

# The Cherwell Software Education Series

## Part One: A Guide to Service Catalogues

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Innovative Technology Built Upon Yesterday's Values

# The Cherwell Education Series

## Part One: A Guide to Service Catalogues

*This guide provides:*

- *Key insights into how to create a Service Catalogue*
- *Clear guidance on creating a Service Catalogue*
- *An easy-to-use Service Catalogue template*

*A Service Catalogue lists the services provided by the service desk. It should contain a customer view and a business view.*

### Introduction

Service Catalogues are one of those service desk terms that we've all heard of – and many of us probably know what Service Catalogues are – but there are still those of us who do not have the time, resources, or a clear idea of how a Service Catalogue can be implemented. Service Catalogues are a fundamental part of service delivery because they document every service that you provide and build contracts with your customers (Service Level Agreements) based on how these services are delivered. Many of us probably have a very clear idea of what services we provide, but there will be service desks that have not clearly documented and defined their Service Catalogue.

This guide – the first in a three part series from Cherwell Software and SDI – will provide you with a key insight into how you can create a Service Catalogue; clear guidance on creating a Service Catalogue; and an easy to use Service Catalogue template to help you start realising the enormous business and customer benefits that a Service Catalogue provides.

### Definition

A Service Catalogue is a list of services that an organisation provides to its employees or customers. Each service within the catalogue typically includes:

- A description of the service
- Timeframes or Service Level Agreements (SLAs) for fulfilling the service
- Who is entitled to request/view the service
- Costs (if any)
- How to fulfil and deliver the service

### What's the purpose of a Service Catalogue?

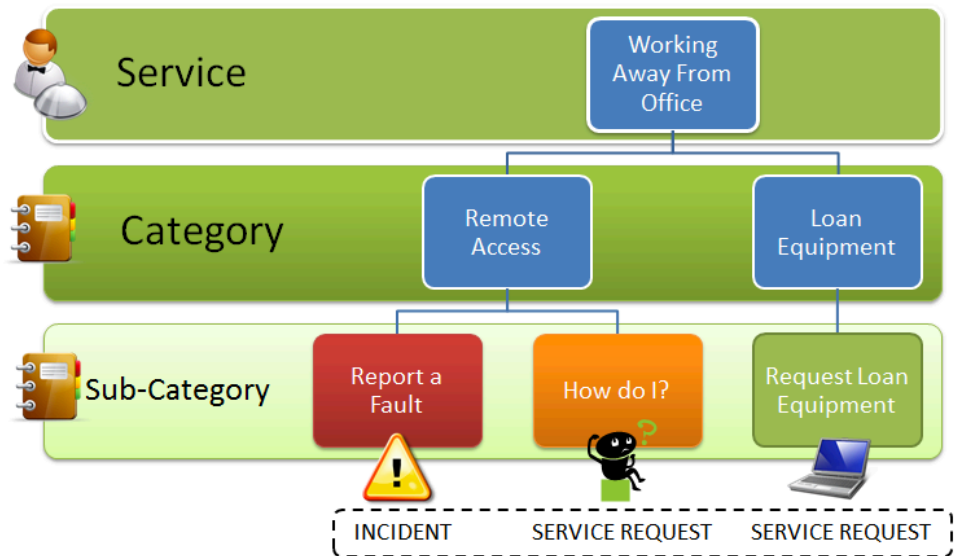
A Service Catalogue lists the services that the service desk provides. Often these are grouped by type and are searchable (this is very important if the service catalogue contains a significant number of entries). The service will also have a description and additional details.

A Service Catalogue has two specific service delivery purposes: customers and the business.

**Customers:** The benefit for customers is that a service catalogue lists all of the services currently available to them and allows them to submit a request for service. In this way, the Service Catalogue performs a useful function as customers can use self-service to request services, which alleviates some of the pressure on the service desk and will realise significant time savings. For customers, they receive an easily understandable view of the catalogue and can be proactive in their requests.

**Business:** For the business, a Service Catalogue defines the services that are available and delivered to customers. A Service Catalogue allows the business to carefully define and select the available services and ensures there are the correct processes and procedures in place to deliver services to customers. It provides the basis for managing and monitoring the service delivery that is aligned directly to the business to help IT be a successful business partner.

### What does a Service Catalogue contain?



Select the relevant individuals to create the Service Catalogue.

It's crucial to secure 'buy-in' from senior staff and those responsible for service delivery.

### The steps for creating a Service Catalogue

#### Step 1: Initiation

The Service Level Manager should instigate an awareness programme selecting the relevant individuals to be selected in creating the Service Catalogue. It is crucial that the Service Level Manager achieves 'buy-in' not only from senior staff but also from those who are responsible for delivery of services.

Achieving 'buy-in' can be done in a number of ways, including meetings with team leaders, group emails, memos, focus groups, etc. Whichever way the Service Level Manager decides to initiate the process, the desired output should be that the Service Level Management process is supported by the key stakeholders and understood by the teams.

The key stakeholders and subsequently the teams should be aware of the Service Level Manager's intentions in regards to the duration of the process and the desired end result. Scheduling of follow-up meetings should be discussed at this point and timetabling should feed into the project plan. Discussing these areas now and explaining the process requirements will give everyone a level playing field from which to start the process.

By arranging follow up meetings and developing the project plan in tandem with key stakeholders, the Service Level Manager will be given a good indication of how healthy the level of 'buy in' is.

If the level of buy in is not as expected, it may be worth setting up individual meetings with team leaders to resolve any issues and revisit why the Service Catalogue is crucial to the service level management process and how this feeds into the overall business strategy.

*Start simple and keep it simple – small moves.*

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*Identify what services IT is capable of providing, what is currently provided and what is in scope for the future.*

*Consider everything from network connectivity to printer maintenance.*

*This is the customer version of the Service Catalogue.*

*Set up a workshop with small groups of customer to obtain a realistic view of required support.*

### **Step 2: The Highest Level**

When developing a Service Catalogue, it is crucial to sit down and discuss exactly what services IT are capable of providing, what is currently provided and what is in scope for the future. Nothing should be left to chance. This is a high level summary that will be the foundation of the 'customer' version of the Service Catalogue. It is important to consider *everything*, from the big services like network connectivity to something seemingly trivial like printer maintenance.

The Service Level Manager will need to sit down and speak with the team leaders and managers not only in first line support, but second and third as well. This may extend to colleagues in technical support, network and desktop systems, as well as the database and analyst teams.

Some examples of service categories are:

- Applications
- Working away from the office
- Files and Data
- Permissions & User Accounts
- Hardware & Equipment
- Meeting Room Resources
- Technical Systems, such as Server Maintenance, Backups, Environmental Management.

When documenting the categories, it is important to use names the customer will understand, so don't be tempted to refer to services by project names or use IT terminology. The Service Catalogue should be understood by *everyone*.

For simplicity and ease of understanding, dedicate one page of the Service Catalogue to each service.

### **Step 3: Defining Services**

Once the Service Level Manager has a list of the service categories (and each is allocated a page within the Service Catalogue), he/she will need to define what types of support are available within each. These should be based upon the types of support provided to the customer.

Setting up a workshop with small groups of customers will be useful in obtaining a realistic view of required support. One workshop per service category would allow the Service Level Manager to gauge what internal customers expect from each service. It will also allow he or she to monitor and control customers' Service Catalogue expectations by pre-empting and resolving any concerns.

The types of support the workshop group may expect from an email service, would be:

- Email service
- Mailing list creation
- Anti-spam
- Web mail
- Virus protection
- Setting up new accounts

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All of these would be added to the initial Service Catalogue draft in preparation for the technical discussion, later on, with the relevant IT teams.

At this stage, it is also important to work out how these services map back to the customer. Is there a logical path between the customer who identified the request and the actual support being offered? If not, does the support fit somewhere else? Producing a document that lists which customers identified which support will be useful when maintaining expectations and also when feeding back (should the level of support not be as the customer expected).

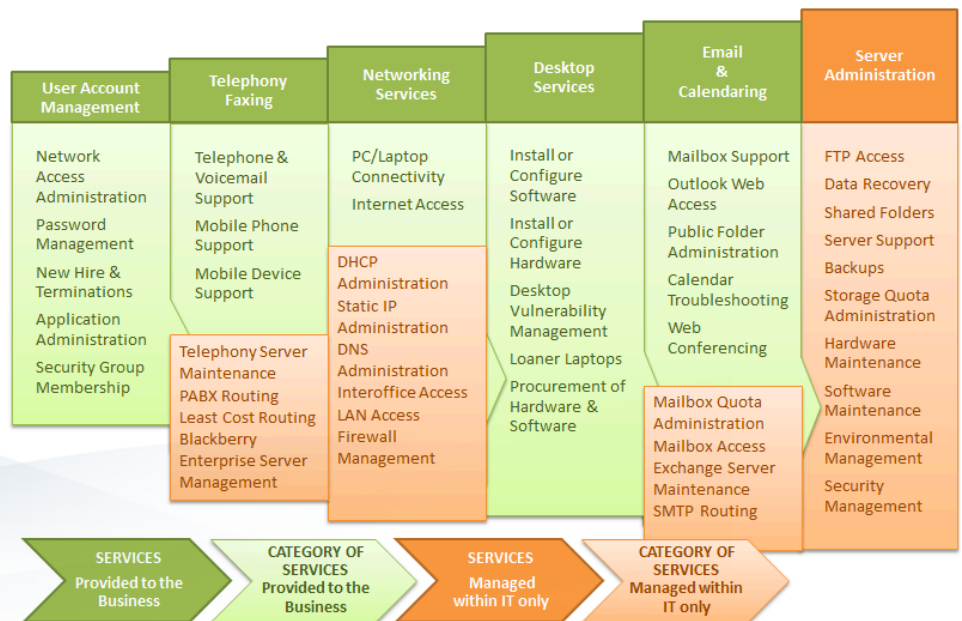
Workshops are a great way to extract information quickly and accurately. Most importantly, they allow the individual to gain consensus from the service users. Prior to the workshop, it will be necessary to clearly outline the session objectives. This will allow the group to stay focused and not deviate from the agenda. Breaking the session down into tasks will help achieve this. Make sure to send the objectives to all attendees prior to the session.

Workshops are also useful for ‘getting the message out’ about the Service Catalogue and will be invaluable once it comes to marketing the customer document internally.

*Establish who is supporting the service and the teams responsible for providing the support.*

### Step 4: Service Owner and Levels of Support

At this stage, it is important to establish who is supporting the service, and reference this against a list of supported services. An example of depicting the services within the catalogue is shown here:



The previous steps should have given you a good idea as to who is supporting the service and the teams that are responsible for providing the support. In our example, if you are focusing on the ‘Email Service’, then mail management might be your supporting service. You would also need to include the name of the IT Service Owner who manages the service.

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*Identify the 1st, 2nd and 3rd levels of support, and list the types of support provided.*

*Include the availability of each support.*

*Review with the IT teams that deliver the support. This needs to be on-going as new services are delivered or decommissioned.*

Against the service, identify the 1st, 2nd and 3rd levels of support, and list the types of support they provide. In terms of the 'Email Service', this would be:

### **1st Level: The Service Desk**

- call management
- mail lists
- passwords
- account set up

### **2nd Level: Systems Operator**

- mail server management
- administration of accounts

It is also important to include the availability of each support – the service time for the Service Desk might be from 08.00 to 17.30. The 'technical' version of the Service Catalogue should be developed to include all Operational Level Agreements (OLAs) in place, Underpinning Contracts (UCs) in place, Service Owner and escalation paths.

To enable version control, it is also important to specify the date the Service Catalogue was issued and the date it was last updated.

If there is a cost for services, it would be useful to add an additional row for 'Charges'. This helps establish appropriate pricing based on the level of service being delivered. Examples of this are included in the sample Service Catalogue at the end of this guide.

### **Step 5: The Internal Review**

Once the supporting services and the levels of support have been considered, it is important to review them with the IT teams that actually deliver the support. This will be on-going throughout the Service Catalogue process as new services are delivered or decommissioned.

Decommissioning a service will be decided by the support services involved, but the decision process will be facilitated by the Service Level Manager. This may require the initiation of talks between the customer and the service provider, outlining the initial requirements and why they cannot be met.

If the service is withdrawn, the service provider will be required to back this up with evidence supporting the decision. Ideally, this should be done as early as possible so that if there are significant objections, these can be dealt with immediately. If the objection is considerable, the decision to decommission could be overturned. However, by this stage, this would be unlikely as each element of the service would have been thoroughly reviewed. It is the Service Level Managers responsibility to monitor and report on this process.

### **Step 6: Two Views**

Using the complete dataset, we have created 2 views: the customer version and the technical version.

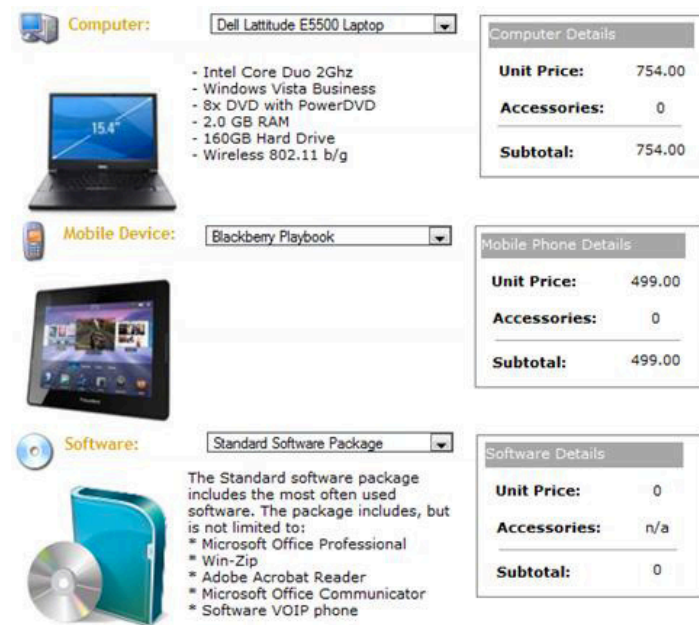
**The Customer View:** The customer version will contain all the information relevant to the business. This is the high level detail and should only show what the service is, not how it works. This is the document that will be marketed to

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*The Customer View contains all the information relevant to the business.*

internal customers, and, much like a catalogue, you would find in a store (see fig 2). It should only provide the key details about the product (i.e. the service provision).

*Keep it brief and to the point*



**Computer:** Dell Latitude E5500 Laptop

Computer Details

<b>Unit Price:</b>	754.00
<b>Accessories:</b>	0
<b>Subtotal:</b>	754.00

Specifications:

- Intel Core Duo 2Ghz
- Windows Vista Business
- 8x DVD with PowerDVD
- 2.0 GB RAM
- 160GB Hard Drive
- Wireless 802.11 b/g

**Mobile Device:** Blackberry Playbook

Mobile Phone Details

<b>Unit Price:</b>	499.00
<b>Accessories:</b>	0
<b>Subtotal:</b>	499.00

**Software:** Standard Software Package

Software Details

<b>Unit Price:</b>	0
<b>Accessories:</b>	n/a
<b>Subtotal:</b>	0

The Standard software package includes the most often used software. The package includes, but is not limited to:

- \* Microsoft Office Professional
- \* Win-Zip
- \* Adobe Acrobat Reader
- \* Microsoft Office Communicator
- \* Software VOIP phone

*The Technical View contains all the information relevant to the IT providers supplying the service.*

**The Technical View:** The technical version should contain all the information relevant to the IT providers supplying the service, so:

- The service owner
- The end user
- The 1st level support
- The 2nd level support
- The 3rd level support
- The 1st, 2nd and 3rd availability
- Escalation matrix

*The Service Catalogue should be a 'living' catalogue where services and support levels are added and removed.*

### Step 7: Review and Change Management

The last step is to agree with relevant parties a process whereby the Service Catalogue is reviewed. It is also important to consider how it is going to be marketed internally.

The Service Catalogue should be a 'living' catalogue where services and support levels can be added and taken away as required. Alongside the Service Catalogue should be a detailed plan outlining the change management process and who is responsible for each stage.

Just as the OLAs and Service Level Agreements (SLAs) are constantly reviewed, so to should the Service Catalogue as each document has a direct bearing on the other. It is crucial to make sure the customer version

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*Market the Customer View of the Service Catalogue across the entire organisation.*

of the Service Catalogue is marketed across the entire organisation by the implementation of a communication plan. The ways to market the Service Catalogue are numerous and will depend upon the resources available. A company intranet, a companywide email campaign and a company newsletter are ways to communicate the Service Catalogue process and its benefits.

### Sample Service Catalogue

Please note that values for services given here are examples only and should NOT be regarded as standard. Each company's requirements of Service Catalogues are different – consequently, every Service Catalogue is different.

<b>Service Description:</b>	Delivery and management of electronic messaging services to and from the company
<b>Services Included:</b>	Mailbox Support (troubleshooting, email aliases, shared mailboxes etc.) Public Folder Management (structure, security, synchronization) Calendaring (synchronization, availability, shared, security) Distribution List Management (global address list, security) SPAM filtering and Management (security, safety, Mailbox Quota Administration Security Management
<b>Services Excluded:</b>	Local client mailbox management Restoration of mailbox information Assistance with Personal Folder Storage (PST)
<b>Service Options:</b>	Restoration of individual mailbox data at the request of legal requirements.
<b>Service SLA:</b>	Provide availability of 99.9% not including scheduled change outages. Measure availability based on Exchange Server uptime. Process requests to add, delete, or change the name of an email account within 1–3 days. Restore service within 2 hours for a Severity 1 outage, within 24 hours for Severity 2 outage, and within 48 hours for a Severity 3 outage.
<b>Default OLA Team:</b>	Infrastructure Team Hardware Support OLA
<b>Service Hours:</b>	24 hours 7 days per week including holidays
<b>Delivery Scope:</b>	Corporate wide. In all countries and locations.
<b>Importance:</b>	Mission Critical
<b>Last Review Date:</b>	01 January 2011
<b>Service Owner:</b>	John Smith, Service Desk Manager
<b>Business Owner:</b>	George Flynn, Chief Information Officer
<b>Business Alignment:</b>	Primary communication tool for day-to-day business continuity.
<b>Outsourced To:</b>	Hardware failure outsourced to Hewlett Packard Support Services

### About Cherwell Software

Cherwell Software is the developer of Cherwell Service Management™ – a fully integrated solution for IT and support professionals. Designed using Microsoft's .NET platform and Web 2.0 technology, Cherwell delivers out-of-the-box 11 fully integrated ITIL v3 PinkVERIFIED management processes, including Incident, Problem, Change, Release, Configuration, SLA, Service Catalogue, Event and Knowledge. With a holistic approach to service management, Cherwell empowers IT and support departments to fully align themselves with the organisations they support. Being quick to deploy and easy to use, delivered as either a traditional On Premise solution or via an On Demand SaaS subscription, Cherwell delivers true enterprise power for a mid-market price.

Headquartered in Colorado Springs, USA and with European offices in the UK, Cherwell Software was founded, and is managed, by a team of industry experts.

Cherwell Service Management delivers a highly scalable and extensible development platform enabling customers to add new custom built applications through the use of customisable business process templates. Its unique wizard driven Codeless Business Application Technology (CBAT) platform has enabled customers to easily develop and build integrated business applications such as: Project Management, HR, Purchase Orders, Facilities Management systems, etc.

Cherwell is committed to "changing the rules of the game" in this industry by offering more choices to its customers. Choice in financing (subscribe or purchase); choice in deployment (hosted by the customer or Cherwell); and choice in user-interface (rich-client, browser, mobile device, or Outlook integration). All of these choices are offered in the context of a compelling value proposition – *Enterprise power without Enterprise cost and complexity.*