



Microsoft System Center

Optimizing Service Manager

Thomas Ellermann ▪ Kathleen Wilson ▪ Karsten Nielsen ▪ John Clark
Mitch Tulloch, Series Editor

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Foreword

A high percentage of Microsoft System Center 2012 Service Manager projects don't deliver on their promises as they should. While each Service Manager implementation has its own unique challenges, all the successful projects share certain common attributes and experiences. In this book, the authors, Thomas Ellermann, John Clark, Kathleen Wilson, and Karsten Nielsen, who collectively represent close to 60 years of IT consulting experience, express this sentiment and provide a blueprint to help deliver successful Service Manager implementations. This is an undertaking of immense value to the community, and I am honored to be writing this foreword and to recommend the book.

This book is not just for new Service Manager projects. The information presented here benefits existing implementations that are in dire need of optimization. This book is also not a substitute for obtaining detailed knowledge on Service Manager technical information or attending training sessions on Service Manager.

This book is about the organizing principle of Service Manager projects and the various roles in the organization that impact the project. In my experience talking to customers, choosing an ITSM solution today is one of the most difficult challenges facing an IT organization. There are close to 350 vendors claiming this space. Coupled with build-your-own alternatives and an ever decreasing IT budget, a host of certifying bodies, analyst recommendations, and the reality of the disrupting effect of the cloud technologies, selecting an ITSM solution becomes a daunting task, even for the experts. The authors of this book understand this complexity. They have taken the lessons from successful Service Manager implementations and have created a framework that can be leveraged by various stakeholders in an organization to move the needle toward a service oriented delivery model.

Any product so pivotal to changes in business process is bound to have its share of shortcomings. Service Manager is no exception, and the authors explicitly call on the dependencies and shortcomings of Service Manager, making it easier for you to make informed choices. The authors further call on you to challenge your assumptions and pave an improved path to efficiencies that come with automation and standardization.

This book will offer you at least three benefits: You will learn about the capabilities of Service Manager and how it can help you transform service delivery in the modern service-centric business. You will learn how to plan and prepare a Service Manager project. Lastly, you will learn to optimize your current implementation, know about the partner solutions in this space, and improve the productivity of your offerings.

I enjoyed the book and found it valuable. I hope you will, too.

Ranganathan Srikanth

Principal Program Manager, Windows Server System Center (WSSC) at Microsoft Corporation

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Introduction

Welcome to *Microsoft System Center: Optimizing Service Manager*. We (the authors) all work with systems management at Microsoft and believe that the Microsoft System Center suite is one of the most integrated suites on the market for this purpose.

Microsoft System Center 2012 Service Manager is the only product that can integrate across most of the System Center suite and Active Directory. Service Manager is a fast and reliable product that can create and maintain a dynamic service management database to enable interaction across the organization, both inside and outside the IT department, making it a very compelling product to many organizations.

Over the last several years, more and more customers have implemented Service Manager, either independently or via Microsoft or a partner. Sometimes the project and product implementation are not as successful as they should be. Our objectives with this book are to provide you with a framework for planning and delivering a successful Service Manager project and to share some of our experiences and best practices when it comes to optimizing and maintaining your Service Manager environment.

This book is written with three different roles in mind: business and technical decision makers; IT architects; and Service Manager administrators. You can either read this book in its entirety from A to Z, or you can follow one of the learning paths below depending on your role:

- Business and technical decision makers:
 - Chapter 1 Business reasons to choose Service Manager
 - Chapter 2 Deployment costs and non-IT usage
- IT architects
 - Chapter 3 How to plan for Service Manager
 - Chapter 4 How to prepare for a Service Manager installation
- Service Manager administrators
 - Chapter 5 Management packs
 - Chapter 6 Optimizing the Service Manager environment
 - Chapter 7 Service Manager configuration and customization

About the companion content

The companion content for this book can be downloaded from the following page:

<http://aka.ms/SCserviceMgr/files>

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How to plan for Service Manager

Planning for Microsoft System Center 2012 Service Manager is critical since implementing Service Manager will have an impact on both the IT department that supports the organization and on the customers who subscribe to the services that IT provides. This chapter outlines the three most important areas to address prior to running setup. The most successful implementations of Service Manager begins with a vision of what the organization wants Service Manager to achieve. This vision must include the three areas that Service Manager will touch: the people who will use Service Manager to perform their roles, the underlying products that Service Manager relies on to populate the configuration management database, and the processes that Service Manager will automate.

It's not just the technology

You should begin your Service Manager journey by focusing first on your organization's people and processes to ensure that you consider the business needs when making the decisions about implementing Service Manager. Service Manager can provide considerable value by implementing an integrated set of IT processes and automation technologies based on Microsoft System Center, a highly integrated solution that helps IT organizations manage and drive efficiencies into very diverse and complex environments.

When implementing Service Manager, first establish a baseline of your current environment and situation. As illustrated by Figure 3-1, implementing Service Manager involves considering the 3Ps: people, processes, and products (tools and technologies). Understanding the current state of these 3Ps can help you see areas where improvements may need to be made.

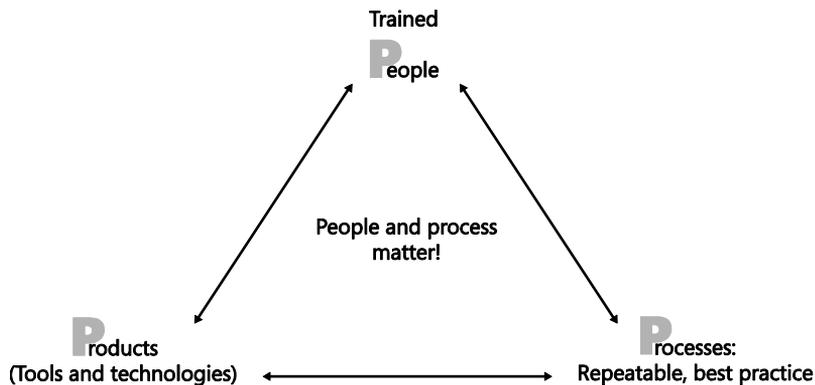


FIGURE 3-1 Understanding people, processes, and products are the key to implementing Service Manager effectively.

People

Implementing any tool in your IT department will have an impact on both the people who work in IT and the people who will use Service Manager. IT Service Management (ITSM) is all about behavioral changes: Attitudes drive Behaviors which result in Culture (ABC). Culture is only an outcome, so if a service and value culture is what your customer or organization is looking for, attitudes and behaviors need to change and adapt to the Service Manager journey.

Executive sponsorship combined with communication and user education is critical to the people aspect of your Service Manager implementation. How do you begin this journey? Like this:

- **Start with the "Why"** The first Why is why are we implementing a (new or replacement) service management solution. Second is, Why is Service Manager being deployed? What is the vision? Ensure all stakeholders not only understand the "Why" but also believe in it. If there is opposition, then the outcome, regardless of tools and processes, will be sub-optimal.
- **Understand the "What"** What processes will the Service Management implementation include? Will a phased approach be taken? What is in scope? What is out of scope? Gain commitment here and communicate and educate the "What" to all parties involved.
- **Implement the "How"** How will Service Management be used to manage ITSM processes and services? How will you configure and deploy Service Manager to support the "Why" and "What" elements?

Assigning customer roles and responsibilities is crucial to the effective implementation of Service Manager. Not getting all the right people involved and committed will put you at risk for experiencing poor adoption of Service Manager. If the key stakeholders and other critical people are not involved early on, they will feel that decisions were made in a vacuum, not

taking into consideration all of IT. Getting everyone on the same page is key, and everyone must participate. Also be sure to involve upper management to avoid snipers/spectators and ensure that the decisions made in workshops are defined and agreed upon by the process owners.

One common mistake is trying to implement all the Service Manager capabilities in one step. If you try to change more than 10 to 20 percent of operational behaviors in your organization with a Service Manager implementation, you risk poor adoption by the people who will be using it. Implementing Service Manager in small phases or by a staged process method is a better approach as incremental, ongoing, short-term improvements have been shown to have more success and sustainability than massive, organizational flips with a single-tool implementation.

Ensure all parties involved in the Service Manager implementation are empowered to make decisions. Employees must be empowered with responsibility, authority, and tools to succeed with their Service Manager journey. Executive sponsors must also empower the Service Manager project team.

Define critical success factors, key performance indicators, and metrics to measure staff, for example their compliance and contribution to ITSM programs. Define your success metrics early in the program and ensure that you measure them during the implementation and review and make adjustments as necessary.

View service management and improvement as a project with a definite end date. Service Management is a cultural change, so it takes time and can't be rushed. Continual service improvement is an ongoing exercise, and Service Manager provides the platform to enable this journey.

Another key element is training; never dismiss this as unimportant. Many organizations believe that their smart IT people will just know how to use Service Manager. They believe that their customers can go to the Self Service portal and figure out for themselves how to use Service Manager. This is simply not true, however, so defining a training plan that identifies all the audiences that will use Service Manager, creating the training by audience type, and then delivering that training to those who will use Service Manager are all essential. Carefully consider and plan both the initial training of your organization and the ongoing training for new hires. Such training must be part of the implementation and ongoing operations of Service Manager.

Process

The power of Service Manager is its ability to integrate and automate IT processes and technologies across both human and system resources in a consistent and coordinated fashion. To gain benefit from this, ITSM processes must be documented and understood by your organization. Unfortunately, many organizations haven't documented their processes adequately. Before implementing Service Manager, understand, document, and review the

current processes.

Figure 3-2 illustrates the Microsoft Infrastructure Optimization Model, which has been developed using industry best practices and Microsoft's own experiences with its enterprise customers. It is based on Gartner's Infrastructure Optimization Model (IOM), which in turn is based on MIT's Architecture Maturity Model. A key goal for Microsoft in creating the IOM was to develop a simple way to use a maturity framework that is flexible and can easily be used as the benchmark for technical capability and business value.



FIGURE 3-2 Microsoft Infrastructure Optimization Model for IT organizations.

The IOM helps customers understand and subsequently improve the current state of their IT infrastructure and what that means in terms of cost, security risk, and operational agility. Dramatic cost savings can be realized by moving from an unmanaged environment toward a dynamic environment. The goal of Service Manager is to have the IT Infrastructure move from a highly manual and reactive state to a highly automated and proactive state. Also the processes will move from fragmented or non-existent to optimized and repeatable through documentation and automation with Service Manager. The end result is that the IT organization will improve their business agility and deliver business value increases as they move from the Basic state up toward a Dynamic state, empowering information workers and managers and supporting new business opportunities.

Product

Most Service Manager implementations involve the replacement of an existing ITSM tool. Many organizations already own Service Manager as part of their System Center licensing agreement, and they can therefore see moving to Service Manager as a potential cost savings measure. Unfortunately, many organizations also try to make Service Manager act and behave like their current ITSM tool without examining the business needs and service management requirements of their organization.

The following list outlines some of the product issues and challenges that organizations face when implementing Service Manager:

- **Deploying Service Manager without specific objectives** IT systems, including ITSM systems, should meet a clear set of objectives. The first question to be answered is, Why are we implementing Service Manager? This allows for the objective determination of success or failure and allows for decisions to be made before large sums of money are spent on deployment.
- **Looking for Service Manager to meet a functional list, for reasons of cosmetics or neatness, or to ensure ITIL compliance** Technology is intended to underpin and automate some or all of an organization's processes. There should be both test of efficiency and test of effectiveness measures that support the business mission.
- **Implementing Service Manager without assigning post-project resources and funds** Service Manager requires maintenance and ongoing support and improvements to meet the organizational needs for the ITSM journey.
- **Focusing on configuration management without a service context** Perhaps one of the biggest areas of failure in ITSM is configuration management. The value runway is very long, it is typically discovery-only focused, and often it does not align to services and capabilities of the organization. A successful CMS/CMDB answers the questions of accountability (who, what, when) and relationships. Start with the out of box capabilities of the Service Manager CMDB. By linking configuration items (CIs) to work items in Service Manager, you will quickly improve your incident and change management processes and enable problem management.

Customers who implement Service Manager to replace an existing service management tool often focus on phone-based ticket creation and are thus typically disappointed with Service Manager. These old service management tools view everything as a ticket and really don't focus on enabling end users to perform self-service based on a service model. Service Manager enables service-based and automated intake where you need to focus on ruthless standardization, extreme automation, and separation of service requests from incidents. Service Manager therefore does not provide some of the traditional call center capabilities like decision call tree, launchpad for initial intake (before you know what service, incident, request), or quick ticket (although this can be accomplished through templates).

Knowing this, you need to take caution when implementing Service Manager so as not to recreate side-by-side functionality with your existing service management tool or try to make Service Manager act and behave like the tool that you are trying to displace. The discussion should start with why you need Service Manager as a tool. Why are you replacing the incumbent tool? Is it too costly to maintain due to customizations? Is reporting difficult or nonexistent? Are you doing it for cost savings? Or are you just not happy with the current tool?

Next, you must examine "What" outcomes that management needs to achieve with Service Manager. You need to address the business requirements first. Focus on outcomes or "What" the process needs to achieve first; step away from the *methods* discussion on how Service Manager actually does this. The "What" discussion should focus on what Service Manager needs to achieve to make the IT organization successful. Drive the discussion by understanding, documenting, and agreeing first on what are the desired process outcomes. Once these "What" requirements have been documented and agreed upon, move forward with the "How," planning how Service Manager can achieve these requirements. Service Manager has been most successful for customers when they:

- Don't try to reinvent past toolset behaviors and capabilities in Service Manager. Instead they leverage how Service Manager works, specifically the benefits of using the Self Service portal.
- Don't try to implement existing tool capabilities feature by feature in Service Manager. Implementing Service Manager provides a great opportunity to examine the business needs, the processes, and underlying technology to provide better value to the business and the end users.
- Move away from using the term tickets and instead enable service-based intakes via the portal. This enables better routing of requests and incidents since you are leveraging services for ownership and resolution.
- Leverage business services in Service Manager and the importing of distributed applications from Systems Center Operations Manager.
- Use a service catalog on the portal to make navigation and organization of services provided to the business available for self service and end user enablement via automation.

Implementation roles

Table 3-1 lists the roles needed for engagement of the appropriate people in a Service Manager deployment. Not having the appropriate people engaged and involved in the decisions that are made to implement Service Manager puts you at risk for alienating supporters in your organization, when they feel they were not consulted or informed about what decisions were made during implementation. Marketing and communication are key

since everyone in IT will be affected by the implementation, and they must feel that their input was taken into consideration.

The list covers all of the capabilities in Service Manager. Make sure there is a name assigned to each role plus an outline of the time required for these roles. Remove the role types for the capabilities you will not be deploying.

TABLE 3-1 Roles that need to be engaged in a Service Manager implementation

ROLES/ROLE TYPES	RESPONSIBILITIES
Project roles	
Executive Sponsor	Executive who is the key stakeholder of the Service Manager deployment.
Project Lead/Manager	Customer-appointed project manager.
Training Lead	Responsible for the creation of training material for Service Manager. Even IT staff need to be trained on proper use of Service Manager for deployment and ongoing training needs for IT.
Communication Lead	Creates the communication plan and ensures timely communication on project status and next steps.
Reporting Lead	Will own the reporting requirements and ensure that reporting is managed after the engagement ends.
Process roles and subject matter experts (SMEs)	
Incident Management	Owns the incident management process and makes the Service Manager tooling decisions pertaining to incident management; include the help desk and tier 2 and tier 3 resources.
Problem Management	Owns the problem management process, makes the Service Manager tooling decisions on how problem management is performed.
Change Management	Drives the tooling requirements in Service Manager; they understand the approval processes and what types of changes need to be implemented in Service Manager.
Release Management	Release managers can also include project managers as they really know how release management works in the organization.
Service Request Fulfillment	Service requests could extend outside of IT, to include facilities, HR, and other groups needed to fulfill service requests and to understand how service requests are completed.
Service Level Management	Discussions around what SLAs are in place will require service level managers, and, if they own the service catalog, they will drive the service catalog on the Service Manager portal.
Configuration Management	The configuration management process owner will drive what decisions regarding the management of configuration items in Service Manager.

Technology roles	
SQL SME	If you are going to need assistance with SQL for the deployment of Service Manager, be sure to engage an expert early in the project lifecycle.
Exchange SME	Exchange connector and SMTP needed for Service Manager.
AD SME	For assistance in understanding how Active Directory is deployed and how to configure the AD connector for optimal data import.
SCOM SME	To understand how Operations Manager is deployed, what management packs and distributed applications are in the environment to import.
SCCM SME	For expertise on how Service Manager can be deployed and whether asset intelligence has been deployed correctly to get the correct CI information.
SharePoint SME	You need to deploy the Service Manager portal, and if you need customization of the portal, this person is your best resource.
SCSM Infrastructure Lead	This person is going to be attached to your hip throughout the deployment of Service Manager. They need to do the bulk of the work during deployment as they will be responsible for managing Service Manager when you leave. Ensure that this person is available to you for the entire time you are on site.