

Are you a Lifecycle or a Capability Expert?

Your Path to ITIL® Expert

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Abstract

In this article, we discuss the different paths to ITIL expert, looking at both the Lifecycle and Capability paths, the target audience for each path, typical roles and responsibilities, and the reasons why you might want to choose the capability or lifecycle path. We will also look at the benefits of the mix and match approach.



Your ITIL Future is Bright and Colorful

The Information Technology Infrastructure Library or ITIL® is a great source of information to help IT organizations to implement processes, drive consistency and quality of services. The ITIL V3 Foundations course is the entry point into the certification realm and provides just enough information to talk about ITIL but not nearly enough to implement or manage ITIL in complex situations. Often students scramble to memorize definitions and key concepts just to pass the test and they are left to wonder, “What is next? How do I use this information to improve my work environment?” The answer is not that easy. Although you could pick up a book and begin reading more about ITIL, it is often more helpful to attend an Intermediate training class where you not only study the material at a more in-depth level, but you get to learn from your fellow students and your instructor.

Bring Your “A” Game and Your Practical Experience

Practical experience is one factor that is incredibly important to your success. It helps you to not just understand how IT organizations work, but when you enter into a classroom with a few years of experience in IT, you get much more out of your learning experience. Imagine if your instructor

was speaking about the importance of Service Level Agreement structures. With no experience in IT, you might view the structures as three very plausible options for your organization. Practical experience tells you that although there are three options, it doesn't mean that each option would work in your environment. Practical experience provides a basis to explore, challenge, and engage in your learning experience. Prior to moving onto the Intermediate level, make sure you bring some practical experience into the classroom.

What if I Have no Practical Experience?

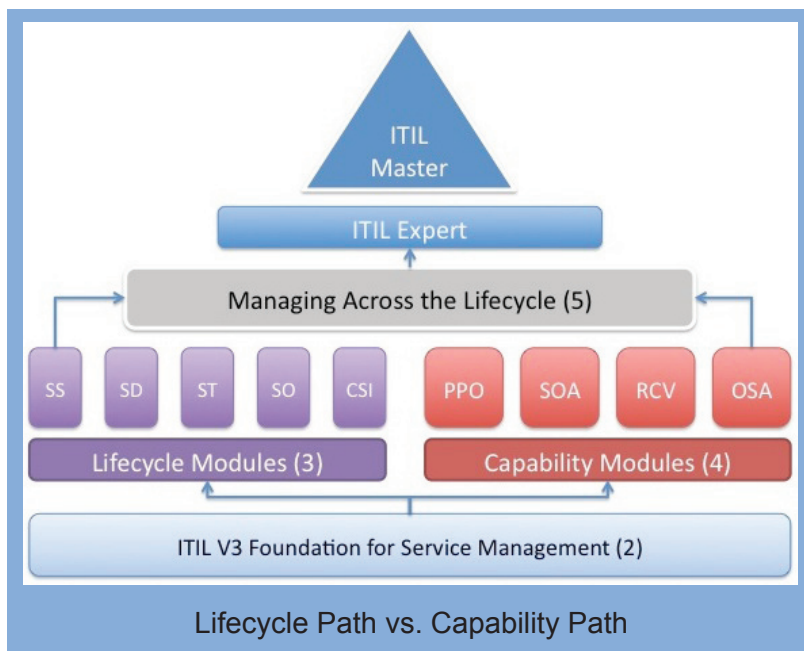
Of course, as soon as you hear that you have to wait until you have some practical experience, the next question you will hear is, "What if I have no practical experience? Can I not learn just as much from taking the courses anyway?" Good instructors will help you to bridge the gap. But the learning curve is steep. It is possible to take the Intermediate classes without the practical experiences with one small caveat - don't think that taking the classes means that you have enough knowledge to implement the framework. Give yourself some time in the work environment to explore the ideas and try things out. You won't be a master over night and you still need to pick up some practical experience. I have seen many ITIL

implementations fail even with experienced ITIL experts at the helm. Although you may develop a good solid foundation of book knowledge, it is the time in the field applying and learning that drives the success in implementing ITIL.

Just Completed Your ITIL V3 Foundation Course - Now What?

The Foundations course is like learning a second language. When you study a foreign language, you begin by memorizing key words and key phrases so that you can begin conversing. The ITIL Foundations course is very similar. The course focuses on key concepts, models, and processes. When you develop an understanding of ITIL basics then you will be able to have a conversation and discuss the importance of ITIL within your organization.

However, the Foundations course was never meant for you to use the basic knowledge to implement ITIL into the organization. The level of detail is not where you need it to be to figure out how to implement or manage ITIL in a complex situation. The ITIL Foundations course is all about getting your organization on the same page so you can talk about how to leverage ITIL. The Foundation level of knowledge is critical and it is a mandatory prerequisite for getting into the Intermediate level.



The Intermediate level is where the true learning begins. The courses do not focus so much on memorization, but analyzing and looking at concepts to understand how they may work in a particular environment.

The great news is that with V3 there are many more options for courses after the Foundations course is complete. But the path you take should be carefully planned and based upon your requirements for your job, your career, and your organization.

ITIL Intermediate Offerings

When you complete the ITIL Foundations course and successfully pass the exam, you will have earned 2 points towards the ITIL Expert certification. Currently there are three defined paths, the lifecycle path, the capability path, and the mix and match approach.

The Lifecycle Stream has five individual certifications, each based on one of the Service Lifecycle phases or books. The courses are Service Strategy (SS), Service Design (SD), Service Transition (ST), Service Operation (SO), and Continual Service Improvement (CSI). Each of these courses will last between 3-4 days and you earn 3 additional units per course that you successfully pass.

The Capability stream has four individual certifications, each based on a core set of capabilities that span across the ITIL books. The courses are Planning, Protection & Optimization (PPO), Service Offerings & Agreements (SOA), Release Control & Validate (RCV), and Operational Support & Analysis (OSA). Each of these courses will last 4-5 days and you earn 4 additional units per course that you successfully pass.

At the Intermediate level you have many options. You can go all Lifecycle courses, all Capability courses or you can mix and match depending upon what you need to learn to support your business initiatives and career growth.

Keep in mind that the Lifecycle and Capability courses do have a significant amount of overlap of material. For example if you take Service Design and then decide to take PPO, you will be duplicating a vast amount of the information covered in Service Design. This may earn you 7 total points upon completion however, it is not a good representation of the core content across the Service Lifecycle. Full coverage of the Service Lifecycle will be extremely important as you move into the Managing Across the Lifecycle (MALC) course. If there is an area that you haven't covered prior to taking the MALC course, this will be a



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significant weakness going into the more difficult capstone course. You want to prepare yourself the best way possible prior to taking this course. If you are missing key areas of knowledge, it will be like a three legged table, your knowledge will not be in balance prior to taking this course. In order to get to ITIL Expert, you want to adequately prepare yourself at the Intermediate level.

You need 22 credits to get the ITIL Expert certification. This means that after the 2 credits for Foundations, you will need an additional 15 credits to bring your total up to 17 prior to taking MALC. MALC is worth an additional 5 points which will then bring the total to 22 and you will be deemed an ITIL Expert.

Lifecycle or Capability Stream?

The Lifecycle Stream has five individual certifications or modules, each based on one of the ITIL Service Lifecycle phases:

- Service Strategy (SS)
- Service Design (SD)
- Service Transition (ST)
- Service Operation (SO)
- Continual Service Improvement (CSI)

Each module of the Lifecycle series covers an Introduction to the Service Lifecycle, the principles, processes, functions and activities within that stage of the ITIL Service Management Lifecycle, along with technology and implementation considerations.

The Lifecycle modules expose individuals to essential aspects of Management, Marketing, Operations, and Organizational Management. The Lifecycle stream is useful to appreciate the concerns of the business counterparts within a Service Management context.

The Candidates that go the Lifecycle stream are looking to focus on the Lifecycle itself. Processes and process elements are covered but they are not covered at the same level of detail as in the capability stream. But what is covered in the lifecycle stream in addition to the processes is policy, organizational structure, and all of the key practices that go into making the phase of the Lifecycle successful.

If you have a job title such as Director of Operations or Director of Transition, then your focus will most likely be in a phase of the Service Lifecycle. It might make sense for you to take the Lifecycle Stream to better understand the core components that make the phase of the lifecycle more successful, and how phases work together to fulfill the Service Lifecycle.

If I were the Director of Operations, I would most likely start with Service Operation in order to get a core set of knowledge of how to make Service Operation successful in my environment. Then I would also want to take and understand Service Transition so that I can see what is happening right before a service comes into the live environment, and then work to build the bridges to make the transition more successful in operations.

The Capability Stream has four individual certifications, which focus on a series of clustered process activities, their execution and use throughout specific phases of the ITIL Service Lifecycle. This set of courses is much more focused on candidates who wish to gain a deep level understanding of V3 processes and roles, how they are implemented, and how they interact.

Four individual certifications, which focus on a series of clustered process activities, their execution and use throughout specific phases of the ITIL Service Lifecycle as follows:

- Service Offerings and Agreements (SO&A): Primarily covering Service Strategy and Design processes, including; Portfolio, Service Level, Service Catalogue, Demand, Supplier and Financial Management
- Release, Control and Validation (RC&V): Primarily covering Service Transition and Operation processes, including; Change, Release and Deployment, Service Validation and Testing, Service Asset and Configuration, Knowledge Management, Request Management, and Service Evaluation
- Operational Support and Analysis (OS&A): Primarily covering Service Operation and Continual Service Improvement processes, including; Event, Incident, Request, Problem, Access, Service Desk, Technical, IT Operations and Application Management
- Planning, Protection and Optimization (PP&O): Primarily covering Service Design processes Capacity, Availability, Continuity, Security, Demand and Risk Management

If I am an Incident Management process owner, I will want to know about Incident Management but also how Incident Management relates to Problem Management and how the two processes work together to be successful. I would also need to know how to manage Service Requests and Access Management. In the Capability stream, there is focus on the processes themselves and the interfaces between the processes. The clustering is really to put together the processes that have these strong dependencies. The courses do not focus on one phase of the lifecycle, but instead cover processes from one or more phases of the lifecycle in order to better understand and explore these relationships.

OSA for example, explores the processes in

Service Operation but it also looks at the role of CSI in the identification of improvements and the measurement of data in the operational environment. And how we leverage CSI in operation in order to gather all the information we need to make solid decisions about how to improve what we do within IT. Candidates going the capability path really want to have a deep understanding of the processes and the roles involved in those processes, how those processes are implemented and how they interact with other processes in the ITIL framework.

There is a different level of analysis that takes place in the two streams. The lifecycle courses are more strategic, and the capability courses are more tactical or operational with a hands on approach to the operation of the IT environment. Both paths lead to Managing Across the Lifecycle (MALC).

ITIL V3 Capstone - MALC



**Managing Across the Lifecycle is no Picnic
Come Well prepared**

After you have completed at least 15 (17 with Foundations) points at the Intermediate level, you are off to Managing Across the Lifecycle. This class puts all of the components of the Service Lifecycle back together again and focuses on how to

implement and manage ITIL in complex situations. Candidates will leverage ancillary knowledge required to implement and manage the Lifecycle practices.

MALC is where the greatest learning occurs for students. It is one thing to study the framework and pick it apart into its isolated pieces and principles. It is another thing to put it all back together. In MALC, it isn't enough to know how Incident Management works, you need to know how Incident Management creates value for the whole lifecycle. Its about putting all these things back together and understanding the intricacies about the relationships of everything in the Service Lifecycle.

This course is more of the consultative view. For example, let me take the concept of an assessment from CSI and apply it to this scenario where I'm looking at many different things. I may need to assess people, process **and** tools but I also may need to evaluate risk and organizational structure in a scenario. This requires me to use multiple different topics and concepts from different phases of the Service Lifecycle to identify the appropriate course of action.

The concepts that you cover in MALC, focus on the Service Lifecycle as a whole and how to make all of it successful in your environment. After completing this course, IT professionals feel confident to implement or modify an existing ITIL implementation by successfully leveraging the ITIL concepts within their environment.

Are you a Lifecycle or Capability Expert?

The Lifecycle courses have a lot to offer those students who need to look at the overall performance of the organization and identify ways to improve. If you take the Lifecycle path, one value add is the Service Strategy course. Service Strategy provides a significant leap in our understanding of how to make IT a strategic asset of the business. This positioning of the IT organization as a strategic asset will help many organizations to establish better strategy and

alignment to the needs of the business. This is a huge value add in many organizations.

Another lifecycle course that is hugely valuable is Continual Service Improvement. Here we learn the skills that are necessary to evaluate and improve what exists in our IT environment today. Most organizations have some level of success with ITIL, even if they didn't know it was ITIL. This course helps them turn pain points into success, identify how to tweak an existing implementation of a process, and how to improve not just a service or a process, but also how to work together more successfully as an organization.

The lifecycle courses are shorter and focused on a holistic view on the phase of the lifecycle. In these courses you will cover organization structure, the role of technology, implementation and policy as it relates to the phase the lifecycle.

The Capability courses are careful mappings and combinations of processes. The most popular course is SOA. The course covers Service Portfolio Management, Service Level Management, Service Catalog Management, Demand Management, Supplier Management and Financial Management. This is a great course that is centered on how to position the IT organization to deliver value to the customer. Not only are we positioning ourselves from a strategic view of how to align ourselves with the business, but we also see how the key processes are focused on maintaining that relationship with the business. A lot of great conversations develop in this course like "How should we market our services to the different customers? How do we capture our services in the Service Catalog? and What type of structure for Service Level Agreements should we have?" This is a great course focused on creating a stronger, more valuable relationship with the business.

Another valuable capability course is RCV. Most of the processes that are covered are in the Service Transition phase with the exception of Request

Fulfillment from Service Operation. Here we look at Service Transition from a process perspective. Again, the course has great dialog like: "How do we make Change Management successful? How does the handoff to Release and Deployment work? and How do we develop the skills to effectively package a Release?" This course generates great dialog on how to manage transition correctly, an area that can be a big pain point for many organizations.

But I like the combination of bringing Request Fulfillment into RCV because many organizations struggle with what is the difference between a standard change (something that is documented and low manageable risk) and a service request (which is documented, customer facing, low risk and has financial approval). There is great dialog around: "What is the difference? How do we set the scope? and What is right for our organization?" Again a very powerful course, with great knowledge on how to go back and make a difference in your environment in the Service Transition processes.

All
Lifecycle
modules

All
Capability
modules

Mix & Match
of Lifecycle and
Capability modules

Which Path is Right for You?

There are three basic choices: all lifecycle, all capability or mix and match. For most people it is best to stick with all capability or all lifecycle.

Lifecycle Modules	Capability Modules
Management of lifecycle	Proficiency in an ITIL capability
Focused on the implementation of processes in a lifecycle (strategic)	Focused on practitioner capabilities in a specific area
Requires experience in managing changing organization	Requires experience in metrics and KPIs
Creation of management reporting structures	Creation of management reports
Define and prioritize improvements	Manage improvements
Works on the processes	Works in the process
Covers an entire lifecycle stage	May cross lifecycle stages based on objectives and metrics

This gives you the best set of core knowledge across the lifecycle in order to prepare for MALC. The Lifecycle and Capability streams are well developed and will provide you with an adequate background in either the lifecycle or capabilities within the framework.

What if you are someone who has a core set of knowledge in one domain of the ITIL Lifecycle and you want to tunnel into a much greater depth in one area, but don't necessarily want that same level of detail in the other key areas. Does it make sense to mix and match? Please remember, that you need 22 credits to reach ITIL Expert Level but more importantly you need a balanced set of knowledge about the entire Service Lifecycle.

All Lifecycle Courses (Option A - 22 Credits)

When should you pick the Lifecycle Stream? If you want to:

- Provide guidance towards implementation of ITSM in your organization
- Ensure a balance of knowledge across all stages of the Service Lifecycle
- Focus on the management of the lifecycle
- Focus on the implementation of processes in a lifecycle (strategic) much like program management
- Create of management structures
- Develop experience in managing change throughout the organization
- Define improvement opportunities and prioritize them
- Work on the process

Examples of roles include Process owners, Lifecycle stage managers, ITSM implementation teams, Consultants, and Stakeholders.

All Capability Courses (Option B - 23 Credits)

When should you pick the Capability Stream? If you want to:

- Better understand the ITIL Processes, their execution, and improvement
- Develop proficiency in an ITIL capability
- Focus on the practitioner capabilities in a specific area
- Better understand how to manage the process in the IT environment
- Focus on management through metrics and KPIs
- Cover all areas of the Service Lifecycle
- Create management reports
- Manage improvements
- Work in the process

Examples of roles include Process Managers, Operational Staff, Process Consultants, IT Practitioners and those who execute the daily activities of one or more processes.

Hybrid Approach (Option E - 25 Credits)

Option E is the only Hybrid approach I would recommend. CSI is one of the most vital courses for any student that wants to become an ITIL Expert. If you take CSI and want to leverage the detailed knowledge in the Capability Stream, then Option E provides the most content from the Capability path while not duplicating course work AND you get CSI. Instead of taking PPO take Service Design. When you look at the mappings of PPO and SOA you will see some content is similar. If you just substitute in

Possible Selection Options to achieve ITIL Expert Certification	V3 FND	V3 CAPABILITY STREAM				V3 LIFECYCLE STREAM					CAPSTONE	TOTAL NUMBER OF CREDITS
	FOUNDATION CERTIFICATE IN IT SERVICE MANAGEMENT	Planning, Protection & Optimization	Service Offerings & Agreements	Release, Control & Validation	Operational Support & Analysis	SERVICE STRATEGY	SERVICE DESIGN	SERVICE TRANSITION	SERVICE OPERATION	CONTINUAL SERVICE IMPROVEMENT	MANAGING ACROSS THE LIFECYCLE	
Candidates with no prior ITIL certification												
Option A	2	4	4	4	4						5	23
Option B	2					3	3	3	3	3	5	22
Option C	2	4	4	x	x	x	x	3	3	3	5	24
Option D	2	4	4	4	x	x	x	x	3	3	5	25
Option E	2	x	4	4	4	x	3	x	x	3	5	25
Option F	2	x	x	4	4	3	3	x	x	3	5	24

Service Design for PPO, you will not miss much. But what you do get out of CSI is hugely valuable for you to be able to manage an improvement to your existing environment especially around process improvement. This approach leverages the best of both the Capability and Lifecycle Streams.

If you pick this path, you need to stick with it. The path provides the best exposure to the content, it prepares you the most successfully for MALC, but it is also 25 credits. If you begin with Option E, you cannot just stop after you take 17 credits. This will leave you with large gaps in your knowledge and potentially decrease your ability to complete MALC successfully. Choose this path if you want to:

- Maximize your knowledge of the Service Lifecycle
- Fully prepare yourself for the MALC capstone course
- Cover CSI with the Capability Stream
- Manage complex ITIL implementations
- Work both on and in the process
- Develop management reporting

Examples of roles include Managing Consultants, Project Managers, Program Managers, Service Level Managers, Business Analysts, and Process Consultants.

The Final Word

Option A, the all capability path, is the most popular path due to the need to increase the skill sets of staff in order to make processes more successful. If you have successfully implemented many of the ITIL processes then it makes sense to go the lifecycle path, Option B. Option E is probably the best option for preparing you to successfully pass the Managing Across the Lifecycle course than any other path, especially if you are going to be a consultant managing ITIL implementations in complex environments.

No matter what option you choose, ITIL will help any IT practitioner to open their eyes and see the IT world from a new and different perspective. ITIL is not just about speaking a new language, it is all about enabling the people to take action, to elevate the IT organization to a new level, and become a strategic asset of the business. Now that you have finished your ITIL Foundation class it is time to choose your ITIL path to Expert and let the learning begin.

Julie L. Mohr is a Principle Research Analyst and Author at BlueprintAudits.com. She is a passionate organizational change agent providing imaginative insight and dynamic leadership to transform organizations into best practice, customer-focused environments. She has empowered over 50 organizations including many Fortune 100 companies through Knowledge Management, ITSM, IT Governance, organization enhancements, process re-engineering and service level management. Julie has developed a support organization maturity model and audit methodology utilized by thousands of organizations worldwide to identify weaknesses, develop improvement plans and implement IT Governance. Julie is an active contributor to the future development of the industry through speaking engagements at conferences worldwide, researching industry trends and publishing over 150 articles on best practices. Julie is the author of Mapping Support Processes: Blueprint for Success, The Help Desk Audit: Blueprint for Success, The Help Desk Toolkit: Companion CD and The Help Desk Dictionary, and maintains an informative industry portal for practitioners at www.blueprintaudits.com. Julie is a certified Helpdesk Director and certified ITIL® Service Manager/Expert and holds the prestigious GCEIT Certification. She is an expert instructor in multiple industry frameworks including ITSM, KCS and COBIT. She is currently serving as VP of Membership for the itSMF LIG in Sacramento, a faculty member with HDI and participated on the HDI Support Center Certification (SCC) standards committee. She is a member of IEEE Computer Society, National Speakers Association, American Society for Quality, Association for Computing Machinery, ISACA, PMI, HDI, itSMF and the Association of Support Professionals. Julie is a graduate of The Ohio State University with a Bachelor of Science degree in Computer Science.

