

The CMDB & CMS Conference Interactive Stream Session Report

Olympia Conference Centre London, 8th - 9th July 2008

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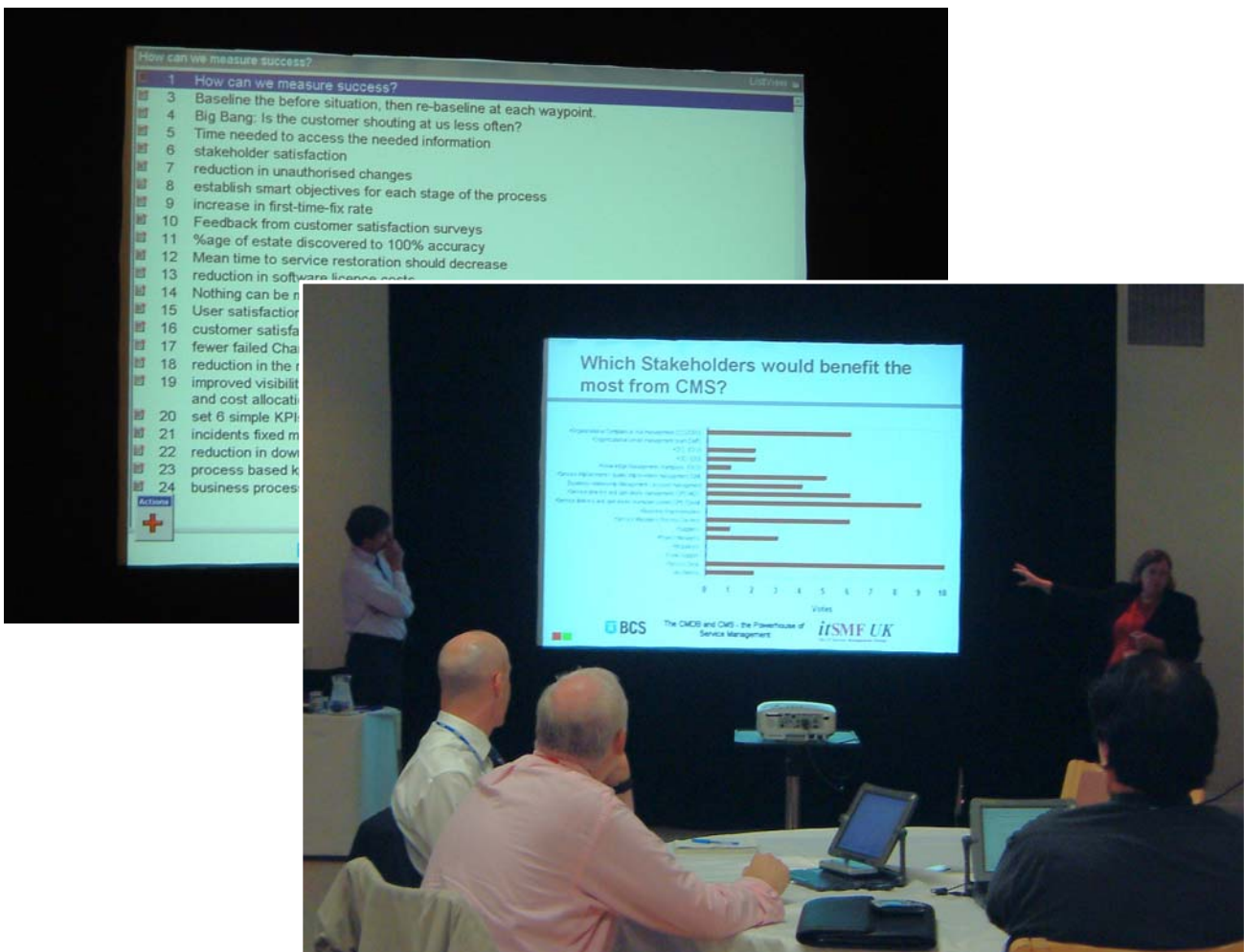
1 Introduction

1.1 The Interactive Approach

The interactive approach uses linked wireless laptops with specialist software to enable ideas, questions and knowledge to be gathered and shared in a fast and efficient manner.

This approach applied to short 45 minute sessions harnesses the collective knowledge and experience of the delegates and records a broad body of valuable information for further discussion and analysis.

The technology can be applied in focussed day workshops to enable a richer and more in depth outcome.



1.2 Interactive Session Overview

The Interactive Sessions were designed by:

- Shirley Lacy, BCS CMSG and itSMF (shirley.lacy@connectsphere.com)
- Nick Leigh, TheReallyUseful.com (Design, Technology and Report)
- Sarah Boulton, Realise Europe (Design and Facilitation)

The eleven 45 minute sessions over the two days covered the following topic areas:

[What is the CMDB / CMS All for?](#)

Shirley Lacy, ConnectSphere and Ivor Macfarlane, IBM

[How can we judge the value of CMDB / CMS?](#)

John Dixon, GlaxoSmithKline (from material based on research and surveys)

[CMS – Barriers and Critical Success Factors \(CSFs\)](#)

Kevin Holland, NHS Connecting for Health

[CMS Implementation Case Study](#)

Andrew Pieri and Mark Smith, Associated Newspapers Limited

[How to improve an existing CM Process](#)

John Metcalfe, BCS CMSG, Deirdre Connis itSMF CCRM

[Service Management requirements for the CMDB / CMS](#)

Ian Salvage, IBM

[Service Asset and Configuration Management Visions and Strategies](#)

Mike Tomkinson, BT Global Services

[How do you populate your CMDB?](#)

Harvey Davison, Lloyds

[Bringing the CMS to fruition](#)

Mark Bools, Principia

[Selecting CMS Tools](#)

John Metcalfe, BCS CMSG

[What works and what doesn't](#)

Shirley Lacy, ConnectSphere and Ian Salvage, IBM

2 What is the CMDB / CMS All for?

2.1 Presentation

Shirley Lacy and Ivor Macfarlane, authors of the ITIL Service Transition book.

2.2 Objectives

This session followed on from the plenary session that covered the CMDB/CMS and what configuration management has become in the 21st century. The objective was to identify common problems implementing a CMDB/CMS (in the 21st century) and gather feedback on the ITIL V3 CMS and SKMS.

2.3 Contributors

23 including representatives from:

Principia IT, LFEPA, Bloor, Fujitsu Services, Mediatek, BAA, HMPS, Lloyd's of London, BAE Systems, EADS DS UK Ltd, iCore, Teliasonera, Eracent, Shell, Prudential, Stannah, ECB, Axios Systems

2.4 What are the common problems in implementing a CMDB/CMS?

The delegates were asked to consider and discuss the following question: "What are the common problems in implementing a CMDB/CMS?"

Using the mini-laptops on their tables, the delegates recorded their responses under the following headings:

1. Demonstrating value / benefit
2. Stakeholders
3. Requirements
4. Design
5. Realisation

Their verbatim output is as follows:

2.4.1 Demo value / benefit

- Benefits often difficult to sell (intangibles)
- IT are poor at communicating the benefits
- Demonstrating value / benefit
- Covering the bigger picture, providing immediate answers
- Client does not know what the system can do
- IT attitude that it is "their" CMDB
- Establishing useful metrics
- For a tool implementation, theory often differs from the reality of implementing in a complex/legacy organization
- Often implemented to provide compliance with company governance or to seek certification against standards, without any real thought as to how the business will benefit. In other words - do it because it's the right thing to do but not think about what will be achieved.

-
- How to turn it into language business can understand
 - Being able to produce simple cost benefit examples
 - Getting people to use and maintain CMDB
 - Everybody involved needs to know what is in it for them in order for them to commit to involvement

2.4.2 Stakeholders

- Senior stakeholders talk the talk but are not investing in the process and people. They think tools are the only answer
- Silo groups want their own CMDB and own process
- Getting necessary senior management buy in
- Identifying who can do the signoff and getting the business to understand the value of what is proposed
- Identifying the right stakeholders who stand to gain by the implementation and also hold the key to removing barriers
- Lack of suitable/knowledgeable resources from all appropriate areas
- Lack of support, and lack of management and user 'buy-in'
- Stakeholders with a small amount of experience or training. Hold misconception and can almost use stock terms or phrases as a defence or handoff. Possibly through fear of being seen as 'incompetent' or simply unaware
- Understanding who pays for the implementation and ring-fencing the resources for this

2.4.3 Requirements

- Getting the scope right - what CIs do we need to know about?
- Continual scope creep - both from customers and users
- Expectation mismatches between customer groups
- Scoping - what is the right depth?
- Scope - what should be maintained in CMS
- Having a firm specification at the start to ensure all areas are covered during this phase
- The scope is always wider than you originally think!
- Unrealistic timeframe to implement CMDB
- Implementing prioritisation, capturing what is required, not what is available

2.4.4 Design

- Where do you start? i.e. assets, stakeholders
- Redundancy and deletion of obsolete CI's
- Granularity of CIs has been difficult to balance between technical and business focus and what is a manageable level
- What - in your organisation needs to be controlled, and where is this information currently
- Silos within the company can create difficult CMDB design issues
- TE
- Complexity of ICT services
- Identifying what constitutes a CI. Specific to the organisation
- Technical architecture supporting discovery automation, reconciliation and integration with change and other process to facilitate easy of maintenance not available.

- Tools aren't scalable for SME's
- Lack of Integration tools between various CMDB sources
- Creating an applicable data model, pulling together the design requirements with the requirement from other areas Finance, Commercial, etc
- Start small and see what can be done without massive investment - this enables faster buy-in from clients

2.4.5 Realisation

- Maximise the different "CMDBs" while allaying fears of redundancy in people-ware
- Too many existing systems already embedded into existing processes
- How to keep data maintained
- What do you REALLY want from your CMDB - what can it do with it
- Distributed data sources and lack of commonality in format
- Maintaining the quality and consistency of the data
- Gathering the correct and complete information about certain CI types (e.g. users) in disparate environment
- Data quality - how to ensure it. How to identify/measurer data quality.
- Buy it or Make it sorting out the Pro's and Con's
- Vendor lock in from service desk area - they say they are open interfaces but so far this has not been demonstrated
- Realisation that one-size does not fit all, and larger organisations have various different levels facing different areas

2.4.6 Other

- Approach - big bang (revolution) or gradual (evolution)
- All or nothing attitude
- Resourcing
- Service management is IT led and collaboration with service developers is seen as entering 'wrong' territory
- Configuration management still seen as the 'dark side' of service management
- Turn the workings of config mgmt into non-it examples, e.g. motor cars, using a recipe

2.5 Feedback

Following short presentations by Ivor and Shirley the delegates were invited to give feedback via the interactive technology. Working individually, each delegate was asked to consider their responses under the following headings:

- PLUS: This is what I liked about what I heard
- MINUS: These are my issues and concerns
- INTERESTING: Thoughts and insights
- QUESTIONS: Questions for the speaker and each other

The verbatim output from the group follows:

2.5.1 PLUS: This is what I liked about what I heard

- Putting things in the right place
- Reassurance that am on the right course
- Reassured that industry is behind initiatives
- I like the models
- Makes people think about the end result they expect from Config - the views, reports... outputs!
- The model seems much more integrated than v2 - looking at the bigger picture and the interfaces between the different areas of service management
- Can already see benefits of implementing CMS in our organisation using this model.
- Acknowledgement that disposal of resources/assets/etc needs to be better defined and controlled
- Quality and assurance improvements
- General Plus - the Event in general pulling unique people together with shared interest, so that we find out we are not alone!!

2.5.2 MINUS: These are my issues and concerns

- Very High level information.
- Models are sometimes incomplete or have too much - difficult to balance
- Concern that the current approach is moving Service further away from Project/Business/Application and front-end activities.
- Practical models and implementations - how do we move towards sharing experiences on an ongoing basis - perhaps a CMDB of experiences?
- It all looks good on the diagram but implementation is another matter. It all looks rather complex.
- Abstract - can models be continued and shaped for specific needs and granularity
- Scope of ITIL V3 is too big, technology is not ready to achieve V3.
- The CMDB becomes an end in itself.
- How do I measure improvement when I have limited cm capabilities to start with
- issues that may arise when attempting to show management that this is the best way forward, where little process or standards are in place - i.e. no previous ITIL processes used
- V3 does not reflect multi supplier organisation.
- As the CMDB scales administration becomes a significant overhead
- Making the ITIL information technology-agnostic has its disadvantages - when will itSMF start putting some recommendations behind implementing these in practice
- Lack of support and guidance from outside the company
- Security issues. A centralised data source may represent an unacceptable security risk.

2.5.3 INTERESTING: Thoughts and insights

- Would love to apply the service knowledge concept to the platform I currently work on at the application level
- Do I need a CMDB for small projects or will spreadsheets do the job?
- In the realms of software configuration management there is a thought that this is CM and not the overall image
- For smaller companies, the CMS-CMDB concept can be difficult to grasp - whilst it is correct, for them the simplification of a single CMDB can make it easier
- Interesting that there is more than one 'definitive' media library! Shouldn't this be 1 DML spread over multiple locations?

2.5.4 QUESTIONS: Questions for the speaker and each other

- What is the possible admin burden?
- Have you seen a CMS implemented according to the model shown in the presentation?
- Where do I start to convert those reluctant to change to new ways of working?
- How do you stop the CMDB becoming an end in itself?
- What is the IPR with using the models?
- While leveraging publication costs from organizations, make more official publications available to individuals at discounted prices.
- Query why DSL has been amended to DML, as the terms Software has always been fairly broad and comprehensive and included media like video, MP3, web content, etc
- Why can't we have lite version of ITIL version for small organisation?
- How can you easily explain to Management, peers, and users what CM is - any change of a 'Dummy's guide to CMS'?
- Can IBM clear case/quest be a CMDB?
- There is a lack of industry standard data model - what are the BCS and itSMF doing about this?

3 How can we judge the value of CMDB/CMS?

3.1 Presentation

John Dixon, GSK

3.2 Objectives

The objective of this session was to identify and prioritise the value of a CMDB/CMS for key stakeholders.

3.3 Contributors

21 contributors including representatives from:

CA, Bloor, EDS, ESA, O2, ECB, Eracent, University of Oxford, NHS Connecting for Health, Unilever, Transport For London, Motability Operations, Atos Origin, ASG, Tideway, Royal Bank of Scotland, Deutsche Bank, Simmons, DeltaRail Group Limited

3.4 Starter Stakeholders and stakeholders offered by the group

John Dixon presented a summary of his research on the value of the CMDB/CMS and then asked the delegates to consider the following list of stakeholders:

- Organizational Compliance/ risk management [CCO/CRO]
- Organizational senior management team [SMT]
- CFO [CFO]
- CIO [CIO]
- Knowledge management champions [CKO]
- Service improvement / quality improvement management [QM]
- Business relationship management / account management/service level management [BRM/SLM]
- Service delivery and operations management [OPS MGT]
- Service delivery and operations teams/personnel [OPS TEAM]

There followed a group discussion in which the following additional stakeholders were proposed and accepted.

- Business Representative
- Service Managers Process Owners
- Suppliers
- Project Managers
- Regulators
- Tools Support
- Service Desk
- Architects

3.5 What is the value of CMDB / CMS to your chosen stakeholder group?

Working in table groups, the delegates were asked to choose a stakeholder and discuss: "What is the value of CMDB / CMS to your chosen stakeholder group?"

Each group was invited to record their discussion using the interactive technology indicating whether the value was sector specific and which of the values was the most important (marked with a star *)

3.5.1 Table 1

3.5.1.1 Business Representatives

- The value to this stakeholder is being able to assess the impact of change
- IT fit for purpose:
- Enable the business to be more successful through IT. Improved (1) stability (2) Availability (3) Agility (4) Transparency - openness, cost, performance, risk, values etc

3.5.2 Table 2

3.5.2.1 SMT

- The value to SMT is a full understanding of the relationship between business processes and complete IT estate.
- SMT Value: IT as black box supplier of business enabling services
- The understanding will reduce risks through improved impact assessment in change and incident management
- Understanding the relationships will allow optimisation of the IT estate that will reduce costs and increase ROI
- This understanding also increases the responsiveness of IT Support through better prioritisation in line with business needs.
- This understanding will enable allocation of costs to changes, outages and incidents

3.5.2.2 Architects

- Architects - Ensuring alignment of the strategic objectives of Configuration Management with the strategic objectives of IM Strategy (e.g. CIs within scope, toolset integration)*
- Architects - Ensure that the data within scope of Configuration Management will support effective strategic decision making (e.g. data is of a suitable quality and integrity)

3.5.2.3 Service Management Process Owner

- Service Management Process Owner (Change Mgmt): To ensure all changes are traceable and have relationships to the respective Incident, Problem and Release records.*
- Service Management Process Owner (Change Mgmt): To have the appropriate level of information to effectively assess the impact of a particular change, based upon the associated risk profile of the change.

3.5.3 Table 3

3.5.3.1 Service Desk

- The value of CMDB and Configuration Management to Service Desk (as a function of Incident Management) is to provide the right information, accurate and up-to-date, so that normal service is restored ASAP in the event of an incident

3.5.3.2 Project Manager

- Stake holder - project Manager
- The value is to improve the quality and availability of relevant information through the complete project lifecycle to support the delivery of projects on time and to budget and with improved quality

3.5.4 Table 4

3.5.4.1 SMT

- *SMT: Can see what they are governing. - Fewer failed changes, better confidence in what needs to be purchased, enables leverage of existing assets, etc. Helps to inform the cost attribution processes.
- SMT: Increase confidence that IT can deliver what is required, because it demonstrates that IT knows what is where.
- SMT: Provides an audit trail for the senior management team that can be used to support & prove regulatory compliance.
- SMT: CMS promotes business capability/agility - ability of the business to create new market opportunities
- SMT: Increased 'up time', improved service level achievement, reduced support costs, inc fewer instances of 'rework' to implement failed Changes

4 CMS - Barriers and Critical Success Factors

4.1 Presentation

Kevin Holland, NHS Connecting for Health

4.2 Objectives

To identify and prioritise Critical Success Factors and Barriers to implementing CMS

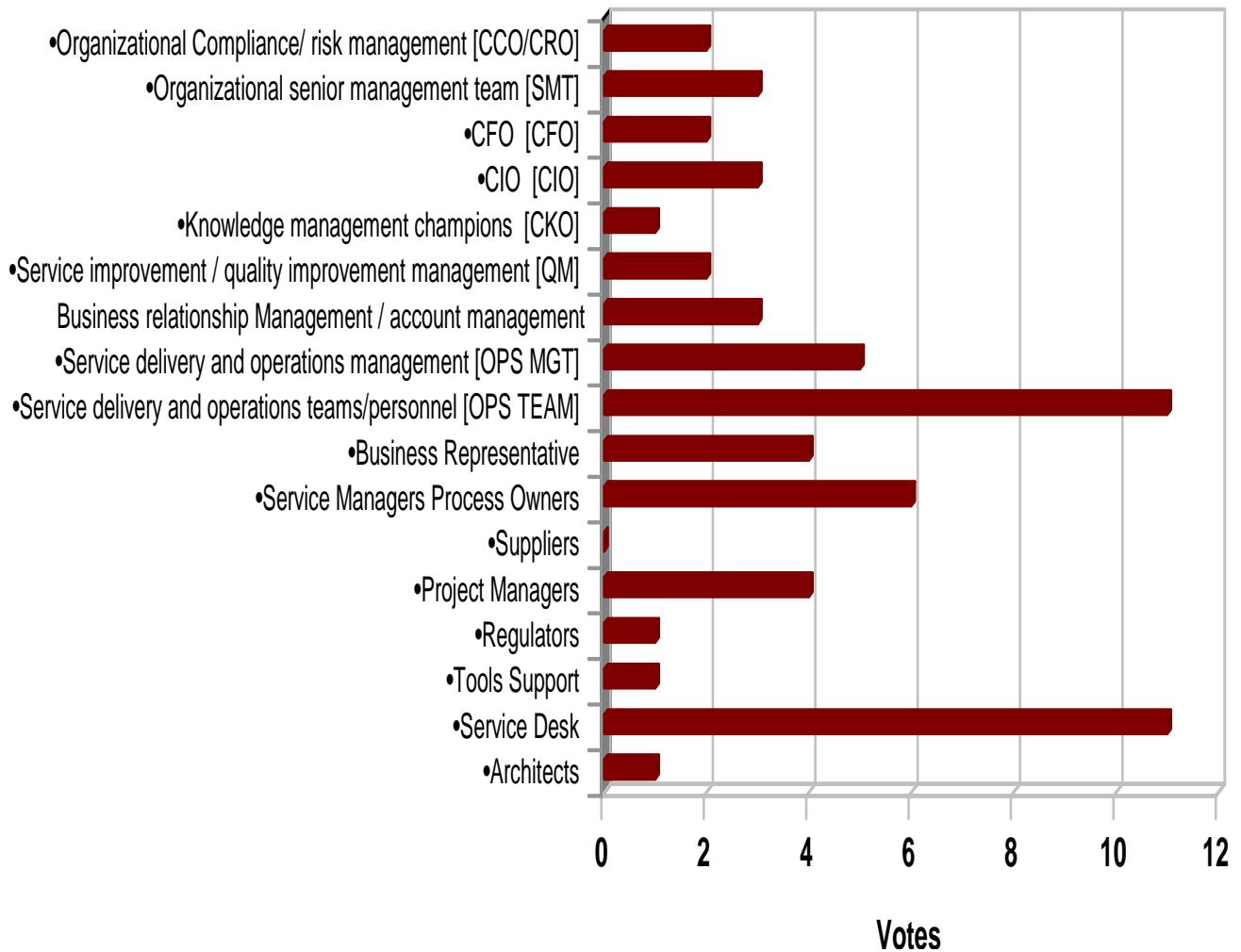
4.3 Contributors

20 contributors including representative from:

Financial Times, Fidelity Investments, Cheshire County Council, Tideway, Principia IT, BAE, Mouchel, TfL, Ericsson AB, Monetal Ltd., EADS DS UK Ltd., iCore Ltd., Cheshire Police, Bloor, Motability Operations, Plymouth City Council, GSK, KPMG, Deutsche Bank

4.4 Which Stakeholders would benefit most?

At the start of this session the delegates were asked to pick up to three stakeholders (from the stakeholder list created in John Dixons session) that would benefit the most from CMS. Each person voted individually using the interactive technology and the results were displayed immediately on the main screen for Kevin to comment.



4.5 Critical Success Factors and Barriers for Implementing CMS

Following a stimulus presentation by Kevin Holland, the delegates were assigned one of the stakeholders that would benefit most from a CMS and asked to discuss:

- What are the Critical Success Factors for your Stakeholder Group? Why?
- What are the barriers?

4.5.1 Table 1: Service and Ops Teams

4.5.1.1 Critical Success Factors

- Customer satisfaction - continued investment and support for IT
- Able to predict potential problems more accurately to reduce rework and cost
- Ability to optimise service assets and therefore reduce cost to the organisation
- Ability to respond to changing environment quickly and take advantage of business opportunities
- Meeting or exceeding OLAs/SLAs and KPIs to meet contractual/agreed obligations and reduce rework and cost

4.5.1.2 Barriers

- Time - too busy fire fighting - involvement of S&O Team in development of the CM Solution
- Silo mentality, not owned or developed here - Distributed ownership of data, accountability and authority
- Lack of trust in data - help in maintaining data up to date and accurate
- Cultural barriers - Training and education, simple to use systems.
- Perceived to be bureaucratic and non value adding - show how CMS will make their job easier, automate where possible

4.5.2 Table 2 – Service Desk

4.5.2.1 Critical Success Factors

- Speed of access
- Usability / intuitiveness of interface
- Identify changes that could have resulted in incidents
- Accuracy of information held
- Link seemingly unrelated incidents to identify cause
- Don't have to go out to users to investigate incident
- Easily update CI information at the appropriate level
- Complete, accurate and up to date info
- Access to solutions identified in similar incidents
- Keep track of release patches sent out to users machines
- Ability to quickly assign incident to team
- It is reliable and the Service Desk Staff rely on it
- Identify trends to feed back to CSI
- Identify dependencies between CI's to help identify impact
- Possibility to automate frequent tasks
- To help identify trends/problems
- Known errors and workarounds
- Change history
- Its updated immediately
- QA processes in place and monitored
- Metrics should be set on outcome

4.5.2.2 Barriers

- Lack of trust through inaccurate info
- Tool is difficult to understand, so people don't bother
- People not understanding value of accuracy
- Lack of management buy in support
- Lack of understanding or sticking to a common usage policy (i.e. categorization etc)
- Lack of process or support flow diagrams
- Not giving appropriate access so the people who need it don't have access
- Knowledge is power why share it
- Lack of formal process

-
- Lack of sufficient level of information within the system
 - lack of understanding of processes
 - Not wanting to abandon existing business processes
 - Feelings that it had no practical use, only data collection
 - Time to keep up to date
 - Not wanting to abandon existing repositories [Replicate what they get with their existing tools, or federate]
 - Measurements focused in wrong place e.g. wrap up time on call set to short so no time allowed to update
 - Selling groups the idea of controlling another group through the information in the CMS but only if they put in their information (i.e. group can reject a ticket if not checked against a knowledge base, but only if they have information put in there)
 - Training, training, training...

4.5.3 Table 3: Service Managers Process Owners

4.5.3.1 Critical Success Factors

- That the CMS provides assured quality data. because they need to measure that the process is working correctly
- For an incident manager the CSF for CMS is that it provides timely information not just timely data. Because the manager needs to be assured the incident team can act quickly and accurately to resolve all incidents.

4.5.3.2 Barriers

- Flawed processes. CMS helps by providing a feedback mechanism to help process improvement
- Lack of senior management buy-in. CMS allows multiple views of the same data to allow for different audiences
- Unrealistic expectations
- Integrity and availability of information
- Fear of accountability

4.5.4 Table 4: Service Delivery and Ops Management

4.5.4.1 Critical Success Factors

- Prioritised CIs so that only important ones are under CM
- Size appropriate to benefits obtained
- Prioritize CIs so that most important are managed first
- CI's appropriate to business needs and appropriately timely
- Accurate and up-to-date information to support decision making.

4.5.4.2 Barriers

4.5.5 Table 4: Business Representatives – CSF

4.5.5.1 Critical Success Factors

- Transparent financial and cost management

- Audit and compliance - SOX etc.
- Metrics - they can see how much value we are delivering!
- High availability and stability - no surprises!
- Forward Schedule of Change - Forecast of changes/downtime
- Improved business continuity
- Highlight risk earlier - and pre-empt.

4.5.5.2 Barriers

- Poor Data Quality
- Cost and resourcing - i.e. the business can partner in convincing other stakeholders in sustaining the journey.
- Ensuring integration of business and IT - partnership, understand business benefits and value.
- Create a training programme
- Business could help us to understand the context - e.g. geographic issues, business compliance and regulations.
- business can help gather the data - users, business services impacted, escalations, communication ...
- Deal with size of data quality issues by selecting fewer more important CIs to manage

4.5.6 Table 5: Project Managers

4.5.6.1 Critical Success Factors

- The ability to determine what will be affected by the project, based on what is there now.
- The ability to gauge the nature and extent of any changes.
- The ability to view what is available for reuse, what storage is available, licenses and so on, so that they may properly assess what is already available and what will need to be bought in.
- Allows the project manager to assess what hardware and software is available for use and fit for purpose.
- If the CMDB contains personnel data, it will indicate where there might be HR issues.

4.5.6.2 Barriers

- Resistance to change. Education and training
- Constant change.
- 'Fixing' the audit by hiding equipment.
- Fiefdoms, defended to the last man.
- Too many super heroes.
- Refusal to accept a job is finished.
- Theft of equipment that is to be deployed. - Keep in a secure environment.
- Changing business requirements.
- Personality clashes.
- Poor baselines.
- Incorrect data in any existing CM system.
- Variable quality data.
- Inconsistent terminology.
- Historical micrometric measurement of the wrong thing.

- Poor version control.
- Lack of high level support.
- Constantly changing priorities.

5 CMS Implementation Case Study

5.1 Presentation

Andrew Pieri and Mark Smith, Associated Newspapers Limited

5.2 Objectives

To gather feedback on a CMDB/CMS pilot implementation approach for a case study

5.3 Contributors

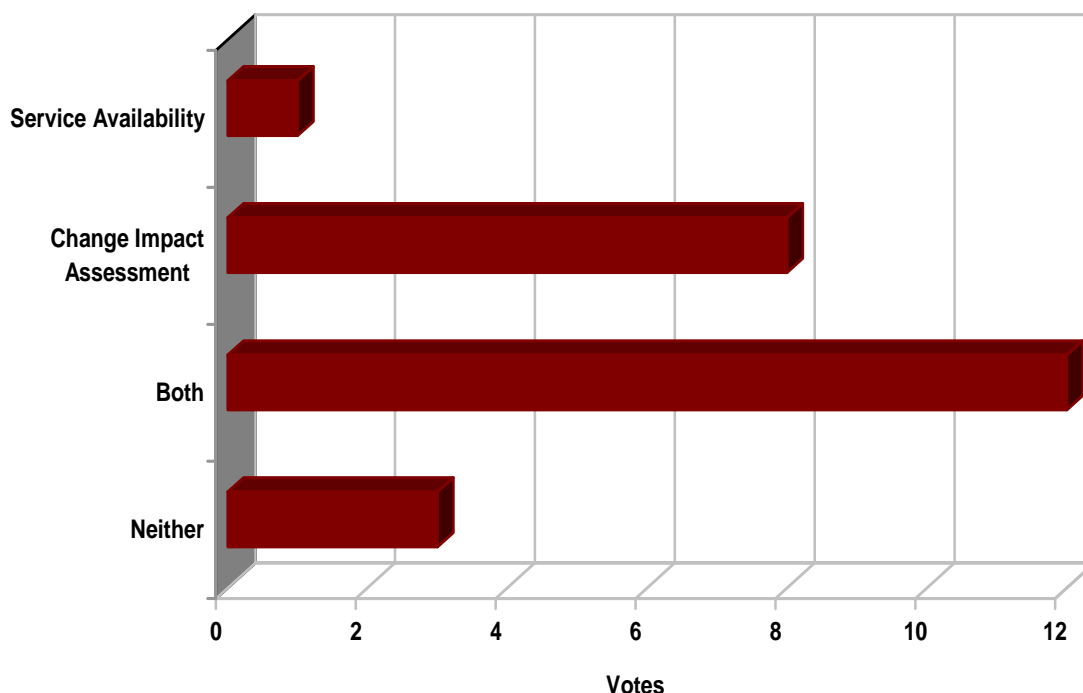
25 contributors including representatives from:

DeltaRail Group Limited, Mouchel, Cheshire County Council, iCore, O2, Capgemini – Aspire, NWDC, Plymouth City Council, Mentor IT Ltd., HMPS, Ericsson AB, Capgemini, ESA, Staffordshire Police, Norfolk Constabulary, Firescope Europe, Motability Operations, Fujitsu Services, Norfolk Police, Bytes, Telelogic An IBM Company.

5.4 Business Drivers

At the start of the session, Mark and Andrew asked the question: “How many organisations have used the following business drivers for your CMDB-CMS implementation?”

Working individually using the interactive technology, the delegates responded to the question by selecting from one of four options. The results were displayed on the main screen immediately for Mark and Andrew to comment.



5.5 What 'off the shelf solution' are you using?

Delegates responded from the floor to the question: Has anyone found an integrated 'off the shelf solution' that supports what we are trying to do? If so - what are you using?

- Telelogic and IBM Tools
- Dimensions
- Telelogic or Harvest (survey)
- Remedy
- Hornbill Support Works

5.6 Feedback

Following presentations by Mark and Andrew the delegates were invited to give feedback via the interactive technology. Working individually, each delegate was asked to consider their responses under the following headings:

- PLUS: This is what I liked about what I heard
- MINUS: These are my issues and concerns
- INTERESTING: Thoughts and insights
- QUESTIONS: Questions for the speaker and each other

The verbatim output from the group follows:

5.6.1 PLUS: This is what I liked about what I heard

- Start with a single service and build from that
- Single service approach looks good sensible, pragmatic
- Starting with a single service
- Shown to work in a always on environment
- Easy to scale from one typical service
- Single service approach and single vendor
- Starting with a single service seems a sensible and pragmatic way to start, and good to see it has worked as this has been my org's approach as well.
- Honesty about integration difficulties.
- Lessons learnt
- I liked the achievable single task approach
- Good clear presentation styles
- Agree process understanding is critical
- Don't jump in with a service provider until your sure they know your business

5.6.2 MINUS: These are my issues and concerns

- Would like to hear more about what went wrong
- Nothing about cultural change seemed very technology driven overtly so
- Not enough time to go into detail
- Integrated tool was not really integrated

- Having captured legacy data with the discovery tool do you now use discovery data or change management to keep it updated.
- What were the business reasons for one single tool
- Would have liked longer presentations with more detail
- No information on metrics to judge the level of complexity of the solution implementation
- I didn't feel the presentation really discussed the aspect of organisational change
- How much integration was out of the box - was this the difficulty?
- Automatic monitoring might not have a service view
- Would have liked to hear more about software selection process, business case and other justifications.
- The people perspective
- Presentation was a bit too summarised for my liking - was hoping for more detail on the how's.
- Do you now feel you had the right resource skills to manage vendor selection and implementation

5.6.3 INTERESTING: Thoughts and insights

- Availability was a key factor
- Interesting idea to tackle one service at a time
- Technology is by no means the whole solution
- The whole presentation was very interesting, lots of lessons learned that I can use
- Who carried out your ITIL maturity survey, like the idea that this is being checked to see progress.
- Understanding the data captured and required by each process is important
- Awareness of the criticality of IT for the core business
- The business case was described very clearly... benefits were more around incident / problem / change with CM being an enabler to it
- Process review before implementation was positive

5.6.4 QUESTIONS: Questions for the speaker and each other

- What tool did you use?
- What benefits have you seen so far and how have you been able to quantify/measure them?
- Could you clarify what the business driver(s) were please? I picked up that the ITIL review kicked off the process - but I assume that senior management weren't buying ITIL for its own sake. I also picked up that availability was the key business imperative - so how was this mapped onto the business case for CMDB? Were there any specific benefits (e.g. reduced outage) claimed and have they been achieved?
- How long did the PoC take?
- What tools did you use for the discovery and the CMDB
- Who was the vendor
- Are you able to share details of the full POC and investment case?
- We are using the same approach as you, just starting, and focus on Incident, problem and change. How did this work without release mgmt, meaning, how do you secure accuracy of data, not including Release?
- What KPIs did you set/measure?
- Data mapping - was this scripting or out of the box functionality from the discovery tool vendor?
- How did you deal with capacity management?
- Did you compromise your requirements in order to implement same vendor solutions & if so would you choose differently if you had to do it again?

-
- Would you say your data model is really your architecture definition?
 - How did you select the tools?
 - Has the cultural change kept pace with the technical change?
 - What evidence do you have that you were successful?
 - How did you involve the users / support staff?
 - What training did the users have?
 - Were there any pitfalls in choosing a single service to focus on first?
 - Was the architecture of the solution more to do with the single vendor or based on your organisational needs?
 - Which changed more the culture or the tool? Did you take the horse to the bucket or pour the bucket over the horses head?
 - How big is your Config team; how many CI's do you have and how many RFCs against those CIs? A question really on the size and scope of resource req'd to operate the function.
 - Who did you use for maturity analysis and would you recommend them?
 - Did you use a 3rd party as an integration partner?
 - Have you got a model for creating and measuring maturity levels of your processes and how did you come up with them?
 - Would you go for single tool another time?
 - What issues did you have redefining job roles to the new processes?
 - Some organisations implement change v successfully but more on the basis of heroics than a structured CMDB. Can you articulate more fully how your?
 - What where the main single difficulty?
 - Did you do any organisational changes in parallel?

6 How to improve an existing CM Process

6.1 Presentation

John Metcalfe , BCS CMSG (British Computer Society Configuration Management Specialist Group)
Deirdre Connis itSMF CCRM (Change, Configuration and Release Management Specialist Group)

6.2 Objectives

To explore how to identify failures in the configuration management process and how to improve the existing process.

6.3 Contributors

24 contributors including representatives from:

BAE Systems, Associated Newspapers, ESA, Fujitsu Services, Virgin Media TV, itSMF UK, Cheshire Police, Financial Times, Met Office, GSK, Plymouth City Council, Cargill PLC, TATA Consultancy Services, T-Systems, BAE Systems, Atos Origin, Allen & Overy, DHL IS Europe, Hornbill, Bytes

6.4 Techniques and Processes to detect failure?

John presented examples of the configuration management process failures based on the feedback from previous workshops and then invited the delegates to discuss in the table groups:

- What techniques / processes do you have in place to detect these failures?

The delegates recorded their responses using the interactive technology. Their output arranged into table groups follows...

6.4.1 Table 1

- Monitoring tools with thresholds set to provide early warnings
- Tracking / reporting unauthorised changes
- Locking down who can 'push the buttons' and release to the production environment.
- Evidence of by passing change control process
- Extensive automated testing pre release to production
- Regression testing
- Controlling developers is extremely difficult
- Implementation of a forward schedule of change
- Testing done by an independent testing function that signs off fitness for release to the production environment
- Auditing via a discovery engine as a technique
- Use of source code mgmt system that provides a configuration baseline for each release
- Testing that looks for specific problem fixes that have been incorporated into the release.... every subsequent release includes this test in its test suite
- Internal and External Auditors
- Error detection

6.4.2 Table 2

- Monitored KPIs
- Operational Monitoring tools
- Application performance monitoring
- End to End availability monitoring
- Proactive Problem Management
- Critical Incident Management regular meetings to discuss and prioritise actions to make changes to operating practices and procedures
- Threshold levels set to detect failures against SLAs before they become critical - warnings, threshold breaches etc.
- Trending on issues which regularly occur to ensure that they can be resolved prior to another failure.
- Robust and enforced change process - enforced by management but this is supported by tools in place to compare the live estate to the most recent baseline or stable state

6.4.3 Table 3

- Process audit: Audit full estate people, process, tools, and equipment. Identify non-conformances, look for root cause
- Indicators and measurements: Identify correct KPI like uptime, monitor performance against KPI. Re-assess KPI if always failing. Look for root cause.
- Monitoring of lacking capacity. Use monitoring tools for early warning. Establish history. Look for recurring issues.
- User/Customer feedback and complaints. Detecting process failures, also in management processes. Detect non-workable conditions like impossible KPIs
- Problem management, looking for recurring issues
- Test on reference environments. Check your test configuration

6.4.4 Table 4

- Rigorous Change Control
- Helpdesk
- Automatic builds from controlled access libraries
- Automatic build after checking early warning of compilation errors during development stage in the lifecycle
- Testing procedures used to test the code before releasing to the live environment
- Automatic testing for consistent testing
- Software Configuration Management Lifecycle stages
- Different defined roles and responsibilities in the SCM lifecycle
- Audit and verification procedures, including discovery techniques
- Automated alert systems and dashboards
- Build processes regularly audited
- Change Management processes with affective risk and impact analysis
- Requirements through design and code compliancy matrix
- Gathering requirements at the early stages of the project and prioritizing those requirements

-
- Build logs
 - Incident and Problem Management will detect and record all Service Outages and Known Errors and relate back to the Service Catalogue for impact analysis

6.4.5 Table 5

- Defect management - covers pre-production and production environments.
- Employed lean techniques - process mapping, identifies where gaps are in process and implements improvements, value stream improvements and so on.
- System and server monitoring - identifies 'hot spots' where servers are getting near capacity.
- Production monitoring - identify where we expect to be against where we are not getting what we expected, indicating possible errors in source data or translation.
- Pro-active problem management - trend analysis on incident reports, including the resolution code. Identify location and possibly people at the heart of the problem.
- Getting customers to report where they are having troubles when they occur, rather than just complaining to each other.

6.5 Techniques and Processes to detect failure?

Deidre then presented examples of the configuration management process failures based on the feedback from previous workshops and invited the delegates to discuss in the table groups:

- What Techniques / processes do you have to resolve problems / improve configuration management?

The delegates recorded their responses using the interactive technology. Their output arranged into table groups follows:

6.5.1 Table 1

- Inclusion of a PTM (physical technology model)
- Verification of accuracy of CMDB content
- Understand the service value
- Enforce the CM process
- Following process is NOT optional
- Config audits
- (see answers to previous question - many contained the solutions)
- Defined documented process, with hand-offs clear
- Post implementation review/check on all changes that what was implemented matches what the change said it was
- Understand the process that collects the data and revise it as necessary
- Ensure there is an owner for the data and map it
- Use of source code mgmt system.... use of deployment tools in order to remove / reduce manual interaction

6.5.2 Table 2

- Audit reports which shows when key pieces of information are missing in the database - minimum requirements for input of a CI and then escalated back to originating team if all information is not available

- Configuration management agents running on servers and reporting back to a central point. this then enables automatic alignment to a service, if something has appeared against a service overnight for example then they appear in an exception report which can be checked against change records
- Stakeholders within the IT department own the record and are responsible for the updates to it. When an audit is then undertaken (discovery tools and similar) and something has changed then the responsible individual or team would need to update the record if anything was missing or had changed

6.5.3 Table 3

- Assess process fitness to deliver. Identify failure and address it. Could require training.
- Assess used tools. Identify failure and address it.
- Assess equipment, replace failing units.
- Compare database and systems and align them if needed.
- Use knowledge of working team to trigger suggestions and improvements
- Consult Industry experts

6.5.4 Table 4

- Rigorous Change Control
- Build logs.
- Continuous process assessment
- Make Service Owner accountable for CIs and their relationships
- Functional and physical audits of CIs, Processes, Tools and databases.
- Review processes on a regular basis
- Audit and Verification processes and procedures
- Weekly Status Reports
- Use of MRIs or CISRs (Status reporting)
- Metric Reports to detect trends for Problem and Incident Management
- Regular review of process, issues and status with users and customers
- Discovery used to ensure data accuracy for lower level attributes on CIs
- Process for communicating inconsistencies with CI data
- Change Requests and approval for inconsistencies or changes to be made in the CMDB
- Improved publication of data - good and bad.
- Defined roles and responsibilities with delegated and acknowledged ownership
- Roles and Responsibilities for individual Stakeholders
- Track back Release Records to the Service Catalogue, Application and Infrastructure

6.5.5 Table 5

- Open user forum/Special interest groups formed to share knowledge.
- Mandatory six month review of process.
- Benchmark against established good practice.
- Auditing for capability and maturity to ensure maintenance of uniformity of application.
- Confidential reporting line on which people can leave anonymous 'tip-offs' of things that have/are now/will be going wrong.
- Review of expected outcomes against actual outcomes - Did the CM system deliver? Did we encounter the problems we thought we would?

7 Service Management Requirements for a CMDB/CMS

7.1 Presentation

Ian Salvage, IBM

7.2 Objectives

To present and approach to determining the service management requirements for a CMDB/CMS and identify the common requirements for service management.

7.2.1 Contributors

13 contributors including representatives from:

Teliasonera, EDS, O2, Telelogic An IBM Company, Unilever, DeltaRail, Fujitsu Services, TfL
EADS DS UK Ltd., Lea-Cox Associates

7.2.2 Key and common service management requirements for the CMDB/CMS solution?

At the start of the session Ian asked the delegates to consider: What are the key and common service management requirements that we need to consider for the CMDB/CMS solution?

The delegates recorded their responses using the Interactive Technology:

- What Services are we going to manage?
- Service mgmt process owners
- Impact assessment / analysis
- What service management infrastructure do we require?
- Shall provide accurate reports in a timely fashion
- Supporting management decisions
- Data ownership
- Accuracy & correctness of data, available in a timely manner.
- Shall be able to query the data and create ad hoc reports
- Collated and related data
- Reporting requirements
- Ease of access and interpretation
- Trustworthy data
- Data availability and accuracy
- Who are the service stakeholders?
- Data visibility / restrictions
- Organisations strategy for sm
- Need to be able to determine quickly what is out there so CMS needs to be updated and verified regularly
- CMS should facilitate links with change management
- The kinds of data that will help make decisions

7.3 Feedback

Following a presentation by Ian the delegates were invited to give feedback via the interactive technology. Working individually, each delegate was asked to consider their responses under the following headings:

- PLUS: This is what I liked about what I heard
- MINUS: These are my issues and concerns
- INTERESTING: Thoughts and insights
- QUESTIONS: Questions for the speaker and each other

The verbatim output from the group follows:

7.3.1 PLUS: This is what I liked about what I heard

- Good to see some examples of use cases for specific functionality
- Sound and sensible approach
- Coordinated approach to structuring the CMS / CMDB
- A logical structure - but where is the overall approach
- Like the idea of work-shopping the requirements for CMDB, being driven from business need

7.3.2 MINUS: These are my issues and concerns

- For extant systems that are already under resourced it would be extremely difficult to get the required buy-in and commitment from Management and staff for this type of approach
- Need additional skill sets to do analysis - who may be focused on software and not service mgt
- Really talking about the architecture of the CMDB and CMS - more than just requirements!

7.3.3 INTERESTING: Thoughts and insights

- Making the use generic cases available may prove to be useful
- I like the concept of being able to structure the development of the CMS as a manageable project, but this is the first presentation I have seen that gives practical suggestions on how to do that.
- Not only involve config mgrs and service managers but include in the implementation approach also skills as information analyst and information architects.
- Good introduction to the V-model for the CMDB / CMS
- A CMDB costs money. They don't come free.

7.3.4 QUESTIONS: Questions for the speaker and each other

- What other techniques are effective for finding SM related requirements? How effective are Use Cases compared to other methods?
- When other process requirements are identified, there needs to be a push back from CMDB to ensure data ownership and maintenance?
- Are 'Use cases' a generic format used across the industry, or are they created in house to be business specific?
- How do you manage the constant demands for status reports, that something happen, that a change or something, heck, anything come from the amount of money and time being spent on the activities of defining and developing the CMS?
- What are the repeating themes that come from the workshops?

-
- Is this a standard approach IBM take when considering Service Management/CMS requirements? Or is it localised to particular clients?
 - Meta data requirements from wider organisation?
 - How to balance the managerial and operational requirements?
 - There are requirements to populate the CMDB and reqts that the SM disciplines have of the CMDB. Should these be done at the same time, and are CI Types reqts or are they solutions to business reqts.?
 - How do you obtain buy in from clients when discussing and agreeing req/design?
 - I think this is based on RUP which is traditionally Software - how can you sell this approach to Service Management and operations who are usually more product/PRINCE focused?

8 Service Asset and Configuration Management Visions and Strategies

8.1 Presentation

Mike Tomkinson, CM Beacon, BT Global Services

8.2 Objectives

To get feedback on BT Operate's Configuration Management Transformation vision and produce a prioritised set of features for setting a vision and strategy for implementation

8.2.1 Contributors

11 contributors including representatives from:

Unilever, NWDC, DeltaRail Group Limited, BT, Serco NTCC, Renault UK, EADS DS UK Ltd, HMPS, Principia, Fidelity Investments

8.3 Feedback

Following a presentation by Mike the delegates were invited to give feedback via the interactive technology. Working individually, each delegate was asked to consider their responses under the following headings:

- PLUS: This is what I liked about what I heard
- MINUS: These are my issues and concerns
- INTERESTING: Thoughts and insights
- QUESTIONS: Questions for the speaker and each other

The verbatim output from the group follows:

8.3.1 PLUS: This is what I liked about what I heard

- A clear positive approach - obviously tying in good ITIL V3 and Maturity Model structure
- Presentation grounded in reality 'warts n all'
- That roles and responsibilities of Configuration team should be defined upfront, rather than after the tool has been deployed
- Showed us from real life that you have to have a dedicated team looking after CM, it's not just something that can be done by a few people in their slack time.
- Some common difficulties and thoughts generated
- That other companies are experiencing similar difficulties
- Relationships with customer's CMDB 'above the line/below the line'

8.3.2 MINUS: These are my issues and concerns

- Nothing new in this presentation - I feel like I've seen it several times already in the past couple of days.
- You talked of culture change but the CM team roles remained the same - the new config management challenges require new roles driven by the skill sets needed to create maintain and understand end to end. The Config team would begin to include operations and technical support skills as well as business process and business application knowledge. My point is that people need to feature more

8.3.3 INTERESTING: Thoughts and insights

- Show the people change tied to functionality and tooling change. show how the skill sets and competences and behaviours underpin the roles and how they mature and change
- We need to formally identify configuration managers in the organisation - different to the config mgmt process mgr. We have done this successfully for incident & problem. Will really move CM to a new level quite quickly if we do it for config.

8.3.4 QUESTIONS: Questions for the speaker and each other

- How long did it take from the decision to implement a CMS to getting tangible benefits?
- When talking about a CMDB, inevitably networks/servers etc are mentioned. Is there worth in employing a CMDB in an environment where all hardware and network elements are contractually supported by third parties and the change is restricted to applications/functionality etc.
- How many legacy systems did you have to extract data from and what troubles did that give you?
- How did you get Management buy in, as it is difficult to give definitive, i.e. financial, benefits?
- When using a level of automation to populate the CMS/CMDB, how do you prevent people from relying too heavily on it? e.g. "I don't need to update the CMDB because the auto-discovery tool will find it!"
- Do you have stakeholder sponsors for each of your dependencies?
- Is your project part of a program and is there shared resources for this - e.g. and IPSO plus a budget!

8.4 Your Vision

Mike went on to challenge the group:

- If you had to create a vision what would be your starting point?
- What would be the key activities to create and implement your vision?

Working in table groups the delegates discussed the questions recording their input using the interactive technology.

8.4.1 What would be your Starting Point?

- Your end point!
- Our customers' needs/the business's needs
- Determine what the customer wants us to deliver in what timeframes.
- We have a lot of (separate) individual CMDBs for different sets of nuts and bolts. we are also building a service catalogue.
- To sell the vision why the other processes will be flawed and not deliver full benefits without CMS
- A point in time - e.g. in 2014 we will...
- Understanding what it is we're trying to achieve
- End point (from 6) - join catalogue and CMDBs
- To drive the vision - milestones - smart ones
- A project plan
- Recognition of rapid growth and potential volume/scale increase that would not be able to be managed with existing situation
- Define the drivers for the process - don't let the tool drive the process.

8.4.2 Key activities to create and implement your vision?

- Study best practice

-
- Ensuring that the current and future needs of the organisation are understood
 - Establish where our present systems don't deliver.
 - Benchmark against competitors
 - Restricted scope growing slowly to meet the full required scope over time
 - Only hold what is needed
 - Ensure that the vision is translated into SMART objectives: Specific, Measurable, Agreed, Realistic and Time specific
 - Measure and persecute data owners
 - Highlight process conformance that impacts CMS
 - A feasibility study and PoC to help market and demonstrate the vision goal or at least set some scope
 - Try to kill the attitude that tools are the solution.
 - Identify existing process to begin with
 - Identify configuration managers. Build from the service down, to close the gap to CMDBs. consider also costs management, license management ...
 - money, money, money - put a value to everything
 - Consolidated data and a clear process

9 How do you populate your CMDB?

9.1 Presentation

Harvey Davison, Lloyds TSB

9.2 Objectives

To identify and debate issues relating to populating a CMDB

9.3 Contributors

35 contributors including representatives from:

Principia, Cheshire County Council , TfL, Staffordshire Police, Renault UK, Mouchel, BAE, JPMorganChase, GlaxoSmithKline, Plymouth City Council, Allen & Overy, Haringey Council, HM Land Registry, FireScope Europe, Friends Provident, iQuate, May Gurney Ltd, Cargill PLC, Friends Provident, University of Oxford, GSK, Plymouth City Council, KPMG, Mediatek Wireless, Ernst & Young Global, Atos Origin, EDS, HMPS, ING Bank (NL), Unilever, Motability Operations, Moore Stephens

9.4 Where are the gaps or weaknesses in your process or data / information?

Following Harvey's presentation, he challenged the group to consider the question: "Where are the gaps or weaknesses in your process or data / information?". He offered the following categories into which the delegates recorded their responses using the interactive technology:

- Identification – data type = Service
- Identification – data type = System
- Identification – data type = Logical host layer
- Identification – data type = Hardware / physical host layer
- Identification – data type = Other
- Categorisation – Details
- Categorisation – Status
- Categorisation – Relationships
- Categorisation - Other

9.4.1 Identification – data type = System

- Do not have agents running on all servers
- Naming standards
- Having a complete inventory of your assets
- Hardware - silo log their own information for the data centres in spreadsheet. No other teams have sight of this.
- Identifying your services that your systems support
- Access to legacy and complex systems often means that coverage of the full estate is extremely difficult
- What is included in the system
- Identifying accurate lists for applications and their status and owner
- Tracking the software is an issue and from a licence perspective

- Identification of system owners is fraught
- What is a system?

9.4.2 Identification – data type = Logical host layer

- VMWare servers automatically being moved from farm to farm.
- Ownership -service vs. systems
- Problems of controlling virtualised systems
- Business continuity

9.4.3 Identification – data type = Hardware / physical host layer

- No automatic process - difficulty getting staff to follow update process
- Hardware catalogue is on big bucket of servers, networks
- Desktop auto import ok, location by IP, services used difficult - but not needed?
- Hardware may not always be one server - vmware could be issue
- ownership - hardware owners vs. system owners vs service owners
- Tracking install of agents and making them work over the Internet
- Servers, switches, links, printers, our tool has to get at via export from x-management system to excel, then import using excel csv format, so relationships get lost.
- No centralised location for holding physical assets

9.4.4 Identification – data type = Other

- Identifying software and versioning running on server estate
- client requires items like PDAs to be captured, but this is difficult to maintain, same problem with IP addresses
- Where a CI is dependant upon multiple CI's but not necessarily all at the same time - e.g. This server or that server is up but both don't have to be.
- Attributes - which ones to records. If you want it, how are you going to maintain it.

9.4.5 Identification – data type = Service

- Business does not know its own services
- Identifying What is a service at the top level
- Project doesn't map all relationships
- Understanding what a service is - as we don't have service contracts for each service
- Identify service relationship
- Understanding who the users are of each service
- Difficulty in identifying our internal services
- Business don't know which services they use
- Difficulty in establishing ownership of our internal services
- Mapping devices to services, high priority, cannot be automated
- 1 Defining a service varies according to whom you talk. Ops Manager, Service Delivery Manager, Users.....
- Maintaining relationships and the ownership of them
- Understanding who to inform (specific business users) of downtime/availability of services
- What is defined as a service within your organisation - unique issues and key capabilities of specific services
- Service relationships to services and systems

9.4.6 Categorisation – Details

- Data quality
- Don't have good attribute information or not sure information is correct. Don't have good data quality.
- Data accuracy
- Ownership and governance
- How do you identify critical applications
- Conflict over system and service categorisation by business area, function or personal opinion
- Due to some items controlled by 3rd parties, a lack of confidence in the quality of data
- Understanding and defining a CI and attribute level that appeals to and will work for IT and the business
- Outsourced infrastructure
- Audit of all details both outsourced and in-house - how to co-ordinate

9.4.7 Categorisation – Status

- Decommissioning process, it's switched on, but people don't want to risk turning it off
- Unknown status - ownership by business users
- Do you record assets separately that have left the organisation, i.e. something other than retired (disposed of maybe)
- Don't know the status of assets - servers, workstations, facilities.
- Operational or functional demonstrator? - can be difficult to ascertain.
- Status of changes against each application
- At what stage is the status of each CI determined - relationship with change / problem/

9.4.8 Categorisation – Relationships

- No current tool
- Identifying dependencies between applications/hardware/people
- Can't audit relationships by a tool
- 1 Relationship definition, finding what they are is difficult and finding someone or some source for the definition is worse.
- Understanding the implications of incorrectly defining relationships
- Difficulty with depth of analysis. e.g. relationships with customised objects
- CMDB viewed as an asset database only. people don't understand importance of defining relationships
- Quantifying where do roles fit into relationships between assets / facilities. e.g. we had a fire - the operate team had to evacuate without their laptops - service had to continue
- How can you keep track of business services and the infrastructure they run/rely on.
- understanding/knowing the parent/child structure - which is which
- Investment required to set up, challenge of setting up and controlling going forward
- How do you know that all relationships are defined - when do you stop.
- A lot of the information is in people's heads and it is difficult to get rid of the hero culture
- Identify roles within the HR system to aid user admin and import to CMDB

9.4.9 Categorisation - Other

- Measuring the wrong thing performance not outputs
- Tool driving the process
- Occasional senior mgmt intervention bypassing controls/process to shoehorn change to meet 'business need'

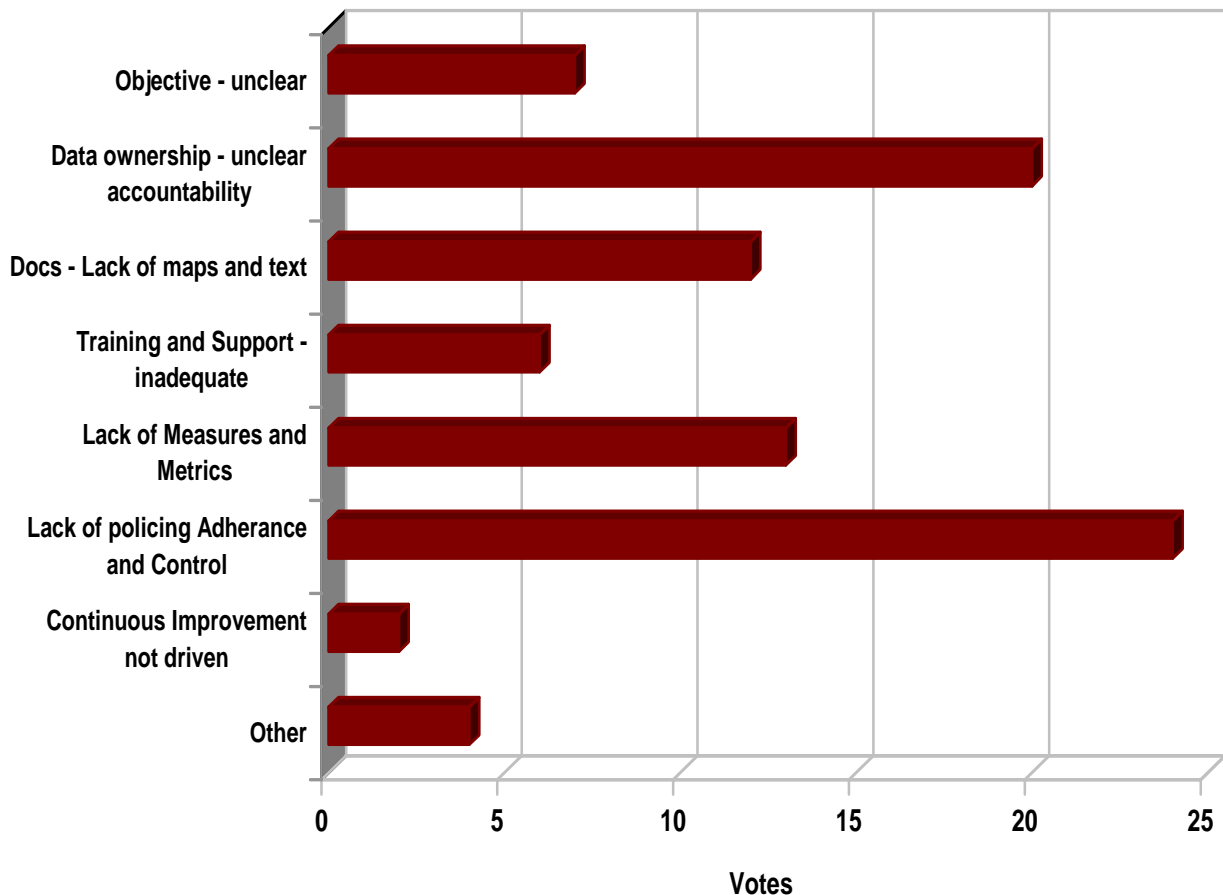
- Not understanding how the CMDB can help poor manual processes without reluctance to a culture change
- Identification of 'master repository' for data where CMDB is taking data from another application - which one leads?
- What categories should I design in?

9.5 What are the top 3 weaknesses in your manual approach?

Harvey went on to consider the top three weaknesses in their manual approach. Using the interactive technology each person marked up to 3 weaknesses from the following list:

1. Objective - unclear
2. Data ownership - unclear accountability for data ownership
3. Documentation – lack of maps & text
4. Training & Support – inadequate
5. Measures & Metrics – lack of process metrics / KPIs
6. Adherence & Control – lack of policing
7. Continuous improvement – risks/issues/improvements not driven
8. Other

The results were displayed immediately on the main screen for Harvey to comment.



9.5.1 Other Weaknesses

The delegates selecting “other” listed the following other weaknesses:

- Not yet set up, currently designing CMDB
- Politics
- Too many processes allowing change outside of the CMDB domain

9.5.2 Key Inhibitors and Actions to overcome

Harvey finished his interactive session by asking the delegates: “What are the Key INHIBITORS and what ACTION will you take to overcome them?” The delegates brainstorm their responses using the interactive technology.

- Lack of management buy in - no vision for Config Management role
- Project Management
- Money - Budget
- Company culture
- Lack of process and methods of introducing process
- Lack of knowledge around process engineering.
- Management buy-in (standard ITIL)
- Lack of understanding of value of CMDB
- Designing what is to go into the CMDB, types AND scope. Investigating and proposing.
- Understanding what services we provide to the business - Customers to define the services
- Lack of skills, resources(time & people)
- Company culture especially in global organisations - no one way of doing things
- Awareness of what the CMDB is there for.
- Too much involvement at top level management and not enough inter action with staff who actually know what's going on and do the job!
- Resistance to change. E.g. long standing members of department set in their ways
- Lack of skill set within Service Delivery team
- Management commitment - address the right people to get buy in
- Process conformance - Highlight non conformant individuals
- Lack of resources/time
- Matching user requirements with capabilities
- Process documentation - audience specification need different variations
- Organisational culture (complex org.) - where do you start?
- Present a proposal based on learning's from the conference and get buy-in from clients
- Resource - break down and identify key stakeholders and what they require and prioritise cant do all at once
- Geographical spread
- Lack of skill to deliver results - need to expand training
- Process understanding and adherence - find novel solutions
- Management team don't buy in to the process until they are scorecarded

-
- CMDB maintenance perceived as being more bureaucracy
 - Obtaining a consensus of agreement, especially from developers
 - Stakeholders drowning in current workload can allocate no time for additional projects. -summarise relevance and document benefits. provide them with snapshot of progress plan with simple go/no go request

10 Bringing the CMS to fruition

10.1 Presentation

Mark Bools, Principia IT

10.2 Objectives

To explore the approaches for bringing the CMS to fruition.

10.3 Contributors

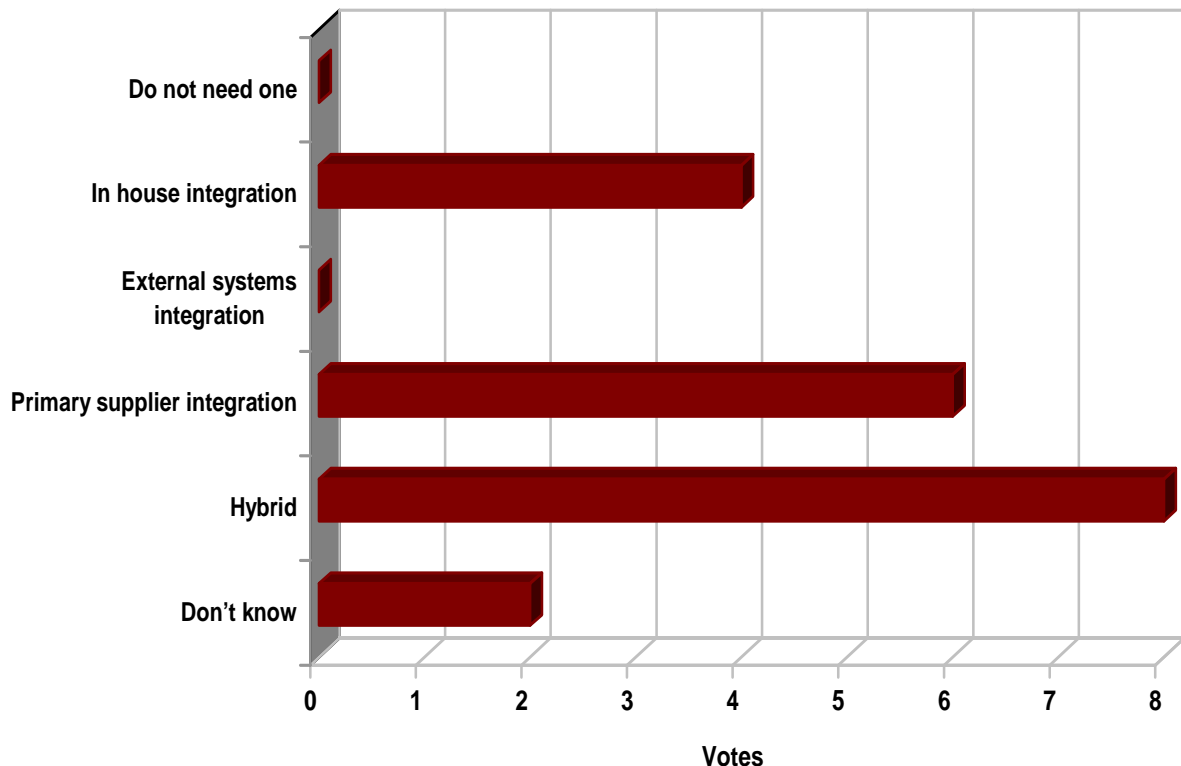
17 contributors including representatives from:

ING Bank (NL), Staffordshire Police, DeltaRail Group Limited, Met Office, Mouchel, Haringey Council BAE Systems, FireScope, BAA, Plymouth City Council, Nottingham Trent University, Motability Operations,

10.4 Which of the following strategic approaches would be most suitable for your organization to achieve an integrated CMS?

Mark opened his session with a question to the delegates: "Which of the following strategic approaches would be most suitable for your organization to achieve an integrated CMS?" Working individually each person selected one of the following options recording their vote using the interactive technology.

- Do not need one
- In house integration
- External systems integration
- Primary supplier integration
- Hybrid
- Don't know



The chart shows the results (of a subsequent vote) after Mark clarified the terminology.

10.5 Key requirements to achieve an integrated CMS?

Mark went on to ask the delegates to consider each strategic approach and respond to the question: "What are the key requirements (for each approach) to achieve an integrated CMS?" Their output was captured via the interactive technology.

10.5.1 In house integration

- Apps etc all on same platform; equal infrastructure
- Need to understand the problem.
- Long term financial support and resource
- Perform an entire life cycle development.
- Ensure that there are sufficient skills in house to deliver the solution.
- Understanding scope of integration requirements
- Scope the requirements before we start the project
- Think about total cost of ownership, including keeping the knowledge of how it works within easy reach.
- Financial requirements - in house resource is more cost effective
- All involved pulling in the same direction.
- Establishing a common naming convention

-
- Specialist skills and trained personnel
 - Good documentation
 - Realistic timescale
 - Adequate supporting tools
 - Business case and business sponsorship at a high enough level.
 - Knowledge and skills
 - Adaptability of data processing and reporting tools
 - Stakeholders need to be identified and evolved from the start
 - Good project management collaborating with in house technical team
 - Buy-in to the finally agreed scope, which might end up as a compromise or multi layer the available views. e.g. Operational Services linked to form a User Service. e-mail + Citrix + Web + X = Standard Desktop Service.

10.5.2 External systems integration

- Clear objectives and requirement.
- Project Management
- Clear description of systems to be integrated
- Follow standard project management procedures as well as normal project phases like DTAP.
- Clear definition of outputs required
- Know what you need know and what you might require in the future
- Bring test managers in right from the start.
- Clear definition for the external agency to work to.
- Clear statement of processes
- Involve key-users and their management right from the start.
- Bring experienced people on board your project team.
- Business case and sponsorship at a high enough level.
- Adequate training of in-house staff & knowledge transfer at end of project
- Think big start small
- Acceptance of what the external organisation is telling you.
- Dig deep first then widen scope
- A common data dictionary and ruthless rationalisation of the data against that dictionary.
- Normal project management good practice applies - SLAs, requirements, etc.

10.5.3 Primary supplier integration

- Flexible and well established primary supplier
- Tool support
- In house skills and ongoing training programme
- Clear contractual agreements; KPI's, SLA's etc and OLA's within internal operational teams
- Who is the main customer here?
- Not convinced this will ever work.
- A minimum in house intelligence to work with supplier to get what the business really needs
- Trust!

-
- Thorough due diligence on the vendor and their market position. Understand their outlook for the future and ensure they are clear on yours.

10.5.4 Hybrid

- Either a very good Fed-CMDB integration point/portal/import or all use the same system.
- Define CMDB project scope and deliverables clearly. Lot of time manual effort for manual mapping, ongoing roles are not factored. Cost associated with these is not included and projects stopped in between. No wonder 70% of worldwide CMDB project failed.
- Clear set of agreed standards and processes
- Building CMS architecture based of functional requirements, based on multi-vendor products and delivering it and estimating cost structure and ROI is a challenge.
- Best practice from ITIL V3 are at high level and customer struggle to define functional requirements, so they do not know what is best practice and where to go. for example: how does Forward schedule of change report should include?

10.5.5 Questions

- Which do you recommend?

11 Selecting CMS Tools

11.1 Presentation

John Metcalfe, Mentor IT Ltd

11.2 Objectives

To discuss how to select tools for the CMS

11.3 Contributors

11 contributors including representatives from:

Axios Systems, NWDC, BAE, Capgemini, Principia, HMPS, Plymouth City Council, DeltaRail Group Limited, ESM

11.4 What is the scope of the tools selection process?

John invited the delegates to discuss what the scope of the tools selection process considering their responses in terms of:

- ORGANISATION: What is the scope of the tools selection process?
- PROCESS: What is the scope of the tools selection process?

11.4.1 ORGANISATION

- Information for the various stakeholders
- Support Impact assessments
- Easy-to-use
- Business users
- Development teams
- Existing DBs
- Defect tracking/Help desk- The ability to assign defects to revisions, to identify problematic revisions.
- release manager
- What is the compelling business reason for doing this?
- How can you identify the scope of tools until you have defined the overall goal
- Help desk
- Technology to support Discovery, Reconciliation with CMDB, Integration with Change and Incident, Role Based Access
- CM team - build & release
- Stakeholder buy-in.
- Service management
- We are working for a great bank in Swiss
- Who is the chief stakeholder/sponsor in the business
- Project Control

11.4.2 PROCESS

- Change management
- Problem management
- Incident Management
- Configuration management
- Risk management
- support of core processes, yet expandable
- Supporting decisions
- Release management
- Procurement
- Asset management
- management information (business strategy)
- Change, Config, SLM, Availability management integration
- Reporting functions and adaptability
- Finance!
- Are these processes aligned to recognisable/stated business goals?

11.5 What are the common requirements for CMS tools?

John then invited the delegates to brainstorm: “What are the common requirements for CMS tools?”

- Easy to use
- Good reporting facilities via a good GUI
- Accessibility (who, when, how)
- Present the appropriate view to the appropriate user.
- Scalable
- To maintain service structure
- Distributed
- Able to baseline environment and document change
- Baselineing
- Web based/cross location access
- To provide graphical service and change impact view
- Data integrity (possibly across multiple data sources)
- Integrated defect tracking
- Maintain the associations between CIs
- IDE and other tool integrations
- Auditable
- Version control
- Flexibility
- To provide authoritative source of data to incident, problem and SLM management tools and monitoring tools
- Integration - can I integrate several data sources, reporting tools, etc.) through the same presentation layer

-
- Easy to Update workflows
 - Create one version of the truth that underpins the IT service to be delivered
 - Good disaster recovery story
 - Consistent in structure.
 - Flexibility in report generation
 - Support different processes, e.g. agile
 - To provide role based access to control CI's
 - Administrative functions - backup/restore, failover, etc.
 - Liked by users - don't get in the way
 - Cheap
 - Training
 - Rights of user changes to data
 - Keeps meta-data on the CIs and surrounding processes.
 - Reliable - doesn't crash or lose data
 - To provide reconciliation engine to federate data from multiple sources
 - Reliability and confidence with the data held
 - Good support
 - Roadmap for future developments
 - Supports the business need.
 - Provide different views of the same data for different functions
 - To provide CI's change history
 - Low overhead for administration
 - Restricts who can do what to a sub-set of the full functionality that is applicable to that user.
 - Verification of data via discovery tools
 - Out of the box integrations to discovery tools
 - Good security model - flexible for different users
 - Displays benefit to the business
 - Role based access controls
 - Cheap
 - Ensures that multiple locations, devices or connections per user are displayed
 - Allows metrics to be unobtrusively collected
 - To maintain multiple state for CI based on life cycle service design, transition to service operation
 - Visible benefit to its introduction and use.
 - Provides foundation for creating and controlling standard service delivery policies throughout organisation
 - Easy to install and configure
 - To provide federated view of service based on incident and capacity data
 - Visual traceability / linking for supporting change analysis
 - Links to planning and requirements for status tracking
 - Ensure that vendor will put your enhancements into their standard product
 - Links to QA/testing tools for lifecycle
 - To provide workflow to maintain CI lifecycle integration with change management
-

11.6 Feedback

Following a final presentation by John the delegates were invited to give feedback via the interactive technology. Working individually, each delegate was asked to consider their responses under the following headings:

- PLUS: This is what I liked about what I heard
- MINUS: These are my issues and concerns
- INTERESTING: Thoughts and insights
- QUESTIONS: Questions for the speaker and each other

The verbatim output from the group follows:

11.6.1 PLUS: This is what I liked about what I heard

- Liked the 3 stage approach
- Confirmation I am on the right path
- The presentation set out a clear and usable process for getting a CMS tool.
- Use of use cases
- Liked stepwise approach
- Demonstrated a clear and logical approach
- Pleasing to see that some of the actions recently taken are mirrored in the presentation. Adds (a little) confidence that we're heading the right way
- Good presentation
- The presentation has covered much of the ground that we're covering now, which is a good indication that we're going in the right direction, but also gives some hints about where we're going and what to do about some of the problems we're likely to encounter.
-

11.6.2 MINUS: These are my issues and concerns

- No news, is just a standard eval-Process
- Knowing what the requirements are - big organisations deliver 'successfully' every day - how do you convince them they need a centralised tool for stuff they manage in their silos
- Very little on business culture and politics - very technical focus without clear links to business value

11.6.3 INTERESTING: Thoughts and insights

- Can be difficult to manage political process!
- Some vendors much more political than others.
- Issues when restoring following DR on your primary CMDB hardware that has links
- I like the concept of there being too much information on which to make a decision. Generally, management insists on having a huge amount of information before it will make a decision.
- Tom Gilb presentation had some useful thoughts on quantifying objectives and requirements which can be applied to tool selection

11.6.4 QUESTIONS: Questions for the speaker and each other

- Do you tell the vendor that you intend for them to do a demo when the RFI is issued, or do you "surprise" them with it?
- If you are looking to a multi-vendor solution how would you advise modifying the process?
- A CMS is a big thing - can you use a stealthy approach and bring in parts of it at a time without anyone noticing?
- How to address organisation culture impact on CMDB project
- Link between business value and the CMS deliverables still appears tenuous

12 What works and what doesn't?

12.1 Presentation

Shirley Lacy, ConnectSphere and Ian Salvage, IBM

12.2 Objectives

To provide a list of what works and what doesn't work for the implementation of configuration management and the CMS

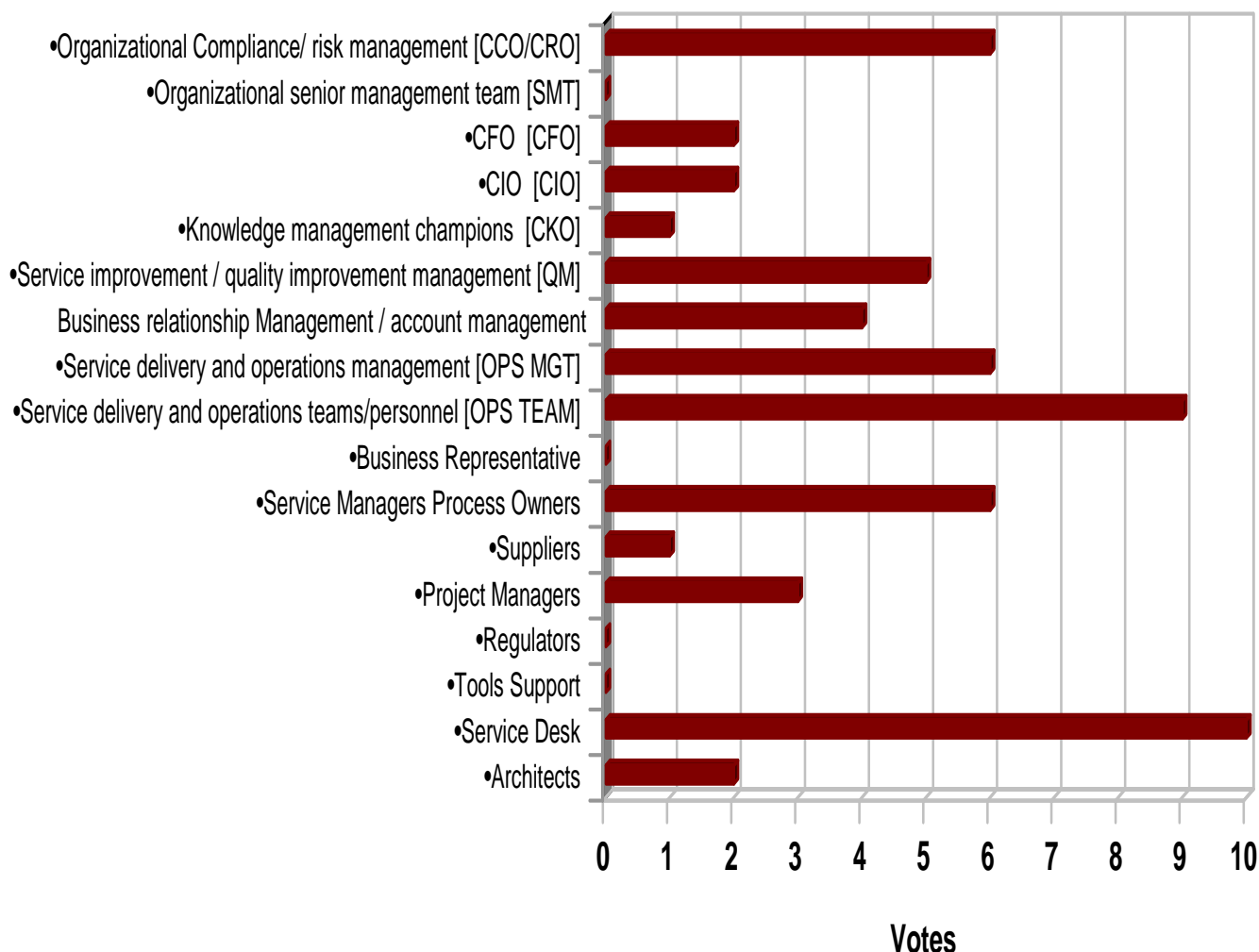
12.3 Contributors

20 contributors including representatives from:

Met Office, Mentor IT Ltd, GlaxoSmithKline, ATSC, DeltaRail Group Haringey Council, University of Oxford, EDS, Eracent, May Gurney Ltd., Fidelity Investments, Bytes, O2, DHL, Plymouth City Council, Prudential

12.4 Which of the following Stakeholders would benefit most from CMS? (Tick your top 3)

At the start of the session Shirley and Ian asked the delegates to repeat a previous vote picking up to three stakeholders (from the stakeholder list created in John Dixons session) that would benefit the most from CMS. Each person voted individually using the interactive technology and the results were displayed immediately on the main screen for comment.

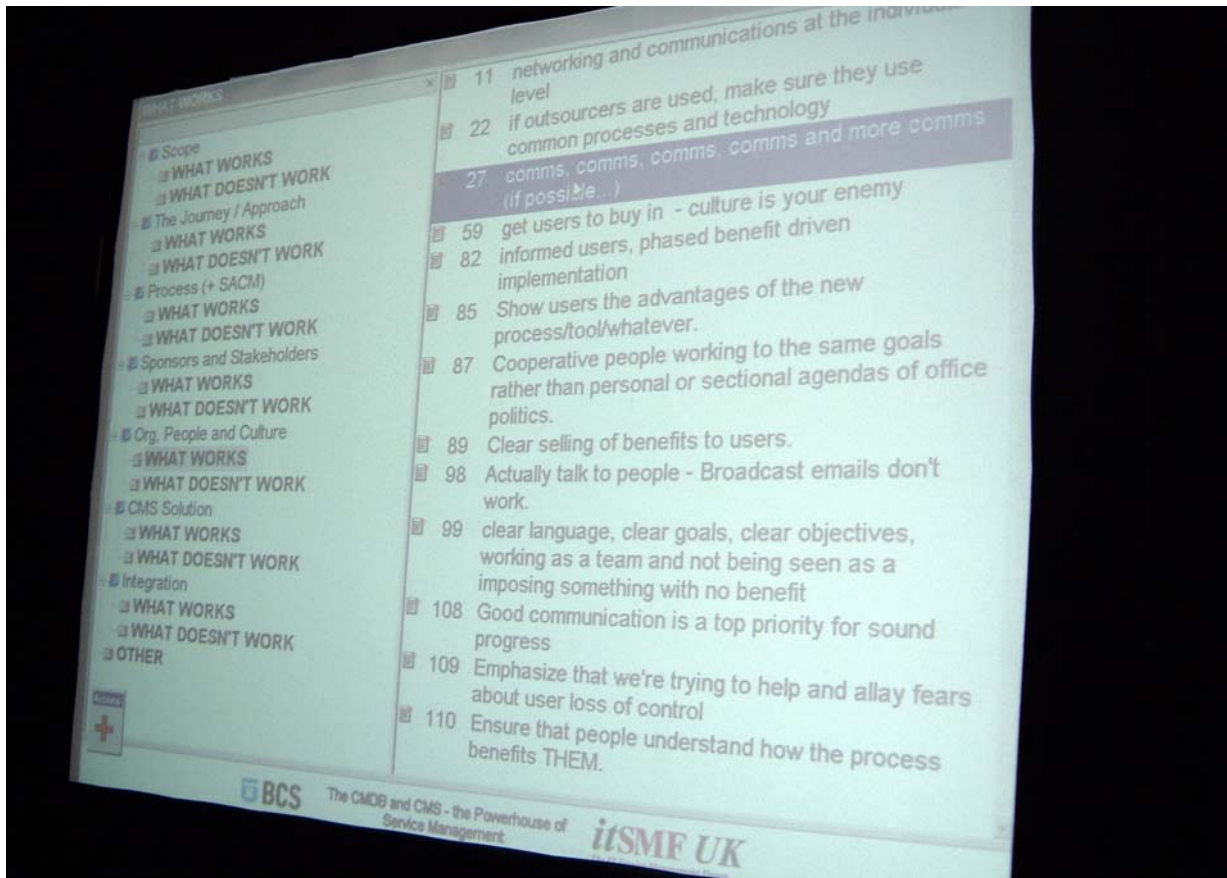


12.5 What Works / What Doesn't

Shirley and Ian continued by inviting the delegates to consider What Works and What doesn't work when implementing a CMS recording their responses in the following categories

- Scope
- The Journey / Approach
- Process (+SACM)
- Sponsors and Stakeholders
- Organisation, People and Culture
- CMS Solution
- Integration
- Other

The output recorded by the delegates (follows and) was displayed on the main screen for Shirley and Ian to comment.



12.5.1 Scope

12.5.1.1 What Works

- Limited to start with.
- Clear scope agreed by all parties gives a good target, but may omit some person(s) pet bits.
- Think for tomorrow, not just for today
- Be very clear about what you are trying to achieve - what decisions do you need to support?
- Have a broad and long term vision but make it clear it can only be delivered over a long period and in incremental steps
- Limited well defined scope - don't try to change the world in one go
- Look at most critical areas of business first
- Start small, scale fast, aim high
- Cover problem parts of business first
- One persons "vision" if in a strong management position can force action.
- View the holistic solution, and deal with manageable pieces
- Take a top down approach - what is the problem you are trying to solve; without understanding this you will stray badly.
- Keep the scope tight and prevent adding something or taking something out mid-project.
- When it fails outsource it

-
- Getting sufficient budget, for people, time and money.
 - Choose a good software tool and learn its abilities and limitations

12.5.1.2 What Doesn't Work

- Assuming that if you gain buy in from one part of the org and pilot, the rest will follow
- Lack of consultation, too much too soon
- One person / it-area driving the whole arena, others take a contrary position just because.
- Being too narrow in goals
- Too ambitious a scope without any waypoints for wins.
- Trying to 'boil the ocean'
- Not aligning CfM goals with business goals
- Don't store data simply because you have it. Always ask what value it adds to the CMS, and for whom?

12.5.2 The Journey / Approach

12.5.2.1 What Works

- Have a 'firewalled' team, of two or three people who are allowed to question, raise concerns, state that the project is off track and so on without any fear of retribution.
- The tool *will* influence the journey, choose it early and learn how to use it so there are no surprises downstream
- Consensus, business focused
- Have a clear expected end result - success factors
- Spend a reasonable requirements defining your requirements and testing them with users before you select a product.
- Small cooperative team with dedicated time rather than part of the day job.
- Having process representatives on project team
- Demonstrating business benefits as milestones are reached
- How do you eat an elephant? make you know what an elephant looks like, then small easy bites at a time
- Don't expect 100% first time, so get started and fix issues later
- Showing benefits to all stakeholders, esp. the ones you we need stuff from to encourage cooperation
- Evangelism approach -- grow champions who will grow further champions
- Defines measures that prove the journey is worthwhile in place before you start
- For public organizations, finish the Configuration Management implementation before the next election
- Bite size progress to a total solution.

12.5.2.2 What Doesn't Work

- Driven by few without consultation
- Don't hold huge conferences where the champions evangelize - your work force doesn't believe it.
- Do this as well as.....
- If people don't clearly understand the benefit you will never get buy in
- Selecting products too early.
- Submitting to client requests all the time
- Big bang implementation

12.5.3 Process (+ SACM)

12.5.3.1 What Works

- Clarity with an eye on purpose
- Ensure fit for purpose tool and identify the level of CI
- Get the buy in and involvement of the people who really know the business, not the ones who can't see the dirt under the carpet. In our case our service desk personnel have been invaluable in reminding us of the reality
- Minimal bureaucracy, simple is best
- Scenario walkthroughs of the process in action
- Has to involve the end users of the system, including the reporting/dashboard capabilities, looking at both current process and their wish lists
- Keep it SIMPLE!

12.5.3.2 What Doesn't Work

- If the processes are broken now, a CMS won't fix them
- Reams of documentation gathering dust
- Writing training materials in technical language
- Automating bad processes
- Giving people a means of circumventing the processes and tools.

12.5.4 Sponsors and Stakeholders

12.5.4.1 What Works

- The lowly frontline are the people that are going to be doing most of the work, even if they aren't paying for it, their buy in is vital
- Senior enough sponsor to avoid departmental politics.
- Enough stakeholders to cover all areas.
- Management and stakeholder buyin
- Demonstrating benefit in a language the sponsor/stakeholder appreciates
- Find the business area with the biggest budget and sell the solution to them the hardest. It might be exactly aligned with their roadmap, but if they have the cash ...
- Pick a star to hitch to and get them on board, someone with the ear of senior management and the respect of those below them
- Either cio level or multiple directs including both IT service management and critical business owners who depend on the IT services

12.5.4.2 What Doesn't Work

- Confusion between budget approver and sponsor
- Not obtaining a sponsor at the right organisational level
- Buy-in from IS engineers is an uphill struggle
- Decision makers dislocated from doers
- Technology driven without focus on business
- Sponsor at same level as other managers who own data or processes essential to the project.

-
- Too many stakeholders.
 - Championing technical benefit as opposed to business process impact
 - Stakeholders with their own agendas
 - Sponsors not senior enough - it'll take a couple of years of effort/costs before real benefits are delivered

12.5.5 Org, People and Culture

12.5.5.1 What Works

- Networking and communications at the individual level
- If outsourcers are used, make sure they use common processes and technology
- Comms, comms, comms, comms and more comms (if possible...)
- Get users to buy in - culture is your enemy
- Informed users, phased benefit driven implementation
- Show users the advantages of the new process/tool/whatever.
- Cooperative people working to the same goals rather than personal or sectional agendas of office politics.
- Clear selling of benefits to users.
- Actually talk to people - Broadcast emails don't work.
- Clear language, clear goals, clear objectives, working as a team and not being seen as imposing something with no benefit
- Good communication is a top priority for sound progress
- Emphasize that we're trying to help and allay fears about user loss of control
- Ensure that people understand how the process benefits THEM.
- Don't be grumpy
- Take time to understand how to make people cooperate
- It's not your process, it's our process.
- Balance dictatorial with the touchy-feely

12.5.5.2 What Doesn't Work

- Assumption that what you think is a good idea is a good idea for everyone else.
- Expecting co-operation from all teams within the IT department.
- Politics rather than results.
- Personal agenda's - not seeing the bigger picture, not wearing the company hat
- Not being able to manage problems if they can't be resolved

12.5.6 CMS Solution

12.5.6.1 What Works

- Provides tight control
- Most solutions do mostly the same things, albeit in different ways; don't spend too long on the selection, instead spend it on the implementation.
- Transparent information/holistic view
- Perfect is the enemy of the good
- Stable and responsive partner

-
- Integrated tool for all ITIL areas rather than buying separate and linking.
 - Make sure the GUI is very intuitive and user-friendly
 - Money, time, sponsorship, measurable progress, project based
 - The tool must support the process; if the process has to fit the tool, you have the wrong tool.

12.5.6.2 What Doesn't Work

- Don't buy a solution that will not integrate with the rest of your service management tool
- Don't try to take everyone with you - you can never satisfy everyone.
- don't rely on sales - make your own case based on a pilot
- Customising an off the shelf product. Take the best fit and live with it limitations.
- Opening up rights to update to all

12.5.7 Integration

12.5.7.1 What Works

- Identification management technology support
- The relationship between Configuration Management and Service Management
- Clear naming standards.
- know what your output are, then map the information / data flows required to deliver the output
- integrate processes before tools
- loosely coupled i.e. web services api so that components can be changed individually.
- design in extensibility - there will be new devices to manage during its lifetime e.g. blade servers and virtualization

12.5.7.2 What Doesn't Work

- Store all data in the single database
- Is it worth considering for an immature organisation? e.g. cmm level 0
- Sole reliance on discovery tools

12.5.8 OTHER

- Apply commonsense when all else fails
- Resilience, if you get knocked back, pick yourself up, rethink and go again.
- Metrics, fix the metrics early, ensure they are Tension Metrics.

12.6 How can we measure success?

Shirley and Ian then asked the delegates to consider the question "How can we measure success?" recording their ideas using the interactive technology.

- Baseline the before situation, then re-baseline at each waypoint.
- Big Bang: Is the customer shouting at us less often?
- Time needed to access the needed information
- Stakeholder satisfaction
- Reduction in unauthorised changes
- Establish smart objectives for each stage of the process
- Increase in first-time-fix rate

-
- Feedback from customer satisfaction surveys
 - %age of estate discovered to 100% accuracy
 - Mean time to service restoration should decrease
 - Reduction in software licence costs
 - Nothing can be measured until it is defined in the first place.
 - User satisfaction
 - Customer satisfaction, sponsor sign off
 - Fewer failed Changes as a result of incorrect config data/clashes on services covered by the CMS
 - Reduction in the number of reported incidents
 - Improved visibility of relationship between systems and services leading to better impact analysis and cost allocation
 - Set 6 simple KPIs, and track regularly to keep senior management informed
 - Incidents fixed more quickly on services included in CMS
 - Reduction in downtime
 - Process based kpi where the process / tool generates data required
 - Business process impact - KPI improvements
 - Aggregation of licences and associated reduction in fees
 - Ability to predict problems
 - Hardware purchase costs should decrease as redundant IT is identified
 - Reduction in the number of service desk calls
 - Reduction in power costs
 - What metrics should we use, what is important to us, what are we trying to improve, remember some unexpected improvements may happen as well as some unexpected negatives.
 - Aggregation of server based apps in Data Centres - demonstrates cost-avoidance for upcoming projects
 - High service utilisation
 - Fewer changes required and better planned
 - User satisfaction with tool
 - Can you now find your CIs?
 - Performance against benchmark
 - Better resource usage leading to lower CAPEX spend
 - Fewer instances of Changes requiring re-work/second implementations
 - Better information should lower support staff training costs
 - Customer delight
 - More time charged to billable work, less time on service over heads
 - Setup lighthouses of success
 - Good metrics on 'weak link' hardware should enable better purchasing decisions
 - Many compliance reports to show risk is reducing
 - Fewer releases per unit time with fewer bugs in them.
 - System and service owners should be identifiable
 - Customer perception of value of IT - is IT a partner?
 - Recognition of the cost savings by process improvements
 - Id of 'orphaned' kit

12.7 Feedback on this session

This session, in particular did not involve a formal presentation. At the close Shirley asked the delegates to record their responses to the following questions about the session:

- What did you like about this session?
- What could be improved or done differently?

12.7.1 What did you like about this session?

- Gave sweets out
- But not enough of them.
- Even the shy people can contribute
- More time for conversations
- Chance to hear about ideas from my peers
- Thought-provoking
- Makes you think
- Participative approach
- Good to see other responses and consensus - are we all mad?
- Nice to talk to people who have similar problems
- More topics to enter ideas on
- Anonymous (and therefore potentially more open) contributing g
- Statements/questions were well defined, meaning less 'on table' debate about meaning and more meaningful discussion
- The format enables all to contribute with the contribution recorded, although there are duplications it does gather much much more than the four or five verbal interactions in a normal presentation.
- We can take these machines home can't we? NO

12.7.2 What could be improved or done differently?

- More jelly babies
- It needs more time.
- Bigger keyboard please
- More explanation of what we were trying to achieve
- Voice recognition to avoid typing and spelling mistakes
- More time to discuss after throwing ideas up onto screen
- Screen resolution on the devices to enable the entire text of questions to be displayed
- Add e-mail as well as name so the session could be "dumped back" to delegates via email
- Sessions seem to start earlier than other. Missed a couple because of this
- Need to make it clear that sessions will have less benefit for people who haven't done a CM implementation before...