

**COURSEWARE**

**TRIM (The Rational IT Model™)**

**Foundation**

**Courseware**

## Colophon

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The Rational IT Model

## Foundation Course

Welcome

## About the courseware

This shows in which paragraph of the book you can find additional information.



The diagram illustrates the three components of the courseware. On the left is the 'Courseware' book. In the center is a 'Trainer slides' screen displaying the TRIM logo and 'The Rational IT Model Foundation Course'. On the right is the 'Study book' with 'BEST PRACTICE' and 'TRIM: THE RATIONAL IT MODEL' on its cover. A blue arrow points from the top of the study book to a text box in the upper right corner of the slide.

Courseware

Trainer slides

Study book

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The courseware consists of three components:

**Courseware** - (This book) contains text and images that will help you study the TRIM Foundation course, exercises, mock exams, rationales and syllabus.

**Trainer slides** - all slides are in the courseware together with explaining text.

**Study books** - Use this for extended reading and reference. The textbox on the trainer slides, shows in which paragraph of the study books you can find additional information.

## Course objectives

**Comprehension:**

- ✓ TRIM Governance model
- ✓ TRIM Service structure
- ✓ TRIM functions
- ✓ Continual Improvement methods

**Awareness:**

- ✓ Service Management concepts
- ✓ TRIM processes
- ✓ TRIM roles

If you have been reading about ITIL® and maybe even taken the Foundation certificate, you will probably recognize quite a lot. TRIM is based on ITIL®, and we have only tried to make it a bit more understandable and helping you relate to your company, your services and your customers.

Like most courses and trainings there are course objectives and this course is not an exception. We will talk about the TRIM Governance model as it is vital to understand the different roles within TRIM and how to apply it in our daily work. We will also talk about the service structure within TRIM and the functions that are used within the model.

Continual improvement is vital to ensure that your services are aligned to the business needs so we will talk about some methods for this.

We will also talk about Service Management concepts, TRIM processes and TRIM roles but as you can see these are grouped under awareness which means that we do not need to have the same detailed knowledge about these parts as the others that are grouped under Comprehension.

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## TRIM foundation exam

- ✓ 45 min. (+15 min. non-English native tongue)
- ✓ 20 multiple choice questions
- ✓ 13 correct answers to pass (65%)
- ✓ There are no trick questions!
- ✓ Closed book
- ✓ English dictionary allowed non-English native tongue

This training is aimed to give you the needed knowledge about TRIM to pass the examination. We really hope you will take the exam as it will be a proof for yourself and for others that you have a proven knowledge about the Rational IT Model – TRIM.

The exam consists of 20 multiple choice questions and you will be given 60 minutes to answer them unless English is your native language – in that case you will get 45 minutes. You will need 13 questions correct to pass the exam and get your certification. It is a closed-book-exam which means that you are not allowed to use any material such as notes and books during the exam. You are allowed though to use an English dictionary if English is not your native tongue.

## Overview

- ✓ Introduction to The Rational IT Model
- ✓ Key concepts of Service Management
- ✓ TRIM and the organization
  - ✓ Functions
  - ✓ Roles
- ✓ Service governance
- ✓ Phases and Processes
- ✓ Continual Improvement

## INTRODUCTION

Introduction to the Rational IT Model



## Introduction to The Rational IT Model



# Challenges for IT delivery

Introduction

- ✓ Understanding the business
- ✓ Adding value to the business
- ✓ Unclear expectations
- ✓ Unclear responsibilities
- ✓ Technology focused IT organizations
- ✓ Continual new demands from the business
- ✓ Demands for higher availability
- ✓ Agile development
- ✓ Cloud services

Historically one of the biggest problems for IT has been and continues to be the ability to understand the business needs. IT needs to be a strategic partner to the business and reach the level where our services are adding value to the business. Unless we can achieve that the business will look at IT and ask themselves – is all the money we are putting into IT worth it?

When we add some real value the business will instead look at IT and see an organisation that is a vital part for the business to reach their goals. Another thing that can cause problems is that the business doesn't really know what IT is delivering so they make up their own idea of what is included in the services. This can of course create some unclear expectations and quite surely - IT and the business have different views.

A partnership between two parties – in this case IT and the business – means that both parties have responsibilities. These needs to be clarified to avoid unclear responsibilities. The old classic IT-department is delivering technology and the business couldn't care less about the techie-stuff. The optimal is that IT can talk services and business value with the business and run the technology in the background as this is of course needed to support the business processes.

The world is changing constantly and so are the demands for services – both new services and existing services that needs to be changed. The fact that requirements and demands are changing over time is normal so we better get used to it and adapt our services over time. One thing we know for sure is that the business wants IT to reduce the cost and at the same time increase quality. This equation is of course tough but we can use new technology to make the delivery more efficient.

Development of new services needs to be quick. Time-to-market is essential and therefore we need to design our services so they can be easily adopted to changing requirements during the development. We need to adopt agile behaviour.

# Challenges for service delivery

Introduction

**Product**

- ✓ Produced and consumed at different times
- ✓ Constant conditions
- ✓ Specific demands for production
- ✓ Quality can be measured
- ✓ Specific purpose
- ✓ Production - stock - delivery
- ✓ Suppliers deliver to you
- ✓ ...

**Service**

- ✓ Produced and consumed simultaneously
- ✓ Changing conditions
- ✓ Changing demands
- ✓ Value is perceived by the customer
- ✓ Changing/multiple purpose
- ✓ Continuous production
- ✓ All suppliers deliver together, simultaneously
- ✓ ...

Within TRIM we talk about products and services. Normally we say that a service is produced and consumed at the same time whereas a product can be produced and stored until the day someone consumes it. We can build a computer and put it in our warehouse but we cannot produce a bus ride and wait – the transportation service is here and now.

We will also have constant conditions and specific demands when we build a product whereas a service is continuously delivered under different conditions and changing demands.

With a product, we can measure quality quite simple – cost, speed or anything else that we will define but the value of a service is much harder to define. The basic fact is that the value of a service is defined by the customer and it doesn't really matter what we as a service provider think.

Also, when we build our product we will use parts that different suppliers have delivered to us. When a service is produced – all involved suppliers needs to deliver their specific part instantly and at the same time as everybody else – otherwise that service will be affected.

# Delivering IT is a team sport

Introduction



A service provider is like a sports team:

- ✓ Everyone has different roles in the same delivery
- ✓ You will only get so far with individual skills
- ✓ Everyone needs to know the fundamentals of the game
- ✓ You need to communicate
- ✓ You have the resources, develop the capabilities
- ✓ You need a common and well understood game plan
- ✓ Everything is built on roles and responsibilities in a common structure

Let's look at delivering IT as a team sport, in this case a soccer team. A service provider is delivering services to internal or external customers and to do this in an effective and efficient way the different parts need to cooperate. Different parts of the service provider have different roles just like the different parts of a soccer team. Not everyone can score goals and even if those players get the most attention in the papers and the sports news they would not be able to score unless other parts of the team did their job properly.

In service delivery, it is not enough if the servers and applications are working properly if we fail to ensure other parts such as network access or the ability to authorize the user for them to log on to the service and use it in their daily work.

It is important to understand that different parts of the service provider have different roles but they all participate in delivering the service. Individual skills are important but if the different parts or people can act as a team with a common goal it is of little use. Everyone involved in the service delivery also need to understand their part and how they contribute to the service and for that reason we need to communicate between the different parts as the delivery most certainly have several hand-overs where communication is vital.

Just like playing soccer we need to have a common clear understanding of what we are about to achieve. In soccer, we call it "game-plan" and in service delivery we might call it strategic plan or service plans but it is basically the same idea behind – for all involved to understand and to work together towards a common goal.

In TRIM, we don't work as individuals – we are part of a team and the players in that team act in roles. Each role should have clear responsibilities and know what to do in different situations and what result we are all aiming for together – creating value to the business.

Introduction

# The Rational IT Model

- ✓ A reference model for Service Management
- ✓ Starts from the existing organization
- ✓ Define your "team" in functions with purpose and responsibility
- ✓ Activities in the form of processes will come naturally
  
- ✓ [www.opentrim.org](http://www.opentrim.org)
  - The complete model
  - Community
  - Templates
  - Support

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The Rational IT Model™ (TRIM) is a reference model for your IT service delivery. It is based on ITIL® but we have simplified and scaled it down to a level that all organizations can handle and understand. The model includes all the processes, roles, templates and procedures that you need to implement IT Service Management in your company and to ensure that you will provide a working and efficient production of IT services that provide what we are all aiming for - value to the business.

The model takes its starting point in the existing organization, from there we need to start building our team, defining the functions involved in the delivery of services. As the players in a sports team, the functions have different purposes, and the people connected to that function, has the responsibility to fulfill that purpose.

When all of this is in place, and understood by the organization, we can add processes to effectively control the activities needed to carry out the responsibility. In this way, all processes will be linked to the organization through responsibility, purpose and functions.

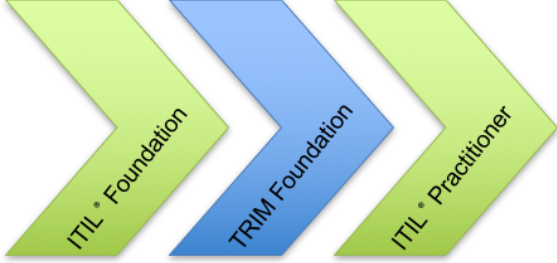
If we would start by defining and trying to implement a process, we risk ending up with a process that is poorly understood in the organization and we would have a hard time convincing everyone that they should use it. But when building this from the bottom-up. The process will only be a help to carry out the activities they realize the need to do anyway to fulfill their responsibility.

On the community [opentrim.org](http://opentrim.org) you will find information about the model and all the material you need such as templates and you will also get access to the TRIM-community forums and groups.

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## In relation to ITIL®

Introduction



- ✓ ITIL® Foundation – The what
  - Overview and the “IT language”
- ✓ TRIM Foundation – The how
  - Reference model
- ✓ ITIL® Practitioner – The way
  - Manage the change

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TRIM foundation is positioned as the practical continuation of ITIL® foundation. ITIL® Foundation will give you the overall understanding of ITIL® and how it works. There you will get the basic concepts of IT Service Management and how ITIL® can be useful to plan, design, build, test and deliver well designed services to our customers.

The TRIM Foundation is aiming to give you the tools you need and the understanding of how it can be used within your organization and provide the reference model you need.

The Continual Improvement part of this course is built on the book ITIL® practitioner guidance. Student that wants to get deeper knowledge on the subject is recommended to take the ITIL® Practitioner course.

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## KEY CONCEPTS OF SERVICE MANAGEMENT



## Key concepts of Service Management


# Service and Service provider

Key concepts  
ITIL® PG 1.2.1

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

**Mission:**  
Making it easy for the customer

A **service provider** is an organization supplying services to one or more internal customers or external customers.

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Ref: ITIL® PG 1.2.1

According to ITIL® the definition of a service is “a means of delivering value to customers by facilitating outcomes that customers want to achieve without the ownership of specific costs and risks” but what does that mean? Well look at a service we all have been using sometime – Transportation. The outcome I am after is that I want to be transported from A to B and for me to see that value in the service I want it to be on time, reasonably comfortable, safe and so on. I don’t want to take the ownership of specific costs and risks so I buy a ticket and it doesn’t matter if I am the only passenger on the bus – I still only pay the price of the ticket. If the bus breaks down and needs repair – it doesn’t matter for me as I am buying a service and it is up to the service provider to calculate the risks and decide the price of the service.

A service provider is an organization supplying services to one or more internal or external customers.

A service is basically about enabling a customer to get, do or have something that they want, without the customer needing to own and manage the individual elements necessary to obtain what they desire. Achieving their desired outcomes should be easy for the customer. Making it easy for the customer is the overall mission of the service provider.


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# Customer

Key concepts  
ITIL® PG 1.2.2

A **customer** is someone who buys goods or services. The customer of an IT service provider is the person or group who defines and agrees the service level targets.

- ✓ Internal/External service provider model
- ✓ Value network

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Ref: ITIL® PG 1.2.2

ITIL® makes a difference between customer and users where the customer is someone who buys goods or services – the one that is signing the agreement with us as a service provider and deciding what should be included and the level of service.

Ultimately, the customers of the business itself are the ones who must receive value. The business does not receive revenue or other benefit from their customers unless those customers receive value from the business.

In this internal service provider model, from the perspective of the IT department, some IT services may be utilized directly by external customers, making it easy to identify the contribution of these services to value creation for the external customer. But many IT services directly benefit only internal IT customers, in which case, the contribution of these services to value creation for external customers may be more difficult to trace. Understanding the value network is important to understand who is receiving value in different situations.

A value network is a complex set of relationships between two or more groups or organizations.

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# Value

Key concepts

ITIL® PG 1.2.3

The benefits delivered in proportion to the resources put into acquiring them.

The **value** of a service comes from what it enables someone to do. Services contribute value to an organization only when their value is perceived to be higher than the cost of obtaining the service

- ✓ What service will be provided to the customer?
- ✓ What will the customer be able to achieve through the use of the service?
- ✓ How much will the service cost the customer?

Ref: ITIL® PG 1.2.3

We aim to deliver value to our customers but what is value – what does it mean?

First, we need to realize that the service itself doesn't really deliver the value – the value comes from what it enables someone to do or achieve by using the service. But this is not enough. Even if we can achieve everything we want by using the service we still need to feel that it is worth the money or as we can say – it is cost-efficient. This means that a service is bringing value if the result is higher than the cost for obtaining the service

In the definition of value, the 'someone' referred to is the customer. Putting this together leads us to the following three questions when considering the value of a service:

- What service will be provided to the customer?
- What will the customer be able to achieve using the service?
- How much will the service cost the customer?

For planning purposes, the questions are posed in the future tense – will be. For historical analysis, the questions should be posed in the past tense – were, did - Because services must deliver value to customers, and don't forget that it is only the customer that can decide whether they receive value from a service.

# Outcome vs Output

Key concepts

ITIL® PG 1.2.4

An **outcome** is the result of carrying out an activity, following a process, or delivering an IT service etc. The term is used to refer to intended results as well as actual results.

An **output** is a specialist product (the tangible or intangible artefact) that is produced, constructed or created as a result of a planned activity and handed over to a user(s).

Ref: ITIL® PG 1.2.4

Sometimes we use different words but we might mean the same thing. How many of you have heard people talk about strategic planning when it is operational or tactical planning they should talk about. Outcome and output might be words you have heard as well but what is the difference between these two

Outcomes are different from mere outputs. One output of a wedding organizing service may be completed contracts with wedding suppliers, but the outcome the customer expects is a wedding that fulfils the dreams of the bride and the groom while staying within their budget and on schedule. A change management process may produce an output of reports or metrics, but those are not the outcomes desired by the customer. The customer expects sound change management to deliver to them the ability to benefit from appropriate changes while still experiencing stable services with minimal unplanned interruptions.

If a service provider focuses on outputs only and either neglects or fails to understand the customer's desired outcomes, the service provided may not be delivering value to the customer.


# Costs

Key concepts  
ITIL® PG 1.2.5

Making things easier for the customer

A **cost** is the amount of money spent on a specific activity, IT service or business unit. Costs consist of real cost (money), notional cost (e.g. people's time) and depreciation.

- ✓ **Overall price** - The customer wants to know how much it will cost them to achieve the outcomes they desire (and they are willing to pay for).
- ✓ **Individual costs** - The materials, time, work, etc. necessary to deliver the service – and therefore the outcomes – are not free; there is a cost to each.

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Ref: ITIL® PG 1.2.5

If the customer had to do all the work associated with achieving their desired outcomes by themselves, without the assistance of a service provider, they would need to be concerned with each of the individual costs. We remember from the definition of a service that the customer doesn't want to take ownership of specific costs or risks. If so - The customer would have to investigate all the possibilities and cost them out, create and maintain relationships with the providers of the required service components, obtain the components at the right price, and so on. That is a great deal of work and this is the main reason why we prefer to buy more and more as a service instead of doing it ourselves. Another reason might be that the customer may not have the expertise in many of the individual areas involved, so the process may result in many costly mistakes and in the end, it might be more expensive.

This brings us back to the nature of a service and how a service makes things easier for the customer. In a service provider/customer relationship, the service provider takes over the responsibility for all or most of the individual costs, presenting an overall cost or service price to the customer for their consideration. Without the burden of concerning themselves with every detail, the customer is then free to decide if the outcomes associated with the service are worth the price of achieving them. If the customer thinks it is worth the money, then they will feel they are receiving the desired value.

**Risk**

Key concepts  
ITIL® PG 1.2.6

Making things easier for the customer

A **risk** is a possible event that could cause harm or loss, or affect the ability to achieve objectives (see glossary for a full definition).

The customer contributes to the reduction of risk through activities such as:

- ✓ actively participating in the definition of requirements and the clarification of required outcomes
- ✓ clearly communicating to the service provider the critical success factors (CSFs) and constraints the customer believes apply to the activity/service
- ✓ ensuring the service provider has access to the appropriate customer staff to maintain alignment throughout the initiative and ongoing service delivery

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Ref: ITIL® PG 1.2.6

The definition of risk is a possible event that could cause harm or loss or affect the ability to achieve the objectives.

As with costs, if the customer did not engage a service provider, the customer would have to take direct responsibility for all the individual risks associated with creating the service and achieving their outcomes. What if one of the suppliers does not deliver on time? What if the first build does not work? What if the user interface is too difficult to use? What if the real costs are significantly higher than the amount budgeted for?

Once again, in a service provider/customer relationship, the service provider takes over the responsibilities for the risks at the detailed level, leaving primarily the broad scope risks for the customer. The service provider makes it their business to manage the detailed level of risk on behalf of the customer, based on what matters most to that customer. The customer contributes to the reduction of risk through activities such as:

- actively participating in the definition of requirements and the clarification of required outcomes
- Or clearly communicating to the service provider the critical success factors or the CSFs as we call them and the constraints the customer believes apply to the activity/service
- Or even ensuring the service provider has access to the appropriate customer staff to maintain alignment throughout the initiative and ongoing service delivery.

## Putting it all together

Key concepts

ITIL® PG 1.2.7

- ✓ **Value** - How will the service, process, partner, etc. help to deliver value to the customer?
- ✓ **Outcomes** - What are the specific outcomes required by the customer that the service will facilitate?
- ✓ **Costs** - What are the true and complete costs associated with achieving the outcomes?
- ✓ **Risk** - What are the risks that, if they materialize, could endanger the achievement of the outcomes?

For each situation, consider the four components of the definition of a service

Ref: ITIL® PG 1.2.7

Value was achieved when the service enables the customer to reach their goals and the customer finds the service cost-effective. Outcomes was the overall goals we want to achieve like fulfilling our dreams or maybe more specific our strategic goals. Costs are all the different parts that sum up into the complete cost and these costs together will be used to achieve the outcomes and finally the risks that are things that might hinder us to reach our goals or cause harm or loss

ITSM professionals need to keep the definition of a service and the components of that definition clearly in mind as they work to adopt a service-oriented approach in their work and to improve both efficiency and effectiveness. Clearly identify who the customer is. Then, for each situation, consider the four components of the definition of a service.