ITSM Myth Busters - Common Myths and Misconceptions

The Federal Leaders Playbook - Season 1, Episode 2

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ERIC LAZERSON: This is Eric Lazerson. I've been around the federal ITSM space for about 15 years. I've worked for a number of large software vendors implementing large scale solutions, excited about this discussion. There's lots of things that we can dive into on-on creative ways to make ITSM successful.

JESSICA ALFARO: I'm Jessica [Alfaro]. I've been with, in-in the ITSM space for about 15 years, managing multiple teams, a lot of software ITSM implementations, CMDB, working with customers, understanding the requirements, process improvement, so I'm really excited to be here.

TOM HAMILL: My name is Tom Hamill. I've been in the federal space for um, a little bit over 20 years. Ah, I'm leaned towards the technical side of um ITSM. I have usual experience installing different applications, setting up from the application down to the network, which gives me a lot of lessons learned on how to do that from the roadblocks that you commonly hit when you do the installs, the applications and, also, I have a lot of experience being where I can take technical issues that we run into and explain them to you, uh, management where, we are and how we got into these roadblocks and how we're going to get around them.

KERRI POSTERARO: And I'm Kerri Posteraro. I have about 13 years of experience in the federal contracting space. Uh, the last 10 or so have been specifically focused on service management and, I tend to walk the line between business process, and the implementation of technology to automate those processes. I spend lots of time on the maturity um, of ITIL and service management process and helping customers maximize the use of these large enterprise implementations.

TOM HAMILL: Our topic today is going to be "ITSM Myth Busters". Sounds like fun to me. It's going to be common myths and misconceptions of ITSM.

ERIC LAZERSON: Yeah, I think this is one of my favorite topics to talk about. Uh, we've been around for many years talking to a lot of different federal leaders at different levels within organizations um, an-and you get a lot of pushback when you come in talking about Service Management, service improvements. Y-you talk about, ITIL, you know, and people kind of, they look at you strange. They know what it means. They've been through the foundation training, but they, they're not always well-versed in what's possible and they've heard from people on the ground some misconceptions or myths and uh, I think the first one that-that comes to mind especially from my background working at, you know, at BMC was, "I can't upgrade to the latest version to get new functionality, I can't do that because we've customized our application." So, customizations to an application, people that are in the space know you start changing the field, you start changing how users interface with it and in years past that made it challenging to upgrade but, Tom from a technical perspective, is it impossible to upgrade a system once it's been customized?

Tom Hamill: No, not impossible at all. I think you've got to put your due diligence in front to find out what has been customized, what are those customizations, and even ask the customer you know are they needed anymore, because maybe upgrade brings that functionality into it where it didn't have it previously. So, a lot of times you can cut down on the customizations that you want to bring over an-and that's one of the things you tackle. Um, but getting to know the customizations, you know, why they've done them, then next is, you know, documenting them and how to bring them over.

KERRI POSTERARO: I think the conversation around customizations is-is changing though, especially with the uh, new and upcoming technology in the marketplace. So, I think for many years customization was looked at in a really negative way, in a really costly way.

TOM HAMILL: Yeah, yeah.

KERRI POSTERARO: And with some of these new platforms that are dominating the marketplace, their message is kind of the opposite. It's, rather than a customization that is costly, it's a tailoring to your specific business needs, which is bringing on a different, a different reaction from the buyer which I think is interesting.

ERIC LAZERSON: I was around when some of the early platforms were out there for service management, they just automated basic help desk tickets and that automation was very tailored to a specific organization. Every field had a very specific name, everything was, like, for that organization only, and it was really challenging as in the federal space, that organization was one small help desk for one small group and so at take the department of the army, for example. It was 1 base, it was one group on that base and then when the Army tried to consolidated help desks, and you start looking at the systems that are automating that, you ran into problems because we don't call it that. Right, so, so then there became this shift of okay we're going to do an Enterprise tool and we're not going to let you tailor it at all to your specific organization and then we had this pendulum swing that went to no customizations and it is [cost-based], right, it is out of the box. You take these applications as they are and it was a fascinating shift and those that were you know customization heavy, they-they would use the myth or you know that misconception of "we can't go to that because you know we've done all this customization" and then one of the other myths that we'll move into is, you'll lose your data if you do that. You won't have any historical information and then that put these, you know, these kind of mid-level managers on the defensive of 'don't come after me, we're too special.' So, I've seen the shift and like Kerri mentioned, we're shifting the other way again, because now you start to have views of, for each of these groups. So yes, we can have these fields; we can tailor it slightly to what you need, and I know Jessica will speak to this, at the end of the day you are following an industry standard process for a reason and that reason is the benefit and the value of an ITIL process has been realized year after year by organizations just like yours.

JESSICA ALFARO: Yeah, Eric, just thinking about ITIL and how you know, because that's where a lot of this has come from and ITIL and people think that they can just implement ITIL out of the box, that it's something that you know you can just drop into an organization and make it work, but It's looking at a framework and adopting certain pieces of that and so these software companies are trying to help organizations put some type of framework in place which is where you know this application cut that you can just drop in and it's scaled to a point where you can do full-blown ITIL implementation but many organizations are not

ready for that. So, it's picking and identifying how where that organization is in its maturity and identifying those small pieces and small wins to-to get them there.

ERIC LAZERSON: I think that's a topic in of itself, is-is how much customization is too much customization? You-you said ITIL out of the box and that just makes me laugh.

TOM HAMILL: That's almost like another myth right, like if…

JESSICA ALFARO: Right

TOM HAMILL: If I'd installed this our maturity level goes up by two times because we have this application now installed. So, that-that's like another myth, I think you were getting into Jessica too.

KERRI POSTERARO: Yeah.

JESSICA ALFARO: Right.

KERRI POSTERARO: That's totally the perception. I think there's been countless times where an organization puts a stake in the ground and says, "we are aligned to the ITIL framework here, it's proven by this book I have in my hand" which is just a-a-a standard

ERIC LAZERSON: Yeah, I have that book too.

KERRI POSTERARO: Aca- right an academic book that-that lots of folks in this industry have and I think where it falls apart is 'I can read the book and understand the things I should be thinking about and the way that I should lay out this standard process to get the most out of a tool, but how do I translate that into my organization with the specifics. So, I should have someone overseeing, you know, pro- from a problem management perspective, I should have someone overseeing and responsible for the monitoring of that; but who is that going to be specifically, individually and what are they going to be responsible for and how are you going to communicate it?' So, I think there's a big gap and that the misconception of 'we're in an ITIL shop because I have a stack of the books on my shelf…'

TOM HAMILL: Right.

KERRI POSTERARO: It's 'how do I translate that into my business organization and then how do I automate that through the tool I've selected.'

TOM HAMILL: So, is that like, so how would you bust that myth, if you will to the customer, you know?

KERRI POSTERARO: I busted it, I busted it Tom. So, you know, one of my favorite stories, and it was Problem Management focused was I had a tough customer that didn't see a whole lot of value in the ITIL conversation because from his perspective they were doing it. He read the book, he understood what was supposed to be in place and it was a little bit of a toe to toe, and I think my approach to that was to say, "Hey, I have that book too, we're starting from a similar, a similar spot", and then I started to ask some questions like I alluded to earlier of, so who within this organization has this role, who have you assigned that to.

TOM HAMILL: Right.

KERRI POSTERARO: And in this organization what's considered a problem? What are some of the recurring things that happen specific to your environment? And it started to break down those walls a little bit, so…

ERIC LAZERSON: Yeah, I think you won him over. I-I am very familiar…

KERRI POSTERARO: Well thank you.

ERIC LAZERSON: With that story and yeah, he was a-an intimidating man. He was a, you know, Branch Chief who had been around. He had been around ITIL for a long time. He had gotten his ITIL expert certification. He had the stack of books and-and I think it's great that people are getting educated on that. There's an academic side of it and then there's room actual implementation of it and a lot of times there they're different because you can't just do word for word what's in the book. The tool will automate it but you have to know what information to put in there, what constitutes a problem and those are very basic things but those are things that people overlook time and time again.

KERRI POSTERARO: It's the 'why are we doing this?' There's- there's reasons why this framework is the standard, is considered best practice and works. So that struggle between my organization is unique and can't fit into that standard, it's kind of finding that happy middle ground of you can still, there's tons of places where you can continue to be unique but if you do these standard things, this is the value you get from it. So, helping them understand the why, rather than 'I was told to do this', it's now a mandate, so here's my book what do I do next.

JESSICA ALFARO: Yeah, it's making sure that everyone is speaking the same language. So, if someone new comes into the organization, that doesn't know exactly the words that are common to that organization, at least they understand by speaking ITIL speak. It's a common, it's a common language.

ERIC LAZERSON: one of the other misconceptions is, 'yeah, I have the book but it takes forever, I will never, we've been down the ITIL path, ITIL is a bad, you know, four letter word in our organization, don't say it.' That's a myth that I've run into, is it takes forever, what do you guys think from a timing perspective? Does it take forever?

JESSICA ALFARO: I don't think it takes forever if it's done in small, manageable bites. I think the approach is often, 'we're going to implement this, it's a one-time thing and once I do it and wrap a bow on it I never have to think about it again.' So, it's ingraining that mindset into the culture of the organization and then being able to segment the work where you can show value quickly. I think sometimes too much is taken on at once where you're not really looking to a tangible results, 6 months, 12 months, sometimes 18 months down the road, and the way that priorities change and flow within an organization that's way too long to keep people interested.

TOM HAMILL: Right.

JESSICA ALFARO: So, I think an approach that's worked for us pretty well over the years has been if you're sticking on just the problem management front for now, if you're starting

from nowhere, we're not aiming to go from 0 to the highest level of maturity overnight, but there are some things we can do within the next 30 days that can show you some value.

TOM HAMILL: Yeah.

JESSICA ALFARO: And that-that's worked.

TOM HAMILL: Yeah, I think setting up those milestones upfront right to say, 'if you're doing change, it doesn't have to be every change process you have in your organization.' You can say 'let's take the ones that are well-defined that are working now and people know and have ownership and let's put those in, and then we'll put some in and we've got the install, we have some-some success, then we're going to swing back to you and get a little more.'

JESSICA ALFARO: Right.

TOM HAMILL: You know, as you're up and running and people become familiar, there no longer is a vision of 'oh my gosh from start to end it's going to take…'

JESSICA ALFARO: 'Forever.'

TOM HAMILL: 'Forever,' you know and everything's going to be in there at once.

JESS ICA ALFARO: Right, so communicating those small wins across your organization, really no matter how small it might seem, if you're taking a step in the right direction, communicate it, promote it, share what you've done and where you're going next. I think that gets overlooked sometimes too if we hit the milestone we're very concerned about what's next and just keeping that train moving forward that we don't take the time to share the roadblocks that we've encountered, how we got over them you know the value to the business that was demonstrated and what bringing in some other entities, how that could push things forward even.

TOM HAMILL: Where do you think that comes from? Do you think that comes from past vendors that have come in and put that out there on the length of time, where are people getting this 'it's going to take too long'?

ERIC LAZERSON: I-I would agree. It is, it is…setting high expectat- or not even setting, not setting expectations.

JESSICA ALFARO: Yeah.

TOM HAMILL: Yeah.

ERIC LAZERSON: Just diving in and this is complicated stuff

TOM HAMILL: It's [all] done that from vendor to from location to location [it's a] standard

ERIC LAZERSON: Yes, so I would say there, there are certain, we talk about the ITIL books and the lifecycle you know books that you bring in and you reference. A lot of large system integrators that have gotten into this space have come up with their own spin on how to implement because it's kind of their playbook for ITIL. It works. So, I, so I worked for HP

for a number of years and we wrote some of the original ITIL manuals - that was part of I, you know, that was what they did. They were in it from the beginning. We had our own reference guides. We had our own stuff, but it took, it took a consultant to actually understand what that was, take the time to understand the organization, and find that balance of 'where can I use this tool, where can I pull this toolkit in and use it, what will this workshop provide?'. What I've seen more recently is a lot of other people have tried to follow that same model of develop our own stuff and tailor and then go and put it in an RFP to say this is what we're going to do. Once they get there, I've come behind them and seen those playbooks on the shelf. They're not used. They didn't take the time to roll up their sleeves. They didn't take the time to learn the organization. You have to have so much buy in throughout the organization for anything to be successful. So, things take long because what I've noticed is, if I'm in an organization and I'm a technician and you're telling me that I have to do something new, so I have to change the way I operate to meet this new fancy model, if I know that I can delay it a little bit and you'll leave me alone, I'm going to do that. So, you have to go in and sell the value of what we're doing, why we're doing it, understand their pain points because we have tools, because we have tricks that can help them, but if they don't know that I don't see that they're going to be resistant. So, I would say that underlying you know technician level, project manager level, they're looking at 'you're changing the way I do business and that's scary, so I'm going to resist.'

JESSICA ALFARO: Yeah, I think it's an all-or-nothing mentality. I am a big fan of maturity models and I think we do a really good job with that because we're able to look at what they're doing today, figure out okay you know they have a CMDB but it's maybe spreadsheets. So, technically they have something there just it's not a full-blown, in a tool that's fully integrated. So, helping them understand what they have, that it's there that we can you know slowly phase things in and help them realize value quickly.

KERRI POSTERARO: I think that maturity model mentality also helps keep a champion within that organization if you have one, or create the champion if one doesn't exist. So, I think everybody, whether contractor or government employee, shows up to work and wants to do a good job, shows up and wants to have an impact a positive impact on how operations run.

JESSICA ALFARO: I think we've been fortunate to, in some circumstances, work with really strong champions who love to talk about service management, are passionate about it, and will run it up the chain and make sure it's a priority. In other instances, we've kind of struggled to find that person, so I think by helping you can kind of gauge interest and, figure out a way to use that maturity model to show an individual how to take that one first step forward, and demonstrate to their leadership that they're thinking about the organization as a whole, that they are going down a path that will have benefits across the organization.

ERIC LAZERSON: Yes, so what I'm hearing is that it can take a long time but along the way there's lots of, lots of wins that you can have and you should absolutely communicate those wins throughout that effort.

JESSICA ALFARO: There's a continuous component to this, right? I mean if, with…

ERIC LAZERSON: Yes, yes.

JESSICA ALFARO: Things are changing in this environment constantly. The change in administration brings a totally different spin on budget allocation, on security mandates, on movement to the cloud. There's new things for IT staff to consider and figure out how to work into their environment every day. So, I think if you take the time to build that foundation it needs to become ingrained in the culture where it's not something that has a start and end date, it's just a way of thinking and it's a continuous evolution to stay efficient.

ERIC LAZERSON: So, if I take that and we talked about ITIL taking you know forever and I think we've kind of busted that myth, and we jump into change management and you mentioned, you know, the new administration – I didn't think we were going there today – but it's…

TOM HAMILL: Let's do it, come on.

ERIC LAZERSON: Interesting. You talked about security and new technologies being introduced which to me means things are changing, you're installing new equipment, you're changing from physical to virtual, which happened years ago, but the government is still-still challenged with that.

JESSICA ALFARO: I think that there's a balance for that. So, identifying what types of changes, so I think that's where organizations are struggling with change types and what's a standard change, what's a change that does require that level of granularity and visibility, ensuring that the technicians or the engineers that are putting these changes, see the value to them; I think most times they don't, so they don't realize that there is an impact to what they're doing and so I think that's a big a big part of it. They're removed from the visibility of that to the organization, which I think they should be a part of, they should if an unauthorized change is made they need to, I think the downstream impact of that needs to be communicated to them so that they've realized the importance of why the process is important to follow. I think because they're removed from that and they have other management that deal with the brunt of that and it's not, I just I feel that…

ERIC LAZERSON: So, you're saying that the myth of change management takes forever is true or are you saying that…?

JESSICA ALFARO: There's a balance.

TOM HAMILL: Can we bust this one or not?

JESSICA ALFARO: I think, I think, I think there's a balance there.

ERIC LAZERSON: I liked what she said about the standard changes and I think that's important for an organization. You have to get to a point within your organization that you trust the technology and you trust those that are working on it.

KERRI POSTERARO: Well I think they are overlooking that as the opportunity to be unique in an ITIL process. So, what is standard in your environment? What are the, how do you assess risk on the type of changes that you're making, unique to what your applications support, what business service you support? So that's often overlooked and if I don't have a good understanding to Jessica's point about I haven't defined the types of changes I make, I haven't thought about how those changes are touching mission-critical applications and the

impact that we have to absorb if that goes down, we kind of gloss over all of those definitions and we want the tool to just make it easy, but if you take a step back and you think about your environment, you can tailor that tool to not waste four levels of approval time for a you know a low rated system where if it does go wrong it's not catastrophic. You're saving those for approvals for your bread and butter application where you're making headlines if you have an issue.

ERIC LAZERSON: How many times have you seen, speaking of headlines, something happens then the CIO says, “no changes to the operational environment unless they go through the full change management approval process.”?

KERRI POSTERARO: More than I care to share.

ERIC LAZERSON: So, I, I think we have maybe time for one more myth, and the one I want to hit on and Jessica this is near and dear to your heart is the CMDB. So, I’ve heard every organization I’ve went to, they’re interested in the CMDB at some level but I think they also have already, by now, tried it, realized how difficult it is, maybe haven't seen the value and so they, I’ve seen a lot of organizations throw their hands up and say “CMDB is impossible.”

TOM HAMILL: Do they understand it? Right

ERIC LAZERSON: Well I bet that’s certainly a topic for discussion. Do you understand what a CMDB was? Earlier you mentioned spreadsheets, so spreadsheets are interesting and it’s certainly a way to track the assets you have and some of the attributes but-but what do you, what do you do with that?

KERRI POSTERARO: Spreadsheets are interesting.

TOM HAMILL: Isolate that one.

JESSICA ALFARO: Definitely a good myth to talk about because I’ve been a part of multiple CMDB implementations and I feel that the adoption of it has been very challenging and I’m still trying to grasp why that's the case because it's not a, from a concept perspective, it's an easy concept to understand. I mean you-you have assets in your environment, you have to manage them. Those assets are tied to services that are provided. It-it seems like it should be easy to pull all that together and-an-and manage that. I think a lot of it is-is ownership because many different organizations own different pieces of that process.

ERIC LAZERSON: So, you said, you said something that just kind of struck me. You said ‘services’ and to get the full value out of a CMDB you have to know what services you offer.

JESSICA ALFARO: Yes. Absolutely.

ERIC LAZERSON: Do most federal organizations know, in their IT shop; do they know what services they offer to their end user?

KERRI POSTERARO: I think the word service is interpreted differently at different levels with different boundaries by every level of person in an IT shop, which I think when the trend is to define services for CMDB purposes, you end up with 15 different approaches to it; not

really thinking about it from the service provided to your business customer, and I think people get kind of lost in the shuffle.

TOM HAMILL: And that's the holy grail, isn't it? – To get these services in in time into the CMDB. I mean, have we gotten there?

JESSICA ALFARO: It's a challenge.

TOM HAMILL: Yeah.

JESSICA ALFARO: It definitely is a challenge. I, you know you look at it's-it's what are the services, I just usually start with you know your consumers. So, who are your consumers and what were they reaching out to you as an organization for? So, then you look at 'alright what are the applications that are supporting those things, and then what are the assets that are supporting those applications?' and so that you know there are step stones to it and-and you know when we talked earlier about maturity model and-and I mentioned spreadsheets, that's the beginning. So, I always look at, you know, the CMDB as their step stones to get to that holy grail to the top of the pyramid which is knowing what services you have and having situational awareness of what's going on with those services.

TOM HAMILL: Yeah, I think we accomplished a lot of myth busting today. So, it's definitely a good good discussion. Thank you everyone.

JESSICA ALFARO: Thank you.

KERRI POSTERARO: Thanks.

TOM HAMILL: If you're interested in today's discussion, we invite you to read our show notes, and download additional free tools and resources at federalleadersplaybook.com. To learn more about Acuity, or to contact any of us directly, visit Acuity's website at myacuity.com