



ITIL 2011

Summary of Updates



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1 Introduction

As outlined in the Mandate for Change (September 2009) and the Scope and Development Plan (February 2010), the ITIL guidance has been updated in response to:

- Issues raised through the change control log
- Advice from the change advisory board
- Feedback from the training community.

The project mandate was to correct errors, remove inconsistencies and improve clarity and structure. The updated guidance also reflects the authoring team's responses to reviewer feedback received during the first and second public quality assurance reviews – with contributions from more than 100 reviewers.

Throughout the project, the authoring team have met regularly to discuss any issues as they occur. Adhering to a strict governance structure, any significant issues raised by the authoring team were escalated to the project board for assessment in their weekly meetings.

This document outlines global changes made across the suite and changes made specifically to the five core publications. It will provide you with a high-level overview of the updates that have occurred as part of the ITIL update project.

For a full list of all those that contributed to ITIL 2011 – including the authors, mentors and project board – please visit:

www.itil-officialsite.com/Publications/PublicationAcknowledgements.aspx

2 Global changes

The updated ITIL publications share a similar standard structure, to improve consistency and aid navigation. Some content has been reorganized to improve flow and readability, and ensure alignment across the suite – including clarification around interfaces, and inputs and outputs across the service lifecycle.

Terminology has been clarified and made consistent across the publications and the ITIL glossary.

Table 1 documents global updates made to all of the lifecycle publications.

Table 1 Summary of updates: global

| Area of update | Description |
|---|--|
| Chapter 1 | Chapter 1 (Introduction) contains generic content, which is the same across all five core publications. It provides an overview of the publication, the context of the publication in relation to the rest of the service lifecycle and best-practice guidance, and, lastly, a discussion about ITIL itself. |
| Chapter 2 | Chapter 2, which looks at service management as a practice, is the same in each of the five core publications. |
| Chapter 6 | Chapter 6 identifies the organizational roles and responsibilities that should be considered to manage each of the lifecycle stages (a stage per book) and the related practices. It includes generic roles, responsibilities and competencies that apply across the service lifecycle, and specific aspects for the processes described in each publication. |
| Lifecycle interfaces, and inputs and outputs across the service lifecycle | A new table in Chapter 3 of each publication lists the inputs and outputs of the lifecycle to which the publication refers. Likewise a new appendix – Examples of inputs and outputs across the service lifecycle – has been added to each publication. It contains a table which identifies some of the major inputs and outputs between each stage to help users understand how the different lifecycle stages interact. |
| Related guidance appendix | This new appendix – in each of the core publications – includes frameworks, best practices, standards, models and quality systems that complement and have synergy with the ITIL service lifecycle. |
| Roles | Roles have been made consistent across the publications, ensuring that activities apply only to one role. |

Table 1 continued

| Area of update | Description |
|-------------------------|--|
| Organization structures | It is now clear that organization structures given as examples are indicative rather than prescriptive. |
| Structure of processes | All processes have been given a common treatment, ensuring that each one has purpose and objectives; scope; value to business; policies, principles and basic concepts; process activities, methods and techniques; triggers, inputs, outputs and interfaces; information management; critical success factors and key performance indicators; and challenges and risks. |
| Product manager | All references to product manager have been replaced with service owner. |
| Capitalization | Excessive and inconsistent capitalization has been removed to aid readability. |

3 *ITIL Service Strategy*

The concepts within the publication have been clarified, without changing the overall message. The updated publication includes more practical guidance and more examples where relevant.

The newly defined process of strategy management for IT services is responsible for developing and maintaining business and IT strategies, and there are now separate descriptions of business strategy and IT strategy. Financial management has been expanded, and business relationship management and demand management are now covered as processes.

Table 2 Summary of updates: *ITIL Service Strategy*

| Area of update | Description |
|----------------------------|---|
| Service strategy processes | The processes have now been clearly named and defined: strategy management for IT services; service portfolio management; financial management for IT services; demand management; and business relationship management. Each process has been described using a standard template. |

| Area of update | Description |
|---|--|
| Business strategy and IT strategy | Business strategy and IT strategy are two different things, and <i>ITIL Service Strategy</i> now describes these separately and explains the relationship between the two: business strategy defines IT strategy, and IT strategy supports business strategy. |
| Strategy assessment, generation and execution | More detailed guidance has been included on how an organization should go about assessing, generating and executing its IT strategy, giving practical examples of how to proceed. |
| Value creation | Greater clarification is provided around how services add and realize value. New text has been included to describe how value is created, and how to differentiate between value added and value realized. A new table provides examples of utility and warranty. |
| Customers | It is now clearer how customers differ from users and consumers; how internal and external customers are differentiated; how business units and other IT departments as customers differ; and how IT performs its role as an external service provider. |
| Customer and service assets | Definitions of customer asset and service asset have been clarified, with an explanation around why these concepts are important and how they are used – including aligning service assets with customer outcomes. A new series of diagrams demonstrates the relationships between business outcomes, customer assets, service assets, constraints and service management. |
| Strategy management for IT services | The newly defined process of strategy management for IT services is responsible for developing and maintaining business and IT strategies. |

Table 2 continued

| Area of update | Description |
|--|---|
| Financial management for IT services | The financial management for IT services process has been expanded to include some of the key elements included in the earlier ITIL publications which had been excluded in the 2007 edition of <i>Service Strategy</i> – such as accounting, budgeting and charging. |
| Business relationship management | Business relationship management is now covered as a process as well as a role. The differentiation between business relationship management for a Type I, II and III service provider is better explained and clarified. |
| Governance | There is now more detail on governance, including a fuller definition of what governance means, the difference between governance and management, a governance framework, and how service management relates to governance. |
| Cloud computing | Some coverage has been added on how IT service management is impacted by the prevalence of cloud computing, and a new appendix has been added specifically covering service strategy and the cloud: characteristics, types, types of service, and components of cloud architecture. |
| Types of service management implementation | Coverage has been added regarding the types of service management implementation: even keel, trouble, growth and radical change. |
| Organization | Some discussion on functions has been added and a logical organization structure for service management has been included, with supporting diagrams. |

4 ITIL Service Design

Throughout the updated *ITIL Service Design* publication, there has been particular focus on alignment with *ITIL Service Strategy*.

A number of concepts and principles have been clarified, most significantly the flow and management of activity throughout the overall service design stage with the addition of the 'design

coordination' process. Other significant clarifications include the five aspects of service design, the design of the service portfolio, and the terminology related to views of the service catalogue.

Table 3 Summary of updates: *ITIL Service Design*

| Area of update | Description |
|---|---|
| Five aspects of service design | There is now consistency and clarity of references to the five aspects of service design. |
| Transition of a service from pipeline to catalogue to retired | The descriptions in the 2007 editions of <i>Service Strategy</i> and <i>Service Design</i> were unclear. In the 2011 edition, they have been updated to provide clarity on the definite transition points and the places for policy setting. A new status has been added to make policy setting easier. |
| Design coordination process | The design coordination process has been added to clarify the flow of activity in the service design lifecycle stage. |
| Service catalogue terminology | The service catalogue language has been revised with regard to the customer's view of the service catalogue, versus the technical or IT view. |

5 ITIL Service Transition

The structure, content and relationships of the configuration management system (CMS) and service knowledge management system (SKMS) have been clarified to help the reader to understand these key concepts.

There is new content explaining how a change proposal should be used. The evaluation process has been renamed 'change evaluation' and the purpose and scope have been modified to help clarify when and how this process should be used.

The service asset and configuration management process has additional content relating to asset management, and there are improvements in the flow and integration of a number of processes, including change management, release and deployment management, and change evaluation.

Table 4 Summary of changes: ITIL Service Transition

| Area of update | Description |
|--|--|
| Change management | Top-level flowchart and section headings have been modified so that they are consistent with each other. |
| Change process model | The name 'change model' is now used consistently. Previously the description used the term 'change process model' but many places in <i>Service Transition</i> and the other publications used 'change model'. |
| Change proposal | More detail has been added to help clarify how and when a change proposal should be used. |
| Configuration record, configuration item (CI), CMS, SKMS | Many people were confused by the descriptions of a configuration record, CI, CMS and SKMS in the 2007 edition of <i>Service Transition</i> and wanted a clear and unambiguous explanation of these concepts. |
| Evaluation | The process name has been changed to 'change evaluation' and the purpose and scope have been clarified to show that this process is used for evaluating changes only. |
| Release and deployment management | Some sections have been reordered and a high-level process diagram has been provided showing how it all fits together. |
| Service asset and configuration management | Text has been added to explain the service asset management aspects better. |

6 ITIL Service Operation

Process flows have been updated or added for all processes including request fulfilment, access management and event management.

Key principles – including guidance around service requests and request models, and proactive problem management – have been clarified. The publication has been updated to explain how basic events flow into filters and rule engines to produce meaningful event information. The relationship between application management activities versus application development activities is also clarified.

Other improvements include an expanded section on problem analysis techniques, a procedure flow for incident matching, and further guidance for escalating incidents to problem management. In addition, the guidance for managing physical facilities has been expanded.

Table 5 Summary of updates: ITIL Service Operation

| Area of update | Description |
|---------------------------------|---|
| Service request | The concept of a service request has been significantly enhanced to provide a clearer definition, with examples and diagrams to illustrate how service requests link with the services they support. The relationship of service requests to request models and standard changes is also highlighted. |
| Request model | This concept has been expanded to clarify how each service request should be linked to a request model that documents the steps and tasks, and the roles and responsibilities needed to fulfil requests. |
| Event filtering and correlation | Additional clarification has been provided to illustrate how basic events flow into filters and rule engines to produce meaningful information. |
| Normal service operation | A clearer definition for this has now been included and added to the glossary. |
| Incident matching | A procedure has been added to provide examples of how incidents should initially be matched against known error records before escalation. A detailed procedure flow for matching incidents and escalating to problem management has been added. |
| Request fulfilment process flow | A new process flow now illustrates a suggested set of activities and steps for the request fulfilment process. This process flow also includes decision points for escalating requests to service transition as change proposals or incident management as incidents. |

Table 5 continued

| Area of update | Description |
|---|---|
| Problem analysis techniques | This section has been expanded to include more techniques for finding root causes. In addition, each technique now indicates the kinds of situations and incidents where it may be advantageous to use the particular technique described. |
| Problem investigation and analysis | A concept has been added to recreate problems when they are being investigated. |
| Mainframe and server management | The concept that the activities and procedures for managing mainframes are no different from servers has been added. How these activities might be carried out may differ, but the outcomes and kinds of management task are essentially the same. |
| Proactive problem management | The concept and description of activities for proactive problem management have been added to the problem management process. |
| Application management versus application development | The differences between application management and application development are now clarified. A diagram has been added to show the key activities that take place during each stage of the application management lifecycle to demonstrate how application management differs from application development. |
| Facilities management | This appendix has been greatly enhanced with additional information for managing physical facilities. |

7 ITIL Continual Service Improvement

The seven-step improvement process and its relationship with the Plan-Do-Check-Act cycle (Deming Cycle) and knowledge management have been clarified. The continual service improvement (CSI) model has been re-named the CSI approach, and the concept of a CSI register has been introduced as a place to record details of all improvement initiatives within an organization.

Minor changes have been made throughout the publication to clarify the meaning and to improve readability. Particular emphasis has been placed on documenting the interfaces between CSI and other lifecycle stages.

Table 6 Summary of updates: ITIL Continual Service Improvement

| Area of update | Description |
|---|---|
| Introduction of the CSI register | The CSI register is where all improvement opportunities are recorded. Each opportunity should be categorized as a small, medium or large undertaking. An indication of the amount of time it would take to complete the initiative should also be provided, along with the associated benefits. Together, this information will help produce a clear prioritized list of improvement initiatives. A full description of the CSI register is given in Chapter 3, and an example is provided in Appendix C. |
| Service measurement and service reporting | The treatment of service measurement and service reporting has been clarified. Because all processes have an element of measurement and reporting embedded within them, service measurement and service reporting are not considered to be processes. Therefore, these topics are covered in Chapters 3 and 5, rather than Chapter 4. |
| Seven-step improvement process | It is now clear that the seven-step process only contains seven steps. Some step names and activities have been amended, but the overall purpose of the process remains unchanged. The interface with the Deming Cycle and with knowledge management has been clarified. |
| The CSI approach | The CSI model has been re-named the CSI approach, because it is an approach to continual improvement and not a model. |

8 ITIL glossary

The ITIL glossary has been aligned with the core publications, and reflects the updates made in those publications. There are around 55 new terms which have been added to the ITIL glossary, and approximately 30 terms have been deleted. Other terms have been updated – some more significantly than others – to reflect the content of the core publications.

The updated ITIL glossary can be found in English and other languages here:

<http://www.itil-officialsite.com/InternationalActivities/ITILGlossaries.aspx>

All translated glossaries are being updated in line with the English version, and will be added to this web page as soon as they become available.

9 Continual improvement

The update project has addressed key issues identified in the Scope and Development Plan and change control log.

In the spirit of best practice, and the need to strive for continual improvement, any issues that you would like to raise for any of these publications can be registered in the change control log at:

<http://www.best-management-practice.com/changeLog>

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