



DEVELOPING AN IT SERVICE MANAGEMENT TRAINING STRATEGY & PLAN

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1 EXECUTIVE OVERVIEW

Developing and implementing an overall IT Service Management (ITSM) training strategy and plan is critical to any ITSM improvement program and needs to be considered during the initial stages of the ITSM Roadmap planning. Providing IT Infrastructure Library (ITIL[®]) and other related training throughout the program lifecycle ensures that all IT employees have a common language and the key stakeholders who will be responsible for developing and executing process activities have the appropriate knowledge and skills to effectively perform their process duties.

During the strategy and design phases of the lifecycle it is important to provide a level of awareness training to the senior management team, as well as in-depth training to the Program Manager, Project Manager and Process Owners.

Before the process design activities begin it is important that the design teams clearly understand the process they are responsible for designing and also understand their role in process design and learn the key steps to process design.

Before the process and tool are deployed there is a requirement to provide specific role-based training and tool training based on the process that was designed and built for your organization.

Throughout the program lifecycle there will be ongoing opportunities to provide different levels of ITIL and other related training as new employees are hired or employees take on a new process role.

One of the keys to a successful ITSM program is to manage the organizational change activities. Implementing new processes will require behavioral changes of the IT staff and managers, and training is a key activity to support the organizational change management activities.

This white paper will help organizations understand the key steps to implementing an ITSM Training Strategy and Plan.



2 MANAGER RESPONSIBILITIES

For effective training to take place, it is important to recognize that multiple managers play a key part in ensuring their employees gain the necessary knowledge and skills from any training course. In this context, ‘managers’ will mean direct report managers, program managers, process owners, and process managers.

All managers will play a role in developing the training and job requirements and identifying skill gaps for each process. This would include the ability to follow the process and utilize any ITSM tool to enable process activities. All managers will also have input in an overall training plan. And last but not least, all managers need to take on the role of being a change agent and providing coaching and mentoring to the employees.

2.1 Before Training Takes Place

Once a decision has been made to send an employee to training, it is important that a discussion take place with the employee before the training in regards to the following:

- Discuss with employees why they are going to training
- Discuss the benefits to the employees as well as how the training will support the organizational strategy, goals and objectives
- Discuss the expectations for what the employees will learn
- Discuss expectations after training has been completed
- Schedule time to check in during training (longer term courses)
- Schedule time to debrief in after the training has been completed
- Make arrangements for the employee’s work to be covered during the training
- Schedule far enough in advance so the employee has time to prepare and make any personal arrangements, especially if the employee has to travel somewhere for the training

Discussing these items help employees understand their role in training, what is expected of them after training and how the training is supporting the organization’s strategy, goals and objectives.

It is a good idea to formalize this process by having the manager and employee sign and date a document that says they discussed the above topics.

2.2 During The Training

For longer term training (three days or longer) it is important to check in with the employee to see how the training is going and to answer any questions that the employee may have in regards to the ongoing training.



2.3 After The Training

It is important to discuss the following items with your employee immediately after the training has been conducted:

- Ask the attendee to explain what was learned during the training and how they will be able to apply the new knowledge and skills on the job
- Set the expectation of how the learning will be used on the job – this could include any behavioral changes
- Provide an opportunity for the attendee to use the newly gained knowledge and skills
- Be prepared to answer attendee questions
- Provide ongoing coaching and mentoring to the attendee

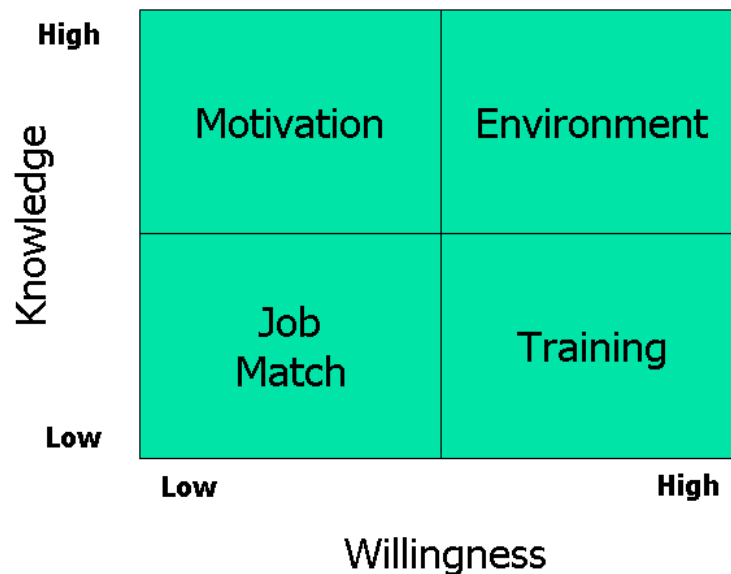
It is a good idea to formalize this process by having the manager and employee sign and date a document that says they discussed the above topics.

3 IS IT ALWAYS A TRAINING ISSUE?

If you have ever sent an employee to training multiple times and yet they still have some performance and/or compliance issues, you have to ask yourself “is it a training issue”?

Using the below chart you have to ask yourself two questions:

1. What is the knowledge level of the individual?
2. What is the willingness of the employee to do the work?



- If you have an employee who has a low level of knowledge and a high willingness then this employee will benefit from training. Typically these people aren't having performance issues but are new to their role. In this case, training is the appropriate course of action
- If you have an employee with a high level knowledge and a low level of willingness, then this is typically a motivational issue that the manager needs to work on with his or her employee. The manager needs to talk with the employee to find out what is important to the employee and identify the key factors that motivate the employee. The manager then owns the responsibility to create an environment for motivation to take place and to remove any de-motivating factors

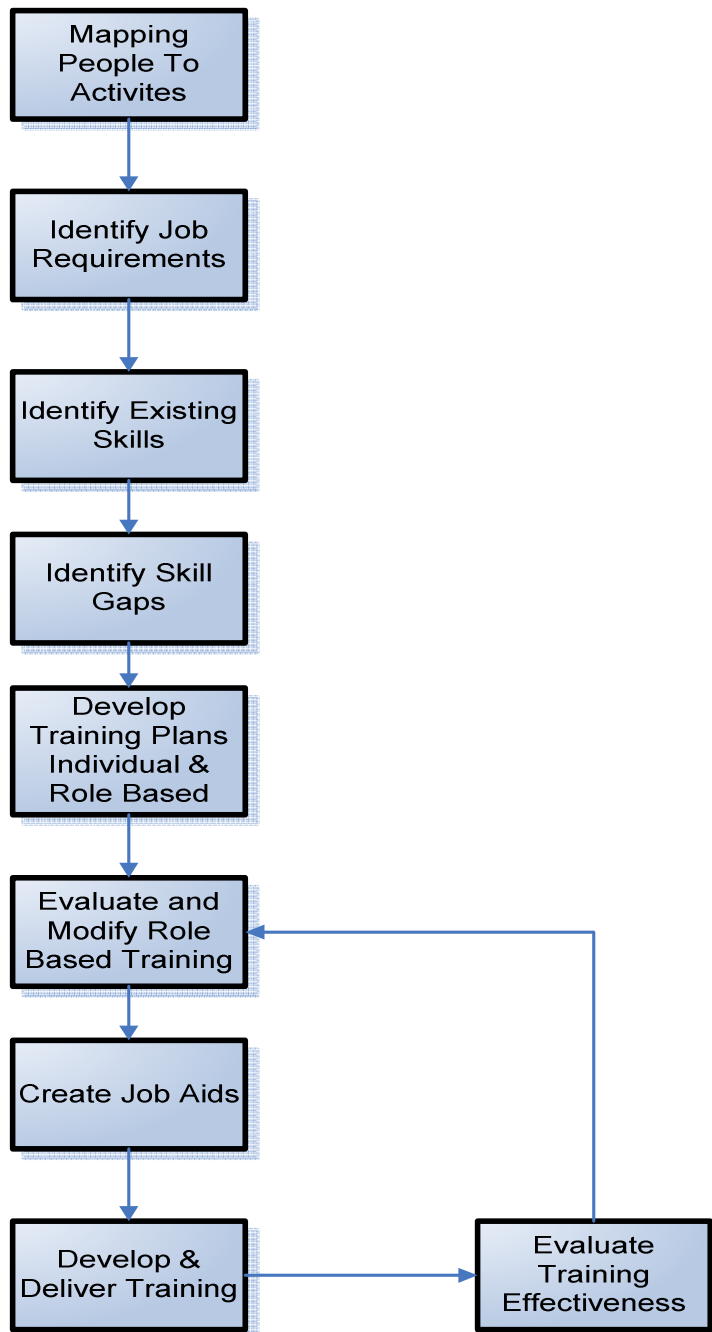


- If the employee has a high level of knowledge and a high willingness to do the job, then this is typically an environmental issue. In other words, there are things going on that are out of the employee's control. These could be conflicting goals, conflicting demands, out of date policies, or an actual work environment that is noisy, cramped, poor lighting, etc. The manager needs to talk with the employee and review work conditions
- If the employee has low knowledge and low willingness, then this could be a poor job match

When you answer the questions for the employee and the closer the answers are to the middle of the quadrant then always look to training as an important activity to help improve the employee's performance.

4 KEY STEPS TO DEVELOPING A TRAINING STRATEGY & PLAN

Below are the key steps to developing an ITSM training strategy and plan. Each one of these steps will be discussed in more detail.





4.1 Mapping People To Process Activities

To gain an understanding of how much process work has been assigned to the individuals within an organization, it is important to map the different process activities back to the individuals. This mapping is different than creating a RACI (Responsible, Accountable, Consulted, and Informed) authority matrix that is documented for each process.

When ITSM processes are implemented within an organization, most employees are responsible for supporting multiple processes. They wear multiple process hats; one moment they may be supporting Incident Management and then a few minutes later performing a Change Management activity.

Conducting a mapping exercise can help an organization understand when they have overloaded an employee and need to distribute some of the process work to one or more other employees or identify when an employee has the capacity to take on additional process roles; however, never forget that unless the employee is 100% dedicated to ITSM activities, they also have functional job responsibilities that need to be taken into account. This mapping exercise also becomes input in the training plan.

There are a couple of different templates that can be used to support the mapping activities. The first template is mapping the actual process activities to the employees within the organization. This template is used to map the process activities that the individuals are responsible for executing. The second template can be used to map the process roles to individuals.

Example Template #1

Functional & Process Activities	Betty	Tom	Susan	Bill
Incident Management				
Incident Logging	X			
Initial Diagnosis	X			
Escalate Incident	X			
Investigation and Diagnosis		X		
Restore and Recover	X	X		
Close Incident Ticket	X			



Functional & Process Activities	Betty	Tom	Susan	Bill
Problem Management				
Define and log a Problem Ticket			X	
Validate or Create Workarounds		X	X	
Perform Root Cause Analysis		X	X	
Close Problem Ticket			X	
Change Management				
Ensure Request for Change is properly filled out				X
Assess Request for Change				X
Approve low risk changes				X
Attend Change Advisory Board meetings		X	X	X
Participate in Change Review		X	X	X
Etc.				

Example Template #2

Functional & Process Activities	John	Karen	Jason	Angie
Availability Process Owner	X			
Availability Manager	X			
Availability Analyst		X		
Capacity Process Owner	X			
Capacity Manager				
Capacity Analyst		X		
Change Process Owner			X	
Change Manager			X	
Change Coordinator				X
CAB Member	X		X	
Etc.				



4.2 Identify Job Requirements

It is important to identify and document the job requirements necessary to perform the process activities. These requirements are often identified during the process design or after the process has been designed, but before the process and tool are deployed into the production environment. This information can be discovered through reviewing the process documentation such as the process workflows, procedures, work instructions and the roles and responsibilities documentation.

It is also recommended that you interview the key stakeholders such as the direct report manager, Process Manager (e.g. Change Manager) and Process Owner to ensure that all job requirements have been identified and documented. This information becomes input for developing the training objectives and training materials.

For training purposes, you may initially want to focus on the top five job requirements for each process role.

One of the keys for managing organizational change is to ensure that the job requirements are formally recognized by Human Resources. It is important to have the process job requirements acknowledged in job descriptions, that these are taken into account when documenting performance plans, and that they become input for performance appraisals.

A good quote to remember is: **What Gets Rewarded Gets Done**

In other words, you want to ensure that the employees are incited to follow the new process and use the ITSM tools appropriately. If employees are rewarded for old behaviors, then this is exactly what the employee will give you. If you want to encourage a new behavior, this requires the organization rewarding employees for the new behavior. Keep in mind that rewards are not always monetary in nature, but can be a simple 'thank you' or some other form of recognition.

4.3 Identify Existing Skills

Another key activity required to develop a training plan is to identify the existing process and tool skills of the employees. This can be accomplished through conducting assessments, audits, observation and interviewing of each employee.

Focus back on the top process job requirements that were previously documented and determine how capable the employees are of performing these tasks.



4.4 Identify Skill Gaps

Once you have documented the process job requirements and identified the existing process skills, then you can identify the skill gaps. It is a good idea to identify the skill gaps at an individual level, at a process roles level such as Local Change Managers, and also within the functional groups. Again, the initial focus should be on the top process job requirements that were previously documented.

Job Requirement	Existing Skills	Gap
Properly categorizing and prioritizing an incident		
Conducting an impact and risk assessment on a change		
Performing Root Cause Analysis		
Etc.		

4.5 Develop Training Plans

If your organization is just starting on its ITSM journey, then your overall training strategy and planning will be around what training is required throughout the program. There will be some initial training requirements for some key stakeholders to understand ITSM and the ITIL framework. This training may be an ITIL Foundation certification course or ITIL Executive Overviews for the senior management team, and possibly even ITIL Overviews for some of the IT Staff. Most organizations try to have at least one member of the ITSM team obtain the ITIL Expert designation. This is important, as they are often viewed as the internal consultant to the ITSM program.

4.5.1 ITSM Program Start Up

Below is an example of a strategy and high level plan of who within an organization should be considered for different ITIL and other value add courses. As an organization is beginning its ITIL journey, it is recommended to identify the Process Owners as soon as possible because they will be valuable in helping define the process integration requirements.

Scheduling of the training should be done in alignment with the program kickoff and initial planning activities.



Course	Staff						
	Senior Executives	Program Manager	Project Manager	Process Owners	Process Managers	Design Team Members	IT Staff (existing and new)
Developing An ITSM Vision & Strategy	X	X		X			
ITIL V3 Foundations		X	X	X	X	X	X
ITIL V3 Foundations Bridging		X	X	X	X	X	X
ITIL Executive Overview	X						
ITIL Overview							X
ITIL Service Manager		X		X			
Managing Organizational Change	X	X		X			

4.5.2 Before The Start Of Process Design & Ongoing

It is important to ensure that the process design team has the proper knowledge level and skills required to design the process. Most organizations will focus on two major types of training for the design team. Some of the training courses provide an ITIL certification, while others are not accredited but are still critical to a successful ITSM program (see chart on page 18).

- How To Define & Implement Processes:** This workshop goes through all the design criteria and provides hands-on experience of how to document key process artifacts. This workshop provides an overview of what the design team will be responsible for designing
- Process-Specific Training:** This can be accomplished in two ways. One way is an ITIL Process Clinic that goes through the program and project information and then focuses on a specific process such as Change Management. With this method, the organization gains access to Pink Elephant’s Change Management documentation. The other option is to provide the Intermediate level of training such as the Release, Control and Validation course. This course would be suitable for those design team members responsible for designing a Release, Change and/or Service Asset and Configuration Management process. As an organization begins to identify key people to fill the process roles, it is also recommended to have them attend one of these types of specific training



Every organization will also need to make decisions on who should attend courses around the Service Lifecycle, such as Service Strategy, Service Design, Service Transition, Service Operation and Continual Service Improvement.

Below is an example table of aligning who should take what courses. From a scheduling perspective, it is best to have the design team go through the training before they begin any design work. Other key stakeholders can go through the training at any time; but, the sooner the better, as this provides them with an understanding of what the key activities are from an ITIL perspective. Training of new employees or employees who have taken on a new process role will also have to be considered for specific ITIL process training and will become a part of the training plan.

Be sure to refer back to your gap analysis to help identify who should take what training.

Course	Staff							
	Senior Executives	Program Manager	Project Manager	Process Owners	Process Managers	Design Team Members	IT Staff	New Staff
ITIL V3 Foundations								X
How To Define & Implement Processes		X		X	X	X		
ITIL Process Clinic		X		X	X	X	X	
Service Strategy				X	X			
Service Design				X	X			
Service Transition				X	X			
Service Operation				X	X			
Continual Service Improvement		X		X	X			
Managing Across the Lifecycle				X	X			
Operational Support & Analysis				X	X	X		X
Release, Control & Validation				X	X	X		X
Service Offerings & Agreements				X	X	X		X
Planning, Protection & Optimization				X	X	X		X
How To Create A CMDB				X	X	X		
How To Develop A Service Catalog				X	X	X		

Course	Staff							
	Senior Executives	Program Manager	Project Manager	Process Owners	Process Managers	Design Team Members	IT Staff	New Staff
How To Conduct Root Cause Analysis				X	X	X		

4.5.3 After Process Design But Before Process & Tool Deployment

Before the actual process and tool deployment into the production environment, it is important that the organization provides training on their newly designed process and the ITSM tool that enables the process activities. There are usually two types of training that will need to be developed and delivered before a process is deployed.

One is a general overview of the process and tool. This is provided to a larger audience that needs to have awareness of the new process and tool, but will not be actively engaged in the process activities.

The other training is more detailed training for those specific roles that are responsible for executing the process activities, such as the Change Initiator, Change Manager, Change Coordinator and the Change Advisory Board Members. This training will be much more detailed, and will get down to the work instruction level and how to utilize the tool.

There are often specialized courses that need to be delivered to key stakeholders. An example would be How To Conduct A Root Cause Analysis for those responsible in Problem Management for identifying the root cause of a problem. Be sure to refer back to your gap analysis. Below is an example table that aligns training to roles.

Course	Staff							
	Senior Executives	Program Manager	Global Change Manager	Local Change Managers	Local Change Coordinators	Change Advisory Board Members	Change Initiators	IT Staff
Generic Process and Tool Training	X	X						X
Specific Role-Based Process & Tool Training			X	X	X	X	X	

Staff	Senior Executives	Program Manager	Global Change Manager	Local Change Managers	Local Change Coordinators	Change Advisory Board Members	Change Initiators	IT Staff
Course								
Specialized Training, e.g. How To Conduct A Risk & Impact Assessment			X	X	X	X		
Other Specialized Training								

4.5.4 Individual & Process Role Training

As previously mentioned, part of the training plan is to identify training for both individuals and process roles. Understanding what skill gaps exist in individuals and process roles will help define the skill gaps within functional groups.

The following table provides an overview of the individual and the process roles. The skill gaps, process deployment timelines and critical needs of an organization will drive the prioritization and scheduling of the appropriate training.

Staff	Tom	Betty	Susan	Gary
Functional and Process Activities				
Service Desk Activities				
Incident Management Activities				
Problem Management Activities				
Change Management Activities				
Release Management Activities				
Configuration Management Activities				
Add Other Activities As Needed				



Below is another perspective on aligning the roles with different training courses and workshops. This chart shows what training provides a certification and additional training provided by Pink Elephant that supports ITSM program training plans.

JOB TITLES	Change Coordinator, Network Analyst, Support Analyst	Service Desk Manager, Support Manager, Problem Manager, Operations Analyst	Configuration Manager, Change Manager, Release Manager	Account Manager, Service Level Manager, Service Manager/Owner	Systems Analyst, IT Process Designer, Quality Manager, IT Planner	IT Service Manager, ITSM Consultant	IT Manager, CIO, IT Director
COURSE							
Foundation Certificate In IT Service Management	✓	✓	✓	✓	✓	✓	✓
Service Strategy						✓	
Service Design						✓	
Service Transition						✓	
Service Operation						✓	
Continual Service Improvement						✓	
Managing Across the Lifecycle						✓	
Operational Support & Analysis		✓					
Release, Control & Validation			✓				
Service Offerings & Agreements				✓			
Planning, Protection & Optimization					✓		
How to Create a CMDB			✓				
How to Create a Service Catalog				✓			
Define and Implement Processes		✓	✓	✓	✓	✓	
Conducting a Process Assessment		✓	✓	✓	✓	✓	
Implementation Roadmap					✓	✓	
Developing a Vision & Strategy							✓
CAPABILITY	ITIL Awareness	Service Support	Service Config. and Transition	Service Ownership/Mgmt.	Service Planning	ITIL Expert, Service Manager	IT Service Executive

 Official ITIL V3 Certification Course

4.6 Evaluate & Modify Process & Tool Training

If process and tool training materials already have been developed and are in use, it is recommended to evaluate this material on a consistent basis to ensure that they cover in detail the process job requirements and skill gaps that were previously identified. Any gaps in the training materials will require updating and testing. Trainers will have to become familiar with the new materials before they are asked to deliver the training.



4.7 Create Job Aids

It is a good idea to create some job aids that can be handed out during the training session and that the employees can use back on the job. These should be one-page documents that provide quick guidance on how to perform a certain process activity or show the high level process workflow. It could also document the key activities for each process role. Discuss with the Direct Report Managers, Process Owners and Process Managers what type of job aids would work best for your organization.

4.8 Develop & Deliver Training

For certification courses work with your vendor to schedule the required courses.

For internally developed and delivered training on your own process and tool, this task is often overlooked and not accounted for in the project plan. Providing process and tool training cannot be an afterthought, but needs to be a part of your ITSM strategy and plan.

After all the requirements and plans are documented, then it is time to develop the training material. Most organizations are responsible for development of their own process and tool training. If this is the case, be sure to have a consistent curriculum design for all the training courses. For process and tool training, it is most effective to allow the training participants to actually use the tool instead of using screen shots of the tool. It is important to select the right resources to develop and deliver the internal training.

Below are the key activities to prepare and deliver training.

- Identify who will develop the training material – It is best if this person has some knowledge around curriculum design
- Identify the trainer(s) – These will be individuals who are subject matter experts on the process, are knowledgeable of how the ITSM tool works, and also are able to actually transfer knowledge to the attendees
- Develop training material – A consistent approach to developing the training material is best. Be sure to build in the top process job requirements that were previously identified. Keep in mind that training material will be at different levels. One course will be the more generic process course and the other will be a more detailed course for those employees who will be responsible for performing the process activities and using the ITSM tool



- Test training material – As with any release, it is important to test what is going to be put into production. Test the training material using a small pilot group of participants. Modify the training based on feedback
- Identify the training participants – This will be prioritized based on individual needs, process needs and functional group needs
- Schedule training participants and a training room, including any AV requirements and also the use of the ITSM tool in a lab or test environment if possible
- Deliver training – Organizations will determine the best method to deliver training to the different training audiences. There may be a blend of virtual, Computer Based Training (CBT), online and instructor led. As mentioned, training plays a key role in managing organizational change and this means that there needs to be an opportunity for two-way communication between training participants and the trainer
- Follow-up – The trainer is recommended to follow up with the training participants after the training to see how they are doing. This does not take away the responsibility for the direct report manager, process owner and/or process manager to also check in with the participants to ensure they are getting a chance to use their new knowledge and skills

Ensure that the coaches and mentors have been identified and are aware of their responsibilities when the training participants come back on the job. The training participants need to be allowed to use their new skills, begin performing their process activities, and use the ITSM tool.

4.9 Evaluate Training Effectiveness

One of the last training activities is to evaluate the effectiveness of the training. The best way to assess the training effectiveness is to determine if the training participants are able to successfully and consistently perform the top process requirements that have been documented. The coaches and mentors can provide input into the employee's ability to perform the process activities. Other means for assessing the training effectiveness is to conduct process assessments and audits.

Another quote to remember – You get what you inspect, not what you expect

Feedback on the training's effectiveness needs to be provided to the Program Manager and the person or persons who are responsible for the training activities defined in the above section. A review will then need to be made as to any modification to the training materials or training approach.



5 KEY TRAINING ROLES

Successful ITSM training will require having the right resources available at the right times in order to develop, deliver and provide ongoing maintenance to the training program. Following are key roles to be considered.

- Training Lead – Leads the overall training effort for the ITSM program. This person is responsible for ensuring that the additional training roles are filled during the ITSM program
- Training Developer – Responsible for ensuring that the process and tool training is developed in support of the new process to be deployed
- Trainer – Responsible for the training that will be delivered in support of the new process that will be deployed or providing general ITIL or process awareness training
- Coach and/or mentor – This person is assigned to be a coach and/or mentor to those people who have gone through the training. This person could be the process owner, a process manager or someone who has performed the process activities and is considered a subject matter expert
- External Vendor – An external vendor will provide the certification and other training that that may not be available within an organization, e.g.: ITIL Foundation, Practitioner, Service Manager courses or the training around How to Manage Organizational Change and How to Develop Processes



6 CONCLUSION

Be sure to build your training strategy and plan early on in the ITSM program. It is critical to understand the needs and timing of the training of the employees to support the ITSM program and multiple process projects that will be worked on. Providing different types of training will be required to ensure that employees are adequately prepared to begin performing their process activities.

Process Owners, Process Managers as well as direct report managers at different levels within the organization are all responsible for identifying requirements and existing skills as well as working with the employees before, during and after training has taken place.

Training is an excellent vehicle to help manage organizational change. That is why it is so important that the employees clearly understand why they are going to training and how it aligns back to the Business and IT's strategies, goals and objectives.

If you do find that an employee is not performing as they should be, before you send them to training ask yourself if there is something that could be causing the employee to be struggling in his or her role.

7 ABOUT PINK ELEPHANT

Pink Elephant is recognized as a global leader in assisting IT organizations understanding, defining and integrating and delivering effective IT services to their customers – the business. Over the years Pink Elephant has refined its model for assisting organizations – large or small – in creating an ITSM strategy, designing the processes and practices to underpin that strategy, and then the successfully implementing and improving the ITSM practices over time.

The Pink Elephant model is a lifecycle approach or the Pink Elephant “ITSM Program Roadmap”.

