White Paper:
Lessons Learned – A Personal Account of a Continual Service Improvement Journey

This article is written from the perspective of “time in the trenches” from an ITSM Program Director. The success of IT Service Management (ITSM) and its rate of adoption is directly impacted by the level of buy-in within the Information Technology (IT) organization. The right approach to Continual Service Improvement (CSI) can increase buy-in and enable every IT resource to get involved.

The Landscape

First, Continual Service Improvement (CSI) in simple terms is a wrapper around IT services, processes, and technologies supporting the business. The primary focus of CSI is to ensure:

- The processes meet the needs of the business and provide value
- The processes are meeting their goals at the desired level of quality
- The processes are efficient, and
- The processes are being followed or becoming anchored into the environment.

This was an opportunity to design and implement a CSI program in a “green field” situation. Essentially, this involved working with IT executive leaders to establish a structure for process management, educating and then empowering designated Process Owners to lead the charge, and personally serving as a Player/Coach in support of a large-scale culture change.

So, you might be wondering, “What fueled the effort?” Simply, the organization was focused on improving the quality of IT services. The visibility started at the business ownership level with the goal of ISO 9001:2000 certification within designated IT groups. Since this effort encompassed only part of IT in the original scope, the teams that were involved understood the importance of their efforts toward paving the way. The business focus on quality established the reason for these IT resources to take a bold step forward and begin to work differently… to move toward a service-oriented model instead of the traditional IT functional silos.

While CSI is not a “one size fits all” topic, the points captured below are intended to highlight primary lessons learned, which most organizations embracing CSI and culture change should find valuable.

Lessons Learned

**Lesson #1: A visible business driver is a “must have”**. Since continual improvement of anything takes time and commitment, it also requires new skills, a more open approach to sharing information, and people working together toward a common goal. None of these are small endeavors. As a result, it’s critical for a visible business initiative to be the reason behind the change. As mentioned above, ISO 9001:2000 was the
primary business driver for reaching a new level of quality in the organization where solutions were needed in support of the certification goal.

**Lesson #2: IT Executives and key stakeholders want to participate in the solution.** When a visible business initiative is influencing priorities and requiring behavior changes (especially when they’re required among the executives), these leaders in particular want to be involved with solution development. Perfect! We all know that executive sponsorship is required for IT Service Management. This is the prime time to execute your strategy, so make sure you have one ready when you need it, a strategy that provides a clear line of sight between the immediate needs and the long-term service-oriented approach.

**Lesson #3: A common language and education is important.** The core leaders and solution developers must be able to communicate and speak about things using the same terms and definitions. Without this, there will likely be a waste of resource time and energy. ITIL education can enable this common language and learning can happen in a variety of formats: awareness sessions, foundation courses, advanced courses, and simulation exercises. All of these options were used to ensure the broad audience was reached. This provided educational flexibility to focus more detailed knowledge to the Process Owners, improvement teams, key IT leaders, and influential stakeholders while still reaching out to the larger IT community and to critical business partners.

**Lesson #4: Get to know the people.** Begin with a clear understanding of the IT organization, roles, and the levels of authority of the IT leaders – get to know the key stakeholders. Begin with a general understanding of how the organization functions at both a team level and an individual level. Use this information to build partnerships, to manage expectations, and to design the best solution. These key stakeholders must support the approach, so understanding what’s important to them and whether they are on board is paramount.

**Lesson #5: Have a plan and make it intentional.** Don’t wait until you need a plan to write it down! Time spent regularly on strategy and documenting the execution activities is time well spent. I began selling the recommended approach with the key stakeholders (who all spoke the same language now) and sharing the holistic perspective with them. Implementation began once they bought into the solutions and their thumbprints were on it (yes, they tweaked the solution in the areas that were most important to them). Process Owners and improvement teams were established. These resources were empowered to improve services and were expected to collaborate cross-functionally through process teams consisting of people from many technical domains.

**Lesson #6: Think big, start small to effect change.** Sometimes the focus for improvement starts with processes and as the service-oriented culture becomes more anchored into the culture, the focus will tend to shift toward service-based metrics and improvements. This is a natural evolution and is to be expected. As with any change, it’s necessary to put a stake in the ground, start moving toward the defined direction, and adjust as you move forward. The key is to set the direction for the people, get their buy-in, and then get out of the way. Buy-in is twofold:

1. Ensure the Process Owner role is assigned to the right resource – the appropriate level of leadership, experience, skills, and education about the desired approach. The right level of
“people” skills is required to lead diverse teams in a matrix model without direct reporting relationships.

2. Ensure all people involved with the processes and services being delivered have an opportunity to provide feedback, ask questions, to be curious about the results of the CSI program, and to be given an opportunity to contribute to those results. The success and the speed in which an improvement culture is anchored into the environment is directly dependent upon the number of people who contribute toward success. Also, by engaging the broader audience, the program leaders will more easily see which resources are engaged, resulting in easier identification of training opportunities and targeted communications.

**Lesson #7: The value must be evident.** The teams must diligently prioritize their efforts and work together to deliver results. Identification of the quick wins and successfully implementing them really does work! When the people involved understand the line of sight between their efforts and the direct value they have to the business, the people tend to engage at a higher level. Then, they start telling their story. This is when magic begins to happen and the fly wheel starts spinning.

**Lesson #8: Expect results, communicate expectations, and then communicate results.** Establish clear, achievable objectives and wrap a communications program around them. Effective communication requires the message to be delivered 7 times, 7 ways. Determine the framework for the types of communications, the target audiences, and define the accountabilities for delivery. The material can be created one time and used in the context of each designated media. Communication is important to ensure all stakeholders understand the expected results, the roles involved with the CSI program, who is fulfilling those roles, and who can be leveraged to demonstrate the value of continual service improvement. Human nature is that people want to be understood, feel their viewpoint is important, and they are part of something bigger than themselves. The idea is to capitalize on these basic human needs when developing the approach for a communications program in support of CSI and culture change initiatives.

Some of these lessons may not be new to you, but they really do work. They key word is “work”. A focus on continual service improvement often requires culture change… which requires people… which requires strong leadership, time, dedication, and perseverance. If others can do it, you can too!

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