Managing in a
Service-Focused World

I, team, stewards and marketplace

Roger K. Williams

EXTRACT

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IT Governance Publishing

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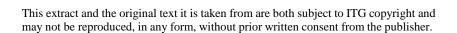
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ABOUT THE AUTHOR

Roger K. Williams has spent 20+ years in retail, 18+ years in IT, and over a dozen years in leadership roles at Fortune 50 companies. In addition to those experiences, he has also earned numerous certifications including ITIL Expert, PMP, COBIT 5 Foundations, HDI Support Center Manager, ISO20000 Foundations, and Toastmasters Advance Communicator Bronze. He has spoken at international conferences and panel sessions on ITSM and navigating the future of computing. His writings on managing attention and harnessing technology trends at the RogertheITSMGuy blog and on Google+ have garnered praise from a diverse audience. Roger resides in North Carolina.

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INTRODUCTION – MANAGEMENT AS A SERVICE

Management as a profession has never had an impressive reputation. Business thinkers deride management as a poor substitute for leadership. Startups describe management as a distraction from real work. Staff view management as bureaucracy. No one wants to be a manager when they grow up!

Management is not glamorous or glitzy. It is rarely dramatic or exciting, even when done well. Actions only yield results over time, and require patience. So why bother? It is the best tool for organizations to achieve their objectives. Good management provides value and is a competitive advantage. Management is a necessary, even **noble**, profession. It reduces waste and improves results. It also has a huge impact on the happiness (or lack thereof) of those who are managed.

Few people view IT service management (ITSM) as a useful resource for how to manage, despite the name. The word management appears over 7,000 times in ITIL® v3. However, it does not define the term on its own. Nor does it provide specific guidance about the topic.

ITSM thinking applies to management because it is a service. Like all other services, management is judged on how well it meets the needs of stakeholders. A manager's role has four primary stakeholder groups. This book's four parts each focus on one stakeholder group:

1. You (I)
2. Peers and direct reports (Team)
3. Supervisors and other leaders (Stewards)
4. Customers and other external parties (Marketplace)

Each part describes how to apply the thinking behind the service lifecycle and ITSM processes, as well as related knowledge from other fields, to management. Each chapter concludes with specific actions to improve skills and results.

While this book is suitable for anyone, new and aspiring managers will probably reap the most benefit. The transition from individual contributor to manager is the hardest transition to make in today's modern careers. It is overwhelming, and most management advice

is useless, at best. While ITSM has an 'ivory tower' reputation in some circles, the ideas in this book have been used, and refined, to help people like you deliver results.

As Eleanor Roosevelt said, 'Learn from the mistakes of others. You can't live long enough to make them all yourself.' Enough talk – time to get started!

PART I: PERSONAL EFFECTIVENESS

'Lack of direction, not lack of time, is the problem. We all have 24 hour days.' – Zig Ziglar

Focus matters. Modern technology is powerful. Distractions are plentiful. Applying the service lifecycle to ourselves enables us to deliver results that matter. It provides the foundation for today's successful manager.

CHAPTER 1: LEVERAGING STRATEGY GENERATION FOR A PERSONAL SUCCESS STRATEGY

'If you know the enemy and know yourself, you need not fear the result of a hundred battles. If you know yourself but not the enemy, for every victory gained you will also suffer a defeat. If you know neither the enemy nor yourself, you will succumb in every battle.' – Sun Tzu

Achievement does not normally happen by accident. It starts with a clear vision of what success looks like. Enterprises invest a lot of time, money, and energy into strategic planning to produce this vision. They value it, and you should too. A good personal strategy can give you clear direction and confidence. Without a personal strategy you will waste time and energy on things that do not matter. You will miss opportunities for meaningful growth. Your dreams may remain nothing more than dreams.

The idea of having to develop a strategy yourself may be scary. Maybe you've never even been in a strategy session. You don't have a team of MBAs. You won't be hosting an off-site meeting in Maui anytime soon. You don't even know where to start! Can ITSM really help?

Yes, it can! ITIL service strategy defines strategy as a plan intended to achieve defined objectives. It recommends a four-step lifecycle approach to develop, and maintain, a strategy known as the four Ps – see *figure 1.*

Figure 1: The four Ps of strategy

Let's see how we can apply this lifecycle to create a personal strategy.

Step 1: Determine Perspective

ITIL equates perspective with the vision, mission, and goals of an organization. You may hear people dismiss talk about a personal mission statement, personal brand, etc. as wasted effort. While there are some common pitfalls to avoid, don't neglect this step. It provides focus on the key things that will drive success, while minimizing and/or avoiding items that are not helpful.

Focusing on results is critical to success. Regardless of our intent, others reward or punish us based on our results. Just because a company intends to make a good product, this does not mean people will buy it! Likewise, we have all said things with good intent that we would love to take back. Good intention is not enough. We must also deliver.

There are two types of results of interest: milestones and outcomes. Milestones are oriented around the one-time results of an action, such as payments and products. Outcomes are the

changes over time related to our needs, such as improved health and better relationships. Outcomes are like milestones but are broader in scope.

The most common mistake is defining a vision focused on milestones (popularly known as a 'bucket list'). Suppose you define your vision as being a CIO of a Fortune 500 company, having a spouse and two kids, owning a nice house and retiring at age 50. While this is better than no vision at all, there are several drawbacks to a 'milestone' vision:

- It focuses on external decisions that may be out of your control.
- It excludes many other similar visions that may also be fulfilling, such as leading a non-profit company, working at a more enjoyable job until 60, or having more children.
- Even if you somehow achieve this vision, what do you do then?
- It is tempting to let the end justify the means.
- You will spend most (if not all) of your life falling short of this, so you may spend most of your life feeling like a failure.

Worst of all, you might achieve all your milestones and find they didn't really matter to you after all. How can you avoid these issues? One method is to use the '5 Whys' tool, typically used by problem management to understand your true desires. Let's apply it to our prospective CIO:

Why do you want to be a CIO?

- Get rich
- Have the respect of others
- Be able to perform big, ambitious projects that change the world
- Leave a legacy

We can ask 'why' about each of these, in turn, to refine the vision. Continue to ask 'why' for each statement until there are a set of 'outcome' vision statements. They differ from 'milestone' statements in the following ways:

- They are within your ability to influence.
- They can never be finished – no matter how much time you spend with your kids today, they will still want to spend time with you tomorrow.

- They can be achieved continuously – while you can't earn a college degree in a day, you can learn something new in a moment.

Your new perspective may look something like this:

- Improve my family's financial security
- Develop my relationships with my family and close friends
- Do meaningful work, in an ethical way, that helps others
- Support charitable causes that align with my values
- Continually learn and grow

This is a personal vision that is compelling and expansive. It reduces the chance of achieving milestones, at the expense of the outcomes truly desired.

Step 2: Form a Position

A position is the stance taken by an organization to achieve its perspective – its unique value proposition. This idea also applies to career choices. We do this without even realizing it. Newer supervisors emphasize their energy, willingness to work long hours, and cutting-edge ideas. Experienced managers market their work accomplishments, network of resources, and knowledge of industries and firms.

There are many potential pitfalls in forming a position:

- Narrowly defining capabilities – experiences in one industry, or situation, are more transferable than commonly recognized.
- Falsely representing abilities – not only is it wrong, it is far too easily identified in today's connected world.
- Ineffectively communicating value proposition – employers and clients are far too busy to read between the lines.

The worst error you can make is all too common. *Don't form a position that conflicts with your perspective.* Say you want to have a great relationship with your children. Offering to travel anywhere, anytime, at a moment's notice, would be a mistake. You would end up canceling planned events, missing important events, and undermining your relationship. This misalignment leads to a terrible outcome – accomplishments that do not provide meaningful value.

Regardless of the position you want to have, you must know your actual position too. Professionals often do not understand how they appear to others. Employers and clients can only give credit for what they can see, hear and experience. For example, you may apply for a position and have many relevant accomplishments, while a competitor has few. If you both only list your prior responsibilities on your resumes, how will the hiring manager distinguish between you in a resume screening? Hint: they won't!

Stakeholders can provide valuable input on each element of their personal vision and position. For example, criteria to evaluate in the professional space could include the following items:

- Reputation and brand in their network
- Value shown in resumes and cover letters
- Performance in interviews, presentations, and other persuasive situations
- Awareness and credibility by key industries and organizations
- Capabilities and skills in comparison to potential competitors

You will most likely find that the outside view differs from your desired internal view and your previously defined perspective. You may be discouraged. Don't be! You now have the key ingredients to create strategic plans.

Step 3: Craft and execute Plans

'Strategy, as a plan, is a course of action from one point to another within a competitive scenario.' ITIL v3 Service Strategy

Enterprises use strategic plans to improve their strategic positioning. For example, a firm that serves government agencies wants to increase market share. Its research determines an unmet need for a new product. The strategic plan oversees development of the new product. The firm's completion of the plan results in an improved position.

Your strategic plan has the same intent. Fortunately, you've already done the hard parts! Your perspective provides the criteria for success. Your position provides the current state for each criterion. The plan is simply a high-level approach to move from your current position, to a new position more in line with your perspective.

There are only a few steps required to develop your strategic plan:

1. For each item in the perspective, identify your new desired state. If you want to support charitable causes, you may set a target of at least two hours of volunteer work per month.

2. Create a list of ideas on how to achieve the combined set of items. Consider ways to achieve multiple items through a single action (e.g. volunteering at your child's school, or activity, can build relationships, contribute to the community, and develop new skills).

3. Select the best group of ideas aligned to the perspective.

Your result? A personal strategic plan focused on value, based in reality, and biased for action. Consider it your personal charter for success!

Step 4: Adopt Patterns of action

Strategic plans only create value when we put them into action. They create guardrails for design, enable focus during transition, provide guidance in operation, and form the basis for improvement. Processes, references, and decision criteria, are a few types of action patterns. The result is capabilities used to deliver services.

Each of these stages also provides input back into the strategy. Intentional actions always have unintended consequences. Employee actions to reduce returned product significantly affect brand reputation. A minor investment in online advertising becomes a big success. Hiring guidance attracts a culture of workaholics.

Unintended consequences also occur in your personal strategy. You must be flexible to exploit opportunities and minimize drawbacks. Yet actions also form patterns, such as credibility, integrity and reliability. If you deliver, on time, with high quality, you will earn a reputation for delivering value – and more opportunities to do so. Negative patterns reduce the odds of success. How, then, can you be nimble as things change? By using a simple approach to maintain an effective strategy:

1. Put your strategy into action.
2. Regularly review your results through observation and measurement.

3. Feed this information back into the start of your strategic lifecycle.

The lifecycle approach to strategy balances stability and agility. This balance provides the foundation for your personal success. A foundation by itself, though, is of little value. You must build on it! *Chapter 2* will outline how to apply good design principles to begin putting your strategy into action.

Action plan

- Identify your statements of success. Use the 5 Whys tool to turn milestone statements into outcome statements.
- Determine your current position. Ask peers, friends, family, etc. for candid input.
- Create a plan to improve your current state. Look for ideas that help you in more than one area.
- Execute, review results, and refine.

CHAPTER 2: USING DESIGN COORDINATION FOR YOUR PERSONAL SERVICES

'Systems thinking shows there is no outside; that you and the cause of your problems are part of a single system.'
– Peter Senge

Most people do not plan for success, and it shows. They focus on the unimportant. They spend on the unnecessary. They deliver on the useless.

ITIL defines a system as 'a series of related things that work together to achieve an objective.' Thus, we can call how you deliver results your 'personal effectiveness system' (PES). Your PES has a design, even if unplanned. The good news is that ITSM thinking can help you whip your PES into shape!

ITIL identifies five elements of a holistic design. They are the service solutions, service management systems and tools, architectures, measurements, and processes. Let's apply this framework to your PES.

Element 1: Design the service solutions you will deliver

A service solution is the mix of goods and services that meet a need. ITIL states that services are composed of resources and capabilities. This leads to our first rule: *don't define a service solution you can't deliver.* The best way to avoid this pitfall is to identify your capabilities and resources first.

Capabilities

- Management – There's that word again! In this context, management refers to the classic ability to 'do things right.'
  - ο Can you execute to a plan?
  - ο Can you get others to do so?
- Organization – This typically refers to hierarchies and reporting structures. Think of this as your ability to apply your resources to create value.
  - ο What assistance (real and virtual) can you call on to perform tasks?

- ο How 'in the loop' are you when others do things on your behalf?
- Processes – We will discuss processes later on in *Chapter 2*. For now, consider your ability to define how you work.
  - ο Can you describe what you do in a few key steps?
  - ο Do you know who your customers are, and how they define quality?
- Knowledge – We will discuss knowledge management in depth in *Chapter 3*. For this situation, focus on your current state of knowledge.
  - ο What models, frameworks, and approaches are you certified in, familiar with, and/or able to apply?
  - ο How well can you learn and grow?

Resources

- Financial capital – Money can cover up many gaps. Lack of money limits options.
  - ο How much money could you access to take advantage of a 'golden opportunity'?
  - ο What existing commitments restrict your freedom?
- Infrastructure – Our equipment affects how we work. Consider how laptops changed workplaces in the early 2000s.
  - ο How do your existing devices enable, or restrict, the kinds of tasks you can perform?
  - ο What limits do you face when you are away from your home and work spaces?
- Applications – Applications enable us to perform useful tasks. They greatly affect our efficiency and effectiveness.
  - ο What applications can you access?
  - ο How well can you use them to get work done?
- Information – Access to the right information is a critical success factor.
  - ο What information sources do you use?
  - ο How often does new information change how you approach your work?

Use the resources and capabilities you have to define the services you will offer. How to do this? Engage the most important resource and capability: you! Your work ethic, creativity, and insight are just a few of the attributes you bring to the table.

- Identify the unmet needs you see in everyday life, social media, and job postings.
- Review your resources and capabilities that could help meet those needs. Don't forget the services and systems that others provide you.
- Define your service solutions based on the need you will meet, and the resources and capabilities you will use.

Element 2: Design the service management systems and tools you will use to manage your services

A core principle of ITIL is to manage things that matter throughout their lifecycle. The services we defined in Part 1 are no different. The primary ITSM system and tool recommended by ITIL for this purpose is the service portfolio. While we will discuss service portfolio management in depth in *Chapter 11*, we must consider a few key items now for our PES.

- Create a list of your defined services and their attributes.
  - ο What do your customers get from the service?
  - ο What resources and capabilities are required to deliver the service?
- Identify the lifecycle stage for each service.
  - ο Which services are you delivering and actively provide value?
  - ο Which services are you building and testing?
  - ο Which services are still in the idea stage?

The service portfolio provides a single view into how you provide value. Here are just a few ways it can help you.

- Find opportunities for new services with your existing customers.
- Identify services that overlap or conflict.
- See what services warrant further investment – and those that should be retired.

Element 3: Design the architectures for your services

Many people in IT say they want to be in architecture. For many, it is because they view it as a high-paying job that can't be outsourced, that tells other people what to do. Sounds great, right? But ask those people what architects *actually do* and you

will rarely hear the same answer twice. Even authorities disagree on what architecture means in IT.

ITIL defines architecture as 'the structure of a system or IT service,' as well as the relationships, standards, and guidelines of the structure. Since your PES is a system, you are an architect! Just consider the subsystems that make up your PES:

- Communication systems
- Productivity systems
- Mobility systems
- Connectivity systems
- Computing systems
- Creativity and presentation systems
- Knowledge management systems (gathering, storage, retention, analysis)
- Transportation systems
- Personal well-being systems (health, finance, spiritual)
- Relationship management systems (family, service providers, regulatory)
- Acquisition systems
- Improvement systems
- Entertainment systems
- Specialized systems for your unique service offerings

That's quite a list! Notice a couple of things about this list.

- None of these systems is new, just the technologies. For example, computing systems include finger counting, abacuses, and long division.
- Multiple systems can use the same resources and capabilities. A horse can be a resource for both a transportation system and an entertainment system.

We have filled our world with poorly designed business and personal architectures. They have redundant tools that don't work well together. They are time-consuming to maintain and upgrade. To make things worse, they are resistant to change when something better comes along. When you spend more time updating your applications than you spend using them, poor architecture is why!

So how can you make your PES easier to maintain, and cheaper? Here is one approach based on good enterprise architecture practices:

- Identify the resources and capabilities you use for each system.
- For each item, determine what other systems it could also support. For instance, a magazine subscription could be a part of entertainment and personal health systems.
- Focus on your unitaskers – those items that only support one system. Does it provide unique value? Could another resource, or capability, do the job competently? If so, get rid of it!
- Look at systems where you have a lot of resources and capabilities. Are you using multiple tools to do the same thing? Could you get 95% of the value from just one or two items? Don't use 12 tools where three will do just as well!
- Review the resources and capabilities that support many systems. What can they do that you are not using? Is there a core set of items that would cover most, or all, of your needs?
- Maximize the value of your 'core architecture.' For example, there may be a way to integrate two systems so they work well together. This is a worthy investment for core items.

The ideal state is to use a few resources and capabilities to their limits, and supplement them where there are gaps or unique value. Even a five-ten percent reduction in money and time spent will pay off in the end!

Element 4: Design the measurements and metrics for your services

'Measure twice, cut once.' Anyone who has ever built a house knows the importance of measurement. The same is true of your life. Have you ever spent time on a task, only to realize at the end that you have no idea if what you did actually made things better? Poor metrics are usually to blame. This is a core focus of ITIL and this book. Measurement is the foundation of improvement.

At this point, it is essential to know what success looks like before taking action. There is a secret to doing this well. *Define your measures of success from your customer's perspective.* As ITIL repeatedly states, the customer ultimately determines value. They do not care how many hours you spent developing your service, or

how hard it was to deliver. Their concern is getting sufficient value from your service for the money, time, and energy they spend.

Another mistake is using only objective measures to determine value. Yes, you need objective measures. Don't forget, though, that value is a subjective experience. There is no substitute for asking your customers what value they received from your service. While there are many tools, such as SERVQUAL, that do this very well, you don't need anything complex to get started. Here is a simple approach based on a concept called Net Promoter Score:

- Ask the people who depend on your work if they would recommend your services to others. Include your peers, your boss, and anyone else that receives your work products.
- Classify each person, based on their feedback, into three buckets: those that would recommend your work to others, those who would discourage others from using your work, and those that do not feel strongly either way.
- Count the number of people that would recommend your work. Subtract the count of people who would discourage others. Divide this number by the total number of people you asked for feedback.
  - ο If this value is negative, fix the flaws that cause the negative view of your results.
  - ο If it's between 0% and 20%, it is likely you are not getting candid feedback. The cure for this is improving relationships, which is a major focus in Part II of this book.
  - ο If it is greater than 20%, ask your advocates why they would recommend your services. Strive to deliver that value to everyone you support.

The hardest part of measurement is getting started. Don't wait until you can produce 'true' metrics. That day will never come! Put something in place, even if it is flawed.

Element 5: Design the processes that support your services

ITIL has a lot to say about processes. It defines them as '*a structured set of activities designed to accomplish a specific objective.*' This is a turnoff to many folks. What comes to mind when you see the word 'process': long lines? Endless forms? Eternal waits? Smug paper-pushers? Scary!

So why don't we just avoid processes altogether? The fact is, we cannot. At the most basic level, a process describes how to change something into something else. For example, here is a process description of a meal:

- Obtain food
- Prepare food
- Serve food
- Eat food

It is impossible to have a meal without performing these steps. Does this mean your next lunch will require a ten-page form and an hour's wait? No! Those sorts of things depend on goals, resources, and capabilities outside the process.

We have established that we cannot avoid processes. How can we design them for effective use? You may have heard of Six Sigma. It is a set of tools and techniques for process improvement. SIPOC is a popular Six Sigma tool that guides process design by considering Suppliers, Inputs, Process, Outputs, and Customers. Here is a useful way to apply this tool to designing your services:

- Identify the customers of your service. Who will primarily use the outputs, or be affected by them? For our meal, this would be the diners eating the meal.
- Determine the outputs the customers primarily want from the service. Our diners may want a cheap and tasty meal. Perhaps they would prefer a healthful and filling meal. Maybe they desire a romantic and fun experience.
- Define the process to deliver the outputs. Our four-step process from above will work fine for now. Resist the urge to call out more than five steps at this time.
- Call out the inputs needed by the process to produce the desired outputs. Some of our meal inputs could include prepared foods, ingredients, cookware, dishes, and recipes.
- Select the suppliers that will provide the inputs. Our meal inputs could come from grocery stores, cookbooks, or the local pizza place.

Doing this work will help you focus on what matters. It can also identify areas where automation can help, or where it is more trouble than it is worth. One more benefit is that a documented process is easier to measure.

These five elements feed into each other. Your process designs, for instance, will help define your measurements. The important thing is to account for all of these areas. They will be refined as we progress through the lifecycle.

Now you have your value stream – a clearly defined set of services, and the elements needed to build them. In the next two chapters, we will use ITSM thinking to help you set up two critical systems – knowledge management systems (*Chapter 3*) and communication systems (*Chapter 4*).

Action plan

- Design your Personal Effectiveness System (PES)
    - o Define your services based on your resources and capabilities
    - o Document the key attributes of your services to create your service portfolio
    - o Review the tools in your PES and improve these using good architectural practices
    - o Write down your measures of success from your customer's point of view
    - o Use SIPOC to create your processes
- Review your PES against your statements of success from *Chapter 1*. Are they aligned? If not, document the gaps for improvement

<<< END OF EXTRACT >>>

Managing In a Service-Focused World

- Understand how to apply the principles of service management and boost your management skills.
- Learn how to keep your team positive and focused for improved productivity.
- Use an established framework to take control of your career and improve your professional standing with clients, customers and colleagues at all levels.

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