

Transitioning to ITIL V3

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While my friends, both young and old, are reading the just-released Harry Potter book, I have just finished reading another hefty and long-awaited British title – ITIL v.3 Service Transition.

In the new ITIL V3 Lifecycle approach, Service Transition sits between Service Design and Service Operation and guides the deployment of new or changed services into the infrastructure.

When you include Continual Service Improvement, which wraps around the whole Lifecycle, Service Transition becomes the “new normal” as it delivers new services to Service Operations while continually measuring and improving its own processes.

Service Transition aligns most closely with the ITIL V2 processes of Configuration, Change and Release Management. But as you read Service Transition, one of the first things you notice is that Service Asset and Configuration Management replaces Configuration Management, and Release and Deployment Management seems to replace Release Management!

These changes pale in comparison to the four new Service Transition processes: Transition Planning and Support, Service Validation and Testing, Evaluation, and Knowledge Management. It will be a while before these new and changed ITIL V3 process names roll off my tongue as glibly as those of ITIL V2.

However, it took just one pass through the Service Transition book for me to appreciate the contributions the restructured processes will make to IT Service Management in terms of structure, thoroughness and effectiveness.

Following, I compare and contrast these changes between ITIL V2 and V3. I present a brief look at each new process and describe what it does and what benefits it provides to Service Transition and business customers.

Transition Planning & Support

Transition Planning & Support plans and coordinates the resources to move a new or changed service into production within the predicted cost, quality and time estimates. This is not really a new process, as Release Management, and to some extent Change, previously incorporated portions of these planning activities in its scope.

What is new, however, is that the Transition Planning & Support process gives this process the high visibility it deserves by providing guidance for establishing release policies and transition strategies and for planning individual Service Transitions and support for those transitions.

Change Management

Change Management continues its previous mission of responding to the customer’s changing business requirements while maximizing value and reducing incidents, disruption and re-work.

Some of the prime changes in this section are really long-overdue clarifications of the previous process. For example, ITIL v.3 recognizes that an organization, especially a large organization, may utilize a number of Change Advisory Boards (CAB) to support different levels of change. It also begrudgingly notes that many organizations now conduct CAB meetings electronically instead of face-to-face.

ITIL v.2 fans will note that the term Remediation Plan replaces the previous Back-Out Plan, but the concept of addressing a failing change or release prior to its implementation remains.

Service Asset and Configuration Management (SACM)

One of the obvious differences between this process and the previous Configuration Management process is the apparent demotion of the Configuration Management Database (CMDB).

However, do not worry. The CMDB is still there. This revised process recognizes that any Configuration Management System (CMS) will contain multiple CMDBs. ITIL v.2 had, in effect, created a “wanabee” process, a conundrum that purported to be a best practice but outlined a practice that did not exist.

SACM now assumes responsibility for maintaining all secure libraries and stores, such as the Definitive Software Library (DSL) and Definitive Hardware Store (DHS) that Release Management previously maintained.

However, there is no longer a DSL nor a DHS. In a nod to current technology, the Definitive Media Library (DML) becomes the secure library that stores and protects definitive authorized versions of all media Configuration Items (CIs). The DHS passes into well-deserved oblivion, to be replaced only by a simple area that securely stores definitive hardware spares.

Release and Deployment Management

Release and Deployment Management now focuses exclusively on the activities of managing releases and deployments into the live infrastructure. With the overall policy-setting activities moved to the Transition and Support process, this process pulls the rich but somewhat fractured advice from ITIL v.2 into a comprehensive primer on building and managing releases.

It also introduces the concept of Early Life Support (ELS), which provides a little extra handholding support following the release of a change until the users and support teams can stand on their own.

If you are short on time, read this section first for its excellent guidance.

Service Validation & Testing

Service Validation & Testing is quality assurance, referred to in V.2, but never really addressed. Testing and validating remain the responsibilities of discrete groups and functions, and this process defines this progression of testing in terms of its incremental contribution to business value.

It further tightens up the use of the term Business Value with the concrete underpinnings of Utility and Warranty. In short, Utility evaluates whether a change is ‘fit for purpose,’ and Warranty evaluates whether it is ‘fit for use.’ I believe you will see more of these terms and concepts throughout the new ITIL.

Evaluation

Evaluation, as you may recall, was one of the ‘black holes’ that ITIL v.2 Change Management somewhat vaguely addressed. It went something like this, “The CAB evaluates the impact of the Request for Change (RFC) and makes a recommendation of whether to act upon it.”

ITIL v.3 is much more specific. It discusses how to actually plan, guide and execute the evaluation process, including recognizing the factors an evaluation should consider – service provider capability, tolerance, organizational setting, resources, modeling & measurement, people, use, and purpose.

It follows the Evaluation process from its initiation when an RFC enters the Change Management Process through its final report upon completion of the change.

Knowledge Management

Knowledge Management is a new, but highly effective, process in the ITIL world. For several years, itSM Solutions' non-ITIL courseware has expanded the traditional People-Process & Tools (PPT) triad to include Organization (PPTO), which provides the structure and cultural norms that enable PPT to achieve its goals.

ITIL v3 Service Transition equates Knowledge Management with an organization's ability to respond to circumstances. Although it is part of the Service Transition book, the other portions of the ITIL Lifecycle each use it to some extent.

Rather than focusing solely on communication, all too often characterized as one-way delivery of printed or electronic media, Knowledge Management addresses planning the Knowledge Management strategy, transferring knowledge, managing data and information, and using Knowledge Management in a Service environment.

Concluding Thoughts

There are some significant changes in ITIL v.3 Service Transition from the old Configuration, Change and Release Management. However, you need not throw anything away from the old ITIL. It is simply a matter of repositioning some activities, expanding on several rather vague and mushy activities, and adding a few new and highly relevant processes.

Sure, if you have always done everything 'by the book,' you will have to recalibrate your photographic memory. But, speaking for the rest of us, I find the restructured processes provide a good overview of the activities involved in Service Transition, and I welcome the detail guidance on the execution of these activities.

Maybe it is not as exciting summer reading as Harry Potter, but Service Transition ITIL v.3 certainly signals an important stage in the evolution of ITIL.

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