

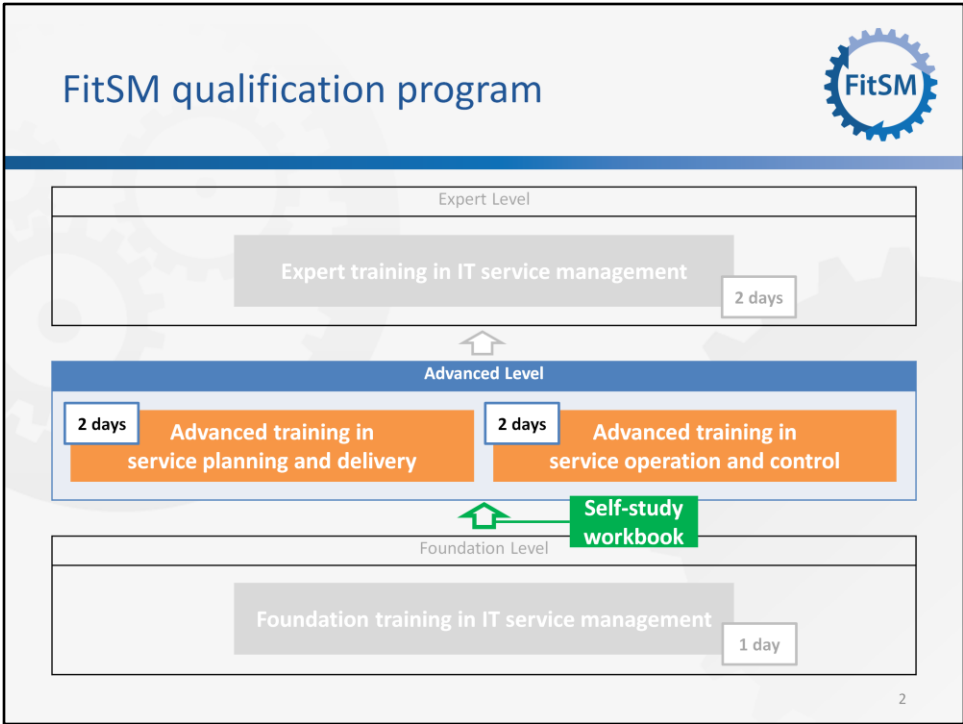


This workbook has been designed for self-study and preparation for the following trainings:

- Advanced training in service planning and delivery (SPD) according to FitSM
- Advanced training in service operation and control (SOC) according to FitSM

Instructions:

- Please print out your personal copy of this workbook.
- To answer the questions in this workbook, you may also consult the FitSM-0 and FitSM-1 standards as well as the FitSM Foundation training material (handout).
- Write your answers directly in this workbook. The time required to answer all questions in this workbook is approximately 90 minutes.
- Having this workbook completed prior to the course is highly recommended for taking part in any of the FitSM Advanced trainings.
- Please bring your paper copy of the completed workbook to the training.



Above figure shows the FitSM qualification scheme. When dealing with this workbook, you should already have participated in the FitSM Foundation training and passed the FitSM Foundation exam.

The goal of this workbook is to recapitulate some basic knowledge on FitSM and IT service management as covered by the FitSM Foundation training.

How this workbook is structured



- ITSM and FitSM basics
 - Key terms and definitions
 - FitSM (and related frameworks)
 - General aspects of establishing a service management system (SMS)
 - IT service management processes



ca. 90 min

Key terms & definitions



Definition following FitSM-0:

...(1)...

A way to provide *value* to a *user / customer* through bringing about results that they want to achieve

Definition following FitSM-0:

...(2)...

Organisation or *federation* or part of an organisation or federation that manages and delivers a *service* or services to *customers*

Definition following FitSM-0:

...(3)...

Structured set of *activities*, with clearly defined responsibilities, that bring about a specific objective or set of results from a set of defined inputs.

Questions / Assignments

4

The definitions given above are taken from FitSM-0 (overview and vocabulary).

Please identify the terms for which the given definitions apply.

(1)

(2)

(3)

Key terms & definitions



Definition following FitSM-0:

...(4)...:

User / customer facing list of all live *services* offered along with relevant information about these services

Definition following FitSM-0:

...(5)...:

Documented agreement between a *customer* and *service provider* that specifies the *service* to be provided and the *service targets* that define how it will be provided

Definition following FitSM-0:

...(6)...:

Documented agreement between a *service provider* or *federation member* and another part of the *service provider's* organisation or the *federation* to provide a *service component* or subsidiary *service* needed to allow provision of *services* to *customers*

Questions / Assignments

5

The definitions given above are taken from FitSM-0 (overview and vocabulary).

Please identify the terms for which the given definitions apply.

(4)

(5)

(6)

Key terms & definitions



Definition following FitSM-0:

...(7)...:

Unplanned disruption of operation in a *service* or *service component*, or degradation of service quality versus the expected or agreed service level or operational level according to *service level agreements (SLAs)*, *operational level agreements (OLAs)* and *underpinning agreements (UAs)* with suppliers.

Definition following FitSM-0:

...(8)...:

Request for information, advice, access to a *service* or a pre-approved *change*

Definition following FitSM-0:

...(9)...:

The underlying cause of one or more *incidents* that requires further investigation to prevent incidents from recurring or reduce the impact on *services*

Questions / Assignments

6

The definitions given above are taken from FitSM-0 (overview and vocabulary).

Please identify the terms for which the given definitions apply.

(7)

(8)

(9)

Key terms & definitions



Definition following FitSM-0:

...(10)...:

Element that contributes to the delivery of one or more *services* or *service components*, and therefore needs to be controlled

Definition following FitSM-0:

...(11)...:

Store for data about *configuration items* (therefore configuration data)

Definition following FitSM-0:

...(12)...:

Documented proposal for a *change* to be made to one or more *configuration items*

Definition following FitSM-0:

...(13)...:

Set of one or more *changes* to *configuration items* that are grouped together and deployed

Questions / Assignments

The definitions given above are taken from FitSM-0 (overview and vocabulary).

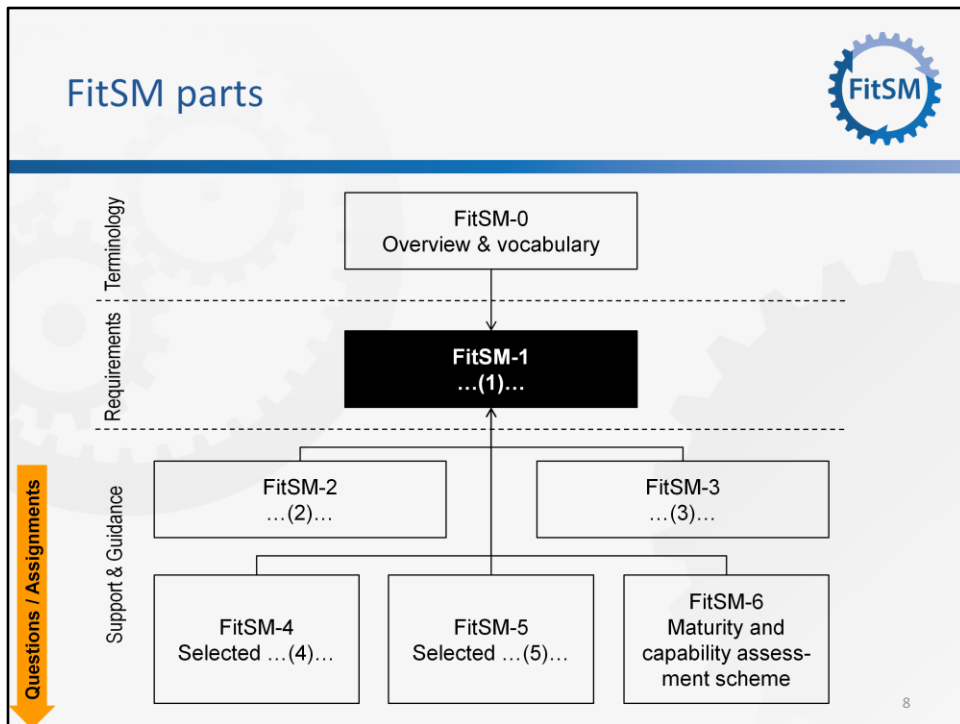
Please identify the terms for which the given definitions apply.

(10)

(11)

(12)

(13)



FitSM is a family of standards for lightweight IT service management, freely available under www.fitsm.eu. It consists of seven parts – from FitSM-0 to FitSM-6. **Please complete the titles of the different parts of the FitSM standards family.**

- (1)
- (2)
- (3)
- (4)
- (5)

FitSM-1 defines 85 requirements that should be fulfilled by an organisation (or federation) offering IT services to customers. **What are the two major types of requirements covered by FitSM-1?**

- 1. _____
- 2. _____

FitSM-1: General requirements for a service management system (SMS)



- GR1 Top management commitment & responsibility
- GR2 Documentation
- GR3 Defining the scope of service management
- GR4 Planning service management
- GR5 Implementing service management
- GR6 Monitoring and reviewing service management
- GR7 Continually improving service management

Questions / Assignments

9

These are the seven topic areas of general aspects to be considered when establishing a service management system (SMS) according to FitSM-1.

Please assign each of the following activities to the topic area (GR1 to GR7) it is mostly related to:

- Define a general service management policy: GR ____
- Define the goals and timing of implementing service management: GR ____
- Ensure that service management documentation is regularly reviewed: GR ____
- Conduct audits and assessments of the service management processes: GR ____
- Identify corrective actions after a nonconformity has been detected: GR ____
- Define overall service management roles and responsibilities: GR ____
- Identify and plan the use of technology (tools) to support the SMS: GR ____
- Identify, for which geographical sites or services the SMS is valid: GR ____
- Assign one individual to be accountable for the overall SMS (SMS owner): GR ____
- Enforce that the defined service management processes are followed in practice: GR ____

FitSM: IT service management processes



- PR1: Service portfolio management (SPM)
- PR2: ...(2)...
- PR3: Service reporting management (SRM)
- PR4: Service availability & continuity management (SACM)
- PR5: ...(5)...
- PR6: Information security management (ISM)
- PR7: ...(7)...
- PR8: Supplier relationship management (SUPPM)
- PR9: Incident & service request management (ISRM)
- PR10: ...(10)...
- PR11: Configuration management (CONFM)
- PR12: ...(12)...
- PR13: Release & deployment management (RDM)
- PR14: ...(14)...

Questions / Assignments

10

This is a list of the core IT service management processes that FitSM is based on (in the order in which they appear in FitSM-1).

Please name the missing processes.

(2)

(5)

(7)

(10)

(12)

(14)

FitSM: Process goals / objectives



1. To establish and maintain a good relationship with customers receiving services
2. To investigate the root causes of (recurring) incidents in order to avoid future recurrence of incidents by resolving the underlying problem, or to ensure workarounds / temporary fixes are available.
3. To maintain a service catalogue, and to define, agree and monitor service levels with customers by establishing meaningful service level agreements (SLAs) and supportive operational level agreements (OLAs)
4. To ensure sufficient service availability to meet agreed requirements and adequate service continuity in case of exceptional situations
5. To bundle changes of one or more configuration items to releases, so that these changes can be tested and deployed to the live environment together
6. To restore normal / agreed service operation within the agreed time after the occurrence of an incident, and to respond to user service requests
7. To specify all service reports and ensure they are produced according to specifications in a timely manner to support decision-making
8. To define and maintain a service portfolio
9. To establish and maintain a healthy relationship with suppliers supporting the service provider in delivering services to customers, and to maintain contracts with suppliers
10. To ensure sufficient capacities are provided to meet agreed service capacity and performance requirements
11. To provide and maintain a logical model of all configuration items and their relationships and dependencies
12. To ensure changes to configuration items are planned, approved, implemented and reviewed in a controlled manner to avoid adverse impact of changes to services or the customers receiving services
13. To identify, prioritize, plan, implement and review improvements to services and service management
14. To manage information security effectively through all activities performed to deliver and manage services, so that the confidentiality, integrity and accessibility of relevant assets are preserved

Questions / Assignments

11

These items describe (in mixed order) the goals / objectives of the 14 IT service management processes covered by FitSM (see previous page).

For each listed goal, please identify the correct process.

- | | |
|-----|------|
| (1) | (8) |
| (2) | (9) |
| (3) | (10) |
| (4) | (11) |
| (5) | (12) |
| (6) | (13) |
| (7) | (14) |

FitSM-1: Process-specific requirements



- Overall, FitSM-1 defines 85 requirements that should be fulfilled by an organisation (or federation) offering IT services to customers.
- Compliance with the 85 requirements can be regarded as a “proof of effectiveness”.
- The 85 requirements are structured as follows:
 - 16 general requirements (GR) – see page 9 of this workbook
 - 69 process-specific requirements (PR) – see the processes listed on pages 10 of this workbook

Questions / Assignments

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Please assign each of the following topics / requirements to the process (PR1 to PR14) it is connected to:

- Creation and approval of plans that cover measures to reduce the probability and impact of availability and continuity risks : PR ____
- Management of customer satisfaction and conducting service reviews regularly: PR ____
- Maintenance of the service catalogue: PR ____
- Maintenance of the service portfolio: PR ____
- Performance monitoring of services and service components: PR ____
- Analysis of trends on incidents and maintenance of information on known errors : PR ____
- Planning the design and transition of new or changed services: PR ____
- Registration, classification, prioritization, escalation and closure of incidents: PR ____
- Maintenance of a schedule of changes: PR ____
- Verification of the information stored in the CMDB: PR ____
- Definition and implementation of security policies and controls: PR ____