Input for the 'AXELOS Best Management Practice Portfolio – Future Opportunities' Workshop on July 16 – 18, 2013

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Trainings and Exams

Foundation level

Over the years, I've encountered many a dissatisfied delegate, who have chosen their training provider based on the price and the 'accredited training materials' stamp. In reality, the result was poor. The trainer had little or no training skills and the knowledge of ITIL was based on literal approach to books with very little insight or even proper understanding of the material.

The syllabus for ITIL Foundation covers a large amount of material and despite not focusing on the details for most of the topics, it is still a lot of information for the delegates to process. The expectation among both the managers who pay for the courses and exams, and the delegates, is that the delegates will pass the exam at the end of the course. This has put a lot of pressure on the ATOs and trainers and has resulted in too much focus on the exam during the course. In some cases, the course has become a drill for the exam, not an effective explanation of the topics.

Passing the exam is also considered enough for a delegate to come back to their organization the next day and start 'implementing' ITIL. The expectations are inflated, but it drives people to the courses and to take the exam, which suits (some of) the ATOs. Expected outcome for the delegate should be to understand the concepts – which they do, until they forget most of them a few weeks after the exam. The expected business case for their manager is that those people can now translate the ITIL books (which have been bought but not necessarily opened) into usable nuggets of information and well-defined 'implementation' steps, but this rarely happens due to the shallow approach during the course. The expected business case for the organization, if there is any, is based on wishful thinking and inflated expectations – in a traditional organizations, all IT-related issues will not disappear after each and every IT employee has passed the Foundation exam.

I believe the ITIL Foundation syllabus should be revised and the classroom-based ITIL Foundation course abandoned. There should be only one version of the training materials for the new, revised version of Foundation (as the 1st level introduction course), owned and developed by Axelos. E-learning, with materials supported by examples and control questions, should be considered as the default option. I've personally used materials from several different ATOs when delivering trainings and all of these have their good and bad sides … and depending on the ATO, the feedback from the trainers and the delegates can, but is not always incorporated. Focusing improvement activities on one set of materials and making these suitable for different learning styles and different cultures is more efficient than for each of the ATOs trying to do the same with theirs.

Tailored trainings supporting the Foundation module can of course be provided – either Axelos-recommended options (e.g. Polestar-like simulation) or ATO-developed exercises, case studies, etc. The core set of materials on which the exam is based would still be only one.

Practitioner level

On the Practitioner level, the courses should have either more modularisation to allow for more efficient use of one's time, or have very clear paths to answer the question "Which Practitioner-level course should I as a [insert role here] take?"

No centrally developed materials are needed, as these trainings should be more hands-on and both the structure and the delivery depend heavily on the ATO and/or the trainer. Attending a classroom training should be a prerequisite for taking a Practitioner exam – it would be up to the organisation or the delegate to choose the best-fitting offering amongst the ones on the market. The exams would focus on the application of the theory and methods, rather than just knowing the theory.

Additional training materials and models can be developed and offered, for a fee, by Axelos.

Higher level

The courses and exams on the level above the Practitioner can be workshop-like and similar to ITIL Service Manager (v2) exams. It can be expected that all delegates know the theory and have some experience in applying it. Various case studies can be presented and practical problems introduced – with more involvement from the ITSM community there should be plenty. The examination can be an in-course assessment, or a combination of a more complex case study and an in-course assessment.

Additional certifications

A model for additional, 'honorary' certifications should be considered to improve community involvement. This model can have several paths and levels and is awarded for one's input to the community – peer-reviewed articles (more on these below), conference presentations (unique content, not number of times presented), extensions to the theory (e.g. models), trainings delivered, etc.

Trainer accreditation

At the moment, almost anyone can claim to be an ITIL trainer, some results of which were described above. I believe all trainers, for all levels of ITIL trainings, should be accredited. On Foundation level, the delivery of Axelos-developed supporting trainings (simulations, etc.) can be accredited. On Practitioner level, all trainers should pass a trainer exam in addition to getting well-above-average results on their own exams. Someone being really good at what they do does not automatically make them a good trainer for that subject – the accreditation should make sure that when people do attend a classroom training, they are coached by someone who both knows the theory and knows how to teach. Resolving conflicts, dealing with (negative) feedback, engaging different learning styles – these are just a few examples of what a good trainer needs to have skills for.

Both the certification and the accreditation programmes have to be transparent, both for the people being certified/accredited, and those paying for this – managers sending their people to the trainings, organisations choosing their training partners, ATOs paying the fees.

Framework and Books

I agree with Barclay[1] that one approach to simplify the books and make them more useful is to focus on core principles which are of course subject to improvement, but will not change often. Additional information can be provided as complementary books or articles. Each principle or a set of principles should have explanations, examples and case studies attached. All of this can of course be delivered

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[1] http://www.barclayrae.com/wp-content/uploads/2013/07/Barclay-Rae-Consulting-input-to-ITIL-JV.pdf

as printed material, but indeed, from the practical point of view, keeping this up to date begs for a different model than heavy glossy books.

What needs to be kept in mind is that not all principles that seem to be universal in the context of 'old IT' might apply for 'new IT' that is more risk-averse and considers failure to be a norm rather than an exception; or even for different business models where innovation can be valued higher than stability.

On one hand, the five core books try to cover too much, while on the other, they do not cover enough. For most questions, there is no one answer – "What is the best leadership style?", "How big should my team be?", "What are the risks I can tolerate?" etc. For many of these areas, lots of books have been written and there is little or no reason to either refer to only one source or try and replicate an approach or a combination of models in the ITIL books.

Instead of *the* way, these complementary materials should describe options, with pros and cons, real-life examples and real data where possible. There are many ways how to design and create a 24/7 global support team, for example. Why not expand the knowledge base with peer-reviewed articles on the subject, where the approach taken, the reasons for this approach and the outcome of the approach are described. When confronted with the task, one can review this part of the knowledge base and then, relying on facts rather than assumptions, design and defend their own model. Gathering case studies and data as an individual can be daunting, if not an impossible task; making all this available as a central organisation is a much more suitable task for Axelos.

The amount of articles about various ITIL topics is massive. As with any subject, there are good (useful, truthful) and bad (useless, biased, and self-serving) articles. While one can certainly find dubious articles in the peer-reviewed academic publications, this method has, in most cases, been successful in maintaining the quality. Stagnation, a common worry in the scientific community, is not an issue, at least not at this point – there is perhaps not that much formerly unknown to discover in the ITSM world, while there certainly is much to learn about how to apply the knowledge already gathered.

Current content in the books can feel as outdated for some types of organisations – for example those in the Bay Area, where a 'mainframe' has never been seen or perhaps even heard of. The principles behind the ITIL content, I feel, are less sensitive to the type of organisation. Aforementioned complementary, peer-reviewed articles can explain how these principles can be applied in e.g. a traditional organisation, in an international corporation or in a DevOps-oriented start-up. Journeys from A to B (e.g. from not automated, non-collaborative environment to a largely automated, collaborative organisation) and lessons learned can be shared. Not all organisations should (or even can) follow the same path – making the decision "Is this for me?" needs more support, which ITIL could provide.

Community collaboration

Internationally, itSMF has been the key partner in popularising and raising awareness of ITIL. This is still done by every local chapter (54 to date) and the number of practitioners engaged through this channel is impressive. Over the years itSMF has faced problems, as any organisation of this size inevitably will, but the will is strong. I believe concrete model of cooperation between itSMF and Axelos needs to be designed and agreed, to leverage the existing links to the ITSM community. itSMF is also present in Asia and in emerging economies, providing an instant two-way channel for engagement.

Aforementioned additional ('honorary') certifications is another way to engage with practitioners, globally. While the number of people behind each ITIL publication is large, this has been a rather closed group. Providing ways to acknowledge practitioners' input and raise their professional visibility will help.

There are several other organisations, such as ISACA for example, that deal with areas closely related and to and sometimes crossing with ITIL. Cooperation models for content, publications and events can and should be agreed with them.

Other frameworks and philosophies, either alternative or additional to ITIL have been gaining popularity over the years – COBIT, USMBOK, Lean IT and DevOps, to name only a few. The communities behind some of these are large and extremely active – where the ITIL/ITSM community might be weak, they are strong. There is a very clear lack of bridges between ITIL and these other frameworks, leading to confusion and innumerable articles opposing ITIL with these (e.g. "Will DevOps mean the death of ITIL?") or widening the gap (e.g. "ITIL or COBIT – choose the correct framework"). By having a solid foundation (the principles) on top of which additional models and bridges can be built, the community to be engaged will double or triple easily.

ITIL is currently detached from PRINCE2 and this is a question almost always asked by delegates who have attended both trainings – how does *this* relate to *that*? Adding additional frameworks (e.g. Agile) to the mix only complicates matters, whereas when studied carefully, there is little or no conflict between these, and a lot of common ground. Both ITIL and PRINCE2 (and other PPM frameworks) would benefit greatly if links between these are clearly presented and bridges to other frameworks explicitly described, with additional practical guidance.

In addition to all this, links with universities should be created (and strengthened, where they already exist). In UK there is to my knowledge at least one university offering an MSc course in IT Service Management[2]. I have discussed this somewhat with them and in length with a few local universities and the interest is definitely there, so I expect this to be a global opportunity.

Examples of value delivered by revised ITIL for individuals and organisations

Delegates
- Clear understanding of the expected outcomes from different types of trainings
- More training options (e-learning, classroom, simulations) to suit different requirements, learning styles and time constraints
- Better guarantee of training quality due to more thorough trainer accreditation
- More hands-on guidance on post-Foundation courses to take back to work the next day

Managers
- Clear understanding of the expected outcomes from different types of trainings
- Better understanding of ROI from the trainings
- More skilled teams, armed with practical guidance in addition to book knowledge
- Better understanding of and more value from ITIL certified employees

Organisations
- Real ROI from the trainings
- Easier evaluation of the skills and value of various training and consulting partners
- Real ROI from other ITIL-related investments through better guidance and practical approach

Practitioners
- Acknowledgement of skills and achievements
- Opportunity to actively engage with the community, ask for and give advice
- Not letting experience and real data go to waste
- Having a trusted source of information

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[2] http://www.northampton.ac.uk/study/courses/courses-by-subject/business-and-management/it-service-management-msc

Some examples of monetisation opportunities for Axelos

- ITIL Foundation materials (fee per person or per organisation)
- ITIL Foundation supporting trainings e.g. simulations (fee per delegate, group or organisation)
- ITIL Practitioner supporting trainings (fee per delegate, group or organisation)
- ATO license models for ITIL Foundation materials and supporting trainings
- ATO license models for ITIL Practitioner supporting trainings
- ITIL Foundation examination fees
- ITIL Practitioner examination fees
- Trainer accreditation (per trainer)
- Printed publications