

# ITIL® Poster Series #56

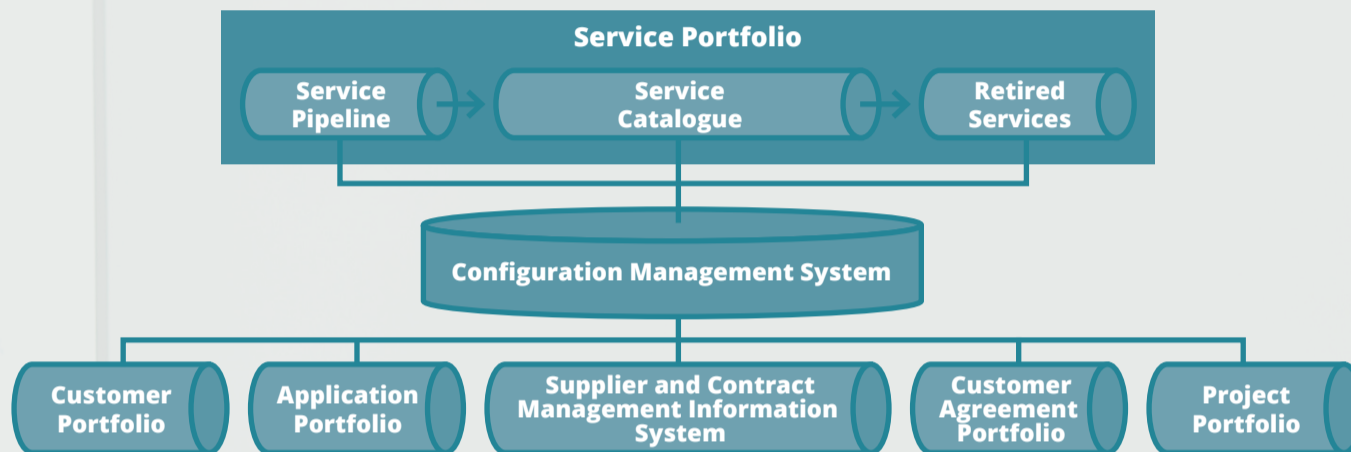
## Information Sources for the Service Portfolio

### Introduction

The service portfolio is a crucial resource for service management, documenting the pipeline for new or changed services, the current service catalogue, and the services which have been retired. The service portfolio is more than just a list of services, it represents the commitments and investments made by a service provider across all customers and market spaces. It includes third-party services, which are an integral part of service offerings to customers. In other words, the service portfolio is the complete set of services that is managed by a service provider.

The diagram shows the many other information sources that the service portfolio draws upon, to ensure that the service provider has an understanding of all the services that it provides, the investments in those services and the strategy and objectives of each one. Here we examine each of these information sources in turn.

### INFORMATION SOURCES FOR THE SERVICE PORTFOLIO



#### 1 - THE CONFIGURATION MANAGEMENT SYSTEM AND CMDBS

The CMS is a set of tools and databases that are used to manage an IT service provider's configuration data. It is maintained by configuration management and is used by all IT service management processes. It also includes information about incidents, problems, known errors, changes and releases, and may contain data about employees, suppliers, locations, business units, customers and users. The CMS includes tools for collecting, storing, managing, updating and presenting data about all configuration items and their relationships.

A configuration management database (CMDDB) is a database used to store configuration records throughout their lifecycle. The CMS maintains one or more CMDDBs, and each database stores attributes of configuration items, and relationships with other CIs.

In the context of service portfolio management the CMS records and controls data about each service, CIs that make up services, the people and tools that support services and the relationships between all of them. The service portfolio is part of the service knowledge management system (SKMS) and is based on data from

sources in the CMS. An example of a change authorization hierarchy is shown in Figure 4.5. Each organization should formally document its own change authorization hierarchy, which may be very different to the example shown here. All change authorities should be documented in the CMS.

The level at which change is authorized should rest where accountability for accepting risk and remediation exist.

Should disputes arise over change authorization or rejection, there should be a right of appeal to the higher level. Changes that have been rejected should be formally reviewed and closed.

Does this hierarchic model reflect your own organizational experience? Can you see the benefit of capturing this approach in a formal process document? What skill sets are required to enable this to take place in your organization? Is the culture of your organization able to designate authority to the appropriate management levels to support this approach?

#### 2 - THE APPLICATION PORTFOLIO

The application portfolio is used to manage applications throughout their lifecycle. The application portfolio contains key attributes of all applications. Remember, applications and services are not the same thing. A single service like an on-line shop might use several applications, or an application might provide a number of services. It is important therefore to keep the application portfolio and the service portfolio as two distinct items.

The application portfolio is usually an output from application development who use it for tracking investment in the applications. It identifies which customers use each application, and which services use each application. It links strategic service requirements and requests to specific applications or projects within application development, and enables investment in these to be tracked throughout the service lifecycle. Everything in the application portfolio should have gone through the service portfolio management process, and so every entry in the application portfolio should be linked to one or more entries in the service portfolio.

#### 3 - THE CUSTOMER PORTFOLIO

The customer portfolio is maintained by the business relationship management process; it is the business relationship manager's view of the customers who receive services from the IT service provider. Service portfolio management uses the customer portfolio to ensure that the relationship between business outcomes, customers and services is well understood. The service portfolio documents these linkages and is validated with customers through business relationship management.

#### 4 - THE CUSTOMER AGREEMENT PORTFOLIO

The customer agreement portfolio is used to manage service contracts or agreements between an IT service provider and its customers. Each IT service delivered to a customer should have a contract or other agreement that is listed in the customer agreement portfolio. Where SLAs are not being used, the very least that is required is to formally document and link customer expectations to the services provided, and get the customer to agree to what has been documented.

- External service providers use the customer agreement portfolio to track legal contractual requirements and will link them to the service portfolio and customer portfolio
- Internal service providers use the customer agreement portfolio to track SLAs and less formal agreements to ensure ongoing ability to meet customer expectations, or to prevent customer expectations from changing without a justified (and funded) need.

#### 5 - THE PROJECT PORTFOLIO

The project portfolio is used to manage projects that have been chartered (a charter is a document authorizing the project and stating its scope, terms and references). It assists in coordinating projects; ensuring objectives are met within time and cost and to specification. It prevents duplication and "scope creep", and ensures that the necessary resources are available for each project. The project portfolio is the tool used to manage both single projects and large-scale programs, consisting of multiple projects. The project portfolio is typically defined and maintained by a Project Management Office (PMO) in larger organizations. There may be a separate IT project portfolio or one which includes both business and IT projects. The project portfolio helps service portfolio management to track the status of these projects, compare the expenditure to the expected investment, and ensure that the services are being built and designed as intended.

