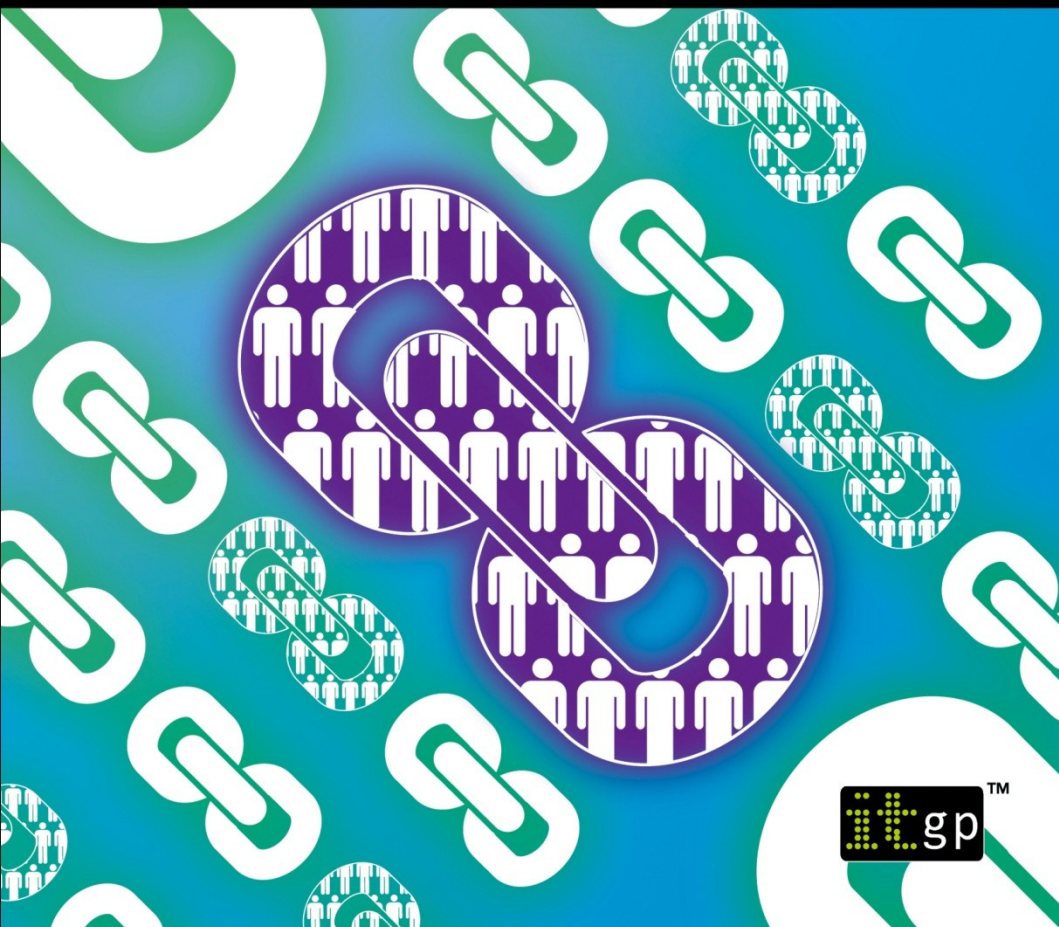# Catalogs, Services and Portfolios

An ITSM success story

Daniel McLean

itgp™

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DANIEL McLEAN

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PREFACE

People often struggle implementing, and operating ITSM processes based on various best practice standards. Rarely is this due to a failure to understand the standards, the tools, or the technology. Usually, it is a failure to appreciate, and deal with, issues surrounding changing people's behaviors.

Implementing process is all about changing behavior. The words in the phrase, *People – Process – Tools*, are in that order for a reason. If People don't embrace the activity, then the Process and Tools won't matter. Changing people's behavior is one of the hardest things we do in business, and something IT people find most difficult.

High-performing IT organizations have a secret to their success. They understand that IT success is more dependent on interpersonal dialogue and behaviors, than on the state of its technology. They have learned how to change behaviors as effectively as they change technology.

Although some best practices mention the importance of being able to change behaviors, they give little specific guidance on how to make it happen.

This is one in a series of books designed to help you do more than just survive these issues. These books will show you how others dealt with the same situations you face every day. Once they learned how to change people's behavior, the process and technology were easy. These books look at what worked, what failed, and traps to avoid.

Learn from their lessons and avoid their mistakes.

ABOUT THE AUTHOR

Mr McLean is a consultant who has designed, implemented and operated processes supporting ITSM for over 10 years. He has worked in IT for over 20 years. He was a peer reviewer during development of the OGC ITIL$^{®1}$ v3 Service Strategy standard. He has developed and delivered ITIL courseware customized to company-specific operational practices and needs. He has worked in the US and the Middle East.

Mr McLean is the author of *The ITSM Iron Triangle: Incidents, Changes and Problems*.

Mr McLean's consultancy focuses on fusing best practices from multiple ITSM relevant standards, into practical operational processes optimized for each organization's particular environment and needs. He provides this support at the design, implementation and daily operation levels.

Among other honors, Mr McLean holds an ITIL Manager's Certificate in IT Service Management, an ISO20000 Consultant Manager Certificate, and an ISO20000 Professional: Management and Improvement of ITSM Processes Certificate.

Mr McLean holds both Bachelor's and Master's degrees from Cornell University.

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ACKNOWLEDGEMENTS

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INTRODUCTION

More ITSM initiatives are derailed by the word 'service' than any other term you will find. Best practices often talk about service as something that adds value to the business by helping them achieve their goals. In other words, only the business can define what an IT service is. But in most companies, only IT is involved in defining services.

IT tends to look at services from the inside-out, providing offerings to the business in IT terms consistent with the way IT is organized. It maximizes the efficiency of IT and minimizes disruptions in IT.

The business needs services offered outside-in, packaged in terms relevant to their needs and organized in ways consistent with how the business operates.

High-performing IT organizations understand this. Their goal is to be effective in leveraging business operations, as well as efficient in running their operations. To do this, they must offer views of services that are relevant and understandable to their users, as well as useable within IT.

By itself, this is not an overly complex structure. However, establishing this ITSM process, and maintaining it, depends on something that is highly complex – people's behaviors.

Therein lays the challenge for us all.

CHAPTER 1: DON'T FALL UNDER THE BUS

Ramesh, my boss, seemed strangely nervous as we walked into Lee's office. And that had me worried.

This was the first time I had seen Ramesh anything less than confident in front of other leaders … at any level.

Lee was a fresh transfer from the field to corporate. That seemed like a bizarre career change, going from sales to IT at a senior management level. You would have thought he'd have figured out what he really wanted to do a long time ago. I didn't know what Lee's real title was yet, only that he was probably close to Ramesh in level.

Ramesh usually treated me like I was one bad decision away from being fired; so it seemed totally out of character that he was dragging me along to what he had confessed was his first meeting with Lee.

But perhaps my recent hard-won success in stabilizing the incident, change and problem processes as the IT service response manager, had changed Ramesh's opinion of me. Maybe this was the first step in his acceptance of me and the value I brought to the team.

Lee said nothing as we walked in, and didn't even rise to offer a handshake. He merely motioned wordlessly to three straight-backed chairs across the desk from him. One of them was already occupied. Lee sat regally on the other side of the desk, a large Cheshire Cat smile on his face.

Ramesh planted himself in the rightmost chair and settled in, before speaking directly to Lee.

1: Don't Fall Under the Bus

'Welcome to IT,' said Ramesh. 'Tell me about your work in the field.'

Lee didn't answer immediately. Instead, he paused and took a long, slow swallow from his coffee mug, then set it down precisely in the center of a marble coaster. A pot of freshly brewed coffee sat on the credenza behind Lee, but he made no effort to offer any to us. With both hands, Lee meticulously slid the cup and coaster to the right side of his large, polished, wooden desk. Printed on the side of the mug were the words, 'That Which Does Not Kill Us Makes Us Stronger.'

On paper, IT had a business casual dress code, but in practice, it was a lot looser. It probably had something to do with reinforcing what I'd come to believe was the company's cultural view of IT; that we were a group of geeky nerds, with zero social skills and poor personal hygiene, who were kept around because they were the only ones who understood how all those boxes of blinking lights worked. And if you were a high performer, anything that wouldn't get you arrested for indecent exposure, was tolerated and almost expected. It was along the lines of the stranger you looked, the more valuable you must be for leadership to tolerate you. I once saw one of our top security gurus show up to a meeting with no shoes, badly frayed and unevenly cut off homemade, blue jean shorts, and a permanently stained t-shirt that had the words, 'Question Authority' drawn across the front with a permanent marker.

Lee was different.

Lee was immaculately dressed in a suit and tie that probably cost more than I made in two weeks. With suit creases sharp as a knife, in a perfect balance of timeless but

slightly fashion forward style, he was ready for any occasion. His nails were freshly manicured and clear polished, and every strand of his carefully styled hair was perfectly in place. Lee seemed one of those people who always looked freshly pressed and groomed, even after they'd been flying in a cramped coach airline seat for the last 12 hours. However, I was beginning to suspect that Lee never, ever, flew anything less than first class.

From what I'd heard, he wrapped a positive spin around every comment, and offered a quick response to any question. He had that special chemistry that made you want to like him, and get his approval, even when you disagreed. And if you were to believe the rumors we'd been hearing, he always closed the deal.

Lee occupied a prestigious corner office, with two walls of glass, and an unobstructed view of green lawns and clusters of trees surrounding the property. No parking lot asphalt to interrupt his bucolic vistas. In the distance, the faint outlines of the tallest buildings in the city were visible through the haze. Plaques attesting to great accomplishments cluttered the walls of his office. They formed a tableau, marking his rapid ascension from bag-carrying sales representative to regional director. His rapid advancement, and exposure to many different aspects of the business, hinted that upper leadership was grooming him for a senior role at the company. Maybe that was why he had been pulled out of business operations, brought back to headquarters, and tasked with ensuring IT was doing everything it could to support the success of the field.

I recognized the other person in the seat beside me. His name was Crayton. He was an IT project manager who'd been around for many years. I'd heard he was barely two

years from retirement, and was mostly focused on hanging on long enough to get there. Crayton was the project manager for an initiative called 'Sunrise,' which was running in parallel to the project I'd been asked to manage, 'Rubber Boots.' He didn't work for Ramesh. He worked directly for the project management office (PMO). The PMO was where most of our project managers reported. My project was the exception. I couldn't figure out why Lee had invited him to an introductory meeting with Ramesh. It made no sense. Or had Ramesh invited him instead?

I wondered if Crayton had been drafted into owning 'Sunrise,' like I had been for the 'Rubber Boots' project. I still hadn't figured that out. Even though I had no experience, or training, as a project manager, Jason, the senior VP of sales, had insisted I be the project manager for 'Rubber Boots,' and had done so in front of his peers, and over the objections of our CIO, and my ultimate boss, Jessica. Stranger still at the time, when Jason gave me the task, I'd known him for less than 30 minutes. I must have made a real positive impression for him to trust me with the fate of such an important project as Rubber Boots. Even I had to agree with Ramesh. The risk of me failing with that project was very high.

I'd been around long enough to know that no matter what company you worked at, it was a waste of time trying to understand executive decisions. While sometimes it seemed they made decisions that were good for them and not the company, I had to assume it only looked that way because I didn't have the visibility the executives did. I always assumed good intent on the part of my leaders until proven otherwise. By virtue of their responsibilities, they always place the good of the company above all else. The fact that

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I couldn't always see the bigger picture, was why I'd probably never be an executive.

Although I'd never met Crayton before, he was a friend of another project manager I knew from the gym, Maria. She said that despite trying to put himself on 'in-house retirement' for the next two years, he'd always been a stand-up guy. From the reports I'd read, his project seemed to be in the same state as mine, on spec, on schedule, and with earned value right on target. But I still didn't understand why he was here … and by himself.

Lee looked up at Ramesh and paused; silently waiting until there were no sounds, except the hum of the air conditioning and Ramesh's nervous breathing.

'Do you know how much revenue I generated in the field last year'? asked Lee.

Ramesh shook his head, 'No idea.'

Lee wrote a number on a piece of paper, folded it over, and slid it across the desk to Ramesh.

Ramesh looked up at Lee with a slightly shocked look on his face.

'Go ahead,' said Lee with a swagger. 'You can share it.'

Ramesh passed the note to us. I was stunned. It was larger than the entire annual operating budget for IT. So in one sense, Lee had funded IT for the entire company … and more.

'My region was the most productive of any in the company,' said Lee. 'We supported the largest customer base, had the most renewals, the most new business, the most revenue, and the highest margins. That's why they call

us the 'Rainmakers.' We always made the impossible happen.'

Ramesh started to speak, 'That's very impressive. You must be …'

Lee cut him off, 'So, if my work was so critical to the success of this company, why do you think the executives of this company would take me away from generating the revenue that makes it possible for IT to buy its toys? Why would they bring me back to the home office, thereby putting the company's revenue stream at risk? Do you think the senior executives have lost their minds and want to commit corporate suicide'?

Ramesh just shook his head.

In IT we heard a lot of field people talk about the uselessness of what they saw as a bloated, overstaffed, underused, and generally incompetent, IT organization. They just didn't understand how important we were to their success. They didn't appreciate all the things they didn't see that still had to be done. All they looked at was what they could touch.

It wouldn't have been so bad if they at least showed some gratitude once in a while, but they were always so incredibly ungrateful for all the hard work we did. They never thanked us for all the afterhours work, and all the family time we gave up meeting their crazy deadlines. The only thing they ever did was complain, even if the tiniest thing was not perfect. Maybe the problem was that we were too good at what we did; everything was too seamless. Maybe we needed to fail more often and show them how they couldn't succeed without us. Maybe that would change things.

'Of course you don't know why senior leadership is doing this,' said Lee. 'That's why you are a mere manager. And why should leadership tell you? After all, you're sitting there and …,' Lee gestured at his office and the view from his window, 'And I am sitting here.' Lee rearranged his coffee cup slightly, so that the handle was now precisely parallel to the edge of the pristine blotter on his desk. 'Let me tell you why. They did it because they don't want 'good.' In fact, they don't even want 'great.' What the executives of this company want is a game changer, and I am just the leader to make that happen.'

Out of the corner of my eye, I caught Crayton staring intently at Lee and rapidly scribbling notes.

Ramesh leaned forward, towards Lee, and said, 'That sounds great. There's nothing that can't be improved.' Ramesh turned in his chair and gestured at a large collection of awards and trophies. 'And I am sure there is a lot you can teach us. I'm sure everyone in IT will support your efforts any way we can.'

'I'm glad to hear you say that, Ramesh, because your organization, the whole IT organization, is going to be involved in this.'

'Really? Can you share a little of what you need from us, so that your organization and mine can work well together'?

Lee shook his head, smiled, and leaned back in his leather chair. He interlaced his fingers and said, 'Sorry, even if you were here by yourself, I couldn't disclose all the details to you yet. Only senior leadership has been briefed on my plan at this point, and they support it enthusiastically. But don't worry. You and your staff will be briefed at the appropriate times, along with the rest of IT. Let's just say that there will

be a lot of changes. We're going to infuse IT with the dynamism found in field operations to make it a more productive and responsive organization. No more of this bohemian enclave for losers. We will become the company leaders and a role model for all to follow.'

Lee leaned forward and gestured for Ramesh to lean close across the desk. In a quiet voice, Lee asked, 'You have heard of the projects named Rubber Boots and Sunrise'?

Ramesh gave an exaggerated look around the room that almost made me laugh. It was as if he were looking to make sure there were no industrial spies hiding in the corners, ready to steal any information they could get.

If Lee caught Ramesh's cartoonish gesture, he didn't reveal it. He simply said, 'Although it is premature, I can tell you that the first step will be for me to take personal control of these new projects, and make adjustments to ensure the corporation gets value for its investment, and the field gets maximum utility from the results. And all of it delivered on time, with the content the business needs.'

Ramesh interrupted and gestured at me. 'But Jason specifically asked for Chris and Crayton to lead these projects. I know. He told me directly.'

That answered one of my questions. So Crayton had been drafted, just as I had. Perhaps I now had a compatriot to work with this time. Partners were funny things. Sometimes they could do some of the work, but all too often I found their work not up to my standards, and ended up doing their work, too. Then you were always faced with the moral choice of giving them credit for the accomplishment, because you were supposed to be working as partners, or cutting them off like they deserved.

Lee looked straight at Crayton and myself for a moment, freezing us with his Cheshire Cat smile, before turning back to Ramesh.

'I'm sure these two are both good workers, but obviously neither has experience meeting business critical deliverables under pressure, and definitely are without experience in working with the field or senior leadership. That's why Jason approved this transfer of responsibility. Feel free to confirm it with him at your next scheduled one-on-one with him.'

Lee paused for a few seconds, and then added, 'Oh, I forgot, you don't meet regularly with him. Well, I do, and you can trust me when I say, he approved it.'

Ramesh took a deep breath before saying, 'I'm meeting with Jessica later this week. I will wait and confirm with her …'

Lee cut him off. 'That will only be a waste of your, and her time. Trust me. This is for Crayton's and Chris' own good. Better to be apprentice to the master longer, than reach beyond one's grasp and fail.' Lee stood up and walked to the window, while slowly sipping his coffee. His back to the room, he said, 'Learn how to adapt, improvise, overcome. That's what winners do. Just look at me. Model your behavior after me.'

Lee turned around quickly, and gesturing to the door said, 'Chris … Crayton? Will you please give us some time? Ramesh and I have a few more items to discuss.'

Ramesh nodded. As I stood up, Crayton finished writing the last of his notes. Collecting his material, he stood up, and we both headed for the door.

Just as my hand touched the doorknob, Lee added, 'Guys … Please don't do anything related to the projects unless I personally review and approve it. Be prepared to give me a full debrief very soon. You will receive further direction on your duties and role here at that time. Thanks.'

I was out the door first, with Crayton right behind me. Just before Crayton pulled the door closed, I heard Lee say to Ramesh, 'Let me make this very clear. The bus is leaving for success town and you can be on the bus with me, or you can be under the bus with the rest of the losers. The choice is yours. But you have to decide, and decide now. Just understand what it means to be on the bus with the winners. You will need to …'

Crayton pulled the door closed and cut off the last of Lee's words. As Crayton's hand left the handle, he looked at me, shook his head, and said, 'I wish I had his energy. What a driver.'

I didn't know Crayton well enough to know if he were being sarcastic, or really felt that way, so I simply said. 'Let's go to the break room and get a cup of coffee.'

Crayton nodded, and added, 'I could do better with something stronger.'

The break room was empty, and the last person to take a cup of coffee had left the pot nearly dry. The remaining coffee had boiled down into a thick dark sludge that clung to the bottom of the glass pot. Crayton grabbed the carafe and began rinsing it out to make some fresh.

I sat down, and Crayton joined me as the fresh coffee dripped.