

Creating a BRM Maturity Assessment

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History

- EBRM role existed for several years
- Strategic, Tactical, Operational?
- Need for clarity of direction
- Lack of ITIL v3 Maturity Assessment tools

- How is BRM role structured in your organization?
 - Separate, defined role within IT organization
 - Responsibilities included within other roles
 - Just starting to try and define the role
 - Some other state (feel free to use Question button to provide specifics, if you wish)

- Who owns the BRM role in your organization?
 - Single person with BRM title
 - Several BRMs in a Team
 - BRM duties owned by someone with different title
 - BRM / SLM roles combined
 - Other (feel free to use Question button to provide specifics, if you wish)

Available Resources

- ITIL
 - Purpose / Scope / Critical Success Factors
- BCBSMN
 - Job summary / Responsibilities / Qualifications
- Industry
 - LinkedIN BRM discussion groups
 - Whitepapers / articles / practitioners



ITIL® Service Strategy

is not able to obtain or maximum, therefore difficult to commit to levels of service. This situation often results in higher than necessary levels of investment to enable the service provider to keep ahead of demand – even when not essential.

4.5 BUSINESS RELATIONSHIP MANAGEMENT

For many organizations, the role of the business relationship manager (BRM) was established to execute certain customer-facing activities in various processes, such as service level management. However, as the role matured it became clear that there was a discernible process to support that role.


Business relationship management is the process that enables BRMs to provide links between the service provider and customers at the strategic and tactical levels. The purpose of these links is to

The objectives of business relationship management include:

- Ensure that the service provider **understands the customer's perspective of service**, and is therefore able to **prioritize its services** and service assets appropriately
- Ensure high levels of customer satisfaction, indicating that the service provider is meeting the customer's requirements
- Establish and **maintain a constructive relationship** between the service provider and the customer based on understanding the customer and their business drivers
- Identify changes to the customer environment that could potentially impact the type, level or utilization of services provided
- Identify technology trends that could potentially impact the type, level or utilization of services provided
- **Establish and articulate business requirements** for new services or changes to existing services



Enterprise Business Relationship Manager Job Summary

EBRM provides central point of contact and communication between business and all IT teams. Primary purpose is to partner with the business and build a strong relationship to help achieve business goals through effective use of IT, enabling solutions that meet corporate goals and market commitments. Primarily responsibility for developing and maintaining a successful relationship between specific business units and IT. Will **analyze channel and operational needs** and issues, **create business case** for changes, & work with multiple contributors to implement changes. Serves as IT contact with business leadership and executives, accountable for **facilitating operational activities**  support of assigned business area. Ensures expectations are properly met, effectively communicates to IT leadership on business needs and assists business in planning initiatives to support projects.

Has primary responsibility for developing, negotiating, and maintaining Service Level Agreements and Operation Level Agreements, providing regular reporting and analysis to IT and business units on system performance and service disruptions.

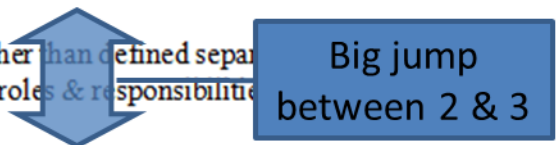
Creating the Assessment

- Create list of Actions / Responsibilities / Functions
- Review list as a team
 - Identify redundancies
 - Reword for consistency
 - Streamline for clarity
- Assign to broad categories of focus
 - Strategy
 - Relationship
 - Service Level Management
 - Intake
 - ITIL Lifecycle

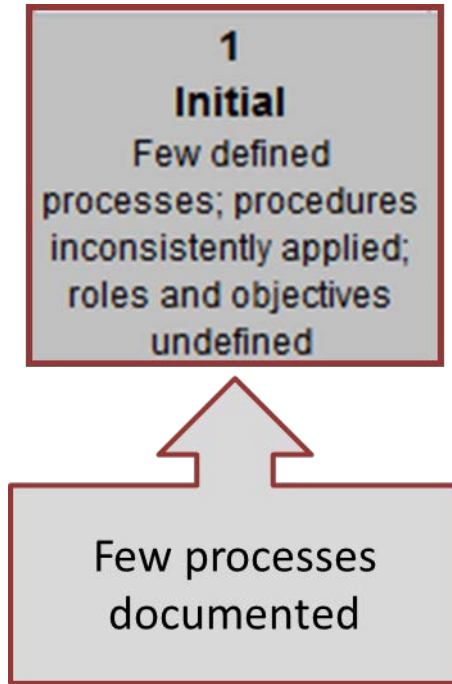
Maturity Levels

- Not satisfied with existing examples
 - Significant gaps between levels
 - Resulted in a lot of “# & ½” ratings

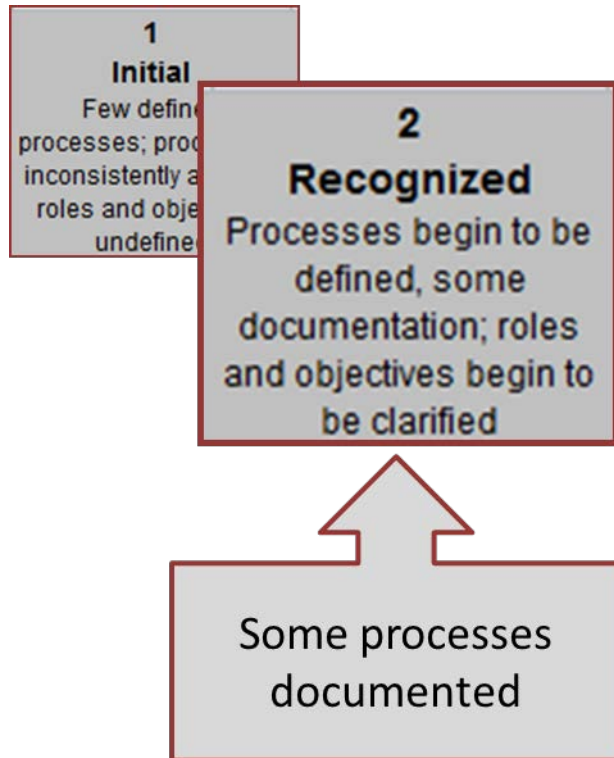
LEVEL MATURITY DESCRIPTION	
1	INITIATION <i>“There are ad-hoc activities present, but we are not aware of how they relate to each other within a single process”</i>
	<input type="checkbox"/> some policy statements have been made <input type="checkbox"/> words but no documented objectives or plans <input type="checkbox"/> no dedicated resources or real commitment
2	AWARENESS <i>“We are aware of the process but some activities are still incomplete or inconsistent; there is no overall measuring or control”</i>
	<input type="checkbox"/> process driven by tool rather than defined separately <input type="checkbox"/> positions are created, but roles & responsibilities are not defined
3	CONTROL <i>“The process is well defined, understood and implemented”</i>
	<input type="checkbox"/> tasks, responsibilities and authorizations are well defined and communicated <input type="checkbox"/> targets for quality are set and results are measured <input type="checkbox"/> comprehensive management reports are produced and discussed <input type="checkbox"/> formal planning is done

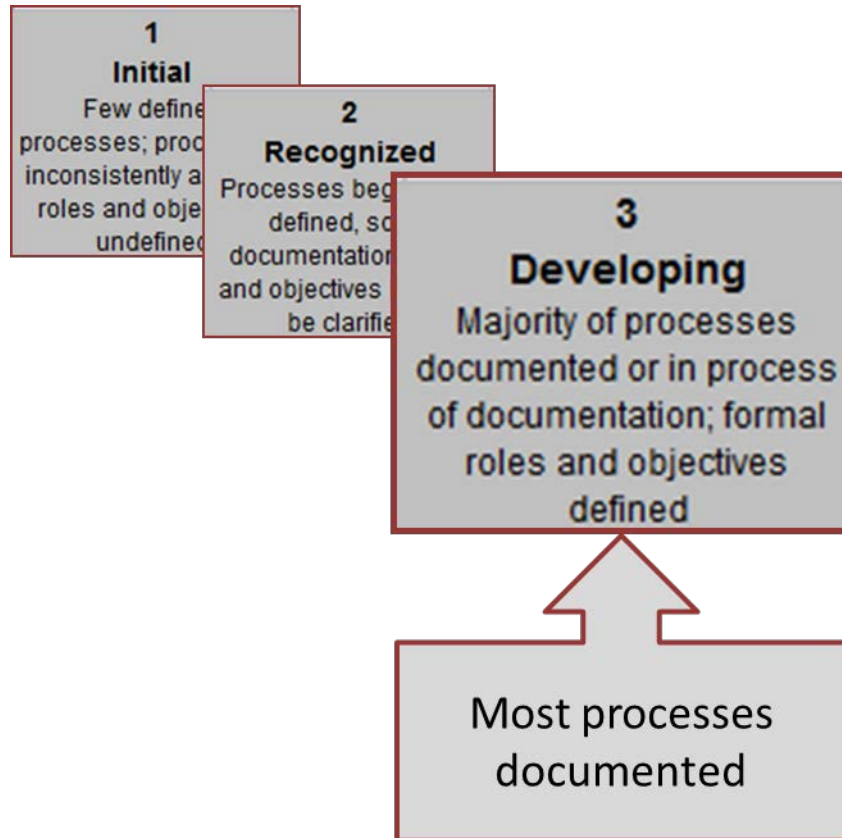


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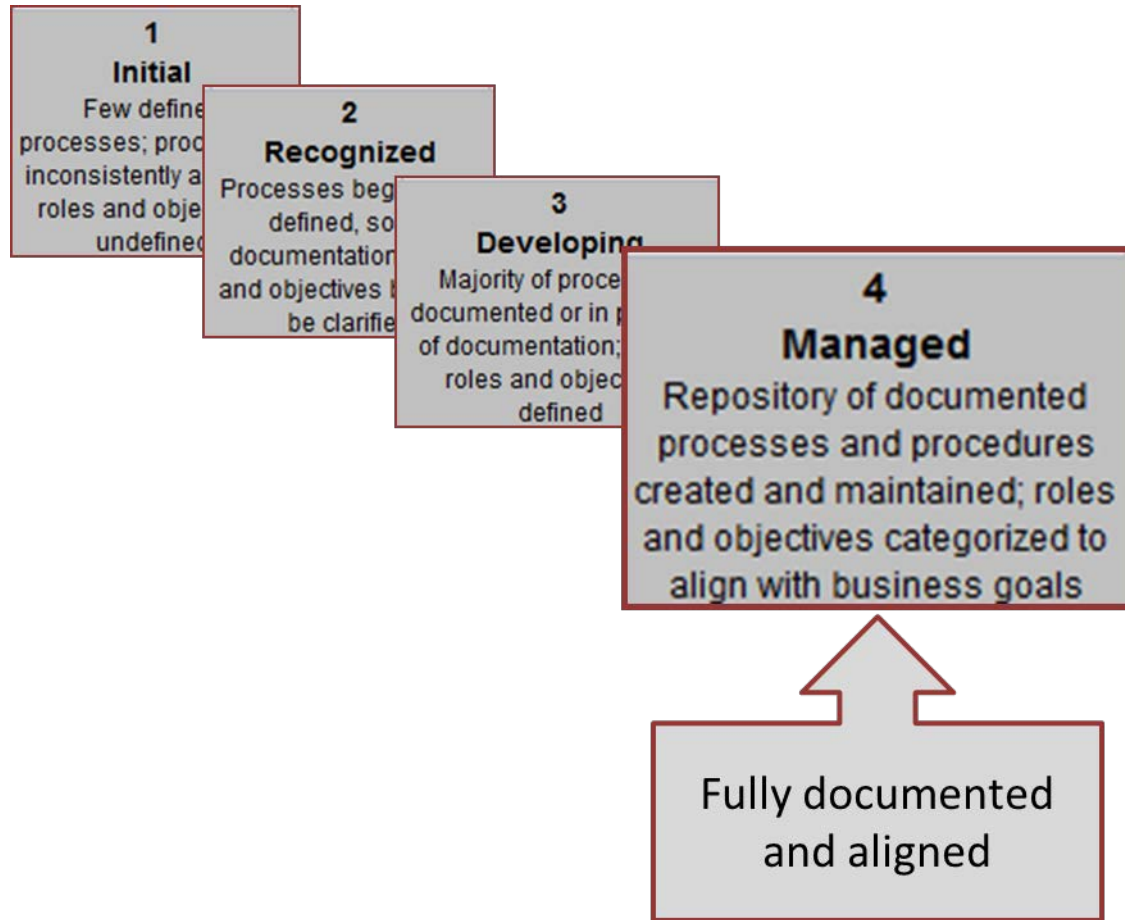


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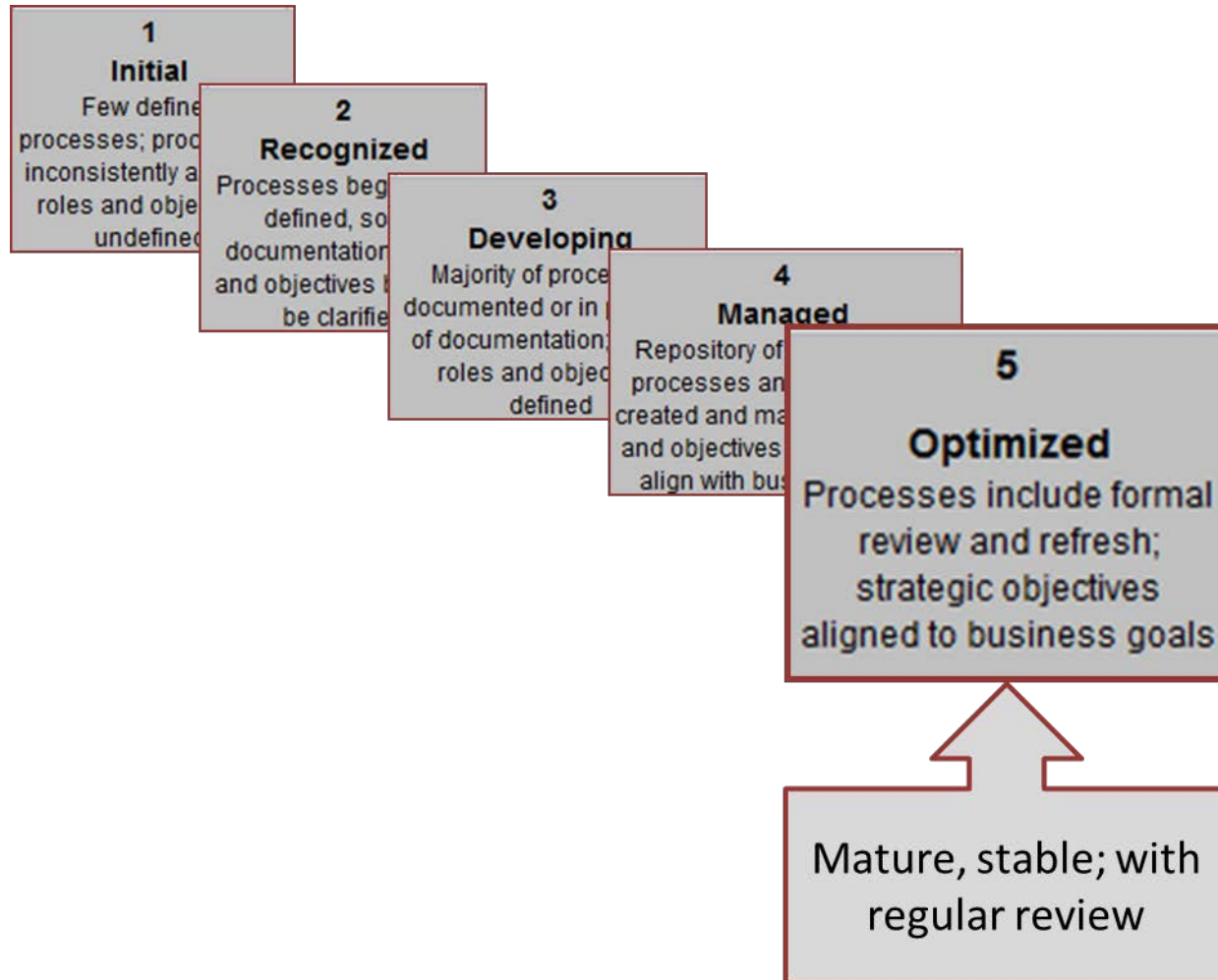




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Team Review

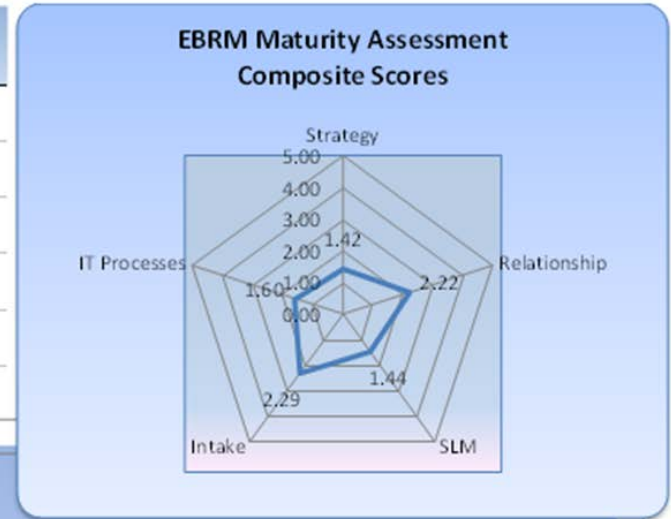
- Entire team reviewed all Items
- Assigned value to all items
 - Needed group consensus

Category	Actions	Score	1	2	3	4	5
			Initial Few defined processes; procedures inconsistently applied; roles and objectives undefined	Recognized Processes begin to be defined, some documentation; roles and objectives begin to be clarified	Developing Majority of processes documented or in process of documentation; formal roles and objectives defined	Managed Repository of documented processes and procedures created and maintained; roles and objectives categorized to align with business goals	Optimized Processes include formal review and refresh; strategic objectives aligned to business goals
Strategy	Conduct regular Business Review meetings to discuss IT performance	2	█				
Strategy	Evaluate IT project efforts against Business strategic plans	1	█				
Relationship	Act as primary point of contact for business partners	2	█				
Relationship	Communicate project progress in a consistent and formalized manner	3	█				
Relationship	Conduct regular customer satisfaction surveys / reviews	4	█				
Service Level Management	Develop, negotiate and maintain Service Level Agreement documentation	1	█				
Service Level Management	Identify and document criteria for Operation Level Agreements	2	█				
Intake	Coordinate Governance meetings to ensure IT efforts align to Business priorities	3	█				
Intake	Coordinate identification of candidates for inclusion in scheduled release cycles	3	█				
Intake	Facilitate submission of new business initiatives	2	█				
IT Processes	Support Change Management via education on Change schedules and processes	1	█				
IT Processes	Support compliance with Incident Management Escalation processes	2	█				

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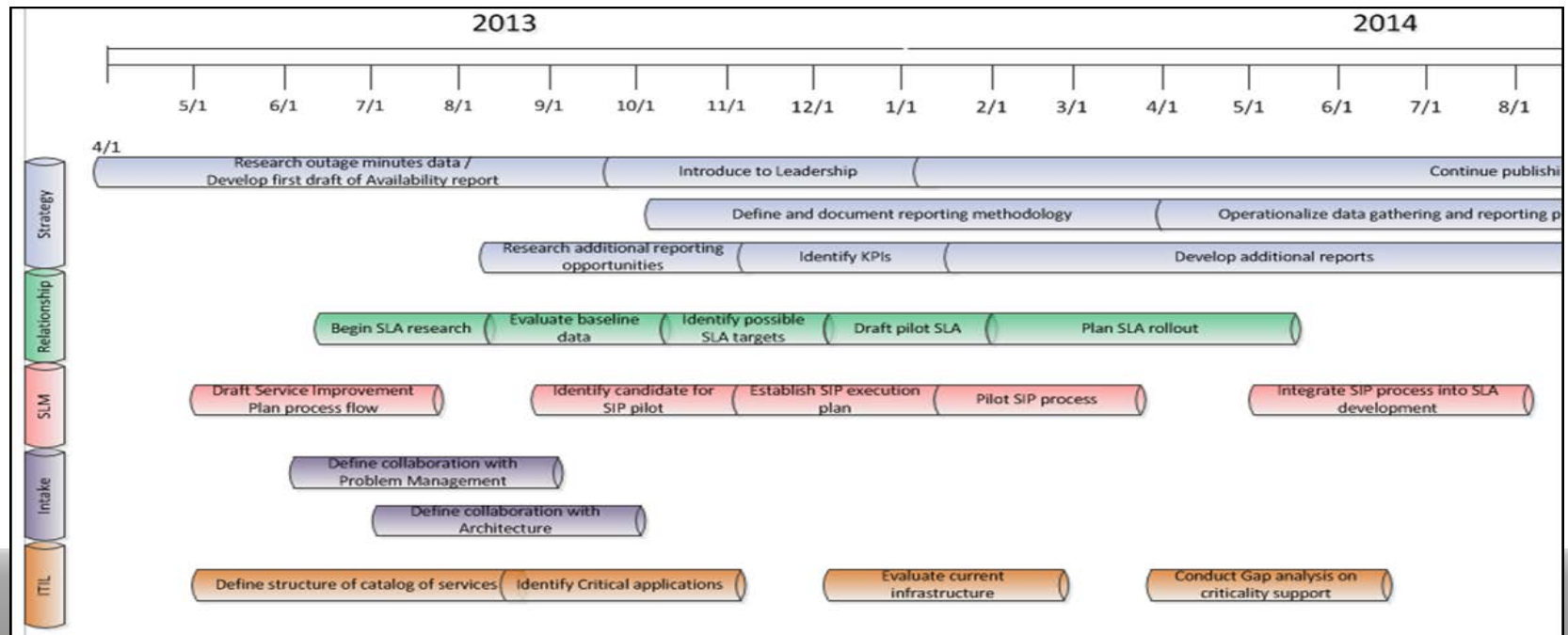
Graphical Reporting

Category	Composite Score
Strategy	1.42
Relationship	2.22
SLM	1.44
Intake	2.29
IT Processes	1.60



Roadmap

- Created multi-year Roadmap
 - Swimlane for each Assessment category
 - Created timeline for implementing key actions
 - Established milestones for significant achievements



Goal Setting

- Strategy Assessment Item: Conduct regular Business Review Meetings
 - CSR: Establish frequency, structure and agenda for Business Review Meetings
 - KPI – Establish meeting structure with [business contacts]
 - KPI – Develop performance reporting specific to each business unit
 - KPI – # Review Meetings scheduled with [business unit] by [date]

Goal Setting

- Relationship Assessment Item: Communicate project progress in consistent & formalized manner
 - CSF: Creation of standard project status report
 - KPI – Begin attend PMO status discussions by [date]
 - KPI – Develop status report template by [date]
 - KPI – Add Project Status Updates as agenda item within [Business Unit] Review Meetings by [date]

Momentum

- Conducting Maturity Assessment got us to establish our current level (where are we now?)
- Building Roadmap helped us identify a timeline for moving to higher levels of maturity (where do we want to be?)
- Linking Assessment & Roadmap to Team & Individual goals helped us keep focused on hitting milestones and making actual progress (how do we get there?)

Thanks for listening

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