

COURSEWARE

ITIL® 4

Specialist Drive Stakeholder Value (DSV) Courseware

ITIL Master

Managing Professional (MP) Transition

ITIL Managing Professional (MP)

ITIL Strategic Leader (SL)

ITIL Specialist

ITIL Specialist

ITIL Specialist

ITIL Strategist

ITIL Strategist

ITIL Leader

Create, Deliver & Support

Drive Stakeholder Value

High Velocity IT

Direct, Plan & Improve

Direct, Plan & Improve

Digital & IT Strategy

ITIL Foundation

ITIL® 4 Specialist Drive Stakeholder Value (DSV)
Courseware

Colophon

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The objective of the courseware is to provide maximum support to the trainer and to the student, during his or her training. The material has a modular structure and according to the author(s) has the highest success rate should the student opt for examination. The Courseware is also accredited for this reason, wherever applicable.

In order to satisfy the requirements for accreditation the material must meet certain quality standards. The structure, the use of certain terms, diagrams and references are all part of this accreditation. Additionally, the material must be made available to each student in order to obtain full accreditation. To optimally support the trainer and the participant of the training assignments, practice exams and results are provided with the material.

Direct reference to advised literature is also regularly covered in the sheets so that students can find additional information concerning a particular topic. The decision to leave out notes pages from the Courseware was to encourage students to take notes throughout the material.

Although the courseware is complete, the possibility that the trainer deviates from the structure of the sheets or chooses to not refer to all the sheets or commands does exist. The student always has the possibility to cover these topics and go through them on their own time. It is recommended to follow the structure of the courseware and publications for maximum exam preparation.

The courseware and the recommended literature are the perfect combination to learn and understand the theory.

-- Van Haren Publishing

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- Architecture (Enterprise and IT)
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Topics are (per domain):

IT and IT Management

ABC of ICT
ASL®
CATS CM®
CMMI®
COBIT®
e-CF
ISO/IEC 20000
ISO/IEC 27001/27002
ISPL
IT4IT®
IT-CMF™
IT Service CMM
ITIL®
MOF
MSF
SABSA
SAF
SIAM™
TRIM
VeriSM™

Enterprise Architecture

ArchiMate®
GEA®
Novius Architectuur
Methode
TOGAF®

Business Management

BABOK® Guide
BiSL® and BiSL® Next
BRMBOK™
BTF
EFQM
eSCM
IACCM
ISA-95
ISO 9000/9001
OPBOK
SixSigma
SOX
SqEME®

Project Management

A4-Projectmanagement
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Self-Reflection of understanding Diagram

‘What you do not measure, you cannot control.’ – Tom Peters

Fill in this diagram to self-evaluate your understanding of the material. This is an evaluation of how well you know the material and how well you understand it. In order to pass the exam successfully you should be aiming to reach the higher end of Level 3. If you really want to become a pro, then you should be aiming for Level 4. Your overall level of understanding will naturally follow the learning curve. So, it’s important to keep track of where you are at each point of the training and address any areas of difficulty.

Based on where you are within the Self-Reflection of Understanding diagram you can evaluate the progress of your own training.

<i>Level of Understanding</i>	<i>Before Training (Pre-knowledge)</i>	<i>Training Part 1 (1st Half)</i>	<i>Training Part 2 (2nd Half)</i>	<i>After studying / reading the book</i>	<i>After exercises and the Practice exam</i>
<i>Level 4 I can explain the content and apply it .</i>					
<i>Level 3 I get it! I am right where I am supposed to be.</i>					<i>Ready for the exam!</i>
<i>Level 2 I almost have it but could use more practice.</i>					
<i>Level 1 I am learning but don't quite get it yet.</i>					

(Self-Reflection of Understanding Diagram)

Write down the problem areas that you are still having difficulty with so that you can consolidate them yourself, or with your trainer. After you have had a look at these, then you should evaluate to see if you now have a better understanding of where you actually are on the learning curve.

Troubleshooting

Problem areas:

Topic:

Part 1

Part 2

You have gone through the book and studied.

You have answered the questions and done the practice exam.

Course schedule

Day 1:

ITIL® 4 Foundation recap

The customer journey

Step 1: Explore

Day 2:

Step 2: Engage

Step 3: Offer

Step 4: Agree

Day 3:

Step 5: Onboard

Step 6: Co-create

Step 7: Realize

ITIL practices

Exam preparation

Welcome to ITIL® 4 Drive Stakeholder Value



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Our coming days



- ✓ Safety
- ✓ Breaks
- ✓ Lunch
- ✓ Phones/Computers

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Our coming days



- ✓ Active participation!
- ✓ Ask questions
- ✓ Theory (a lot)
- ✓ Some homework
- ✓ Group dialogues

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Presentation



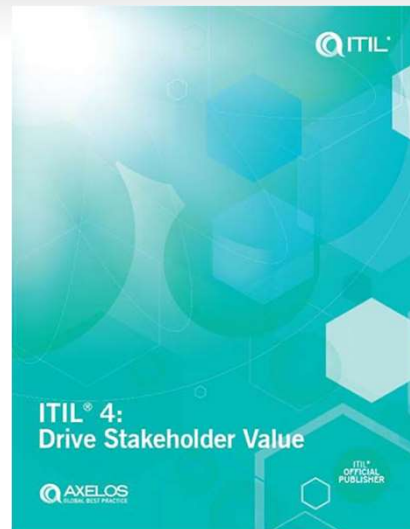
- My questions:
- ✓ Who are you?
 - ✓ What experience do you have from ITIL?
 - ✓ What is your role at work?
 - ✓ What are your expectations?

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ITIL® 4: DRIVE STAKEHOLDER VALUE (DSV)

Understand customer journeys, know how to foster stakeholder relationships, shape demand and services, on- and offboard customers and users to ensure value co-creation



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Drive stakeholder value

Drive Stakeholder Value
Introduction

Drive stakeholder value aims to guide stakeholders, whether they are customers or service providers, through **the principles and practices of co-creating value through services**.

Everyone contributes to value co-creation, including employees from large and small organizations, contractors, and customers. It is important to remember that this guidance is not prescriptive: it will not all be applicable to everyone. This publication is **a framework meant to be adopted and adapted for each individual situation**.

This guide is written for individuals and organizations engaged in **service relationships**, including product and service provision, consumption, and relationship management. These are the people and organizations that are either involved in organizing the customer journey or taking part in it.

This guide **assumes that the reader is familiar with ITIL Foundation**, where the fundamental service management concepts of ITIL 4 are introduced.

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Key learning requirements



DRIVE STAKEHOLDER VALUE

- ✓ Understand how customer journeys are designed
- ✓ Know how to target markets and stakeholders
- ✓ Know how to foster stakeholder relationships
- ✓ Know how to shape demand and define service offerings
- ✓ Know how to align expectations and agree details of services
- ✓ Know how to onboard and offboard customers and users
- ✓ Know how to act together to ensure continual value co-creation (service consumption / provisioning)
- ✓ Know how to realize and validate service value

Course schedule



- Day 1:
 - ITIL® 4 Foundation recap
 - The customer journey
 - Step 1: Explore
- Day 2:
 - Step 2: Engage
 - Step 3: Offer
 - Step 4: Agree
- Day 3:
 - Step 5: Onboard
 - Step 6: Co-create
 - Step 7: Realize
 - ITIL practices
 - Exam preparation

ITIL® 4 FOUNDATION RECAP

Background and a short recap on some fundamentals from ITIL® 4 Foundation



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Introduction

Foundation recap

This section will focus on validating the ITIL® 4 Foundation concepts that are prerequisites for this training. Key areas covered include:

- The four dimension model
- The ITIL service value system (SVS)
 - The ITIL guiding principles
 - Governance
 - The ITIL service value chain
 - The ITIL management practices
 - Continual improvement
- Basic terms and definitions such as:
 - Provider and Consumer
 - Service and Products
 - Service management
 - Service relationship management
 - Value; Outcome, Cost and Risk
 - Utility and Warranty

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ITIL is evolving...

- From process focus to a more holistic view
- From fragmented lifecycle to end-to-end visibility
- From major releases to continual improvement
- From operational silos to flexible value flow

Since the latest update of ITIL in 2011 we have seen huge changes impacting many organizations who have adopted ITIL best practices.

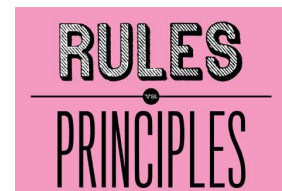
Therefore there has been a clear need to adapt to changes in markets, technologies and ways of working and ITIL is no exception and needs to evolve accordingly.



Principles as a central theme

There has been a clear trend among the commonly used frameworks, models and methodologies to move away from rules or controls and focus more on principles.

This development is in general positive as it can make interoperability and integration between frameworks and methodologies easier and more accepted, as many basic underpinning principles are shared between different frameworks and/or methodologies.

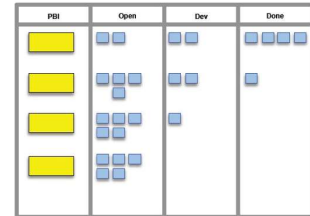


Product management

ITIL 4 Background

There is a trend among IT organizations to use a product management terminology and adopt ways of working from other domains like engineering or manufacturing.

Organizations own or have access to a variety of resources (and capabilities). Products are configurations of these resources that will potentially be valuable for its customers. The management of these products has for many become synonymous with service management.



This is not new as it was already partly introduced in previous versions of ITIL but makes ITIL 4 even more relevant and easier to relate to the emerging agile movement with its strong emphasis on development and management of products.

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Value - outcomes, costs and risks

Foundation recap

Definition: **Value**

Value is the perceived benefits, usefulness and importance of something.

Definition: **Outcome**

A result for a stakeholder enabled by one or more outputs.

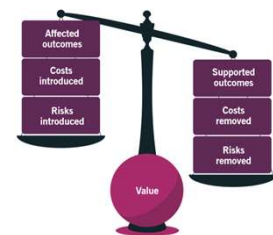
Definition: **Cost**

The amount of money spent on a specific activity or resource.

Cost can be expressed in non-monetary terms, such as time, people allocated, etc.

Definition: **Risk**

A possible event that could cause harm or loss or make it more difficult to achieve objectives. Can also be defined as “uncertainty of outcome”.



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Service management

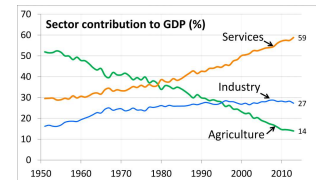
Foundation recap

Definition: Service

A means of enabling value co-creation by facilitating outcomes that customers want to achieve, without the customer having to manage specific costs and risks.

Definition: Product

A configuration of an organization's resources designed to offer value for a consumer.



Definition: Service management

A set of specialized organizational capabilities for enabling value for customers in the form of services.

Developing these capabilities requires an understanding of:

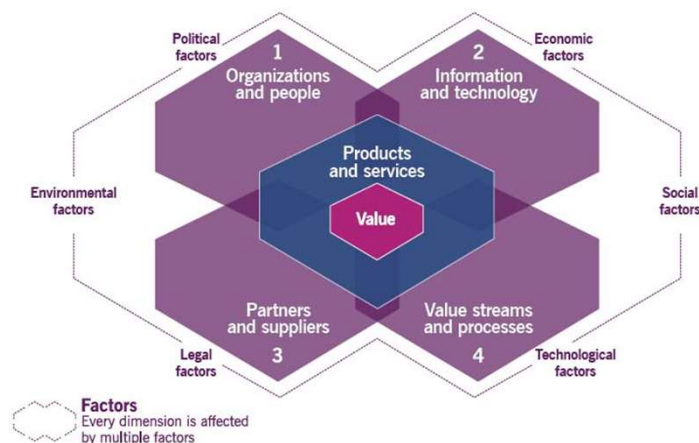
- the nature of value
- the nature and scope of the stakeholders involved
- how value creation is enabled through services.



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Four dimensions of service management

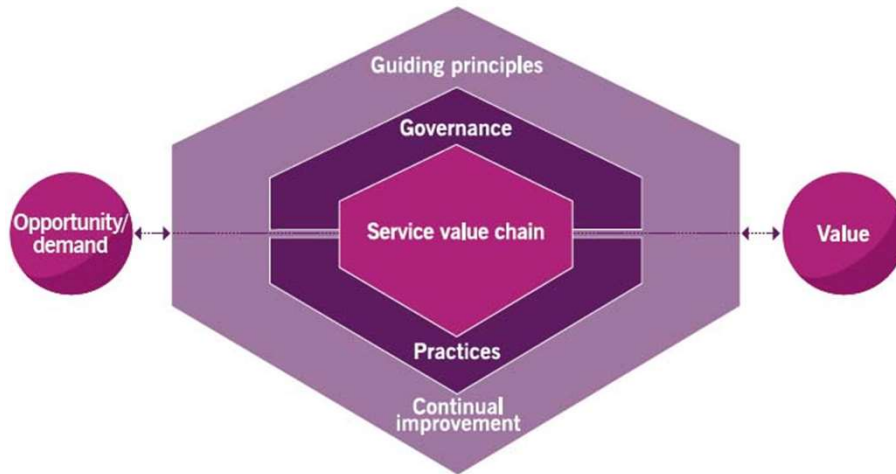
Foundation recap



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The service value system (SVS)

Foundation recap





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The 7 ITIL guiding principles


Foundation recap


- 
Focus on value


Everything that the organization does needs to map, directly or indirectly, to value for the stakeholders.
- 
Start where you are

Do not start from scratch and build something new without considering what is already available to be leveraged. The current state should be investigated and observed directly to make sure it is fully understood.
- 
Progress iteratively with feedback

Do not attempt to do everything at once. Even huge initiatives must be accomplished iteratively.
- 
Collaborate and promote visibility

Working together across boundaries produces results that have greater buy in, more relevance to objectives and better likelihood of long-term success. Achieving objectives requires information, understanding and trust.
- 
Think and work holistically

Results are delivered to internal and external customers through the effective and efficient management and dynamic integration of information, technology, organization, people, practices, partners and agreements, which should all be coordinated to provide a defined value.
- 
Keep it simple and practical

If a process, service, action or metric provides no value, or produces no useful outcome, eliminate it. Always use outcome-based thinking to produce practical solutions that deliver results.
- 
Optimize and automate

Eliminate anything that is truly wasteful and use technology to achieve whatever it is capable of. Human intervention should only happen where it really contributes value.

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Governance

Foundation recap

Governance is the means by which an organization is **directed and controlled**.

The role and position of governance in the ITIL Service Value System (SVS) will vary depending on how the SVS is applied in an organization.

The governance function of an organization has three main responsibilities:

- **Evaluate** – to identify the right options and objectives for the organization
- **Direct** – to point out the right direction and set overall objectives for the organization
- **Monitor** – to follow up on the management and realisation of agreed objectives

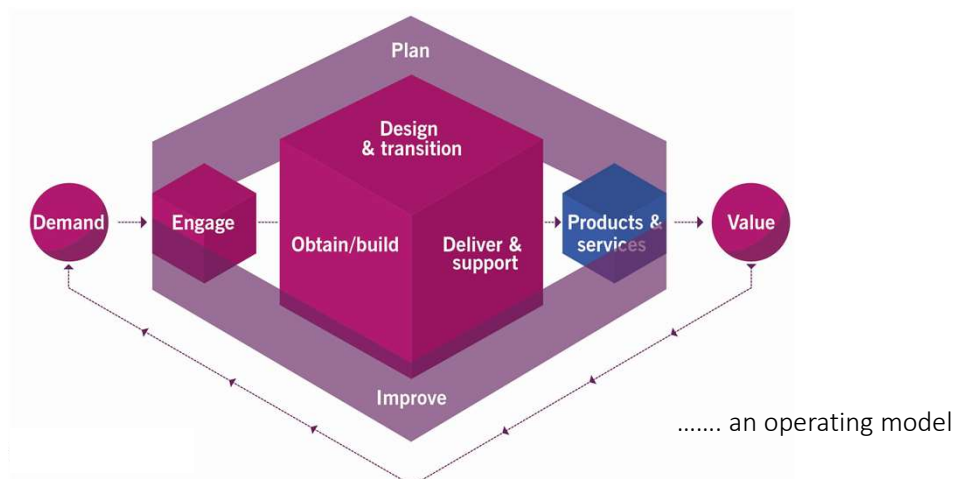
The acronym **EDM** is commonly used to refer to these three distinct responsibilities. It's important to understand the reason for the separation and the difference between the three.

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The ITIL service value chain

Foundation recap



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The 34 ITIL management practices

Foundation recap

General management practices

Architecture management
Continual improvement
Information security management Knowledge management
Measurement and reporting
 Organizational change management
 Portfolio management
 Project management
Relationship management
 Risk management
 Service financial management
 Strategy management
Supplier management
 Workforce and talent management

Service management practices

Availability management
 Business analysis
 Capacity and performance management
Change enablement
Incident management
IT asset management
Monitoring and event management
Problem management
Release management
 Service catalogue management
Service configuration management
 Service continuity management
 Service design
Service desk
Service level management
Service request management
 Service validation and testing

Technical management practices

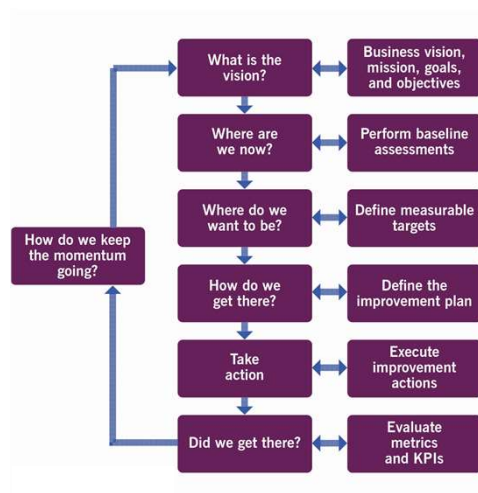
Deployment management
 Infrastructure and platform management
 Software development and management

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Continual improvement

Foundation recap

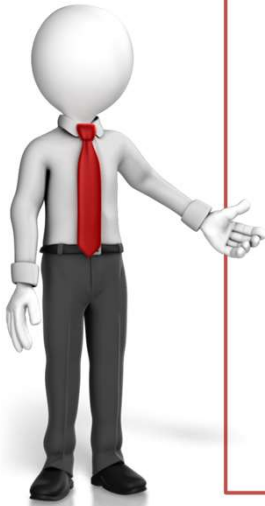


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Summary

Foundation recap



We have just talked about:

- ✓ This section has covered some fundamental concepts and key terms introduced in ITIL 4 Foundation
- ✓ Key areas discussed:
 - Service and service management
 - Value; outcomes, costs and risks
 - The ITIL Service Value System (SVS)
 - ITILs guiding principles
 - Governance
 - The ITIL service value chain
 - The ITIL management practices
 - Continual improvement
- ✓ The following sections build on the understanding these concepts and key terms and definitions

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Q: What are the two types of cost that a service consumer should evaluate?

- A. The cost of creating the service, and the cost charged for the service
- B. The costs removed by the service, and the costs imposed by the service
- C. The cost of provisioning the service, and the cost of improving the service
- D. The cost of purchasing software, and the cost of purchasing hardware

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Q: Which service management dimension is focused on activities and how these are coordinated?

- A. Organizations and people
- B. Information and technology
- C. Partners and suppliers
- D. Value streams and processes

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Q: Which ITIL concept describes governance?

- A. The seven guiding principles
- B. The four dimensions of service management
- C. The service value chain
- D. The service value system

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Q: What is the first step of the guiding principle 'focus on value'?

- A. Identify the outcomes that the service facilitates
- B. Identify all suppliers and partners that are involved in the service
- C. Determine who the service consumer is in each situation
- D. Determine the cost of provisioning the service

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Q: Which value chain activity includes negotiation of contracts and agreements with suppliers and partners?

- A. Engage
- B. Design and transition
- C. Obtain/build
- D. Deliver and support

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Q: How does categorization of incidents assist incident management?

- A. It helps direct the incident to the correct support area
- B. It determines the priority assigned to the incident
- C. It ensures that incidents are resolved in times agreed with the customer
- D. It determines how the service provider is perceived

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Q: Which is NOT usually included as part of 'incident management'?

- A. Scripts for collecting initial information about incidents
- B. Formalized processes for logging incidents
- C. Detailed procedures for the diagnosis of incidents
- D. Use of specialized knowledge for complicated incidents

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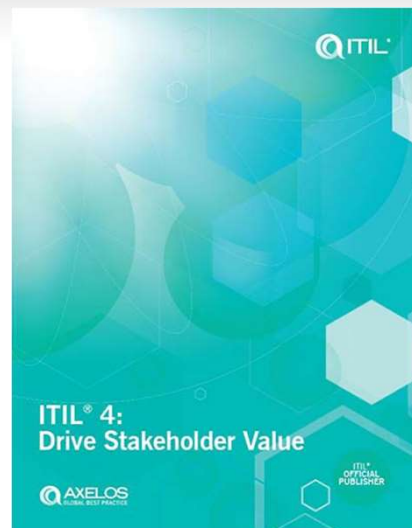
Course schedule

- Day 1:
- ✓ ITIL® 4 Foundation recap
 - The customer journey
 - Step 1: Explore
- Day 2:
- Step 2: Engage
 - Step 3: Offer
 - Step 4: Agree
- Day 3:
- Step 5: Onboard
 - Step 6: Co-create
 - Step 7: Realize
 - ITIL practices
 - Exam preparation

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THE CUSTOMER JOURNEY



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The customer journey

Engagement is crucial to optimizing service value. This is because service value is always **co-created** by users, customers, sponsors, service providers, and any other parties involved in the service.

To drive stakeholder value, all stakeholders must contribute to the co-creation of service value. This section will discuss the main steps of a **customer journey**, providing guidance on how to co-create the most valuable journey.

The customer journey can be broken down into seven steps:



Definition: **Customer journey**

The complete end-to-end experience that service customers have with one or more service providers and/or their products through touchpoints and service interactions.

Customer journey - Overview

Explore: Understand markets and stakeholders	The customer journey often begins before the service provider and service consumer have established a relationship. Both parties may explore their own needs and market opportunities for identifying partners that may contribute to the fulfilment of their respective needs. This exploration may include aspects such as operational context, strategic objectives, and organizational capabilities.
Engage: Foster relationships	An important precondition for co-creating value through services is a functioning relationship between the service provider, service consumer, and other stakeholders. Good relations are a prerequisite for a cooperative relationship or partnership.
Offer: Shape demand and service offerings	To determine whether the parties may benefit from a mutual service relationship, the service consumer and service provider should build a business case and articulate, shape, and match their demand and supply in the form of requirements and service offerings. Products and services can be designed only when the service consumer needs are well articulated and understood.
Agree: Align expectations and agree service	It is crucial to align expectations, plan value co-creation and tracking, and agree service scope and quality before investing.
Onboard: Get on board or leave the journey	Whether the parties came to an agreement or not, they must undergo a transition that involves the integration or separation of both parties' resources.
Co-create: Provide and consume	The service consumer makes use of accessible service provider resources, consumes the goods provided, and acts together with the service provider to co-create value based on the agreed service offerings.
Realize: Capture value and improve	Value must be tracked and driven based on the value co-creation planning, and improvements must be applied to continually maintain and increase the service value.

Table 1.1 The steps of the customer journey

Stakeholders

Drive Stakeholder Value
Customer journey

Service consumers and service providers are not the only people involved in the customer journey.

Services must create value for all relevant stakeholders. Therefore it is important that all key stakeholders are identified and that relationships with the stakeholders are understood and managed.

One way to understand how each stakeholder affects, or may be affected by, the journey is to map the stakeholders in a matrix, categorized according to their influence and involvement levels. The figure shows an example of stakeholder analysis and mapping.

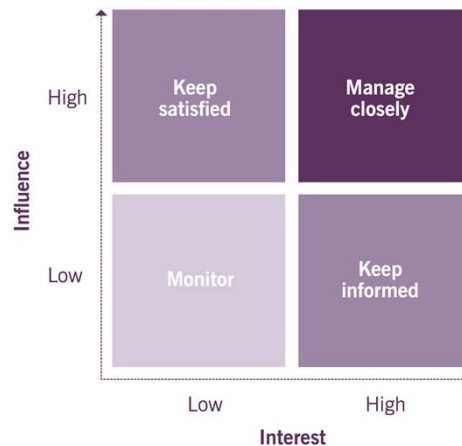


Figure 1.1 Sample stakeholder map

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Service consumers

Drive Stakeholder Value
Customer journey

In ITIL 4, the service consumer is an organization that consumes a service. In practice, there are at least three specific roles involved in the consumption of a service, which are shown in Figure 1.2 and include:

- the **customer** who defines the requirements for a service and takes responsibility for the outcomes of service consumption
- the **user** who uses the service
- the **sponsor** who authorizes the budget for service consumption.

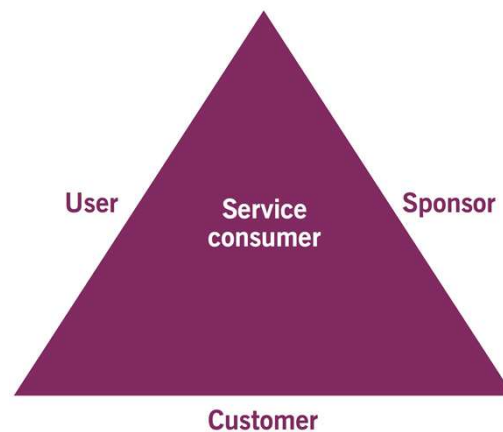


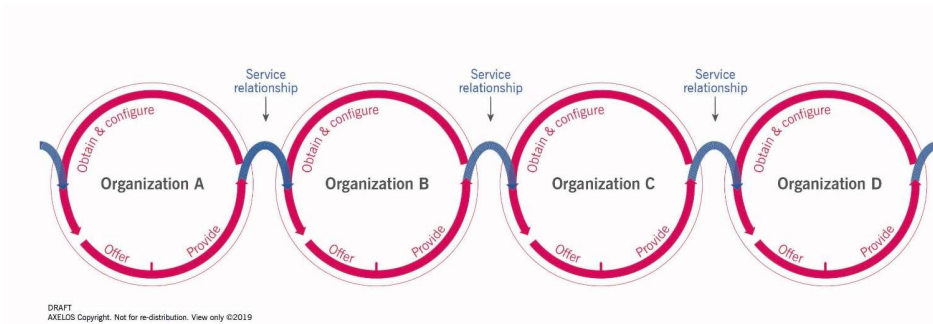
Figure 1.2 The three service consumer roles

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The service relationship model

Drive Stakeholder Value
Customer journey

In a service relationship, organizations will adopt the roles of service providers or service consumers. The two roles are not exclusive; organizations typically provide and consume a number of services at any given time.



DRAFT
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Figure 1.3 The service relationship model

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Three fundamental types of relationship

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Customer journey

Basic relationship



In a basic relationship, the customer may check the past performance of the service provider

Cooperative relationship



In a cooperative relationship, readiness to collaborate and communication mechanisms also become highly important when compared to basic relationships

Partnership



In a partnership, openness and trust are the key factors of mutual success. Readiness to collaborate becomes crucial

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Customer journeys

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The customer journey is the overall perception of the touchpoints and interactions between the service consumer and the service provider.

The relationship between value streams and customer journeys, as shown in Figure 1.4, can be characterized as follows:

- A customer journey always relies on at least one value stream from each of the involved parties.
- One value stream typically supports multiple customer journeys.
- One customer journey may span more than one service provider value stream or value streams from different service providers.
- The customer journey only includes value stream activities that are part of the band of visibility.

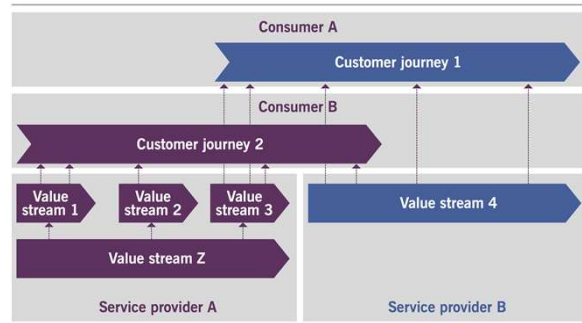


Figure 1.4 Relationships between value streams and customer journeys

Customer and user experience

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Customer journey

Customer and user journeys are important sources for customer and user experience (CX and UX). However, experiences are also influenced by factors in the environment, including the digital environment, and by the interactions and exposures that the consumer may have with the service provider’s brand.

This includes deliberate communications from the service provider and communications and interactions that the consumers will have with the brand as part of everyday life.

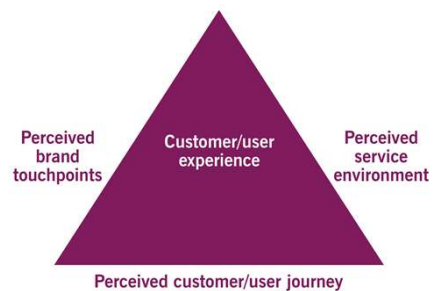


Figure 1.5 Three aspects of the customer and user experience

Definition: Customer experience	The sum of the functional and emotional interactions with a service and service provider as perceived by a service customer.
Definition: User experience	The sum of the functional and emotional interactions with a service and service provider as perceived by a user.