ITIL® – a factor for all purchases

by Bill Irvine and Jack Probst

Building IT standards into RFPs

THE IT INFRASTRUCTURE library (ITIL) is a best practice process framework gaining global acceptance as a way to help IT organizations design, deliver and manage the services offered to their customers and users. One way to think of this is for IT to manage IT capabilities as a business. IT's business is to offer stable, high quality services for its customers, and IT must effectively manage all internal and external resources at its disposal.

A key requirement of this business operation is the selection and management of the equipment and systems suppliers that make up the core infrastructure, and the external service providers who will supplement the internal capabilities. Success or failure can hinge on the choices made and the integration of these facilities into the overall service delivery architecture.

ITIL underpins the key IT processes required to manage your service operations.

Vendors or service providers must support and enhance the new service model, hence the need for new content in RFPs and contractual documentation for new hardware/software, outsourced applications development, outsourced ASP services, managed network services, managed support services, contingency support, and multi-vendor full lifecycle service provision.

Almost every vendor or service provider request today has specific ITIL compatibility and in some cases ITIL compliance (ISO 20000) expectations that must be addressed as part of the overall solution. At the very least, the vendor must align with and support the guiding principles of ITIL, accepting the implications of their product/service being used within this "ITILized" client environment.

Many major vendors and service providers have already adjusted their product roadmaps and marketing strategies to align with ITIL. Their strategies recognize the impact ITIL is having as a *de facto* standard and they are assuring that their products will support their customers' commitment to these processes.

Both the customer and supplier benefit when they use common ITIL terminology and have standard approaches to the management of each of the key operational and tactical processes. This mutual support fosters more consistent and efficient interaction, limiting the translation required when working across organizational boundaries.

There are several typical design requirements in RFPs for selected ITIL processes:

- **Service desk**
  Traditionally, service desk and desktop support are areas where there has been difficulty in connecting the supplier process to the customer's internal process. Customer RFPs are now requiring that outsourced service desk providers use the customer support processes and tools to manage service calls to ensure the integration of their operations and prevent issues that "fall through the cracks."

- **Incident management**
  – Hardware suppliers must automate the generation of Incidents in a common format from internal event detection capabilities within servers, storage units, applications, etc.
  – incidents are generated and managed using the customer's prioritization scheme and escalation criteria.

- **Problem management**
  – Solid ITSM products must support identifying and defining work-arounds for problems. Work-arounds help minimize user impact and improve resolution times.
  – Supplier products should underpin root cause analysis on reported problems and enable customer access to known error database/knowledge base for problem investigation.

Note – ISO 2000 is the new certification that confirms an organization is following the workflows and definitions as described in ITIL. Some service providers are also preparing to become ISO 2000 registered to prove their support credentials and service management focus. It is expected that ISO 2000 certification will become a common requirement within future RFPs.

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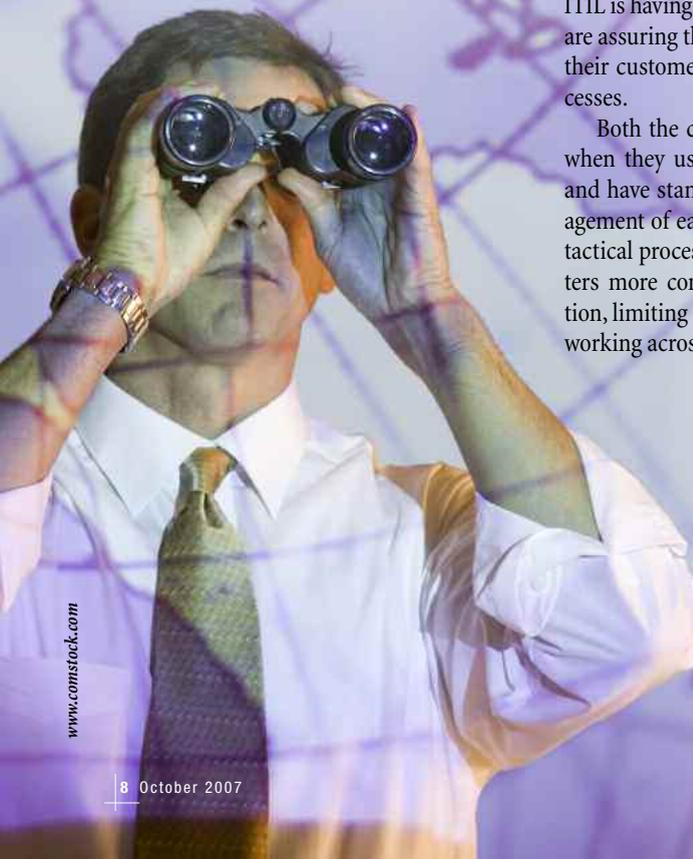
- **Change management**
  - Suppliers must provide advanced notification of planned changes to equipment and services under management.
  - Customers should have the ability to influence when change to services will be scheduled and implemented to suit customer business needs.
  - Supplier must provide a process for registering customer requested service changes

- **Configuration management**
  - Supplier must ensure their product can be discovered and managed by industry standard system/service management tools and provide reporting capability of configuration relationships and the current state of components.
  - Supplier must inform customer of any status changes of all managed components, circuit routings and services that may impact customer operations.

- **Release management**
  - Outsourced applications development activities must be integrated with the customer's release management process as well as the more

typical applications development lifecycle.
  - Supplier must provide proof of appropriate testing including formalized customer acceptance.
  - Release management products should support the capture of release notes documenting planned functional application and/or service changes.

Once you have selected the vendor that will meet your expectations regarding conformance with your ITIL processes, you need to ensure that the supplier contracts and agreements are aligned to your business needs.

Using ITIL's supplier management process, you should manage supplier relationships and overall performance of the suppliers' services. The RFPs must establish the management expectations and customer requirements and define the methodology that will be used to ensure the regular review and assessment of the services. This includes the schedule of review meetings, performance reporting requirements, review of specific events and outages, and a detailed breakdown of the customer/vendor responsibilities in the form of a RACI (responsibility, accountability, consulted and informed) matrix.

The general goal is to confirm that your suppliers and providers share the same strategic vision regarding service and have a set of processes that help to manage it. ITIL is a great way to ensure the commonality of purpose and a lexicon to enhance our management partnerships. ⋀⋀

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John (Jack) B. Probst, executive consultant, has a diverse management, business and technical background. At Pink Elephant, his responsibilities include process consulting and advanced ITIL training and education programs. Jack is certified as an ITIL service manager and he previously served as the leader of an ITIL implementation initiative at a Fortune 100 organization. Jack has experience in IT process development and implementation, IT and business strategic alignment, business operations and general management. Over the past 30 years in the insurance industry, Jack led line and staff organizations and spent the last 17 years in various senior management positions. Additionally, Jack is recognized as a seasoned speaker and educator, most recently teaching at the graduate level.