

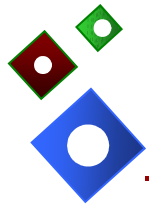
# A Practical Approach To Service Catalog Management

## Building the Service Catalog



Rae Ann Bruno

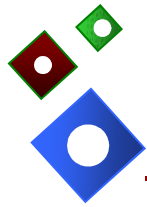
[rbruno@businesssolutionstraining.com](mailto:rbruno@businesssolutionstraining.com)



# Business Proposition

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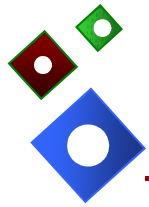
- ◆ You and I are going to open a restaurant in the Pittsburgh, PA area.
- ◆ We want to stand out among other restaurants, so we aren't going to have a menu. Customers can order anything they want!
- ◆ What are your concerns?
- ◆ What do your customers expect?



# Concerns

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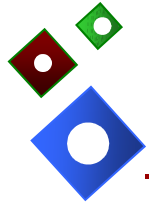
- ◆ May not have the right ingredients
- ◆ Expensive to keep or lose inventory
- ◆ Knowing how to make everything people order
- ◆ May not have the right equipment
- ◆ Don't know what to charge
- ◆ May take a long time to cook



# Customer Expectations

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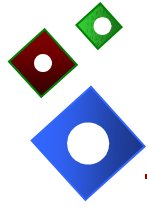
- ◆ Just the way they had it before
- ◆ In a realistic time frame – like at other restaurants
- ◆ Reasonable pricing



# Getting Back to I.T. ...

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What does running a restaurant have to do with IT services?



# Getting Back to I.T. ...

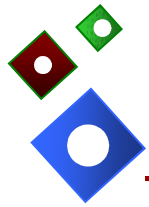
---

May not have the right equipment

May not have the expertise necessary

Need to design and develop it

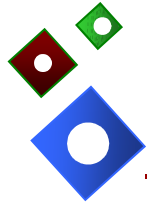
Customers expect to have everything - now and for free!



# Why a Service Catalog?

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- ◆ ***The Service Catalog supports the sale or delivery of services***
- ◆ Creating a Service Catalog goes beyond the catalog itself...
- ◆ Helps IT teams focus on ***Services*** versus ***Silos***
- ◆ Lays the groundwork for other processes such as Service Level Management and Request Fulfillment



# Why a Service Catalog?

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- ◆ Can lower the cost of delivering a service
- ◆ Supports processes such as Incident Management and Problem Management
- ◆ Frees Service Desk to handle more complex or business-critical issues
- ◆ Should be built into Project Methodology





# Success Factors

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- ◆ Clear goals – this drives how you start your efforts
- ◆ Executive Sponsorship – Accountability matters!
- ◆ Service Catalog Policy-High level plan
- ◆ Service Catalog Committee (representation from across IT) – ensures governance and continual improvement
- ◆ Understanding of roles and responsibilities (RACI)



# Success Factors

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- ◆ Strong Communication-always!
- ◆ Approval process-achieves quality and consistency.
- ◆ Templates-makes consistency easier!
- ◆ Understood value-by all stakeholders.
- ◆ Realistic timeline-proof of concept, phased approach.
- ◆ Continual Service Improvement efforts-in every aspect.

# Building the Service Catalog

## Plan

- Goals
- Define Services
- WIIFM?
- 4 P's
- Discovery
  - Evaluate
  - Requirements
- Approach

## Do

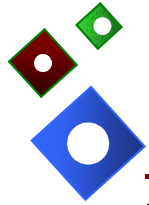
- Committee
- Develop Policy
- Develop templates
- Approval Process
- SC Entries
- Make Available

## Check

- Assess Feedback
- Trending
- Measure Results
- Measure usage
- Communicate Value

## Act

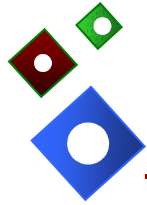
- CSI
- Update templates
- Tweak process
- Involve more people/groups
- Expand scope
- Add more functionality



# Service Catalog Committee

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- ◆ Establish a Service Catalog Committee first
  - ✧ Key to successful implementation of Service Catalog Management
- ◆ Upfront Tasks:
  - ✧ Identify Goals and overall plan
  - ✧ Define the Policy
  - ✧ Define Roles and RACIs
  - ✧ Provide Governance; makes decisions
  - ✧ Define Project scope, schedule
- ◆ Ongoing maintenance, guidance, decision making and continuous improvement



# Who is on the Committee?

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- ◆ The CIO should be a member with representation from across I.T.
  - ✧ If CIO can't attend meetings – should be update regularly or attended quarterly meetings
  
- ◆ Possible members:
  - ✧ Service Catalog Manager, the Change Manager, the Service Support Center Manager, appointed committee members and the Service Owner and Service Coordinator of the services under discussion



# Who is on the Committee?

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Committee involves other roles from within IT who have predefined roles and responsibilities related to service catalog work.

✧ Roles could include:

- ♦ Service Manager
- ♦ Service Owner
- ♦ Service Coordinator
- ♦ Subject Matter Expert
- ♦ Content Developer
- ♦ Non-technical Reviewer
- ♦ Technical Reviewer
- ♦ Service Catalog Manager

# Plan

## Goals

- What are we trying to achieve, change, improve, or eliminate (Short, Medium, and long term – become drivers)?
- What is the value to each stakeholder group? (WIIFM – e.g. save time, make it easier, more accurate, less expensive, offload routine requests from SD etc.)

## Define Services

- What is a Service? (will cover in next slides)
- Identify attributes, owners, dependencies, (details in handouts)
- What services will first appear in the catalog-phases? (based on your goals)

## Discovery

- Define functional and business requirements (based on goals).
- What do we already have? (explore all current documentation, sites, etc.)
- Evaluate public Service Catalogs, assess, decide. (list in handouts)

## Approach

- Where will we start? How many entries at first? (ties back to goals)
- Who is the audience? Who needs to be involved?
- What technology will we use? Who is doing what? (4 Ps)



# Defining Goals

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- ◆ It is essential to define goals up front; they drive all next steps.
- ◆ The steps in this session are important if your goal is to:
  - ✧ Lay the foundation for implementing ITIL processes
  - ✧ Ultimately fulfill requests and provide a level of self-help through the catalog
  - ✧ Include all IT services and even those outside of IT





# Defining Goals

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- ◆ If your goal is to “just get something out there” you can:
  - ✧ Take fewer steps; assign an owner, define scope of services, create a template, identify a tool, document and post! However, be realistic about the results. They will be limited and short term.
  - ✧ Accomplish this with the Service Desk alone (and maybe the Service Management tool).



# Laying the Groundwork: Defining a Service

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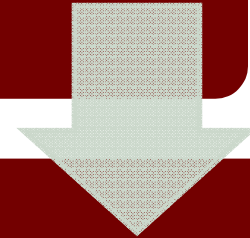
- A service:
  - Fulfills one or more needs of the customer
  - Supports the customer's business objectives
  - Is perceived by the customer as a coherent whole or consumable product

*“A good starting point is often to ask customers which IT services they use and how those services map onto and support their business processes.”* (Source ITIL v3 Service Design book)

# Defining a Service

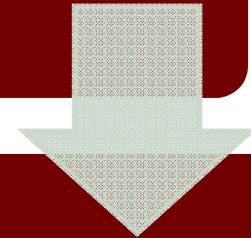
## Identify Services (group effort)

- Define Major business processes
- Define enabling IT services
- Map IT systems to IT Services
- Map IT components to IT systems



## Get more Detailed:

- Define Service Attributes (list in handouts)
- Create a Service Map (example on next slide)



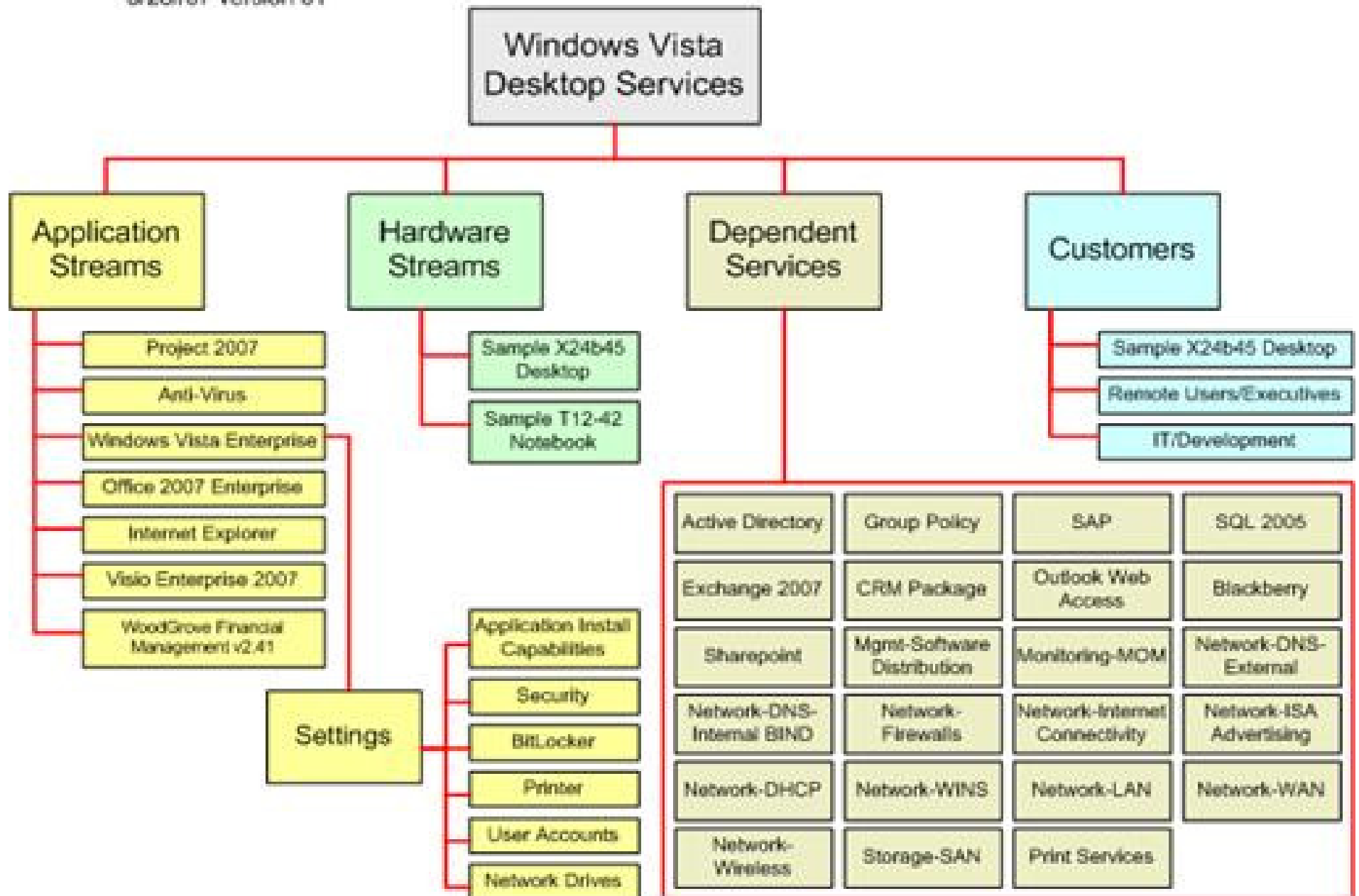
## Additional Outputs:

- List of services and service owners, both business and IT (foundation for SLAs)
- List of all IT-dependent service owners
- List of existing information sources

# Woodgrove

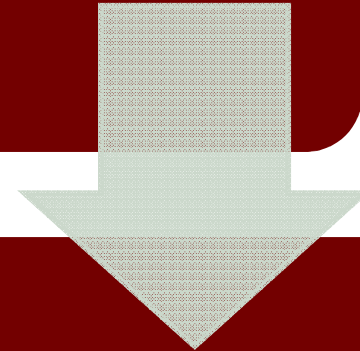
Windows Vista Desktop Service Map

3/28/07 version 01



## Discovery

- Collect requirements from the business
- Develop rating scale for evaluation
- Evaluate existing Service Catalogs/rate them.
- Determine Service Catalog platform
  - Features for future direction
  - Easy to use/maintain
  - Integration with other tools
- Look at current information sources



## Approach

- Finalize the Plan (4 Ps)
  - What services first? What platform (Features for future direction; Easy to use/maintain) -look and feel, etc.
- Communication
  - Documentation
  - WIIFM? – promotion
  - Training

# How should it look? An example....

## Information Technology Services

[Home](#) [About ITS](#) [Services](#) [ITS News](#) [Security](#) [Policies](#) [Planning & Resources](#) [For ITS Staff](#) [Contact Us](#)

[go](#)

[A-Z Services](#) | [Find People](#)

[GET HELP](#)

[ITS Maintenance Calendar](#)

### Service Catalog

[Catalog Home](#)  
[ITS Recharge Rates](#)  
[Information User \(IU\)](#)

### Service Levels

[Service Level Agreements](#)  
[Service & Systems Metrics](#)

### Quick Links

[Accounts](#)  
[CruzMail](#)  
[CruzNet](#)  
[CruzNet Secure](#)  
[CruzTime](#)  
[Desktop Standards](#)  
[Desktop Support](#)  
[eCommons](#)  
[Engineering & Construction](#)  
[Help Desk](#)  
[MyUCSC](#)  
[Network Services](#)  
[ResNet](#)  
[SlugMail](#)

## ITS Service Catalog

[Catalog Home](#)

[Campus Services by Category](#)

[Campus Services A-Z](#)

[Campus Services by Affiliation](#)

[Services for Divisions](#)

### Accounts

Account Management, CruzID...

### Business Systems

MyUCSC, Application Development and Advisory Services...

### Data Center & Servers

Server Hosting...

### Desktop Computing

Standard Desktop Support, File Servers...

### Email, Calendar & Collaboration

CruzMail, SlugMail, CruzTime...

### Help Desk Services

Help Desk...

### Instructional Technology

Classroom Support, eCommons, Computing Labs, FITC...

### Media & Event Support

Special Events, Technical Design, Media Production...

### What's New?

#### Instructional Videoconferencing

Instructional videoconferencing at UCSC involves two-way live, real-time video and audio of classroom presentations with participants in remote location(s).

#### Campus Virtual Private Network (VPN)

The Campus VPN service gives UCSC faculty, staff and sponsored students access to the UCSC network from off campus.

#### Web Services

UCSC web services feature new designs and an easy to use, powerful Campus Web Content Management System (Campus WCMS).

### Service Topics

#### IT Services for New Employees


Technology-related information and resources for new campus employees

#### Mobile Device Support

List of mobile computing devices supported by each IT service

#### Web Services

# How should it look? An example....



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**Service Catalog**

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[Engineering & Construction](#)  
[Help Desk](#)  
[MyUCSC](#)  
[Network Services](#)

### ITS Service Catalog

[Catalog Home](#)



**Student Email Service**

SlugMail is the campus email service for UCSC students. If you are faculty or staff, please go to [CruzMail](#). SlugMail offers students a fast, feature-rich email option with plenty of storage. *UCSC SlugMail is Google's Gmail service.*

#### Using SlugMail

[Getting Started](#)  
[Google Self Help](#)  
[Google Getting Started Guide](#)  
[SlugMail FAQs](#)

#### Self-Service

[Change your Email Password](#)  
[Forward your Email to Another Email Address](#)  
[Email Settings for IMAP and POP](#)

#### Google Communication Tools


UCSC SlugMail is powered by Google so students have access to popular Google communication tools such as:

#### Email News

[SlugMail News](#)  
[ITS Newsletter](#)

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#### Login to SlugMail


[SlugMail Login](#)


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[Conditions of Use](#)  
[Google Terms of Service](#)

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#### Getting Help

For help with SlugMail

#### ITS Support Center



Online: [Request Help](#)  
[ITS Support Center](#)  
[ITS Frequently Asked Questions](#)

Phone: (831) 459-HELP (9-4357)  
 Email: [help@ucsc.edu](mailto:help@ucsc.edu)





# Sample Catalog Entry Fields

Service	Contact	Service Definition	Base Level Services	Services NOT included	Service availability	Charges
Telephone & Voicemail	Jason Ward	Provision of standard telephone services	<ul style="list-style-type: none"><li>• Installation</li><li>• Support</li><li>• Voicemail services</li><li>• Analog phone setup</li><li>• Virtual phone setup</li></ul>	<ul style="list-style-type: none"><li>• Employee usage reporting</li><li>• Tracking and reporting on usage</li><li>• Remote / calling card services</li></ul>	24x7x365 for registered IT Customers	As detailed in SLA

**Additional samples in online handout.**

Source: <http://ebookbrowse.com/example-copy-of-ets-service-catalog-template-xls-d49778868>



# Do

## Committee

- Initiate all aspects of the process
- Oversee progress and implementation (Unless delegates as project)
- Define Roles, Document RACIs
- Ongoing tasks and decisions

## Policy

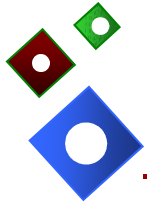
- Documented guidelines (example on upcoming slide)
  - What services will be listed?
  - Who does what?
  - How will it all work?

## Process

- Maintain single source of information on services
- Steps for: Submission, Review, Approval, Maintenance, Project deliverable
- Templates, communication, training, documentation
- Accountability,

## Implement

- Project timeline (Pilot, go live, phases, etc.)
- Deliverables
- Training, communication
- Litmus test



# Committee Defines Roles

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## A Sample...

### **Service Catalog Manager**

- ◆ A Responsible for producing the Service Catalog.
- ◆ Makes sure all services are documented in the Service Catalog.
- ◆ Ensures information is accurate and updated.
- ◆ Keeps information consistent with the Service Portfolio.
- ◆ Makes sure information is protected and is backed up

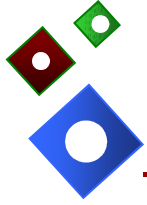
(note – the Service Level Manager helps, but the Service Catalog Manager is responsible)

## Service Catalog Entry Creation and Updating Processes RACI

<b>R</b> - Responsible <b>A</b> - Accountable <b>C</b> - Consulted <b>I</b> - Informed	Service Catalog Committee	Service Catalog Manager	Service Owner	Entry Author	Technical Reviewer	Non-Technical Reviewer	Change Manager
Entry topic approved	<b>R</b>	<b>A</b>	<b>C</b>	<b>I</b>			<b>I</b>
Author writes entry and sends to Service Catalog Manager			<b>A</b>	<b>R</b>	<b>I</b>		
Technical Reviewer does review for accuracy		<b>A</b>	<b>C</b>	<b>I</b>	<b>R</b>		
Non-Technical Reviewer reviews document against rubric, makes edits and suggestions		<b>A</b>		<b>I</b>		<b>R</b>	
Author makes revisions according to edits and suggestions		<b>A</b>		<b>R</b>			

Source: Arlington Public Schools RACI complete RACI in handouts

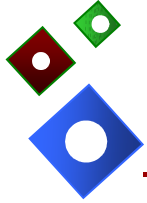
NIH Sample RACI for Rae Ann [Compatibility Mode] - Microsoft Excel non-commercial use															
File Home Insert Page Layout Formulas Data Review View Add-Ins															
P5 fx															
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Process activities	(Procedure number)	Process Owner (MM)	Data Analyst (GB)	Server Support (KK)	Director, SMO	CIT Division Directors	Incident Mgmt Process Owner	CIT Deskside Support	CIT Training	Services Team Members	Agreement Team Members			
48	Service Catalog Management														
49	PROCESS LEVEL														
50	Prepare and distribute monthly reports	SCM-PL-001	A,R	I	I	I	I	I				I	I		
51	Update procedures in SDP	SCM-PL-002	A,R	I	I	I	I	I				I	I		
52	Establish Service Catalog Process metrics	SCM-PL-003	A												
53															
54	SERVICES REPOSITORY														
55	Modify the master service form in InfoPath as required	SCM-SR-001	C		A,R										
56	Update the service form as required	SCM-SR-002	C			R						A,R			
57	Approve services in InfoPath	SCM-SR-003	A,R			C	I	I							
58															
59	LIVE CATALOG														
60	Send XML dump to DECA every Friday	SCM-LC-001	R,I		A,R							I			
61	Approve staging version for live update	SCM-LC-002	A,R												
Incident Management RACI															
Ready 100%															



## Sample of Details in the Policy:

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- ◆ Senior management and their staff are committed to inform the Service Catalog Manager of observed or reported inaccuracies in the service catalog.
- ◆ All changes to the service catalog including updates must follow the Service Catalog Maintenance Process, be approved by the Service Catalog Committee and meet the requirements of the service catalog policy.



## Sample of Details in the Policy:

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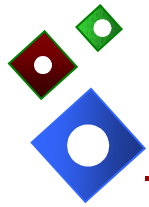
- ◆ All entries in the service catalog will be audited and updated quarterly. The review will be overseen by the Service Catalog Manager, and conducted by the Service Owner.
- ◆ The service catalog will be published under the direction of the Service Catalog Committee.
- ◆ All services listed in the service catalog will have the following details:
- ◆ All services listed in the service catalog will have one of the following status codes assigned to it: Chartered, Operational

## Submitting New Entries:

- ◆ Entry topic approved
- ◆ Author writes entry
- ◆ Technical Reviewer reviews for accuracy
- ◆ Non-Technical Reviewer reviews for understandability, helpfulness, and utility
- ◆ Author makes revisions
- ◆ Entry published in Catalog

## Who are the Authors?

- ◆ Authors are Subject Matter Experts
- ◆ Technical Reviewers are Service Owners, Managers, or SME's
- ◆ Non-Technical Reviewers have "perspective" and a writing background



# Plan Communication

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- ◆ Item (what needs to be communicated)
- ◆ What to communicate
- ◆ Who communicates?
- ◆ To Whom?
- ◆ How?
- ◆ When?
- ◆ How often?
- ◆ Comments (assess effectiveness)

Communication plan sample in handouts.



# Check

## Assess Feedback

- Build feedback mechanisms into Plan and pilot; use on ongoing basis
  - On entry itself
  - Surveys, interviews, user groups, follow up, reports etc.
- Learn overall feelings, ease of use, productivity impacts, etc.

## Measure

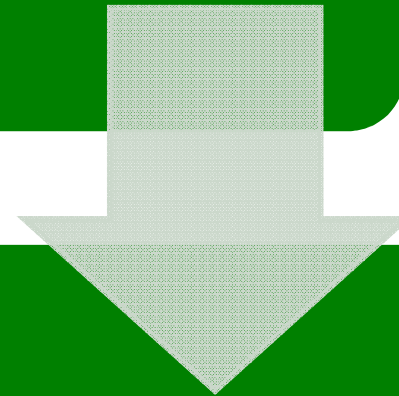
- Customer Satisfaction
- Usage
- Benefits – Easier? Faster? Better?
- Impact on Service Desk and key processes
- Tie back to goals and value to business and IT

## Trend

- What did we learn (both for customer and IT – correlations between results)?
- Trending in all areas of measures. What happened? (e.g. slow to start, increased usage, increased/decreased productivity? )
- What next. Drives expansion in functionality and entries.

## Customer Feedback

- Was it easy to use?
- Why did/didn't you use it?
- What else would you like to see in the Catalog?
- How did it help you in your job?  
(e.g. - saved time, more convenient)



## IT Feedback

- How did the Technical View of the catalog help you in your job?
- Did you direct them to the Catalog?
- Any calls about how to use the Service Catalog or about adding more services to the catalog?

# Act

## CSI

- Identify improvements and implement them (to process, catalog, etc.)
- Continual feedback/communication
- Update templates
- Foster organizational culture change - adoption

## Process

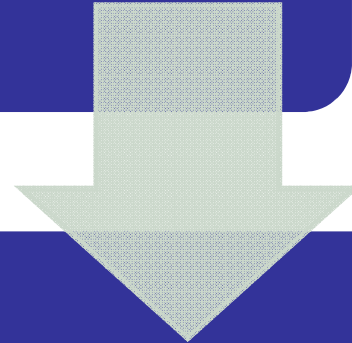
- How IT can use the Catalog to improve in various process areas?
- How can we use the change process to facilitate the Service Catalog Management process?
- How can we facilitate improvements to business processes?

## Expansion

- More entries
- More groups
- Increased functionality
- Integration with other tools

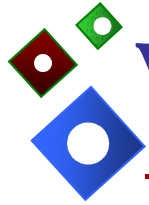
## Expansion across organization

- Include more groups – both within IT and within business
- Repeat steps: Gather requirements, understand WIIFM, let goals drive plan



## Functionality Expansion

- Communication Mechanism
  - Updates, new services, outages, status
- Self Help
  - Procurement, standard changes, requests, status checks



# What is the Practical Approach?

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- ◆ Take what you learned today and assess what you already have in place in your organization
- ◆ Success comes from:
  - ✧ Clearly defining goals and allowing them to drive decisions
    - ◆ Short, medium, long term
    - ◆ Realistic
  - ✧ Distributing workload so that it is manageable
  - ✧ Not recreating the wheel – use existing resources in the industry!
  - ✧ Taking manageable steps (phases and functionality –goals)
  - ✧ Clear, effective communication
  - ✧ True management of the process
  - ✧ Once the process is refined and the tool is understood and leveraged, expansion becomes possible and relatively painless!



# Wrap Up

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- ◆ **Really invest time in planning**
  - ✧ Initial work on policy and process documentation pays off
  - ✧ Once the process is agreed upon and refined, progress and success become easier
- ◆ **It's all about the goals!**
  - ✧ Have to be defined and truly supported
  - ✧ Everything goes back to success in reaching the goals (value, quality, satisfaction, productivity, improvement, etc.)
- ◆ Additional information in session handout (online)

