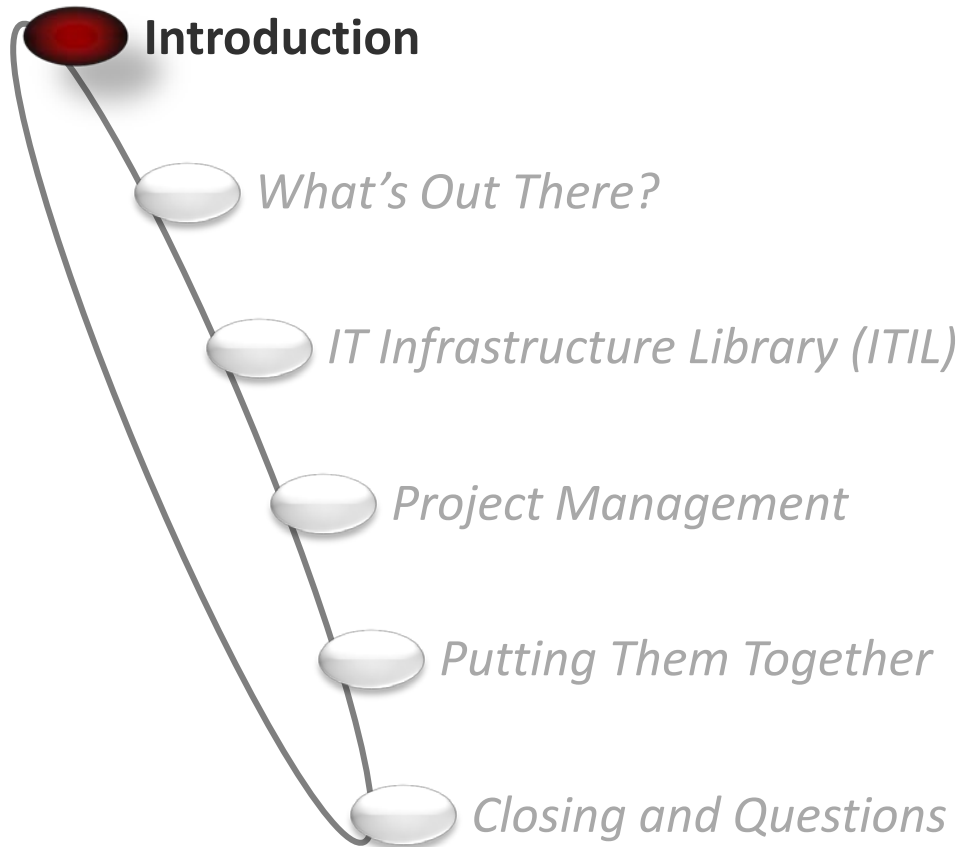# ITIL Service Lifecycles and the Project Manager

The intersection of IT Service and Project Delivery

Presented to: Kansas City Mid-America PMI Chapter

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January 17, 2011

Agenda

Introduction

What's Out There?

IT Infrastructure Library (ITIL)

Project Management

Putting Them Together

Closing and Questions

Introduction
Synopsis

ITIL and PM: Two points of view with one goal. There is often much confusion today regarding how and when Project Management principles align with the various Service Lifecycles of the ITIL Framework. The answer is not always easy. ITIL focuses on providing IT services with respect to customer expectations, while PM drives and delivers projects that delivers a product or service for that customer. Often times, the failure to use these differences to our advantage results in overall service failure. Although these two disciplines have their differences, with closer inspection, they have many more inputs, outputs and dependencies that meets the eye. In this one hour presentation, we will explore the essentials of how these two often separately managed frameworks can leverage each other to produce the results asked for by their customers. *Two points of view with one goal.*

Introduction
Learning Objectives

The intent of this presentation is to discover the many synergies and intersections of the ITIL Service Lifecycle Phases and Project Management. Our learning objectives include:

- Understand the basic elements of the IT Infrastructure Library (ITIL) and the service lifecycle phases.

- Review foundational aspects of Project Management based on the Project Management Body of Knowledge (PMBOK).

- Understand the similarities, differences, and intersections of these two disciplines and how they both lead towards the same goal.

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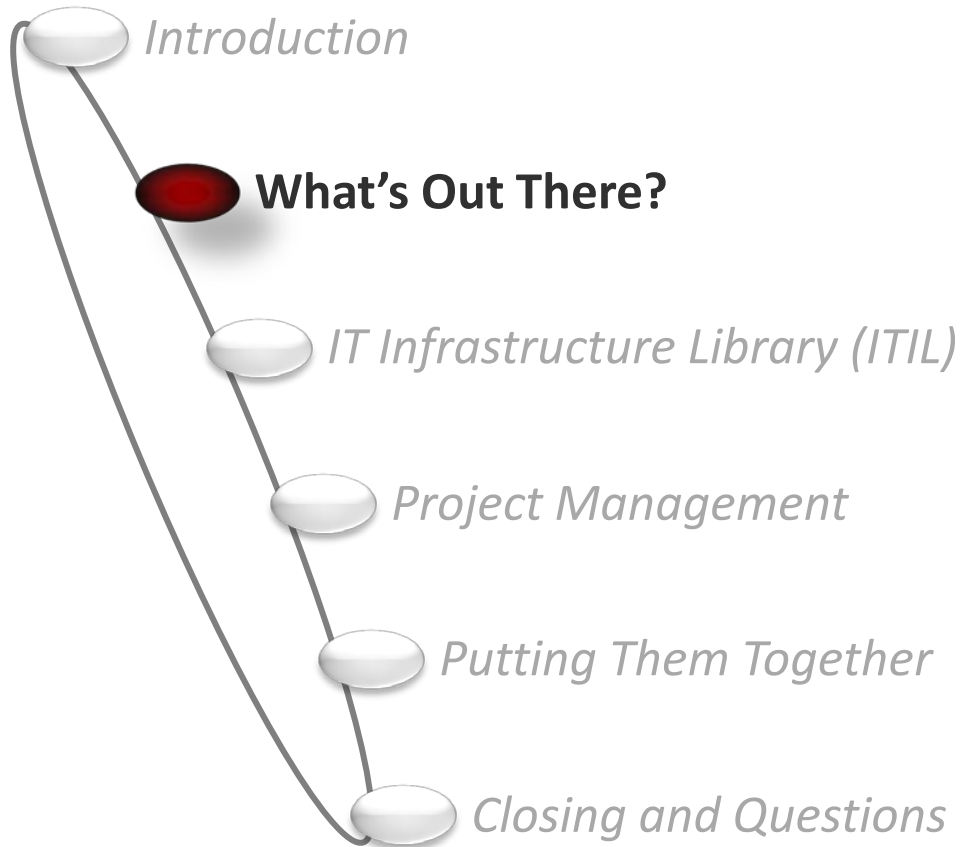
What's out there?
Models, Frameworks, Standards, and Best Practices

There are multiple models, frameworks, standards, and best practices to chose from when considering governance initiatives. A short list of these include:

- **Service Management**: IT Infrastructure Library (ITIL), Microsoft Operations Framework (MOF)

- **International Standards Organization (ISO)**: 20000, 27000, 38500

- **IT Controls and Alignment**: Control Objectives for Information and Related Technology (COBIT), VAL IT

- **Project Management**: Project Management Body of Knowledge (PMBOK), Projects in Controlled Environments (PRINCE2), Agile

- **Others**: Business Analysis Body of Knowledge (BABOK), Business Process Management Common Body of Knowledge (BPM CBOK), Software Engineering Body of Knowledge (SWEBOK), The Open Group Architecture Framework (TOGAF), Six Sigma, etc.

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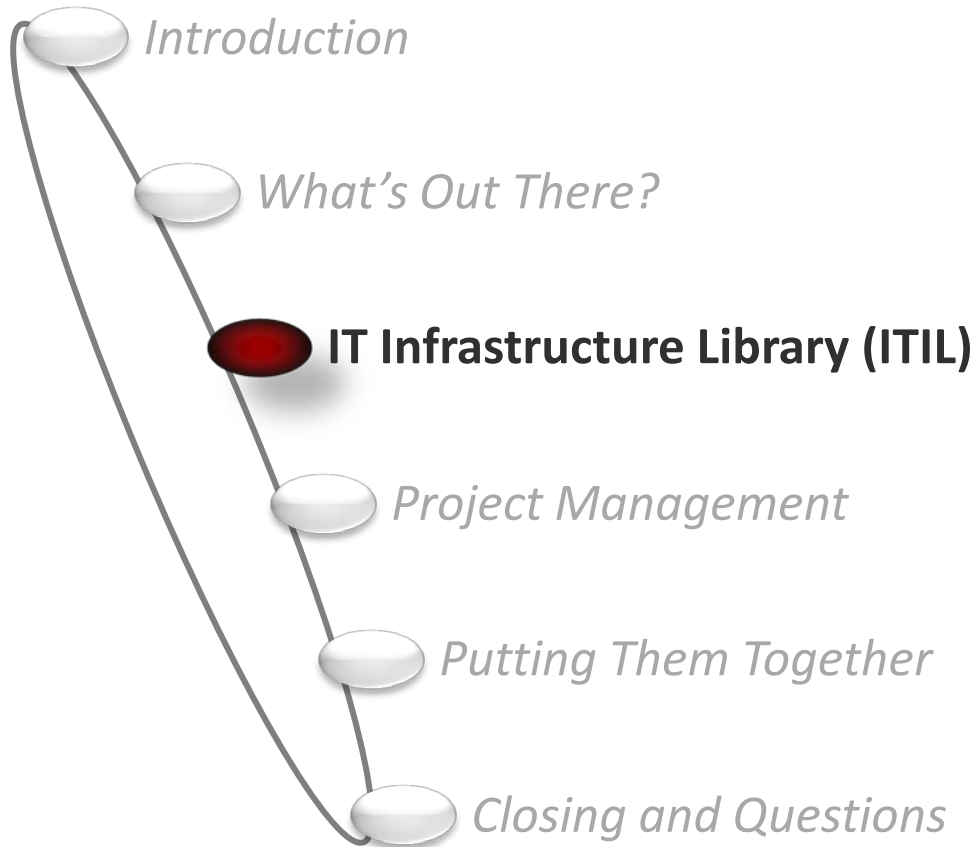
IT Infrastructure Library (ITIL)

What is ITIL?

ITIL is the most widely accepted approach to IT service management in the world. Providing a cohesive set of best practice guidance drawn from the public and private sectors across the world.

- ITIL is guidance developed by the United Kingdom's Office of Government Commerce (OGC) and has become a world-wide de facto standard in Service Management.

- The Guidance, documented in a set of five books, describes an integrated, process based, best practice framework for managing IT services.

- Currently these books are the only comprehensive, non-proprietary, publicly available guidance for IT Service Management.

IT Infrastructure Library (ITIL)
Services, Processes, Roles, and Functions

The ITIL Framework focuses on the following key areas to assist in proper management of the Service Lifecycle:

Services

A means of delivering value to customers by facilitating outcomes customers want to achieve without the ownership of costs and risks.

Email

Processes

A coordinated set of activities combining and implementing resources and capabilities in order to produce an outcome which creates value.

Incident Management

Roles

A set of connected behaviors or actions that are performed by a person, team or group for a specific outcome.

Incident Manager

Functions

Units of organization specialized to perform certain types of work and are responsible for certain outcomes.

Service Desk

Reference: ITIL V3

IT Infrastructure Library (ITIL)
IT Services

Service management is a set of specialized organizational capabilities for providing value to customers in the form of services.

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

- From a customer's perspective, value consists of two primary elements: utility (*fit for purpose*), and warranty (*fit for use*).

- Services are part of the IT Service Portfolio, and are communicated to customers via the Service Catalog.

Reference: ITIL V3 Service Strategy Publication

IT Infrastructure Library (ITIL)
Lifecycle Phases

The ITIL framework is focused on the lifecycle of an IT Service. There are five phases of this lifecycle.

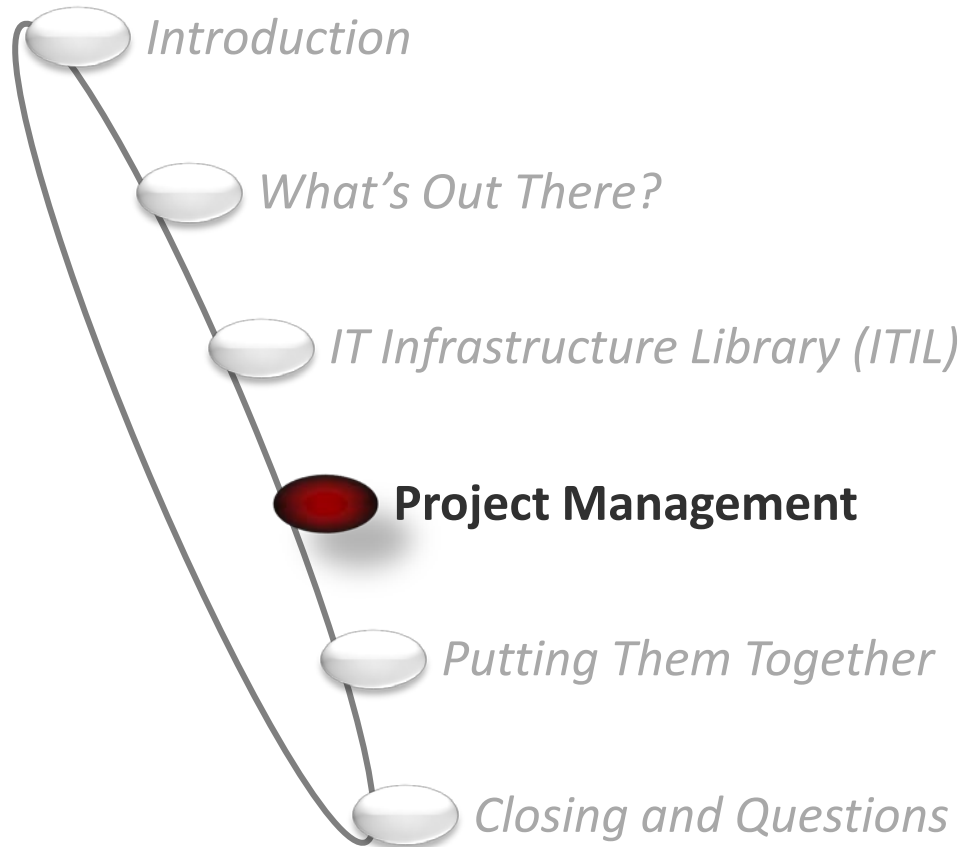| Service Strategy	Service Design	Service Transition	Service Operation	Continual Service Improvement
As a point of origin for the phases, Service Strategy provides guidance on clarifying and prioritizing investments in services.	Provides guidance on the design of IT Services, processes and other aspects of the effort by addressing how a planned service solution interacts with the business and technical environments.	Describes the delivery of services required by a business into live or operational use, and often encompasses many project delivery aspects.	This is where services are actually delivered and supported in the in the business environment based on previously designed service levels.	Aligning and realigning IT Services to changing business needs by identifying and implementing service improvements that support business processes.

Reference: ITIL V3

IT Infrastructure Library (ITIL)
Processes

Each phase of the lifecycle has processes defined that support each phase. Below is a sample of these processes:

SS Service Strategy	SD Service Design	ST Service Transition	SO Service Operations	CSI Continual Service Improvement
Financial Management	Service Level Management	Change Management	Event Management	CSI Model
Service Portfolio Management	Service Catalog Management	Service Asset and Configuration Management	Incident Management	Plan-Do-Check-Act
Demand Management	Availability Management	Release and Deployment Management	Request Fulfillment	
	Capacity Management	Knowledge Management	Problem Management	
	Information Security Management	Service Validation and Testing	Access Management	
	Service Continuity Management	Service Evaluation		
	Supplier Management			

Functions
- Service Desk
- Technical Management
- Application Management
- Operations Management

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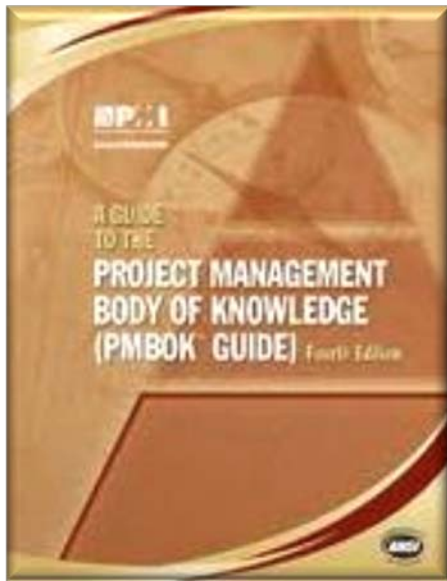*Putting Them Together*

Closing and Questions

Project Management
Definitions

A Guide to the Project Management Body of Knowledge (PMBOK) is a recognized standard for the project management profession that has evolved from the recognized good practices of project management practitioners who contributed to the standard.

- A project is a temporary endeavor undertaken to create a unique product, service, or result.

- Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Reference: A Guide to the Project Management Body of Knowledge, Fourth Edition

Project Management
Knowledge Areas

Project Integration Management

- Develop Project Charter
- Develop Project Management Plan
- Direct and Manage Project Execution
- Monitor and Control Project Work
- Perform Integrated Change Control
- Close Project or Phase

Project Scope Management

- Collect Requirements
- Define Scope
- Create WBS
- Verify Scope
- Control Scope

Project Time Management

- Define Activities
- Sequence Activities
- Estimate Activity Resources
- Estimate Activity Durations
- Develop Schedule
- Control Schedule

Project Cost Management

- Estimate Costs
- Determine Budget
- Control Costs

Project Quality Management

- Plan Quality
- Perform Quality Assurance
- Perform Quality Control

Project Human Resource Management

- Develop Human Resource Plan
- Acquire Project Team
- Develop Project Team
- Manage Project Team

Project Communications Management

- Identify Stakeholders
- Plan Communications
- Distribute Information
- Manage Stakeholder Expectations
- Report Performance

Project Risk Management

- Plan Risk Management
- Identify Risks
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Plan Risk Responses
- Monitor and Control Risks

Project Procurement Management

- Plan Procurements
- Conduct Procurements
- Administer Procurements
- Close Procurements

Reference: A Guide to the Project Management Body of Knowledge, Fourth Edition

Project Management
Process Groups

Project management processes are grouped in to five categories known as Project Management Process Groups. These process groups are not phases

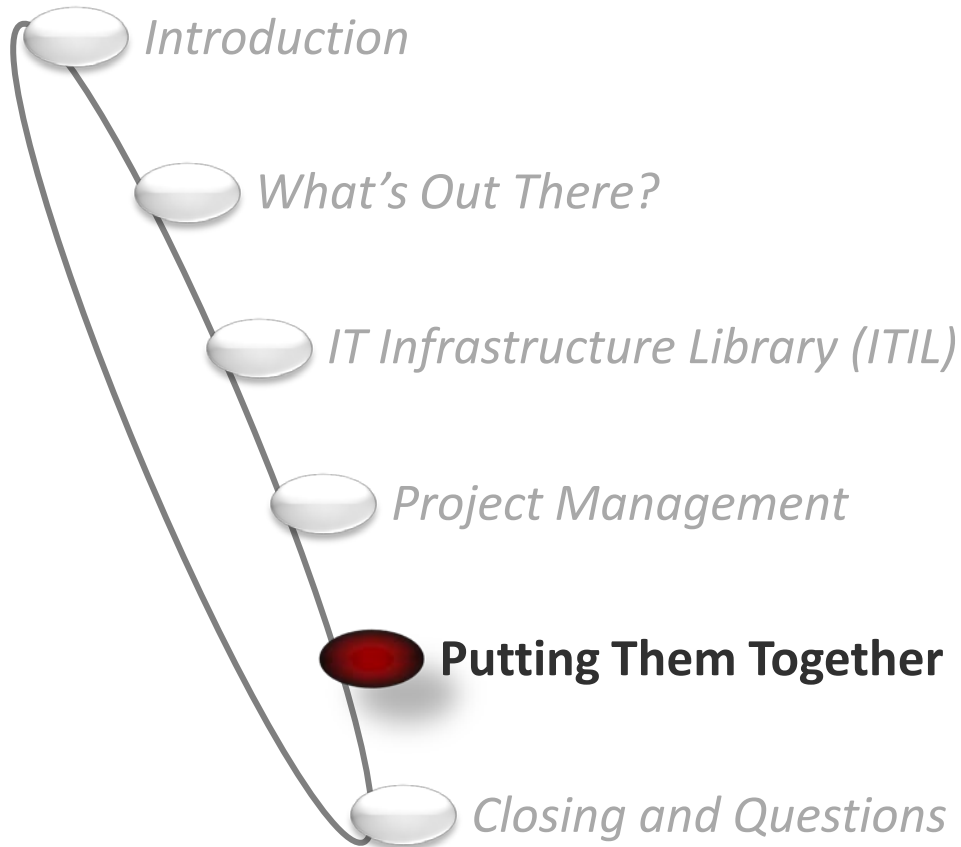| Initiate	Plan	Execute	Monitor & Control	Close
Processes performed to define a new project or a new phase oaf an existing project by obtaining authorization to start the project or phase.	Processes required to establish the scope of the project, refine the objectives, and define the course of action required to attain the objectives that the4 project was undertaken to achieve.	Processes performed to complete the work defined in the project management plan to satisfy the project specifications.	Processes required to track, review, and regulate the progress and performance of the project; identify any areas in which changes to the plan are required; and initiate the corresponding changes.	Processes performed to finalize all activities across all Process Groups to formally close the project or phase.

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Putting them Together
ITIL and PMBOK Similarities

Services are all of the things we do to deliver value to our customers. In effect services are a type of product. Projects are temporary endeavors to accomplish specific outputs. So we can look at projects as one mechanism or vehicle for establishing and delivering services and products.

- Both aim to provide reference guidance, common language, and descriptive vs. prescriptive solutions: ITIL focuses on the lifecycle of *services*, PMBOK focuses on the lifecycle of *projects*.

- Both are managed through international practitioners, with initial publications in the 1980's and cover emerging professions with education and certifications.

- Both are scalable, adaptable, and leverage the utility of a framework to organize knowledge and processes.

- Both have user groups (PMI, ITSMF).

Putting them Together
ITIL and PMBOK Differences

The differences are inconsequential when considering the value of combining the two. With all of the similarities mentioned, there are still differences that need to be understood:

- ITIL focuses on IT Services and the processes that support them, PMBOK focuses on effective execution of projects and is applicable to multiple domains.

- ITIL evaluates what is needed, PMBOK turns this into a project.

- PMBOK has explicit Code of Ethics; ITIL does not.

Putting them Together

Service Related Projects

ITIL V3 and PMBOK are very complementary and fit well into the overall Service Management approach. The demand for a new or changed service drives the need for a project.

- Initiating a "Service" project will be a result of ITIL Service Strategy and Service Design.

- The project team may then use PMBOK guidance for accomplishing the objectives.

- Therefore, competency in Project Management is vital to realizing intended outcomes of the new or changed service.

Putting them Together
Key Phases

- Of the five phases, Service Design, Service Transition, and Continual Service Improvement have strong focus on managing changes that maximize business outcomes while minimizing risk.

- Many changes are implemented (design-build-test-release-deploy) as projects.

- Conceptually this generally aligns Project Management to ITIL Service Transition activities (with some overlap to Service Design and Service Operation).

- Service Transition includes processes such as Change Management, Service Asset and Configuration Management, Knowledge Management, and Release and Deployment Management which dovetails closely with Project Management activities.

Putting them Together
Integrating ITIL and PM

Although there is no direct mapping between the ITIL V3 Lifecycle Phases and the PMBOK Process Groups, they generally align around the following table:

ITIL V3 Phases	PMBOK Process Groups
Service Strategy	Initializing and Planning
Service Design Service Transition Service Operations	Executing
Continual Service Improvement	Controlling
*(*Service Retirement*)	Closing

*ITIL V3 does not have a phase that directly maps to the PMBOK's Closing phase. ITIL is focused on services and the processes that are monitored, measured, and improved. The nearest ITIL gets to this phase would be the retirement of a service.

Putting them Together
Integrating ITIL, PM, and Development Lifecycles

Although aligning frameworks does not provide a perfect map of how phases and process groups correspond to each other, this illustration shows a general map of their relationships.
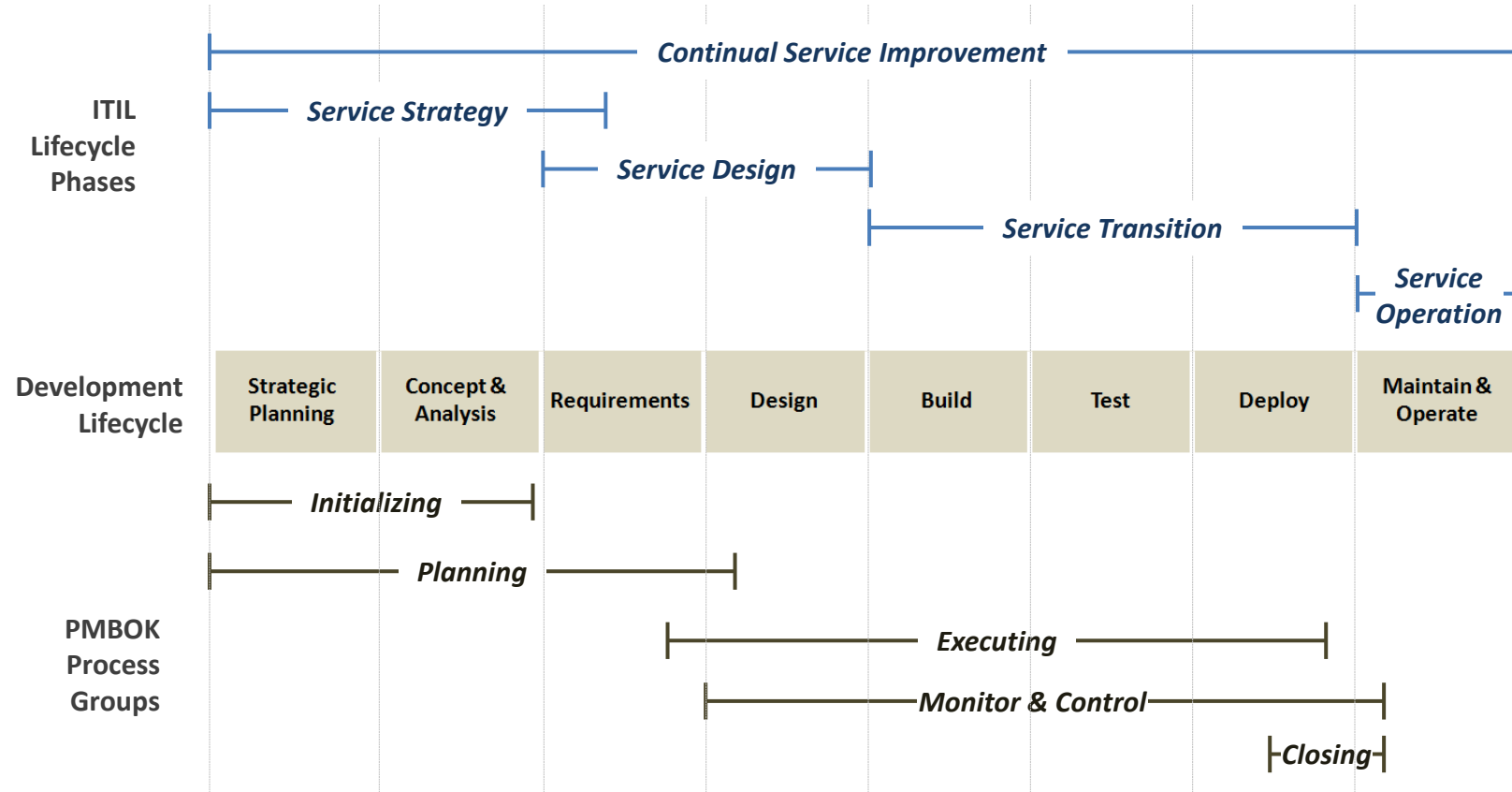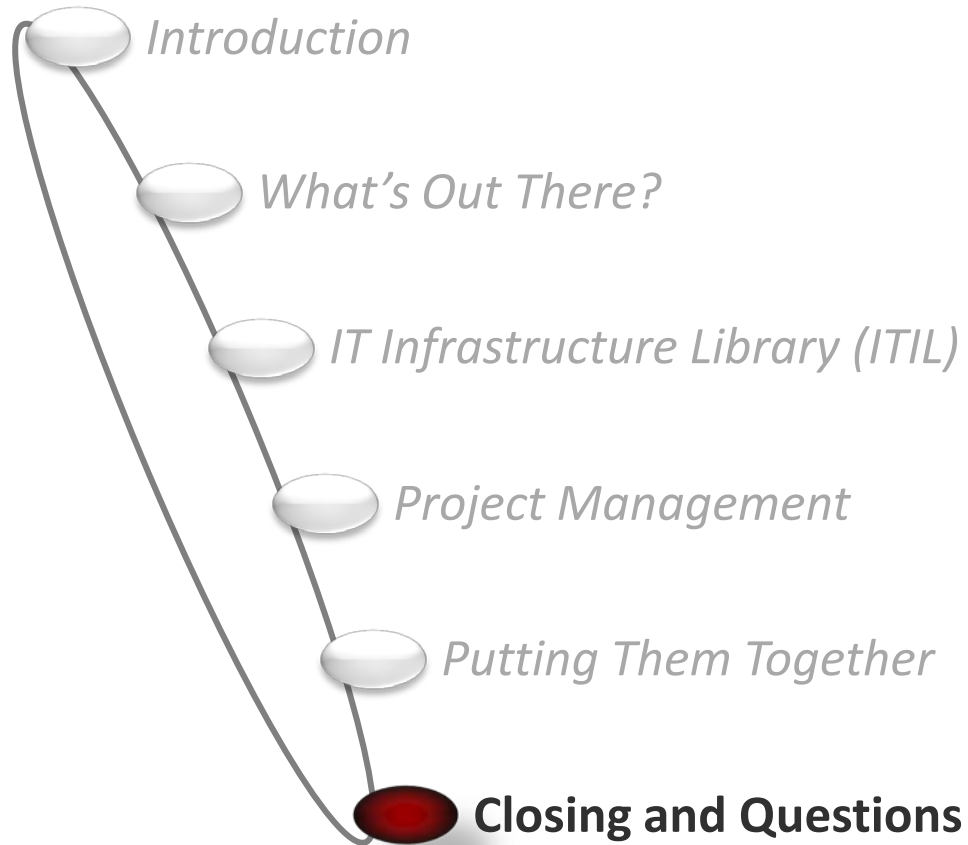
Putting them Together
Tips for Project Managers

It is important to remember that the ITIL Lifecycle Phases and Project Management do not always map perfectly, it is largely dependent of the type of project and organizational frameworks. In any case, here are a few tips for Project Managers:

- Become familiar with your organization's perspective on IT Service Management and how it's used to deliver services.

- Know who has accountability and responsibility for various areas of Service Management (Service Level Management, Change Management, etc.).

- Align Project deliverables with Lifecycle activities where possible.

- Know the ITIL definitions.

- Recognize that both frameworks strive to manage quality, risk and accountability.

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