Building a Collaborative ITSM Community on a Skeptical Foundation

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- Today I'm going to cover some of the challenges we're facing at Irvine with respect to implementing an ITSM strategy in an environment where the majority of our staff are up to their eyeballs in operational issues and are understandably reluctant to put any of that aside to learn new processes.
- Initially we thought we were just implementing ServiceNow but the farther we got into it, the more obvious it became that:
    - **We're not implementing ServiceNow,**
    - **We're implementing an ITSM strategy.**
- We quickly discovered that implementing ServiceNow as a replacement for our existing processes would just perpetuate the inefficiencies but we'd be inefficient *faster*.
- So, we decided to take a closer look at what we want to accomplish...

- Using **common methods** to manage and measure incidents, problems, changes, projects, service levels, and risks is a goal sought by every IT organization tasked with supporting an enterprise IT system.
- The value of using a **comprehensive IT service management program** is clear and there's no argument that standards, best practice frameworks, and purpose-built toolsets are the way to go.
- However, there are those who argue that the **structure** imposed by standards and frameworks:
  - **Can be counter-productive** and add unnecessary overhead,
  - Produce only marginally useful results.
- **In other words:**
  - Implementing an ITSM framework will **provide immense improvements in the delivery** of services to IT clients, BUT
  - The implementation process also **introduces stress** on already overburdened staff.
- And of course, we'd all like to have **more time and less stress.**

- **In this session** I'll tell you how UC Irvine is approaching the challenge of herding nearly 350 IT Professionals into the modern world of ITSM standards and best practices.
- We'll review how we:
  - Developed strategies, Learned lessons, Retrenched, and Persevered (so far).
  - Are gradually transitioning from a distributed IT support model relying on 40+ IT support teams to a consolidated Office of Information Technology.

A Brief History of OIT at UCI

- 2009 – Started Talking About Consolidation
- 2010 – Consolidation Complete (Admin)
- 2014 – ACIO Added to Office of the CIO
- 2014 – Reorganized OIT Divisions
- 2014 – ServiceNow Acquired
- 2015 – Implemented Basic Applications
  - SSO, Incident, Knowledge
- 2016 - Implemented More Applications
  - Project, Change, Service Catalog, Request, Contract, ESS, Survey, CMDB, Others

- In **2009**, UCI decided to consolidate a dozen or so separate IT units into a single Office of Information Technology.
- A year later in **2010**, the consolidation was complete—at least from an administrative standpoint.
  - UCI had it's first CIO (Dana Roode)
  - Teams were reorganized into **10 divisions** roughly along the lines that they were organized prior to consolidation.
  - Most divisions, and even some teams within divisions, continued to operate independently without common processes.
  - "Consolidation" wasn't moving as quickly as everyone would like.
- At the tail end of 2013 (really the **beginning of 2014**) OIT expanded executive leadership to include an Assistant CIO (Kian Colestock).
  - This put the consolidation effort into high gear and included direction to implement ITSM best practices.
- By the **end of 2014** OIT divisions had been reorganized into five functional divisions plus Business Services and the Office of the CIO.
- 2014 also saw the **acquisition of ServiceNow** as the preferred OIT-wide platform for ITSM.
- Between 2014 and now we've been feverishly implementing pieces of ServiceNow but more along the lines of:
  - Using the ServiceNow tool to fix some obvious pain points and meet some clear needs.
- **And that's where we are today.**

- What's lacking is that we haven't really been doing this in a structured, top-down way with well-though-out strategies and goals.
- This has been working pretty well so far, but now it's time to go back and reevaluate our goals.

- OIT currently includes 330 FTE (not including students) on its way to 350 or so by the end of the year.
- I don't want to leave the impression that people are being deliberately difficult **but** when it comes to interruptions in the regular routine, most of our staff turns out to be from Missouri—**Show Me.**
- Not having instant and unconditional buy-in from all OIT staff has lead to a number of encounters with staff who don't really see the value of all this work.
- That has made this as much a **marketing and training** project as an **implementation effort**.
- You'll see several mentions of ServiceNow during my presentation but the focus will be not so much the tools as:
  - **How we're using ServiceNow to establish basic ITSM principles within OIT.**
- I'll go on in this way for a while and then Kian Colestock, our Assistant CIO will talk a little about how this is making his life so much easier.
- I'll touch on:
  - How we use the idea of **"Quick wins"** to get people's attention and get them engaged;
  - Some of the **marketing** we've done;
  - **Training and personnel development** for anyone who wants to hop on and help;
  - The **"train the trainer"** approach we've employed that allows anyone who wants to get their hands dirty to jump on the bandwagon;
  - The role of **management support**, including the "incentive" of **cascading goals**;
  - The promise of **relieving some of the administrative burden** by **automating**

status and other reporting;

- I intend to demonstrate that it just might be possible to get everyone using an ITIL-based framework without insisting that they drop everything and spend weeks getting their ITIL certifications and learning new procedures.
    - **At least, that's the plan.**

- Marketing concepts are the same all over:
  - **Communicate** with clients
  - **Demonstrate** the benefits
  - **Find allies** and make friends
  - **Sell stuff**
- It's no different here.
- From a **Communication** standpoint, we attend *lots* of meetings with:
  - Executives,
  - Their management teams, and
  - The individual teams that actually deliver the services.
- To touch those who might somehow be missed in that process, we also do *lots* of presentations:
  - Monthly **OIT all-hands** meetings
  - Monthly **OIT leadership** meetings
  - **Other campus IT teams** including the school IT teams, Extensions, and anything else we can think of.

- We make regular use of **email announcements** regarding newly deployed capabilities, upcoming system patches, etc.
    - Pretty much anything that keeps ServiceNow in peoples' inboxes.
- OIT has a weekly **Change Management Group** that's open to anyone who wants to join but is really mostly made up of the people responsible for client-facing production systems.
    - About a year ago I invited myself to participate in these, added myself to the regular agenda, and now I provide a weekly update with at least one really exciting discussion point.
    - **The outcome of this** is that ServiceNow is now recognized as an integral system in OIT, even if not everyone knows yet how it impacts them directly.

- **Quick Wins:**
- During discussions with team managers or with the teams themselves often some minor annoyance about current processes comes up.
    - You have no idea how many times I've been asked "Can ServiceNow do that?"
    - This is an opportunity to suggest a solution based on some feature of ServiceNow.
    - While this is often not a complete or long-term solution, it does get people thinking about how else they might leverage this system.

- **Peer Pressure:**
- Never underestimate the power of "**inside knowledge**" to grab the attention of

technical people.

- Dropping buzz words makes technical folks feel like they're part of the program.
- **We all do this:**
  - In a meeting we hear a phrase like "business service" and nod our heads sagely as though we know precisely what that means.
  - But then the first thing we do when we get back to our desk is Google "business service" to make sure we have it right.
  - Then we discover that "business service" is sometimes erroneously applied to a "business application" so we go and look that up also.
  - Next thing you know, *we know the difference*—even if we're one of the ones who used to use them interchangeably.
- I consider this a form of peer pressure because by strategically dropping buzz words that I know no one else understands, I can stir up someone's curiosity.

- **Workshops** have turned out to be a terrific way to get people involved.
- For **Project Management**:
  - Expanding our one 90-minute session into two 90-minute sessions because 1.5 hours just wasn't enough time.
  - Delivered the workshop five times for a total of 100 participants, each of whom gave up three hours of their time.
- **Reporting and Dashboard Management** are pretty much ongoing.
  - Did an initial round of a half-dozen or so sessions last December and requests for more are still trickling in.
- Readying **Change Management** and **Request Form Development**.
- Our **Knowledge Base** is also coming into its own.
  - ServiceNow has some very **robust kbase tools**.
  - We encourage **anyone and everyone** to submit articles.
  - These are vetted by technical writers before publication.
  - OIT staff has traditionally relied on our wiki when they bother to prepare documentation at all.
  - This is gradually changing as people discover to capabilities of **Knowledge Management**.

- **One-On-One** turns out to be one of the most valuable means of training available.
    - We end all presentations, meetings, emails, conversations, whatever with: "Come see me and we'll work it out."
    - More often than not these turn out to be BA sessions where we learn a lot about what our colleagues are doing while they learn a lot about ITSM.
- **Casual Conversation** is your very best friend.
    - This is how we teach our children to talk, right?
    - Use the correct words in the correct context.
    - Some things that are obvious to most of us in this room are not so blatant to the uninitiated.
    - We constantly explain that **Incidents** are used to handle *broken things* while **Requests** are for *routine services*.
    - **Changes** are used to manage *changes to production systems* while **Projects** introduce new systems or major modifications to existing ones in an orderly manner.
    - **ITIL** is a framework on which to build an **ITSM** (and not the only one at that).
    - Some of our more spirited conversations come about while trying to explain why using CMDB just to keep track of assets is like using an elephant as a leaf blower:
        - It'll get the job done but there's *so much more* the elephant can do.

- **Challenge works both ways:**
  - As often as we get the question "Can ServiceNow do X?" we reply with "Sure. Wanna learn how?"
  - Our goal from the beginning has been to **"train the trainer."**
  - It's not effective to do something for someone and then send them off with a gift box containing their new toy.
  - Here's an opportunity to not only get something in the hands of someone who will appreciate it but 99.999% of the time, they'll go away and start tweaking it.
  - Now we have another trainer working in an environment where ITSM principles can't be avoided.
- A **common complaint** about ServiceNow is that it's **so complicated** with so many entry points and so many ways to do things.
  - Our job is to make people realize this is really a good thing.
  - ServiceNow is complicated for a couple reasons:
    - First, **ITSM doesn't insist on any hard and fast rules about how to manage services**.
      - There's no book that says do X, Y, and Z then load these records into those tables then you're done.
      - There are dozens of ways to do most anything so ServiceNow has to be complicated in order to accommodate the common best practices.
    - But **mostly it's complicated because what we do is complicated**.
      - If our jobs were easy then anyone could do them and they

wouldn't need us, right?

- **ServiceNow is a tool and not a service** we deliver to our clients.
- It has to be learned but **you don't have to learn it all**.
    - Just **ignore the parts that don't apply**.

- In 2014 OIT introduced the concept of **Cascading Goals**.
- **OIT Principles**:
    - I won't detail these because the actual principles don't matter and they're probably much the same as yours:
        - Maintain infrastructure,
        - Support the academic mission,
        - Support administration of functional units,
        - Continuous process improvement, etc.
    - These principles define what value OIT provides to the campus—they define our **Mission**.
- **Strategic Objectives** are identified for each of the five OIT divisions.
    - This is how each division intends to support each of the Guiding Principles.
    - It is the responsibility of each divisional director to define their Strategic Objectives and justify to the CIO why they're important to OIT's Mission.
- **Projects and Initiatives** are identified within each division in support of the division's Strategic Objectives.
    - Projects are the responsibility of the PMs or team leaders assigned to the project.
    - **Project Tasks** are assigned to individuals in the teams.
    - It is the responsibility of the team leaders to ensure that project tasks are completed.
- **SMART** – **S**pecific, **M**easurable, **A**ssignable, **R**ealistic, **T**ime-related
- Most importantly, the individual goals are now being used as part of the annual

Performance Evaluation process.

- This makes them much more interesting to those assigned complete them.

- The first thing people want to know is "What can this do for me?"
- That's a tough question when most of the work done out there at the tip of the spear is someone shredding code or installing hardware or providing consulting.
- How *do* you automate those things?
    - The answer is: You don't. You automate all the things that keep you from spending your time on the things that *can't* be automated.
- The trouble is, most people are doing administrative work that they think is critical because they've always done it and it's always been critical.
- While the administrative duties are important, that's not why we hire technical staff.
- Part of the challenge is separating the functions that can be automated from those that can't.
- **Tracking Goals:** One of the most clever things we did was to implement the **Cascading Goals** I just mentioned.
    - This alone made people start to ask one very important question: **What is the need for this particular task I'm doing right now?**
    - If they're not able to peg that task to a specific cascading goal then there's some serious doubt about whether the task really needs to be done.
    - This also helps keep people focused on things that are important to OIT's mission while identifying things that are keeping them from completing the important work.
- **Remove Threat**
    - People (particularly technical people who often think of themselves as "artists" of one sort or another) who are unaccustomed to having their performance

measured, often feel threatened by all the tracking and reporting that's suddenly going on.

- When I'm accused of tracking someone's performance via ServiceNow, my response usually something like this:
  - "What? We're not checking on your productivity. We already know that's first-rate and that's why you still work here.
  - What we're trying to figure out is how we can streamline some of the admin stuff you have to do so you can do even *more* of your excellent work."
- Something else may work in your environment but the point of the conversation is that the purpose of an ITSM system is not to stifle creativity but to free up time so people who have valuable skills can spend more time applying those skills.

- **Less Stress, More Time:** Earlier I mentioned **Quick Wins**.
  - For us, one of them was adding the ability for PMs to post current status to project records and then using that information to produce aggregated project status summaries.
  - PMs who don't have time to compile a monthly report of their progress on all their projects usually have a couple minutes to add a sentence or two to the project record.
  - They now produce monthly project reports on time every time and in a format that's consistent across all divisions and useful to OIT executives.
  - Everyone wins.

- The value of **Transparency** is a tough thing to prove.
  - Typically manifests itself as clients who don't know what's going on with their requests or projects.
  - Results in phone calls, emails, meetings, and other interruptions.
  - Allowing clients to follow up on their own empowers them and gets them back to work sooner.

- **Process Automation** is one of the most difficult promises to deliver on.
  - In many cases, existing processes are so casual that in collecting requirements we discover we have something WAY more complex than even the client believes.

How Does All That Help?

- Not Much From ITSM Strategy Perspective
- ITSM Awareness
- ITSM Vocabulary
- Automation Possibilities
- Familiarity with the Tools
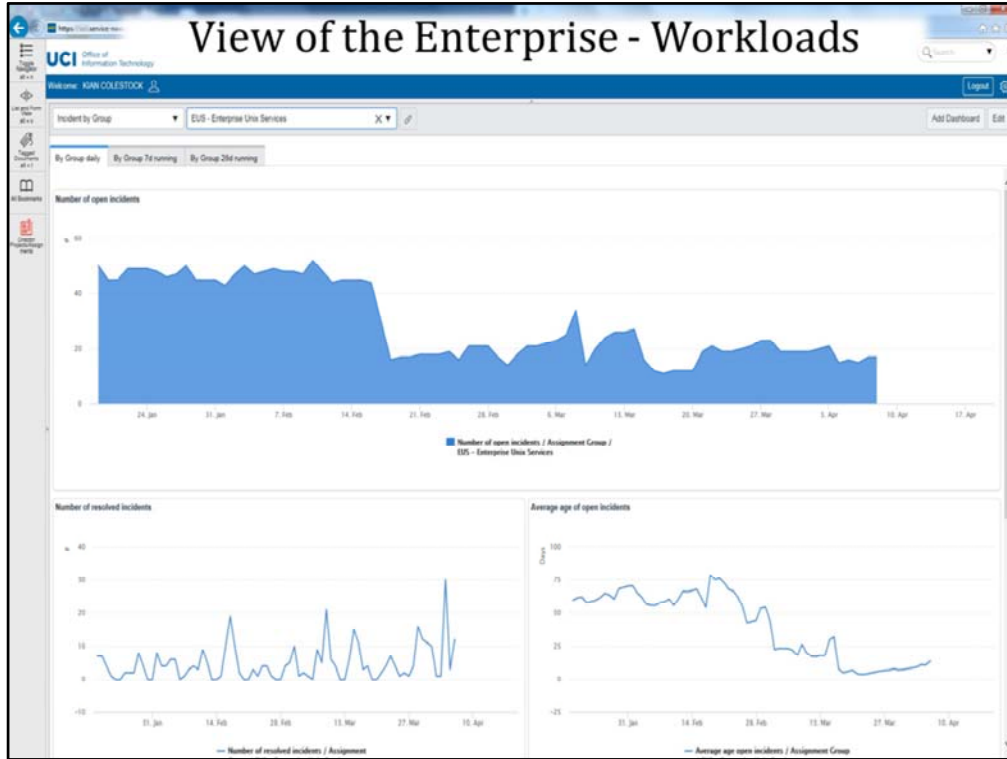- Improved Communication
- Setting the Stage

- None of this really does much in the way of implementing an ITSM "strategy"
- An ITSM Strategy must be carefully thought through and developed while considering, clients, resources, budgets, long-term campus goals, short term maintenance tasks, and a million other things.
- But our approach does:
    - Get people **speaking the same language**.
    - Make people wonder if there are other ways their **lives** could be **more streamlined**.
    - **Builds awareness** of the tools and underlying principles.
- OIT staff is now much more **aware** of **ITSM principles and practices**.
    - Heck, we even have a number of people who have obtained their ITSM Foundation certification!
- Staff is much more conversant in the **ITSM vocabulary**. Since we're starting to speak the same language:
    - We no longer get quizzical looks when we say things like ITIL, Client, KPI, Sponsor, or CMDB.
    - And we're getting there with **concepts** like **Continual Service Improvement, Relationship Management, and Demand Management**.
- In essence, we're now **Setting the Stage** for the *Really Big Deal* which is:
    - The creation of a legitimate ITSM Strategy followed by:
        - The creation of a plan to implement that strategy
- So, there's a lot of **ground work** being done here.
- When the time comes to formalize our overall ITSM strategy, we'll be in terrific shape.

So, What's the Payoff?

- Broad, standardized information for the enterprise.
- Different levels of detail for different audiences
- Institutional information is finally mapped and linked together with contextual purpose.
- Complex pieces of work are simplified.
- Work transparency and measurements become the standard for all service channels.
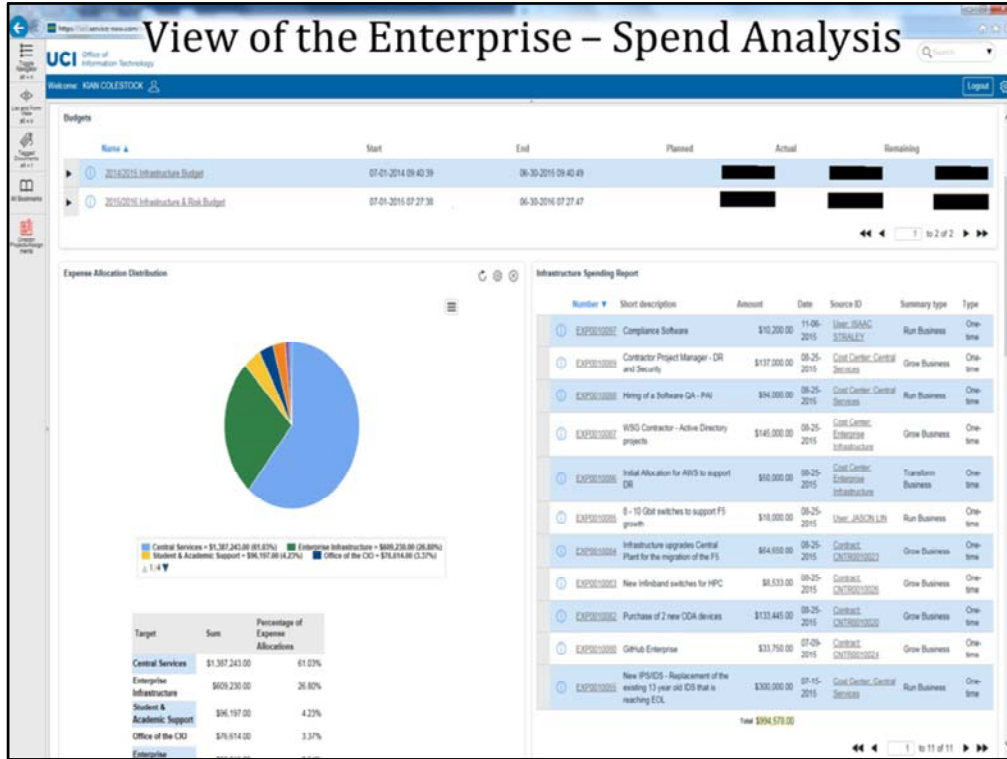- Speed and accuracy of decision making increases.

View of the Enterprise – Service Levels

View of the Enterprise - Projects

View of the Enterprise – Spend Analysis

- **What do you do when someone is reluctant to participate?**
  - Find out where the reluctance is coming from and try to address that.
  - Show some value (e.g., "If you do this, you won't have to write status reports anymore.")
- **Do you think everyone should be trained and certified in ITSM?**
  - Absolutely not. While it would be nice to have everyone singing from the same book, it's not a necessity and certainly not worth the investment.
  - We're dealing with professionals who are generally in the business for reasons other than ITSM.
  - People mostly get into IT because they want to write programs, deploy Web sites, build systems, etc. Hardly anyone chooses IT as a career so they can track metrics.
    It's far more productive to have people doing what they love to do insist that they learn some new skill they have no long-term interest in.
- **How would you do things differently if you knew then what you know now?**
  - I would definitely spend more time on requirements and especially on gap analysis.
  - We were so anxious to get going on this that we made the all too common mistake of believing the salespeople when they told us all we had to do was implement ServiceNow (or BMC Footprints) and our troubles would be over.
  - We were too quick to dismiss the concerns of some users that the new system wouldn't meet their needs.
  - I would also try harder to get executive buy-in before beginning. If the bosses

aren't convinced then the service providers won't be all that excited either.

- **Would you hire consultants if you had to do it all over again?**
    - Probably not.
    - I think we would focus harder on recruiting and developing experts internally.
    - This would jump-start the training process and get us our experienced users that much sooner.

Questions

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