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Service Asset & Configuration
Management
Vision

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to Jason Sutherland-Rowe

iSMF UK **BCS** **BT Operate**
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Some initial comments

- This is a slide pack which was not produced entirely by me!
- That is not an apology
- Jason Sutherland-Rowe is a Process Consultant who works for BT Operate
- This work was done to provide a vision for how Configuration Management could be improved
- It was not a pan-BT or customer facing vision
- When asked to present on the 'vision' I sought the views of others in the business.
- If you have 2 'visions' you are either delusional or have double vision!


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Goal

Provide **robust management and control** of IT assets **information** through cataloguing, auditing and recording change etc; and in doing so, provide accurate information to **enable the efficient execution of ITIL processes** to deliver services.



- Ensure standard methods, processes and procedures are used.
- Prompt and efficient updates of configuration information
- Maintain the balance between the need to update CM information and agility of other ITIL processes.
- Continually improve to maintain ITIL, SOX and ISO20000 compliance, and business competitiveness.

Other processes will leverage the power of reliable, up-to-date, configuration management information to reduce their cycle time and risk of failure (RFT).

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Current Issues

Behaviours ...

- **People don't always use the process** – benefits of Configuration Management (CM) not known and not communicated, lack of ownership & accountability leads to poor quality, lack of empowerment and governance ...
- **No e2e service configuration information** – inventories of data, but little or no service information – e.g. e2e maps, user groups.
- **Scope of technical data recorded is too narrow** – infrastructure (Hardware, Networks, Storage) is recorded, but little or no information about software or applications.
- **Multiple owners of Configuration Management** – the function is split, with multiple owners, not all within BT Operate. This creates a fragmented CM process where even tactical improvements are difficult. There is no accountability for delivering a holistic service focused solution.
- **No coordinated standard for naming conventions** – across technologies, LoBs and organisations (CC, BT, HP ...). Lead to customisation or misuse of tools, overly complex reporting processes, difficulties undertaking any pan-BT activities – e.g. Problem Management, Capacity Management.
- **Processes are too labour intensive** – too much time is spent by the Configuration Management team creating reports, verifying data and doing data uploads for users.

Poor planning & Risk Management

Result in ...

- Unreliable data which doesn't reflect reality. No RFT**
- CfM doesn't support other ITIL processes – IM, PM, ChM ...**
- Service availability & CE quality are unacceptable – RFT & CT**

Making configuration changes into an unknown environment has the potential to be catastrophic!

Configuration Management Process

*Improve Process RFT & CT
Better Planning & Risk Management*

Service Desk
Incident, Problem, Request Management, SLM

Asset Management & Finance
Lifecycle, Contracts, Cost, Budgeting

Change & Release Management
RFCs, Approval, Tasks

Capacity Management
Performance, Utilization

Software Configuration Management
Actions, Policies, Usage

Key Activities

- **CI Identification** – New CI types, service maps, capture of information about legacy estate.
- **CMDB Control** – scope of CFM (CI types), access restrictions, adherence to the process.
- **CI Status Accounting** – AM (ordered, received, under repair, disposal), CIM (past, current, future and desired states).
- **Verification** – spot check of infrastructure / design teams procedures, physical audits, validate service maps ...

Benefits Realisation

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CI Identification-why is it always a problem?

1. Define the CM model, including business data, data required by other processes, data required by BTO and BTD.

2. Identify business critical products and services

3. On a service-by-service basis - enumerate the CIs top down, capturing the minimum data required - only key CIs and related information.

Products e.g. What is the Service?

e2e Services e.g. What makes up the service?

Applications e.g. What are the assets?

Software e.g. OS, middleware, database.

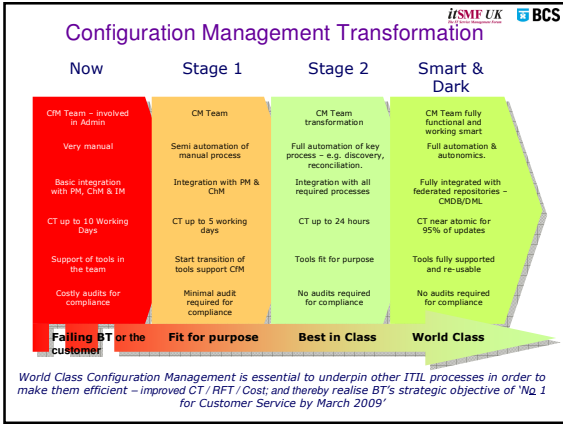
Physical e.g. Virtual Instance, Servers, SAN, routers

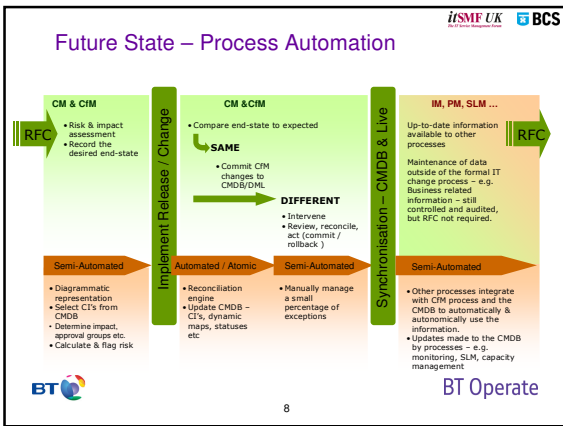
Accommodation e.g. racks, data centre

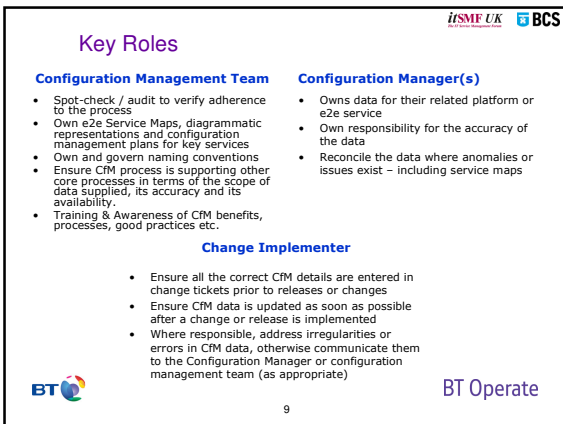
Low Level e.g. Management of development code streams.


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Key Upfront Enablers

Activities below **should** be delivered with the Configuration Management process in order to realise the **full benefits** and address user perception.

- ✓ Buy-in and sponsorship from Management
- ✓ Most organisations require a **Cultural shift** from Configuration Management as bureaucratic, to Configuration Management as an enabler for business change
- ✓ Ensure proper **controls** are implemented to manage **assets** throughout their **lifecycle** – from order to retirement.
- ✓ **Critical Services** identified, with **e2e service maps**.
- ✓ Assess the maturity of the CFM function and process to **baseline** for the future validation of benefits realisation. Use stages.
- ✓ Understand the **existing repositories**, and which of these will be replaced or **federated** in the future – have a strategy for data migration and decommissioning
- ✓ Establish the role of **Configuration Manager and the Team** ahead of the new tool. Fit the tool to the task and not the task to the tool.
- ✓ **CI ownership** clarified and communicated
- ✓ **Naming conventions** and governance process established
- ✓ Bring all asset and CFM under a single owner if possible

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Key Benefits & Primary KPI's

- Pockets of knowledge brought together into a single truth.
- Support for other ITIL processes through readily available, up-to-data, information about services – e.g IM, PM, AM, SLM.
- Adherence to regulatory compliance through the recording and tracking of assets.
- Increased service availability by giving Change Management the information to make proper risk assessments.
- Accurate information to support budgeting and cost management.
- Improved security of assets through better tracking and control
- Reduced costs through efficient use of assets – removal of unused assets, reallocation, pre-empt end-of-life etc.

Reduction in IM & PM numbers and severity
 Reduction in the number of high impact incidents
 Reduction in costs through better utilization of IT assets
 Reduction in compliance effort (less costly audits)

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Supporting Material

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Context - ITILv3 Systems

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Service Knowledge Management System

Broad set of *knowledge* that is needed to efficiently and effectively run IT services – e.g. test scripts, business & IT glossaries, business processes, supporting agreements and contracts. This was the missing link from ITIL v2.

Configuration Management System

Contains *information* about incidents, problems, known errors, changes and release. Includes tools for collecting, storing, managing, updating and presenting data about all CIs.

Configuration Management Database

Used to store configuration *records* throughout their lifecycle – CIs, attributes and relationships with other CIs. "A database used to store Configuration Records throughout their Lifecycle. The Configuration Management System maintains one or more CMDBs, and each CMDB stores

Attributes of CIs, and Relationships with other CIs."



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