



The Art of Building a Successful ITSM Process Design Team

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1 INTRODUCTION

Documenting processes is rarely on an organization's priority list; however, it is a necessity once organizational complexities no longer support an organic approach to key management processes. Other key drivers that may force a company to the drafting table are risk to the business mission or legal requirement of an audit. Whatever an organization's drivers may be, it will one day find that it is time to formally put pen to paper and map out the who, what, when and why of what the organization does, or perhaps more importantly, what it should be doing.

When an organization decides to take on this task they are inevitably faced with a shortage of internal resources to accomplish their process design goals. They also often find out that their current processes no longer scale or need to be changed to follow best practices. This double constraint often prompts the search for external organizations or consultants to help short-cut new processes, preferably with pre-defined templates and hard won experience.

While it can be helpful and efficient to employ external process design resources, it is important to first understand the potential negative outcomes associated with bringing in external resources, and second, knowing how to avoid those scenarios.



2 USING EXTERNAL CONSULTANTS

When it comes to IT Service Management (ITSM) process design, deciding how and when to use external resources is a very important. The decision can either fast track stages of your process design initiative or result in wasted money with no lasting impact or value for your investment.

While it is true that external resources can provide the missing expertise and hands-on knowledge, it is equally true that these resources can be seen as outsiders, limiting their ability to change perception and current practices. Unfortunately, this can result in the external consultant failing at certain tasks if their talents are not employed wisely.

For example, if external consultants are brought into an organization to document current practices, the consultant usually conducts workshops and interviews to gain a more holistic understanding of the organization's existing policies, processes and roles. The results of these exercises are then usually presented as a written account of the current practices of the organization as a starting point for improvement projects.

However, if an organization is undergoing internal change to follow a best practice framework, then the organization is undertaking a transformation project. Adopting a best practice framework, such as IT Infrastructure Library (ITIL[®]) or CMMI, means convincing a culturally diverse organization that its long held behaviors and practices need to change.

In this second scenario, it can be self-destructive to assume that the organization can employ an outside firm as the organization is usually just left with an impressive process binder that no one adopts. Even though the consultant did involve the organization through interviews and workshops, many will treat the process as a "not invented here" deliverable, which will simply sit on the shelf and not be followed.



3 BUILDING BUY-IN THROUGH SWEAT EQUITY

A transformation project requires organizational involvement in the heavy lifting of a process design as well as software configuration and the internal stakeholders will not feel connected to the new process unless they have been involved in its design.

However, if you accept this premise, the key question and constraint continues to be “how do we free up the internal resources to work on this project in some meaningful capacity?” The answer to this question is a blended approach of using both internal and external resources.

Here are a few important assumptions:

- The most likely candidates for your internal design team are already engaged in other activities, making dedicated commitment to the project not plausible
- Involve key stakeholders in the design so that they believe it will work for the organization
- Use external consultants to bring the key value elements of experience, knowledge, resources and fast track templates to the table
- It is important to realize that without a formal project approach to the transformation effort, little change will occur; transformation efforts never succeed as a side of the desk activity
- Balance the involvement of high-value, internal resources with a need for speed to delivery
- The true deliverable of your project is not a completed process document but your organization adopting the processes to operate in a new way

This last point is perhaps the most significant assumptions and is the basis of why using **only** external resources to help define your new processes is not a viable solution.

- **It is the process of building and gaining agreement (not consensus) that is the true deliverable of a process design project**

The documentation of a finished process is the icing on the cake for actually supporting a transformation project; the true goal of a transformation project is to change an organization’s behavior and culture. It is necessary to define a process, write it down, and automate it in a software application, but keep in mind that these steps are only enablers of cultural transformation.



4 BALANCING YOUR TRANSFORMATION TEAM

At Pink Elephant our experience tells us that there are seven key ingredients to a successful recipe for building transformation teams:

1. Establish a formal project with the classic project sponsorship, governance, and controls necessary to accomplish any major initiative. This often allows resources to be freed up and allowed to work on process design activities.
2. Source a reliable, external, trusted advisor that has a solid track record in supporting process transformation projects. This vendor should provide strategic, tactical and operational support and come equipped with time-saving tools.
3. Develop a small part-time internal process design team that will work on the process deliverables. There are two options that can support process design efforts: one option is to schedule the team 2-3 days a week for a period of 6-8 weeks (schedule permitting) The other option, which Pink recommends, is to schedule a Rapid Process Design workshop where this team would meet for one week to work under the guidance of the trusted advisor. At the end of the week approximately 80% of the process work should be completed. The team will need to meet for a couple of days for 2-3 weeks to complete the process design. This team should be made up of internal subject matter experts, change agents from key stakeholder groups, and be supported by your external advisor and software administrators responsible for process automation.
4. To optimize organizational acceptance, define an internal stakeholder group of middle and senior management roles. Have this group provide feedback and approval on your process deliverables either through email feedback loops or workshops.
5. Early on start defining the ongoing process governance, support, and execution roles that will employ the process after it has been deployed.
6. Leverage other organizational support groups such as corporate communications, HR, internal audit, procurement and software development to support your initiative.
7. Plan your deployment and rollout strategy to occur as rapidly as possible without jeopardizing your existing service delivery (it's not easy to change your tires as you are driving down the highway).



5 CONCLUSION

Many organizations try to short-cut their efforts of designing processes by relying exclusively on external resources, believing that the involvement of internal input is unnecessary. Unfortunately many organizations find that to impose change without involvement of the internal team results in short-term success but eventual rejection of the change once the heavy hand of compliance is lifted.

When individuals and key stakeholders take on an active role in designing new processes, they often develop an emotional attachment to their deliverables and want to see their efforts successfully deployed. It is amazing how far a little bit of sweat equity will go to convince people that change is a good, or at least an acceptable thing.

The bottom line is that having involvement in the process design creates a sense of ownership, buy-in, and adoption, which is the ultimate key for implementing new or modified processes.