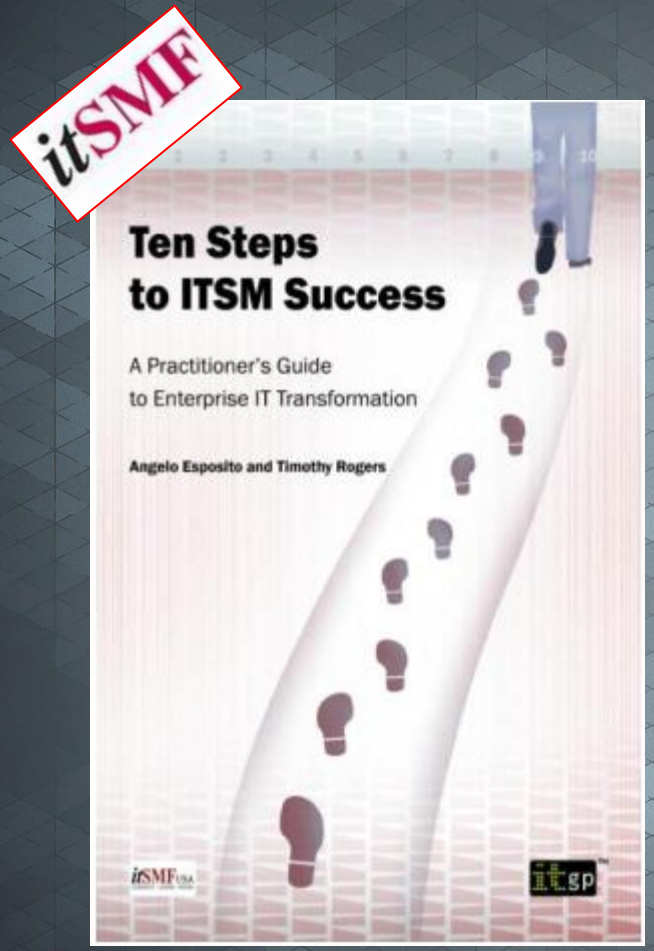
ITSM成功10步法

Ten-Steps-to-ITSM-Success

蓝采和

允许传播,但须保留著作权!



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OGC ITIL®

WHY WHAT WHO…

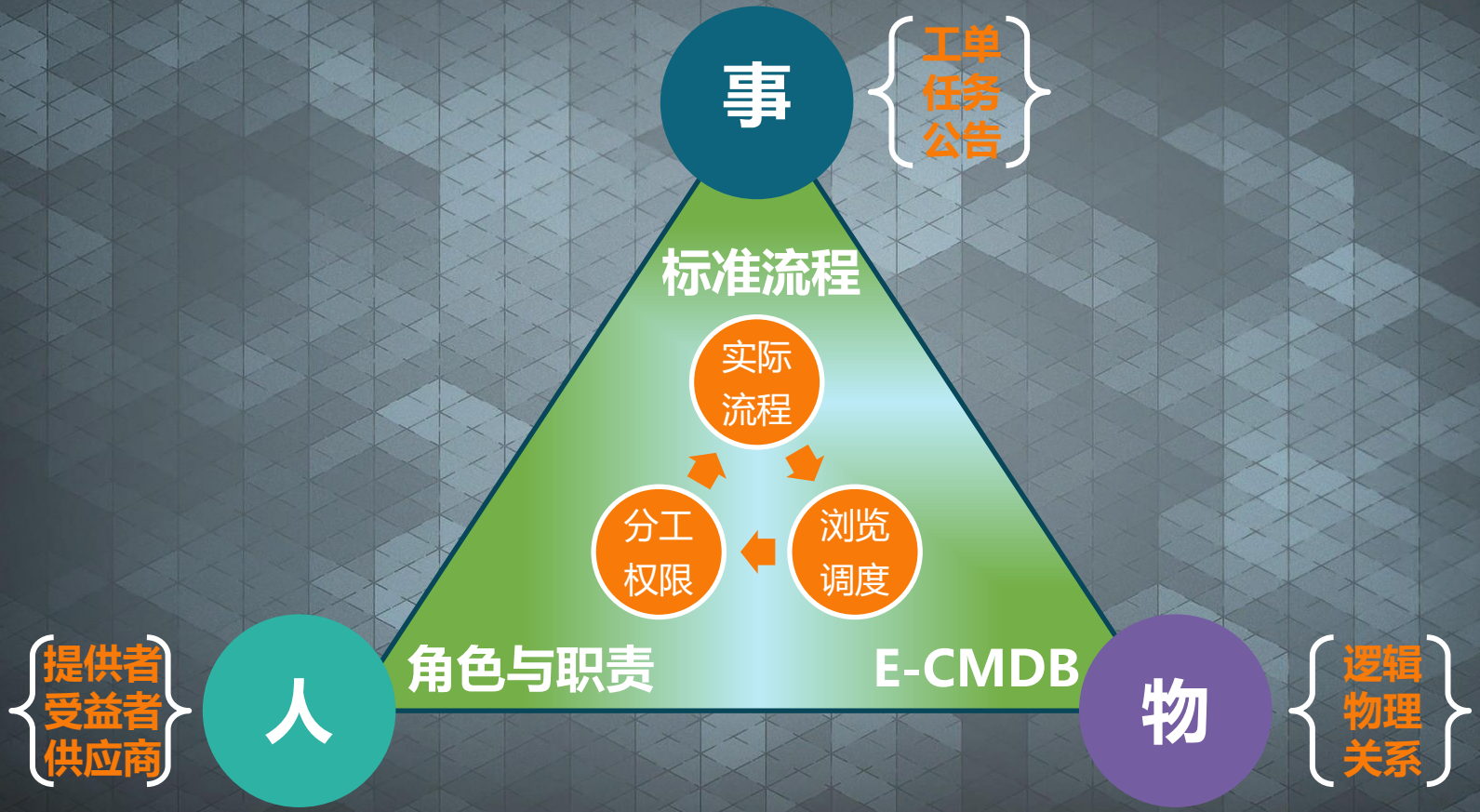
Why

跨越:从学术殿堂到社会实践

????®

HOW Do Action…

理论到实践的映射


事
工单
任务
公告
标准流程
实际
流程
浏览
调度
分工
权限
人
提供者
受益者
供应商
角色与职责
E-CMDB
物
逻辑
物理
关系

START
5.立目
6.战略
END
1.构图
4.搭台
7.R&R
10.CSI
2.盘点
3.验证
8.HLPD
9.AIO

1.构图

百老汇
Broadway

阻力重重

破|大势所趋

合适的时机

合适的引子

大致的计划

…

01

A.业务转型,发展IT服务业务。
B.业务暴涨,运维压力剧增.
.....

02

A.高昂的人力成本与低下的运维服务效率
B.新型业务系统提出前所未有的运维要求.....。

03

A.管理混乱,矛盾突出
B.出现重大运维事故
.....。

主动出击

立项的铺垫:

基础性的培训

必要沟通会议

多人积极参与

…

01 让更多的人了解ITSM

02 让人知道项目背景范围性质

03 沟通形成共识,获取认同与支持

计划书模板

ITSM服务规划模板

2盘点-变革

1	• Services cost money to provision.	IT is not free!
2	• Service provisioning costs must be known and documented (essential to service design, problem management, CSI, etc.)	Key driver for SLAs, investment decisions
3	• Service provisioning costs must be categorized and calculated in a manner the Business understands and agrees with.	IT is not the driver, not an attempt to 'ITILize'
4	• Costs can be allocated, charged or "shown back" using multiple methods (depending on the organization's needs)	First we have to know costs, then we can decide the method to handle them
5	• Agreed method for accounting, budgeting and charging IT costs must be documented and agreed by the Business and IT	'Friendly negotiations' – IT as partner, not cost center

Are these tenets acceptable?

服务关系梳理

- 组织
- 区域
- 服务
- 合同
- SLA
- 流程
- 表单

采和科技

供应商

IT服务合同

1	网络故障响应	30分钟之内响应 2小时解决
2	网络设备巡检	每周一次
3	桌面运维驻场	30分钟响应 4小时解决

八仙集团

客户

标准SLA:响应30分钟，解决90分钟

服务支撑团队

服务流程

服务工具

服务支撑文档

面对面沟通

盘点成果样例-服务成本分摊

IT Services	Labor		Software		Hardware		Hosting Services	Service Fees	IT Mgmt & Misc	Total Cost Indvidual Services	Percent of Total
	Internal	External	License	Maint	Equip	Maint					
Information Technology Infrastructure and Operations											
Directory Services & Email	510,390	55,000		51,924	14,333	41,693	263,000		68,017	1,004,357	52.52%
Phone/Phone Sys/Voicemail	250,294			29,837	3,583	22,437			24,489	330,640	17.29%
Conf Room Equip & Support		110,000		3,500					10,564	124,064	6.49%
Web/Voice/Video Conf (Ext)	44,067			24,366				350,000	34,937	453,370	23.71%
Communications	**804,751**	**165,000**	**0**	**109,627**	**17,916**	**64,130**	**263,000**	**350,000**	**138,007**	**1,912,431**	**9.16%**
WAN/LAN & Internet	487,691	30,000		133,300		88,000		608,400	128,815	1,476,206	47.70%
Wireless Telecomm Services				19,600				1,337,000	129,695	1,486,295	48.02%
Remote Access (Citrix / VPN)	10,134			44,647	7,187	873		32,400	9,103	104,344	3.37%
Telecommunications Services	25,571								2,445	28,016	0.91%
Telecommunications Services	**523,396**	**30,000**	**0**	**197,547**	**7,187**	**88,873**	**0**	**1,977,800**	**270,058**	**3,094,861**	**14.83%**
Desktop/Laptop H/W	335,222	165,000		65,480	1,200,250				117,022	1,882,974	72.48%
Desktop/Laptop S/W	32,304		165,000	22,300		36,074			22,177	277,855	10.69%
Personal Printers/Copiers		350,000			52,000				35,182	437,182	16.83%
End-User Computing	**367,526**	**515,000**	**165,000**	**87,780**	**1,252,250**	**36,074**	**0**	**0**	**174,381**	**2,598,011**	**12.45%**
Service Desk Operations	216,844	609,000		96,135	7,167	873			88,913	1,018,932	48.70%
Executive Support	354,411								24,323	378,734	18.10%
Event Support	102,823								9,830	112,653	5.38%
Site Support	332,724	180,000							49,018	561,742	26.85%
Service Desk & User Support	18,528								1,771	20,299	0.97%
Service Desk & User Support	**1,025,330**	**789,000**	**0**	**96,135**	**7,167**	**873**	**0**	**0**	**173,855**	**2,092,360**	**10.03%**
LiveLink	248,809	196,800		272,306	28,667	43,205			75,506	865,293	39.49%
SharePoint	223,445		65,033			121,000			16,323	425,801	19.43%
Content Management	601,589	132,000		26,290	28,667	33,421			78,009	899,976	41.07%
Enterprise Collaboration Services	**1,073,843**	**328,800**	**65,033**	**298,596**	**57,334**	**197,626**	**0**	**0**	**169,838**	**2,191,070**	**10.50%**
Retail Apps	1,523,260	515,500		318,583	25,083	55,668	375,000		185,479	2,998,573	52.37%
Financial Apps	1,173,351	75,000		391,854	21,500	9,021			159,345	1,830,071	31.96%
Internal Apps	455,918		15,000	323,535	3,583	29,159			69,522	896,717	15.66%
Applications	**3,152,529**	**590,500**	**15,000**	**1,033,972**	**50,166**	**93,848**	**375,000**	**0**	**414,346**	**5,725,361**	**27.44%**
Info Security/Risk Mgmt/DR	**687,017**	**384,200**	**30,000**	**134,400**	**14,333**	**1,747**	**35,000**	**0**	**123,012**	**1,409,709**	**6.76%**
Business Intelligence	**1,226,614**	**0**	**0**	**237,125**	**57,333**	**166,319**	**0**	**0**	**157,156**	**1,844,547**	**8.84%**
Totals	**8,861,006**	**2,802,500**	**275,033**	**2,195,182**	**1,463,686**	**649,490**	**673,000**	**2,327,800**	**1,620,653**	**20,868,350**	**100.00%**

盘点的成果

盘点成果

1. 资源需求
2. 交付及标准
3. 利益相关者
4. 流程信息
5. 业务对接情况
6. 服务成本量化
7.与期望的差距

3.验证-找谁

用户

客服　业务经理　工程师

部门经理　IT经理　财务人员　管理人员

3.验证-内容及方式

多渠道采集

尽可能面对面直接沟通

单独沟通是最常见方式

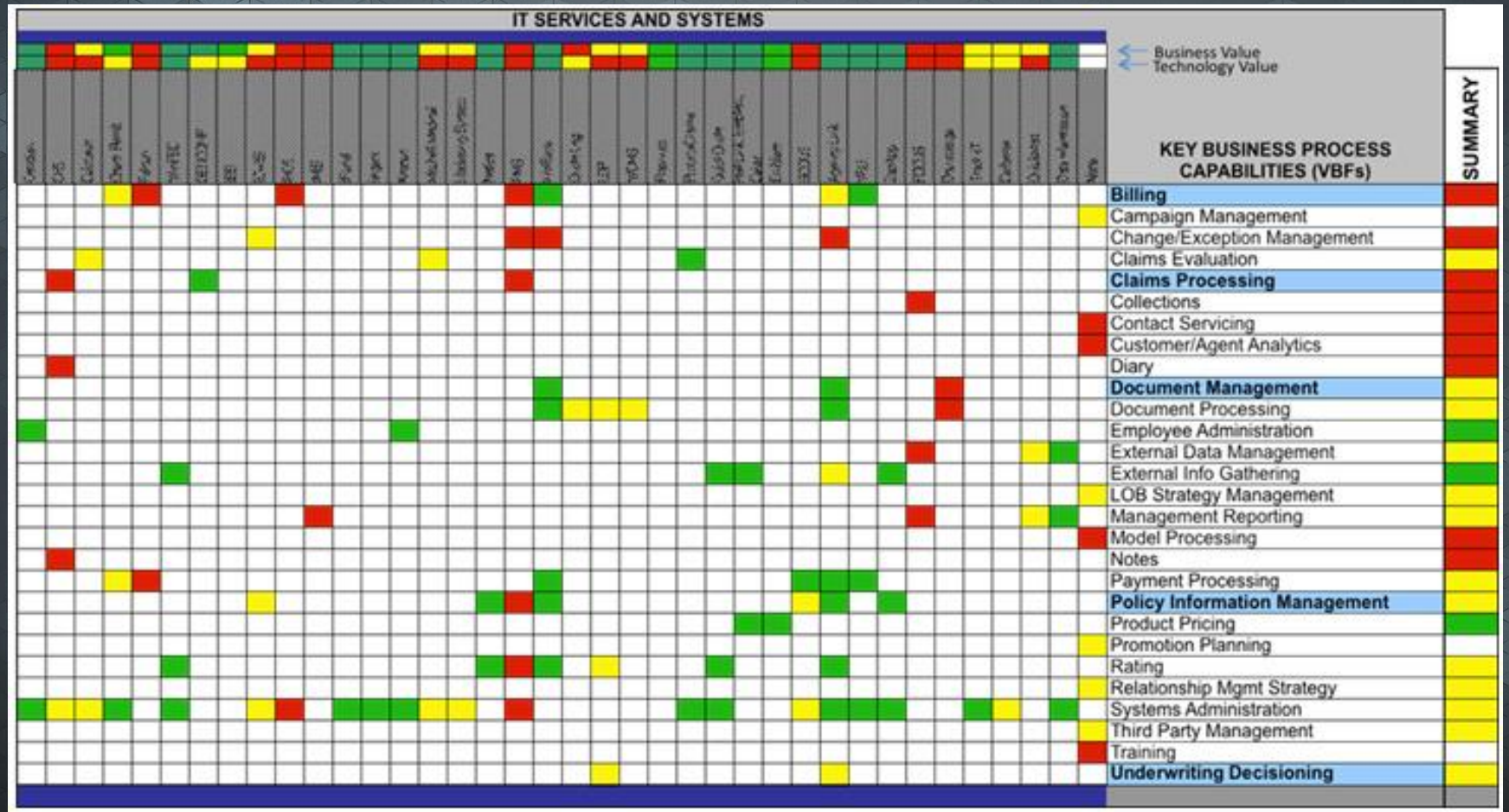
01 服务的优先级

02 工作IT服务需求

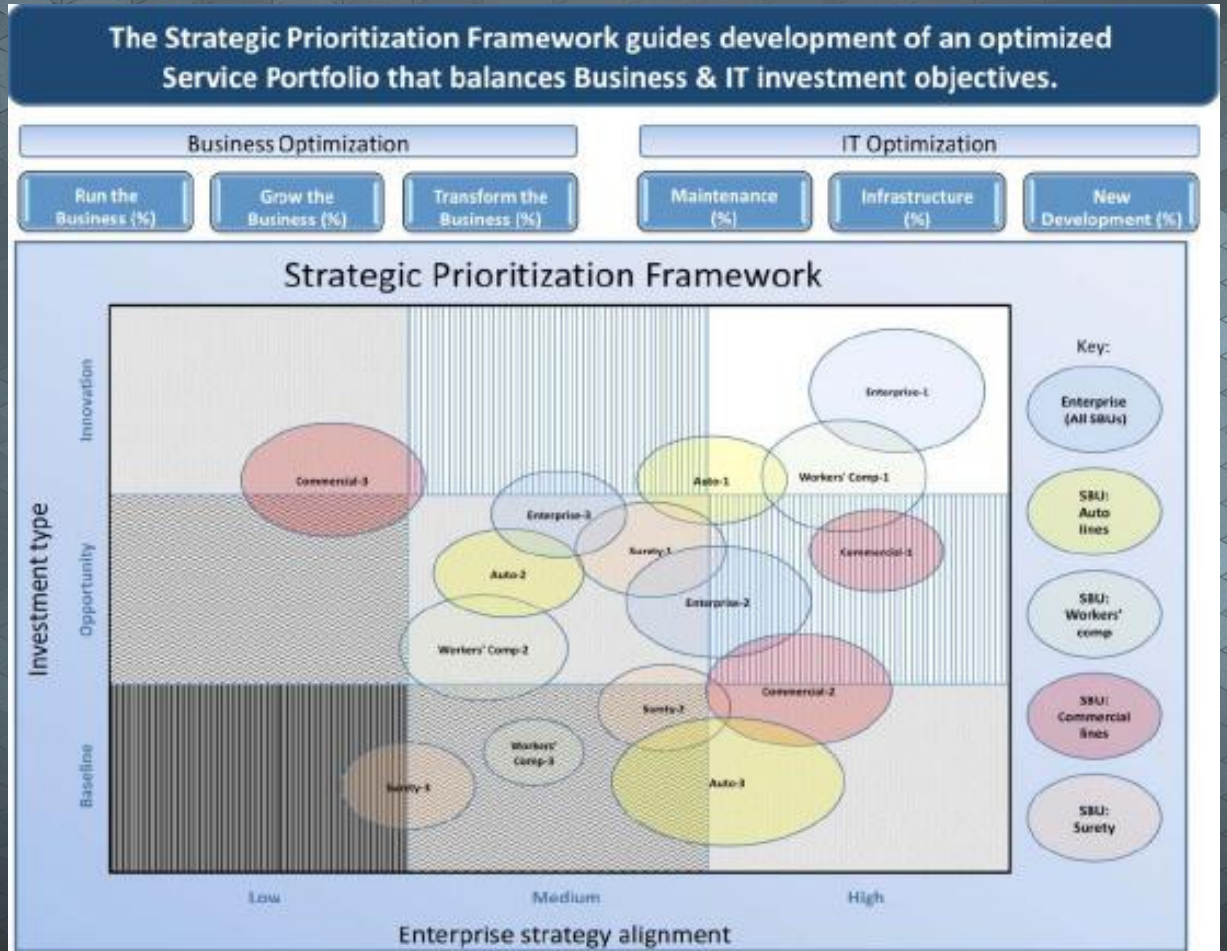
03 技术人员成本...

04 关键矛盾冲突点

服务整理之企业IT服务热图



投资优先级框架


The Strategic Prioritization Framework guides development of an optimized Service Portfolio that balances Business & IT investment objectives.
Business Optimization
IT Optimization
Run the Business (%)
Grow the Business (%)
Transform the Business (%)
Maintenance (%)
Infrastructure (%)
New Development (%)
Strategic Prioritization Framework
Investment type
Innovation
Opportunity
Baseline
Enterprise-1
Commercial-3
Auto-1
Workers' Comp-1
Enterprise-3
Surety-1
Commercial-1
Auto-2
Enterprise-2
Workers' Comp-2
Commercial-2
Surety-2
Workers' Comp-3
Surety-3
Auto-3
Key:
Enterprise (All SBUs)
SBU: Auto lines
SBU: Workers' comp
SBU: Commercial lines
SBU: Surety
Low
Medium
High
Enterprise strategy alignment

3.验证回顾

1.识别职能领域及利益相关者

2.与关键用户共同梳理需求

3.尽可能面对面会谈

4.记录品质关键点

5.服务热图|地图

6.讨论服务成本的权衡点

4 搭台

ITSM 工作组

1.覆盖:全业务全职能,跨业务职能,从IT 到业务,财务……

2.编写机构章程……

3.定义机构日常活动运作程序……

4.明确日常工作具体的原则,如否决,或者升级……

5.内部|外部一致认可……

6.定义it服务的业务系统及主要流程……

7.关键功能和角色冲突的处理机制……

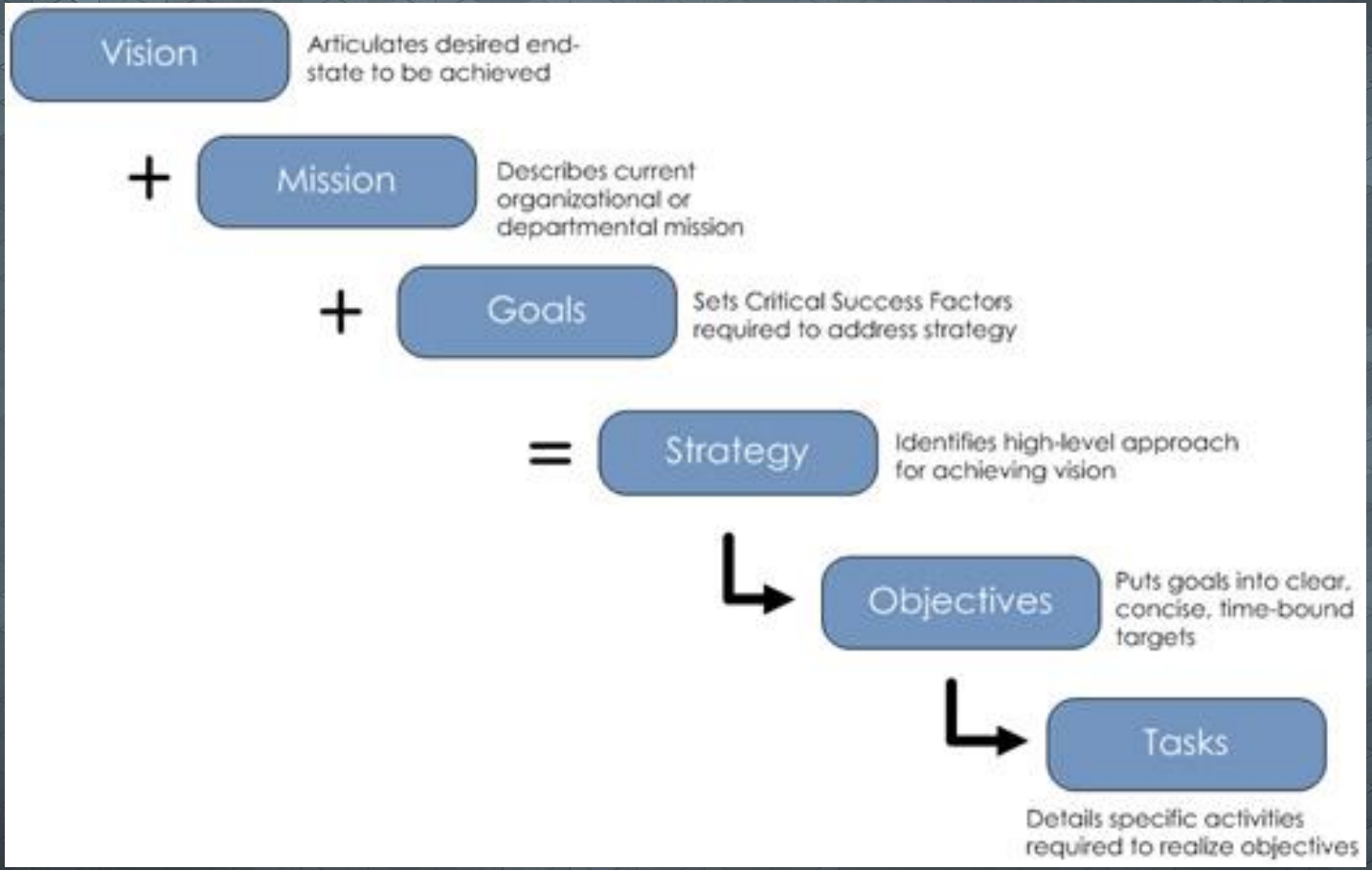
8.业务服务优先级划分,改进方向……

9.设定每个阶段完成时限和设定交付物……

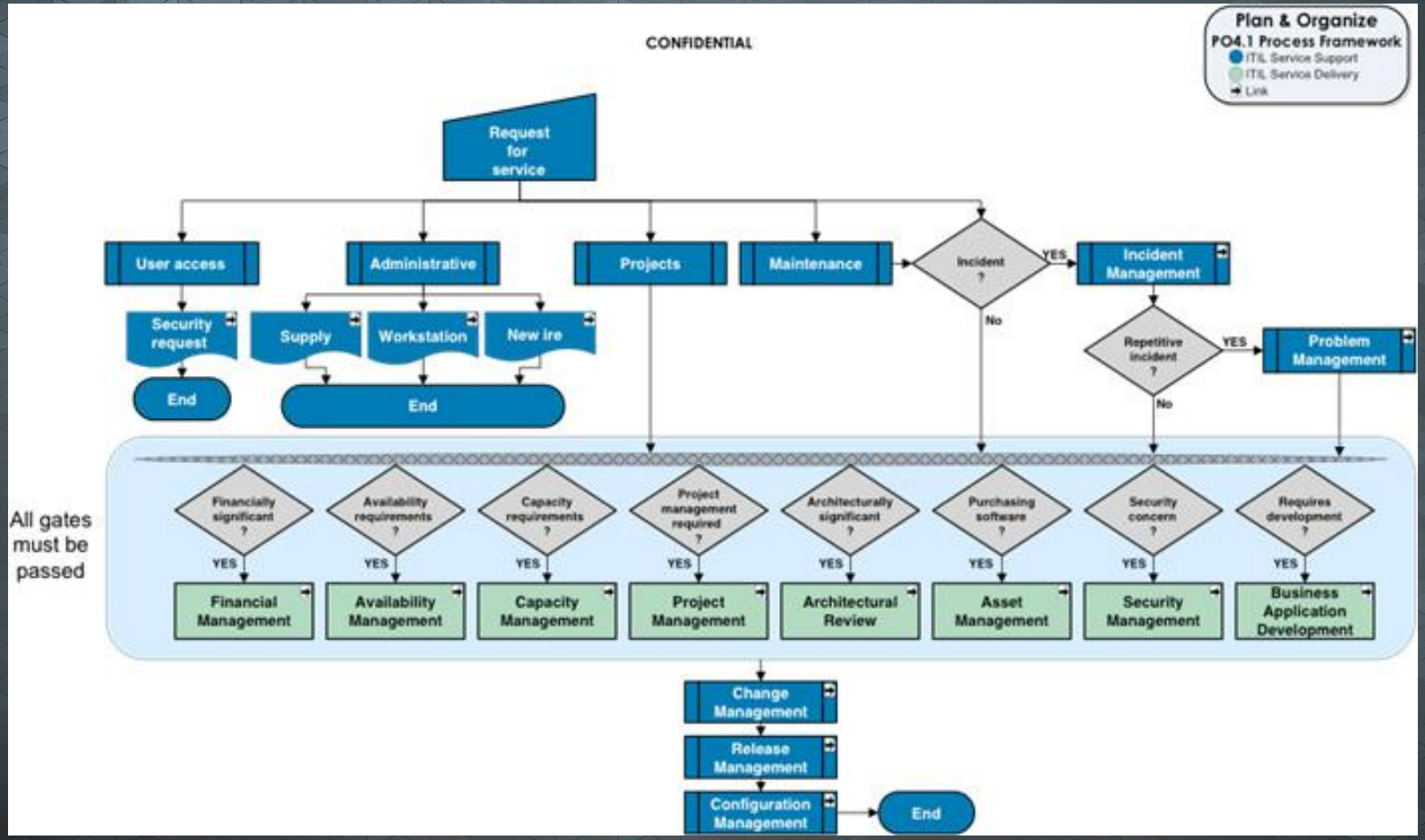
10.熔断|解散机制,定期评估,或未实现预期目标……

4.章程关键点|定义

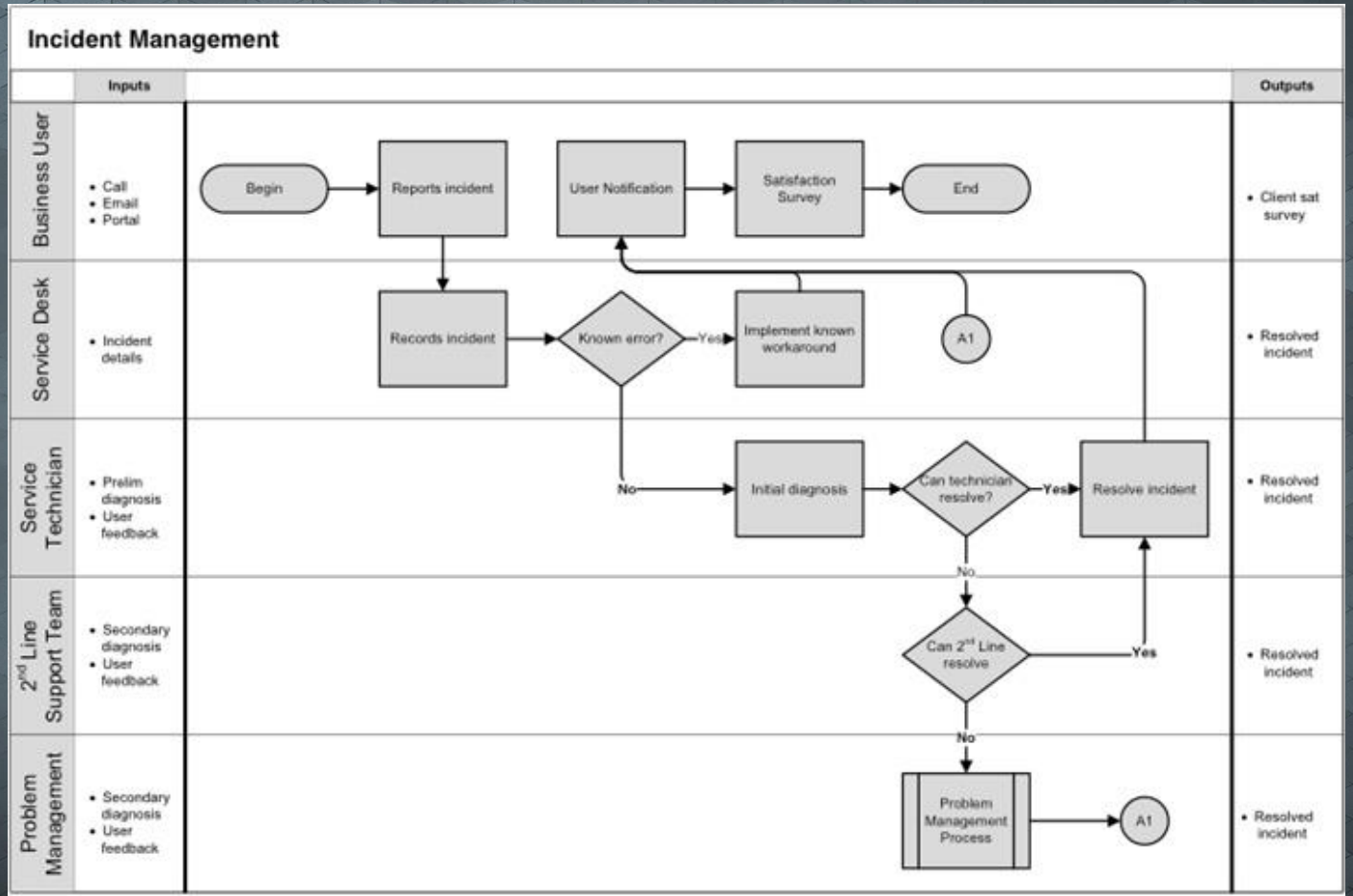
5战略[目标]”元素”


Vision
Articulates desired end-state to be achieved
+
Mission
Describes current organizational or departmental mission
+
Goals
Sets Critical Success Factors required to address strategy
=
Strategy
Identifies high-level approach for achieving vision
Objectives
Puts goals into clear, concise, time-bound targets
Tasks
Details specific activities required to realize objectives

IT系统生态图


CONFIDENTIAL
Plan & Organize
PO4.1 Process Framework
ITIL Service Support
ITIL Service Delivery
Link
Request for service
User access
Administrative
Projects
Maintenance
Incident ?
YES
Incident Management
No
Security request
Supply
Workstation
New ire
End
End
Repetitive incident ?
YES
Problem Management
No
All gates must be passed
Financially significant ?
Availability requirements ?
Capacity requirements ?
Project management required ?
Architecturally significant ?
Purchasing software ?
Security concern ?
Requires development ?
YES
Financial Management
Availability Management
Capacity Management
Project Management
Architectural Review
Asset Management
Security Management
Business Application Development
Change Management
Release Management
Configuration Management
End

流程图示例


Incident Management
Inputs
Outputs
Business User
• Call
• Email
• Portal
Begin
Reports incident
User Notification
Satisfaction Survey
End
• Client sat survey
Service Desk
• Incident details
Records incident
Known error?
Yes
Implement known workaround
A1
• Resolved incident
Service Technician
• Prelim diagnosis
• User feedback
No
Initial diagnosis
Can technician resolve?
Yes
Resolve incident
• Resolved incident
2nd Line Support Team
• Secondary diagnosis
• User feedback
No
Can 2nd Line resolve
Yes
• Resolved incident
Problem Management
• Secondary diagnosis
• User feedback
No
Problem Management Process
A1
• Resolved incident

5.目标总结

- 愿景与使命
- 战略目标
- 战略计划
- 现实目标
- 计划任务
- 系统生态
- 验证策略

6 典型[战略]因素

战略
1.愿景使命
2.外部环境
3.行业环境
4.内部分析
6.组织文化
7.资源结构
8.财务分析
9.Swot
10.战略方向
11.行动计划

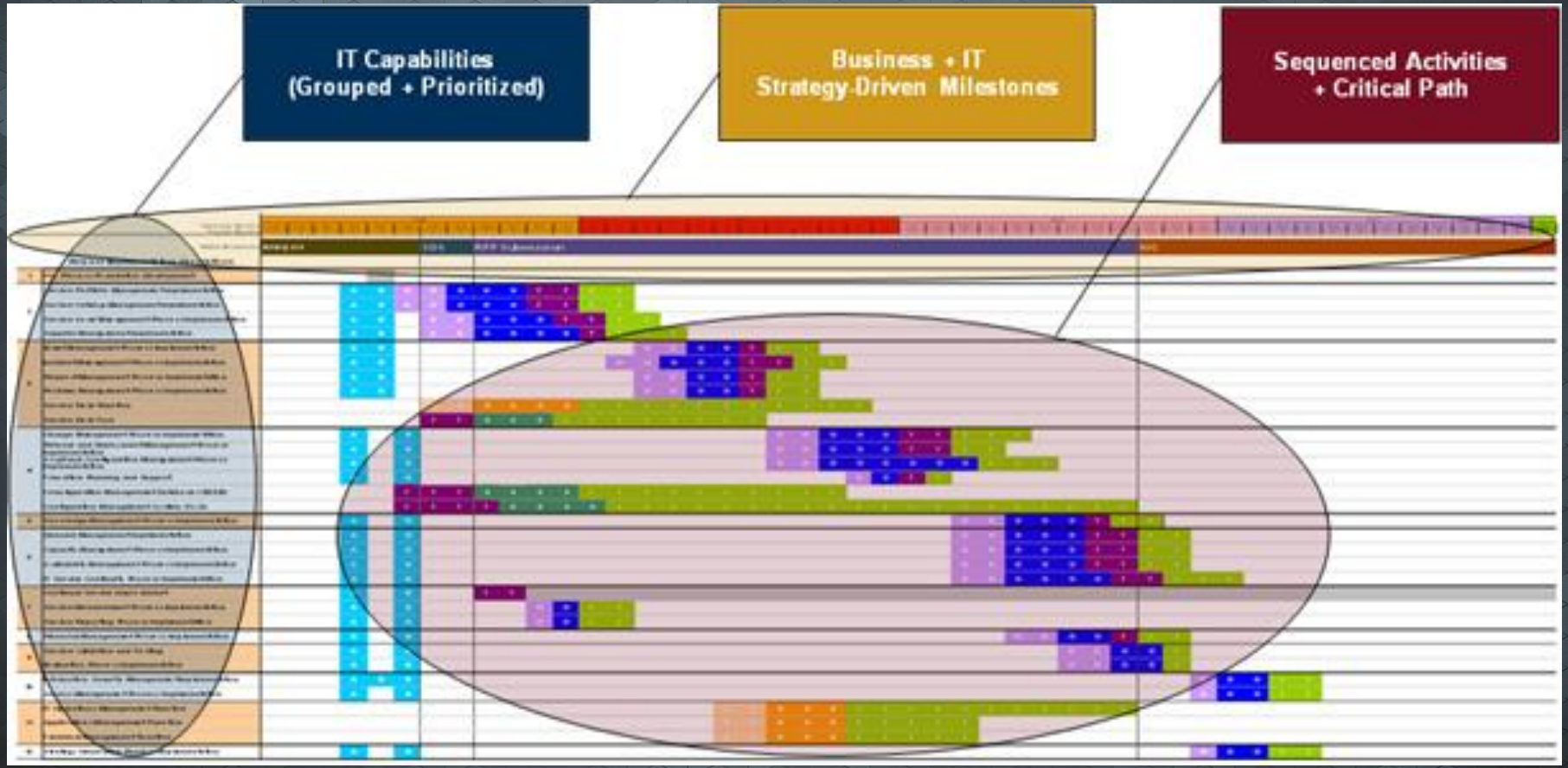
IT与业务映射

IT goals linked tobusiness goals

ID	IT strategic goals
1	Establish enterprise-wide Vendor Management Process.
2	Identify all third-party suppliers and outstanding contractual obligations.
3	Account for and protect all IT assets.
4	Increase security of customer-facing web services.
5	Maintain integrity and accuracy of received client data, and PII.
6	Ensure compliance with laws, regulations, and contractual obligations.

ID	Business strategic goals	Corresponding IT goals			
1	Provide secure website services for customer order submission.	3	4	5	
2	Reduce costs to outside contractors / consultants.	1	2		
3	Comply with federal and state regulations relating to personally identifiable information (PII).	3	4	5	6

ITSM Transformation Roadmap



6[战略]总结

服务优先级	权衡服务需求	发布战略研讨	形成战略计划
组建目标矩阵	重点方案计划	传递战略计划	制定项目计划

7.BRD0

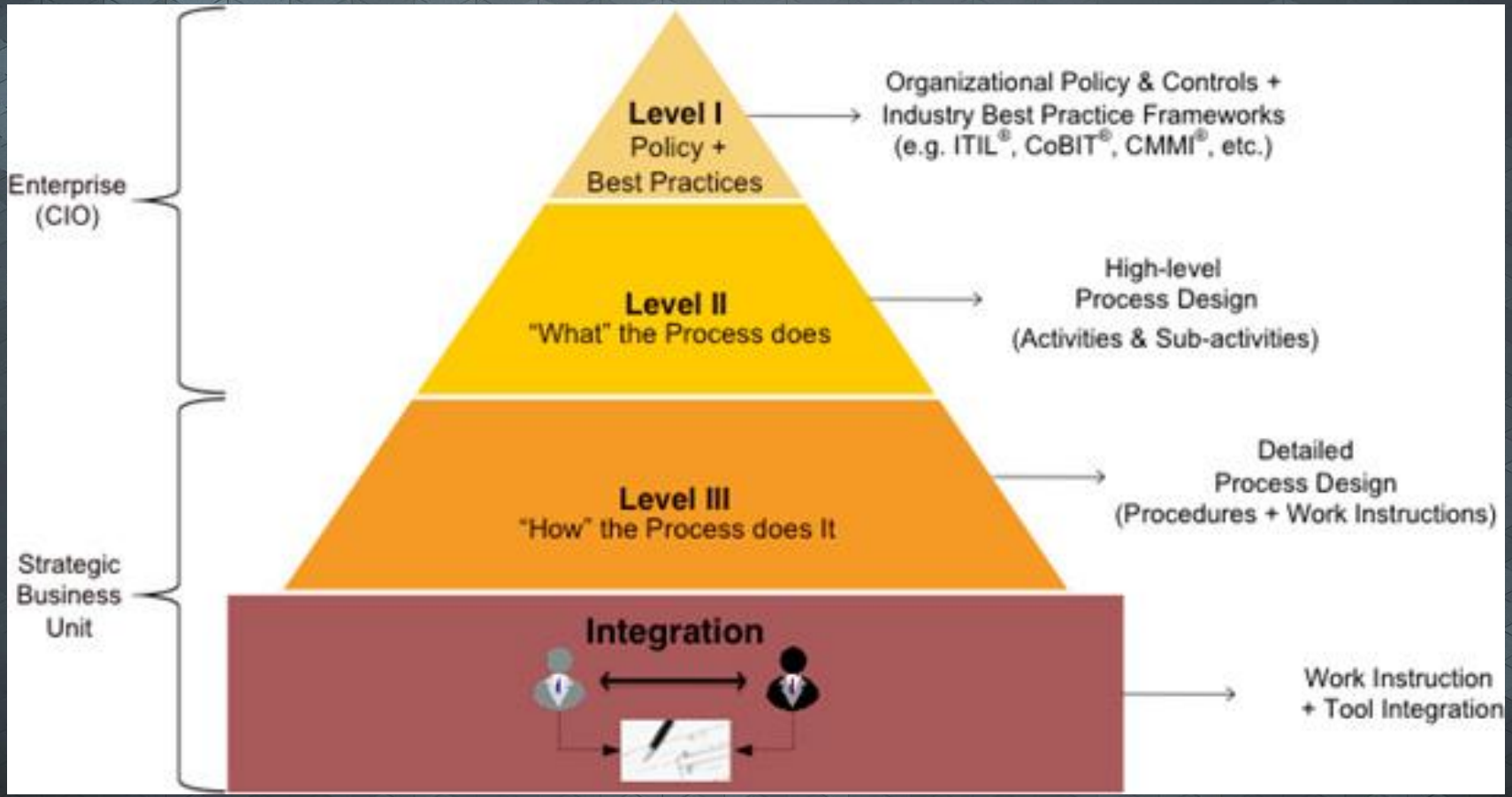
KEY: R = Responsible A = Accountable C = Consulted I = Informed	Board of Directors	Executive Committee	CIO	ITSM Steering Committee	Architecture Review Board	Change Advisory Board	Service Owner Council	Service Owner	Business Relationship Manager	Process Owner Council	Process Owner	Process Manager	Strategic Business Unit-1	Strategic Business Unit-2	Strategic Business Unit-3
ENTERPRISE															
Services															
1.0 Activity ABC. . .															
2.0 Activity XYZ. . .															
Processes															
3.0 Activity ABC. . .															
4.0 Activity XYZ. . .															
Capabilities															
5.0 Activity ABC. . .															
6.0 Activity XYZ. . .															

R/A/C/I

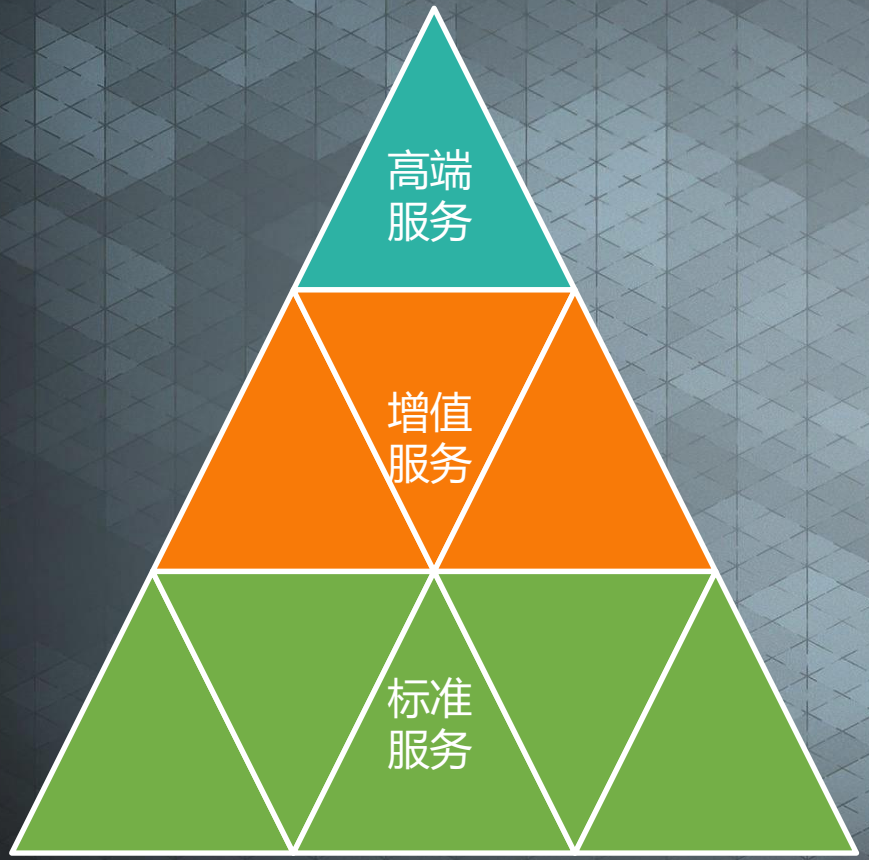
角色与职责-->数据权限 系统权限

平凡而伟大的基础工作!

8.HLPD|BRD1


Enterprise
(CIO)
Strategic
Business
Unit
Level I
Policy +
Best Practices
Organizational Policy & Controls +
Industry Best Practice Frameworks
(e.g. ITIL®, CoBIT®, CMMI®, etc.)
Level II
"What" the Process does
High-level
Process Design
(Activities & Sub-activities)
Level III
"How" the Process does It
Detailed
Process Design
(Procedures + Work Instructions)
Integration
Work Instruction
+ Tool Integration

服务规划



服务级别:高|中|基础

服务合同:客户档案 服务需求 服务计费

服务目录:公开服务内部服务 服务工具

服务运营:服务水平运营协议

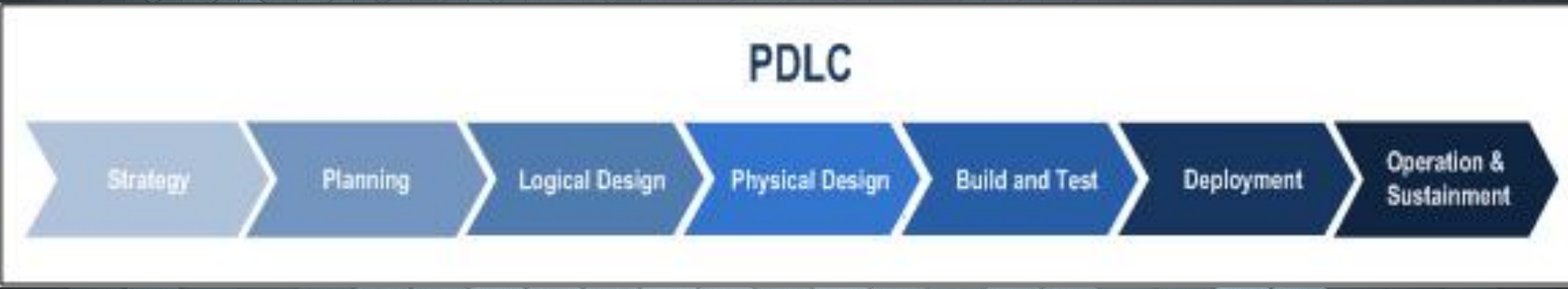
合作伙伴和供应商关系:支(撑)持合同

流程规划

当前状态	过程状态	流程模型
过程规则	流程控制	流程指标
流程角色和职责	流程操作程序	流程自动化工具需求
流程测试	流程导入	绩效质量

8总结

9 All In One



ITSM 1

ITIL+COBIT+TOGAF....

软件工程 2

需求分析+产品设计+软件质量+系统部署

项目管理 3

项目范围,进度,风险,质量.....

10.CSI

获取服务运营数据

+

分析服务运营数据

+

执行服务优化动作

ITSM经济学

成本/效益
完全分享
完全分享资源
按需核算用户成本
有限共享
有效共享资源
约定分摊用户成本
专有服务
专用资源
固定用户成本
复杂/难度

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