

**SAMPLE CHAPTER!**  
Service Catalog Tools

# Defining IT Success Through The Service Catalog:

## A PRACTICAL GUIDE

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# 7

## Service Catalog Tools

Throughout this book, we have emphasized the use of the Service Catalog as a best practice to help IT groups manage customer relationships. But how does IT manage the Service Catalog?

This is the point where tools come in. To manage the kind of operational Service Catalog we have been describing in this book, a tool will be needed. Many people start by thinking of the catalog as a static inventory of applications, then a brochure on a portal or a self-service tool web page. Later, they realize it needs to serve as an IT accounting system, a workflow tool, a service level reporting tool, a relationship management tool, even as a product lifecycle manager.

It's a tall order, but the Service Catalog serves all these needs and more. It also serves the IT Service Owners, Product Manager, Service Level Managers, Relationship Manager, service fulfilment and access management groups. But unlike typical IT service management tools, it also has to serve the needs of the business executives and the employees of the organization first and foremost—this makes this tool difficult for IT people to understand. The needs of the business are above the needs of IT.

Here are two examples of a Service Catalog tool helping resolve common dilemmas faced when designing services for the Service Request Catalog.

### **Real-world Example:**

#### **How Granular Should My Service Request Definitions Get?**

Large Fortune 500 companies have more than 1000 and some are approaching 1500 unique service requests. Where to draw the line for different service requests is one of the challenges with which Service Catalog tools can help. Re-usable or "atomic" services are useful when creating service packages. Having a tool that let's you re-use components and also provides component inheritance means the catalog is feasible to maintain. Without these features, IT product managers fall back on one long form for all software. This use of one form makes it tough to use the catalog effectively, but also makes it tough to find out what's selling, what should be retired, or to build functional packages from such large service definitions.

**Real-world Example:**

**Who's Entitled?**

The question: what should be in the catalog? The answer: everything. A common complaint we get is IT professionals telling us that they cannot let users see those services or they'll order them! This point is where entitlement management is so crucial to allow the IT Product Manager to decide which services go to which channels and which packages go to which distribution channel. For example: the 6oz email goes to sales, but the jumbo email should go to marketing and the deluxe email should go to directors and above, while the standard European email (which is delivered by an MSP) should only go to our European subsidiaries. We have one master catalog, made up of common components but our packages can be quite different. This type of process needs a tool that is designed for this type of job.

## 7.1 The IT Front Office – An ITIL V3 Tool Perspective

Earlier we discussed the IT front office. Here we want to look at it from a purely ITIL V3 process perspective. In the following figure, we identify how ITIL V3 processes relate to the organization :

- On top, we have the business organization and its different operating units which execute various business processes
- These processes are dependent on a variety of IT business services

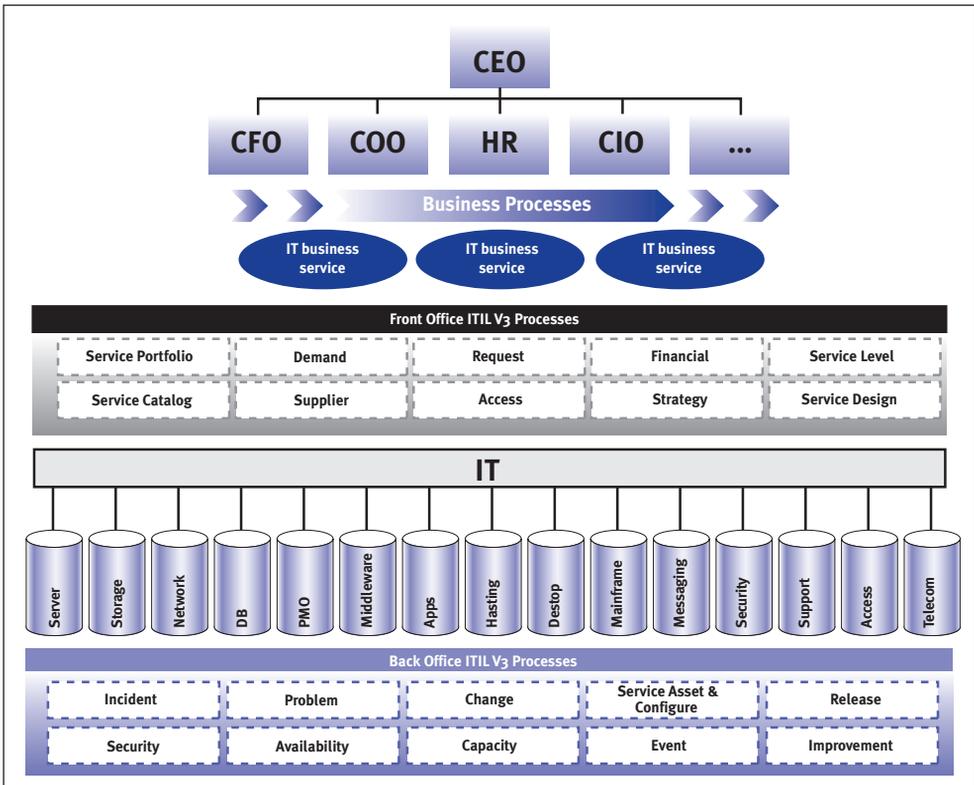


Figure 7.1 An ITIL V3 Perspective

- These processes are defined and managed by the customer-facing ITIL V3 processes
- These customer-facing processes are the face of IT
- These customer-facing processes in turn direct the ITIL V3 back office processes
- The back office processes coordinate service delivery by the different IT silos

ITIL V3 brings a new set of customer-centered, front office processes which require an integrated data and process model distinct from the back office. These front office processes need to be supported by a new set of capabilities, functions, roles and architecture centered on and supported by the customer facing Service Catalog. These processes are complementary to the back office.

We have assembled below from our collective know-how lists of questions that could be useful for the reader when developing a Request for Information or Proposal (RFI and RFP – another service that IT provides). The list goes beyond the function of publishing IT services and also looks at the integration and supporting requirements to enable other processes such as Portfolio, Financial, Demand and Request Management. We have put the lists into categories you need to support specific process ITIL V3 front office processes, but there's a lot of overlap between them. For example requests drive costs which drive the portfolio, so some requirements repeat. The best way to think of these lists is as different parts of a whole.

## Service Catalog & Design

1. Does the tool support multiple views into the Service Catalog including: (a) a business customer view for the business relationship, Financial and Demand Management; (b) a user view for self-service and status updates of service requests; and (c) an IT view for Service Design, Service Level Management and Request Fulfilment?
2. Does the Service Catalog tool support the creation and publication of service offerings with: (a) descriptions of service offering features, functions and benefits in business terms; (b) supported service levels and available service level options; (c) pricing and costing, defined dynamically with reference to service levels selected; (d) included service components; and (e) user-defined attributes?
3. Does the tool support the combination of service components into service component bundles (e.g.: a laptop computer bundle that includes software applications, email, network connectivity and remote access as part of the workplace service offering)?
4. Does the tool support the creation and publication of service components that may include both professional services (e.g.: database management) and technical services (e.g.: class-one application service)?

5. In the service component definitions meant for users, does the tool support the ability to include: (a) service request forms; (b) request fulfilment workflows?
6. Does the tool provide a Service Catalog Management and service design capability that enables subject matter experts or business analyst resources (i.e.: non-developers) to configure and maintain the Service Catalog including the details of each service offering and service component?
7. Does the tool support distributed, role-based Service Catalog Management including service design and maintenance, enabling different aspects of the Service Catalog to be configured and maintained by different roles (e.g.: Email Product Manager role and Business Relationship manager role?)
8. Does the tool provide dictionaries of standard, re-usable service components such as “atomic” elements that make it easier to design new service offerings?
9. Does the tool allow for mass editing of service components for managing the complexity and large-scale nature of enterprise-wide Service Catalog programs?
10. Does the tool provide the ability to display the Service Catalog via a web interface, leveraging intuitive service category drill down and search functionality to enable users of the Service Catalog to easily locate service offerings and/or service components?
11. Does the tool support WYSIWIG publishing (no HTML expertise required) for the descriptions, images, service levels, and other attributes of service offerings and service components in the Service Catalog?
12. Does the tool support keywords for search – including common misspellings or synonyms for service components in the Service Catalog?
13. Does the tool provide the ability to configure and display the Service Catalog in multiple languages?
14. Does the tool provide the ability to model the organizational structure of the business units served by the Service Catalog, including hierarchical business unit structures and geographies?
15. Does the tool provide the ability to define and enforce governance processes related to accessing the Service Catalog (e.g.: restrictions on access to view and/or request services in the Service Catalog)?

16. Does the tool provide the ability to define and enforce authorization processes related to orders placed against service offerings and/or service components in the Service Catalog (e.g.: departmental, financial and service team reviews and approvals)?
17. Does the tool provide the ability to define and model key Service Strategy and Service Design roles, functions and activities, such as Service Catalog Manager, Service Designer, Service Team Manager, etc.?
18. Does the tool support the initiation, tracking and reporting of key Service Strategy and Service Design processes and activities (e.g.: modify an existing service or generate a Service Improvement Plan)?
19. Will the tool provide the scalability and performance required in order to make it an effective component in an organization's Service Strategy and Service Design structures, potentially serving the requirements of tens or hundreds of thousands of users?
20. Does the tool provide support for single sign on to improve ease-of-access to the Service Catalog?
21. Does the tool provide a means to display the Service Catalog within corporate portal servers?

## **Service Portfolio & Demand**

1. Does the Service Catalog tool provide support for Service Portfolio Management, Financial Management and Demand Management processes?
2. Does the tool enable the creation and publication of all service offerings in the Service Portfolio, including those (a) services under development/consideration, but not released (service pipeline); (b) in production/operation (for the Service Catalog); and retired/discontinued offerings?
3. Does the tool provide an integrated ability to manage the service "lifecycle status" from strategy to design through to transition, operation, improvement and retirement?
4. Does the tool provide the ability to define potential service offerings in the pipeline for evaluation by IT management and business unit customers?
5. Does the tool provide the ability to do detailed price/cost modeling, to determine the cost unit structures for each service offering?

6. Does the tool provide support for breaking down a service price into multiple general ledger or cost center codes (e.g.: allowing IT organizations to account for hardware service components that could be treated as a capital item, versus labor that may be an expense item)?
7. Does the tool provide the ability to optimize the Service Portfolio by tracking and reporting on service offering and service component usage, costs and service level performance?
8. Does the tool provide the ability to define and manage business agreements against the service offerings contained in the Service Catalog?
9. Does the tool provide the ability to forecast consumption relative to key cost drivers and optional service components, as well as agreed to service levels, as specified in the business agreement document for a particular business unit?
10. Does the tool provide an automated console for service transition, enabling the migration of service offerings and service components in the Service Catalog from development, to QA, to staging and to production?
11. Does the tool automatically populate the service components that can be requested in the Service Catalog based on these agreed-upon service offerings and business agreements (e.g.: once a business unit agreement is activated for a workplace service offering that includes Blackberry as an option for a subset of users, the Blackberry appears in the Service Catalog for users that are entitled to that option in that particular business unit)?
12. Does the tool provide the ability to consolidate, track and report on actual consumption, costs, budgets and service level performance for each service offering and their related business agreements?
13. Does the tool provide the ability to generate charge-back data related to service offering and service component consumption (e.g.: based on service requests and other demand data) for users in the business units?
14. Does the tool provide an interface for IT Business Relationship Managers to monitor and detect potential issues such as actual consumption not matching planned consumption and/or actual service level performance not matching planned service level performance including:
  - Descriptions of service offering features, functions and benefits in business terms?
  - Supported service levels and available service level options?
  - Pricing and costing levels related to service levels selected?
  - Included service components and attributes?

15. Does the tool organize services into logical groupings or hierarchical structures that can be used to assemble services in customer and business-relevant packages or offerings?
16. Does the tool support the creation and publication of service components that may include both professional services (e.g.: Database Management, Incident Management) and technical services (e.g.: a business application service)?
17. Does the tool facilitate the ability to publish different levels of the same service (e.g.: bronze, silver, gold levels)?
18. Does the tool facilitate role-based views for the Service Catalog?  
For example:
  - Does it support an “IT View” for Service Design, Service Level Management, and Request Fulfilment?
  - Does it support a “User View” including services that specific users can have based on access entitlement?
  - Does it support a business customer or “Portfolio View” to support planning, relationship, Financial and Demand Management?
19. Does the tool provide the ability to display the Service Catalog via a web interface to enable users of the Service Catalog to easily locate service offerings and/or service components?
20. Does the tool facilitate the management of service states? For example, does it differentiate services in design versus services in production?
21. Does the tool facilitate the ability to provide a view of services associated to specific business functions based on usage or subscription? For example, the ability to build and provide a "My Service Catalog" view.
22. Does the tool support the tracking and publishing of service-related reports based on customer agreements and published service attributes?
23. Does the tool facilitate the customization of reports to a specific audience?
24. Does the tool provide the ability to define key Service Management roles, such as Service Catalog Manager, Service Designer, Service Team Manager, etc. with established levels of rights?
25. Does the tool support distributed, role-based Service Catalog Management – including service design and maintenance, enabling different aspects of the Service Catalog to be configured and maintained by different roles (e.g.: Email Service Manager role and Business Relationship Manager role?)

26. Does the tool facilitate the creation of user-defined business rules and workflow automation in support of review, approval and task routing-based requests against published services in the catalog?
27. Does the tool incorporate a search engine to facilitate the requestor's ability to quickly find services they desire?
28. Does the tool enable the creation and publication of all service offerings in the Service Portfolio, including:
  - Services under development/consideration, but not released (service pipeline)?
  - In production/operation (for the Service Catalog)?
  - Retired/discontinued offerings?
29. Does the tool support the management of a Service Portfolio comprising a Service Pipeline and a Service Catalog? For example, the ability to manage the service “lifecycle status” from strategy to design through to transition, operation, improvement and retirement?
30. Does the Service Portfolio support tracking the status of services throughout the service lifecycle, using statuses such as requirements, defined, analyzed, approved, chartered, designed, developed, built, test, released, operational, retired?
31. Does the tool provide the ability to define potential service offerings in the pipeline for evaluation by IT management and business unit customers?
32. Does the tool provide the ability to optimize the Service Portfolio by tracking and reporting on service offering and service component usage, costs, and service level performance?
33. Does the tool support recording of business-related attributes of services, such as business processes supported, business owners, and business users?
34. Does the tool provide the ability to support the forecast of service consumption relative to key drivers such as number of users, cost elements, and optional service components, as well as agreed service levels?
35. Does the tool support recording of key attributes of services, such as service name, service description, service status, service classification, service warranty level, service metrics?
36. Does the tool support recording of financial attributes of services, such as service cost, service charges, and service revenue?

37. Does the tool support recording of technical aspects of services, such as applications used, IT owners, supporting services, dependent services, and OLAs, contracts and agreements?
38. Does the tool facilitate service planning, demand management and forecasting?

## **Request Fulfilment**

1. Does the tool provide a user view into the Service Catalog for viewing available services and raising service requests?
2. Does the tool have a well-designed web interface, making it easy for users to find services and order from a standard 'menu' of pre-defined service options?
3. Does the tool allow the definition of a Service Catalog containing all customer-facing IT request processes in a single interface? Does this interface support self-service for all IT operations interactions including incidents, changes, access requests, and service requests as well as application development-related requests such as enhancements or new project requests?
4. Does the tool provide the user with the means to browse and search what is available in the Service Catalog in a language that is meaningful to a business person and in a form that is familiar such as e-Commerce sites?
5. Does the tool allow the user to submit service requests, get detailed request status visibility and cancel service orders that are no longer necessary?
6. Is the self-service enabled through a web interface that is familiar to users and thus not requiring any user training?
7. Does the tool provide support for requesting non-IT services and bundled services that may include non-IT service components (e.g.: a new employee on-boarding service that includes HR-related tasks or facilities-related tasks)?
8. Does the tool provide entitlement-based and individual views into the Service Catalog so that each user only sees the services in the Service Catalog that he/she is entitled to see (e.g.: a data entry employee does not see the Blackberry service; an IT employee sees a range of technical services that a business user doesn't see)?
9. Does the tool provide location-based, role-based, business-unit views, and group-based views into the Service Catalog so that each user sees the service options and variations that meet their needs (e.g.: an employee in Bangalore, India sees different service options, service levels, pricing, and suppliers than an employee in London or Atlanta)?

10. Does the tool provide a means to integrate with enterprise directory systems (e.g., LDAP, Active Director) in real-time, pulling the most recent information for each person, the entitlements, the roles, the physical location in the organization and the supervisory chain for service request approvals?
11. Does the tool provide eCommerce features such as a shopping basket, category management, multi-channel management (which user gets to see what services), and self-service configuration to create a “shopping experience” for users?
12. Does the tool provide email notifications to users and other interested parties as the Request Fulfilment progresses?
13. Does the tool allow users (e.g.: administrative personnel) the ability to request services on behalf of other users?
14. Does the tool provide authorization management, including support for multiple authorization chains that can be automatically invoked without user intervention depending on the service, service delivery group, organizational unit or financials?
15. Does the tool provide libraries of pre-packaged IT service request content, including definitions and pre-packaged images or icons for services?
16. Does the tool provide installation tools for pre-packaged service request content, with preview and mass editing ability?
17. Does the tool provide an embedded workflow tool that can be used by a non-expert without programming skills or workflow expertise?
18. Does the tool provide an ability to manage Request Fulfilment workflows that happen sequentially, in parallel or based on condition?
19. Does the tool support ad-hoc workflow changes (i.e.: support for a fulfilment person to create a workflow step on the fly without programming)?
20. Does the tool allow for automatic, dynamic and or manual assignment and re-assignment of work to people or queues?
21. Does the tool provide a means for service delivery personnel to search for, view, check-out and perform Request Fulfilment tasks?
22. Does the tool provide task instructions and tips for each service request to ensure the efficiency and repeatability of Request Fulfilment activities?

23. Does the tool provide support for the coordination of back-end fulfilment across multiple other tools and processes (e.g.: Access Management process for access requests, Portfolio Management system for project or enhancement requests and non-IT systems for requests such as facilities work orders)?
24. Does the tool integrate the Request Fulfilment process with non-ITIL processes such as procurement, telecom provisioning, HR processes, etc.?
25. Does the tool provide organizational modeling functionality to manage Request Fulfilment across multiple business units, service teams, suppliers, geographies, languages, etc.?
26. Does the tool allow for delegating complete or Request Fulfilment activities directly to other back-end tools via integration, without requiring integration to the service desk as a clearing house (e.g.: software requests can be automatically provisioned after authorization without requiring an additional fulfilment step integrated with the service desk)?
27. Does the tool facilitate the creation, modification, fulfilment and closure of service request records?
28. Does the tool provide the requestor with an entitlement-based view of the services he/she is authorized to request?
29. Does the tool allow the user to submit service requests, get detailed request status visibility and cancel service orders that are no longer necessary?
30. Does the tool automate the rapid categorization (e.g.: provisioning vs. request for information), classification and recording of service requests?
31. Does the tool facilitate customizable thresholds for automated escalation?
32. Does the tool enable priority, impact and urgency indicators to be assigned to service request records?
33. Does the tool support the automated routing (alerting) to and coordination of service requests among selected support staff or groups? For example, the Service Desk, Network Operations, Telecom, etc.
34. Does the tool facilitate complex request workflows through sequential and parallel tasking?
35. Does the tool facilitate the analysis of service requests to identify trends?

36. Is the tool facilitating the generation of reports on outstanding (incomplete) service requests?
37. Can the tool link to feeds from other tools and departments, and provide information to other tools and departments (e.g.: HR, facilities)?
38. Does the tool facilitate the creation of business rules for specific requests or groups of requests in order to automate the process, tasks, notifications, etc.?
39. Does the tool facilitate the tracking of service requests against established SLA targets?
40. Does the tool measure ongoing demands for specific services and requests for those services?
41. Does the tool facilitate billing or recover for services rendered (i.e.: does it link to a financial tool or module)?
42. Can specific requests be created such that costing and billing is automated when they are fulfilled?
43. Can the tool automate the recording and reporting of the ongoing costs of Request Fulfilment against particular cost centers, etc.?

## **Financial Management**

1. Does the tool provide the ability to do detailed price/cost modeling, to determine the cost unit structures for service offerings published in the Service Catalog?
2. Does the tool tie IT services in the Service Catalog back to general ledger accounts or costs centers? For example, support for breaking down a service price into multiple general ledger or cost center codes.
3. Does the tool support different cost models based on varying service levels for the services published in the Service Catalog?
4. Does the tool support different cost models based on varying service levels for the services published in the Service Catalog?
5. Does the tool distinguish and differentiate between service cost and service price? For example, does it allow you to set a price for the service based on demand metrics, but track separately the actual cost to provide the service?

6. Does the tool support a hierarchical service-based costing model? For example, a customer-facing application or user services is understood to contain an allocation of supporting IT infrastructure/technical service costs such as network or storage-based on a defined unit or driver?
7. Does the tool integrate with the general ledger system, HR time tracking system and other internal tools for tracking and managing and reporting on IT spending?
8. Does the tool support the aggregation of IT service consumption based on organizational relationships? For example, distributed, departmental or geographical business unit service consumption is reported based on business unit relationships.
9. Does the tool support the creation of customized reports related to service based costing, consumption and recovery?
10. Does the tool support business planning in support of the annual budgeting processes?
11. Does the tool support Demand Management and scenario modeling in terms of potential business changes in consumption or service costs?

## **Continual Service Improvement**

1. Does the tool provide out-of-the-box reports specific to Service Catalog Management as well as analytical tools and dashboards to assist in managing the operating state as well as drive continual improvement?
2. Does the tool include a pre-built data warehouse and ETL (extract/transform/load) functionality for analytics related specifically to the Service Catalog?
3. Does the tool provide out-of-the-box reports specific to Request Fulfilment as well as analytical tools and dashboards to assist in managing the operating state of service requests as well as to drive continual improvement?
4. Does the tool enable Request Fulfilment reporting on all fields and specific form data captured during the service request?
5. Does the tool facilitate creation of detailed custom reports relevant to the information captured in specific Service Catalog areas (e.g.: easy-to-create reports for desktop computing services that capture different information than the reports for employee onboard services)?

Sample service level agreement 2 (SLM- SLA example _.pdf )	Sample SLA document, which can be used to provide detail related to the delivery of service offerings, IT services and/or IT systems
Operating level agreement template (OLA template.pdf )	Template for documenting an operating level agreement
Sample operating level agreement (OLA sample.pdf )	Sample OLA document, which can be used to provide detail related to the delivery of an SLA