

F O C U S   S E R I E S



# THE SERVICE CATALOG

Rick Leopoldi & Vicky Howells



The Global Leader for the Support Industry

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## About the Sponsor



Plantronics, Inc. introduced the first lightweight communications headset in 1962 and is today the world's leading designer, manufacturer and marketer of lightweight communications headset products.

Plantronics headsets are widely used in many Fortune 500 corporations and have been featured in numerous films and high-profile events, including Neil Armstrong's historic "One small step for man" transmission from the moon in 1969.

Plantronics offers mobile headsets to address the cordless and mobile phone market, next-generation computer audio headset products for computer applications and corded and cordless headsets and systems for the office, small office/home office and contact centers.

Plantronics is a publicly held company (NYSE: PLT) headquartered in Santa Cruz, California with offices in 19 countries, including major facilities in Mexico, Tennessee, England and The Netherlands. Plantronics products are sold and supported through a worldwide network of authorized Plantronics partners, and are available through retail and consumer electronics stores.

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# About the Authors

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Rick Leopoldi is a long-time consultant who has spent the last 20 years traveling the world working with major corporations on IT infrastructure and service management projects. He has held senior positions with Amdahl/Fujitsu and Hewlett-Packard and has run his own consulting practice. Rick holds an MBA from the University of Hartford in Connecticut.

## **Vicky Howells**, *Fox IT*

Vicky Howells is a veteran support professional with practical experience using ITIL best practices in the support center. In addition to managing help desks, she has implemented and run change and problem management processes. Prior to joining Fox IT, Vicky held IT management roles in the UK Ministry of Defense.

# Chapter 1

## *Introduction*

When consumers browse a retailer's Web site or printed catalog, they have certain expectations of what they'll find. They expect to find items available for purchase described in terms they can understand accompanied by clear, concise pricing. Retailers realize that this is the basic information required and expected by their customers as they contemplate their purchases. After all, who would buy something if they didn't know in advance exactly what they were going to receive and what it was going to cost?

The same situation *should* exist for IT organizations and their customers. Unfortunately, it is quite common for IT customers to receive vaguely defined services from their IT organization without firm and transparent pricing. Often, these services are described in terms more meaningful to IT staff than the actual consumers of the services.

IT organizations are increasingly appreciating the need to remedy this situation. IT managers are driving to become business-focused and are looking to implement mechanisms to help align IT capabilities with business needs. They realize that being business-focused entails strong working relationships with their customer base—working relationships based on clearly set expectations and firm commitments. Put simply, IT organizations are moving to be able to confidently state to their customers, “This is what you'll get and this is what it costs.” The discipline of Service Level Management (SLM) plays an important part in ensuring this statement can be made with confidence.

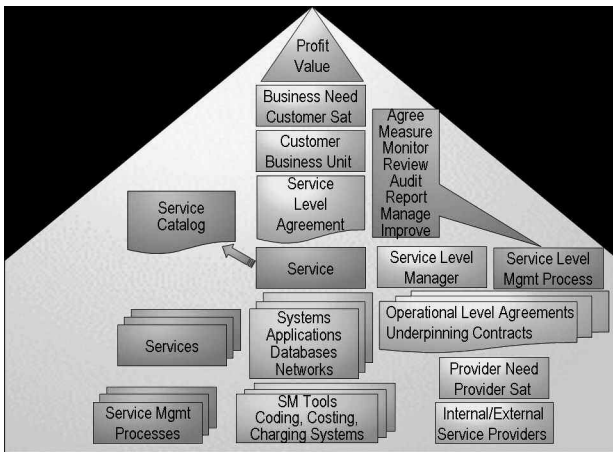
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This book explores an important, but often overlooked component of SLM: the Service Catalog. The Service Catalog documents IT services and establishes the basis for other key SLM components including Service Level Agreements (SLAs) and a charging system. This book also touches on the role of the Service Catalog in SLM, the content and structure of the Service Catalog, and provides guidance on its implementation and maintenance.

# Chapter 2

## *Service Level Management: The Basics*

A proper understanding of the role of the Service Catalog depends on a proper understanding of the overall SLM discipline (see Figure 1). The goal of SLM is to maintain and improve IT Service quality within cost justified limits based on business requirements. That goal implies that services are defined.



*Figure 1 – SLM Discipline*

SLM is an iterative process of setting an agreed level of service and monitoring and reporting on the set levels, and the Service Level Agreement (SLA) is the core mechanism for accomplishing this. When monitoring shows poor results, remedial actions are undertaken to correct the shortfall. The steady improvement of service quality and the reduction in service disruption that SLM can achieve reduces the cost/quality ratio of service provision and improves the relationship between customers and IT.

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Once undertaken with commitment, SLM will change the way the IT department views its customers and puts IT in the position to become a strategic partner to the organization. There are many important benefits to be derived from regular communications, reporting, and reviews of IT services.

As shown in Figure 1, the effective implementation of SLM relies on many individual components, one of the most important and fundamental being the Service Catalog. Like the retail catalog example cited earlier, the IT organization's Service Catalog defines, in customer-focused terms, those services IT makes available to customers. In essence, it provides a snapshot of the IT organization's capability from the customer's perspective. It also provides a focal point for aligning and driving the resource allocation and day-to-day decisions of the organization.

At a minimum, a Service Catalog should outline the "what" and "who" for each service: the top-level characteristics of IT services, the customers of each service, and the IT owners of each service.

# Chapter 3

## *Service Catalog Benefits*

The full benefit of creating a business focused Service Catalog is not always understood, which may explain why Service Catalogs seem to trail SLAs in adoption. There are, however, many tangible benefits to be accrued by implementing a Service Catalog:

- ▼ The process of developing a Service Catalog drives the IT organization to answer the basic question, “What services do we actually provide?” More fundamentally, it begs the question, “What is a service?” The answers to these questions will bring clarity as well as raise many new and important questions.
- ▼ Identifying customers of given services begins to establish alignment between what customers want and what IT provides. The definition of IT services in business terms highlights the relationships between IT services and business processes, thereby highlighting the relative criticality of IT services.
- ▼ A catalog of defined IT services puts bounds on the responsibilities of the IT organization. It is a valuable tool in managing customer expectations and allows the IT organization to say “no” to things that fall outside the bounds of their defined services. An important function of the Service Catalog is defining what is not provided as much as what is provided.
- ▼ A Service Catalog can be a valuable asset in doing business-focused impact assessments in the context of availability and continuity planning. Planners can use the Service Catalog to envision the impact in business terms of minor and major service disruptions.

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- ▼ As noted earlier, a set of defined services forms a basis for formal agreements for service commitments (SLAs) as well as the basis for service-based costing and charging schemes. Once services are properly defined, the process of establishing appropriate service levels and corresponding charges becomes easier.
- ▼ Mapping the IT infrastructure to defined services and installing event management and visualization tools provides the ability to link infrastructure events to services and visualizes the services on the desktop, showing when a service or a component of an end-to-end service is impacted.

Perhaps most importantly, the Service Catalog is a mechanism for developing and strengthening the working relationship between the IT organization and its customers. It is very important to note that the Service Catalog is a customer-focused tool; it must be written from the customer's perspective, not from IT's perspective. As such, developing the Service Catalog requires the IT organization to work closely with customers and is likely to develop deeper relationships than ever before.

### **Service Catalog and SLAs**

The characteristics of each IT service defined in a Service Catalog should be detailed in SLAs (see HDI's focus book written by Char LaBounty: *How to Establish and Maintain Service Level Agreements*). The primary purpose of the SLA is to identify the shared goals and objectives of the concerned parties. The dimensions of these shared goals and objectives are described below:

- ▼ **IT Organization:** "We agree to provide you this level of service based on an agreed-to set of guidelines."
- ▼ **Customer:** "We agree to abide by your guidelines in anticipation that you will provide us this level of service."

The content of SLAs may vary depending on the nature of the service and the IT organization (see ITIL Service Delivery, section 4.4.1.) Generally, SLAs contain at the least the following information:

- ▼ Minimum requirements for a service such as service description, business alignment, service lifecycle, throughput, availability, response times, support services, customer responsibilities, and authorization.
- ▼ Other possible details such as inputs and outputs, contingency arrangements, review procedures, change procedures, and housekeeping.
- ▼ Some general service details such as related Operating Level Agreements (OLAs), and underpinning contracts with 3rd party vendors where these exist.

### **Initiating a Service Catalog Project**

Like all projects, implementing a Service Catalog requires a solid understanding of goals and objectives and the overarching business drivers for these goals and objectives. Some of the questions to consider at this stage are:

- ▼ What are the top benefits we want to achieve with the Service Catalog?
- ▼ What is the scope of the Service Catalog? What level of detail is required?
- ▼ Have we defined any IT services? If so, how are these definitions being used?
- ▼ Were customers included in the process of defining these services?

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- ▼ How will we tie IT services back to our customers and their business processes?
- ▼ What are our success criteria and key performance indicators?  
How will we know that the Service Catalog is doing what we want?

### **Relating Business Processes to IT Services**

Most business have established and defined business processes and procedures. These usually exist at the departmental or business unit level and will ideally map out the most important day-to-day activities of the department or business unit.

It is likely that major business processes span departments and business units. If end-to-end business processes have been mapped, it will be easier and quicker to relate those end-to-end processes with supporting IT services.

IT business processes will enable you to quickly understand the function of the IT Department, how it is structured and the workflows. These should aid your knowledge when defining IT/Operational Services and Underpinning Services.

Analyzing an organization's tools and processes will give a basic knowledge of how each organizational unit operates and a baseline of the current situation, but should not be used as a substitute for actually talking to the business units.

# Chapter 4

## Service Catalog Structure

Defining a hierarchical data model for the Service Catalog based on the organization's structure establishes a set of building blocks that all current and future services can adhere to. Figure 2 shows an example of a Service Catalog structure.

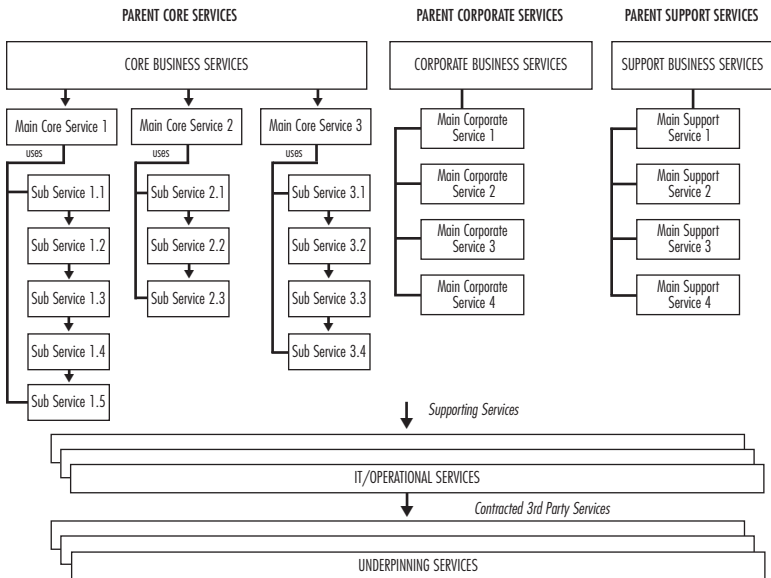


Figure 2 – Example Service Catalog Structure

The top level presents IT Business Services and should include only a small number of parent services to ensure ease of maintenance and use. The model should take into account the differences between Core IT Business Services (those services

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which literally are the business), the supporting Corporate IT Business Services (e.g. HR and Finance), and Supporting IT Business Services such as e-mail and desktop services.

Each parent service generally contains a number of main services, and if part of an end-to-end service, each main service will be the parent service for a number of sub-services. Sub-services would normally be the end-to-end Core Business Services.

Defining a model in this manner helps ensure the sustainability of current services and provides a platform for doing so for future services. This also gives a structure for establishing a model for defining and maintaining SLAs and OLAs.

The initial data model should be the centerpiece for organizing discussions with the business units. This helps ensure that they are involved in defining what IT Business Services they use and makes certain the names of each Service are directed and meaningful.

### **Developing and Implementing a Service Catalog**

The following includes steps for developing and implementing a Service Catalog:

1. *Develop and document Service Level Objectives (SLOs).* Focus on internal services such as the technology level for performance and availability. Examples are, network, server response, and “up-time.” Over time these objectives should be deepened in breath, scope, and detail, dealing with a customer business level focus for transactions and the component areas that comprise it.
2. *Develop and document formal Service Level Agreements with customers.* In some cases, SLAs may be replaced with a Service Catalog that defines the same information. The Service Catalog then becomes a tool for the IT support organization to establish its own measurable objectives. (These objectives

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identify what the IT staff must do to support the terms of the agreements.) Based on the service level objectives listed above, these agreements will be “contracts” of guaranteed levels of performance and availability. These agreements need to be reviewed and renegotiated as needed (typically on a cyclic basis, e.g., annually). As the scope, breadth, and detailed level of the SLOs expand so too should the SLAs. **NOTE:** It is important that both the SLOs and SLAs are realistic, measurable, achievable, able to be monitored, and agreed to by both IT and the customers.

3. *Instantiate the necessary hardware and software technologies to evaluate, monitor, and report on performance and availability. Consider off-the-shelf software and the associated hardware initially for practical reasons of maintenance, support, and resource requirements.*
4. *Establish the necessary methods and processes for developing, publishing, and maintaining the Service and Operating Level Objectives and Agreements.*
5. *Establish evaluation, monitoring, and reporting mechanisms for SLOs and SLAs.*
6. *Assign service managers (and associated resources if necessary) whose primary role and responsibility will be to support Service Level Management enterprise-wide.*
7. *Rollout the complete Service Catalog and verify it with the user community. Assign the responsibility of maintaining and enhancing the Service Catalog as well.*
8. *Enhance the Service Catalog. Integrate the Service Catalog with Service Level Agreements (SLAs) and Service Level Objectives (SLOs) and ensure that it has a business and customer service focus.*

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9. Fully develop the other inter-related areas of IT Service Management as needed (i.e., Incident Management, Problem Management). This helps ensure that an optimized maturity level is attained as uniformly as possible.

See **Appendix A** at the back of this book for a sample Service Catalog outline. The outline covers the precise elements needed in your Service Catalog.

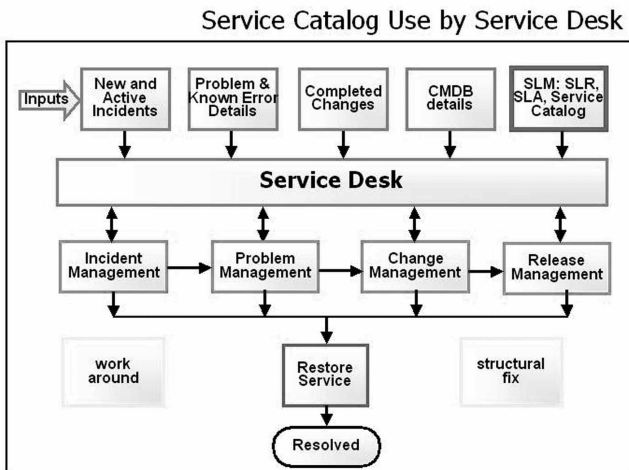
### **Important Considerations in Developing and Maintaining the Service Catalog**

To ensure the Service Catalog is an effective tool for setting and managing expectations and perceptions, consider the following:

- ▼ Take the customer viewpoint and mindset in defining IT services. Make sure that the services defined in the catalog are perceived as services to those who actually use them.
- ▼ Ensure that the Service Catalog is written in terms that are meaningful to customers. Don't use any potentially confusing jargon or terminology.
- ▼ Pay attention to the presentation of the information. Whether the Service Catalog is a physical document or resides at a Web site, take appropriate steps to make sure the presentation is user-friendly, clear, and easy to navigate.
- ▼ Keep it simple. Don't over-complicate the service structure.

# Chapter 5

## *The Use of the Service Catalog by the Service Desk*



*Figure 3 – Service Catalog Use by Service Desk*

Service Catalogs are not just for the IT organization as a whole. It is just as important a tool at the organizational or department level. For example, the Service Desk can use the Service Catalog to outline its customers and services. It's a good idea to draft Service Catalogs for each IT organizational unit as well as for IT as a whole; it's always revealing and useful to compare where services and customers do and do not add up.

As shown in Figure 3, knowledge of incidents, problems, errors, changes, and the configuration help to maximize the role that the

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Service Desk plays in resolving incidents and restoring service in the timeliest manner possible with minimal disruption to the user and the business.

Service Level Requirements (SLRs), SLAs, and the information contained in the Service Catalog play a critical role in the effectiveness of the services provided by the Service Desk function. From the Service Catalog, information is supplied about the business function, its role within the organization, its IT profile, characteristics, and requirements in addition to all the appropriate and necessary contact information.

### **Marketing the Service Catalog**

Like the retail catalog example, the Service Catalog is in part a marketing tool. While the ultimate goal may not be to increase customers' consumption of IT services, one important goal is to improve communication and understanding between the IT organization and its customers about what services are provided. A good Service Catalog can also be a confidence builder with customers, inspiring customers' confidence in IT's ability to meet commitments. As such, the Service catalog should be marketed by the IT organization to customers with the message that this tool is intended to improve service quality and reduce cost over the long term.

# Chapter 6

## *Conclusion*

Service Level Management is much more than writing SLAs. Developing, maintaining, and using a Service Catalog is a critical component to the process. Once undertaken with commitment, a Service Catalog can change the way IT views its customers and in turn, puts IT in the position to become a strategic partner to the organization.

# Appendix A

## *Sample Service Catalog Outline*

### **Service Catalog Title**

Version Number, Create Date, and Amendment Date (or document change log)

### **Table of Contents**

**Foreword**—A brief introduction of the service provider and the service catalog, usually written by an IT executive to demonstrate the provider’s commitment to customer and user satisfaction.

**Service Provider Profile**—A brief, customer/user-focused overview of the service provider which provides background and context.

*The following should be repeated for each individual service:*

**Service Name**—A simple descriptor for the service.

**Service Description**—An abstract-level description of the service, written in language customers and users will understand.

**Service Manager**—Contact information for the individual within the provider organization responsible for this service including location, e-mail, telephone, and Web site (if applicable).

**Service Specifications**—Abstract-level descriptions of the following:

- Default, Optional, and Excluded Elements
- Service Hours
- Service Availability
- Service Performance
- User and Customer Support
- Activation, Changes, and Termination
- Charging

**Current Customers/Users**—A listing of (or a reference to) current customers and users of the service.

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