

The Role of a Coach in Implementing IT Service Management

By [Larry Cooper](#)



"The goal of coaching is the goal of good management: to make the most of an organization's valuable resources."

- Harvard Business Review

In the world of sports the role and value of a good coach is well understood and accepted. Even at the grade school level we understood why we needed a hockey coach (can't you tell I'm Canadian?) or a football coach. It would be unheard of for a top-flight athlete to reach the heights of their success without a good coach.

Coaches have the advantage of being detached from the individual performance and taking an objective look at the finer points of a person's performance and accessing it against criteria they have for the individual as well as what they know it would take to be the very best. They can teach about aspects of performance that the athlete does not know, and may assist with mental attitude and approach.

When we get into the everyday workforce, we quickly forget what a good coach or mentor can do for us. We complain that our favorite sports team would do so much better if they only had the right coach. Yet, we fail to connect what a good coach or mentor could do for us individually or for our organization when we are doing something new, or we are about to do something that we have not done quite the same way as the new approach would suggest.

Couple the above with the fact that for many, trying to implement IT Service Management is like having to finally learn the actual rules of play to a game you played all your life – albeit somewhat incorrectly. You will find it very hard at times to forget the old ways of doing things.

When I tried to learn the breast-stroke in a swim class at the age of 30 I realized just how wrongly I had been doing it before – I never did get the leg movements right. If I had been taught how to do it correctly before I learned how to do it incorrectly, I probably would have been able to get it right, but my physical movements had already been conditioned into me. Fortunately, our grey matter is far more forgiving in undoing bad habits than our physical self might be.

In this DITY we would look at the three choices an organization wishing to implement IT Service Management (ITSM) can make:

- You can "have IT done to you" – Bring in an experienced ITSM organization to take responsibility for the delivery of the project;
- You can "Do-IT-Yourself" – You do not need any outside help (or need only a minimal amount) as you can determine how to do ITSM for yourself;
- You can "Do-IT-Yourself, with expert coaching and guidance" – selective use of expert assistance to help determine the best way forward for your particular organization.

One could argue that each of these approaches is a reflection of the maturity level of the organization and its understanding of the relationship of the ITSM processes to the organization – approach 1 representing the least mature organization (assuming they do not have any previous experience with ITSM) through to approach 3 where it is understood that the organization does not have sufficient internal expertise or capability, and requires assistance to move to the next level of maturity.

We will now take each of these approaches and discuss why an organization may adopt an approach, with the respective advantages and disadvantages of each.

"Have IT Done to You"

Why would an organization want to have another organization come in and take all, or most, of the roles in an ITSM project and be responsible for the outcomes? Here are a few of the reasons – no doubt, there are more:

- They have no idea what to do or how to approach an ITSM project. They do, however, understand they have some serious operational issues in running their IT shop, such as not meeting service level agreements or high levels of failed changes.
- This approach is perceived as a low risk option: "Let's get experts in to do this."
- The organization has a culture or expertise in outsourcing, and this is seen as "just another" outsourcing deal.
- The demand for ITSM originated with the business, but IT is not convinced and hence they can blame it on the "experts" if it does not work.

Advantages

- Faster implementation – If the ITSM implementation experts are running with the project, the likelihood is that the project will be implemented faster than otherwise might be the case.
- If the external parties are directed correctly by the engaging parties, they will be very focused on the delivery of the project benefits.

Disadvantages

- The organization could behave as if it had totally "outsourced" the project and does not need to take any responsibility for the delivery of the project, or does not need to take part in the project at all. When you hand over the keys and absolve yourself from taking part in the success of a project – even an outsourced one – chances are it will fail to meet its objectives. This is especially so with an IT Service Management implementation that requires IT to compare itself and its processes against ITIL best practices.
You cannot implement ITSM without both IT and the business engaged in the project. IT and the business must be involved in IT Service Management process improvement, as ITSM is all about the management of IT processes. In fact, IT must be intimately involved in all aspects of the project. There are decisions to be made that only IT can make; and when the project is complete, IT will be responsible for running the new or redesigned processes, not to mention their on-going improvement.
- The experts may have knowledge in ITSM and the implementation of ITSM projects, but they are not the experts in your business and how IT supports it. How will the new or redesigned processes align with the organization's strategy? How do you know that the staff will accept the new processes if they are not engaged in their creation? Who will align the new processes with the process and staff performance targets?
- The initial concept and assumptions behind a project needs to be re-visited during project execution. Absolution of responsibility will likely lead to missed opportunities for mid-course project corrections and hence project failure.
- This approach will also mean that it is unlikely that there will have been much transfer of intellectual property (ITSM knowledge) to the organization. As the business changes and the processes need enhancement, the external "experts" would need to be re-engaged to repeat the project.
- It can be very costly as the ITSM consultants will need to keep coming back for each additional phase of a Continuous Service Improvement Program (CSIP).
- Ownership of the resulting processes is never transferred to their proper owners or the proper owners never accept them because they were not a part of their creation.

Conclusion

This approach is not recommended as the involvement of both and the business is an essential ingredient in the success of any ITSM project. The experts may solve the wrong problem and not address all the issues associated with the original operational challenges or the reason for initiating the project in the first place. And just like the world in sports, someone else cannot skate for you, or kick the ball for you, or do anything for you that eventually you will have to do on your own anyway.

"Do IT Yourself"

Why would an organization adopt this approach? The plethora of reasons one can give is often superseded only by the paucity of expertise that exists within the organization to deliver. The reasons could include the following:

- We are unique. There is no other organization like us and, therefore, bringing in an external organization to assist would not help because "they just would not understand our particular situation, environment, or culture." This one is my personal favorite and I have heard it used for everything from why a business unit wanted to run its own e-learning system separate from the rest of their own organization to why another IT organization felt the urge to build its own network management software.
- We have a lot of bright people working in the organization; they are smart enough to figure this out for themselves. They can learn on the job, as they go.
- We just don't need consultants: all of our key project people have ITIL Foundation certification.
- Some organizations have a "not invented here" perspective. They do not respect or value external knowledge, only the knowledge it has created or gained itself. This is usually a cultural issue promulgated by the egos of key members of the staff or management.
- We can save a lot of money by implementing ITSM ourselves.

Advantages

- A sense of satisfaction that, once achieved, the organization has done it by itself. When they are in fact successful this is a very powerful pay off. The problem is that few organizations can succeed at ITSM on their own.
- The lessons learned will be hard won and therefore memorable. This will mean that the lessons will be remembered by the individuals and, hopefully, by the organization as a whole.
- The intellectual property gained will be retained within the organization, for the reasons mentioned above.
- The solution will be specifically tailored to meet the specific organizational requirements. This is an especially powerful motivator as a good ITSM implementation must reflect the realities of the organization – which all too often is forgotten.

Disadvantages

- Doing the stretch drive yourself within an organization will mean that mistakes and dead ends will be encountered. While these may result in memorable learning, they are also costly to an organization in terms of time and effort (and therefore money). Things will simply take longer. Then again, I once was a project management coach for a team that simply failed to learn, not only from the lessons of others I tried to help them avoid, but from their own by continually ignoring advice and then conducting lessons learned sessions to "discover" what they had already been told would happen if they did things a certain way! "Lessons learned" can easily become "lessons lost".
- The risk of project/program failure will increase exponentially because of the inexperience of the project team members in these types of projects. One of the key aspects to project management is the management and minimization of project risk through a sound setting of scope, understanding of the requirements, and good estimating based on past experience. "Doing it to yourself" in absence of any of these will not help minimize this risk.
- The above points will most likely lead to a delay in the realization of the benefits associated with a project. This will have both monetary and business agility impacts that may be unacceptable to the business – if they only knew about it.
- The increased risk will potentially lead to project failures. The challenge with this is that the failure may be perceived as a failure of ITSM itself to deliver the benefits promised, thus leading to the cancellation of an entire ITSM program.
- A full CSIP is likely never to be done as it is easy to lose momentum in the face of even the slightest perception of failure of the implementation on the part of the IT executive or the business.

Conclusion

This approach can create a sense of false economy unless the organization is ITSM experienced with multiple similar projects completed successfully. The inevitable delays in time and benefits realization, mistakes and higher risk factors will be expensive to the organization and place the project at a higher risk status. Some organizations try to overcome these issues by employing one or more contractors who claim to be ITSM experts or have ITSM experience. It is not "only some ITSM knowledge" that is required. There is also a need for a structured approach, together with deep and experienced ITSM implementation knowledge and ITSM coaching skills.

"Do IT Yourself, with Expert Coaching and Guidance"

The organizations that adopt this controlled approach are usually more mature in their culture, leadership, and ITSM or process driven knowledge. They understand that:

- Selective use of ITSM experts to assist the organization can significantly help in the successful implementation of ITSM. The organization understands that it "doesn't know what it doesn't know," and realizes that experts can assist them.
- Risk minimization strategies are critical to any IT or business program of work to enhance the prospect of success and avoiding failure. Use of expert coaches is a great way to minimize risk due to a lack of prior experience with all aspects of ITSM.
- They care for their staff and recognize where and when they will need assistance and support to help make the project successful.
- They respect their staff enough to support them in areas they are not strong in or do not understand well. They do not see this as a weakness in their staff, just that they require some training or coaching to overcome the lack of experience and to provide increased skills and knowledge.

Advantages

- The potential exists to implement ITSM faster than through other approaches.
- Risk is minimized in comparison to other approaches.
- The likelihood that business benefits will be realized faster. These benefits are not the only reasons for the project (examples are serious operational issues in running their IT shop, such as not meeting service level agreements or high levels of failed changes); benefits will also increase the agility of IT such as its ability to be more responsive to the business and its ability to recognize and take advantage of opportunities for improvement.
- The transfer of intellectual property to the organization staff will be much greater. In fact, projects should be conducted so that the ITSM coaches support the organization's staff. The staff should take the lead in the ITSM projects, while being supported by the coach.
- The CSIP will stand a much greater chance of success as the transition from the coaches to the "players" is a transition that can work at the speed of reality. This recognizes that different organizations and different people will absorb things differently and at a slightly different pace. Reality is a good thing – ignoring reality is not.
- The cost of the ITSM project, is likely to be much less than without the specialist ITSM coaching – when all these considerations have been taken into account.

Disadvantages

- The initial cost of the external coaching may appear, or actually be, more expensive for the first one or two ITSM projects that are undertaken as part of CSIP and will obviously be reduced significantly with additional projects as the organization staff gains knowledge and experience.
- There may be a fear of "outsiders" coming in to the organization and embarrassing staff.

Conclusion

The use of this approach shows that an organization has a clear understanding of the difference between their capacity to implement ITSM and their capability of doing so successfully. They understand that they may have the resource numbers to complete the ITSM CSIP, but do not have the sufficient skills, knowledge, or experience to do so in the desired timeframes, ensuring the realization of the needed IT and business benefits. You have to Do-IT-Yourself at some point anyway, so why start out that way, but with some expert advice to get you started off on the right foot.

It could be argued that ITSM is but the latest buzzword in IT. It looks simple enough to apply – after all, we are supposed to be doing most of it already. But, we all know that in reality we neither do it consistently nor sometimes even well.

Whether you have just heard of ITSM, have been following it for sometime, or even if you or some of your staff already have some ITIL training, implementing it is never easy, and there is no silver bullet. IT managers need to look critically at their organization and apply ITIL to their organization in a manner that is suitable to their business.

Below is a discussion of how an ITSM coach might be able to help your organization.

ITSM Coaching

Implementing ITSM can be a daunting prospect for even the most seasoned IT folks. But, just as in learning a new sport as a child (or as an adult for some of us), if we take things a step at a time, listen to our coach, practice what we are shown or told, and subject ourselves to critical review after each step, we can eventually do IT ourselves.

ITSM coaches can help you in areas such as:

1. Establishing the ITSM CSIP - Does the organization require an approach that is "strategy- driven" (part of the implementation of the organizational strategic plan or vision) or "operationally driven" (needed as part of addressing an existing operational problem)? The business drivers will impact the approach to the initial stages of the project. Are the drivers obvious or hidden? Is the project scope clear? Are all the stakeholders in agreement with it? Has it been written down and agreed upon? The coach can help the ITSM project sponsor (and manager) to better understand why the project is being done and obtaining agreement before proceeding.
2. Implementing specific ITSM processes – IT staff can take various ITSM training courses, and, even if the training is specifically designed for the organization, there will always be a need for follow-up – often one-on-one coaching. No training course, in absence of extensive prior experience in the process area, can deliver enough information to enable staff involved in ITSM projects to be able implement the ITSM processes well without further support. They will need someone to bounce ideas off, someone to review their progress, and someone to tell them if they are straying from the "best road forward." The coach can also maintain a consistency with all stakeholders and project staff.
3. Conducting reviews of implemented processes – once staff have implemented an ITSM process or set of related processes such as change, configuration, and release management, it is always a good idea for a third party review to see how well it has gone. The purpose of a CSIP is continuous improvement – so what better way to access success than to have someone independently review if it delivered, but in a coaching as opposed to a judgmental fashion. Auditors judge your flaws whereas coaches point out your flaws and help you with techniques and sound advice that help you get past them.

Summary

"The test of a good coach is that when they leave, others will carry on successfully."

- Author Unknown

Ultimately, every IT organization must choose what ITSM CSIP implementation approach will work best for them. Obviously, based on my experience, I am inclined towards the use of coaching.

Just like finally learning the actual rules to a sport you have played your whole life, ITSM CSIP implementations can make even the most experienced IT staffs look as if they are doing some of it for the first time. But, with good coaching it need not be that way. Neither need they be done for you by someone else. If you do that, when you finally have to do it for yourself you will not be that much further ahead than before you started.

IT organizations are continually striving for better performance and cost containment. They are forced to look for new and improved ways of delivering IT to vital business functions, which often means looking at the latest management trends and fads. Some purchase an IT Service Management tool and think it will solve all their problems. They hand it over to their staff to implement and are surprised when it is not successful or not as successful as it should be.

The role of an experienced ITSM expert who has been there before and is able to coach both management and staff in all the aspects of a complex ITSM CSIP, can save money, and improve the speed of implementations and benefits realization. The "fear of the outsider" must be overcome and replaced by the realization that a good ITSM coach can have the same effect on your ITSM CSIP as a good football coach can have on the success of the football team he coaches – no poorly coached team ever won a Super Bowl.

The real goal of an ITSM coach is not to be with you forever nor to do IT for you, but rather to help you carry on successfully on your own once they have gone on to help the next IT organization. You can Do IT Yourself!

About Larry Cooper

Larry is a senior IT business leader and author with over 30 years of private and public sector experience in Canada and the USA., where he has held roles such as a Software Developer/Programmer Analyst, Manager of Operations, Lead for Business Process Re-engineering, various Project Manager roles on projects upwards to \$100M, and A/Director, Business Technology. He has written and been published in books and industry articles on variety of topics. He holds three project management certifications including a PMP, an IT Service Manager certification, and is ITIL accredited trainer.

