

COURSEWARE

# SIAM™ PROFESSIONAL COURSEWARE



Helen Morris and Liz Gallacher

Service Integration And Management (SIAM)  
Professional

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Authors: Helen Morris & Liz Gallacher  
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## About the Courseware

The Courseware was created by experts from the industry who served as the author(s) for this publication. The input for the material was based on existing publications and the experience and expertise of the author(s). The material has been revised by trainers who also have experience working with the material. Close attention was also paid to the key learning points to ensure what needs to be mastered.

The objective of the courseware is to provide maximum support to the trainer and to the student, during his or her training. The material has a modular structure and according to the author(s) has the highest success rate should the student opt for examination. For this reason, the Courseware has also been accredited, wherever applicable.

In order to satisfy the requirements for accreditation the material must meet certain quality standards. The structure, the use of certain terms, diagrams and references are all part of this accreditation. Additionally, the material must be made available to each student in order to obtain full accreditation. To optimally support the trainer and the participant of the training assignments, practice exams and results have been provided with the material.

Direct reference to advised literature is also regularly covered in the sheets so that students can easily find additional information concerning a particular topic. The decision to separate note pages (handouts) from the Courseware was to encourage students to take notes throughout the material.

Although the courseware is complete, the possibility that the trainer may deviate from the structure of the sheets or chooses to not refer to all the sheets or commands does exist. The student always has the possibility to cover these topics and go through them on their own time. It is strongly recommended to follow the structure of the courseware and publications for maximum exam preparation.

The courseware and the recommended literature are the perfect combination to learn and understand the theory.

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## Timetable

<b>Day 1</b>	
09:00 - 9:30	Introduction, About this course
09:30 - 10:15	Module 1: 1 D&S - Elements of a SIAM governance framework
10:15 - 10:30	Break
10:30 - 11:15	Module 1: 1 D&S - Elements of a SIAM governance framework continued
11:15 - 12:30	Module 1: 2 D&S - Current situation analysis
12:30 - 13:00	Lunch
13:00 - 13:45	Module 1: 2 D&S - Current situation analysis continued
13:45 - 15:30	Module 1: 3 D&S - Key elements of a SIAM strategy
15:30 - 15:45	Break
15:45 - 17:00	Module 1: 3 D&S - Key elements of a SIAM strategy continued

<b>Day 2</b>	
09:00 - 10:30	Module 2: 1 P&B - Designing a detailed Siam model
10:30- 10:45	Break
10:45- 12:45	Module 2: 1 P&B - Designing a detailed Siam model - continued
12:45 - 13:15	Lunch
13:15 - 13:55	Module 2: 1 P&B - Designing a detailed Siam model - continued
13:55 - 15:15	Module 2: 2 P&B - Planning a Siam implementation
15:15- 15:30	Break
15:30-16:10	Module 2: 2 P&B - Planning a Siam implementation - continued
16:10 - 17:00	Module 3: 1 Implement - SIAM scenarios

	<b>Day 3</b>
09:00 - 09:30	Module 3: 1 Implement - SIAM scenarios - continued
09:30 - 10:30	Module 3: 2 Implement - Organizational Change Management
10:30 - 10:45	Break
10:45 - 12:30	Module 4: 1 R&I - Operate, assure, improve a SIAM Ecosystem
12:30 - 13:00	Lunch
13:00 - 13:50	Module 4: 1 R&I - Operate, assure, improve a SIAM Ecosystem - Continued
13:50 - 15:20	Module 5: 1 SIAM Practices - Applying SIAM practices
15:20 - 15:35	Break
15:35 - 16:05	Module 5: 1 SIAM Practices - Applying SIAM practices - continued
16:05 - 16:30	Revision
16:30 - 17:30	Exam

## Self-Reflection of understanding Diagram

*‘What you do not measure, you cannot control.’ – Tom Peters*

Fill in this diagram to self-evaluate your understanding of the material. This is an evaluation of how well you know the material and how well you understand it. In order to pass the exam successfully you should be aiming to reach the higher end of Level 3. If you really want to become a pro, then you should be aiming for Level 4. Your overall level of understanding will naturally follow the learning curve. So, it’s important to keep track of where you are at each point of the training and address any areas of difficulty.

Based on where you are within the Self-Reflection of Understanding diagram you can evaluate the progress of your own training.

<i>Level of Understanding</i>	<i>Before Training (Pre-knowledge)</i>	<i>Training Part 1 (1st Half)</i>	<i>Training Part 2 (2nd Half)</i>	<i>After studying / reading the book</i>	<i>After exercises and the Practice exam</i>
<i>Level 4 I can explain the content and apply it .</i>					
<i>Level 3 I get it! I am right where I am supposed to be.</i>					Ready for the exam!
<i>Level 2 I almost have it but could use more practice.</i>					
<i>Level 1 I am learning but don't quite get it yet.</i>					

(Self-Reflection of Understanding Diagram)



Write down the problem areas that you are still having difficulty with so that you can consolidate them yourself, or with your trainer. After you have had a look at these, then you should evaluate to see if you now have a better understanding of where you actually are on the learning curve.

**Troubleshooting**

*Problem areas:*

*Topic:*

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Part 1

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Part 2

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You have gone through the book and studied.

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You have answered the questions and done the practice exam.

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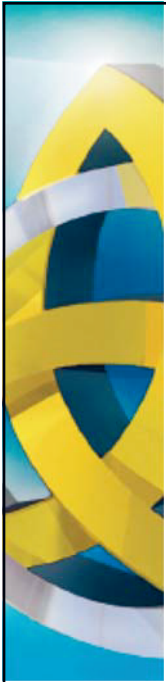
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## Service Integration And Management (SIAM) Professional



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## Introduction

- Let's meet & goals
- Terms
- Program



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## ABOUT THIS COURSE

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## Exam Specification

Exam requirement	Exam specification	Weight %
<b>1. Discovery and Strategy</b>		
	1.1 The candidate can design the elements of a SIAM governance framework.	7.5%
	1.2 The candidate can analyze the current situation.	10%
	1.3 The candidate can define key elements of a SIAM strategy.	15%
<b>2. Plan and Build</b>		
	2.1 The candidate can design a detailed SIAM model.	20%
	2.2 The candidate can plan for a SIAM implementation.	10%
<b>3. Implement</b>		
	3.1 The candidate can illustrate how different scenarios can support a SIAM implementation.	10%
	3.2 The candidate can apply ongoing organizational change management.	5%
<b>4. Run and Improve</b>		
	4.1 The candidate can operate, assure and improve a SIAM ecosystem.	12.5%
<b>5. SIAM practices across the stages</b>		
	5.1 The candidate can apply SIAM practices.	10%
<b>Total</b>		<b>100%</b>



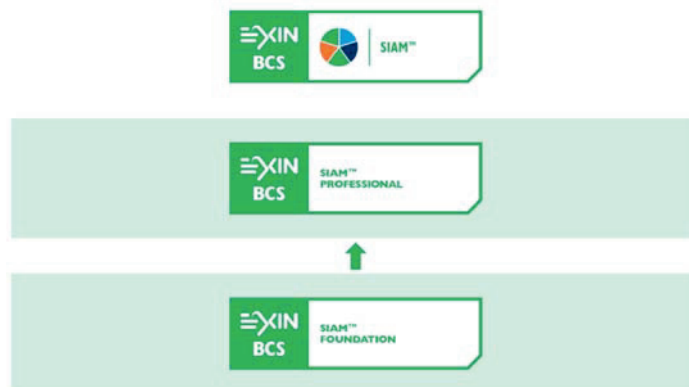
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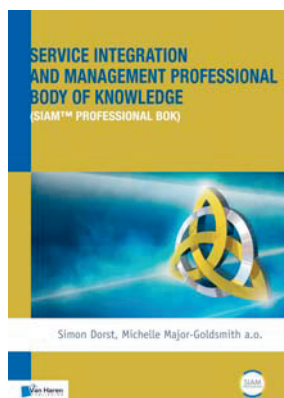
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# Timetable

Day 1		Day 2		Day 3	
09:00 - 9:30	Introduction, About this course	09:00 - 10:30	Module 2: 1 P&B - Designing a detailed Siam model	09:00 - 09:30	Module 3: 1 Implement - SIAM scenarios - continued
09:30 - 10:15	Module 1: 1 D&S - Elements of a SIAM governance framework	10:30 - 10:45	Break	09:30 - 10:30	Module 3: 2 Implement - Organizational Change Management
10:15 - 10:30	Break	10:45 - 12:45	Module 2: 1 P&B - Designing a detailed Siam model - continued	10:30 - 10:45	Break
10:30 - 11:15	Module 1: 1 D&S - Elements of a SIAM governance framework continued	12:45 - 13:15	Lunch	10:45 - 12:30	Module 4: 1 R&I - Operate, assure, improve a SIAM Ecosystem
11:15 - 12:30	Module 1: 2 D&S - Current situation analysis	13:15 - 13:55	Module 2: 1 P&B - Designing a detailed Siam model - continued	12:30 - 13:00	Lunch
12:30 - 13:00	Lunch	13:55 - 15:15	Module 2: 2 P&B - Planning a Siam implementation	13:00 - 13:50	Module 4: 1 R&I - Operate, assure, improve a SIAM Ecosystem - Continued
13:00 - 13:45	Module 1: 2 D&S - Current situation analysis continued	15:15 - 15:30	Break	13:50 - 15:20	Module 5: 1 SIAM Practices - Applying SIAM practices
13:45 - 15:30	Module 1: 3 D&S - Key elements of a SIAM strategy	15:30 - 16:10	Module 2: 2 P&B - Planning a Siam implementation - continued	15:20 - 15:35	Break
15:30 - 15:45	Break	16:10 - 17:00	Module 3: 1 Implement - SIAM scenarios	15:35 - 16:05	Module 5: 1 SIAM Practices - Applying SIAM practices - continued
15:45 - 17:00	Module 1: 3 D&S - Key elements of a SIAM strategy continued			16:05 - 16:30	Revision
				16:30 - 17:30	Exam

# Overview EXIN BCS SIAM™ Professional





Reference to book

## Literature

- A *Simon Dorst, Michelle Major-Goldsmith and others*  
*Service Integration and Management (SIAM™) Professional Body of Knowledge*  
*Van Haren Publishing: 2017*  
*ISBN-13: 978-9401802994*
- B *The exam will be based on a Case Study.*  
Added to **this material appendix**
- C *Service Integration and Management Foundation Body of Knowledge (SIAM® Foundation BoK).*  
*Van Haren Publishing: March 2017 (first edition)*  
*ISBN-13: 978-9401801027*

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## Course Scope

- The EXIN BCS SIAM™ Professional certification tests a candidate's knowledge of the application of SIAM™ to situations and the candidate's ability to further analyze the SIAM concepts.
- This certification includes the following topics:
  - The Discovery and Strategy stage;
  - The Plan and Build stage;
  - The Implement stage;
  - The Run and Improve stage;
  - SIAM practices across the stages.
- A candidate who successfully completes the EXIN BCS SIAM™ Professional can analyze, plan, build and inspect a multi-service provider environment.

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# Exam specifications

## 1. Discovery and Strategy (32.5%)

### 1.1 The candidate can design the elements of a SIAM governance framework. (7.5%)

The candidate can...

- 1.1.1 Interpret the characteristics of governance in a SIAM ecosystem.
- 1.1.2 Differentiate SIAM governance roles.
- 1.1.3 Choose governance approaches for monitoring and measuring service performance.

### 1.2 The candidate can analyze the current situation. (10%)

The candidate can...

- 1.2.1 Analyze existing services, service groupings, service providers and the market place.
- 1.2.2 Explain how to assess current capability.
- 1.2.3 Classify the influences for deciding on the SIAM model and sourcing approach.

### 1.3 The candidate can define key elements of a SIAM strategy. (15%)

The candidate can...

- 1.3.1 Interpret strategic drivers for SIAM.
- 1.3.2 Differentiate critical success factors for SIAM.
- 1.3.3 Interpret the principles and policies for roles and responsibilities.
- 1.3.4 Select an appropriate SIAM strategy.
- 1.3.5 Illustrate how to gain and maintain buy-in to a SIAM strategy.
- 1.3.6 Describe the content of the business case and the transition project for SIAM.

## 2. Plan and Build (30%)

### 2.1 The candidate can design a detailed SIAM model. (20%)

- 2.1.1 Analyze organization specific service models and process models.
- 2.1.2 Select an appropriate sourcing approach and SIAM structure.
- 2.1.3 Describe detailed roles and responsibilities.
- 2.1.4 Select a performance measurement and reporting framework.
- 2.1.5 Select a collaboration model.
- 2.1.6 Analyze contract considerations for SIAM.

### 2.2 The candidate can plan for a SIAM implementation. (10%)

The candidate can...

- 2.2.1 Describe the challenges for organizational change. Differentiate between approaches for onboarding of services and service providers.
- 2.2.2 Analyze the most appropriate tooling strategy and integration methods for a SIAM ecosystem.
- 2.2.3



# Exam specifications

## 3. Implement (15%)

### 3.1 The candidate can illustrate how different scenarios can support a SIAM implementation. (10%)

The candidate can...

- 3.1.1 Choose between the big bang approach, and a phased approach based on the benefits and risks of these approaches.
- 3.1.2 Explain how to transition to the approved SIAM model.

### 3.2 The candidate can apply ongoing organizational change management. (5%)

The candidate can...

- 3.2.1 Choose ways to influence morale and motivation.

## 4. Run and Improve (12.5%)

### 4.1 The candidate can operate, assure and improve a SIAM ecosystem. (12.5%)

The candidate can...

- 4.1.1 Analyze structural elements at different levels.
- 4.1.2 Select appropriate mechanisms to address issues and improve provider and integrator performance.
- 4.1.3 Apply audit and compliance mechanisms.

## 5. SIAM practices across the stages (10%)

### 5.1 The candidate can apply SIAM practices. (10%)

The candidate can...

- 5.1.1 Apply all SIAM practices for the Discovery & Strategy stage.
- 5.1.2 Apply all SIAM practices for the Plan & Build stage.
- 5.1.3 Apply all SIAM practices for the Implementation stage.
- 5.1.4 Apply all SIAM practices for the Run & Improve stage.



## Basic concepts

A list of basic (exam) concepts can be found in:

EXIN BCS SIAM® Professional Preparation Guide and is included with these materials

**Note:**

Knowledge of these terms alone does not suffice for the exam; the candidate must understand the concepts and be able to provide examples.

## Examination type

<b>Examination type</b>	<b>: multiple-choice questions Computer-based or paper-based</b>
<b>Number of questions</b>	<b>: 40</b>
<b>Pass mark</b>	<b>: 65% (26 of 40)</b>
<b>Open book/notes</b>	<b>: No</b>
<b>Electronic equipment/aides permitted</b>	<b>: No</b>
<b>Time allotted for examination</b>	<b>: 90 minutes</b>



**The Rules and Regulations for EXIN/BCS examinations apply to this exam.**

Good Luck!



## 1. DISCOVERY AND STRATEGY





## 1.1 DESIGN THE ELEMENTS OF A SIAM GOVERNANCE FRAMEWORK.

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### 1.1.1 Interpret the characteristics of governance in a SIAM ecosystem

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## What is Governance?

- Rules, policies, processes (and in some cases, legislation) by which businesses are operated, regulated and controlled.
- Layers of governance within a business
  - Enterprise
  - Corporate
  - IT
- In a SIAM ecosystem, governance refers to the definition and application of:
  - Policies and standards across the SIAM layers.
  - The required levels of authority, decision making and accountability.

## IT Governance

- Effective IT governance addresses the challenges of IT provision:
  - IT is a key capability, critical for business success
  - Significant impact to business if IT fails
  - Complex and varied IT solutions
  - Legislative and regulatory requirements for controls around IT provision
- The customer organization needs a well-defined and robust approach to IT governance
  - Internally and externally sourced services.
- Customer organization retains accountability for governance

## Governance in a SIAM ecosystem

- Consequences of poor governance can include:
  - Inappropriate and sub-optimal allocation of contracts
  - Breakdown of trust and relationships
  - Lack of coordination when dealing with major incidents, problems and changes
  - Charging based on 'what can be got away with'
  - Delays due to poor communication and poor sharing of information
  - Disputes related to unclear roles and responsibilities.
- Governance and management has three layers:
  - Strategic
  - Tactical
  - Operational

## Governance Practices

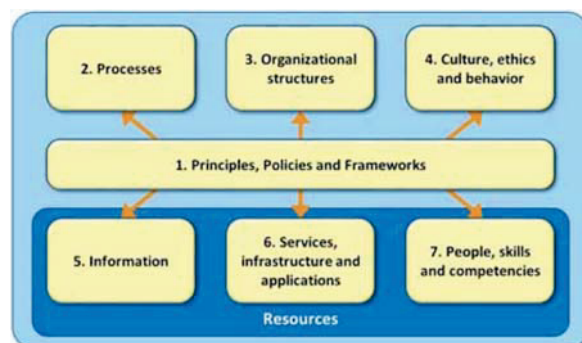
- Governance practices include:
  - Clear accountability
  - Fairness to all parties
  - Ethical practices
  - Openness and transparency
  - Procedures to prevent conflicts of interest

## Key Aspects of SIAM Governance

- At the highest level, SIAM governance focuses on three key aspects:
  - Ensuring alignment between the customer organization's current and future business needs and the SIAM strategy
  - Ensuring that the SIAM strategy and SIAM model are planned and implemented successfully
  - Ensuring that the SIAM model is managed, operated and improved in a controlled and collaborative manner, in compliance with both internal policies and external legislation.

## Governance Enablers

- Guidance on effective governance
  - ISACA's COBIT® 5 governance and management framework for information and related technology.
- COBIT's guiding principles for efficient and effective governance:
  - Holistic approach
  - Seven categories of enablers
  - Categories work together



Enterprise Enablers (ISACA COBIT® 5 Framework)

## Governance Requirements

- Understand governance requirements:
  - What needs to be governed (the 'assets').
  - Identify and assess the risks that apply to those assets.
  - Determining what controls need to be designed and implemented to manage those risks and provide assurance.
- Governance requirements can be identified as:
  - Strategic
  - Tactical
  - Operational

## Strategic Governance Requirements

- Strategic governance requirements (examples):
  - SIAM business case (outline and full) and subsequent benefits realization; strategy; model; process architecture; tools; organization
  - Strategic plans; risks and controls
  - Internal and external conformance; alignment to corporate requirements
- Potential risks requiring mitigation (examples):
  - Expected SIAM benefits not being realized; SIAM strategy and model failing to be wholly and properly implemented
  - One or more parties not fulfilling their organizational responsibilities
  - Unauthorized changes being made to strategic planning documents.
- Benefits tracking and realization