

2012

ITIL® Service Offerings & Agreements (SOA) Video Training Guide



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Document Information

► Texts with this treatment are Alerts, and indicate important concepts.

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ITIL® eTrainer

Mentored Learning Video Training Program

Although this online, web-based course is available to you 24 hours a day, 7 days a week over the span of your license, you must exercise the same diligence and discipline as though you were sitting in a classroom program. The following training plan was designed to help you complete the video, reading and testing components of this ITIL certification program in an orderly fashion.

Step #1 - Locate the Important Documents Included within your Video Training Program

Please make note of four very important printable documents that are included with your course. If you have difficulty with the printing options please reach out to support@itsmsolutions.com for assistance.

- **Student Manual & Study Guide** – Chapter 1's table of contents of contains a copy of the student manual. The manual includes the instructor slides with amplifying information for each slide, the course syllabus, a glossary along with other support documents. Each video module also includes a student **Study Guide** which can be used to take notes throughout the training program.
- **Syllabus** – The syllabus for each class is located at the back of the student manual.
- **Checkpoint Booklet** – The checkpoint guide provides two very different types of study aids to the student. The multiple-choice quiz helps instill the terminology and knowledge of the subject area while the scenario based exercises help expand the knowledge gained to fit the context of the overall business environment.
- **Sample Exams** – The last section of each course contains sample exams provided by the official accreditor for those students looking to sit the actual certification exam.

Step #2 - Purchase and read a copy of the ITIL Core Book associated with the classes you are taking

Although not mandatory to sit for the exam, the accreditor strongly recommends that students purchase and read a copy of the ITIL Core book associated with the class being purchased. The reading of the ITIL book will help students prepare for the exam in addition to helping them understand how to apply what they just learned in a real-world environment, ITIL core books can be purchased from our book store @ <http://www.itgovernanceusa.com/category/291.aspx> or at amazon.com

Step #3 - Join our Online Mentoring Community & Sign Up for our Continuing Education Newsletter

The first step in establishing a connection to the mentoring community is to become a member of the LinkedIn Group “My ITSM Mentoring Community.” You can do this by going online to the professional networking community www.Linkedin.com, registering as a member (if you are not already a member), and joining the group [My ITSM Mentoring Community™](#). You may go directly to the group by clicking on the “Mentoring Community” link just below the “Login” link on the opening page of the online Learning course.

Once you are a member you can post your questions on the discussion board. The discussion board is monitored daily (9 AM to 9PM Eastern Time) by our team of ITIL Expert Mentors along with other students taking the online training programs. This forum will enable you to get answers to any questions you might have as you go through the program you purchased.

Students should also [register](#) to receive our periodic Do IT Yourself (DITY) continuing education newsletter. Each newsletter provides practical guidance on the key topics associated with ITIL and ITSM. Missed an issue? The DITY™ archive contains all issues organized by topic. Select a topic of interest and browse our archive for all the back-issues.

Step #4 - Follow the Video Training Plan Listed Below

The training plan below outlines in order the reading, lectures and testing components a student must complete to successfully prepare for the exam. Please refer to them in the order shown below.

If you are attending a scheduled **classroom or blended learning program**, please follow the schedule outlined by your training provider. If you are taking a **remote program**, feel free to set up a training schedule that aligns best with personal and professional schedules.

1. Read the Syllabus Sections Identified in the Video Training Plan
This will help you become familiar with the exam qualification scheme
2. Read the Core Publication Sections Identified in the Video Training Plan
While reading the core books is not mandatory to sit for the exam, the syllabus strongly recommends it as part of it's prerequisite entry criteria
3. Watch the Video Lectures and Reach out to the Community with Questions
Watch the instructor lectures on video, refer to the student manual for amplifying information, reach out to the community with questions, take notes in the workbook & complete all module exams & checkpoints until you score an 80% or higher
4. Take the Sample Exams to Understand your Exam Readiness
Review relevant videos & courseware to shore up problem areas. Reach out to the mentoring community for exam taking advice. Work with the training provider to schedule your exam when you have scored an 80% or higher on the sample exams

ITIL® Service Offerings & Agreements (SOA) Video Training Guide

For each section listed, read the syllabus first followed by the core book section then the video training program

Self-Paced Training Schedule (set by the student)	Chapter/Lesson/Topic	Read the Syllabus	Read the SS, ST, SO & SD core ITIL book sections listed below (optional but highly recommended)	Watch Videos	Section Complete √
				Take Notes in Workbook	
				Refer to Courseware for Amplifying Text	
				Complete End of Chapter Quizzes and Checkpoints	
Dates	Chapter 1: Course Introduction	Section #	Section #	Video #	
	Objectives	n/a	n/a	In Student Courseware	
	Terms-to-Know	n/a	n/a	In Student Courseware	
	Lesson 1 Course Organization			1.0	
	Welcome to the Course!	n/a	n/a	1.1	
	Mentoring Community Introductions	n/a	n/a	1.2	
	Why Are You Here?	n/a	n/a	1.3	
	Using Bloom's Taxonomy	n/a	n/a	1.4	
	What do you Expect?	n/a	n/a	1.5	
	Housekeeping Online	n/a	n/a	1.6	
	Lesson 2 Course Conventions & Agenda			2.0	
	Conventions Used	n/a	n/a	2.1	
	Quizzes & Exercises	n/a	n/a	2.2	
	ITIL Qualification Scheme	n/a	n/a	2.3	
	ITIL Intermediate Exams	n/a	n/a	2.4	
	Getting Started with an Online Class	n/a	n/a	2.5	
	End of Chapter Quiz	n/a	n/a	2.6	
	Chapter 2: PPO Introduction				
	Objectives	n/a	n/a	In Student Courseware	
	Terms-to-Know	n/a	n/a	In Student Courseware	
	Lesson 3 Introduction to SOA			1.0	
	Introduction	SOA01	SD, SS 1.2	1.1	
	Objective	SOA01	SS 4.1.1	1,2	
	Scope	SOA01	SS 4.1.2	1.3	
	Value	SOA01	SS 4.1.3, SS 3.6	1.4	
	Concepts	n/a	n/a	1.5	
	Lesson 4 SOA Principles			2.0	
	SOA Context	SOA01	SD, SS 1.2,	2.1	
	Service Portfolio	SOA01	SD, SS 1.2,	2.2	
	Service Pipeline	SOA01	SD, SS 1.2,	2.3	
	Service Catalog	SOA01	SD, SS 1.2,	2.4	
	SOA & Design Coordination Overview	SOA01	SD 4.1.1, 4.1.2, 4.1.3	2.5	

	SD & SLM	SOA01	SD 3.1.3	2.6	
	SOA & Value	SOA01	SS 3.2.3	2.7	
	Value of a Service	SOA01	SS 3.2.3	2.8	
	Creating Service Value	SOA01	SS 3.2.3	2.9	
	Perception of Value	SOA01	SS 3.2.3	2.10	
	Framing Service Value	SOA01	SS 3.2.3	2.11	
	Supplier Management	n/a	n/a	2.12	
	Lesson 5 SOA Context			3.0	
	Relationships	n/a	n/a	3.10	
	Information	n/a	n/a	3.2	
	Metrics & Measures	SOA01	SD 3.1.3	3.3	
	Challenges	SOA10	SD 9.1-9.3	3.4	
	SOA Processes	n/a	n/a	3.5	
	Lesson 6 SOA Summary			4.0	
	SOA Summary	n/a	n/a	4.1	
	Checkpoint Instructions	n/a	n/a	4.2	
	End of Chapter Quiz				
	Chapter 2 Review	n/a	n/a	4.3	
	Chapter 3: PPO Processes				
	Objectives	n/a	n/a	In Student Courseware	
	Terms-to-Know	n/a	n/a	In Student Courseware	
	Lesson 7 Service Portfolio Management			1.0	
	Introduction	SOA02	SS 4.2	1.1	
	Purpose, Goals & Objectives	SOA02	SS 4.2.1	1.2	
	Scope	SOA02	SS 4.2.2	1.3	
	Value to the Business	SOA02	SS 4.2.3	1.4	
	Concepts	SOA02	SS 4.2.4	1.5	
	Service Portfolio	SOA02	SS 4.2.4	1.6	
	Service Portfolio & CMS	SOA02	SS 4.2.4	1.7	
	Other Portfolios	SOA02	SS 4.2.4	1.8	
	Designing the Service Portfolio	SOA03	SD 3.7.2.1	1.9	
	Service Portfolio Methods	SOA02	SS 4.2.5	1.10	
	SPM Initiation	SOA02	SS 4.2.5	1.11	
	Define	SOA02	SS 4.2.5	1.12	
	Option Space Tool	SOA02	SS 4.2.5	1.13	
	Analyze	SOA02	SS 4.2.5	1.14	
	Approve	SOA02	SS 4.2.5	1.15	
	Charter	SOA02	SS 4.2.5	1.16	
	Retiring Services	SOA02	SS 4.2.5	1.17	
	Triggers, Inputs & Outputs	SOA02	SS 4.2.6	1.18	
	Relationships	SOA02	SS 4.2.6	1.19	
	Information	SOA02	SS 4.2.7	1.20	
	Critical Success Factors	SOA02	SS 4.2.8	1.21	

Challenges	SOA02	SS 4.2.8.9	1.22
Summary	N/A	N/A	1.23
Lesson 8 Service Catalog Management			2.0
Introduction	SOA03	SD 4.2.1	2.1
Purpose Goals & Objectives	SOA03	SD 4.2.1	2.2
Scope	SOA03	SD 4.2.2	2.3
Value to the Business	SOA03	SD 4.2.3	2.4
Concepts	SOA03	SD 4.2.4	2.5
Service Catalog Views	SOA03	SD 4.2.4	2.6
Activities	SOA03	SD 4.2.5	2.7
Agree & Document Service Definition	SOA03	SD 4.2.5	2.8
Interface with Service Portfolio Management	SOA03	SD 4.2.5	2.9
Product & Maintain Service Catalog	SOA03	SD 4.2.5	2.1
Interfacing	SOA03	SD 4.2.5	2.11
Service Catalog Example	SOA03	SD 4.2.5	2.12
Triggers, Inputs & Outputs	SOA03	SD4.2.6	2.13
Relationships	SOA03	SD 4.2.6	2.14
Information	SOA03	SD 4.2.7	2.15
Critical Success Factors	SOA03	SD 4.2.8	2.16
Challenges & Risks	SOA03	SD 4.2.9	2.17
Summary	n/a	n/a	2.18
Lesson 9 Service Level Management			3.0
Introduction to Service Level Management	SOA04	SD 4.3	3.1
Purpose, Goals & Objectives of Service Level Management	SOA04	SD 4.3.1	3.2
Scope of Service Level Management	SOA04	SD 4.3.2	3.3
Value of Service Level Management	SOA04	SD 4.3.3	3.4
Concepts of Service Level Management	SOA04	SD 4.3.4	3.5
SLM Overview	SOA04	SD 4.3.4	3.6
Activities of Service Level Management	SOA04	SD 4.3.5	3.7
SLA Frameworks	SOA04	SD 4.3.5	3.8
SLRs & SLAs	SOA04	SD 4.3.5	3.9
Improving Customer Satisfaction	SOA04	SD 4.3.5	3.10
Managing Underpinning Agreements	SOA04	SD 4.3.5	3.11
Service Reporting	SOA04	SD 4.3.5	3.12
Service Improvement Plan	SOA04	SD 4.3.5	3.13
Service Reviews	SOA04	SD 4.3.5	3.14
Managing & Revising SLAs & UCs	SOA04	SD 4.3.5	3.15
Contacts & Relationships	SOA04	SD 4.3.5	3.16
Feedback	SOA04	SD 4.3.5	3.17
SLA Components	SOA04	SD 4.3.5	3.18
OLA Components	SOA04	SD 4.3.5	3.19
Triggers, Inputs & Outputs	SOA04	SD 4.3.6	3.20
Service Level Management Relationships	SOA04	SD 4.3.6	3.21

Information	SOA04	SD 4.3.7	3.22
Critical Success Factors	SOA04	SD 4.3.8	3.23
Challenges & Risks	SOA04	SD 4.3.9	3.24
Service Level Management Summary	n/a	n/a	3.25
Lesson 10 Demand Management			4.0
Introduction	SOA05	SS 4.4	4.1
Objective	SOA05	SS 4.4.1	4.2
Scope	SOA05	SS 4.4.2	4.3
Value to the Business	SOA05	SS 4.4.3	4.4
Concepts	SOA05	SS 4.4.4	4.5
Activity-Based Demand Management	SOA05	SS 4.4.5	4.6
Business Activity Patterns	SOA05	SS 4.4.5	4.7
Patterns of Business Activity	SOA05	SS 4.4.5	4.8
User Profile	SOA05	SS 4.4.5	4.9
Matching UP to PBA	SOA05	SS 4.4.5	4.10
Demand Modeling	SOA05	SS 4.4.5	4.11
Managing Demand	SOA05	SS 4.4.5	4.12
Service Packages	SOA05	SS 4.4.5	4.13
Triggers, Inputs & Outputs	SOA05	SS 4.4.6	4.14
Relationships	SOA05	SS 4.4.6	4.15
Information	SOA05	SS 4.4.7	4.16
Critical Success Factors	SOA05	SS 4.4.8	4.17
Challenges & Risks	SOA05	SS 4.4.9	4.18
Summary	n/a	n/a	4.19
Lesson 11 Supplier Management Introduction			5.0
Introduction	SOA06	SD 4.8	5.1
Objective	SOA06	SD 4.8.1	5.2
Scope	SOA06	SD 4.8.2	5.3
Value to the Business	SOA06	SD 4.8.3	5.4
Concepts	SOA06	SD 4.8.4	5.5
Activities	SOA06	SD 4.8.5	5.6
Evaluate New Suppliers & Contracts	SOA06	SD 4.8.5	5.7
Supplier Evaluation	SOA06	SD 4.8.5	5.8
Contract Evaluation	SOA06	SD 4.8.5	5.9
Categorize Suppliers & Maintain SCD	SOA06	SD 4.8.5	5.10
Supplier Categorization Matrix	SOA06	SD 4.8.5	5.11
Establish New Suppliers & Contracts	SOA06	SD 4.8.5	5.12
Manage Supplier & Contract Performance	SOA06	SD 4.8.5	5.13
Renew/Terminate Contracts	SOA06	SD 4.8.5	5.14
Triggers, Inputs & Outputs	SOA06	SD 4.8.6	5.15
Relationships	SOA06	SD 4.8.6	5.16
Information	SOA06	SD 4.8.7	5.17
Critical Success Factors	SOA06	SD 4.8.8	5.18

Challenges & Risks	SOA06	SD 4.8.9	5.19
Summary	n/a	n/a	5.20
Lesson 12 Financial Management			6.0
Introduction	SOA07	SS 4.3	6.1
Purpose, Goals & Objective	SOA07	SS 4.3.1	6.2
Scope	SOA07	SS 4.3.2	6.3
Value to the Business	SOA07	SS 4.3.3	6.4
Concepts	SOA07	SS 4.3.4	6.5
Financial Management Activities Overview	SOA07	SS 4.3.5	6.6
Process Activities	SOA07	SS 4.3.5	6.7
Accounting	SOA07	SS 4.3.5	6.8
Accounting Activities	SOA07	SS 4.3.5	6.9
Cost Models	SOA07	SS 4.3.5	6.10
Cost Centers & Cost Units	SOA07	SS 4.3.5	6.11
Cost Types & Elements	SOA07	SS 4.3.5	6.12
Cost Allocation	SOA07	SS 4.3.5	6.13
Chart of Accounts			6.14
Analysis & Reporting	SOA07	SS 4.3.5	6.15
Action Plans	SOA07	SS 4.3.5	6.16
Budgeting	SOA07	SS 4.3.5	6.17
Budgeting Activities	SOA07	SS 4.3.5	6.18
Charging Activity	SOA07	SS 4.3.5	6.19
Charging Policies	SOA07	SS 4.3.5	6.20
Chargeable Items	SOA07	SS 4.3.5	6.21
Pricing	SOA07	SS 4.3.5	6.22
Billing	SOA07	SS 4.3.5	6.23
Financial Management Cycles	SOA07	SS 4.3.5	6.24
Return on Investment	SOA07	SS 4.3.5	6.25
Triggers, Inputs & Outputs	SOA07	SS 4.3.6	6.26
Relationships	SOA07	SS 4.3.6	6.27
Information	SOA07	ss 4.3.7	6.28
Critical Success Factors	SOA07	SS 4.3.8	6.29
Challenges & Risks	SOA07	SS 4.3.9	6.30
Summary	N/A	N/A	6.31
Lesson 13 Business Relationship Management			7.0
Introduction	SOA08	SS 4.5	7.1
Purpose, Goals & Objectives	SOA08	SS 4.5.1	7.2
Scope	SOA08	SS 4.5.2	7.3
Business Value	SOA08	SS 4.5.3	7.4
Policies, Principles & Concepts	SOA08	SS 4.5.4	7.5
Process Initiation	SOA08	SS 4.5.5	7.6
Customer	SOA08	SS 4.5.5	7.7
Service Provider	SOA08	SS 4.5.5	7.8

Triggers, Inputs & Outputs	SOA08	SS 4.5.6	7.9
Relationships	SOA08	ss 4.5.6	7.10
BRM & Lifecycle	SOA08	ss 4.5.6	7.11
Service Strategy	SOA08	ss 4.5.6	7.12
Service Design	SOA08	ss 4.5.6	7.13
Service Transition	SOA08	ss 4.5.6	7.14
Service Operation	SOA08	ss 4.5.6	7.15
Continual Service Improvement	SOA08	ss 4.5.6	7.16
Critical Success Factors	SOA08	ss 4.5.8	7.17
Challenges & Risks	SOA08	ss 4.5.9	7.18
Business Relationship Management Summary	n/a	n/a	7.19
Lesson 14 SOA Process Summary			8.0
Checkpoint Instructions	n/a	n/a	8.1
End of Chapter Quiz			
Chapter 3 Review	n/a	n/a	8.2
Chapter 4: Organization & Technical Implementation			
Objectives	n/a	n/a	In Student Courseware
Terms-to-Know	n/a	n/a	In Student Courseware
Lesson 15 Organizing for SOA			1.0
Who Does What to Whom?	n/a	n/a	1.1
The RACI Model	n/a	n/a	1.2
Functional Roles Analysis	n/a	n/a	1.3
Activity Analysis	n/a	n/a	1.4
Generic Roles & Responsibilities	n/a	n/a	1.5
Service Owner	n/a	n/a	1.6
Process Owner	n/a	n/a	1.7
Process Manager	n/a	n/a	1.8
Process Practitioner	n/a	n/a	1.9
Roles & Responsibilities	n/a	n/a	1.1
Service Portfolio Management	SOA09	SS 6.8.7	1.11
Service Catalog Management	SOA09	SD 6.3.6	1.12
Service Level Management	SOA09	SD 6.3.7	1.13
Demand Management	SOA09	SS 6.8.10	1.14
Supplier Management	SOA09	SD 6.3.12	1.15
Financial Management	SOA09	SS 6.8.9	1.16
Business Relationship Management	SOA09	SS 6.8.8	1.17
Lesson 16 Technology & Implementation			2.0
Technology & Implementation Consideration	n/a	n/a	2.1
Service Design - Technology & Design	n/a	n/a	2.2
Service Operation - Technology Considerations	SOA10	SO 8.5	2.3
Technology Implementation	SOA10	SO 8.5	2.4
Planning & Implementing Technology	SOA10	SO 8.5	2.5
Designing Technology Architectures	n/a	n/a	2.6

	Implementation Considerations	SOA10	SD 7.2, SD 8.2, 8.3, 8.4	2.7	
	Challenges, CSFs & Risks	SOA10	SO, ST SD 9.1.1 to 9.1.3	2.8	
	Challenges	SOA10	SO, ST SD 9.1.1	2.9	
	Risks	SOA10	SO, ST SD 9.1.2	2.1	
	CSFs	SOA10	SO, ST SD 9.1.3	2.11	
	Lesson 17 Organization & Technical Implementation Summary			3.0	
	Organizing & Technology for SOA Summary	n/a	n/a	3.1	
	Checkpoint Instructions	n/a	n/a	3.2	
	End of Chapter Quiz				
	Chapter 4 Review	n/a	n/a	3.3	
	Course Closure	n/a	n/a	3.4	
	Appendix: SOA Capability Certification Syllabus				
	ITIL v3 Glossary				

Exam Scheduling

Assuming you have scored an 80% or higher on all module exams and sample exams you are now ready to schedule and take your certification exam