

Practitioner in IT Service Management

- Release and Control
- Support and Restore
- Agree and Define

Clustered exams Practitioner in IT Service Management

EXIN, the worldwide Examination Institute for Information Science, now offers Practitioner's Certificates in IT Service Management, based on ITIL® which combine a logical set of processes into clusters.

There are currently three clusters in total: Release and Control (IPRC) and Support and Restore (IPSR) have been launched already and are available in English, Dutch, German, Spanish and French, as well as Japanese (from March 2007). The third cluster exam Agree and Define (IPAD) is scheduled for release in the first Quarter of 2007, initially in English only, but from September 2007 also available in Dutch and German.

This Whitepaper is aimed at clarifying the concepts and ideas behind the development of these new Practitioner's Certificates.

Reasons for introducing clustered exams

Practices in IT Service Management have changed. Experience with training indicated there were some gaps to be bridged. There is a broader audience for this more advanced level certificate. And new ways of training require a new, simple and reliable examination format.

Service Lifecycle & Practitioner Domains:

- The single process exams Change Management, Release Management and Configuration Management are combined into one clustered exam Release and Control (IPRC)
- The single process exams Service Desk/Incident Management and Problem Management are combined into one clustered exam Support and Restore (IPSR)
- The single process exams Service Level Management and Financial Management are combined into one clustered exam Agree and Define (IPAD)

EXIN will launch another clustered Practitioner Certificate in IT Service Management: Plan and Improve, in the second Quarter of 2007. This is the logical final step in the introduction of a complete new certification program for ITIL® Practitioner which began in 2005.

Clustered processes: an approved standard

The international ITIL Certification Management Board (ICMB) has officially endorsed the new Practitioner Certificates as part of the international IT Service Management, based on ITIL® certification program. The ICMB approved a joint proposal of EXIN and ISEB for the examination specifications and the accreditation requirements.

These clustered Practitioner examinations will in the future replace the single process-oriented Practitioner examinations, several of which have already been discontinued. The content of the new products has been acknowledged to be a major step forward by representatives of OGC, ISEB, and itSMF.

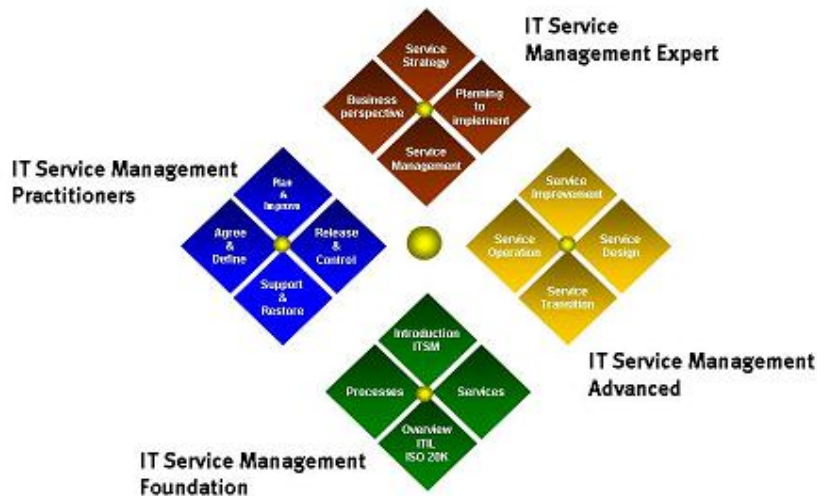
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Target group

All three new Practitioner certificates are aimed at professionals who will participate in managing, organizing, and optimizing the operations of the processes in an IT Service Organization which has implemented the processes based on the ITIL® guidance. The target group consists of operational staff and managers wishing to extend their skills in planning, monitoring, reporting and optimizing, related to the activities in the processes Release and Control, Support and Restore or Agree and Define. Practitioners should have obtained basic knowledge of IT Service Management as shown by their Foundation Certificate in IT Service Management. The target group is more diverse than for the IT Service Manager's Certificate, but more confined than the target group for the Foundation Certificate in IT Service Management.

These certificates are of special interest to IT staff with some experience in one or more of the processes, who want to become involved in managing these processes within their organization. The requirements of the Practitioner certificates include the successful completion of three practical assignments, which prove the ability to apply skills in practice.

An overview of the topics in IT Service Management showing in the blue diamond on the left the four basic Practitioner clusters:



Roles

The Practitioner may be the process manager, but could also be a member of a team responsible for one or several processes or a set of activities in these processes. Delegation of tasks of the process manager often occurs in practice, either due to the complexity of the organization, outsourcing or outtasking, or the existence of special groups of customers or specialized groups of IT staff that need to be involved in IT Service Management activities.

The Practitioner does not necessarily have formal supervising powers over colleagues, but normally will play a directing role in a substantial part of the process. In general it will not be part of the role of the Practitioner to determine the organization's policy, for example the pricing policy for IT Services. Usually it would not fit into the Practitioner's role to implement a process from scratch.

On the other hand, staff involved in the execution of activities in a process without any responsibility in planning, monitoring or optimizing the process would not be regarded as an IT Service Management Practitioner. E.g. staff on the Service Desk, mainly involved in registering calls and routing them to the appropriate specialist groups, according to the existing procedures, would not be regarded as Practitioners. Neither would a System Administrator involved in the installation of new hardware be regarded as a Change Management Practitioner unless he or she would also have some responsibility in managing and organizing the change process.

Examples of roles in the field of the Practitioner in IT Service Management:

- Process Manager for Change and Control, Support and Restore and Agree and Define processes
- Staff of the centralized function Change, Release and Configuration Management, or the Service Desk
- Members of the Incident and Problem Management or Support and Restore team
- Change Controller / Change Coordinator / Release and Configuration Manager
- Incident Controller / Incident Coordinator / Support and Restore
- Configuration Controller / Configuration Management Coordinator /Release and Control
- Service Desk, Customer Service and Technical Support Professionals, Support and Restore Professionals
- Release Controller / Release Management Coordinator
- Service Level Manager
- IT Finance Manager/ Coordinator
- Account Managers, Sales Managers
- Client services representatives
- Staff involved with Marketing and Business Support toward the clients

Note that the names of the roles mentioned will vary from company to company.

IPRC

Key Tasks IPRC

The key tasks for the IT Service Management Practitioner Release and Control are:

1. Managing the Release and Control processes
2. Organizing the Release and Control processes
3. Optimizing the Release and Control processes

The typical activities of a practitioner in management of the Change Management, Release Management and Configuration Management processes would be:

Managing

- Plan the key activities in the Change Management, Release Management and Configuration Management process
- Plan the exchange of appropriate information on managing the Release and Control processes
- Initiate actions to ensure that the key activities in the Release and Control processes meet the objectives set
- Report on the effectiveness and efficiency of the activities in the Release and Control processes

Organizing

- Organize the exchange of appropriate information with other processes
- Provide Change, Release and Configuration Management information to other IT Service Management processes, users and suppliers.
- Maintain the procedures of the Release and Control processes
- Maintain the baselines of configurations and status information of Configuration Items
- Provide instructions for designing, building and configuring releases
- Advise on the back-out and test plans for changes and releases
- Plan the implementation of releases
- Monitor the logistics for releases (purchase, storage, transport, delivery, implementation)
- Coordinate and monitor changes (including preparing CAB meetings)

Optimizing

- Monitor and optimize the Release and Control processes
- Propose improvements, based on results of monitoring and reviews
- Plan and conduct change, release and configuration audits and reviews

IPSR

Key Tasks IPSR

The key tasks for the IT Service Management Practitioner Support and Restore are:

1. Managing the Support and Restore processes
2. Organizing the Support and Restore processes
3. Optimizing the Support and Restore processes

The typical activities of a practitioner in management of the Incident Management, Problem Management processes and the function of the Service Desk would be:

Managing

- Plan the key activities in the Service Desk Function and the Incident Management and Problem Management processes
- Plan the exchange of appropriate information relevant to managing of the Support and Restore processes
- Initiate actions to ensure that the key activities in the Support and Restore processes meet the pre-defined and pre-established objectives
- Plan the monitoring and reporting on the performance and achievements of the activities in the Support and Restore processes

Organizing

- Organize the exchange of appropriate information with other processes
- Provide Service Desk, Incident and Problem Management information to other IT Service Management processes, users and suppliers
- Maintain the procedures of the Support and Restore processes
- Organize the structure of The Service Desk function
- Set up the Service Desk responsibilities, functions, staffing levels and technologies
- Organize the relationships between the Service Desk and Incident Management
- Organize the handling of Incidents
- Organize the relationships between Incident Management and Problem Management
- Organize Problem Control
- Organize Error Control
- Organize Proactive Problem Management

Optimizing

- Monitor and optimize the Support and Restore processes
- Propose improvements, based on results of monitoring and/or reviews

IPAD**Key tasks IPAD**

The key tasks for the IT Service Management Practitioner Agree and Define are:

- Managing the Agree and Define processes
- Organizing the Agree and Define processes
- Optimizing the Agree and Define processes

The typical activities of a practitioner in management of the Service Level Management and the Financial Management for IT Services would be:

Managing

- Plan the key activities for the Service Level Management and Financial Management processes.
- Plan the exchange of appropriate information relevant to managing the Agree and Define processes.
- Initiate actions to ensure that the key activities in the Agree and Define processes meet the objectives set.
- Report on the effectiveness and efficiency of the activities in the Agree and Define processes.

Organizing

- Organize the exchange of appropriate information with other processes.
- Organize the exchange of appropriate information with customers, end-users and suppliers.
- Develop and maintain the procedures of the Agree and Define processes.
- Define IT Services and maintain the Service Catalogue
- Prepare the negotiation, agreement and maintenance of various agreements (SLA, OLA and UC) Participate in the budgeting activity
- Participate in the development of the IT Accounting System
- Participate in the development of the Charging System
- Participate in the creation of the financial reports

Optimizing

- Monitor and optimize the Agree and Define processes.
- Propose service and process improvements, based on results of monitoring and/or reviews.
- Plan and conduct audits of the Agree and Define processes.
- Manage the ongoing financial operations and performance
- Participate in ongoing service management through the service review meetings

Certificate & training

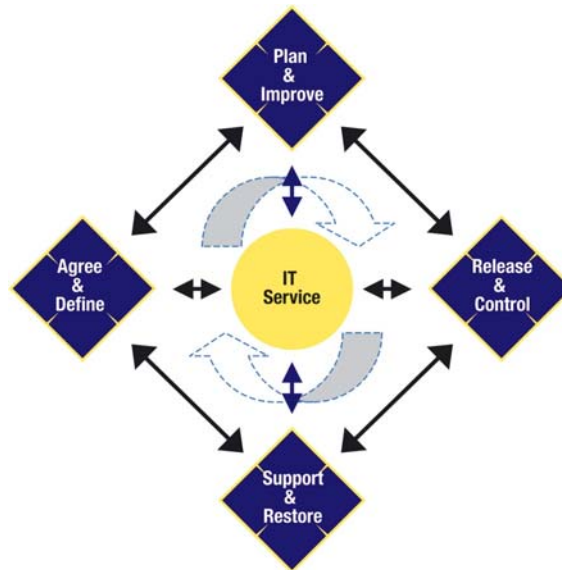
The new combined ITIL Practitioner Certificates will replace the single process Practitioner certificates which will be discontinued during the coming years, per the following dates:

- Incident Management/Service Desk per January 1, 2007
- Problem Management per January 1, 2007
- Financial Management per January 1, 2007
- Service Level Management per January 1, 2008
- Availability Management per January 1, 2007
- Capacity Management per January 1, 2007

EXIN certificates always keep their value. If in the future certain rights can be obtained from the Practitioner certificates Release and Control, Support and Restore or Agree and Define, similar rights will be granted to those that obtained the individual certificates for Change and Configuration Management or to those that have obtained the certificates for Incident Management/Service Desk, Problem Management, Financial Management or Service Level Management.

Details of the training program will largely depend on the training provider. Typically a Practitioner training will take approximately 5 days, which, depending on the training provider, could be one training block or several sessions during a certain period of time. The price of the new Practitioner exams in 2007 is: € 185,- / \$ 210.-.

An overview of planned Practitioner Clusters



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