risks. The services are consumed by customers as they deem these services to be of value to them and help them facilitate business outcomes. These concepts apply to all facets of the business world including the IT organisation.

Now, for some concepts…

Let us start by looking at some of the key terms that will be used throughout this book. The list is in alphabetical order.

Table 1.1 Definitions of service specific terms

Cost	The amount of money spent **BY THE PROVIDER** on delivering a service to a customer. Resources that cost money are applications, infrastructure, information, and people. Costs consist of real cost (money) and notional cost such as people's time, and depreciation.
Customer	Someone who buys goods or services. The customer of an IT service provider is the person or group that defines and agrees the Service Level Targets. The term "customer" is also sometimes informally used to mean users, for example "this is a customer-focused organisation'.
External Customer	Someone, outside the organisation, who buys goods or services from an organisation but not from the internal IT provider. The internal IT provider is involved at some point during the business processes involved.
Internal Customer	Someone inside the organisation who buys goods or services from an internal IT provider. The customer of an internal IT service provider is the person or group that help defines and agrees the Service Level Targets.
Outcome	The result of carrying out an activity; following a process; delivering an IT service, etc. The term "outcome" is used to refer to intended results, as well as to actual results.
Price	The amount of money spent **BY THE CUSTOMER** in exchange for a service received from a provider.
Provider	An organisation supplying services to one or more internal customers or external customers. "Service provider" is often used as an abbreviation for IT service provider
Risk	A possible event that could cause harm or loss, or affect the ability to achieve Objectives. A risk is measured by the probability of a threat, the vulnerability of the asset to that threat, and the impact it would have if it occurred.
Value	○ A fair return or equivalent in goods, services, or money for something exchanged ○ The monetary worth of something ○ Relative worth, utility, or importance
Internal service	This is a service delivered by IT to departments or business units in the same organisation. The internal services directly or indirectly enable and support business outcomes
External service	This is a service delivered by IT to external customers. These external customers directly interact with the business service.

It is always important for the provider and for the customer to formally agree (more on this later in this book) on the meaning of various terms.

As mentioned previously, and at the risk of repeating the information, ITIL defines a service as:

> A service is a means of delivering value to customers by facilitating outcomes customers want to achieve without the ownership of specific costs and risks.

Looking at the definition from the perspective of the provider and the customer may provide some additional light into this definition.

- An organisation, the ***[provider]***, delivers something to another organisation, the ***[customer].*** This "something" is deemed by the customer to carry a certain value
- The ***[provider]*** facilitates the outcomes the ***[customer]*** wants to achieve
- Without the ***[customer]*** owning specific costs
- Without the ***[customer]*** owning specific risks
- Theses costs and risks are owned by the ***[provider]***

In the eyes of the customer, the services are provided by the internal IT organisation. The customers and end-users are quite likely to be aware some services - or at least part of some services - are actually delivered by a third party. However, the internal business customers view the internal IT organisation as one entity. From a strategic standpoint, the IT organisation attempts to be offering a competitive alternative to outright and (near) total outsourcing.

The services provided can be delivered from a variety of sources and in various combinations:

- An internal IT organisation within the customer organisation trying to do nearly everything itself
- One or more (IS) services purchased by the internal IT provider from various types of external (IS) providers
  - Commodities supplier
  - Operational supplier
  - Tactical supplier
  - Strategic supplier (usually a partnership)
- The third party organisation can and often does make use of external parties as well. These additional organisations are often referred to as sub-contractors.
- One or more services purchased by the organisation without the involvement of the internal IT provider.

The concepts related to providers will be discussed later in this book.

There is another way to look at the service definition, which is much more powerful for any provider or for anyone working in a provider organisation.

A service is a means of delivering **VALUE** to customers by facilitating **OUTCOMES** customers want to achieve without the ownership of specific **COSTS** and **RISKS**.

The above is not a complicated concept to understand. Whatever you do, ask yourself the following questions. Please refer to Table 1.1 for the definition of the terms 'value', 'outcome', 'cost', and 'risk'.

- How does the customer define **VALUE**?
  - Does your present activity bring value to the customer?
  - Do both parties understand and agree on the definition of value?
  - What are the preferences of the customers regarding various services?
  - What are the customer's perceptions of the services required or already in place?
  - What are the customer's desired attributes of the service?

- What is the current desired business **OUTCOME** of the customer?
  - What are the functional areas or operational units inside the customer area?
  - What are the major business processes within the function or unit of the customer?
  - What are the deliverables, products, or outcomes of each business process?
  - Does your present activity enable the current desired business outcome of the customer?
  - Does your present activity support the current desired business outcome of the customer?
  - Do both parties understand and agree on the definition of outcome?

- What is the **COST** to the IT provider of your current activity compared to the overall revenue stream?
  - What happens if your activity incurs cost overruns?
  - What happens if your activity actually costs less to provide than expected?
  - Is the internal IT provider a Profit and Loss centre (P&L)?
  - If the internal IT provider charges for its services, do both parties understand and agree on what is being charged?
  - If the internal IT provider charges for its services, do both parties understand and agree on the price structure?

- What are the customer and service assets at risk?
  - What are the service assets at risks?
  - What are the threats to the customer and service assets?
  - What are the vulnerabilities of the customer and service assets in regards to the threats identified?
  - Do both parties understand and agree on the risks (real or perceived) involved?
  - What is the risk of not meeting the customer requirements?
  - What is the risk of meeting the customer requirements?
  - What is the risk of exceeding the customer requirements?

Does value mean quality?

The heading above is a good question. One can suppose that many individuals might equate one with the other. However, such is not the case.

Quality can be defined in many ways: For example, the following standards organisations and individuals define quality as follows:

Table 1.2 Definitions of "quality" according to various standards

ISO 9000	*'Degree to which a set of inherent characteristics fulfils requirements'*
Six Sigma	*'Number of defects per million opportunities'*
Philip B. Crosby	*'Conformance to requirements'*
Joseph M. Juran	*'Fitness for use'*
Noriaki Kano (and others)	*'Products and services that meet or exceed customers" expectations'*
American Society for Quality	*'A subjective term for which each person has his or her own definition. In technical usage, quality can have two meanings:* • *The characteristics of a product or service that bear on its ability to satisfy stated or implied needs* • *A product or service free of deficiencies'*
Peter Drucker	*'Quality in a product or service is not what the supplier puts in. It is what the customer gets out and is willing to pay for'*
W. Edwards Deming	*'The efficient production of the quality that the market expects'*

As one can clearly see, value and quality are not synonymous. Value is a combination of "*fit for usage*" and "*fit for purpose*'. The value of something can be expressed in intangible terms and can be related to sentiments or fond memories.

Quality, on the other hand, implies that the product or service meets some specific set of criteria set by the customer.

Of course, both can be subjective and are open for debate. However, for the purpose of this book, *quality* is an element of *value*.

2 The case study

Meet our case study – "THE ORGANISATION"

Disclaimer from the author:

The reasoning for using a case study is to help illustrate the concepts and principles of service management in a more concrete and practical way. As the author, I perfectly understand and accept that not everyone will be able to directly identify with the given situation.

The information about **"THE ORGANISATION"**, its projects, and all its objectives are entirely fictitious. Although I am using snippets from a wide range of organisations, any resemblance with people, events, and situations is entirely coincidental. If the reader believes they recognise his or her organisation or situation, I would like to point out that in my experience, research, and communication with service management consultants, trainers, and software vendors, most organisations experience virtually the same types of issues regardless of their industry, size, and complexity.

Geographical location

For the sake of simplicity, the organisation is called ***"THE ORGANISATION".*** Its headquarters are located in a growing municipality in the suburbs of a large metropolis somewhere on this planet.

For the purpose of illustration, "THE ORGANISATION" might be any organisation to accommodate various examples. "THE ORGANISATION" might be involved in research and development manufacturing, food processing, packaging, electronics, motor vehicles/transportation, business services, chemical/pharmaceutical, environmental, or might even be a governmental agency. "THE ORGANISATION" will have offices in one or many countries, on one, many or all continents, except for Antarctica.

THE ORGANISATION'S plans for the future

"THE ORGANISATION" has developed plans for the future outlined in a strategic plan called Global Proven Practice Focus (GPPF). Issues such as stakeholder equity, responsible management, community involvement, managed growth, environmental stewardship, financial management, eco-friendly transportation, fair trade, ethical research and development, transparency and governance, and excellence in government are addressed in this document.

Specific examples will be used throughout the book.

THE ORGANISATION'S major initiatives

"THE ORGANISATION" has three major initiatives for the upcoming year.

- Install "smart meters" at all organisation-owned facilities. Install control systems water, in order to better manage gas, electricity, heating, air conditioning, and water consumption throughout "THE ORGANISATION"
- Replace copper wiring wide area networks (WANs) with fibre optics cabling to connect all offices. Presently, only about one quarter of all offices are using fibre optics. This requires three-quarters of "THE ORGANISATION" to be re-wired. Strategic partnerships with a telecommunication organisation are being discussed.
- Become a model eco-friendly corporate citizen by converting to renewable energy sources such as solar panels and wind turbines. Implement roof gardens to recycle rain water, help cool down the edifice and grow vegetable gardens for the local communities.

THE ORGANISATION'S executives

Senior executives (throughout "THE ORGANISATION") not only have a limited set of resources but have a finite set of capabilities as well. The key to success is to wisely deploy and engage the available resources by using the existing capabilities. Over time additional information will be collected and analysed thus helping build and expand the capabilities. However, building capabilities must be a conscious, concerted, and planned effort involving everyone in the organisation.

When making business decisions, the executives must understand not only the risks to the enterprise, but also the impact and possible ramifications of their business decisions.

Example 2.1 – The vision, mission, goals and objectives

The executives have come up with the following vision and mission statements as well as a set of goals and objectives.

A. Vision

- *To be recognised as the world leader in using and promoting the use of eco-friendly energy sources and becoming a friendly corporate citizen by providing free and secure internet access to developing communities*

B. Mission

- *To efficiently deliver quality products and services to our customers locally and globally*
- *To provide a safe and rewarding work environment for our employees*
- *To innovate with new products and services to meet our customers' changing needs*

- *To provide our shareholders with a superior rate of return*
- *To be a community partner*

C. Goals

- *Convert all fossil fuel energy sources to eco-friendly energy sources such as solar and wind*
- *Install smart meters at all of our locations*
- *Convert all copper-based network and internet connections to fibre-optics*

D. Objectives (for the next two years)

- *Plan for the conversion of all locations using fossil fuel energy sources to eco-friendly sources*
- *Convert all existing fossil-fuel locations to eco-friendly sources*
- *Plan for the conversion of copper-based network and internet connections to fibre-optics*
- *Convert all connectivity cabling with fibre-optic*
- *Resell all copper to recycling industries and use the revenues to equip local schools and community centres with hot-spots for internet access*

Example 2.2 – Funding the organisation's goals and objectives

The organisation has identified three basic strategic investments or allocation categories:

Table 2.1 Case study funding perspectives

Run the business	Identify the activities or projects that the various departments are involved with to help run the business as usual for the organisation • Changes to existing services • Maintenance • Operational processes • Wi-Fi project
Grow the business	Identify the activities or projects that the various departments are involved with to help grow the services the organisation offers to its market space: • Deliver requirements for new functionalities • Streamline processes by adopting and adapting proven practices • Assist business units in streamline their business processes
Transform the business	Identify the activities or projects that the various departments are involved with to help transform the services the organisation offers while maintaining or enhancing the quality of life for its market space: • Involvement in eco-friendly energy sources initiatives

Example 2.3 – A message from the CEO[1]

The following is the message from the CEO sent to all personnel as part of their communication plan.

A message from the Chief Executive Officer (CEO) – Corporate address, Month, day, year

… There is much in common, and I believe that this organisation has the responsibility and the willingness to listen, discuss, analyse, and make positive decisions for the organisation. As the CEO, I promise to all employees of this organisation that although you may not agree with all the decisions made, you will know that we listened to you and you will understand how we reached a decision.

So, what has to happen for the Board of Directors to believe it has been successful in one, two or even three years from now? To achieve this we must:

- Re-establish trust between our organisation, our customers and our partners
- Improve the trust and working relationship between the board, the management team and the personnel
- Focus on our goals and objectives, prioritise them as well as effectively and efficiently using our resources
- Address our weaknesses head on, reach consensus regarding the appropriate opportunities to seize, and be decisive regarding every future action
- Continue to improve and maintain the quality of our products and services
- Continue to support our local communities
- Advocate for a more responsible approach to environmental issues

I would like to take this opportunity to remind everyone of our mission statement. Your management team will meet with all of you to discuss our goals and objectives in further details. This discussion will include how these goals and objectives become part of your specific areas.

Our Mission Statement:

- To efficiently deliver quality products and services to our customers locally and globally
- To provide a safe and rewarding work environment for our employees
- To innovate with new products and services to meet our customers' changing needs
- To provide our shareholders with a superior rate of return
- To be a community partner

Thank you for your time and let's all work together to make our great organisation even greater

Regards,

Signed: CEO

1 Adapted from the ORGANISATION's website – January 2011

Example 2.4 – Communication

Marketing, advertising[2], and the internal awareness campaign

The communication around the installation and the eventual launch of the smart meters, use of renewable energy sources, and the greening of office roofs started about a year before any of these were scheduled for installation. Articles were published in local and national newspapers, pamphlets from the organisation were sent to existing and prospective customers, and television ads were broadcasted. More targeted information was distributed before and during each phases of the rollout. An internal communication plan was developed and the awareness campaign is ongoing to inform all personnel of these projects.

A more detailed communication campaign was conducted about the Wi-Fi project. The campaign included activities such as internal webcasts, group meetings, regular reminders at the beginning of many meetings; even posters were mounted at the various locations where Wi-Fi was coming up.

Impact on the organisation's personnel[3]

The following is a summary of the impact on various business units (departments) within the organisation regarding the deployment and installation of the smart meters.

Table 2.2 Impact of business initiatives on various departments

All	• Lead by example. Adopting eco-friendly attitudes, behaviours, and mindset. • The organisation's employees cannot be seen or perceived as wasteful by the local residents and businesses
Organisation planning	• Planning, scheduling and coordination of resources for the conversion to smart meters and to Wi-Fi • Communication and coordination with all offices • Utilisation, management and coordination of contractors and sub-contractors • Coordination with the legal department for handling permits for new offices, renovation and expansion, etc. • Conversion to fibre-optic project • Procurement, storage, distribution and inventory of the Wi-Fi equipment • Handling procurement, inventory, and potentially defective equipment
Accounts payable	• Ensuring all payments to suppliers, contractors and sub-contractors are for work that is properly completed or correct equipment delivered
Legal department	• Ensuring all contractors and sub-contractors are legitimate, viable businesses • Handling and resolving complaints and disputes regarding work orders • Working closely in partnership with the various employee labour unions (syndicates) representing the organisation's employees
Marketing	• Design, creation and delivery of appropriate communication and marketing material to the appropriate targets within the appropriate phase • All material available in English and translated where mandated by local laws • Work with Public Relations in keeping the organisation's website updated with the most up-to-date and accurate information

2 Adapted from THE ORGANISATION's website – January 2011
3 Adapted from the ORGANISATION's website – January 2011

Public Relations	• Coordination with all offices regarding communication with the local media about eco-friendly initiatives • Coordination with the appropriate municipal, state, provincial and federal departments • Handling press releases • Communication with the media and the public • Communication with board of directors and the entire organisation for reciprocal updates • Work with Marketing in keeping the organisation's website updated with the most up-to-date and accurate information
Human resources	• Working closely in partnership with the various labour unions representing the organisation's employees to update and maintain job descriptions and new postings to reflect the new technology impact on job requirements • Updating the employee orientation manual and presentation to reflect the changes brought about by the new technologies
Health and safety	• Design, creation, communication, education and training of employees regarding all safety aspects for the new technological components: ○ Handling ○ Installation ○ Removal ○ Disposal ○ Etc.
Employee Labour Unions (syndicates)	• Working in partnership with the organisation regarding all aspects of the new initiatives

Example 2.5 – The issues for the IT organisation

The goals of the organisation are also those of the IT organisation. Here are the goals of the organisation and what they mean to the IT organisation.

Re-establish trust between our organisation, our customers, and our partners
- Business relationship management
- Supplier management

Improve the trust and working relationship between the board, the management team, and the personnel
- Service level management
- Develop appropriate capabilities

Focus on our goals and objectives; prioritise them as well as effectively and efficiently using our resources
- Optimal use of existing resources
- Develop appropriate service assets
- Develop appropriate customer assets

Address our weaknesses head on, reach consensus regarding the appropriate opportunities to seize, and be decisive regarding every future action
- SWOT analysis

- Business impact analysis
- Service strategy management
- Service portfolio management

Continue to improve and maintain the quality of our products and services
- Continual service improvement
- Understand value in customer terms

Continue to support our local communities
- Business relationship management
- Supplier management
- All lifecycle stages
- Adapt processes to include supporting IT services used by external customers

Advocate for a more responsible approach to environmental issues
- Adapt processes to include supporting IT services used by external customers
- Change attitudes, behaviours and culture of the IT organisation to be more service and customer service oriented

Addressing the issues

The market spaces define the opportunities for IT services to deliver value
- Identify the business outcomes each organisation department needs to achieve
- Identify the customer assets used to achieve these business outcomes
- Identify the IT organisation's service archetypes
- Map the customer assets to the service archetypes to create the appropriate market spaces. These show how each IT service enables the business outcomes for each division
- Update the catalogue of services and differentiate where the IT services are used either similarly or differently by the various organisation departments

Rollout and deployment[4]

The installation of the fibre-optic cabling consisted of two major phases: new office locations and retrofitting existing offices.

The organisation required the developers and builders of any new office or retail location to install the new fibre-optic cabling immediately. This requirement was introduced two years before the launch of the communication campaign.

4 Adapted from THE ORGANISATION's website – January 2011

Impact on the personnel of the IT organisation[5]

Table 2.3 Impact of business initiatives on IT functions

IS Management team	• Allocate resources to ○ Running the organisation's business as usual ○ Conversion to fibre-optic project ○ The Wi-Fi expansion project • Demonstrate ongoing commitment to the IT organisation • Address and handle issues as they arise
Technical Management	• Provide actual technical resources to ○ Run the organisation's business as usual ○ Conversion to fibre-optic project ○ The Wi-Fi expansion project • Work in partnership with ○ The business ○ Application Management ○ Application development ○ IS Operations Management ○ Service Desk ○ Suppliers • Identify, design, develop and maintain the required technical knowledge • Educate and train the other IT functions as well as the business as required
Application Management	• Provide actual application resources to ○ Run the organisation's business as usual ○ Conversion to fibre-optic project ○ The Wi-Fi expansion project • Work in partnership with ○ The business ○ Technical Management ○ Application development ○ IS Operations Management ○ Service Desk ○ Suppliers • Identify, design, develop and maintain the required application knowledge • Educate and train the other IT functions as well as the business as required
IS Operations Management	• Provide actual operational resources to ○ Run the organisation's business as usual ○ Conversion to fibre-optic project ○ The Wi-Fi expansion project • Work in partnership with ○ The business ○ Application Management ○ Application development ○ Technical Management ○ Service Desk ○ Suppliers • Identify, design, develop and maintain the required operational knowledge • Educate and train the other IT functions as well as the business as required

5 Adapted from THE ORGANISATION's website – January 2011

Service Desk	• Provide actual operational resources to ○ Run the organisation's business as usual ○ Conversion to fibre-optic project ○ The Wi-Fi expansion project • Work in partnership with ○ The business ○ Application Management ○ Application development ○ Technical Management ○ IS Operations Management ○ Suppliers • Identify, design, develop and maintain the required support knowledge • Educate and train the other IT functions as well as the business as required

Example 2.6 – Impact on the suppliers of the IT organisation[6]

→ Must be a vendor of record with this organisation
→ Follow all ethical and professional organisation guidelines
→ Follow communication and escalation channels as per procedures and guidelines
→ Immediately provide feedback regarding safety issues as per procedures and guidelines
→ Provide feedback regarding the scheduling, deployment and installation of products and services
→ Provide feedback regarding installation issues and delays on a timely basis as per procedures
→ Follow all billing procedures

6 Adapted from the ORGANISATION's website – January 2011