How To Justify An ITSM Improvement Project To Executive Management

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Agenda

1. My Assumptions About You!
2. Why I Am Here
3. My Assumptions About "ITSM Improvement Projects"
4. Why Is This An Issue?
5. Examples Of Typical Projects
6. Checklist Of Critical Questions
7. The Shark Tank & The Dragon's Den
8. Presenting Your Proposal
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My assumptions about you

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My assumptions about you

1. You work in ITSM and have a few years of experience.

2. You find it challenging to get new things done because projects tend to drag on and on.

3. You're responsible for key IT assets (hardware, software, people, services).

4. You go to work each day with the intention of doing a good job.

5. You want the business you work in to be successful.

6. You'd like some advice from me on how where to focus.

Why I am here

"Success" for me

is about what I can
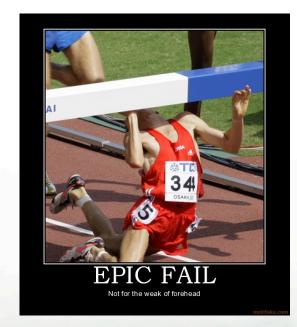
inspire **YOU** to achieve.

New knowledge is not enough,

I need you to change behaviors

so you can generate better results.

How do these ITSM improvement projects benefit the business?

1. Create a Service Catalog
2. Document processes
3. Implement a "new" process
4. Train/certify IT staff
5. Implement a new ITSM software tool
6. Build a CMDB
7. Conduct an ITSM process maturity assessment

Typical perceptions of ITSM

- IT often does not understand business objectives & priorities

- IT is too slow and unresponsive to new demands and requirements

- IT projects are usually behind schedule and over budget

- IT strategy tends to focus on technology and not business objectives

- The default answer is "Next year" or simply "No!"

- Increasing trend to bypass internal IT for external options (Speed, Cost, Control) – "consumerization"

EPIC FAIL
Not for the weak of forehead

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How was this project approved?

The "No-Brainer Project"

1. Improves business results
2. Saves money (or increases revenues more than any cost increase)
3. Can be implemented quickly and easily
4. No risks!

Sounds straightforward, but

"the devil is in the details"

Checklist of critical questions

1   WHAT is this project?

2   WHY should we do this project?

3   WHY should we do it NOW?

4   WHAT is the priority relative to other work?

5   HOW will we execute this project?

6   WHO will need to be involved?

7   WHO will need to be consulted?

8   WHO will need to be informed?

9   WHAT are the risks of proceeding with this project?

10   WHAT are the risks of NOT proceeding with this project?

11   HOW much will this project cost?

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The Dragon's Den of ITSM approvals

The **CEO** Dragon

The **CFO** Dragon

The **CIO** Dragon

The CEO Dragon

Focus is on business objectives

- Do you know your current business objectives?
- If not, where can you find out?
- Make reference to specific business objectives in your proposal
- Describe how the outcomes of your ITSM project will enable the business objectives

BE SPECIFIC!

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The CFO Dragon

Focus is on revenues & costs

- Make sure you know how much your project will cost
- Be realistic when estimating costs
- If the costs cannot be contained by the current budget – make sure there are very specific and achievable business benefits

BE SPECIFIC!

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The CIO Dragon

Focus is on IT resources & risks to IT performance & image

- Explain who will do the work
- Explain what tools and resources will be needed
- Explain how much time will be needed
- Explain the potential impact on other projects

BE SPECIFIC!

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Presenting your proposal

1. Begin by describing the business objectives
2. State how this project supports and enables the business objectives:

    –   Clearly list the positive outcomes

    –   Be specific!
3. Describe the project plan with key components & costs
4. Identify any risks (be honest!)
5. Recap how the outcomes will generate valuable benefits
6. Ask for approval to proceed

Business case development

Executive Management wants to know:

- Business impact
- Financial impact
- IT impact

REMEMBER

ITSM is not about adopting new processes!

It's about consolidation, improvement & reduction of current processes based on accepted/best practice – to enable the business to thrive!

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How was this project approved?

What do I do tomorrow?

1. Verify your business objectives:
   - Talk about them with your team
   - How are activities DIRECTLY supporting the business objectives?
2. Verify that current ITSM projects are addressing all the Executive Management requirements
3. Read blog article by Troy DuMoulin: "Fit For Purpose ITSM Processes": http://blogs.pinkelephant.com/index.php?/troy/comments/fit_for_purpose_itsm_processes/
4. Follow my advice for your future ITSM improvement projects – and let me know how it works out!

Thank you for attending this session.

Don't forget to complete an evaluation form!