DELIVERING ITSM FOR BUSINESS MATURITY

A Practical Framework

Beverly Weed-Schertzer

EMERALD POINTS

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BY

BEVERLY WEED-SCHERTZER

ISOQAR certified
Management System,
awarded to Emerald
for adherence to
Environmental
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INVESTOR IN PEOPLE

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ABOUT THE AUTHOR

Beverly Weed-Schertzer is a high-performing Business Technology Leader specializing in Information Technology Service Management (ITSM), IT Governance, ITSM Process Design and Optimization, Service Operational Excellence, Service Desk Optimization, Organizational Transformation, and Quality Assurance. She has a knack for integrating technology with business to perform as a team. For more than 25 years, Beverly has led operational and strategy teams for service excellence and business maturity.

Beverly's career in IT started in Service Operations and she considers it her home in IT. She has a passion and flare for the industry and works with IT professionals to better their environments and position their units to be a strategic force in their organizations.

Beverly is the creator of The Art of Practicing Yoga in ITSM© and leads Executive ITSM Consultancy at edifyIT, LLC, a company she founded in 2009. She has delivered a wide spectrum of ITSM consultancy services for businesses. She demonstrates compelling ITSM understanding, knowledge, and abilities.

Beverly is a qualified master in ITSM holding certifications in ITIL V2, and V3, delivering successful real-world adoptions in service management across the business. She is experienced in ISO 9000/9001 and ISO 20000, CoBIT®, GxP, and Lean Six Sigma®.

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PREFACE

To begin, let's explore what Information Technology Service Management (ITSM) is. To put it simply, ITSM functions as a disciplinarian for technology providers. Service Management practices have been around for decades but they weren't formally carried out with Information Technology (IT) providers. They were mostly used by Call Centers or any customer-facing role or function in the business. Service Management's primary focus is the customer and is the best method to continually improve the customer experience. Before the birth of formal frameworks for ITSM, businesses were continually looking for ways to enhance the customer experience using technology services.

In my work, there is a reliance on public knowledge to enhance IT processes, help them to be more efficient, and make improvements to them that boost quality. However, using public knowledge over time, I realized a major aspect was missing. Making enhancements in a technical environment presented many real-world challenges not addressed in books. When faced with non-text book scenarios, I came to rely mostly on business insight, skills, and experience. Knowledge and understanding of the business environment made a significant difference to overcome these challenges. What I learned is ITSM guidance for IT worked, but only so far. When using ITSM guidance in combination with business management experience, they performed better and also had an effect on maturing business operations as well.

I am perplexed that in my IT career across three decades, the industry is still struggling to accomplish Service Management successfully. From experience, I believe it has more to do with how IT sees themselves rather than the advancement of technology. Indirectly, IT views themselves as outsiders to the business. There is a sense that IT needs significantly different methods than the business to manage their operations. In reality, they do not. When I realized this, my focus shifted from technology management to transforming IT to be a strategic unit in business. I began to draw on my business management experience and surprisingly my yoga education as well. Both have provided me with practical methods to overcome the same challenges and obstacles that I encountered over and over.

Prior to shifting focus toward business, my thoughts on value became almost obsessive. The mantra recorded in my brain – value is based on customer perception became a staple in delivering better support services. This mantra lacked sufficient substance to enrich operations and the customer's experience. Measuring value on perception alone isn't reliable; but it does point out something that needs attention. Understanding your customers' behaviors provides more knowledge about them than their perception. Perception changes rapidly and it can realistically change many times in the course of a day. Behaviors are usually a pattern and do not change rapidly. Therefore, behaviors are better to focus on and recognize; it isn't realistic or practical to manage perception.

My thinking began to shift and it inspired me to seek out alternative solutions that make practical sense. My frustration in finding practices that worked, led to more practical approaches that some may consider unconventional. Formal frameworks are missing the target. Why? Because the approaches to serve one size fits all, obtaining the be all-to-all solutions, or the notorious silver bullet are illusions to figure

out. Focusing on what is real and practical exceeds expectations for business maturity, growth, and stability.

I worked with many successful organizations across South-Central and East Asia, Europe, and the United States. The industries I mostly worked in are: telecommunications, healthcare, finance, insurance, manufacturing, and retail. From these environments, I learned valuable lessons and picked up real-world practical knowledge about actual ITSM achievement. That's what motivated me to write this book and share my experiences with practical methods that helped many companies to succeed.

The industry considers People as the main correlation to ITSM achievement or failure. Lately, the people element has lowered on the priority scale. Less attention to people simply isn't realistic for real-world achievement and sustainment of a high-performing ITSM program. The human element is vitally important to succeeding in ITSM and business. People create a natural alliance in business and this is one essential area of attention to practical ITSM.

Technology gets outdated quickly. People, on the other hand, never go out of style and are the reason why businesses succeed.

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I'd also like to thank my mentors, leaders, and colleagues that I've had the honor to work with along my professional path for they have challenged me and shared valuable learning experiences and knowledge that has motivated and inspired me to write this book. Without them, this book would not be possible.

I would like to extend an invitation to Information Technology (IT) professionals, who read this book to break free from old technically focused beliefs and have the courage to be authentic with customers. Create an organizational culture that cultivates authenticity, change, and growth. Be the business and wear it proudly.

I would like to acknowledge IT professionals for their astounding expertise and knowledge for which their work has enabled the creation of this book. Without their hard work and dedication in their roles, the adoption of Service Management could not surpass the theories to reach success.

In addition, I extend many thanks to ITSMf® for the work they do to support IT Service Management professionals and to Emerald Publishing for providing the platform to share my book with the public.