Newcastle University IT Services

Introduction:

Since April 2011, Sharon Mossman has been the Service Process Manager in the IT Service at Newcastle University. The IT department consists of around 160 staff, serving about 5,200 University staff and in excess of 22,000 students. Sharon's role encompasses the management of three teams: the IT Service Desk which provides a full first-line IT support service via telephone, email and online contact methods; the Cluster Room Support (CRS) team which provides first-line face-to-face support and some email support for students and staff; and the Service Process team responsible for developing, supporting and embedding ITIL processes and maintaining the IT service management (ITSM) system. The Service Desk and CRS teams total about seventeen full time employees. The Service Process team is four full time employees.

Sharon has around 30 years of experience in IT in a broad range of customer service and technical team management, process improvement, and system implementation/project management roles, working in a diverse range of organizations including small software companies, local authority, large multi-national companies and higher education. An ITIL service manager since the 1990s, she has remained committed to the principle of 'adopt and adapt' which has supported her in the implementation and improvement of ITSM processes in these organizations. She is also a PRINCE2® practitioner.

Adopting ITIL:

What business challenges were you trying to solve with the help of ITIL?

When I first came to Newcastle University, the IT department had already made some efforts to adopt some ITIL processes, with simple Incident and Major Incident management processes in place, and a draft service catalogue. However, it was clear that we were missing opportunities to learn from our experiences, and improve management of services. I wanted to start by laying some foundations that would allow us to improve how we work over a period of time, at a pace that would work for this organization.

What technical (IT) challenges were you trying to solve with the help of ITIL?

The main challenge was controlling change management. We have lots of highly skilled and experienced staff, all working hard to maintain increasingly complex IT services, but we had no central IT change management process and no visibility of the changes that were happening to systems and services. This predictably led to outages, clashes of interest, frustration, and poor communication all round.

How did you hear about ITIL?

I've been an ITIL Service Manager for many years, starting with ITIL v2, and took the bridging course to v3 about four years ago. I heard about ITIL from a former manager who was an ITIL advocate - he suggested I undertook Foundation training in the 1990s.

Did you have an ITIL ‘eureka’ moment?

A couple of sentences in the ITIL v2 section on availability management really hooked me and drew me into it - I still quote these words today when delivering ITIL awareness sessions:

- Availability is at the core of customer and end-user satisfaction
- When things go wrong, it is still possible to achieve customer and end-user satisfaction.

This got me thinking about the benefits of using common processes and good practice to deliver predictable services, with everyone aiming for the same end-goal of customer satisfaction.

Has ITIL training been useful to achieve your goals?

It’s very useful to have a thorough understanding of the concepts and principles that underpin ITIL, however I would never advocate slavishly following the books as they are written - one of the things that I really like about ITIL is that it encourages people to ‘adopt and adapt’.

We’ve committed to several aspects of ITIL training, which has worked well for us; the Service Process team are all ITIL experts, Service Desk, CRS and several other teams (overall, well over half of the department) have completed Foundation training, and there have been several ITIL overview sessions run for anyone who wants to attend.

Why did you choose ITIL rather than some other methodology?

ITIL is appealing because of its adaptability to suit the organization you work in - I’ve worked with ITIL in a number of very different organizations from large multi-national companies through to higher education, and they all have different cultures and organizational needs. The flexibility of ITIL works to support organizational change (related to IT service management processes) as long as the practitioner remembers that it’s not ‘one size fits all’.

How did you approach ITIL’s adoption?

In Newcastle University, after I’d made an initial assessment of ITIL maturity, I started by completing the initial service catalogue work, making sure it was integrated into our ITSM system so that all tickets were logged against a service with appropriate categories and prioritization, and went a bit further by introducing the concept of service ownership.

The purpose of this was to provide a foundation for all other processes to build upon. Cultural engagement was extremely important so I spent some time working with the service owners to introduce the role and firm up the responsibilities of service ownership.

The next piece of work was to review and improve the existing Major Incident management process - this allowed me to test whether service ownership was understood and to make adjustments, whilst at the same time to start to gather some simple metrics to help inform what we should do next.

Most recently we’ve developed and implemented our first problem management and change management processes.

What push-back have you felt when adopting ITIL?

In the University, I haven't experienced a great deal of push back, which was a bit surprising as change is rarely easy for everyone in a department to accept. However, I've been pleasantly surprised by people's willingness to 'give it a go'. We don't have universal acceptance and support, but engagement is much better here than in many other organizations that I'm aware of.

In other organizations I've seen resistance mainly from two angles: firstly from technical teams concerned that 'process' and 'control' mean the same as 'bureaucracy' and 'constraint', and secondly from senior management who might not understand enough about the potential benefits to fully support it, preferring to sit on the fence and wait to see what happens. The latter can be much more destructive than the former, in my view, as tacit support and involvement of senior management is critical to the success of any business change.

What were the biggest challenges when adopting ITIL?

Initially it was in gaining trust - I was very keen to ensure that it was understood that good practice and processes are not designed to make life difficult or to uncover issues in order to find someone to blame. I've worked very hard to instil a 'no-blame' culture which I'm pleased to say really works, focusing instead on how we can learn from our experiences; however that doesn't happen overnight.

What would you have done differently?

I would like to have been able to implement our change process much sooner than we did, as the potential benefits are huge.

What went right?

The new Major Incident process was an early success which gave us some simple analytics and 'lessons learned' information. This helped us to see that the top two causes of MIs were through third-party actions and through poorly managed changes. We were able to address the former pretty quickly, dramatically reducing the number of IT incidents caused by inadvertent actions of third parties within a few weeks, and although we didn't implement a full change process immediately we were able to set up some interim supporting tools such as a change calendar which helped with visibility of planned changes. This process also helped by getting people together to talk about service-related issues - all part of improving communication and instilling a service-oriented culture.

How (specifically) did ITIL make it easier to put things right?

Common terminology really helps. Simple things such as understanding the difference between an incident and a problem make a real difference in handling day-to-day issues and improving how we do things.

What achievements are you most proud of?

I was pleased to finally get the first iteration of the full change process launched (September 2014), and the Major Incident process has been incredibly useful. We've also implemented a new ITSM system over the past couple of years, and we're now in a very good position to build our ITIL maturity using the tool to support us. The work we've done over the past few years has really helped us to improve the quality of service provision to our customers; this is evidenced by recently gaining the Service Desk Institute certification at 3-star level, about which we're absolutely delighted.

ITIL's Continuing Use:

How do you currently utilize ITIL?

We have Incident (incorporating Major Incident), Service Request, Problem, and Change management processes, at varying degrees of maturity. We are now ready to review our service catalogue and in turn this will feed into further improvements in our ITSM system. We have end-user self-service and a knowledgebase which we will continue to develop.

Is everything perfect now?

No! I wouldn't expect it to be - there's always something to review - that's why we have CSI!

What are the current challenges?

Better end-user self-service - we want customers to get the very best service we can offer and this means focus on the front-line. Improving communication is always on the agenda, and we will continue to work on that. KPIs, reporting, better use of data is another area of focus. Embedding the change process and more engagement with service owners will also be important.

We also take into consideration input from customer satisfaction surveys and other customer engagement forums, from auditing and benchmarking such as the SDI, and suggestions that come up in (for example) major incident reviews.

What other methodologies are you using?

Nothing specific, although in the past I've used ITIL alongside ISO9001 and COBIT.

How do these different methodologies work together?

They should be seen and operated as complementary and not conflicting.

What plans do you have for the future?

Plans include integration and ongoing development of toolsets, continual improvement of existing processes and better visibility of information relating to performance and quality.

What are your recommended Best Practices?

Top five ITIL should do

- Engage early with the people who will be working with and within the processes; consult and include them in process development decision-making wherever possible
- Communicate (use a RACI model)
- Set out the planned benefits (ROI) for each stage and ensure you review to show how well they've been achieved; use this information to inform next stage planning and to celebrate success
- Work with the culture of the organization (not against it)
- Review and improve - it's never finished.

Top five ITIL don't do

- Don't do it all at once - find the biggest pain points and try to address those first
- Don't aim for perfection - do the best possible within a defined timescale, then improve
- Don't be afraid to ask for help - there are so many resources and forums, lots of help and support available
- Don't be daunted if something doesn't work - there's usually another way
- Don't be a slave to the book - take advantage of 'adopt and adapt' and make it work for your organization.