ITIL 2011 Service Offerings & Agreement (SOA) Certification Program

Course Summary

Description

ITIL is a set of best practices guidance that has become a worldwide-adopted framework for IT Service Management by many public and private organizations. Since early 1990, ITIL has been evolving from focusing on functions and processes under versions 1 and 2 to focusing on the Full Service Lifecycle Management under current version.

In addition to the existing benefits of aligning IT goals and objectives with the business, improving quality and reducing cost of operation; ITSM and ITIL now emphasizes the following areas:
*   Assist in transforming IT Service Management onto a strategic business asset
*   Assist in defining and managing the complete lifecycle of IT Service Management Process
*   Provide guidance on the development of Services Strategy, the development of Service Design, the Transition of Services from current to desired state, the Implementation and the Continuous improvement of the those Services

Through lectures and practice exam questions participants explore the concepts of good practice in IT Service Management based on the ITIL Edition 2011Framework.

The ITIL Intermediate Qualification: Service Offering & Agreement Certificate is a free-standing qualification, but is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert in IT Service Management. The purpose of this training module and the associated exam and certificate is, respectively, to impart, test, and validate the knowledge on industry practices in Service Management as documented in the ITIL publication.

The success in achieving this certification is highly dependent upon participants' effort in doing their homework, and self-study before and during the program.

This program is offered over a 5-day period where it combines theoretical and hands-on knowledge transfer, including individual and group practical exercises. The minimum number of students per session is 6 where the maximum is 18.

This five (5) day classroom training course with examination held on the afternoon of the 5th day is accredited by the examinations institute. The course includes approximately 30 hours of student-instructor interaction, a sample, and a formal examination. The format of the examination consists of a closed book paper of 8 multiple choice complex questions, to be answered within 90 minutes. (Candidates sitting the examination in English and who do not have English as their first language will be allowed additional 30 minutes to allow use of a dictionary). The pass mark will be 70% or more - 28 or more correct answers.

This training program includes the following as reference documentation:
*   Program slide presentation
*   Syllabus document
*   ITIL acronyms and glossary
*   Sample examination questions and answers

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Course Summary (cont'd)

Objectives

Through a series of lectures designed at achieving a clear understanding of the ITIL Best Practice lifecycle approach and through various exercises, assignments and discussions, participants can expect to gain the competence in the following areas upon successful completion of the education and examination components related to this certification:

- Overview of SOA processes and basic principles
- The value to the business of SOA activities
- How the SOA processes rely on a good business case
- How the SOA processes rely on a good understanding of return on investment (ROI)
- Processes across the service lifecycle pertaining to the service offerings and agreements curriculum:
  - Service portfolio management, which provides documentation for services and prospective services in business terms
  - Service catalogue management, which is concerned with the production and documentation of the service catalogue from a business and a technical viewpoint
  - Service level management, which sets up a service level agreement (SLA) structure and ensures that all SLAs have an underpinning support structure in place
  - Demand management, which identifies patterns of business activity to enable the appropriate strategy to be implemented
  - Supplier management, which ensures all partners and suppliers are managed in the appropriate way and includes contract management
  - Financial management for IT services, which includes ensuring understanding of the service value and the management of all financial considerations
  - Business relationship management, which ensures the customer's requirements are correctly identified
- SOA roles and responsibilities
- Technology and implementation considerations
- Challenges, critical success factors, and risks

Topics

- Introduction
- Service Portfolio Management
- Service Catalogue Management
- Service Level Management
- Demand Management
- Supplier Management
- Financial Management for IT services

- Business Relationship Management
- Service Offerings and Agreements Roles and Responsibilities
- Technology and Implementation Considerations
- Summary, Exam Preparation and Directed Studies

Audience

The main target group for this ITIL Intermediate Qualification Certificate includes, but is not restricted to:

- IT professionals
- Business managers
- Business process owners
- Individuals who require a deep understanding of the ITIL Certificate in the Operational Support and Analysis processes and how it may be used to enhance the quality of IT service support within an organization

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Course Summary (cont'd)

- IT professionals who are working within an organization which has adopted and adapted ITIL and who need to be informed about, and thereafter contribute to, an ongoing service improvement program
- Operational staff involved in event management process, incident management process, request fulfillment process, problem management process, access management process, service desk, technical management, IT operations management and application management, and who wish to enhance their role-based capabilities
- Individuals who have attained the ITIL Foundation Certificate in IT Service Management and wish to advance to higher level ITIL certifications
- Individuals seeking the ITIL Expert Certificate in IT Service Management for which this qualification can be one of the prerequisite modules
- Individuals seeking progress toward the ITIL Master Certificate in IT Service Management for which the ITIL Expert is a prerequisite.

Prerequisites

Candidates wishing to be trained and examined for this qualification must already hold the ITIL Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

Students must have at least 30 contact hours (hours of instruction, excluding breaks, and not including summary review time) with an Accredited Training Organization (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme. Two to four years' professional experience working in IT Service Management is highly desirable. Student should have the ITIL Foundation Certificate in IT Service Management (or other appropriate earlier ITIL and bridge qualifications).

It is also recommended that candidates should complete at a minimum of 12 hours of personal study by reviewing the syllabus and the pertinent areas within the ITIL core guidance in preparation for the examination, specifically Chapter 2: Service management as a practice.

Additionally it is recommended that candidates have experience of working in a Service Management capacity within a service provider environment, with responsibility for at least one of the following management disciplines:
- Service portfolio management
- Service catalogue management
- Service level management
- Demand management
- Supplier management
- Financial management for IT services
- Business relationship management

Before attending training for the certification it is also strongly recommended that candidates read the ITIL Service Lifecycle core publications and, in particular, the ITIL Service Strategy and Service Design publications.

Duration

Five days

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Course Outline

I. **Introduction**
   A. The context in the service lifecycle of the SOA processes from the service strategy stage (service portfolio management, demand management, financial management for IT services and business relationship management)
   B. Understand the reliance of these processes (service portfolio management, demand management, financial management for IT services and business relationship management) on the existence of a strategy. Understand the purpose and objectives, scope and value to business of the strategy management for IT services process
   C. The context in the service lifecycle of the SOA processes from the service design stage (service catalogue management, service level management, supplier management)
   D. Understand purpose and objectives, scope and value to business of the design coordination process
   E. How successful services depend on the customer's perception of utility and warranty and the relevance to the SOA processes
   F. Understanding how the SOA processes are the starting point for understanding and identifying customer requirements
   G. Return on investment (ROI) and the business case and the relevance to the SOA processes

II. **Service Portfolio Management**
   A. Introduction to the service portfolio and its relationship to the service pipeline and service catalogue
   B. The purpose and objectives of service portfolio management
   C. The scope of service portfolio management
   D. The value to the business of service portfolio management
   E. Policies, principles and basic concepts
   F. Process activities, methods and techniques
   G. Triggers, inputs, outputs and interfaces

H. Information management
I. Critical success factors and key performance indicators
J. Challenges and risks
K. Designing the service portfolio

III. **Service Catalogue Management**
   A. The importance of the service catalogue to the service lifecycle and its interface to the service portfolio
   B. The purpose and objectives of service catalogue management
   C. The scope of service catalogue management
   D. The value to the business of service catalogue management
   E. Policies, principles and basic concepts
   F. Process activities, methods and techniques
   G. Triggers, inputs, outputs and interfaces
   H. Information management
   I. Critical success factors and key performance indicators associated with the process
   J. Challenges and risks associated with the process
   K. Production of a service catalogue

IV. **Service Level Management**
   A. The importance of SLM to the service lifecycle
   B. The purpose and objectives of SLM
   C. The scope of SLM
   D. The value to the business of SLM
   E. Policies, principles and basic concepts
   F. Process activities, methods and techniques of SLM and how it relates to the service lifecycle.
   G. Triggers, inputs, outputs and interfaces
   H. Information management
   I. Critical success factors and key performance indicators associated with the process
   J. Challenges and risks associated with the process
   K. The content of SLAs and OLAs

V. **Demand Management**
   A. The importance of demand management to managing services throughout the service lifecycle

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Course Outline (cont'd)

B. The purpose and objectives of demand management
C. The scope of demand management
D. The value to the business of demand management
E. Policies, principles and basic concepts
F. Process activities, methods and techniques
G. Triggers, inputs, outputs and interfaces
H. Information management
I. Critical success factors and key performance indicators
J. Challenges and risks

VI. **Supplier Management**
A. The purpose and objectives of supplier management
B. The scope of supplier management
C. The value to the business of supplier management
D. The principles and basic concepts
E. Process activities, methods and techniques
F. Triggers, inputs, outputs and interfaces
G. Information management
H. Critical success factors and key performance indicators
I. Challenges and risks

VII. **Financial Management for IT services**
A. The importance of the process to the service lifecycle
B. The purpose and objectives of financial management for IT services
C. The scope of financial management for IT services
D. The value to the business of financial management for IT services
E. Policies, principles and basic concepts
F. Process activities, methods and techniques
G. Triggers, inputs, outputs and interfaces
H. Information management
I. Critical success factors and key performance indicators
J. Challenges and risks

VIII. **Business Relationship Management**
A. The purpose and objectives of BRM
B. The scope of BRM
C. The value to the business of BRM

D. Policies, principles and basic concepts
E. Process activities, methods and techniques
F. Triggers, inputs, outputs and interfaces
G. Information management
H. Critical success factors and key performance indicators
I. Challenges and risks

IX. **Service Offerings and Agreements Roles and Responsibilities**
A. Key roles and responsibilities of service portfolio management
B. Key roles and responsibilities of service catalogue management
C. Key roles and responsibilities of SLM
D. Key roles and responsibilities of demand management
E. Key roles and responsibilities of supplier management
F. Key roles and responsibilities of financial management for IT services
G. Key roles and responsibilities of BRM

X. **Technology and Implementation Considerations**
A. The generic requirements for technology to assist service design
B. The evaluation criteria for technology and tooling for process implementation
C. The good practices for practice and process implementation
D. The challenges, critical success factors and risks related to implementing practices and processes
E. How to plan and implement Service Management technologies

XI. **Summary, Exam Preparation and Directed Studies**
This module summarizes the material covered in the previous modules and prepares candidates for the examination through the review and practice of a mock examination. The examination is comprised of eight (8) multiple choice, scenario-based, gradient scored questions. The standard duration of the exam is Maximum 90 minutes.

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