

# ITIL<sup>®</sup> and Organizational Change

Pamela Erskine



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PAMELA ERSKINE

EXTRACT



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## PREFACE

Whether your IT organization is embarking on a full-blown IT Infrastructure Library® (ITIL®) process implementation, or you are simply changing existing IT processes, some level of organizational change is required to realize the full benefits. Organizational change is difficult and often slow to occur. Many process- and technology-related initiatives never realize the benefits of their investment as attitudes and behaviors within the organization affect the outcome and, therefore, the benefits are minimized, or, in some cases, non-existent.

*ITIL® and Organizational Change* provides a concise overview of five organizational change models that can help to guide planning for the changes that need to occur in your organization to be successful. Additional guidance is provided relating to key skills, concentration areas, and planning in order to:

- minimize resistance to change related to your ITIL process initiative
- provide a methodology to engage those affected by the changes in the planning and implementation process
- form the governance and project structure to improve project outcomes.

The guidance provided can be applied to almost any initiative, although this book focuses on providing clear, practical advice to help you achieve the return on investment expected from your IT Service Management (ITSM) project, by providing you with the tools to plan and manage organizational change and ensure success.

## **ABOUT THE AUTHOR**

Pam Erskine has over 15 years of leadership experience with a focus on IT and service transformation through clear vision and strategy, process improvement, knowledge management, training, and accountability. In her role, she is accountable for providing best practices, thought leadership, and guidance relating to the ITIL framework.

Pam is a proven leader, having operational responsibility for several IT transformation initiatives with measurable results in customer satisfaction, efficiency, and effectiveness. She has managed staff of 200+ that are focused on providing reliable IT services which are aligned with business needs.

In addition to operational responsibility, Pam has provided consultancy to Fortune 50 companies on IT strategy, IT service management, and organizational change initiatives.

Pam has developed an Advanced Organizational Performance Techniques™ program, entitled AdOPT™, which includes assessments, practices, techniques, and training relating to planning and managing organizational change. Although often applied to the implementation of ITIL best practices, this modular program works well with any initiative requiring a significant shift in organizational behaviors.

Pam is an ITIL Expert, an ITIL Service Manager, is Six Sigma certified, and is a Certified Help Desk Director.

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## INTRODUCTION

“It is not necessary to change. Survival is not mandatory”

W. Edwards Deming

### **Why do some organizations fail to realize the benefits of the Information Technology Infrastructure Library (ITIL) after implementation?**

Implementation of the IT Infrastructure Library or ITIL principles and processes can be transformational to the IT organization and, ultimately, the business, however, it is common for organizations to apply the ITIL best practices, yet never realize the benefits of the implementation.

ITIL is a best practice framework. It enables IT Service Management (ITSM). The ITIL framework is meant to be customized based on the organization. When implemented effectively, the positive results can be dramatic with the overall business benefiting, as they have the right technology at the right time to complete their required business objectives. IT organizations will find that the traditional IT silos are significantly diminished; accountability is reinforced; and the implementation and optimization of processes, services, and systems allows the IT staff to spend additional time on the tasks which benefit the organization the most.

While the implementation of ITIL principles and processes is a significant task, many ITIL-related initiatives fail to address the organizational change-related aspects of undertaking such an initiative.

## *Introduction*

If some of the strategy, processes, and functions associated with ITIL have been implemented, but the organization has not seen a shift relating to service or cost, what went wrong? It is possible that costs are increasing. Perhaps there was investment in an IT service management tool and the processes implemented or changed seem to be inefficient. Leadership and the project manager are wondering what went wrong with the implementation. Maybe, nothing appeared wrong with the implementation, but the team just doesn't seem to be following the process or using the tool.

If the organization isn't realizing the benefits of ITIL, or if costs are rising, or the service appears to be getting worse, it is time to ask how the organizational change addressed the culture of the organization and whether the necessary shift in behavior occurred to support the required end result.

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## **CHAPTER 1: HOW WAS ORGANIZATIONAL CHANGE ADDRESSED DURING THE PROJECT?**

Depending on the size of the ITIL-related initiative, a change in attitude and behavior was probably required. Organizational change, which includes behaviors and attitudes, as well as culture, is often a very slow process, but it can be achieved through effective organizational change management. It can take planning and a lot of patience.

Shifts in behaviors and attitudes are difficult at best. Within an organization, there are shared values and beliefs. When large groups of people apply the same value or belief system to an organization, all areas of an organization are affected. New staff joining the organization quickly adapt to the existing system of norms.

Individuals who do not conform are sometimes seen as “difficult.” They may even be reprimanded for their inability to get along with others. At times, they may have trouble accomplishing tasks and, therefore, they do not feel successful or valued.

It is extremely stressful to be the lone voice within an organization indicating that a change is needed. Often, management inadvertently discourages this type of behavior by assigning issue resolution to whoever brings a problem to light, or by failing to acknowledge the individual voicing the concern.

Individuals within the organization also have their own goals and objectives. Perhaps they want to advance, retire, transfer, or find another job. The belief system of the

## *1: How was Organizational Change Addressed during the Project?*

organization may affect how an individual's goals and objectives are displayed and, therefore, managed within an organization. Does the organization recognize and value advancement? Do they have a history of long-term employees?

In addition, there are sub-cultures within an organization; the sub-cultures may be age or ethnicity based, or related to the length of employment, or perhaps based on some other factor.

Given that the organization shares the same belief system and new team members quickly adapt to the challenges that may exist within the management structure when dealing with change, you can see why it is a challenge to shift the culture of any organization. For organizational change to result in a true cultural shift planning is required and shouldn't be taken lightly. It requires planning, precise execution, and, most importantly, communication with those directly impacted, their direct leaders, and even executives within the organization.

It is important to note that people don't push back merely because change is occurring. They push back when they feel threatened. New or changed processes, reporting, and system changes can pose a potential threat. They may no longer be an expert when completing their work. There may be a feeling that a different standard is emerging and they are not prepared to meet the objectives, as they have not been engaged or trained in the new way of completing the work. Throughout this book, there is an emphasis on communication with those affected by change. To take it a step further, engagement is required. People experiencing change are less likely to be intimidated if they have a voice in the process and they can understand and anticipate how

*1: How was Organizational Change Addressed during the Project?*

the change may impact their ability to complete their work successfully and contribute to the overall success of the initiative.

***Has the organizational change required for success been defined and addressed within the IT service management project?***

If the cultural aspects of change were not addressed, or if the change was not sufficiently addressed based on the complexity and true scope of what was expected within the organization, perhaps this is why the benefits of the recent ITIL-related changes are not being realized.

Leaders within an organization often say that team members need to support and follow the direction that is provided. To some degree, this is true, however, it is not realistic. If those affected by the change don't believe in the change that is occurring, if they don't feel as though their voice is heard, or don't see the benefit to the organization and to themselves, what happens?

In the scenarios noted above, some individuals will change their behavior and conform, however, more than likely, while there may be some changes, there will be areas that are lacking, or changes that never fully take place as true buy-in does not exist. Team members may fail to provide valuable feedback which could greatly benefit the implementation, as they don't believe in the change occurring. Passive-aggressive behavior may also come to light. Examples of passive-aggressive behavior include: "forgetfulness" relating to assignments which ultimately negatively affect the project or the service being delivered; poor performance as the individual is not happy with the

## *1: How was Organizational Change Addressed during the Project?*

changes to the process and procedures; moodiness as the individual completes their work, but ensures everyone around them knows they are not happy; and failure to support their colleagues by withholding specific information, thereby causing their co-worker to fail at their tasks.

Do the behaviors noted sound familiar? Does it relate to the ITIL process implementation? Perhaps you have witnessed similar behavior with other projects. Everything described above relates back to organizational change. In the upcoming chapters, we'll explore some organizational change models and methods that can assist with managing some of these issues in order to recognize the benefits of an ITIL process implementation.

### **Project selection**

In order to recognize how the ITIL process implementation is affected by the culture of the organization, let's explore why the initiative was given enough importance to proceed to implementation.

Hopefully, there is an understanding of why the organization made the choice to implement ITIL: the value to the overall organization as it relates to improving service, reducing costs, and meeting the needs of the business. If there is a gap relating to understanding the underlying factors associated with the company creating the ITIL or broader ITSM project, the first step in the journey to tackling the organizational change issue should be interviewing key individuals within the company to understand why they undertook this project. The interview

## *1: How was Organizational Change Addressed during the Project?*

process should involve the decision maker and key executives who were part of the initial conversation.

If these individuals are no longer with the company, or they have transitioned to another role, take some time to identify the key stakeholders in the implementation. Who has the most to gain? Which team will experience the most dramatic changes in how they operate? The answers to these questions should help to identify the right people to engage in the interviews.

Often executives are happy to discuss the drivers for the ITIL implementation once they understand why the question is being asked, so prepare an introduction which explains why this is important, and a short series of questions. Some potential questions are noted below.

- What was the driving factor for the ITIL implementation?
- What is the value of ITIL to the business?
- What is your view on the value to IT?
- What outcomes would you like to see as a result of the implementation?
- How would the outcomes be measured?

Understanding why the ITIL initiative was deemed important enough to implement within the organization will help to frame communications with key stakeholders; establish sound goals; create meaningful metrics; and develop the organizational change plan. Merely having the conversation with key stakeholders or executives will begin the process of promoting the change required. Discussion at the senior level is important to ensure buy-in with leadership and further solidify the goals and objectives of the project.

## *1: How was Organizational Change Addressed during the Project?*

### **The value proposition**

After understanding why the ITIL initiative was selected for implementation, exploration of how the various areas are impacted, as well as the value proposition for each area and/or generic position should be investigated.

The value proposition for IT should also be considered and documented for future use in conversations and various communications. What are the benefits to IT arising from an ITIL implementation? Some examples of benefits are noted below.

- Repeatable processes resulting in consistent service.
- Minimized down time and business disruption, as changes to the IT environment are budgeted, planned, and managed.
- An understanding of the objectives and outcomes of the business.
- An assurance that work takes place on the right activities to meet the business needs.
- Lower costs with improved return on investment.
- Improved relationships with the business.
- Meaningful metrics.

What is the value proposition for IT teams?

- Less time is wasted as work is done on the right projects.
- Repeatable processes result in fewer reactionary events, such as system down time.
- Relationships are improved between IT teams as expectations are defined.
- Metrics allow teams to know how they are doing
- Relationships are improved within the business as expectations are known.

## *1: How was Organizational Change Addressed during the Project?*

What is the value proposition to the IT staff member?

- Responsibilities are succinctly defined allowing the individual staff member to build expertise in their assigned area.
- Relationships are improved within IT; handoffs between teams are easier.
- Meaningful metrics allow team members to know how their team is doing and the metrics are used to improve the process.
- Interactions with the business are less stressful as expectations are known.
- Information is available to support the technology.
- Information is available to understand the known issues and business needs and, therefore, the technology is improved.
- IT completes the right activities and projects, so there is less wasted time.

What about the benefits to the business? Ultimately, IT needs to provide the business with the technology and services necessary to meet their objectives and achieve the required outcomes. IT should effectively support the business. It is why IT exists within the organization.

How does the ITIL project affect the business? ITIL and ITSM affect the business by enabling IT to:

- provide value by strategic partnering/consulting
- engage at the planning and budgeting cycles
- understand business objectives
- manage the service portfolio based on the needs of the business
- invest in the right technology to meet the business need

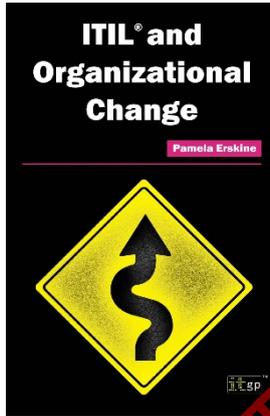
*1: How was Organizational Change Addressed during the Project?*

- provide some transparency in the cost of services, thereby enabling decisions based on cost, risk, and quality which will lead to less waste of both funding and human capital
- retire services/technology when appropriate
- provide the right level of service to meet the business need
- provide the right types of services and technology
- provide the right hours/levels of service
- prioritize services
- provide access points, such as a catalog, service desk, e-mail, chat, field service, and/or walk-up center.

There are intangible benefits to the ITIL implementation as well. Improved relationships with the business and between IT organizations are often a result of improved, measurable processes.

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## ITIL and Organizational Change



- Explains how to revolutionise your business with the ITIL® framework, giving readers essential advice on how to successfully manage the process.
- Reveals why many organisations fail to realise the full benefits of ITIL, meaning that readers can avoid these pitfalls and help their IT function prosper.

*"Erskine does a wonderful job of explaining the human aspects of change... The book is an excellent preparation guide for companies or consultants embarking on an ITIL journey..."*

Rocky Middleton, Senior Manager of Service Delivery, AGSI

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