

# IT SERVICE MANAGER

A publication of ECPweb.com

September 2006

**U**NDERSTANDING  
WHAT ITIL ISN'T  
IS AS IMPORTANT  
AS KNOWING  
WHAT IT IS. IF  
YOU EXPECT IT TO  
BE EVERYTHING,  
YOU'LL BE SADLY  
MISTAKEN.

— JEFFREY TRAMEL, EDS

## > ITIL Gains Momentum in North America

*Industry leaders offer opinions and advice on what makes ITIL work.*

## > Are You Ready for ITIL?

*Our survey examines seven readiness indicators and confirms ITIL is here to stay.*

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## After Taking the Slow Boat Across the Atlantic, ITIL Gains Momentum in North America

The Information Technology Infrastructure Library has received substantial coverage in America's specialized IT press in the last few years, but to most (except for multinational companies and a few others) ITIL® remains a new, intriguing, and frequently misunderstood European phenomenon. ITIL is so new in North America that there is no agreement yet on how to pronounce the acronym. Some call it "eye til," some "it - il," and a few just spell out the letters, I.T.I.L. This inconsistency is understandable — ITIL is a relatively new arrival on North American shores. The framework originated in the United Kingdom in 1989, when the Central Computer and Telecommunications Agency (CCTA) developed it to help government IT departments manage their burgeoning data systems and the staff who maintain them. When the framework turned out to be quite effective, its use spread across Europe in the 1990s. For the most part, Americans are just now discovering its usefulness.

To gain a range of perspectives on the ITIL framework, ECP set out to talk to experts in the United States, Canada and Europe, from organizations that included government agencies, software publishers, a major chip and memory maker, a pharmaceutical company, several IT outsourcers, and a global financial transactions company. (A partial roster of our sources appears at this article's end.) To tap into the experience of these people who've worked with ITIL, we posed basic questions such as, What is ITIL? What is it good for, and not good for? How should organizations go about implementing it? How do they get started?

Many U.S. organizations we contacted have not yet tackled ITIL, or are just getting started. "Sorry, we don't use ITIL and I don't know when we will," wrote the IT manager of a large metropolitan transportation authority, adding, "We believe it is the way we need to go eventually. We

are just not in a position to implement it yet." A corporate CIO told us, "We are just planning to start our ITIL program with incident/problem processes, which we will implement later this year."

The IT manager of a pharmaceutical company described its SAM program as very mature and successful, but explained: "We are only using bits and pieces of ITIL procedures, no formalized ITIL processes." His company has 3,400 employees, but no ITIL expert among its approximately 350 IT workers, including 150 contractors. "We used to have an ITIL-certified person. She left the company about a year ago. We're lean and mean and have no plans to implement ITIL. I think they make it over-complicated and complex. I think it's not necessarily useful to us."

The good news is that there are companies out there who have implemented the framework and have experts who were willing to share their opinions about ITIL, as well as some practical experiences. What follows is not intended to be a primer on ITIL. The experts agreed on many things, but they also disagreed on some key points, and we've recounted those arguments here for readers to examine. Our goal is not to summarize or explain the ten books that make up the framework, but to give readers a better idea of what ITIL is and whether it's something that would help their IT departments.

### What is ITIL?

Although ITIL can be different things to different people, objectively speaking, it is a framework, comprising ten books of guidelines on how to standardize an organization's IT service-management processes, strategy and terminology. ITIL is divided into two groups of processes: the first, service support, includes processes for service desk, incident

management, problem management, configuration management, change management, and release management. The second group, called service delivery, includes processes for service level management, capacity management, IT service continuity management, availability management and financial (asset) management for IT services. Most ITIL experts said they had started with the service support processes, and many had not yet moved on to service delivery processes. (Some IT pundits capitalize the process names to emphasize their importance. That makes for hard reading, however, so we'll stick with the humble lower case here.)

In our interviews, we heard many times that ITIL is not a step-by-step manual to IT process management. "It isn't a bible," says Brian Johnson, who should know what he's talking about: he contributed to writing the original ITIL volumes and is now the global practice leader for ITIL at CA, based in New York. "The biggest myth about ITIL is that you have to follow every word in every book. There are no ITIL police out there. You take what you can use and leave the rest," says Johnson. That's nice to know, but if it's not a manual, then what is it good for? "ITIL is mainly about cultural change in a company, to make sure your IT department is aligned with your business goals," says Johnson. "It shows you ways to implement good standards to ease the work of dealing with a lot of different people as part of maintaining an IT system. However, it doesn't tell you exactly how to do that. That's up to you."

One thing ITIL helps with is getting a company's IT people to speak the same language, saving a lot of confusion and time. "Terminology is a big piece of it, especially in multinational organizations," says Robert Molenda, a California-based systems architect and manager for help desk platforms at Munich-based Infineon

A.G. “Especially in big companies, people call the same thing by different names. They’re talking about the same thing without knowing it. ITIL establishes a common terminology across an organization. There is a lot of good that can come from that,” says Molenda. Infineon, with 43,000 employees, including about 4,500 in the United States, has a mature ITIL implementation, says Molenda.

Arjen Droog, CEO of ITSMF’s (IT Service Management Forum) Dutch branch, says ITIL is a collection of best practices that can help an organization produce a coherent IT model to improve IT delivery. “In the U.K., all government IT organizations had to adapt to this framework during the 1990s, and when the CCTA made it public domain, it was easier to implement for private businesses.”

Says Molenda: “ITIL is a good starting point for people who don’t have processes. For those who do have processes, it’s a good way to standardize. In a big corporation, with a lot of disagreement about how to do something or what to call it, ITIL provides a way to go by the book.”

But as Johnson sees it, “Any big company has processes, even if they don’t know it. All ITIL does is create a common language. It also helps organize IT, so people know what things cost and where the pain points are,” i.e., where the organization is wasting money, time or effort. Johnson says 1,500 of CA’s 15,000 employees worldwide are ITIL-certified.

Those who know ITIL best also advised some caution along with their enthusiasm. “People are looking to ITIL for answers to things that ITIL has nothing to do with,” for example, life-cycle management, says Johnson, advising, “It behooves all of us to ask good questions, to have a realistic idea of what ITIL really is.”

### How far along is your company with ITIL?

Of the American companies using ITIL, some have basic implementations, and

some, particularly the multinationals, have quite advanced implementations. Jeffrey Tramel of EDS is the asset-management process owner for the Navy Marine Corps Intranet (NMCI). In ITIL-speak, that means he’s in charge of managing the asset management process. “EDS began with ITIL more or less in 2001, and I took my first class about four years ago. We’re using ITIL in our relationship with our clients, implementing the framework contract-by-contract for our customers,” says Tramel. EDS is one of the world’s largest IT outsourcers, with more than 100,000 employees.

“We had a head start on implementation,” says Tramel. “We were using the Capability Maturity Model for software development and the Quality Management Model — in other words, we had a lot of processes, procedures and discipline. So, ITIL was just another step on the paths we were already on. CMM and QMM deal with slices of the organization, vertically, whereas ITIL takes a more operational view of IT — the back office and help desk.”

“Now, configuration management is coming together for us company-wide. Our next step is full implementation by account and customer,” says Tramel.

As ITIL picks up steam in North America, other IT-services companies, smaller than EDS, are specializing in implementing the framework for others. “I implement ITIL and ITAM [IT asset management] all day for Fortune 500 companies,” says Scott Fuzer of Chicago-based Five9 Technologies. “My focus is on ITIL and ITAM and the organizational change necessary to do these processes.”

As CIO for the Peel Region government in Brampton, Ontario, Roy Wiseman has implemented ITIL on a much more modest scale, setting up a program using only spreadsheets and lists, and a service management application suite, but no configuration management database (CMDB). “We’re about two years into it,” says Wiseman. Peel Region has 3,500 employees, including 83 IT people. “One of the things happening in our organi-

zation is the professionalization of IT services. ITIL fits right into that,” says Wiseman.

“We learned about ITIL from an HP presentation on IT service management,” he says. “An initial maturity assessment model told us that we were not very far along the curve. We identified the actions we needed to take and focused on service support processes. Two years later, we got re-assessed and found we were pretty close to meeting our initial objectives. ITIL is helping us with technology planning — 50 percent of our IT people are in tech support and infrastructure and the other half are working on new projects.”

“We’re also working with the COBIT [Control Objectives for Information and related Technology], framework. COBIT is broader than ITIL, and version 4 actually altered part of its structure to incorporate ITIL,” says Wiseman. “We’ve got an asset management project that we’ve tied into ITIL, making the [asset] information and attributes available to the system. A CMDB would take us one step further.”

“I think we actually did a lot of things right,” he adds. “We’re wrapping up our phase one: the first five processes,” says Wiseman. “Phase two is to tackle the other five, service delivery, and the CMDB.”

Ben Rewis, in charge of Visa’s global IT management, leads one of the world’s most successful ITIL programs, according to ratings by industry analysts. Says Rewis, “We started with incident management, and now we are also implementing asset, change, problem and configuration management processes. We’re integrating systems, tools and ITIL processes, as well as quantifying metrics. We have implemented several Visa ServiceViews and are starting to plan for release management.”

“Infineon is a German company, so it started implementing ITIL in 1998–1999,” says Robert Molenda. “We were doing it (ITIL) before almost everyone else in the United States.”

## What does ITIL replace? What problems does — or did — ITIL solve? What benefits does ITIL bring?

For Visa, the world's largest consumer payments system, with 20,000 issuing banks and 24 million merchants, ITIL augments existing processes and tools and its benefits can be clearly measured, says Ben Rewis. "The Visa purchase authorization process is a very complex event. We're four years into our program for implementing ITIL processes and we've been able to improve response time, availability and monitoring. In a system that can process 10,000 authorizations per second, a \$1.7 trillion-a-year flow, we've improved availability of authorizations by 75 percent. We've turned a five-minute mean time to restore into a one-minute mean time to restore," he adds. "On these volumes, tiny percentages of efficiency gains generate very large financial returns across the ecosystem. All players win: the merchants, acquirers and card issuers; and we sit in the middle."

"When I was put in charge of global systems management four years ago, I knew I needed a framework that would align metrics, improve service levels and availability, and establish a common nomenclature. We are processing 100 million transactions a day, forecasting a 60 percent increase to 160 million by 2010, but we intend to keep our operating expenses as flat as possible," says Rewis. "Our 1-800-VisaNet call center clients used to call us with their problems much more than we called them. In the last two years, we now call them more than they call us, because our authorizations management infrastructure lets us know what the system problems are, and how to fix them proactively."

"There are two halves of IT, we either build stuff or run stuff. Service support works so well under ITIL, largely because relationship management (relationship between configuration items) is managed under the CMDB," explains Rewis.

"You change something, which can break something else. That's not a new idea, but ITIL provides a better way to manage it. IT people can work on something else, because you reduce the number of fires they have to put out. Another example is a worm attack. The CMDB can quickly show me all the Windows servers that don't have all the service packs applied, which shows me any vulnerability. What I'm trying to do is reduce the costs needed to increase maturity, and create a single source of truth."

*In a system that can process 10,000 authorizations per second, a \$1.7 trillion-a-year flow, we've improved availability of authorizations by 75 percent. We've turned a five-minute mean time to restore into a one-minute mean time to restore.*  
— Ben Rewis, Visa International

Over at Five9 Technologies, Scott Fuzer agreed about the importance of the CMDB and relationship management. "According to industry analysts, 70 to 80 percent of service outages are due to some change somewhere else in the system. The CMDB allows you to track, identify and control all your relationship information — your critical missions and business services, IT services and underlying IT components. This way you control those mission-critical changes and hopefully reduce downtime and outages."

For Fuzer, there's a gray line between ITIL and ITAM. "There's flexibility in both frameworks. You can pick and choose. This can help with a key vulnerability of organizations — 60 to 70 percent of critical corporate data is kept on laptop hard drives. ITIL, teamed with ITAM, helps keep track of that valuable data."

ITIL brought in a standardization point for Infineon, says Molenda. "It gets people to standardize on the way they do things to

fix problems, and it helps an organization establish standard processes, but the nice thing is that it's not cast in concrete. You can adapt it to your needs."

Jeffrey Tramel of EDS also looks at ITIL from an ITAM perspective. "ITIL really helps the availability of IT to the business. It helps with staying on top of preventive features and makes sure overall improvement to IT will be there. ITIL centralizes service management, by bringing in the concept of the service desk, so all calls go into the desk, which doles out the work. But ITAM helps us plan ahead and understand the business, particularly when setting up service level agreements. You know what you can expect, what the finances are, the whole picture."

For Molenda, "The obvious value and benefit of ITIL is in consolidating two tools into one, for example, service and call centers, and combining processes. It also gets people thinking about their roles." But at Infineon it is difficult to determine a return on investment on ITIL. "You can't calculate it except in abstract terms. If you didn't have formal processes before, how do you establish your baseline numbers?"

Effective ITIL service processes provide a company-wide benefit by helping IT people keep pace with staff need for help with their computers and applications, many experts said. At MRO Software (acquisition by IBM announced in August 2006), before ITIL, the IT department was constantly fighting fires. "You had to have an inside relationship to get responses to your problems!" says Don Busiek, product strategy manager at MRO Software. "Now, you don't have to chase the IT guy all over the building to get help. There's a process in place. That takes away the hierarchization, from an end-user's perspective, which can increase employee and end-user satisfaction, and, with the job market picking up, that's important. IT self-help goes up. Incident-response time improves, as does uptime, and it pushes work down to appropriate levels. It makes sure the

appropriate-level resource is doing the appropriate work. It also helps align the IT department to the business, without doing it haphazardly.”

Peel Region’s Wiseman related, “ITIL gave us a structure and defined rules for IT and support. One of our early areas of improvement was managing change and interrelationships. Before, changes could have unanticipated effects. You’d ask, ‘Who did something?’ Now, changes are made at a scheduled time, so we’re more aware of their impact. We don’t have to guess.”

“ITIL says to improve your solve rate and call-resolution rate,” says Wiseman. “We know what they are now and that they are better. But we can’t compare with the past, because we didn’t even have a number before.”

“In documenting processes, you find, of course, that they aren’t being applied the same way everywhere. People are applying their own spin. We used process maps: How do we want this done? Who does it? It makes processes stronger and more consistent, because we’re very clear on who’s doing what. Processes are not dependent on the skills of individuals, and you can provide a consistent level of service to your clients. That’s what professionalization is about. Our focus on [quality] standards certainly fits in with that,” Wiseman adds.

### Why were the Dutch early adopters of the framework ?

“For some reason, ITIL perfectly matched Dutch organizations’ culture — they’re both not very hierarchical,” says Arjen Droog of ITSMF Netherlands. “It was a huge success in the Netherlands, much bigger even than in the United Kingdom. Sixty-five percent of IT organizations in Holland have adopted ITIL and vendors have all adopted it. You won’t be taken seriously if you don’t. In the Netherlands, the top 1,000 companies all have very successful implementations. It was only the service-desk processes in the beginning, the most important thing. But in the

last few years, service delivery processes have made a huge move forward.”

CA’s Johnson adds, “The Dutch were interested in ITIL even before it was finished.”

“For a while, Holland was the most advanced ITIL country in the world. But there’s a saying in Holland, when you’re ahead, you will quickly be behind,” says Droog. “In the United States, they don’t need to rediscover the wheel as they implement ITIL. We already did that here. So it may be that they will

implement processes of higher quality. In the Netherlands, ITIL was done because everyone was doing it. No one will implement ITIL in the United States without a proper business cause, which will really improve the quality and effectiveness of implementation.”

### Why have U.S. companies and organizations been slow to adopt ITIL?

Brian Johnson arrived at CA about 18 months ago to help with the company’s fledgling ITIL program. “Like a lot of American software publishers, CA realized that to fail to have an ITIL message was a money risk,” says Johnson. “Still, although more than a decade ago there were pockets of awareness about ITIL at CA, it was not known company-wide. In England, CA recognized the importance, but nobody in North America even knew what ITIL was in 1995. That didn’t happen really until about 2000, even 2001.”

“Certainly where it was invented is a big factor, and you do still hear, ‘I just don’t get this ITIL thing,’ says MRO’s Busiek. “It could be that in the United States, IT departments go at it thinking, how do we align with the business? Whereas in

Europe they say, ‘How does my IT department get better?’ In the U.S.A., it’s more of a business focus. Still, I hear a lot more people talking about ITIL than I did three to four years ago.”

*In the Netherlands, ITIL was done because everyone was doing it. No one will implement ITIL in the United States without a proper business cause, which will really improve the quality and effectiveness of implementation. — Arjen Droog, ITSMF Netherlands*

“It started in Europe. The place of origin does make a difference,” says Tramel. “But now, in America, ITIL defines a role that’s more pertinent to the business and financial management side of the house. So it’s starting to make sense here.”

“We’re definitely seeing a lot of organizations interested,

dipping their toes in the water,” says Fuzer. “One of the largest, most aggressive implementations of ITIL in North America is that of the Health Care Services Corporation (HCSC), one of the largest BlueCross-BlueShield companies.”

### How does an organization go about implementing ITIL?

The consensus is that you should start with training. “I got certified in ITIL early on,” says Rewis. “Now we have 350 people certified. Our goal is 1,000. Certification gets people speaking the same language.”

“First, I would get some training, do some research and talk to other companies,” advises Tramel. “Find out how it may or may not fit your organization. Plan an operating model for implementation. Understanding what ITIL isn’t is as important as knowing what it is. If you expect it to be everything, you’ll be sadly mistaken. You’re going to need somebody in the company who becomes a master, and knows this thing inside out.”

“Training gets the entire management group involved,” says Wiseman. “All of our IT management, about 16 people,

have foundation-level certification across the whole ITIL framework. Those who have responsibility for a process get practitioner certificate level [training] in that process, for example, service management. All 80 of our IT people have at least gone through a five-day training program to learn ITIL terminology, so that it is part of our vocabulary.”

“Nurture understanding,” says CA’s Johnson. “Make sure your people get it first.” To do that, Johnson took a novel approach. He hired the Dutch company Gaming Works to conduct its Apollo 13 interactive ITIL/ITSM training game for CA employees. The program, loosely based on the experiences of Jean Krantz, the NASA chief who managed the rescue of Apollo 13’s crew following an in-flight explosion, is aimed at improving problem solving and teamwork, as well as increasing employees’ knowledge of ITIL and ITSM. “Krantz arranged NASA around processes,” says Johnson. “During the Apollo 13 crisis, he figured out that astronauts needed oxygen, fuel and trajectory, and that everything else was extraneous. Businesses can learn from that focus, and also the idea of producing success from failure — ‘Get the guys back to earth.’ My experience is that with foundation training [formal ITIL courses and testing] you get smart people passing a fairly easy test without really learning much. Apollo 13 is more fun than foundation training and has had good results for us in awareness training.”

So, after you know what ITIL is, what next? While they didn’t always agree on the details, our experts did offer some valuable advice on where to start.

“The most important processes to start with are incident and change,” says Molenda. “They’re critical for every service organization, and people-focused. Determine what your crisis of the day is. After that, you can get to the fluff and fold, which is asset management, the CMDB and SLA (service level agreements). A lot of people do these before they’re ready, because they have some consultant selling them something that they’re not ready for.”

“You don’t just buy a big software package and install ITIL,” says Tramel. “You’re going to have to document your processes — X, Y and Z. ITIL is just the skeleton with no meat or muscle on the bones. That’s up to you. OK, you can buy the CMDB. But you still will have to develop a plan for centralized services and availability of systems.”

Wiseman concurs, and adds: “Conduct an initial assessment of where you are. You probably have a long way to go. What do we have to do? You won’t get ‘ITIL-ed’ in six months! It will take you two, three, five years.”

“I don’t think you can tackle the whole suite in one piece,” says Busiek, referring to MRO’s service management tools. “You have to break it down and tailor it to your organization. The project manager has to look at incidents, problems and the service desk. What’s your biggest pain point? Do release management first if you’re having problems in that area. One good thing about ITIL is that it’s compartmentalized. Where do you have the most control? There’s no prescribed method that says, ‘do these five steps first.’ Part of it is managing expectations — it’s not a magic wand. End users have to know how it will affect them. Before we developed our products, internally we started out by doing a bunch of end-user surveys. As an IT group, where are our strengths? What carrots can we use to get people to follow the program?”

Ben Rewis at Visa advises taking it one step at a time, after first making a plan. “The mistake I see some people make is trying to implement too many processes at once without understanding the sequence,” says Rewis. “You have to build the plan first. One of the first things we did was to establish a seven-year strategy for higher quality (IT) service. We knew we wanted to get to a managed-service state. I looked at a lot of trouble tickets and saw that 80 percent of the time was spent figuring out what the problem was — there are 60 million lines of code. So now instead of 12 people taking 24 hours to solve a problem, a smaller team can do it in an hour.”

“Another thing is that people don’t get specific enough about the business problem they are trying to solve,” says Rewis. “Remember, customers don’t care what process framework we use, they want the service to work. Get the organization’s business people to buy in. How do we show them the value of what we do? [We put it] in business language. For example, ‘we’ll cut costs, generate revenue and increase transaction volume.’ Show them the ROI numbers. IT people don’t do that enough.”

Johnson says, “How to start? It depends on your needs. Some people might dive straight into the CMDB, but that’s not the best approach in a lot of cases. You should determine your biggest problem in IT. You have to go at it in a way that will get the business people to buy in. What can we do to improve the business? Cut costs? Improve IT availability?”

Molenda says that’s not so easy. “Yes, ideally, management should buy in from the top down, because it’s a change in culture: ‘This is what we’re doing and why.’ But my experience is that there is a lot of resistance. People are reluctant to change. I don’t think anyone really gets to 100 percent compliance, maybe 80 percent to 90 percent is realistic.”

## What kinds of organizations would or wouldn’t benefit from ITIL?

“ITIL is all-encompassing and complex, but that doesn’t mean a small IT shop won’t benefit from it,” says Tramel. “Establishing SLAs is a great [way of] documenting what I’m here for and what you can expect from me. Configuration management lays out everything an IT shop should have from a structure point of view. I wouldn’t shy away from ITIL. I think it’s the right thing to do.”

Johnson points out that, “OGC [the UK agency that now owns ITIL] actually has only about 130 computers. Automation takes the waste out of running an IT department, implementing good standards to ease the work. Any size business can benefit from that.”

“Bigger companies have adopted ITIL, but the basic tenets apply to companies of all sizes,” says MRO’s Don Busiek. “I do think, however, that the bigger the organization, the more deeply goes its value to the business. My take is that a small company doesn’t need deep implementation.”

“Any organization benefits from the efficiencies,” says Scott Fuzer, of Five9 Technologies. “But most organizations we work with are in the health services and financial services sectors. They tend to spend a high percentage of their revenue — huge investments — on IT. The second reason is the regulatory requirements from SOX, HIPAA [Sarbanes-Oxley Act and Health Insurance Portability and Accountability Act] and FDIC. These organizations are audited frequently. ITIL addresses these issues.”

## What are the components and tools of ITIL?

There is a wide variety of approaches to managing ITIL processes. However, almost inevitably, a question about ITIL tools ends up with a discussion of CMDBs, their mechanics and uses, and the comparative merits of asset management databases.\*

Peel Region is using the HP OpenView suite of products, says Wiseman. “It has capability for full ITIL incident and problem management. Initially we thought we’d get more value out of documenting processes, as we’ve only been using lists and spreadsheets. That only takes you so far. Now, we’re looking more at the tool side, in particular a CMDB to manage interrelationships. That’s a big project on its own.”

“We have a very sophisticated setup using an Atrium CMDB — roughly 10 discrete CMDBs fed by 40 sources of data and 70 services,” says Rewis. “It’s a major services-oriented IT infrastructure that allows us to slice and dice problems.”

“We’ve worked with BMC for incident, change and problem management and Interlink Software for ServiceViews (Int-link.com) and newScale for service requests, to name a few,” says Rewis. “We are often pushing the envelope in terms of tools. Visa’s worldwide infrastructure requirements fold into a large part of vendors’ product functionality — we’re a great source of requirements for people who develop software.”

“I view asset management systems as a source of configuration data, pumping this data into our platform CMDB,” says Rewis. “You can use an asset tag to pull a subset of CI [configuration item] attributes to populate the CMDB. We are in the middle of converting to [BMC] Atrium CMDB, which will take us about three years.”

But don’t confuse the CMDB with the kitchen sink, warns Fuzer. “We find that many organizations don’t have the bandwidth to handle the process of keeping everything in the CMDB, so it slows down and dies under its own weight. People stop using it. To solve this problem, we’ve been managing non-critical components in the asset management system. Tool vendors will tell you, even if you could put everything in the CMDB, you’d still need an asset management program. CMDBs are not set up to manage financial and license management, ITAM life-cycle and IT portfolio management, for example.”

“At insurance companies, the CMDB helps address critical systems. Customer information is really controlled and sub-

ject to governmental regulations. ITAM is much broader. There is also an increasing desire to manage and track corporate data on these assets,” says Fuzer.

“The challenge of the CMDB is keeping it up to date,” he adds. “We used to update the CMDB in an automated fashion, but inventory management agents were not always working, not collecting up-to-date information. So, we were doing CMDB impact analysis using stale data. We learned early on that we had to have an update-process collect configuration item information consistently and regularly.”

“No matter what the technology or vendor, at the end of the day, I’ve yet to see an agent that worked all the time when we don’t have a person responsible for making sure the agents work,” says

Fuzer. “The technology part is easy. People and processes are still the biggest reasons for failures of accountability.”

Molenda says that CMDBs are popping up because everyone has a need for them, but warns that they are not the best place to start with ITIL. “Most people decide on the tool before they have the processes,” says Molenda. “They get the

cart out but leave the horse in the barn. Later they may find out that the tool they bought is not sufficient for their needs. You have to define your processes before you buy the tool.”

*Most people decide on the tool before they have the processes. They get the cart out but leave the horse in the barn. Later they may find out that the tool they bought is not sufficient for their needs. You have to define your processes before you buy the tool.*  
— Robert Molenda, Infineon

## What is ISO 20000?

ISO 20000 is a standard for IT service management (ITSM) that purportedly draws on ITIL principles. The Office of Government Commerce (OGC), which absorbed the CCTA in 2001, describes

\*For a discussion and review of CMDBs see *Tools Manager*, Fall 2006.

ITSM as a “top-down, business-driven approach to the management of IT that specifically addresses the strategic business value generated by the IT organization and the need to deliver a high quality IT service.”

“ISO 20000 is not an ITIL standard,” says Johnson. “It is somewhat based on ITIL, but ITIL is only a framework. [Some with vested interests] did come up with something very carefully worded in the United States, along the lines that ITIL is the basis for ISO 20000. They want people to believe that, because they want to sell their products.”

“I’d say a lot fewer people will go for ISO 20000 than ITIL, because of the investment required,” says Johnson. “To get certified for ISO, you have to bring in auditors and demonstrate that you have processes under control, for example. Depending on who you are (a vendor of IT services for example) ISO 20000 might make sense. If your IT department is afraid of being outsourced, or if you’re awash in money, it might make sense.”

“In ITIL, service reporting is fragmented, so it’s difficult to have a clear vision for relationship management and vendor management, i.e., business relationship management,” says Droog. “ITIL doesn’t have this [service reporting], which has caused a lot of problems. ISO 20000 has all these things. It incorporates the ITIL processes, but also expands a lot from it.”

“ISO 20000 is nothing more than a mechanism of certification,” says Fuzer. “ITIL version 3 will improve hooks into ISO. The idea is to use ISO as certification of ITIL. As of now, an organization can’t get certified for ITIL. People can, but organizations can’t. ITIL penetration in the U.S.A. is increasing, as a de facto standard for IT service management. ITIL is pretty robust, but there are gaps and people want to be certified. Another thing hindering ITIL, a big gaping hole, is its weakness in ITAM and SAM. The ITIL book on ITAM is simplistic, no discussion about hardware at all.”

## What do you see as the near-term future for ITIL?

“I see a convergence and tweaking of ITIL and ISO standards in five to ten years,” says Busiek. “I think you’ll see concrete steps for easy implementation of ITIL, with books and methods from those cottage industries.” Vaughn Haring, head of media relations for MRO Software, adds, “We could see an ITIL minor at university IT departments.”

“In trade shows and conferences in the last six months, there’s been discussion of how to combine and configure the CMDB and asset repository,” says Fuzer. “How do we interface with the asset repository? So far, very few end-user organizations are doing integration between the CMDB and SAM.”

“I think in the next two years that [interest in] ITIL will push the whole ISO thing, and ITAM will get absorbed by ITIL,” says Fuzer. “So one framework will provide and manage services and asset support. The sooner the better, in my opinion.”

**Rick Mitchell** is a contributing editor for ECP publications and is based in Paris.

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Many thanks to these industry leaders for their contributions:

*Don Busiek*, MRO Software

*Arjen Droog*, ITSMF Netherlands

*Scott Fuzer*, Five9 Technologies

*Brian Johnson*, CA

*Robert Molenda*, Infineon A.G.

*Ben Rewis*, Visa International

*Jeffrey Tramel*, Electronic Data Systems (Tramel is the winner of IBSMA’s 2006 SAM Practitioner of the Year Award)

*Roy Wiseman*, Peel Region Government

## Is a version 3 of ITIL coming soon?

*“Version 3 is being developed, with many people around the world working on the refresh project,” says Arjen Droog, of the ITSMF. “Version 3 is a big question. The difference between versions 1 and 2 was already huge.”*

*“I’m a bit skeptical of a version 3,” says Brian Johnson of CA. “If it’s not broke, don’t fix it. There are rumors that they are looking at a different approach based on software life-cycle support. If they are going to change it, they are going to have to provide a migration path. The whole thing is a bit unclear. Are they going to withdraw version 2? Why change directions now? What happens to the people who have adopted version 2?”*

*In June OGC released further details of a new set of core ITIL books, planned for April 2007. The five volumes present a life-cycle model from design to retirement. Working titles are Service Strategies, Service Design, Service Transition, Service Operation and Continual Service Improvement. For more information visit [www.iti.co.uk](http://www.iti.co.uk).*

## ITIL Makes its Entrance in North America: A Report on ITIL Readiness of U.S. and Canadian Businesses

As recently as 2004, respondents to an ECP survey of IT trends and topics did not include ITIL®, the Information Technology Infrastructure Library, on a list of their five most important IT initiatives. Many did not even recognize the term. Just two years later, however, ECP's latest ITIL poll finds that awareness of the framework has increased markedly in corporate America. Meanwhile, U.S.-based tool providers Altiris, CA, BMC Software, Hewlett-Packard, IBM and others have rolled out new and re-branded products geared for an emerging ITIL marketplace.

Early this year, ECP conducted a comprehensive survey of IT managers at U.S. and Canadian firms, asking them to assess their organizations' readiness to undertake an ITIL-focused IT service management program. Of the 55 respondents, half indicated they were evaluating or starting an ITIL program. Many reported that ITIL foundation certification is standard training for new hires.

Most responding firms reported that they were still assessing ITIL. Some said they were actively launching it, but only a few had advanced as far as developing a program. Fewer still reported having personnel fluent in the ITIL philosophy. Nevertheless, most firms reported that the business need for ITIL was well understood at their organization and that management backed a transition to a process-oriented culture. Firms cited a wide range of reasons for starting an ITIL program, but process improvement and improving IT service were named most often, followed by a need to reduce costs and increase software-license and regulatory compliance.

Most of the firms predicted they would achieve a positive return on their ITIL investments, including those still very early in their launch efforts. However, to

date there are no documented studies on cost savings attributable to ITIL implementation. Efficiency improvements are more difficult to measure, as most organizations don't have verifiable data or benchmarks to compare measurements over time.

### Methodology

In the winter of 2006, IT managers from a wide range of organizations answered an online survey of 78 questions covering the status of ITIL in their organizations. The eligible pool of respondents included experienced IT managers, qualified by their membership in IBSMA (the International Business Software Managers Association, a division of ECP) or subscription to an ECPweb publication. While many organizations do not yet have an ITIL program, most of those responding had employees dedicated to the study and potential implementation of one.

Because the data collected comes from self-assessments, the range of answers inevitably reflects the range of temperaments of the individuals responding — e.g., some may tend to be harsh critics, while others are more forgiving; still others are optimistic or pessimistic. While the results are based on subjective judgments, we believe that the survey accurately reflects the diversity of perceptions found in practice.

### Categories and Maturity Levels

As a major change in organizational culture, a transition to ITIL can be influenced by several factors: Does the company have adequate infrastructure and commitment from management? Is its service desk up to the task, and do IT staff already have defined roles and responsibilities? A system for measuring ITIL performance is also important.

#### Titles of Respondents

- > Applications Specialist
- > Asset and Configuration Owner
- > IT Asset Manager
- > Director of Infrastructure
- > CIO
- > Desktop Integration Engineer
- > Director of IT Services
- > Global IT Services Project Manager
- > IT Director
- > IT Manager
- > Manager of Enterprise Operations
- > Manager of Customer Support
- > Project Manager
- > Purchasing Manager
- > Software Configuration Manager
- > Sr. Programmer/Analyst
- > Systems Engineer
- > Technology Architect
- > Vice President

In our survey, each respondent answered a series of questions and we tallied scores in seven categories, as well as individual and composite ratings, in order to gauge development of an ITIL program. Because ITIL is relatively new to North America, there is no definitive information proving that performance in one category leads to a more successful implementation, e.g., that culture, for instance, is more important than infrastructure. Consequently, in analyzing results, we assigned equal weight to categories and individual answers.

**Categories:**

**Management commitment to the service desk and ITIL program:** management support, as evidenced by specific actions, for successful implementation of ITIL.

**Service desk activities and process capability:** includes tasks and work, as well as processes and procedures used to deliver services.

**Environment, standards and infrastructure:** the physical plant and equipment used to support the organization’s business.

**Roles, skills and responsibilities:** the personnel required to support the organization’s business and the many diverse jobs, skills and knowledge required to successfully implement ITIL.

**Measurement and performance:** a set of metrics or criteria for capturing information to evaluate the effectiveness of defined processes or tasks; or other measures of success or outcomes.

**Quality assurance:** a function that monitors how well the organization adheres to the defined process, roles and responsibilities. IT reports monitoring results to senior management.

**Culture:** the predominant attitudes and behavior of a group or organization and how it adapts to change. An organization’s culture is the structure that supports ITIL processes. It can be described by its motivations (profit or nonprofit), pace (fast or lethargic), adaptability (flexible or bureaucratic), communication style (forthright or obscure) or competitive nature (leader or laggard).

Survey scores were divided into five equal ranges, which we describe below, providing a basic ranking of maturity or development levels. As expected, few firms scored at the upper end of the combined range, and the majority scored around the low end.

**The Ranges:**

**Nascent:** Funding is limited, but ITIL is discussed and personnel are researching and developing a program. ITIL is championed by management and a business case exists.

**Formulating:** ITIL training is underway and roles are being filled. Significant investment has been made and funding is available.

**Launching:** An ITIL program is underway. Techniques and practices are in use or being phased in. Funding is established.

**Developing:** An ITIL program is being fine-tuned. The service desk is operational. Some results are measured and used to target areas for improvement.

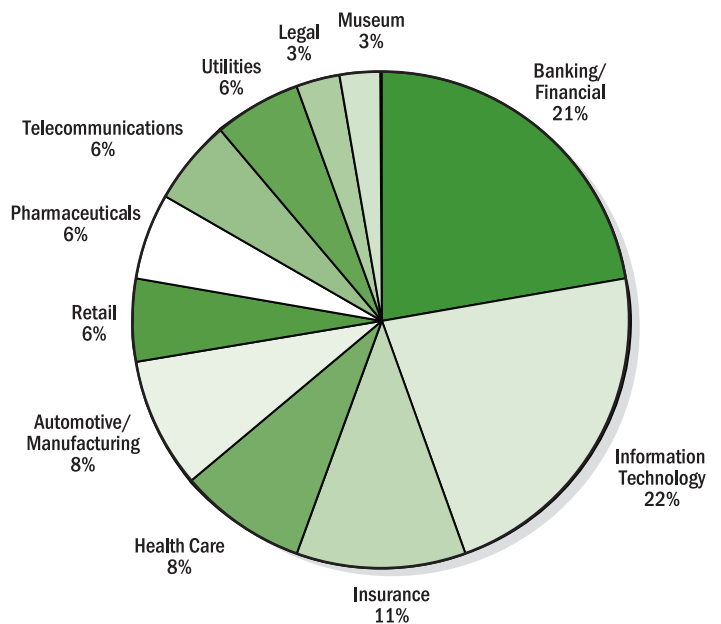
**Fluent:** The ITIL program is having an impact and has been fine-tuned in some areas. The firm is formulating a program for measuring results.

Across the categories listed above, the highest scores were recorded consistently for management commitment. The lowest were recorded in roles, skills and responsibilities and in measurement and performance. ECP believes this demonstrates that IT managers in these companies have identified a need for ITIL and have initiated work to implement the framework. At the same time, their programs are still developing skills and expertise, so they have not yet begun trying to measure effectiveness. Overall, we expect scores to increase over time, as organizations’ programs develop and mature and the firms move to new developmental milestones.

Although ECP subscribers and members reflect a global audience, most of the respondents to this survey (96 percent) are based in the United States. Our survey data predominantly reflect the attitudes of North American firms, and a wide range of industries including public and private businesses and government. (See Figure 1.)

**Results**

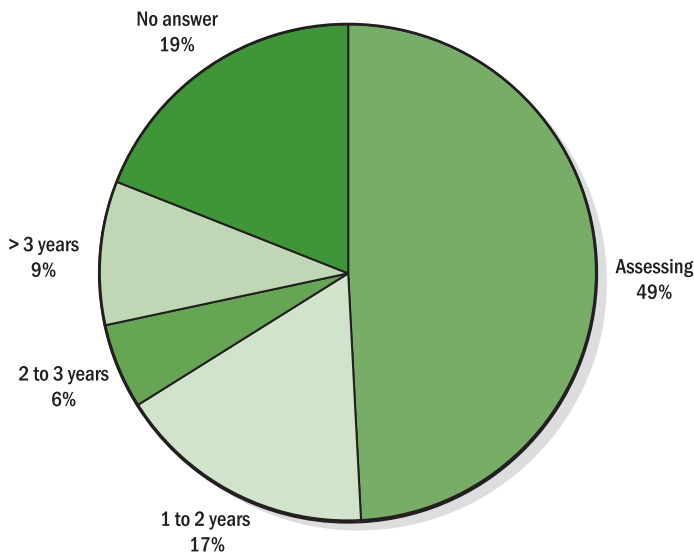
Figure 1: Industries Represented Among Respondents



**Age of the Program**

Respondents were asked about the status of their organization’s ITIL program. Most said they were still assessing how to proceed, or were in the early stages. “No program in place” outnumbered all the firms with programs in place, regardless of length. This mirrors what we find in practice – most organizations are in the assessment phase and few have progressed to the nascent phase.

Figure 2: Age of ITIL Program



**Why ITIL?**

Respondents were asked to report on why their firm was implementing an ITIL program. They were given an open-ended question and allowed to enter up to three objectives. A wide range of responses emerged. Respondents wanted to improve and standardize processes and internal organization, but answers often involved objectives beyond the IT department; for example, respondents cited a desire to “align IT with business units” and “run IT as a business.”

Following “process improvement,” the responses “improved customer satisfaction,” “lower costs” and “software compliance” were virtually tied as the second-most commonly cited. It is interesting to note, however, that only one respondent listed lower costs as the number one objective for the ITIL program. Within the three second-place responses, improved customer satisfaction was most often listed as the first objective, and cost reduction was almost always listed as a second or third objective. Certification against ISO 20000 was mentioned only once and does not appear to influence adoption of ITIL.

The responses to this survey mirror other ECP surveys of IT asset and software management, where cost reduction and compliance are always cited as two of the top three reasons to undertake or continue programs of this type.

**Costs and Savings**

Respondents were asked to estimate the annual costs of implementing and/or operating an ITIL program over the next three years. The average amounts were as follows:

Figure 3: Program Costs

Software	\$450,000
Hardware	\$375,000
Internal Staff	\$500,000
External Consultants	\$250,000
Training	\$70,000
<b>Total</b>	<b>\$1,645,000</b>

Respondents’ predictions of annual savings from implementation of an ITIL program averaged \$1.9 million. In a separate question, respondents indicated that they expected to save on average 10 percent of their IT budgets from such implementation. Testing this data against other responses shows irregularities (i.e., comparing budget vs. predicted costs, comparing expected savings in dollars vs. percentage of reported budget). We lack adequate data to predict with accuracy or draw significant conclusions about costs and return on investment for ITIL. Nevertheless, this study indicates that early-stage adopters expect about a 15 percent return. The responses indicate sustained investment in ITIL, and we expect many organizations preparing to begin their programs to move to nascent and formulating stages in the next 12 to 18 months.

**Management Reporting Levels**

More than 75 percent of respondents indicated that their programs reported to the executive level or higher, a strong indication of management support for ITIL programs at U.S. and Canadian firms. This recalls our earlier studies of IT asset and software management programs, in which reporting level appeared to strongly indicate commitment to the program. The rate of those highly committed to ITAM jumps to 80 percent and for SAM to 90 percent when the functions report to the CIO or executive levels. We predict that future surveys will show a similar level of commitment to ITIL programs that report to higher-level management, and committed organizations will have higher ratings on our maturity scale. (See Figure 4.)

**Program Status**

Our survey asked if there was a senior manager accountable for the ITIL initiative’s success or failure and whether funding had been budgeted specifically for ITIL implementation. The first question measures management’s commitment, a prerequisite for beginning an ITIL program. The results were mixed, and the highest (10) and lowest scores (0), indicated by 23.1 percent and 21.2 percent, respectively, reveal varying levels of support. The mixed ratings indicate the majority of organizations are evaluating how to proceed, though most respondents seem to consider assessing their options to be the start of an ITIL program.

Figure 4. Management Reporting Level

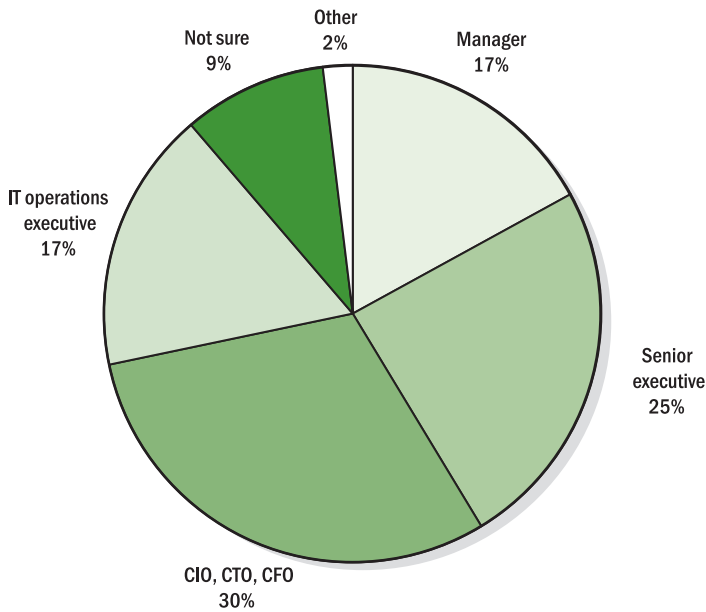


Figure 5: Ratings on Senior-level Management Accountability

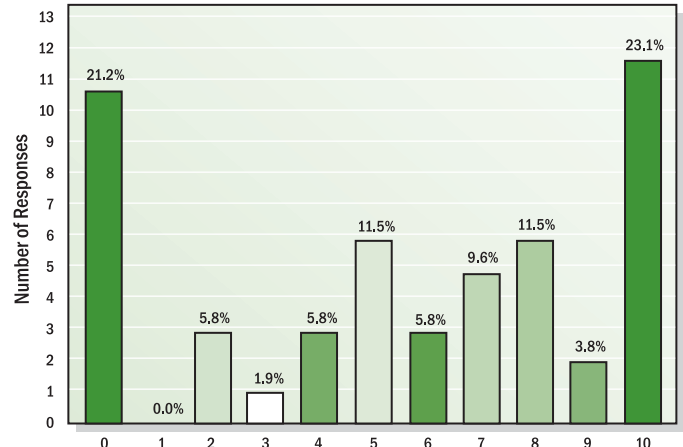
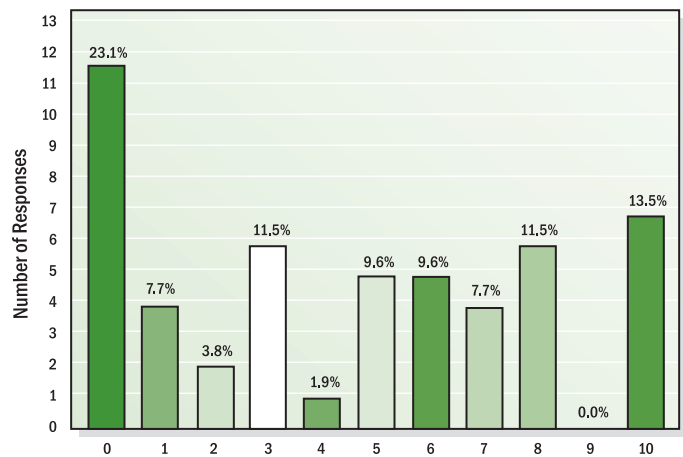


Figure 6: Ratings on Funding Budgeted for ITIL Implementation



Ratings on ITIL-program funding were typical of programs early in the development cycle. Some 55 percent (ratings of 0 to 5) of organizations reported funding ranging from no money up to some money and 45 percent (ratings of 5 to 10) reported having some budget up to fully funded programs. The variability in management commitment and funding seems to reflect these programs' newness. As ratings on commitment increase, we expect to see a corresponding increase in funding levels. (See Figures 5 and 6.)

**ITIL Program Maturity Levels**

Each responding firm was assigned a maturity score based on a tally of all its responses. The array of scores was divided into five developmental or maturity levels (nascent, formulating, launching, developing and fluent). The greatest number scored in the nascent phase, with the highest concentration grouped at the lower end of the range. Only a few placed in the developmental or fluent phase. We removed incomplete responses (e.g., those that did not answer every question in the ranking sections), though the scores are included and tabulated with all other results. (See Figure 7.)

Figure 8 plots cumulative scores against ITIL program length, revealing several interesting details. We observed that scores tend to be higher the longer a program has been established, although not in a straight line (scores are grouped by program length). Secondly, the highest scores correspond to firms with programs less than two years old on average. Many factors affect an ITIL program's success, and younger programs with

higher scores indicate that programs can take hold more quickly at some organizations, or that a program's focus may lend itself to greater success early on (e.g., service level agreements may be easier to implement than a CMDB). ITIL implementations vary a great deal, and there is no prescribed order for introducing processes. Results are subjective, e.g., higher scores may reflect the respondent's enthusiasm more than the program's maturity.

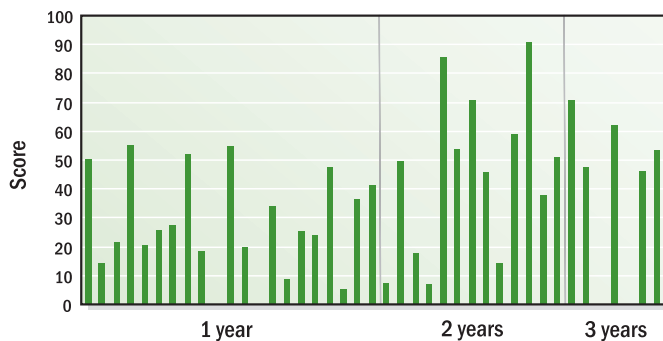
**ITIL Tools**

The survey asked which tools the service desk used to support the IT service management program. In Figures 9 and 10, we plotted data indicating the number of firms using each

Figure 7: ITIL Program Maturity Levels



Figure 8: How old is the ITIL program?



category of tools. Some 80 percent reported using incident and call tracking tools. Remote control of desktops and software distribution were cited by some 78 percent. The majority of respondents reported having active service or help desk functions with some online facility for entry of service requests. The varying level of automation suggests, however, that inventory and asset management and root-cause analysis are not integrated into the ITIL program. Comparing the high number of respondents having tools for software distribution and remote control of the desktop with the low number offering software via a centralized catalog suggests a more reactive organization and a low maturity level for software asset management. This also suggests the ITIL program does not include change management or a fully functioning CMDB. Change management and the CMDB typically go hand-in-hand, and because of complexity, are usually later-stage processes.

**Highest Rankings**

The highest ranked questions came early in the survey, under the category “management commitment to the service desk and ITIL program.” The strong ratings solidly indicate that management had established the business need for ITIL and set out the program vision. Eighty percent said the business need for their service desk was at least partially established

and understood (a rating of 5 or more) and 36 percent rated their programs at 10, indicating the business need was firmly established. (See Figure 11.)

Figure 12 shows ratings on whether senior management perceived the service desk as a strategic function. More than 80 percent said the service desk was at least partially perceived as strategic (a rating of 5 or more), and 34 percent rated it 8 or more.

ITIL does not prescribe an order for implementing IT service management processes, nor does it define prerequisite processes. However, in practice, they do exist and, for example, configuration and change management require at least a rudimentary CMDB, and service level management requires a list of incidents and the ability to track calls and time to resolution. In this survey, every respondent answered questions concerning the service desk, indicating the existence and, most likely, the importance of the service desk to the ITIL program.

**Lowest Rankings**

Questions pertaining to quality assurance processes (QA) and reporting on the value of the program produced the lowest ratings. Of course, you cannot measure what you are not monitoring, nor can you measure improvement without a baseline. Of the organizations having an ITIL program, 53.3 percent said

Figure 9: Which tools does your service desk use?

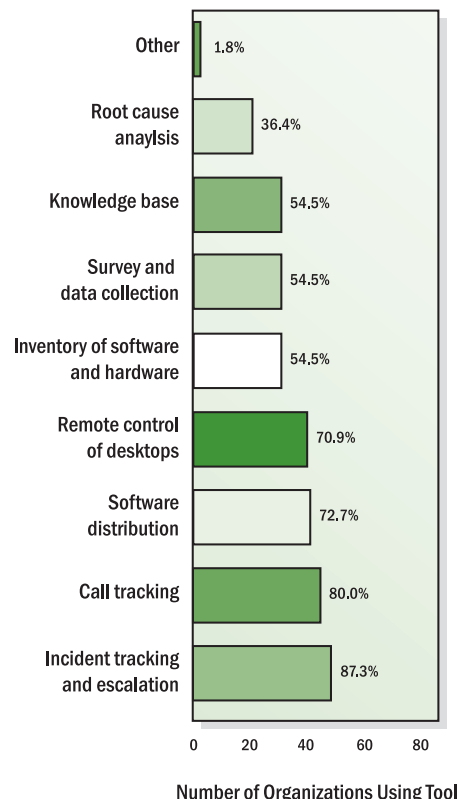


Figure 10: Which automated tools can end users access to resolve IT issues?

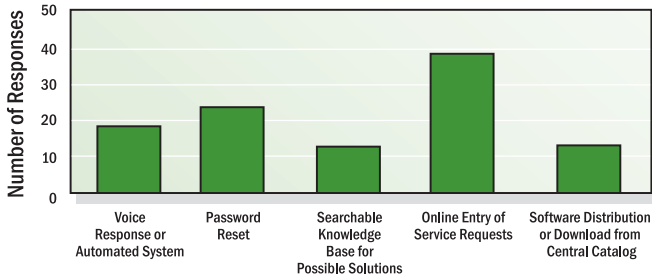


Figure 11: How clearly is the business need for a service desk established and understood?

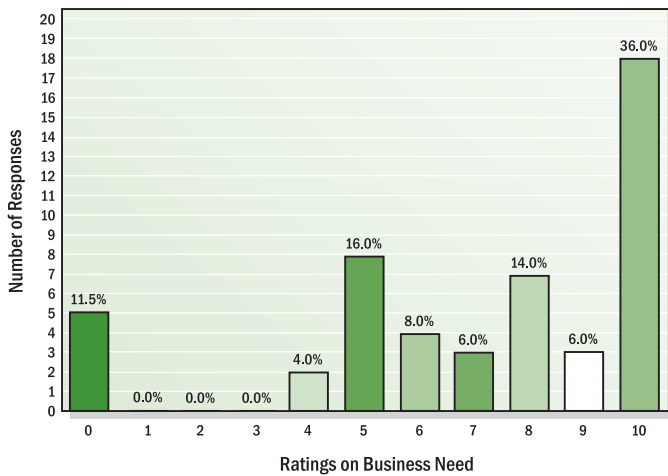


Figure 12: To what extent is the service desk perceived as a strategic function by senior management?

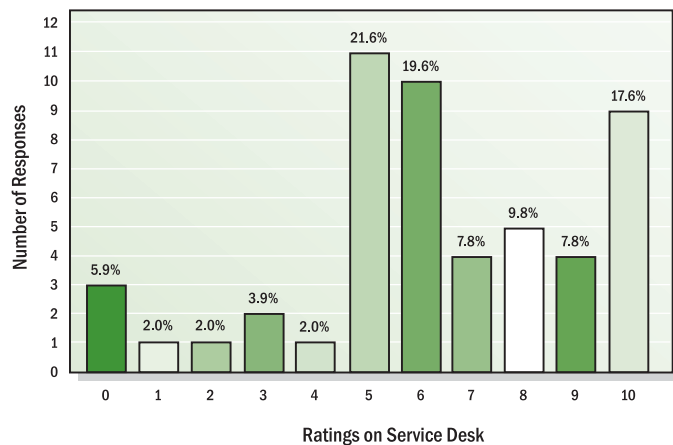
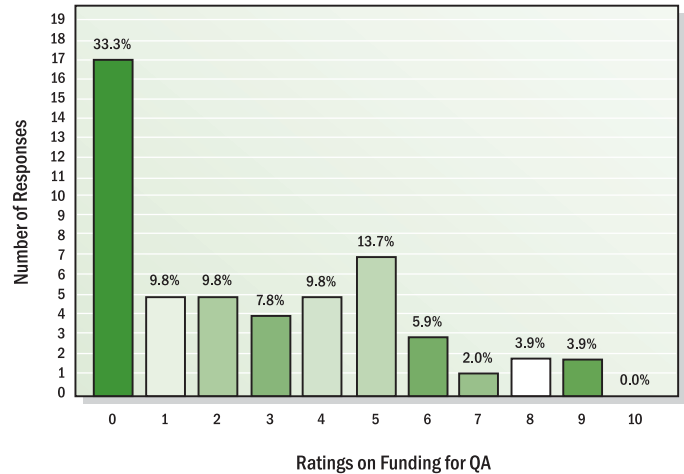


Figure 13: How sufficient is funding for the ITIL quality assurance program?



they had established a baseline for measurement and 44.7 percent had not. Thirty-three percent indicated there was no funding for QA (a rating of 0), and more than 70 percent rated funding at 5 or lower (moderate to none). It seems clear that because ITIL programs are in the early stages of development, the QA process has yet to be established. Questions concerning application of the ITIL program data and value of the program (i.e., staff allocation, surveys or user satisfaction, workload mix, problem resolution and return on investment) all rated 5 or lower (ranging from “some value” to “no value” or “process not in place”) by a majority of the respondents. (See Figure 13.)

### Conclusion

ITIL is on the landscape for a large number of U.S. and Canadian firms. Many perceive benefits of implementing a program, although most are still assessing how to proceed. The majority of firms with active programs (most organizations in the assessment phase consider their programs to be active) fall into the nascent and formulating stages of ITIL process maturity.

Strong ratings on management commitment are a prerequisite for funding ITIL programs, and the pattern here is similar to what we’ve seen in IT asset and software management programs. It seems likely that funding will increase with management commitment and as results begin to emerge from existing efforts. The challenge for IT managers will be to keep executives informed and to demonstrate value for their investment. In the long run, success and improvement will be difficult to demonstrate if quality assurance and performance metrics are not in place and there are no baseline measurements.

ITIL programs, at least for U.S. and Canadian firms, are motivated by all the usual program drivers: cost savings, regulatory compliance and improving the business value of IT services. European IT managers are just as likely to invest in ITIL for the same reasons, plus you're likely to hear the manager justify a program on the claim "That's the way it's done." It's unlikely you'll hear similar claims from a U.S. firm.

Our survey didn't ask about CMDBs and other tools often associated with ITIL and IT service management (i.e., workflow design and processing, resource monitors or auto-discovery tools), nor did the respondents offer much in the way of comments on tools. With few exceptions, there does not seem to be much integration between standard help desk functions and IT asset and software management programs, further indicating that most organizations are unclear on how to proceed with ITIL. This uncertainty is likely to be a factor influencing the decision to integrate IT service management with other disciplines. If history is a reliable predictor of future behavior, tool vendors are likely to see an uptick in business for supporting infrastructure tools once IT managers decide to embrace ITIL.

For North American IT managers, ITIL is exploding and most certainly here to stay. The U.S. market is huge and adoption of ITIL by a moderate number of U.S.-based companies will significantly advance IT service management practices worldwide. As programs mature and are documented, research will reveal details on necessary investment and returns. The real impact of ITIL in North America is sure to become clearer in the next few years.

**Steven Russman** and **Bill Winters** prepared this report.

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### **In Their Own Words: Survey Respondents Speak Out**

*“We have implemented a number of ITIL processes. While it has been somewhat of a priority for us, we have absorbed the costs and resource allocations within all the areas of IT. We seem to look at it more as the cost of doing business. — Supervisor of systems support, energy services*

*Our program to centralize ITIL processes enterprise-wide has only recently begun. We have formalized a competency center, assigned process-ownership teams and documented most of the service-support processes. We have begun our metrics definition and deployment. We expect two and a half more years of work to complete our first run through all the foundational ITIL processes. — Vice president, financial services*

*We looked at ITIL. It was all the rage for about three months. Then we stopped talking about it. I haven't even heard the word spoken aloud for nine months or so. — Senior analyst, health care*

*We are in the early stages of implementing and our goal is to move up in the maturity model by year end. The groundwork is laid, software purchased and staff is just starting to be assigned to the different phases. — Director, health-care insurer*

*We really don't have ITIL set up in our organization, but we do have a software asset management office which has realized savings, has the support of executive management and reports regularly to all IT management. — Senior associate, biotechnology*

*We are in the early evaluation/investigation phases and are trying to understand both the extent and the value of ITSM, both for our own company and for our clients. — Product manager, software publisher*

*There is a lack of knowledge and information at this time. I have started a grass-roots effort to educate internally and it has been received well. — Software configuration manager, IT service provider*

*We do not have an official ITIL program in place, but we do have many processes that are patterned after ITIL. The goal is to demonstrate practical value, then to introduce a formal program. The work up front will help pave the way for formal funding. — Software asset manager, financial services*

*Our company reports to a CFO, so money is the focus, not process improvement. — Manager of infrastructure operations, pharmaceutical manufacturing*