

CSI - Tips, Tricks, and Worst Practices to Learn From

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So you're going to improve your IT services? Go ahead; pick anything - as long as it is small, manageable, has to do with the Service Desk, does not have to do with a CMDB, does not need a \$500,000 tool investment in the first year, and does not need any resources that span across our customer service, infrastructure or application silos?!

No matter whether you call it Continual Service Improvement (CSI), Service Improvement Plans (SIP), or Continual Service Improvement Program (CSIP), many organizations start their CSI implementation in this manner. While that might be one way to get started with a CSI project, it does not exactly lead with the feel of 'improving IT operations in support of increasing the value of IT to the business.'

Starting off with the right structure for success and learning from those that have gone before you are keys to doing it the right way and truly ending up with operational improvements that add 'business value.' This article presents 5 key tips and/or pitfalls to consider prior to embarking upon the 'How' of ITIL by utilizing a Continual Service Improvement approach.

1. Training is not synonymous with Continuous Improvement

Training in ITIL or Service Management practices and methods is simply the starting point. Students sit through various forms of training on these practices and then in many cases are expected to organically understand how to use them and go out and make changes and immediately improve operations.

So how do we bridge this common misconception? A very effective way is by using simulation in conjunction with training. These are more than just 'fun' or 'hands-on' experiences for the students. Simulations really cement the practical part of the learning so that when students walk away from a day of 'doing it,' they now have experienced the importance of:

- working together across traditional functional silos
- clear paths of communication
- defining and understanding roles and responsibilities across silos
- understanding the importance of every level of the organization, especially the 'face of IT' – the Service Desk
- having a common mission and vision communicated and led across all levels of the organization

In addition to experiencing the importance of the lifecycle practices in action, simulations can provide a dynamic kick start to improvement efforts. The simulation exercise can get staff actively thinking about what it means to improve and even begin to translate this directly to their environments.

2. We must be improving or solving real 'problems'

We now have close to triple the number of functions and processes from which to choose from in the V3 ITSM lifecycle and for most, if not all, of our organizations, it is not about finding one place to start, but rather figuring out which of the 100 potential process activities or roles or tools or artifacts make the most sense to start with.

Paralysis sets in and we are right where we began, stuck asking "now where do we start?" and "how do we get going?"

At the start of every improvement engagement, we should be sitting down with the improvement stakeholders to do

nothing but identify the high-level business and IT goal(s) that will govern the engagement. Sometimes there are very specific goals for the improvements that we can all agree on. In many cases, we have a simple “we need to get better” expectation.

This is a start, but not good enough. We need to finish the “we need to get better” statement. We need to explore with our business and across our own operations what specific goals and key initiatives need to be enabled or better supported, or what perception of IT needs to be fixed, over the next 12 – 18 months. Otherwise, we risk improving for the sake of improving and wasting our time and efforts.

3. We must understand the dependencies of our improvements

It is critical to the success of our improvements to evaluate and assess the risks and dependencies across the committed efforts. We need to make sure we are not missing a foundational variable, challenge or relationship to any of these improvements that will cause us to fail!

As an example, one government agency built four great Service Desk-focused improvements, clearly owned and bought off on by their staff, and endorsed by leadership. When evaluating the criteria for success and potential risks facing these chartered improvements, each and every one came back with a dependency that spoke to needing both users and customers to be aware, involved, and also ready to change, or else these improvements would fail.

As a remedy, the agency added a fifth project that included an awareness road show by IT leadership to present the four improvements, where they came from, why they were important, what each user’s or customer’s role will be, and what was in it for them. The Service Desk project was not the value-grabbing silver bullet – it was the improvement awareness project that needed to go first before the other four had any chance to succeed and add value.

4. We must have leadership and commitment to these improvements

How do we learn from others’ mistakes? By not repeating them!

A typical common thread to many failures includes the scenario where the consultants come in, give their analysis and recommendations and then walk away, expecting those holding the ‘report’ to take ownership of their work and run with it. Not only does this approach not work for traditional technology-based improvements, it is a complete waste of time and effort when it comes to IT Service Management.

When we are talking about ITSM improvements, it is regarding how WE do OUR work! Thus, when approaching an ITSM Continual Service Improvement assessment or roadmap development, an approach that incorporates the following key points will help to foster the necessary accountability, ownership, and authority required to ensure that we get value out of our efforts.

- Staff the assessment with those individuals who will own and be responsible for executing the resulting improvements;
- Utilize consultants to guide and facilitate the discovery, assessment, analysis and improvement roadmap development;
- Ensure that the leadership (CIOs, directors, managers, leads) are actively involved in the efforts so that clear authorization and buy-in exists when it comes time to commit the resources and budget needed to execute on these improvements;
- Avoid private closed-door interviews and instead utilize workshops to facilitate the discovery, validation, building and scoping of the improvement efforts.

5. We must be realistic on the timing and scoping of our improvements

Unfortunately, our day jobs do not end or go on sabbatical when we begin these improvement efforts. We also cannot simply outsource these efforts to outside third parties that have no knowledge, understanding, or history with the operations needing improvement.

Thus, we must apply a final filter to our rose-colored improvement glasses and ensure that the resulting improvements we

commit to are individually assessed for size, scope, scale, risks and required resources (people and financial). Even though the identified and committed to efforts can and will add value, we must make sure that we can realistically get them done.

Otherwise, without realistic resource expectations, improvement efforts will fail before they even start, and not because they were the 'wrong' thing to do – we just did not have the people to do them.

Summary

Hopefully, with the use and awareness of these tips, tricks, and lessons learned as the foundation, organizations committed to Continual Service Improvement will be more successful in creating staff-owned and supported improvements that add ongoing value to the business they are supporting. We should be able to effectively turn our learning into understanding and then be poised to apply these practices directly to our environment.

Without this, the fear is that Continual Improvement ends up being another, in a long line, of really nice training or improvement or consultant-led exercises that were interesting to be a part of, but never helped anyone to actually get better!

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