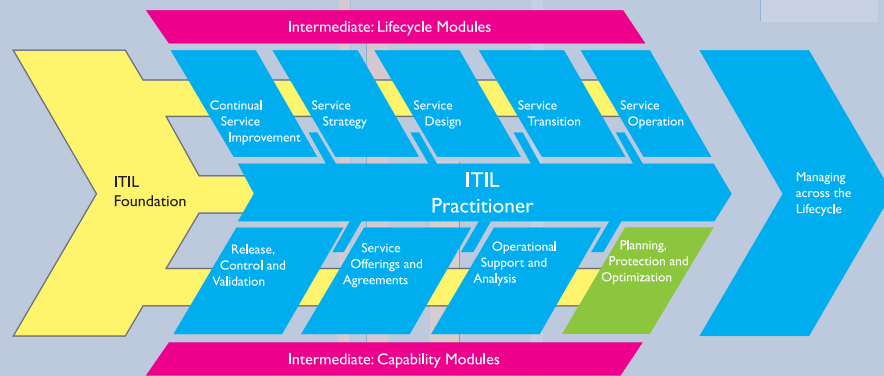


# ITIL® Intermediate Planning, Protection and Optimization

## Courseware

- Continual Service Improvement
- Service Strategy
- Service Design
- Service Transition
- Service Operation
- Planning, Protection and Optimization
- Operational Support and Analysis
- Service Offerings and Agreements
- Release, Control and Validation
- ITIL Practitioner
- Managing, Protection and Optimization



## Colofon

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# Welcome to

## Planning, Protection and Optimization

### The ITIL® Capability Qualification

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## Learning objectives

- ✓ ITIL and Service Management – Overview
- ✓ Introduction to PPO
- ✓ Processes
  - ✓ Capacity Management
  - ✓ Availability Management
  - ✓ IT Service Continuity Management
  - ✓ Information Security Management
  - ✓ Demand management
- ✓ PPO Roles & Responsibilities
- ✓ Technology and Implementation Considerations

Course Introduction  
- Objectives



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## The examination

- ✓ Eight questions
- ✓ 90 minutes (+30 minutes if English is not your native language)
- ✓ Four answer options worth 5, 3, 1 or 0 marks
- ✓ Pass: 28/40

Course Introduction  
- Exam

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# Passing the examination

Course Introduction  
- Exam

During the course

- ✓ Pay attention
- ✓ Ask questions if things aren't clear
- ✓ Be active during the exercises

At home

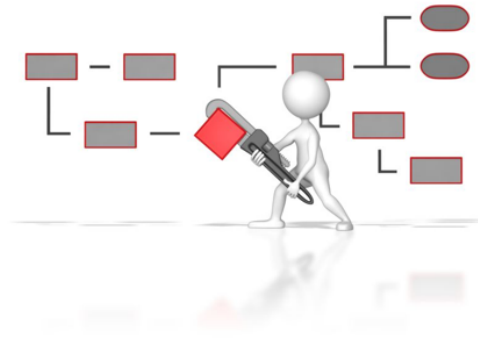
- ✓ Study the presentation material
- ✓ Study the core books
- ✓ Do the sample exams



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# ITIL and Service Management overview



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## ITIL and Service Management Overview

# The ITIL Toolbox



ITIL and Service  
Management

- ✓ The ITIL Core (5 books)
  - Best Practice guidance applicable to all types of organizations who provide services
- ✓ The ITIL Complementary Guidance
  - A set of publications with guidance specific to industry sectors, organization types, operating models and technology architectures
- ✓ The ITIL Live
  - An interactive expert knowledge center
  - Subscription based

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## SO 1 Introduction

ITIL is part of a suite of best-practice publications for IT service management (ITSM). ITIL provides guidance to service providers on the provision of quality IT services, and on the processes, functions and other capabilities needed to support them. ITIL is used by many hundreds of organizations around the world and offers best-practice guidance applicable to all types of organization that provide services. ITIL is not a standard that has to be followed; it is guidance that should be read and understood, and used to create value for the service provider and its customers. Organizations are encouraged to adopt ITIL best practices and to adapt them to work in their specific environments in ways that meet their needs.

ITIL is the most widely recognized framework for ITSM in the world. In the 20 years since it was created, ITIL has evolved and changed its breadth and depth as technologies and business practices have developed. ISO/IEC 20000 provides a formal and universal standard for organizations seeking to have their service management capabilities audited and certified. While ISO/IEC 20000 is a standard to be achieved and maintained, ITIL offers a body of knowledge useful for achieving the standard.

In 2007, the second major refresh of ITIL was published in response to significant advancements in technology and emerging challenges for IT service providers. New models and architectures such as outsourcing, shared services, utility computing, cloud computing, virtualization, web services and mobile commerce have become widespread within IT. The process-based approach of ITIL was augmented with the service lifecycle to address these additional service management challenges. In 2011, as part of its commitment to continual improvement, the Cabinet Office published this update to improve consistency across the core publications.

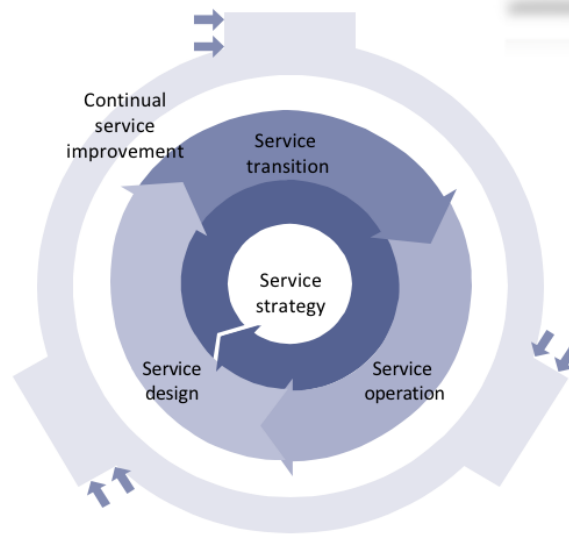
The ITIL framework is based on the five stages of the service lifecycle as shown on next slide with a core publication providing best-practice guidance for each stage. This guidance includes key principles, required processes and activities, organization and roles, technology, associated challenges, critical success factors and risks. The service lifecycle uses a hub-and-spoke design, with service strategy at the hub, and service design, transition and operation as the revolving lifecycle stages or 'spokes'. Continual service improvement surrounds and supports all stages of the service lifecycle. Each stage of the lifecycle exerts influence on the others and relies on them for inputs and feedback. In this way, a constant set of checks and balances throughout the service lifecycle ensures that as business demand changes with business need, the services can adapt and respond effectively.

In addition to the core publications, there is also a complementary set of ITIL publications providing guidance specific to industry sectors, organization types, operating models and technology architectures.



# Service Lifecycle

- ✓ Processes explain how things are done, whereas structure/phases describes how they are connected
  - Processes can span several lifecycle phases
- ✓ The lifecycle can be described as
  - Integrated approach
  - Iterative and multidimensional



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## SO 1.2 CONTEXT

The ITIL core consists of five lifecycle publications. Each provides part of the guidance necessary for an integrated approach as required by the ISO/IEC 20000 standard specification. The five publications are:

- ITIL Service Strategy
- ITIL Service Design
- ITIL Service Transition
- ITIL Service Operation
- ITIL Continual Service Improvement

Each one addresses capabilities having direct impact on a service provider's performance. The core is expected to provide structure, stability and strength to service management capabilities, with durable principles, methods and tools. This serves to protect investments and provide the necessary basis for measurement, learning and improvement. The introductory guide, *Introduction to the ITIL Service Lifecycle*, provides an overview of the lifecycle stages described in the ITIL core.

ITIL guidance can be adapted to support various business environments and organizational strategies. Complementary ITIL publications provide flexibility to implement the core in a diverse range of environments. Practitioners can select complementary publications as needed to provide traction for the ITIL core in a given context, in much the same way as tyres are selected based on the type of vehicle, purpose and road conditions. This is to increase the durability and portability of knowledge assets and to protect investments in service management capabilities.

## More than just processes

ITIL and Service  
Management

### ITIL Core book contents

- ✓ Introduction
- ✓ Service Management as a practice
- ✓ Principles
- ✓ Processes
- ✓ Organizing – Roles and responsibilities
- ✓ Technology considerations
- ✓ Implementation considerations
- ✓ Challenges, Critical Success Factors and Risks
- ✓ Examples/Templates



# ITIL® Core Books - Strategy

ITIL and Service Management

- ✓ Axis around which the other lifecycle phases rotates
- ✓ Think about **why** something is to be done before thinking of **how**
- ✓ Represents policies and objectives
- ✓ Answers following questions:
  - *What services to offer and to whom?*
  - *How do we differentiate ourselves?*
  - *How do we create value?*
  - *Which capabilities and resources are required and how should they be allocated across services?*



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## SO 1.2.1 Service strategy

At the centre of the service lifecycle is service strategy. Value creation begins here with understanding organizational objectives and customer needs. Every organizational asset including people, processes and products should support the strategy.

*ITIL Service Strategy* provides guidance on how to view service management not only as an organizational capability but as a strategic asset. It describes the principles underpinning the practice of service management which are useful for developing service management policies, guidelines and processes across the ITIL service lifecycle.

Topics covered in *ITIL Service Strategy* include the development of market spaces, characteristics of internal and external provider types, service assets, the service portfolio and implementation of strategy through the service lifecycle. Business relationship management, demand management, financial management, organizational development and strategic risks are among the other major topics.

Organizations should use *ITIL Service Strategy* to set objectives and expectations of performance towards serving customers and market spaces, and to identify, select and prioritize opportunities. Service strategy is about ensuring that organizations are in a position to handle the costs and risks associated with their service portfolios, and are set up not just for operational effectiveness but for distinctive performance.

Organizations already practising ITIL can use *ITIL Service Strategy* to guide a strategic review of their ITIL-based service management capabilities and to improve the alignment between those capabilities and their business strategies. *ITIL Service Strategy* will encourage readers to stop and think about why something is to be done before thinking of how.

# ITIL® Core Books - Design

ITIL and Service Management

- ✓ Design of new or changed services for introduction into the live environment
- ✓ Design of processes, ITSM tools, technical architectures and measurement methods & metrics
- ✓ Business value
  - Improved quality of service
  - Reduced Total Cost of Ownership (TCO)
  - Easier implementation and improved consistency
  - More effective ITSM



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## SO 1.2.2 Service design

For services to provide true value to the business, they must be designed with the business objectives in mind. Design encompasses the whole IT organization, for it is the organization as a whole that delivers and supports the services. Service design is the stage in the lifecycle that turns a service strategy into a plan for delivering the business objectives.

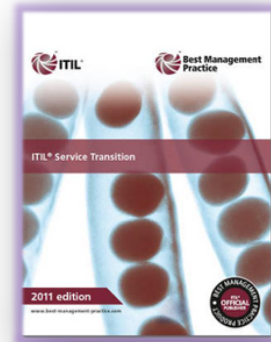
*ITIL Service Design* (this publication) provides guidance for the design and development of services and service management practices. It covers design principles and methods for converting strategic objectives into portfolios of services and service assets. The scope of *ITIL Service Design* is not limited to new services. It includes the changes and improvements necessary to increase or maintain value to customers over the lifecycle of services, the continuity of services, achievement of service levels, and conformance to standards and regulations. It guides organizations on how to develop design capabilities for service management.

Other topics in *ITIL Service Design* include design coordination, service catalogue management, service level management, availability management, capacity management, IT service continuity management, information security management and supplier management.

# ITIL® Core Books - Transition

ITIL and Service Management

- ✓ Move a new or changed service into, or from, operational use within predicted cost, quality and time
- ✓ Establish methods for testing, validating, packaging, deploying or decommissioning a service
- ✓ Business value
  - Ability to adapt quickly to new or changed requirements
  - Reduced disturbance due to inconsistent or failed releases
  - Better prediction of service levels and warranties



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## SO 1.2.3 Service transition

*ITIL Service Transition* provides guidance for the development and improvement of capabilities for introducing new and changed services into supported environments. It describes how to transition an organization from one state to another while controlling risk and supporting organizational knowledge for decision support. It ensures that the value(s) identified in the service strategy, and encoded in service design, are effectively transitioned so that they can be realized in service operation.

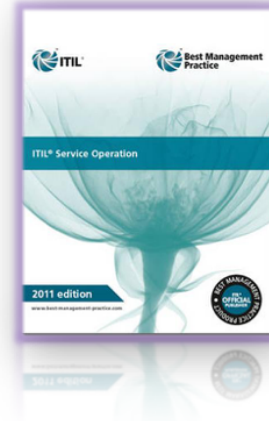
*ITIL Service Transition* describes best practice in transition planning and support, change management, service asset and configuration management, release and deployment management, service validation and testing, change evaluation and knowledge management. It provides guidance on managing the complexity related to changes to services and service management processes, preventing undesired consequences while allowing for innovation.

*ITIL Service Transition* also introduces the service knowledge management system, which can support organizational learning and help to improve the overall efficiency and effectiveness of all stages of the service lifecycle. This will enable people to benefit from the knowledge and experience of others, support informed decision-making, and improve the management of services.

# ITIL® Core Books - Operation

ITIL and Service Management

- ✓ Activities and processes required to deliver and support services at agreed levels of utility and warranty
- ✓ Day-to-day management of the technology, ITSM processes and people used for delivering and supporting services
- ✓ Business value
  - The phase where value to business is realized



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## SO 1.2.4 Service operation

*ITIL Service Operation* describes best practice for managing services in supported environments. It includes guidance on achieving effectiveness and efficiency in the delivery and support of services to ensure value for the customer, the users and the service provider.

Strategic objectives are ultimately realized through service operation, therefore making it a critical capability. *ITIL Service Operation* provides guidance on how to maintain stability in service operation, allowing for changes in design, scale, scope and service levels. Organizations are provided with detailed process guidelines, methods and tools for use in two major control perspectives: reactive and proactive. Managers and practitioners are provided with knowledge allowing them to make better decisions in areas such as managing the availability of services, controlling demand, optimizing capacity utilization, scheduling of operations, and avoiding or resolving service incidents and managing problems. New models and architectures such as shared services, utility computing, web services and mobile commerce to support service operation are described.

Other topics in *ITIL Service Operation* include event management, incident management, request fulfilment, problem management and access management processes; as well as the service desk, technical management, IT operations management and application management functions.