

ITIL V3: Get ready for the next chapter in service management

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Why ITIL is important

In business and technology circles, the IT Infrastructure Library, or ITIL®, is viewed as the most widely accepted approach to IT Service Management (ITSM) in the world.

Owned by the British government's Office of Government Commerce, ITIL provides a cohesive set of best practices, drawn from both public and private sectors. ITIL is the backbone to structuring IT organizations that optimize service quality, improve service levels and reduce costs—and it's becoming increasingly important to today's corporations.

In fact, a recent industry analyst report notes that by 2008, more than half of all enterprises will be looking to standardize ITSM processes based on ITIL. What's more, industry analysts have observed that many corporations are looking into improving their infrastructure management processes, as demonstrated by the strong interest in ITIL and other process rationalization methods—implying that the ITIL approach is well on its way to becoming the de facto standard for service delivery.

Why update ITIL? Why now?

Just as business and technology are constantly evolving, so too is the approach to ITSM—making this the ideal time for an ITIL refresh.

Certainly the IT industry has matured since ITIL V2 was published in the late 1990s. That version put greater emphasis on what service management is—rather than how you can best approach it. The last version also centered on processes for Service Delivery and Service Support, all of which aligned to activity and output but not necessarily to value.

ITIL V3 represents a significant shift in how IT is viewed in the greater business context. With the realization that managing IT requires more than just a set of processes comes an increased focus on managing the service lifecycle and providing value to the business—with an emphasis on how technology can best be leveraged to enhance that value.

ITIL V3 brings service management in line with changing business needs and priorities, advancing technology and new governance models. The refreshed version is better aligned to the needs of CIOs and the businesses they serve. It features modifications designed to speed and simplify the implementation, adoption and application of service management processes to optimize business outcomes.

On a practical note, the new version includes updates that:

- Clarify the business benefits to be derived from ITIL
- Improve its usefulness and applicability
- Make it easier to implement ITIL
- Leverage real-world advancements since V2, including tools, technology and relationship types.

What has changed?

While there are no fundamental departures from the basic principles and processes that have constituted ITIL since the beginning, the differences between ITIL V2 and ITIL V3 are a direct result of maturity in the market and a deeper understanding of ITSM and its role within the business.

However, some significant changes can be found in the refreshed version. Perhaps the first, most obvious change is that ITIL V3 divides the materials into three distinct components:

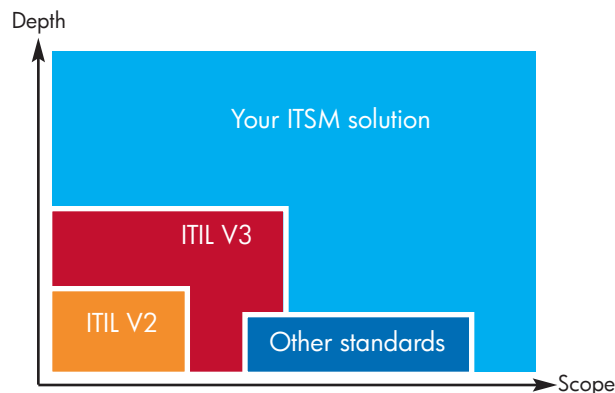
- Five core books, presenting the basic building blocks of ITSM, based around a service lifecycle approach
- Complementary materials, published to meet specific scenarios or examples, such as “how to implement IT service management in an outsourced environment” or “how to use Six Sigma to implement IT service management,” with some of these materials being Web-based, so that they can be published more rapidly and keep ITIL V3 up-to-date with new developments
- Value-added products, such as templates and workflow diagrams

This new structure is intended to prolong the life of ITIL V3 while also providing more specific guidance to ITIL users for specific situations.

Other evolutionary changes are designed to smooth integration with existing service management operations, while placing greater emphasis on operational efficiency. For example:

- ITIL V3 offers guidance on how to comply with current legislation and regulations such as Sarbanes-Oxley and Basel II, as well as formal governance models.
- Industry- and topic-specific guidance includes implementation templates for addressing special concerns of specific vertical markets and industries.
- New topics include service management strategies for outsourcing, co-sourcing and shared services models.
- A greatly expanded, state-of-the-art service management knowledge system captures current practice and aids proactive service management.

ITIL V3 positioning



A full customer-specific IT Service Management solution requires more than ITIL

Sharpening the focus on the service lifecycle

The first two ITIL versions grouped content according to process. The idea was that if ITIL defined the processes, IT managers would define how to organize and implement them to achieve higher quality services and reduce costs.

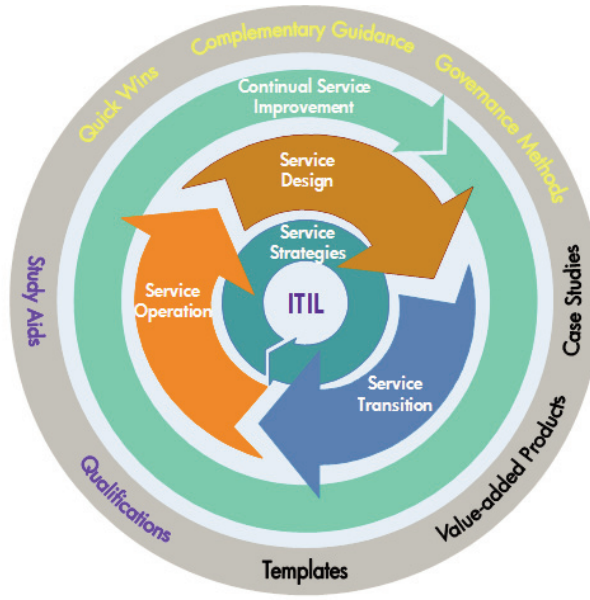
Over the past five or more years, that view has shifted and matured. It is now clear that ITIL processes cannot just be implemented in isolation. IT is an increasingly strategic part of the organization—and managing IT is not just about implementing the processes and one function. It is about understanding and meeting business needs through the provisioning of IT services at every stage of their lifecycle, encompassing everything from strategy to daily operations.

With this new view of IT and ITSM in mind, ITIL V3 is structured according to the stages of the service lifecycle and the business outcomes they support. The processes from ITIL V2 are still there—but this time ITIL shows exactly how these processes are used to provide services that support the business, as well as how they are implemented and managed.

In ITIL V3, the five principal stages of the service lifecycle are defined as:

- **Service Strategy** for practical decision-making: This is where the role and requirements of IT are defined to ensure overall business success.
- **Service Design** with a pragmatic service blueprint: IT will design services that meet the business needs—both through functionality and performance—and also design them to be manageable and cost effective.
- **Service Transition** to improve management change, mitigate risk and assure quality: Services will be tested and introduced into the infrastructure in a controlled manner. Transition also ensures that IT is able to respond to changes in both the business and IT environments, resulting in a more agile, responsive organization.
- **Service Operation** for more responsive, stable services: This is where the services are actually delivered and supported. Operation achieves a balance between delivering what has been designed, and responding to variations in the business and IT environments to achieve stability and flexibility.
- **Continual Service Improvement** with measurements that work: This involves the ongoing monitoring and

measurement of the quality and cost of services— identifying ways in which both of these areas can be improved while staying aligned with changing business requirements.



ITIL V3: New structure focuses on the service lifecycle

Some ITIL constants remain

It's important to note that key concepts are preserved in ITIL V3—and more than half of current ITIL guidance remains unchanged.

For one thing, ITIL continues to represent a consolidated view of best practices from around the world. And it continues to be a collaborative effort among major vendors, government and commercial organizations.

The good news about IT qualification is that all ITIL qualifications will continue to be valid. There will be a new qualification scheme for ITIL, based on ITIL V3—with a short transition period where both V2 and V3 exams will be offered.

Equally significant news: There is no need to stop any ITIL-based work to wait for V3. Nothing in V3 will fundamentally change the service management challenges that companies are facing, and nothing changes the need for the processes that companies are already implementing.

Dispelling the ITIL V3 myths

It's a natural reaction, just human nature, really: With change comes fear, uncertainty and doubt—and the pending release of ITIL V3 is no exception.

Here's one myth circulating in the industry: ITIL V3 is no longer relevant or valid. Other methodologies and approaches are reaching maturity and will replace ITIL. People and organizations that were excluded from, or chose not to participate in, the ITIL V3 refresh project are the ones likely to be spreading this rumor. They do not state what the alternatives are but hint that some are under development.

It's also a myth that ITIL has been completely rewritten—and that companies will have to start learning ITIL and implementing it all over again. This is simply not true. The processes in V2 are all still represented in V3—just in a clearer, simpler and more complete way. The fact that the processes have been organized by lifecycle actually makes them easier to implement and use.

Also circulating around the ITIL rumor mill: ITIL V2 and V3 exams will continue to be run in parallel and organizations can choose to be either V2 or V3 compliant. This does not make any sense. No organization should strive to be ITIL compliant because ITIL is not a standard. An organization should strive to use ITIL to achieve its goals, for example, for improving service and optimizing costs. The V2 exams will continue to be valid for a short time after the V3 certification structure is introduced as a courtesy to students who have taken V2 courses and want to complete their exams based on the V2 course materials.

A number of ITIL V3 myths are related to ISO/IEC 20000. One promotes the theory that ITIL is being replaced by ISO/IEC 20000 and will become just one of many ways to obtain ISO/IEC 20000. First, ITIL is not, and has never professed to be, a formal industry standard such as ISO/IEC 20000. Indeed, ITIL is to be adopted and adapted to fit the needs of the IT organization, whatever the size and however formally. The main aim of ITIL is to provide a set of guidelines to help managers deliver quality IT services in support of the business at an optimized cost. This can be achieved without ISO/IEC 20000 certification. The fact that ITIL is not a requirement for ISO/IEC 20000 certification does not mean that it is not valid or that its real role has been superseded by the standard. ISO/IEC 20000 depends on deeper sets of industry best practice being available, whether ITIL or COBIT.

Another invalid assumption: Once a company has implemented ISO/IEC 20000, the ITIL journey will be complete. If this were true, there would be no more need for ongoing IT management since all processes are functioning and all business needs are being met.

ITIL is broader than ISO/IEC 20000 and the new service lifecycle approach shows how to manage IT services on an ongoing basis—not just how to implement processes after ITIL certification.

Writing the book on ITIL: HP's own experts play an active leadership role

Beyond support for ITIL, HP has taken an active lead in the ITIL and service management arena—through education, advocacy and by helping establish IT Service Management Forum, or itSMF, for user groups around the world.

Building on this rich history with ITIL, HP is the only technology vendor to provide the authors for one of the five ITIL V3 core books. In addition, HP's own ITIL experts were also awarded the task of authoring the ITIL V3 glossary, as well as building the overarching process models for the new library.

The participating authors from HP include:

- **David Cannon** and **David Wheeldon**, who worked together to write the Service Operation book
- **Ashley Hanna** and **Stuart Rance**, who authored the ITIL V3 Glossary of Terms, Definitions and Acronyms
- **Jeroen Bronkhorst**, who created the integrated ITIL process models

Each has, in his own right, the experience and credentials to write the definitive book on ITIL.

One of the original ITIL authors who contributed to all three versions of the ITIL books, David Wheeldon is perhaps one of the world's most experienced ITIL consultants and trainers.

According to Wheeldon, he has been involved with IT service management throughout his career, including 20 years spent working in large UK government departments. Numerous successful customer engagements have given him the opportunity to put service management theory into practice.

Wheeldon was recruited in the late 1980s to help write the ITIL V1 book, focused on Service Level Management. He is also one of the authors of the ITIL V2 book on Service Delivery.

"It's fair to say that I've been working with ITIL long enough to know this bit of historical data: The original name for ITIL was Government IT Infrastructure Management Methodology, or GITIMM," shares Wheeldon.

V3 co-author David Cannon was ITIL-certified in 1993, and has been working with ITIL "for a long, long time."

Cannon was instrumental in starting the itSMF chapter in his native South Africa—which was among the very first chapters—before going on to form itSMF International. Today, he is ITSM Practice Principal with HP Services.

"I think the fact that both David Wheeldon and I have worked with clients in not only the US and the UK but also Asia and Latin America was a contributing factor to our proposal for the Service Operation book being accepted," says Cannon. "We were able to bring a truly international view to the book."

Ashley Hanna and Stuart Rance teamed together to tackle the ITIL glossary. Both authors had previous experience writing and maintaining documentation and collateral materials for an international audience, which worked in their favor when it came to winning the bid to write and edit the glossary for ITIL V3.

A senior ITIL consultant and author with a long list of IT-related thought-leadership contributions and committee memberships to his credit, Hanna's ITIL roots trace back to his days in operations management at Tandem Computers Incorporated.

"As ITIL and the IT Service Management concept began to take shape, I realized it was a move to formalize what I had already been doing—concentrating on people and processes as a way of achieving high availability and service quality, and not just technology," adds Hanna. "As I moved into business development and services design, I found my early experience as a system manager and the day-to-day delivery of services to be invaluable."

Hanna now works as ITSM Practice Principal for Mission Critical Services in HP.

Glossary co-author Stuart Rance admits to being "a bit of an ITIL evangelist" as a senior systems engineer with Digital Equipment Corporation in the 1990s, at a time "when nobody had really heard of it."

Rance's previous ITIL writing résumé includes contributions to a number of ITIL pocket guides. He is currently the worldwide lead of the Service Management practice at HP.

Rance believes his background in availability management and capacity management has helped him identify the importance of planning plays in successful service delivery.

"When we look at customers who achieve their IT goals and customers who don't, it's the planning process that makes the difference, not the technology specifications," he notes.

Jeroen Bronkhorst first encountered ITIL when he was working for the Dutch Ministry of Defense in the early 1990s. When he joined HP in the late 1990s, he quickly moved on to take ITIL foundation and service management training and went through the certification process. Jeroen has worked for the past five years as a global ITSM Program Manager, developing and delivering ITSM services for HP clients. He has also authored numerous articles on ITIL, ITSM and HP's own ITSM reference model.

For his contribution to ITIL V3, Bronkhorst has been doing what he describes as “creating pictures that graphically represent what is written in the book.” In addition to the ITIL process models, he is among the few who have actually seen all the books, working with all the authors to make sure the various components of ITIL V3 are structured with consistent navigation.

The inside story: ITIL V3 in the making

Start with the glossary created for ITIL V3. Hanna and Rance were first asked to create a consistent baseline glossary based on the ITIL V2 publications, various existing glossaries and other sources of industry terminology, such as ISO/IEC 20000. This baseline was then used as a resource for the other ITIL V3 authors as they worked on their books.

Once ITIL V3 was nearing completion, the two were asked to update the glossary with changes and additions from the new books. They estimate that the totally revamped glossary includes more than 500 terms—with more than 120 terms added, 140-plus modified, 300 or so changed, and, to their surprise, more than 100 deleted.

The goal was to create a glossary that was consistent, simple, idiom-free and easy to understand.

“We thought it was going to be relatively easy to update the glossary but it turned out to be quite a major rewrite,” Rance says. “The Service Strategy book was particularly challenging because it contains mostly new material. We had to do considerable research because you can't really write a definition of something until you understand it thoroughly.”

According to Hanna, Rance and he collaborated very closely on the glossary work, communicating mostly via teleconference and real-time PC desktop sharing.

“We struck up a fantastic working relationship. Our skill sets are very complementary. Stuart is the detail guy, quick to remember the connections between a term here and a term there. I'm more the one who can

hone a term or definition that did not seem to make sense and work with it until it does,” explains Hanna. “We often started with a definition of a term that was technically correct but no one was ever going to understand on the first pass. My role was to make the glossary readable to the common man!”

While Hanna and Rance have been working with glossary terms, Bronkhorst has been tackling process models.

His work encompasses all five books, as he looks for consistency in concepts from one book to another. For example, through the five books, 27 processes are defined. He has in turn created one model that shows how those processes map to the five books.

“You can take two different approaches to creating models like this. There's the top-down approach, where you create the models and set the context for the author's work. I've taken the second option—the bottoms-up approach, where when the books were almost done, I began work on the models,” Bronkhorst explains. “I create the models, have them reviewed by the authors, the chief architects and the chief editor, then refine them based on feedback.”

So what about the experience of writing one of the core ITIL V3 books?

Cannon says that Wheeldon and he started with an outline and a structure for tackling the Service Operation topic—and stuck to it. The approach seemed to work—as theirs was the first book finished.

Research was an important part of the process, as the two authors made numerous customer reference visits with organizations who have pushed the boundaries beyond ITIL V2.

“We sought their views on best practices,” says Wheeldon. “Their experiences and insights helped us craft the Service Operation book.”

And what light does the book shed on the role Service Operation plays in the service lifecycle?

“I'd say the key theme of the Service Operation book is that in order to deliver IT services, you really have to be able to manage your infrastructure as well as the services,” says Cannon. “We also stress that operations is where business value is achieved. In all other phases of the lifecycle, we're really just promising things. It's in the operational cycle where the value is realized.”

Wheeldon agrees.

“Service Operation is when the systems go live. So it’s where organizations start reaping the benefits—but it’s also where failure can begin. It’s a point of maximum impact—one where stability is vital to success,” he adds.

Expert vision

Having devoted more than a year of their professional lives to ITIL V3, the five authors from HP have a unique view into ITIL then, now and into the future.

Hanna sees the adoption of ITIL as “inevitable.”

“Of course, time will tell if the ITIL refresh will accelerate that adoption, but I expect it will,” he adds.

Rance believes passionately that when an organization does service management properly, it can achieve two things at the same time: improve the quality of service and reduce the cost of service delivery.

“In five years, I think you’ll see the organizations that have implemented ITIL effectively reaping the benefits, and the ones who paid lip service to it falling behind,” he observes.

Bronkhorst sees a continuation of where things are heading now—where concepts that are developed under the umbrella of IT process management are also being applied to other service processes.

“What I see in ITIL is that it’s heading in a direction where it becomes less specific for IT,” he says. “This is already true for the Service Strategy book—where the guidance is generally applicable to any type of service provider, not just an IT service provider.”

From Wheeldon’s perspective, he feels that as people have a chance to read and digest the new ITIL books, they will recognize and accept the advancements over ITIL V2.

“Looking ahead to ITIL V4, or even ITIL V5, I believe we will see the continual merging of IT and business and the greater use of automation,” he says. “We’ve started this move with V3, which gives some excellent examples of how organizations can begin to take IT service management concepts and processes and apply them to the wider business context.”

When it comes to using IT Service Management in a business context, Cannon feels that most IT departments simply aren’t there yet.

“We do lay the foundation in ITIL V3 for this next step,” he says. “Moving forward, I think we are going to see more innovative uses of technology. We’re also likely to see more organizations using existing technologies and capabilities in very new and different

ways: more integrated tool sets, far more integrated solutions—not just from a tools and technologies point of view but from a process and business solution point of view. That’s why, if I look ahead to ITIL V4, I see the whole concept of business technology being clearly woven into the approach, with a greater emphasis on business outcomes.”

To learn more

HP Service Management solutions automate the dynamic link between your business and IT by giving you the insight required to measure, assess and control your business. Look to HP to provide you with a comprehensive solution—complete with services and software to help design, build, manage and continually improve a first-rate service management implementation.

For more information on how HP is supporting ITIL V3, visit: <http://www.hp.com/go/itilv3>

ITIL V3 preview

Here’s what ITIL V3 contains:

Core books

- Service Strategy
- Service Design
- Service Transition
- Service Operation (authored by David Cannon and David Wheeldon, HP)
- Continual Service Improvement

Supporting guidance

- Glossary of Terms, Definitions and Acronyms (authored by Ashley Hanna and Stuart Rance, HP)
- Integrated ITIL Process Models (authored by Jeroen Bronkhorst, HP)
- High-level Introduction
- What’s New

Complementary

- Pocket Guide
- Case Studies
- Templates
- Governance Methods
- Study Aids

Meet the ITIL V3 authors from HP

Jeroen Bronkhorst

Jeroen joined HP in 1997 and has fulfilled several roles. For the past five years, he has been a global ITSM program manager responsible for HP internal development, deployment and global support on sales and delivery of HP ITSM consulting services. In addition he was a strategic advisor to the worldwide Consulting & Integration (C&I) ITSM leadership team. In these roles he has contributed to significant growth of ITSM consulting services and an industry leading ITSM position for HP.

Jeroen is the lead authority for the HP ITSM Reference Model as well as a member of the ITIL V3 editorial core team and author of the integrated ITIL V3 models.

Jeroen's breadth of knowledge spans HP Software, HP ITSM Services, ITIL, ISO/IEC 20000, COBIT, CMMI, as well as IT strategies, IT auditing, IT security, IT organizational design and management of organizational change (MoC) techniques.

Previously, Jeroen was a senior ITSM solution architect, working with many HP customers in the Netherlands for more than four years. Jeroen is a certified ITIL Service Manager and an official book reviewer for the itSMF chapter in the Netherlands, as well as a certified IT auditor and member of the Dutch organization for registered IT auditors (NOREA).

David Cannon

David has more than 15 years' ITSM experience and is a Fellow of the Institute of Service Management—the highest level of professional achievement in this field.

His current role is ITSM Practice Principal within HP, where he is responsible for establishing, building and

supporting IT Service Management practices in Asia, the United States and Latin America.

He has provided training and consulting services to virtually every industry sector and at every level of management. He was also a key figure in establishing the IT Service Management industry in South Africa and the US, both by establishing successful businesses and through his involvement in the itSMF. He was the founder of the itSMF South Africa, and a founder and director of the itSMF International. He is currently on the itSMF US Board.

David has also participated in the ongoing development of the ITIL and the Microsoft Operations Framework (MOF). Most recently he has co-authored the Service Operation book for ITIL V3.

Ashley Hanna

Ashley is ITSM Practice Principal for HP Mission Critical Services.

He started his IT career as a programmer 26 years ago and moved into IT Service Management in 1993. He is now responsible for the design and implementation of ITSM consultancy services and annuity support contracts within HP.

Ashley is internationally recognized as a leader in the ITSM industry and as a contributor to ITIL V2, itSMF publications and MOF. He also assisted in developing and implementing the itSMF's ISO/IEC 20000 Certification and Qualification Schemes. He is a lead trainer and examiner for itSMF's ISO/IEC 20000 qualifications. Most recently he co-authored the ITIL V3 Glossary of Terms, Definitions and Acronyms.

Ashley is a Fellow of the Institute of Service Management and currently serves as Vice Chair of the

UK itSMF Publications Committee, a member of the UK itSMF Qualifications and Certification Committee, and represents the UK on itSMF International's Publications Committee.

Stuart Rance

Stuart is currently the worldwide lead of the Service Management practice at HP, where he is responsible for knowledge management, and for breaking down barriers to enable business units to work together more effectively.

Stuart delivers a wide range of services to HP customers in the UK and other countries, with a focus on service management assessment and gap analysis, designing and managing service improvement programs, developing and implementing service management processes, as well as security assessments and improvement planning.

In addition, Stuart is a Fellow of the Institute of Service Management, and is a CISSP (Certified Information Systems Security Professional). He is one of the authors of the ITIL V3 glossary, and is very active in the itSMF, where he is a member of the UK Executive Subcommittees for Publications and for Qualifications & Certification. He is the author of a number of Pocket Guides for itSMF UK, including "Planning and Achieving ISO/IEC 20000" and "Security Management." Stuart played a lead role in helping to develop HP's portfolio of mission critical and proactive services, including the recently launched ITSM Assessment Services.

Stuart has many years of experience in a wide variety of roles within IT Services. Currently, he teaches a range of ITIL and ISO/IEC 20000 courses, and is a member of the ISEB examination panel for the ITIL

Infrastructure exam. He also develops and delivers a range of technical and process training courses for internal and customer audiences.

Early in his career, he filled a wide variety of roles in support functions, including capacity and availability management, incident and problem management, and hardware and software technical support.

David Wheeldon

David is one of the industry's most experienced ITIL consultant/trainers. He has spent the last ten of his 20-plus years' experience in the IT industry working as a strategic-level consultant, specializing in ITSM.

He worked for the UK Government and was author of many of the original ITIL books. He was founder and Secretary of the itSMF and Chairman of itSMF International and is now Honorary Vice-President. He is the ISEB's Chief Service Management Examiner.

More importantly, David has had extensive experience over more than 25 years of planning and implementing IT Service Management for a wide range of organizations in all market sectors. He has lectured extensively on this subject in more than 40 countries. He is the joint architect of HP's global ITSM Assessment Service and the Customer-One service and has delivered more than 30 such assessments worldwide.

Today David serves as Director of IT Service Management for HP Education in the EMEA region. He is currently involved in a wide range of high-profile projects for clients in several countries.



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