knowledge17

WORK at LIGHTSPEED™

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

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Session Overview



Objectives

- Learn how Duke Health established its first Service Portfolio built within the ServiceNow CMDB and built out its Service catalog utilizing requests within ServiceNow



What You Will Learn

- About the Duke Environment
- The difference between the Service Portfolio and the Service Catalog
- The structure of our Service Portfolio
- Our approach to the Service Catalog
- Our vision for the future of Service Portfolio and Service Catalog at Duke Health

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Speaker Introduction



NAME: Nathan Bost

TITLE: ITSM Excellence Program Team Lead

FUNCTION: IT

COMPANY: Duke Health

EXPERIENCE: 3 years IT Service Management (Duke Health); 5 years Remote Technical support (IBM)

EXPERTISE: Request Fulfillment; Agile Development (SDLC); Business Process Discovery and Design; Certified Curry Consumer

ACHIEVEMENTS: Streamlined Agile Development and Testing processes; First successful Duke Health User Portal; Demand Management Framework

CURRENT PROJECTS: Enterprise Process Discovery, Design and Re-Engineering; Streamline Service Transition Readiness Assessment Process

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Speaker Introduction



NAME: Glyn Tomkins

TITLE: ITSM Excellence Programme Director

FUNCTION: IT

COMPANY: Duke Health

EXPERIENCE: 29 years IT Experience: 24 great years at IBM (then two more!); 3 years at Duke Health

EXPERTISE: IT Service Management; Full Software Development Lifecycle; Service Ownership; Business Operations Management; Business Process Discovery and Design

ACHIEVEMENTS: IBM Watson Scrum Master; IBM Certified Executive Project Manager

CURRENT PROJECTS: Enterprise Process Discovery, Design and Re-Engineering; CMDB (it never ends)

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NAME: Duke University Health System

INDUSTRY: Healthcare

MARKET FOCUS: DUHS combines the Duke University School of Medicine, the Duke University School of Nursing, the Duke Clinic, and the member hospitals into a system of research, clinical care, and education

Top doctors providing quality care ranked among THE BEST IN THE NATION.



ADVANCING HEALTH TOGETHER

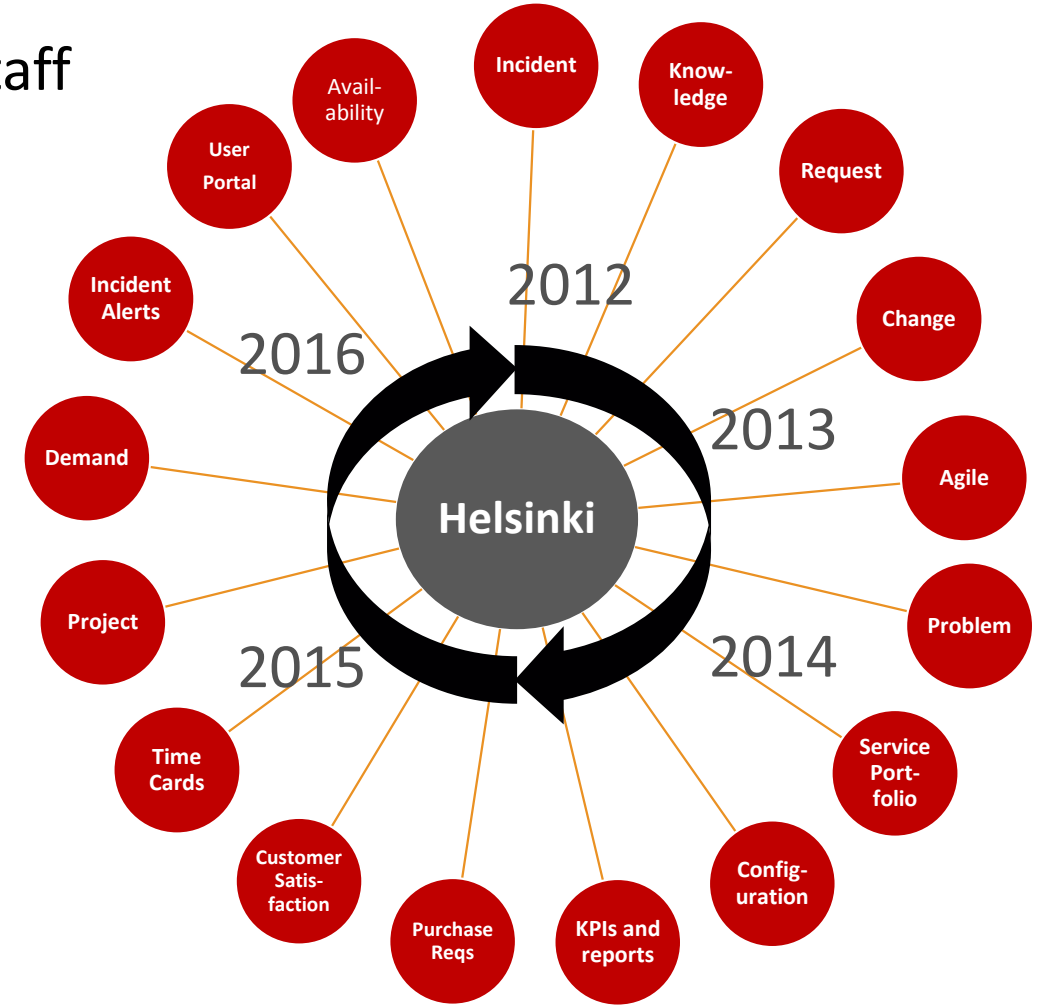
- Deliver tomorrow's health care today
- Accelerate discovery and its translation
- Create education that is transforming
- Build healthy communities
- Connect with the world to improve health globally

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Duke Health

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



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Before We Get Started: Who are Our Stakeholders?

- Customers and Users
  - There is a difference!
    - A customer is someone who buys ($$) our services. This is the person or group that defines and agrees to our service level targets, sets priorities, provides governance.
    - A user is the person who uses the IT service on a day-to-day basis. The consumers of the services that we provide.
    - There is a distinct difference. We use the ITIL definition and we are careful at Duke Health in referring to the two distinctly.
- IT teams
  - Analysts
  - Project Managers and Team Leaders
- IT Senior Leaders

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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



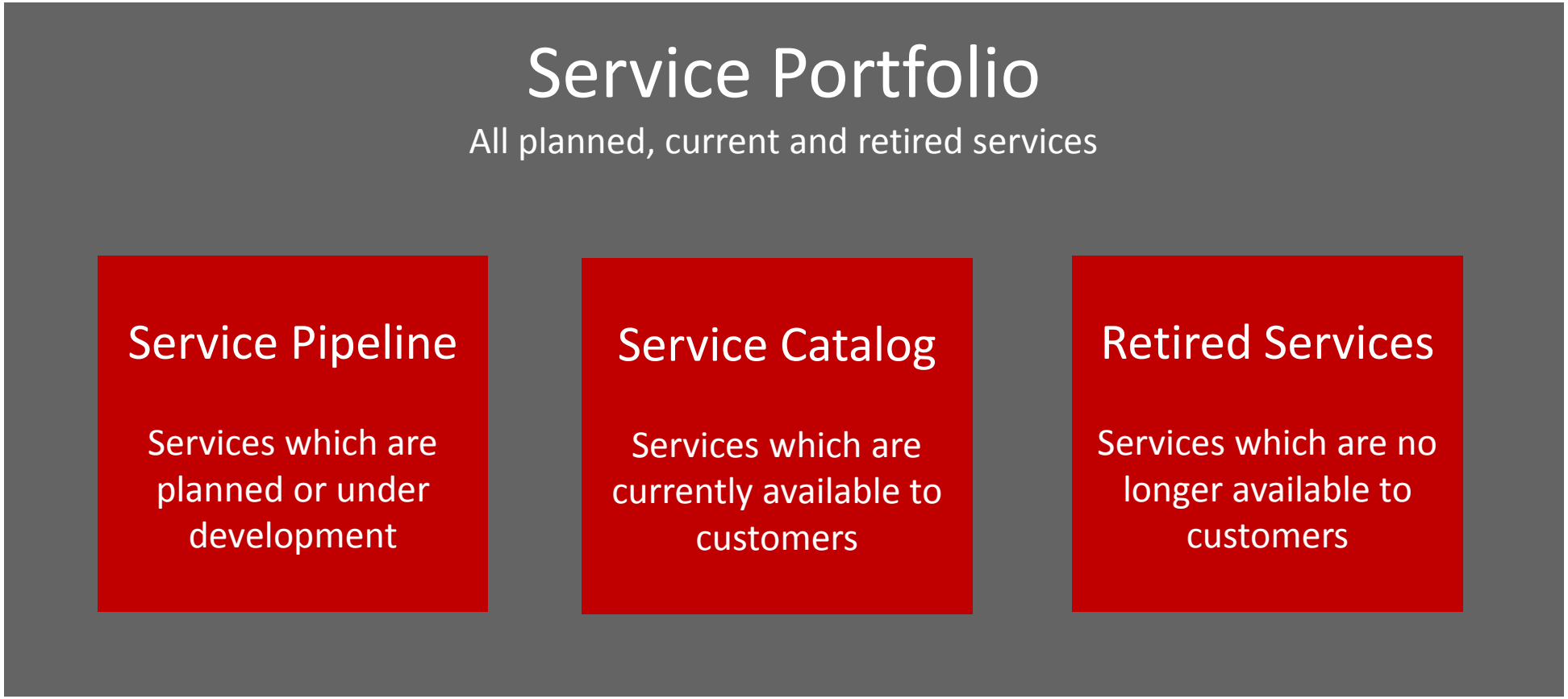
Service Catalog

- Where end users submit requests for
  - new services
  - changes to existing services or
  - discontinuation of 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

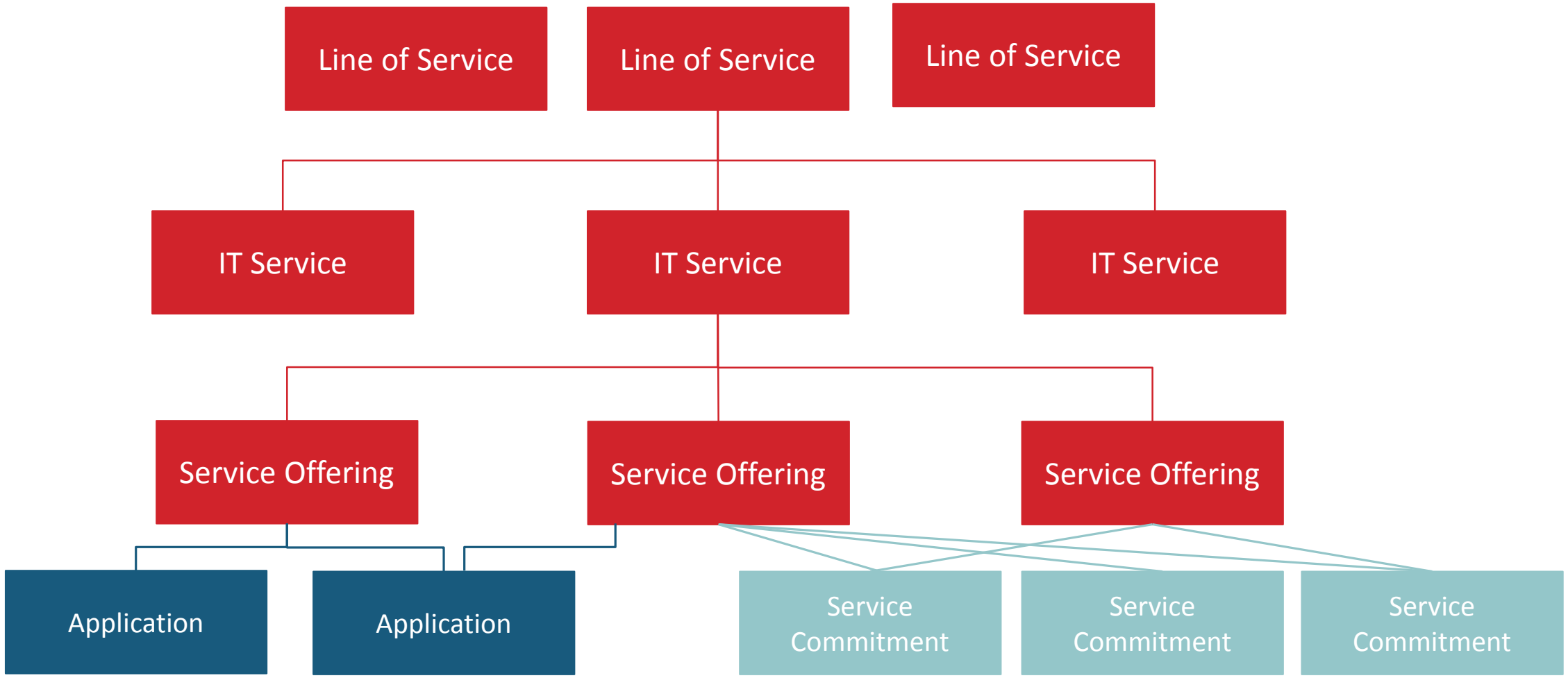
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ITIL Service Portfolio



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Duke's Service Portfolio Structure



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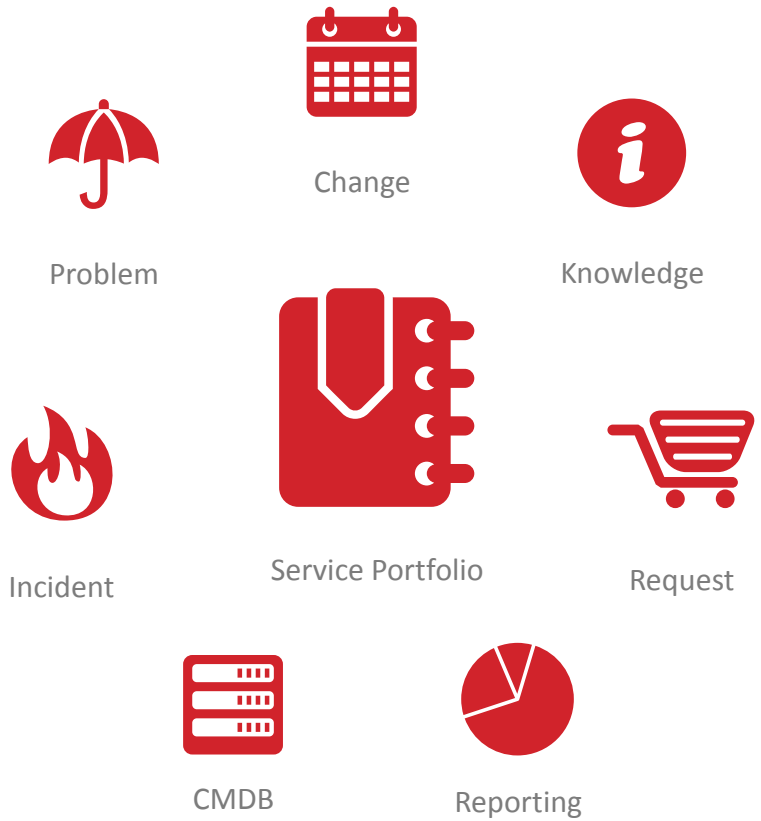
Service Portfolio attributes

- Your Service Portfolio must be
  - Customer centric
    - Structured in a way that is meaningful to your customer
  - Technology agnostic
    - Should not change as 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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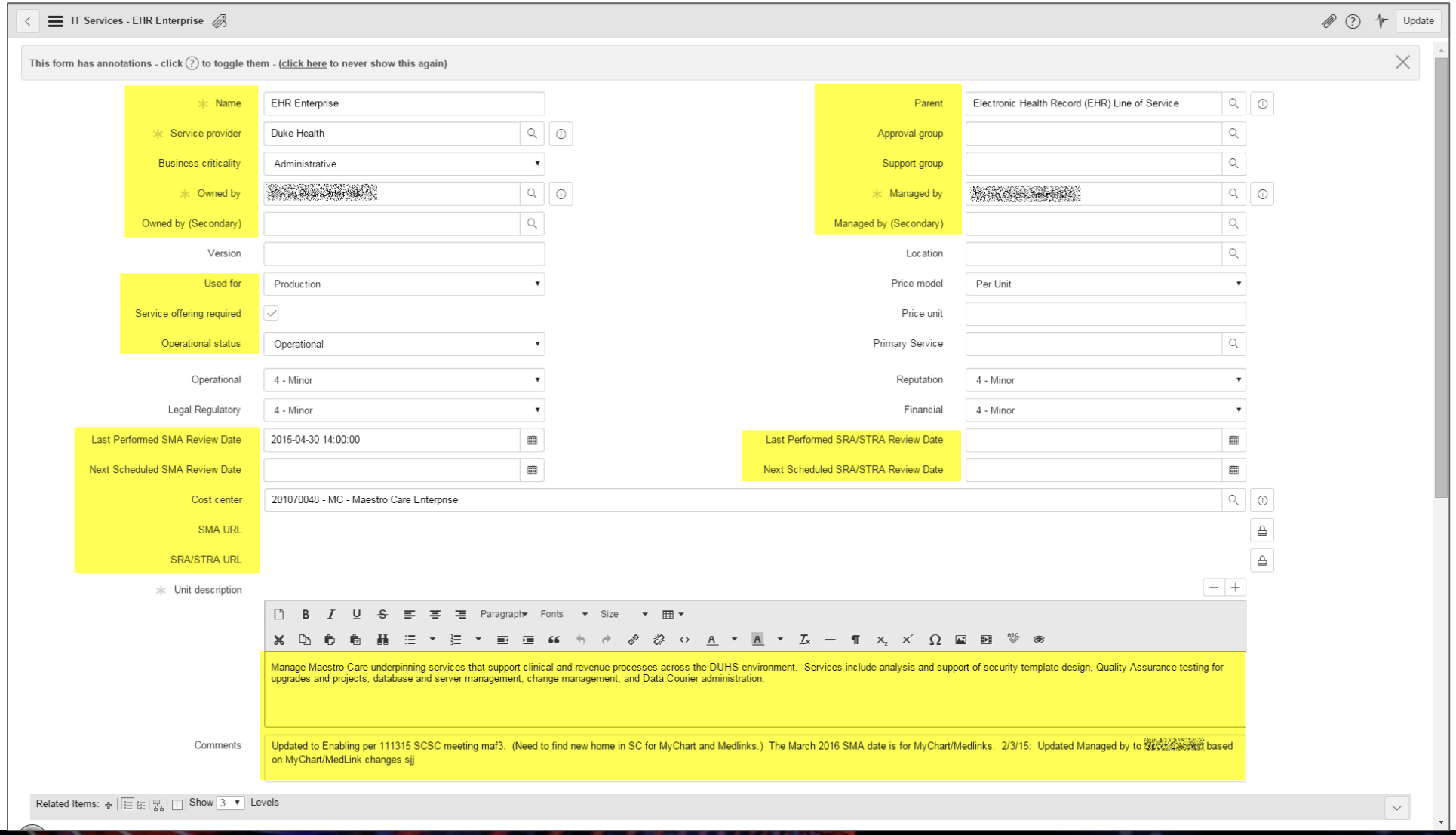
Portfolio Example

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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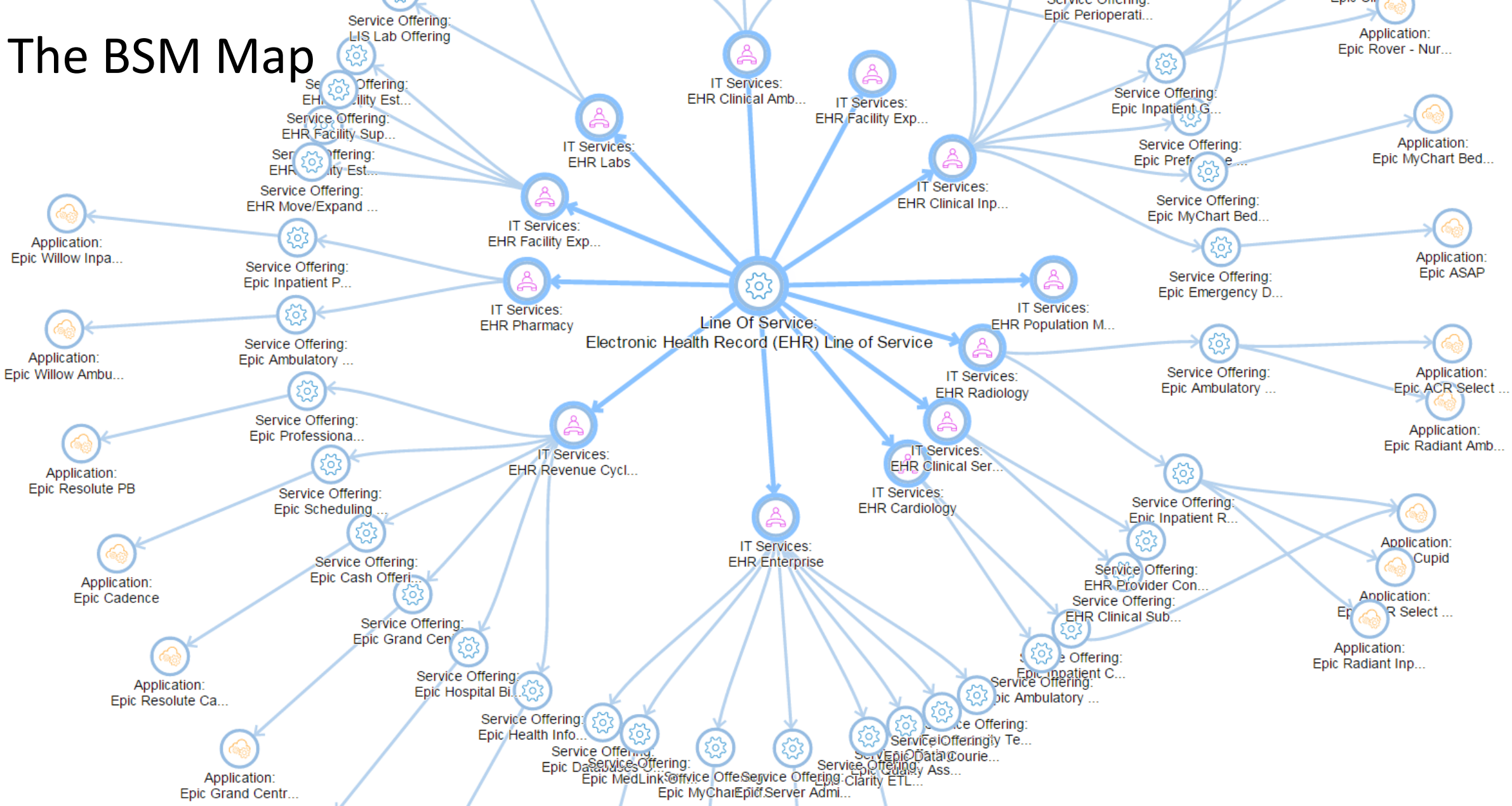
IT Services - EHR Enterprise

This form has annotations - click ? to toggle them - (click here to never show this again)

* Name	EHR Enterprise
* Service provider	Duke Health
Business criticality	Administrative
* Owned by	[redacted]
Owned by (Secondary)	
Version	
Used for	Production
Service offering required	✓
Operational status	Operational
Operational	4 - Minor
Legal Regulatory	4 - Minor
Last Performed SMA Review Date	2015-04-30 14:00:00
Next Scheduled SMA Review Date	
Cost center	201070048 - MC - Maestro Care Enterprise

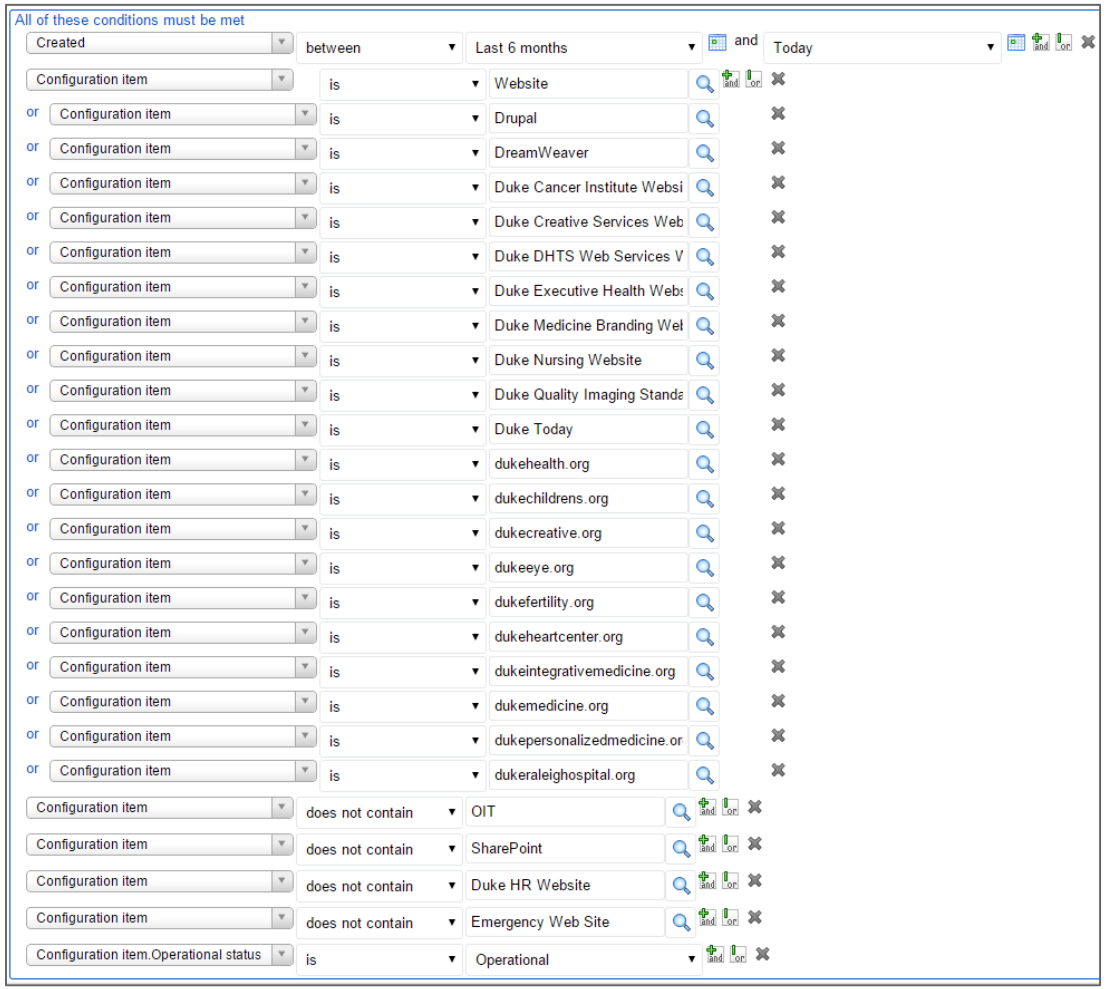
One Record

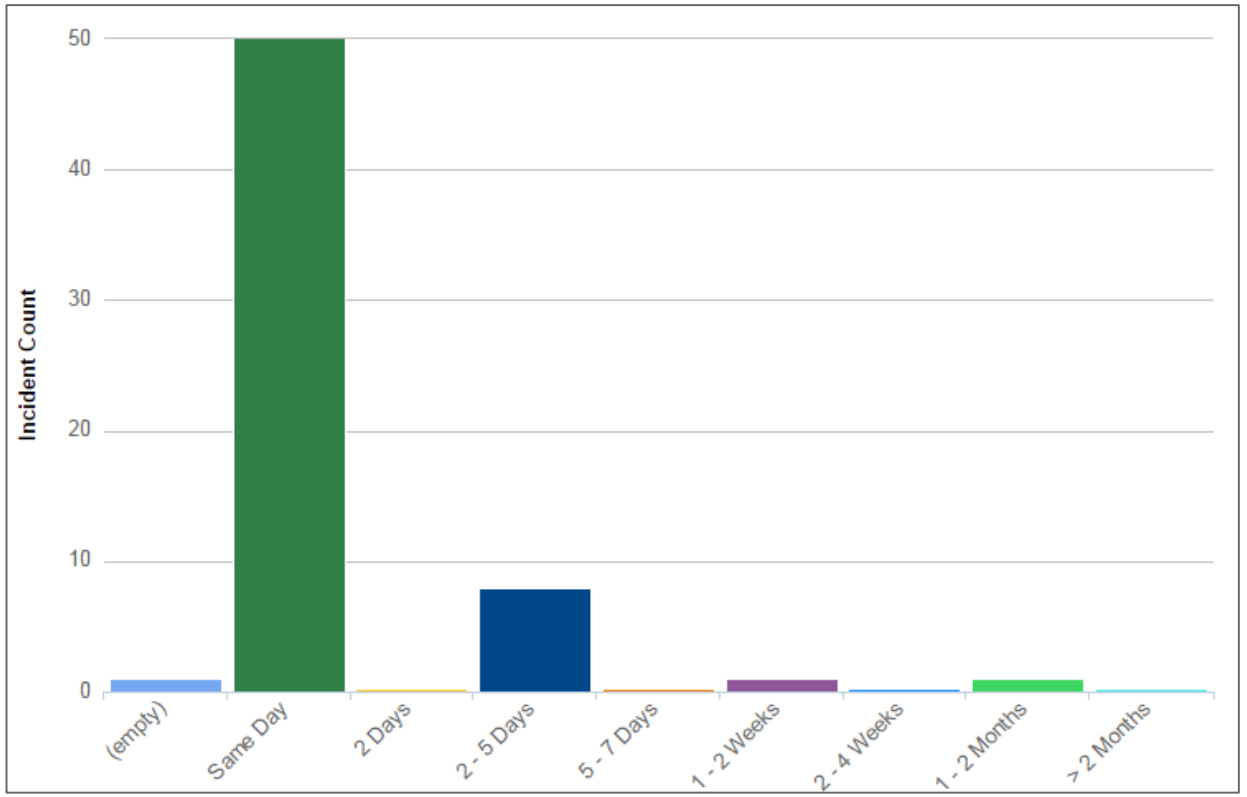
The BSM Map



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Reporting by Service - Before



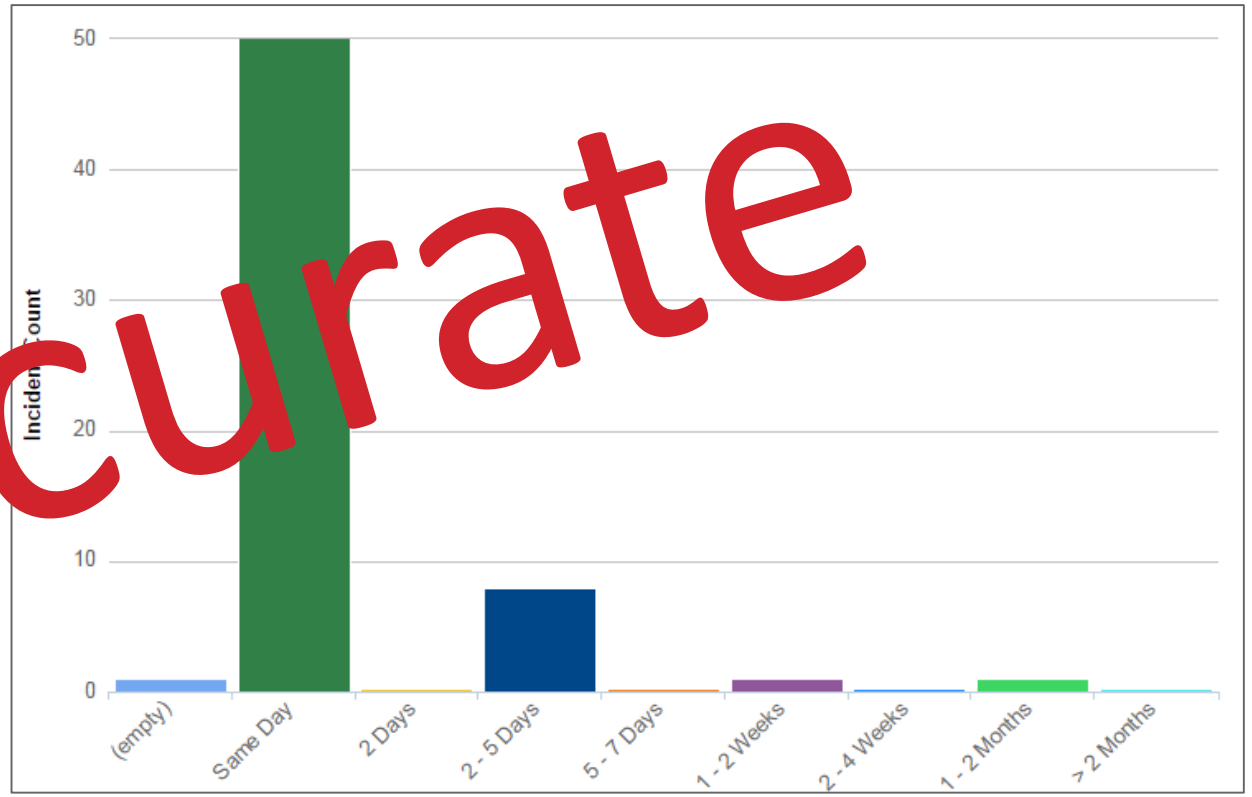


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Reporting by Service - Before

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	duk lity.org		
or Configuration item	is	duke center.org		
or Configuration item	is	dukein tivemedic rg		
or Configuration item	is	dukeme e.org		
or Configuration item	is	dukepers edmedicil		
or Configuration item	is	dukeraleigh al.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		



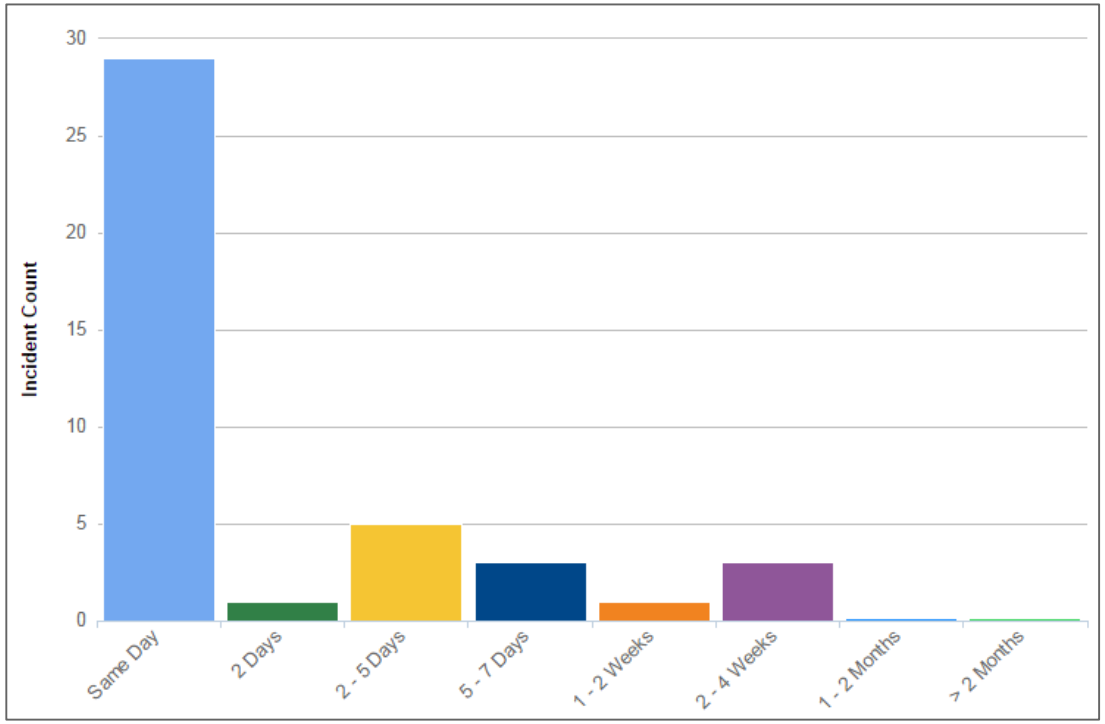
Inaccurate

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Reporting by Service - After



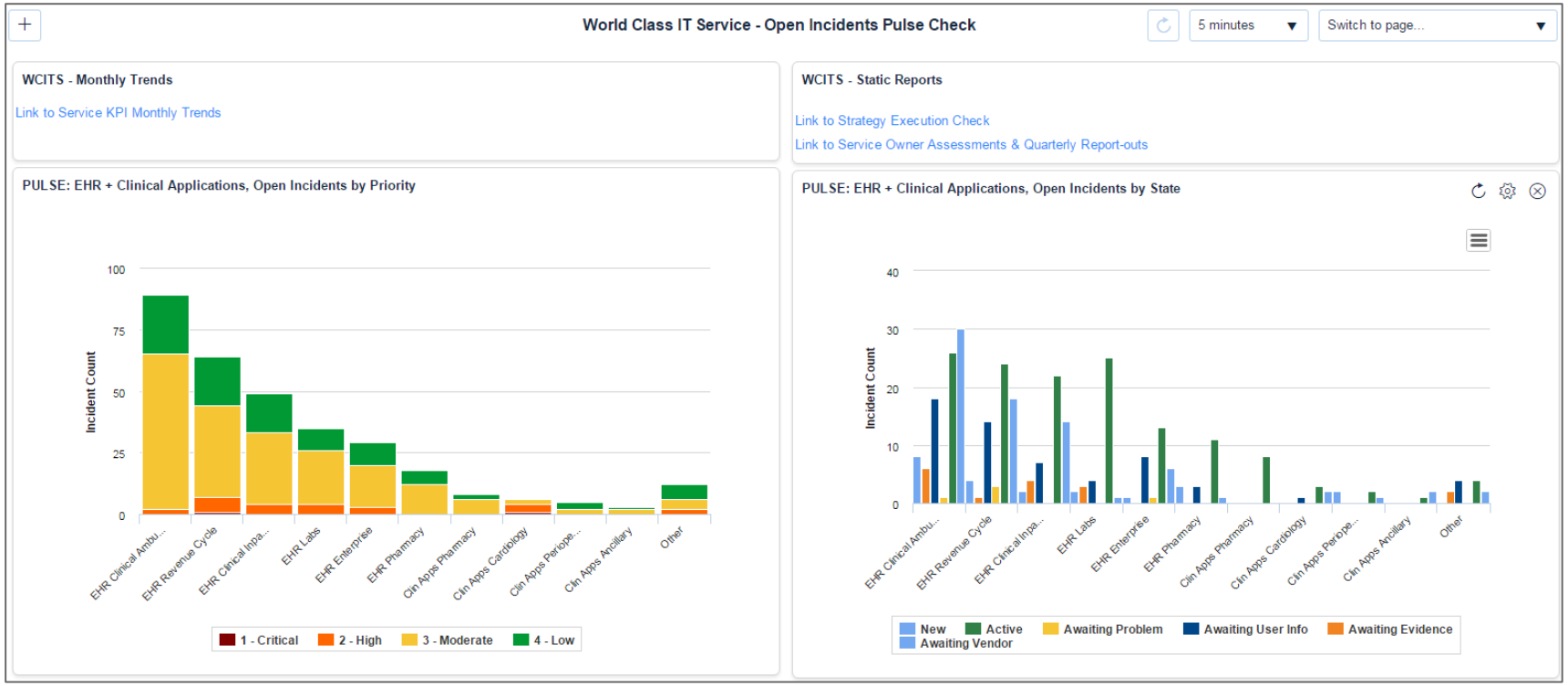
- ✓ Less complex
- ✓ Easier to maintain
- ✓ More accurate



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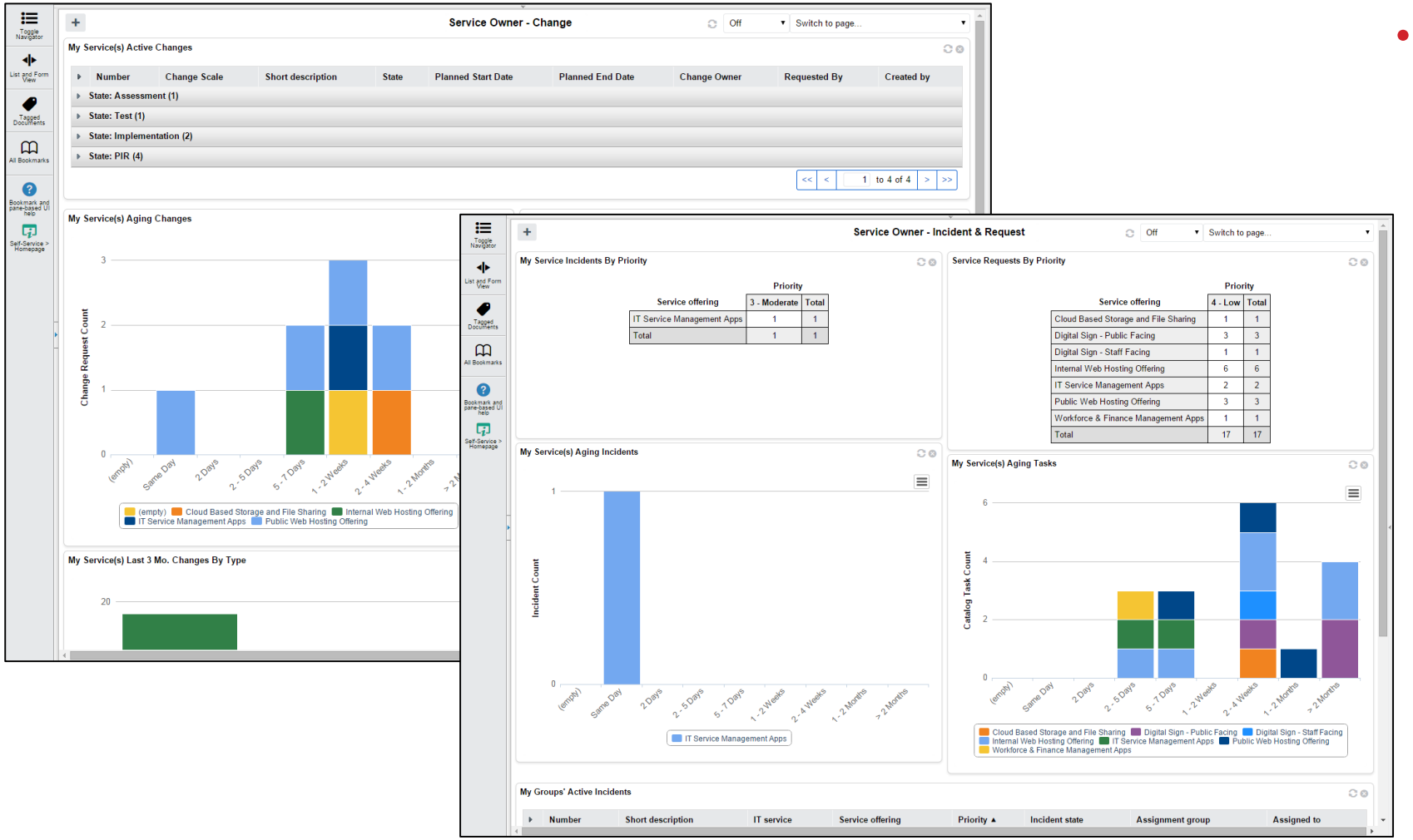
Reporting – Using the Hierarchy

- Leverage the hierarchy of the catalog
- Service Owners able to compare their service to other offerings
- Leadership able to compare different IT Service Lines
- Drives 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 work 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.

Source Information Here

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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.

Current

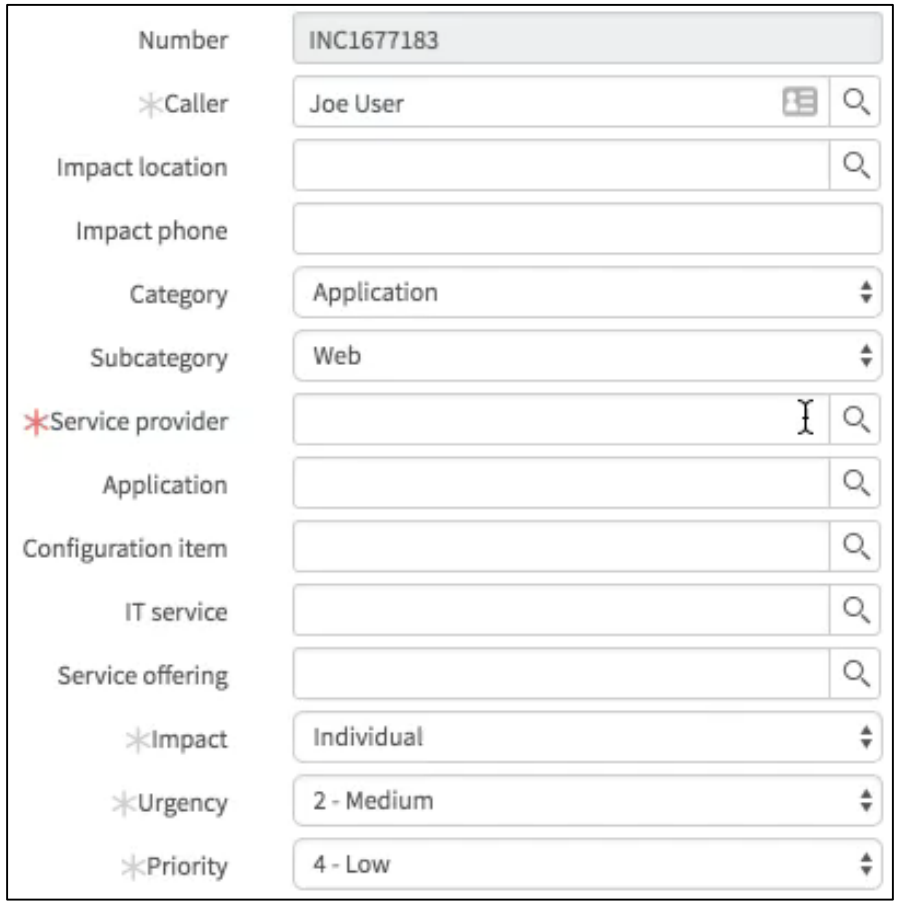
SACM - Broader integration
Integrating Type I Service Providers

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

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Service Portfolio on ServiceNow Forms



(1)
(2)
(3)
(4)

(1) SERVICE PROVIDER determined by caller's affiliation.

(2) APPLICATION AND CONFIGURATION ITEM will reverse look up the IT Service and Service Offering.

(3) IT SERVICE narrowed to just the services from the given Service Provider.

(4) SERVICE OFFERING narrowed to just the offerings for the selected IT Service.

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Eras of Service Catalog Management at Duke

REQUESTS AS INCIDENTS

- All requests treated as an incident.
- Initially on BMC 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

- Integrate Customers and Users into the processes
- Establish your prioritization factors
- Be Agile
- Re-visit and re-prioritize regularly
- Ensure request catalog items use the service portfolio

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Establishing proactive catalog management

- Integrate Customers and Users into the processes
  - IT Governance
  - Transparency
  - User guided
- Establish your prioritization factors
- Be Agile
- Re-visit and re-prioritize regularly
- Ensure request catalog items use the service portfolio

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Establishing proactive catalog management

- Integrate Customers and Users into the processes
- Establish your prioritization factors
  - Regulatory
  - Patient Safety
  - Security
  - ROI (work avoidance, cost reduction)
- Be Agile
- Re-visit and re-prioritize regularly
- Ensure request catalog items use the service portfolio

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Establishing proactive catalog management

- Integrate Customers and Users into the processes
- Establish your prioritization factors
- Be Agile
  - With your decision making as well as your development process
- Re-visit and re-prioritize regularly
- Ensure request catalog items use the service portfolio

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Establishing proactive catalog management

- Integrate Customers and Users into the processes
- Establish your prioritization factors
- Be Agile
- Re-visit and re-prioritize regularly
  - Identify the next best action
- Ensure request catalog items use the service portfolio

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Establishing proactive catalog management

- Integrate Customers and Users into the processes
- Establish your prioritization factors
- Be Agile
- Re-visit and re-prioritize regularly
- Ensure request catalog items use the service portfolio
  - Integrate your Service Portfolio throughout all your processes

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Future opportunities and challenges in Portfolio and Catalog

- Challenges
  - Usability
  - Service Catalog adoption
  - Tolerance and Patience
  - Lack of user and customer engagement
- Opportunities
  - Greater Automation
  - Empowering Service Owners
  - Deeper and tighter customer and user engagement
  - Tighter integration with Finance

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Future opportunities and challenges in Portfolio and Catalog

- Challenges
  - Usability
    - Unique challenges presented by a clinical setting.
  - Service Catalog adoption
    - 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

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Future opportunities and challenges in Portfolio and Catalog

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  - Tighter integration with Finance

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Future opportunities and challenges in Portfolio and Catalog

- 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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Q & A

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