knowledge16

Experience the Service Revolution



Service Portfolio, Service Catalog, and Requests
The What, The How, and The Why

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Agenda

About Duke

Contrasting the Service Portfolio and the Service Catalog

Service Portfolio

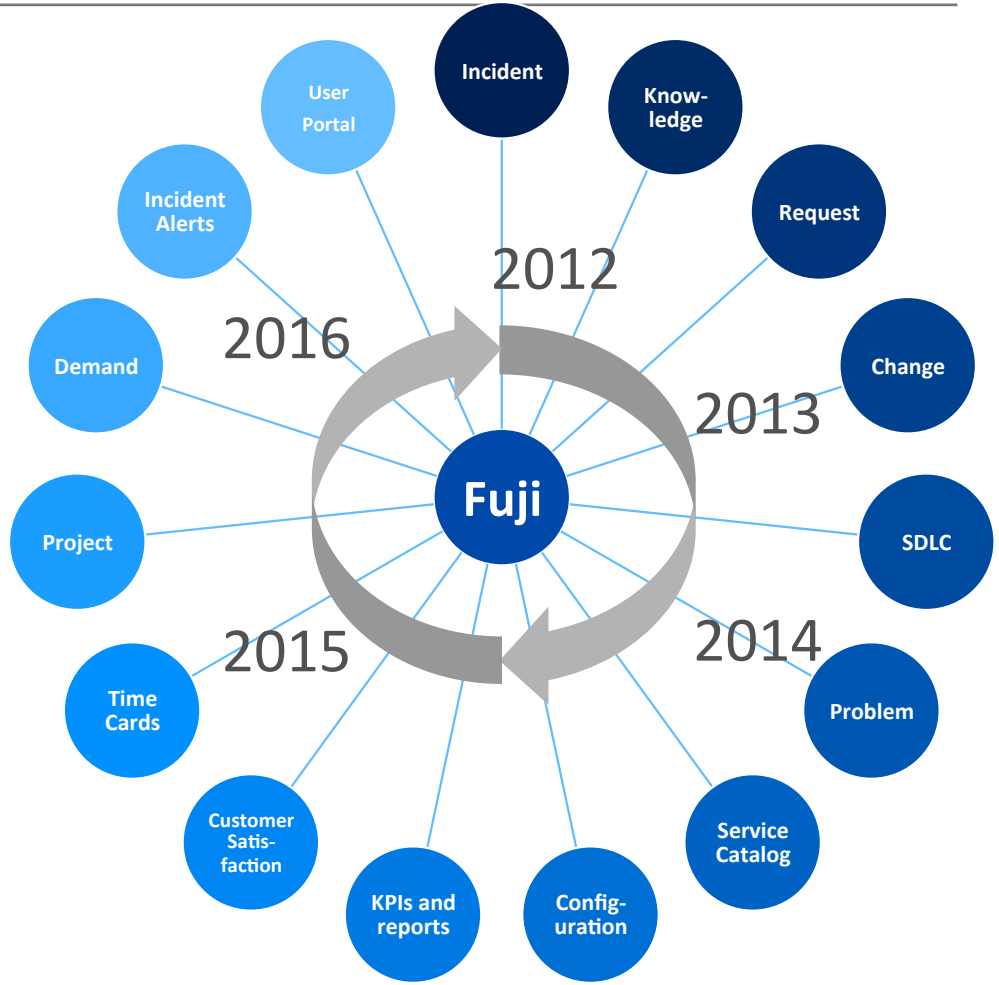
Service Catalog

Futures for Service Portfolio and Service Catalog at Duke

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Duke Health

- Academic medical institution ~35,000 faculty & staff
  - Patient care
  - Education
  - Research
- Large, complex organization
- Type II Service Provider: Duke Health Technical Services
  - 800+ staff
  - near 100% ITIL trained & certified
- Type I Service Providers: Some in Duke Health.
- ServiceNow customer since 2012
  - Share an instance with Duke University - essentially a completely different organization



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Service Portfolio

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Contrasting the Service Portfolio and Service Catalog



Service Portfolio

- Defines IT, infrastructure, and supporting services and what is included in those services.
- The Service Portfolio represents a complete list of the services managed by the service provider.
- Some of these services are visible to the customers while others are not (Enabling Services).
- Duke has implemented Active Services only.
- Services are clustered according to Lines of Service (categories) based on common business activities they support.

- Target Audience: Customer



Service Catalog

- Where end users submit requests for
  - new services,
  - changes to existing services, or
  - to discontinue service
- Service Requests
  - trigger workflows,
  - may require approvals
  - can drive multiple parallel work streams
  - Can update artifacts in ServiceNow such as Configuration Items and Assets.

- Target Audience: User

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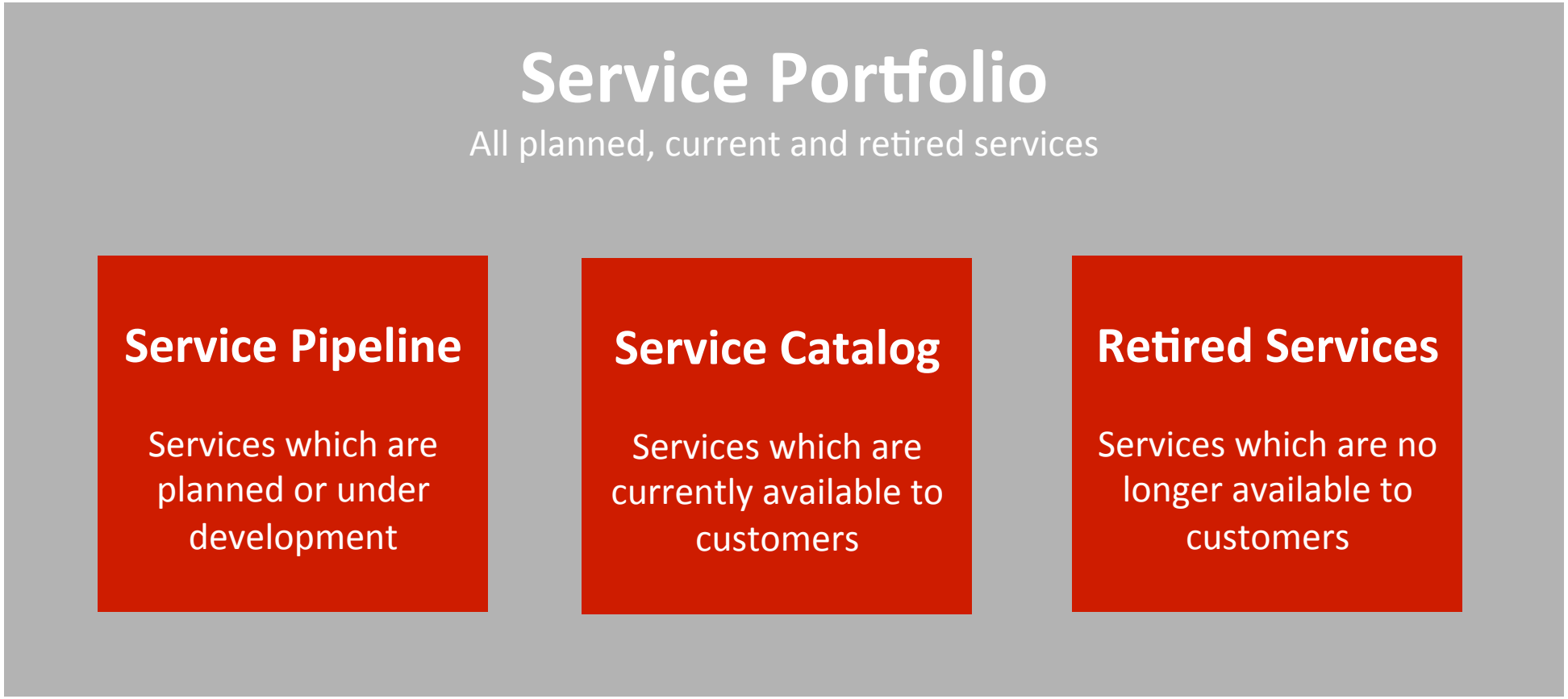
Service Portfolio

Service Catalog

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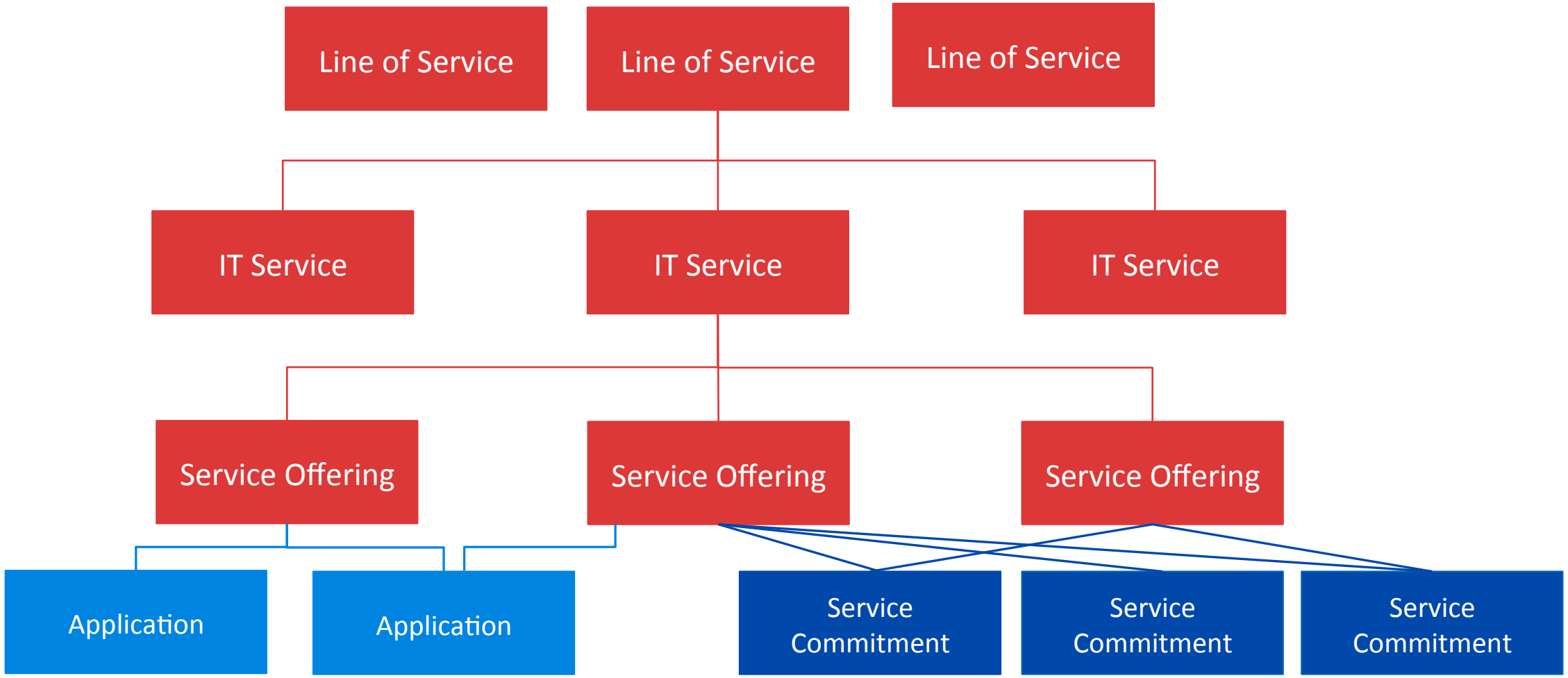
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ITIL Service Portfolio



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Duke's Service Portfolio Structure



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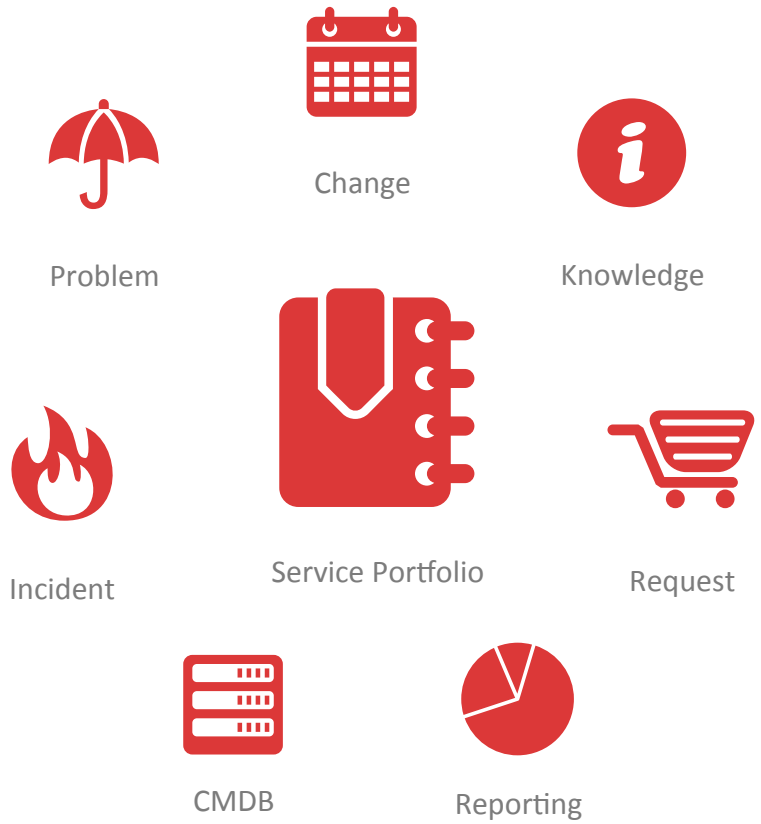
Service Portfolio attributes

- Your Service Portfolio must be
  - Customer centric
    - Structured in a way that is meaningful to your customer
  - Technology agnostic
    - It will not change as each new technology emerges and fades
  - Aligned to Business functions and capabilities
    - Not Organizationally aligned

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What is the value of a Service Portfolio?

- Move emphasis from internal organization on to the customer.
  - End to end delivery of service vs individual team performance
- Move accountability onto service owners
  - Identify gaps of ownership
- Foundation of service management
  - All processes are connected to the portfolio
- Reporting
  - From 1,000s of “CIs” and assignment groups to 65 services
- Service based costing
  - Seamless alignment across customer/finance/IT



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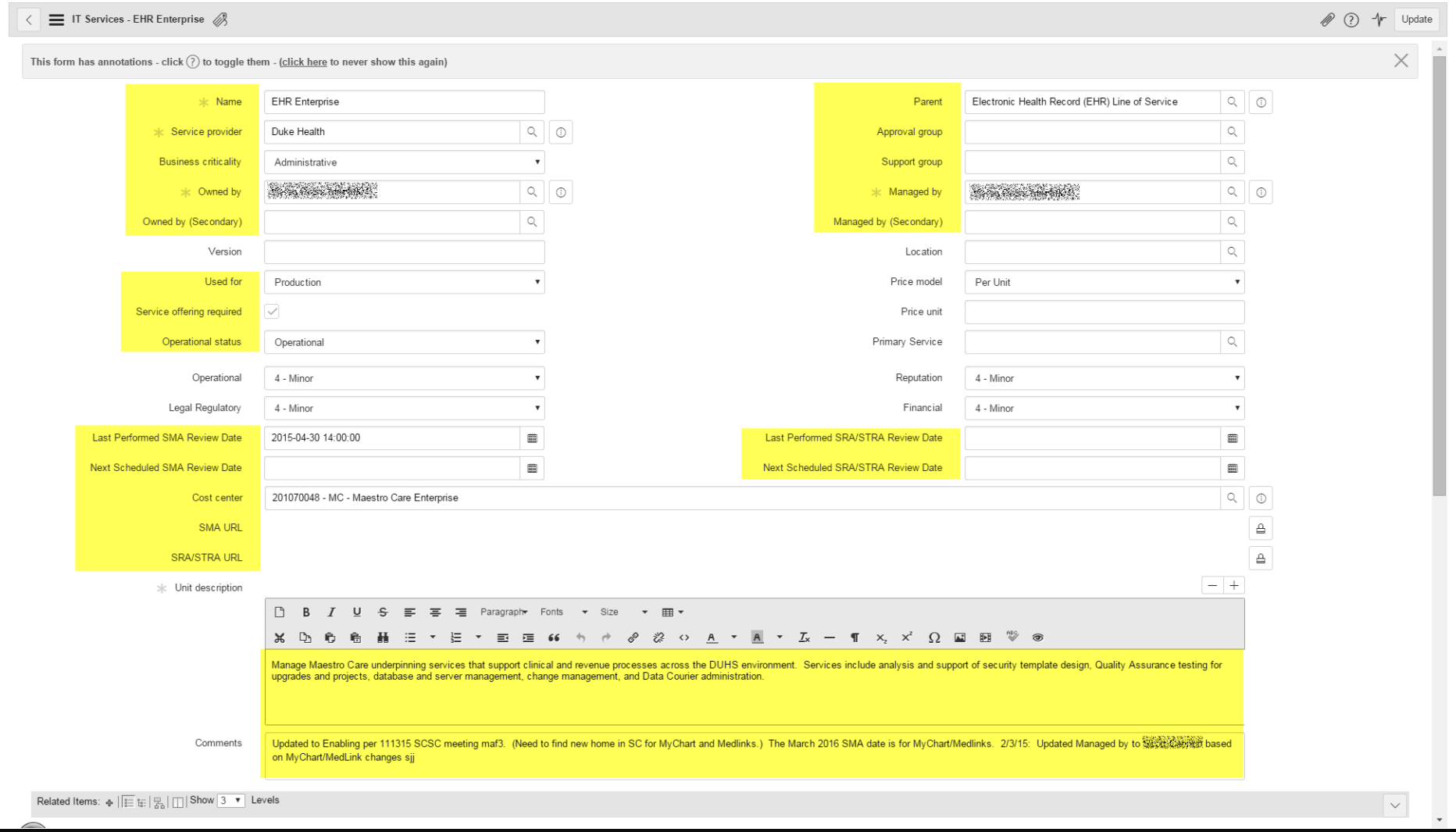
Portfolio example

Line of Service	IT Service	Service Offering
Clinical Applications	Image Management Apps	
Clinical Engineering	Cardiology Applications	
Custom Application Support	Home Care Applications	
Data Center	Pharmacy Applications	Compounding
Device Support	Inpatient Applications	Inventory
Engineering	Laboratory Applications	Dispensing
Database	Ambulatory Applications	
Enterprise Business Apps		
Enterprise Information Management		
Network Services		

Source: Duke Health Service catalog

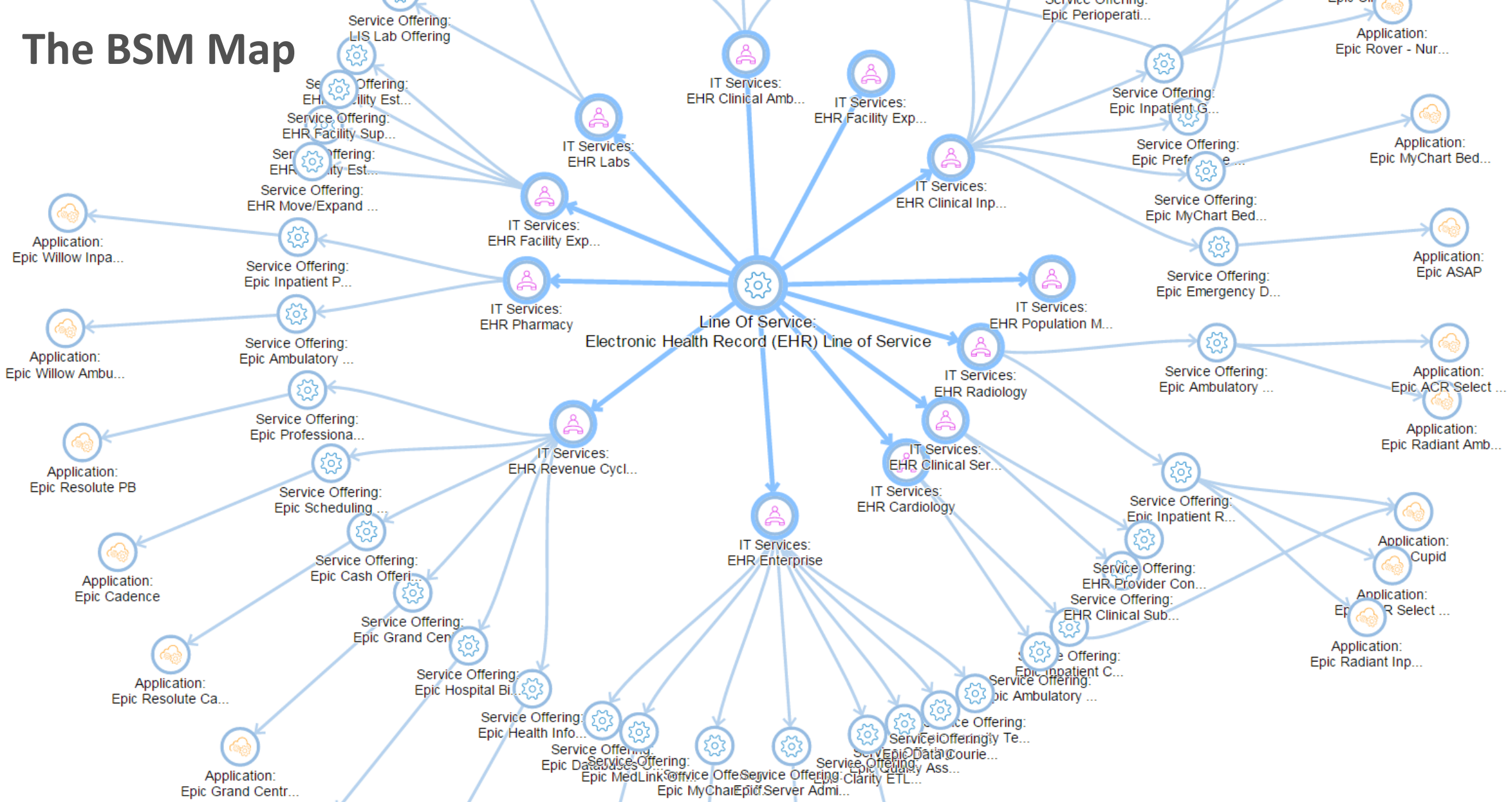
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IT Service Implementation



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The BSM Map

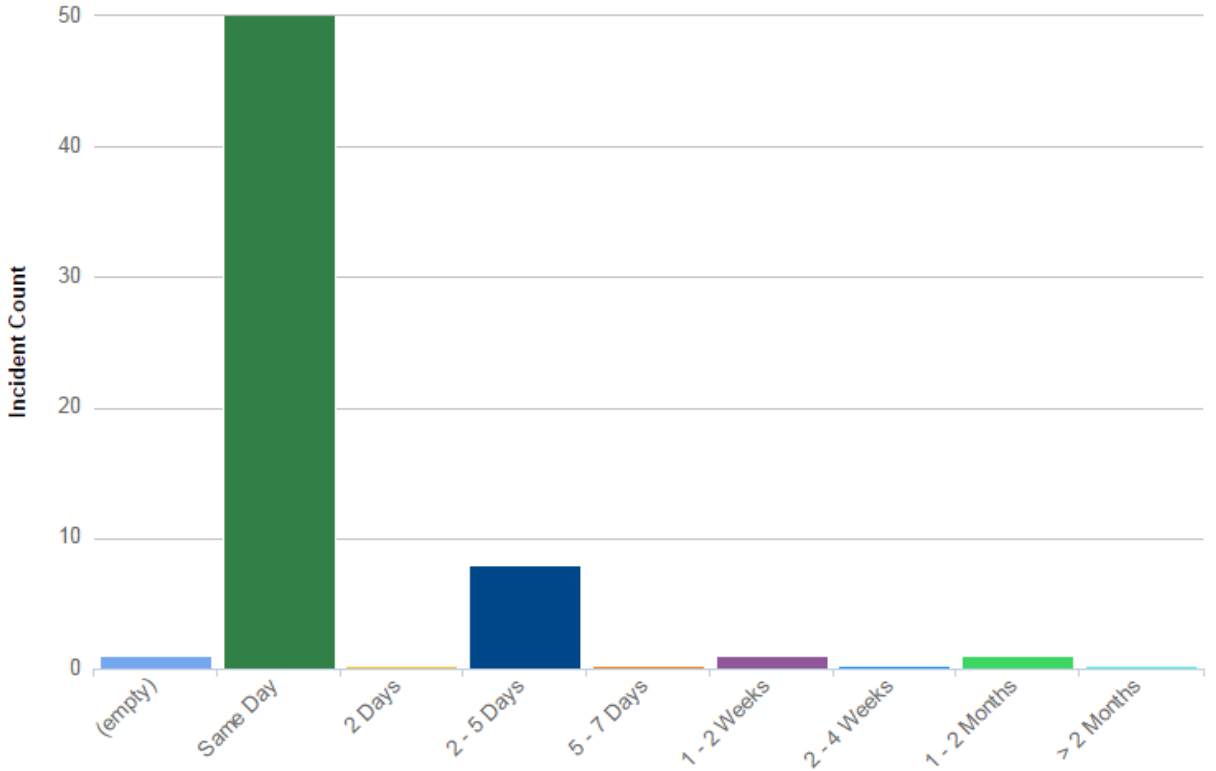


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Reporting By Service - Before

All of these conditions must be met

Created	between	Last 6 months	and	Today
Configuration item	is	Website		
or Configuration item	is	Drupal		
or Configuration item	is	DreamWeaver		
or Configuration item	is	Duke Cancer Institute Websi		
or Configuration item	is	Duke Creative Services Web		
or Configuration item	is	Duke DHTS Web Services V		
or Configuration item	is	Duke Executive Health Webs		
or Configuration item	is	Duke Medicine Branding Wel		
or Configuration item	is	Duke Nursing Website		
or Configuration item	is	Duke Quality Imaging Standa		
or Configuration item	is	Duke Today		
or Configuration item	is	dukehealth.org		
or Configuration item	is	dukechildrens.org		
or Configuration item	is	dukecreative.org		
or Configuration item	is	dukeeye.org		
or Configuration item	is	dukefertility.org		
or Configuration item	is	dukeheartcenter.org		
or Configuration item	is	dukeintegrativemedicine.org		
or Configuration item	is	dukemedicine.org		
or Configuration item	is	dukepersonalizedmedicine.or		
or Configuration item	is	dukeraleighospital.org		
Configuration item	does not contain	OIT		
Configuration item	does not contain	SharePoint		
Configuration item	does not contain	Duke HR Website		
Configuration item	does not contain	Emergency Web Site		
Configuration item.Operational status	is	Operational		

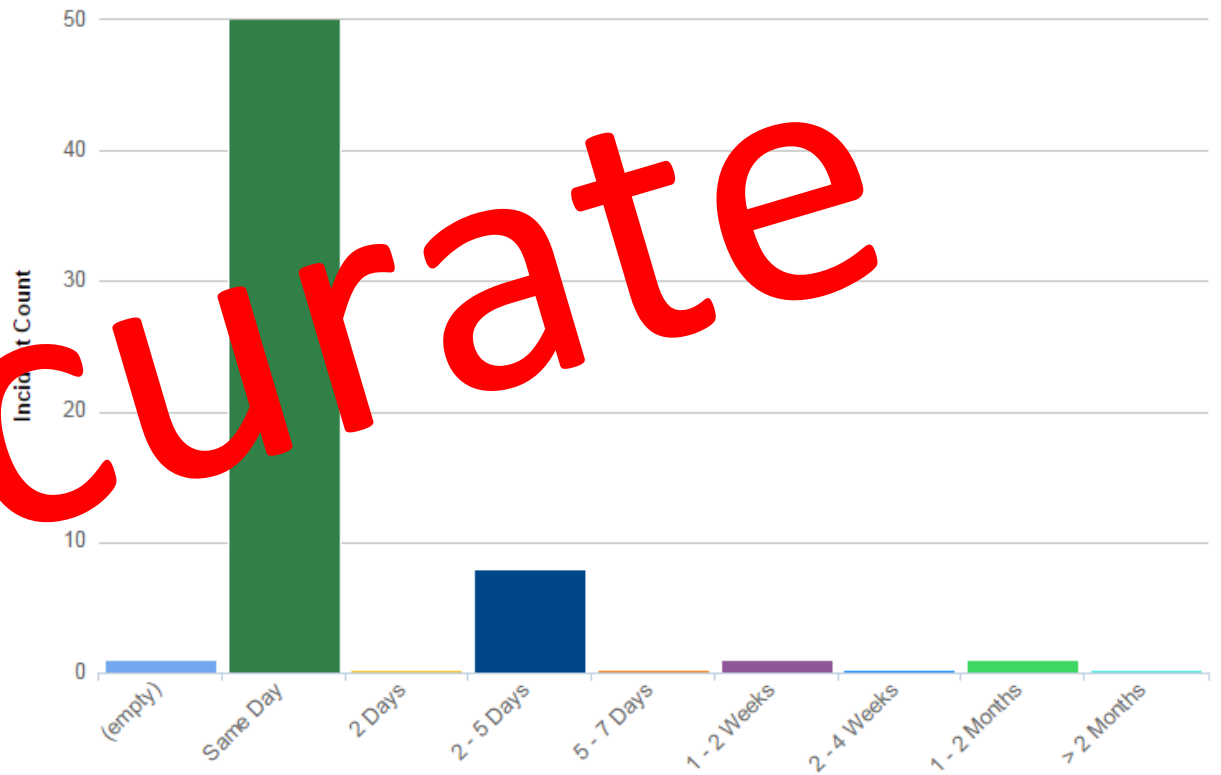


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Reporting By Service - Before

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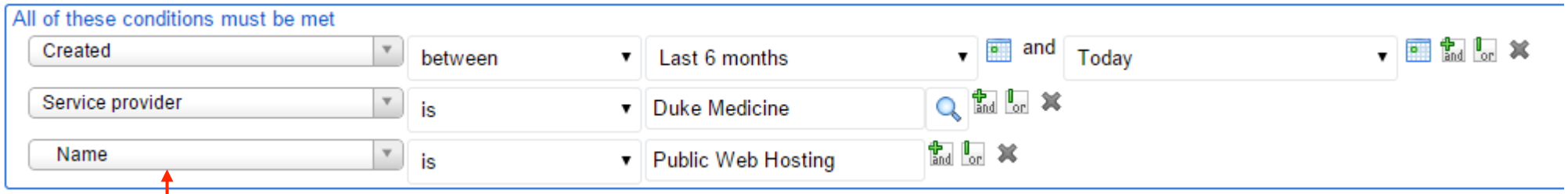
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Inaccurate

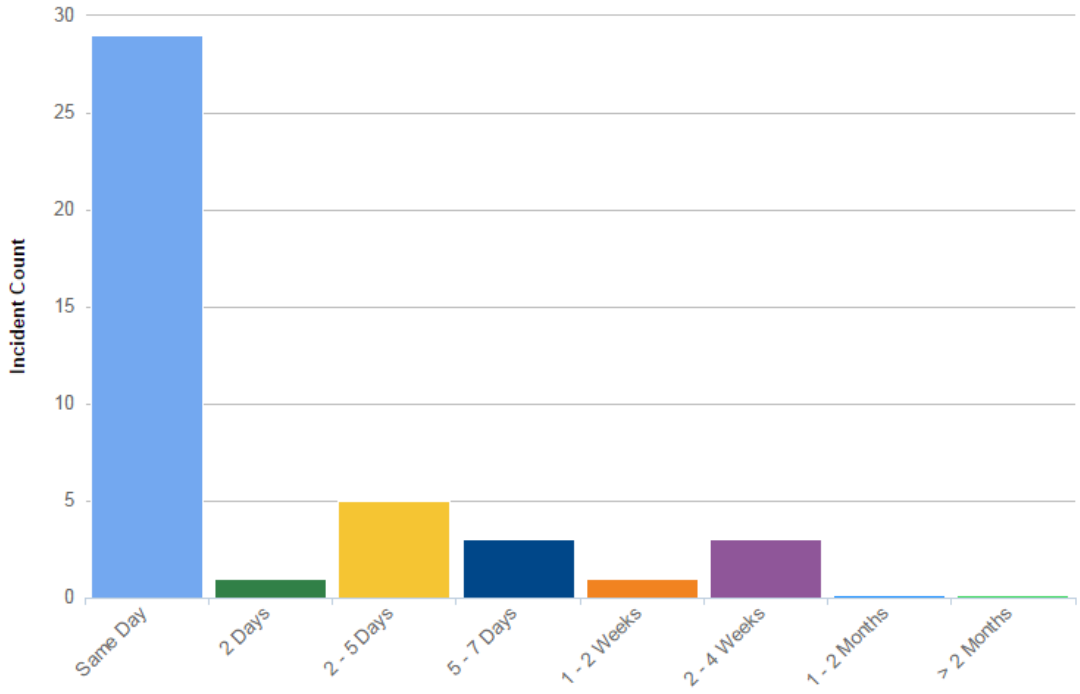
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Reporting By Service - After



Service Portfolio – IT Service Name

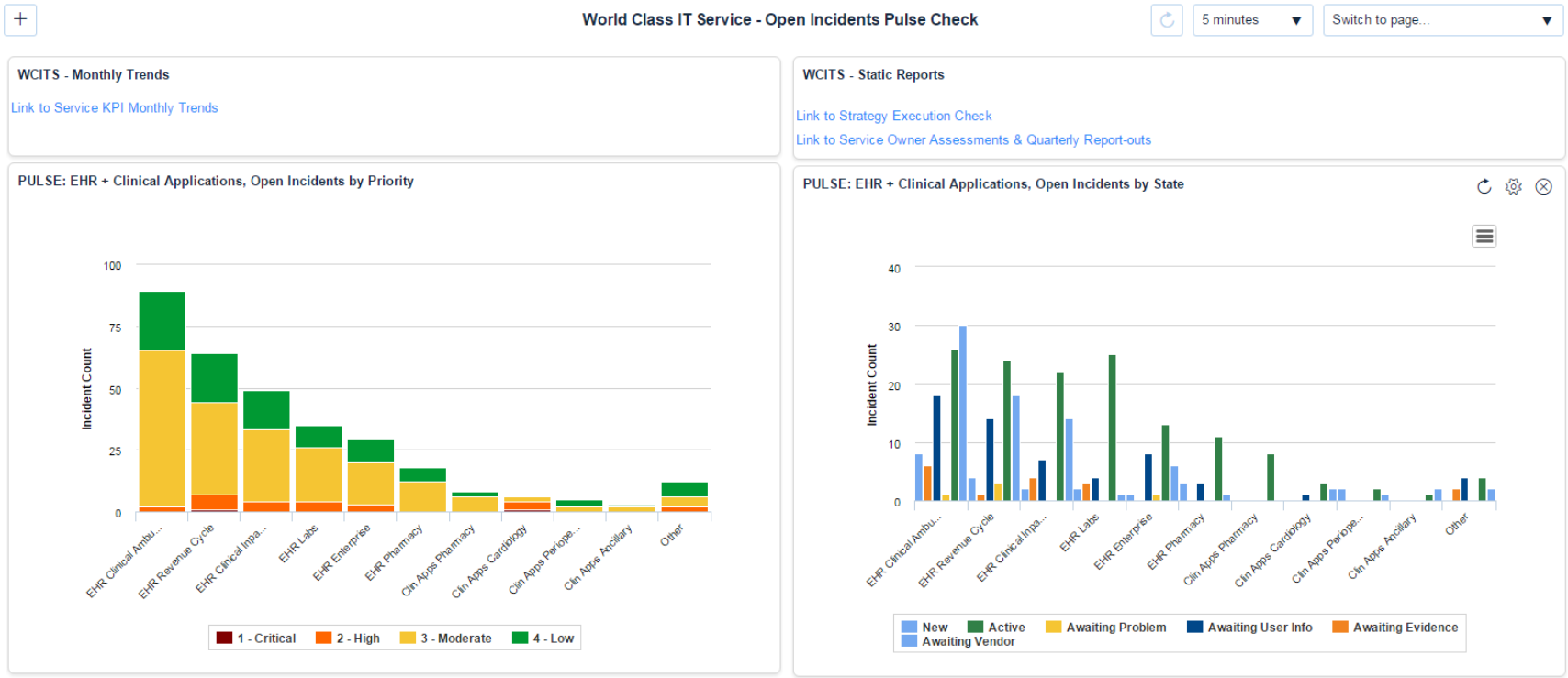
- ✓ Simpler
- ✓ Easier to maintain
- ✓ More accurate



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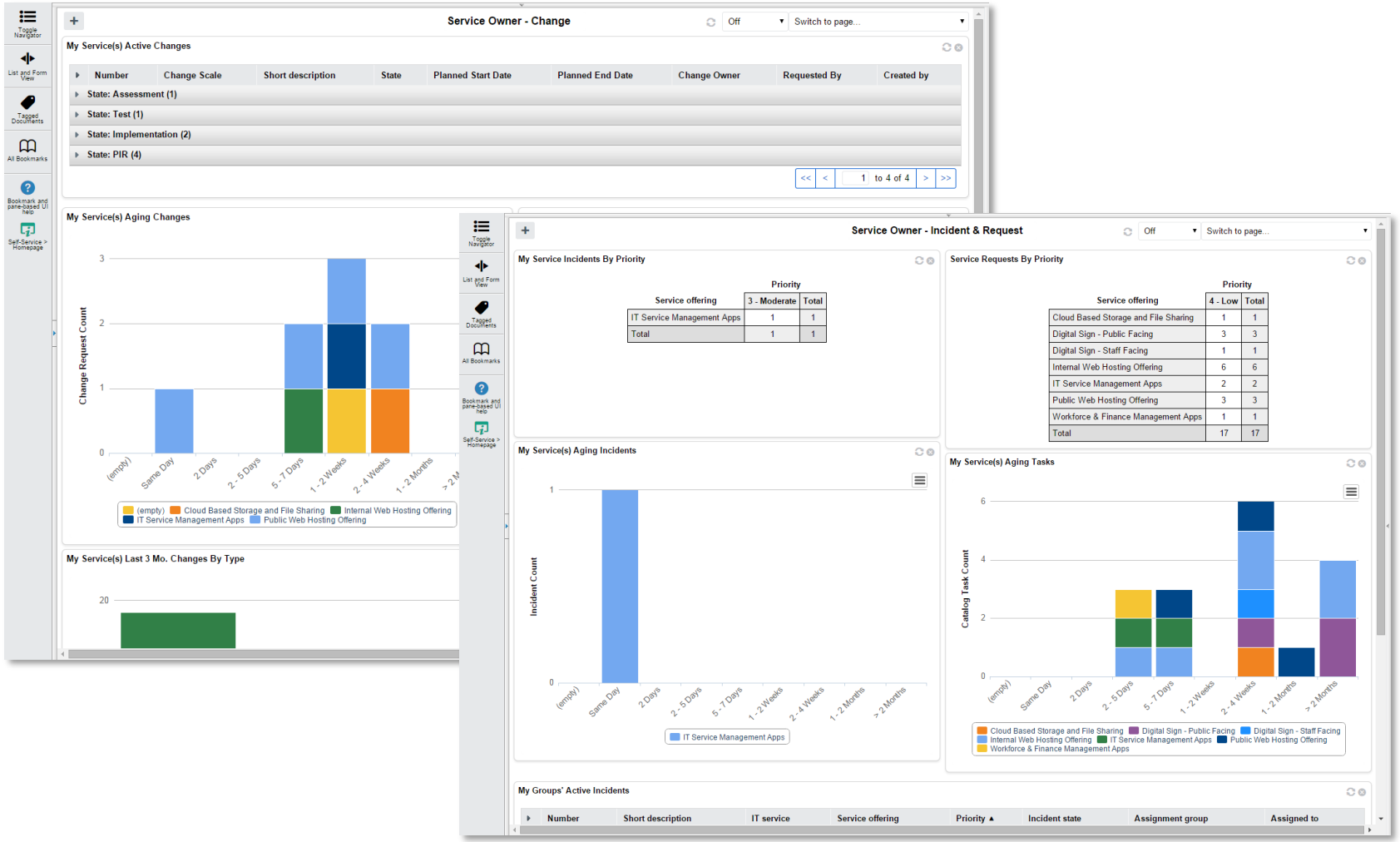
Enabling New Reporting – Using the Hierarchy

- Leverage the hierarchy of the catalog
- Service Owners can see how they compare to peers
- Leadership can see how different IT Service Lines compare to each other
- Driving Improved Service Quality



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Service Owner Dashboards



- Customized dashboards reporting Services owned by
  - Me
  - My reports
  - My Manager

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Pitfalls

"The maxim, "Nothing prevails but perfection," may be spelled PARALYSIS."

Winston S. Churchill

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Pitfalls: Terminology / Vocabulary

- Essential to establish common terms early
  - ITIL vs ServiceNow vs Duke organic (we default to ITIL)
  - 50% of every meeting was spent getting everyone on the same page!
- Write down definitions and socialize
- Be consistent and simplify
  - Delicately correct incorrect use
- Eliminate “loaded” terms
- Encourage leaders to use the correct terminology

Examples

Conflicting & confusing terms abound!

- Service Portfolio
- Service Catalog
- Request Catalog
- Supporting Service
- Enabling service
- Infrastructure Service
- Underpinning Service
- Technical Service
- Business Service
- Portfolio Item
- Request Item
- Task

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Pitfalls: Other

- Too many voices
  - Input is good but sometimes it is just noise
  - Include customers and users
    - …but don't let them slow you down
- It takes time
  - 1 hour a week won't cut it!
- Consensus must be built
  - You have to go on a road show
- Where is the value of the Service Portfolio?
  - You must explain this and reinforce it – do not assume understanding!

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The Service Portfolio and the IT Service Management Processes

Continuously introducing incremental value

December 2014

Incident Management

- *IT Service* becomes required for all new incidents.
- Automated selection of assignment group based on the *IT Service.*

January 2015

Problem Management
Knowledge Management

- Extended to Problems and Knowledge.
- Knowledge articles are less dynamic.

February 2015

Request Fulfillment
Change Management

- Request and Change are tightly integrated in Duke.
- Request catalog requires additional workload to capture the right Service Portfolio items for each Service request

July 2015

Time Cards
Demand Management
Project Portfolio Management

- Time cards activated, driven by task records.
- Demand Management.
- Project Portfolio Management.

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The Service Portfolio and the IT Service Management Processes

Continuously introducing incremental value

July 2015

Time Cards
Demand Management
Project Portfolio Management

- Time cards activated, driven by task records.
- Demand Management.
- Project Portfolio Management.

August 2015

SACM – Networking
SACM - Devices

- Configuration Records (CRs) for physical network manually maintained.
- Configuration Records for devices through integration with BigFix.

February 2016

SACM – tighter integration with processes

- Enterprise applications loaded into CMDB.
- Configuration Items and Applications integrated with Incident Management.

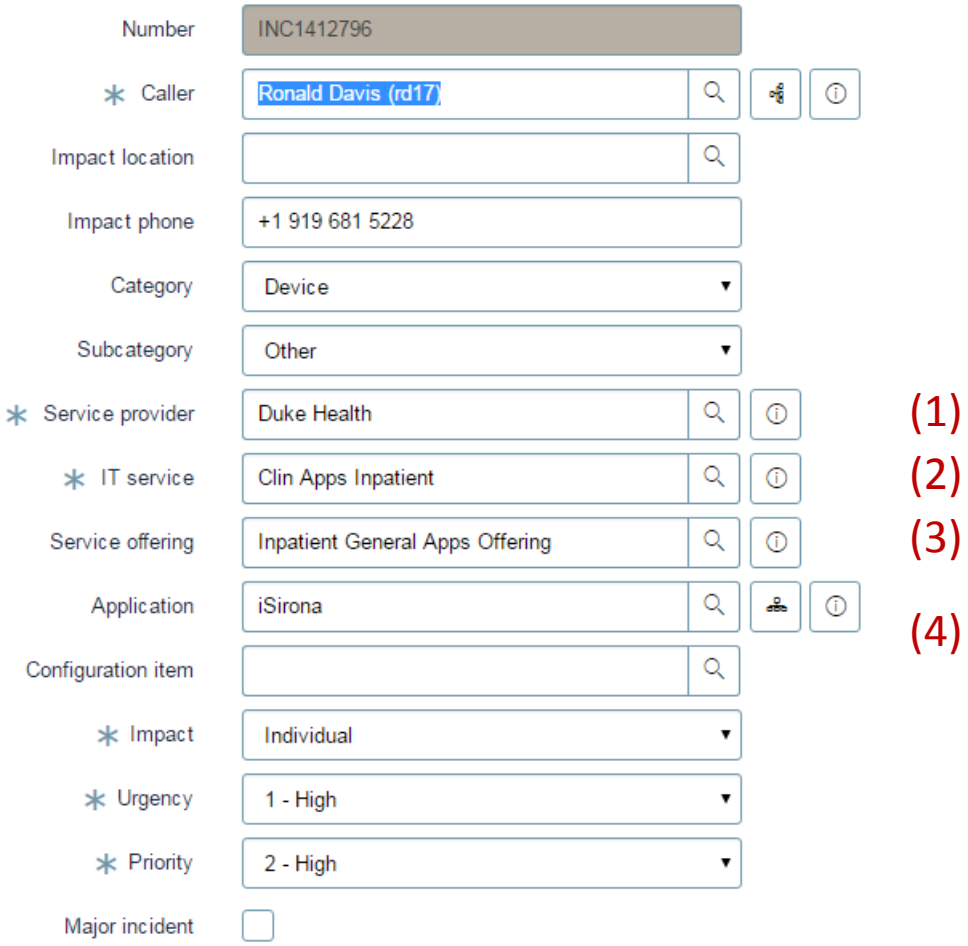
Future

SACM - Broader integration
Integrating Type I Service Providers

- Network integration with Spectrum and Logical networking.
- More integration of SACM with ITSM processes.
- Migration of Type I Service Providers.

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Typical action of Service Portfolio on the forms



(1) ***Service Provider*** determined by caller's affiliation.

(2) ***IT Service*** narrowed to just the services from the given Service Provider.

(3) ***Service offering*** narrowed to just the offerings for the selected IT Service.

(4) ***Configuration Item and Application*** will reverse look up the IT Service and Service Offering.

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Eras of Service Catalog Management at Duke

Requests as Incidents

- *All requests treated as an incident.*
- *Initially on CA Remedy.*
- *Migrated as is to ServiceNow.*

Generic Request

- *Single generic request added.*
- *Delivered separation of request and incident.*
- *No workflow. All requests handled by the Service Desk.*

Ad hoc Service Catalog

- *Unstructured catalog development.*
- *No Request Fulfillment pipeline or process.*
- *FIFO/chaotic development.*
- *Reactive approach.*

Managed Catalog

We are here!

- *Managed pipeline.*
- *Process definition and discovery.*
- *Process Ownership.*
- *Proactive approach.*

Engaged Customers

We are Closing in on this!

- *Integrated IT Governance.*
- *User Focused development of services.*
- *Transparent Services.*

Growing maturity yields accelerated delivery

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Establishing proactive catalog management

- Establish Process, Roles and Responsibilities
  - Build a process and develop a RACI
    - "Request for a Request"
    - Major confusion will abound otherwise
  - Clearly communicate the process and roles
    - Vital that the owner of the process you are automating knows the process and what they are responsible for.
  - Adequately staff the roles



Request Fulfillment process owner and process manager



Process engineer

- Discover
- Define
- Document



Development

- Models – basic staffing; contractor augmentation; enabled power users



Service owner and their resources

- SME; analysts; testers; users

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Establishing proactive catalog management

- Manage the pipeline
  - Integrate Customers and Users into the processes
    - IT Governance
    - Transparency
    - User guided
  - Establish your prioritization factors, Duke examples include:
    - Regulatory
    - Patient Safety
    - Security
    - ROI (work avoidance, cost reduction)
  - Re-visit and re-prioritize regularly
    - Identify the next best action
  - Be Agile
    - With your decision making as well as your development process
  - Ensure request catalog items use the service portfolio

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Future opportunities and challenges in Portfolio and Catalog

- Challenges
  - Usability
    - Unique challenges presented by a clinical setting.
  - Adoption of the Service Catalog
    - Effectively steering users to using catalog items rather than calling the service desk or using a generic request.
  - Tolerance and Patience
    - Clinical
    - Management
    - IT
  - Lack of user and customer engagement
- Opportunities
  - Greater Automation
    - Cost reduction and user satisfaction.
  - Empowering Service Owners
    - Services-led and Customer focused organization.
  - Deeper and tighter customer and user engagement
    - Transparency is critical
  - Tighter integration with Finance
    - Coordinated changes to the Service Portfolio.

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Top Takeaways

1 Time – your organization needs to mature.

2 Support – your senior leaders need to set the tone and direction.

3 Governance. Customer is your King. User is your Queen.

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Thank You

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