



Professional Qualifications for

ITIL® PRACTICES FOR SERVICE MANAGEMENT: INTERMEDIATE CAPABILITY STREAM

The ITIL Intermediate Qualification: Service Offerings and Agreements Certificate SYLLABUS



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THE ITIL INTERMEDIATE QUALIFICATION: SERVICE OFFERINGS AND AGREEMENTS CERTIFICATE

The ITIL Intermediate Qualification: Service Offerings and Agreements (SOA) Certificate is a free-standing qualification, but is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert in IT Service Management Certificate. The purpose of this training module and the associated exam and certificate is, respectively, to impart, test, and validate the knowledge on industry practices in Service Management as documented in the ITIL Service Lifecycle core publications.

The ITIL Certificate in Service Offerings and Agreements is intended to enable the holders of the certificate to apply the practices during the Service Management Lifecycle.

Target Group

The target group of the ITIL Certificate in Service Offerings and Agreements is:

- Individuals who have attained the V3 ITIL Foundation certificate in Service Management, or the V3 Foundation Bridge certificate and who wish to advance to higher level ITIL certifications.
- Individuals who require a deep understanding of ITIL Certificate in the Service Offerings and Agreement processes and how it may be used to enhance the quality of IT service support within an organisation.
- IT professionals that are working within an organisation that has adopted and adapted ITIL who need to be informed about and thereafter contribute to an ongoing service improvement programme
- Operational staff involved in Service Portfolio Management; Service Catalogue Management; Service Level Management; Demand Management; Supplier Management; Financial Management and Business Relationship Management who wish to enhance their role-based capabilities.

This may include but is not limited to, IT professionals, business managers and business process owners.

Learning Objectives

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Service Management as a Practice
- Processes across the Service Lifecycle pertaining to the Service Offerings and Agreement curriculum:
 - Service Portfolio Management which provides documentation for services and prospective services in business terms
 - Service Catalogue Management which is concerned with the production and documentation of the Service Catalogue from a business and a technical viewpoint
 - Service Level Management which sets up a Service Level Agreement (SLA) structure and ensures that all SLAs have an underpinning support structure in place
 - Demand Management which identifies Patterns of Business Activity to enable the appropriate strategy to be implemented
 - Supplier Management which ensures all partners and suppliers are managed in the appropriate way and includes contract management
 - Financial Management which includes ensuring understanding of the service value and the management of all financial considerations
 - Business Relationship Managers who have responsibility to represent customers and ensure the Service Catalogue and Portfolio have the right needs
- Operational activities of processes covered in other Lifecycle phases such as Incident and Change Management

- Organizing for Service Operation which describe functions to be performed within Service Offerings and Agreement
- Service Offerings and Agreement roles and responsibilities
- Technology and Implementation Considerations
- Challenges, Critical Success Factors and risks
- CSI as a consequence of effective Service Offerings and Agreement

Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

It is also strongly recommended that candidates:

- Can demonstrate familiarity with IT terminology and understand the context of Service Offerings and Agreements management of their own business environment is strongly recommended.
- Have exposure working in the service management capacity within a service provider environment, with responsibility emphasizing on at least one of the following management processes:
 - Service Portfolio Management
 - Service Catalogue Management
 - Service Level Management
 - Demand Management
 - Supplier Management
 - Financial Management

It is recommended that candidates are familiar with the guidance detailed in the ITIL Service Lifecycle Practices core publications prior to attending training for this certification.

Eligibility for Examination

To be eligible for the examination leading to an accredited ITIL Certificate in Service Offerings and Agreements, the candidate must fill the following requirements:

- At least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organisation (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- There is no minimum mandatory requirement but 2 to 4 years professional experience working in IT Service Management is highly desirable
- Hold the ITIL V3 Foundation Certificate in IT Service Management or ITIL V2 Foundation plus the bridging certificate
- It is also recommended that students should complete at a minimum 12 hours of personal study by reviewing the syllabus and the pertinent areas of the ITIL Service Management Practice core guidance publications and in particular, the Service Strategy and Service Design publications

Level of Difficulty

All ITIL Service Management certifications use the Bloom's taxonomy in both the construction of the learning units and in the examination which is based on this syllabus.

A learning taxonomy is a scale of the degree of difficulty in the learning process. These levels apply to the cognitive, affective and psychomotor domains of learning but in the ITIL Qualification Scheme, we deal only with the cognitive sphere.

Bloom defines six levels of learning in the COGNITIVE domain which are both sequential and cumulative. They move from the simple to the complex. This implies that in order to achieve the sixth level of learning, for example, the instructor must ensure that the previous five levels have been mastered.

The KNOWING level: Here the student is able to bring to mind or remember the appropriate material. The behavioural tasks associated with this level tax the student's memory and include such tasks as defining, recalling, listing, recognizing, describing and naming.

The COMPREHENDING stage: Here the student is able to understand or grasp the meaning of what is being communicated and make use of the idea without relating it to other ideas or materials and without seeing the fullest possible meaning or translation of the idea. Behavioural tasks at this level would include stating in the students own words, giving examples of, illustrating, inferring, summarizing and interpreting. These actions involve the knowing which has taken place at the first level.

The APPLYING level: Here the student should be able to use ideas, principles and theories in new, particular and concrete situations. Behavioural tasks at this level involve both knowing and comprehension and might include choosing appropriate procedures, applying principles, using an approach or identifying the selection of options.

The ANALYZING level: This is the fourth level of learning described by Bloom. At this level the student is able to break down a communication (rendered in any form) into constituent parts in order to make the organization and significance of the whole clear. Breaking down, discriminating, diagramming, detecting, differentiating and illustrating are important behavioural tasks at this level and can be seen to include the previous levels of knowing, comprehending and applying. Here the significance of the constituent parts of an entity are examined in order to understand the whole more fully.

The SYNTHESIS level: At this level the student is able to put back together again the various parts or elements of a concept into a unified organization or whole. This putting together again and making sense of small parts is a crucial factor in intelligence and learning. Behavioural tasks at this level would include creating, writing, designing, combining, composing, organizing, revising and planning. This level of learning in order to occur must include the first four levels – knowing, comprehending, analyzing and applying. This level of learning is probably the most intense and exciting for student and teacher alike.

The EVALUATING phase: In this phase the student is able to arrive at an overview and to judge the value and relative merit of ideas or procedures by using appropriate criteria. At this level of learning the student will be able to compare, judge, appraise, justify, criticize and contrast theories, procedures, methods and concepts. This level involves mastery of the five previous levels of knowing, comprehending, applying analyzing and synthesizing.

For the purposes of the ITIL Qualifications Scheme, the Blooms level will appear in each syllabus module to identify the highest level of cognitive difficulty that course content should deliver to meet the learning outcome and competence to meet the examination level of difficulty.

The following table illustrates the use of the taxonomy in ITIL professional qualifications.

Bloom Levels and taxonomy	Used by ITIL certification	Intellectual activity in learning outcome and exam proficiency
Knowing Comprehending	ITIL Service Management Foundation Level stream (includes V2 – V3 Foundation Bridge certification)	The ability to recall, recite, name, and understand the meaning of ITIL terminology and basic practice fundamentals. <i>Vernacular examples used in Syllabus:</i> Understand; Describe; Identify
Applying Analyzing	ITIL Service Management Lifecycle Stream Capability Stream Managing Across the Lifecycle	The ability to use the practices and concepts in a situation or unprompted use of an abstraction. Can apply what is learned in the classroom, in workplace situations. Can separate concepts into component parts to understand structure and can distinguish between facts and inferences. <i>Vernacular examples used in Syllabus:</i> Analyze; Demonstrate; Apply; Distinguish; Justify; Produce; Decide
Synthesis Evaluate	ITIL Service Management Managing Across the Lifecycle – level 5 only ITIL Service Management Professional – Advanced Series	The ability to create patterns or structure from composite elements to achieve a new meaning or outcome. Can make judgement, weigh options of ideas and elements to justify and support an argument or case. <i>Vernacular examples used in Syllabus:</i> Evaluate; Justify; Summarize; Plan; Modify; Manage; Control

Intermediate stream qualifications will examine according to the Bloom level assigned to each syllabus learning unit within each of the Service Lifecycle and Service Capability streams. This means that a student must be prepared to be tested up to and including that level for any question related to that learning unit or units.

The examination format of complex multiple choice will offer a scenario and questions with a corresponding series of possible answers. Each is constructed to test a student's competency up to and including the bloom level associated to the syllabus learning unit that the question is mapped to. Instructors should ensure that the module curriculum offers discussion, practical exercises and instruction that will satisfy the competency needed to meet the exam level of difficulty.

The intermediate modules are expected to provide a practical level of proficiency for a student to be able to utilize the knowledge learned in their work environment. The examinations test a level of proficiency that allows students to apply the knowledge learned in the course to correctly select the correct sequence of possible answers.

Service Offerings and Agreements Syllabus

The ITIL Intermediate Qualification: Service Offerings and Agreements is awarded to those who complete the following ten units of study and successfully pass the relevant examination. The units cover the topics listed (section numbers from the source publications are included along with indicative contact study hours).

<p>ITIL SC: SOA01 Level of Difficulty – up to Bloom level 2</p>	<p>Introduction</p> <p>This unit introduces the candidate to the concepts and terminology of the Service Lifecycle and the role of SOA within the Lifecycle.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand and describe:</p> <ul style="list-style-type: none"> • the concept of Service Management as a practice (SS 2.1, ST 2.1) • the concept of Service, its value proposition and composition (SS 2.2, ST 2.2) • the functions and process across the Lifecycle (SS 2.6, ST 2.3) • the role of Processes in the Service Lifecycle (SS 2.6.2, SS 2.6.3) • how Service Management creates business value (SS 3.1, SD 2.4.3, ST 2.4.3, SO 2.4.3, CSI 3.7.2) • how the processes within the Service Offerings and Agreement curriculum supports the Service Lifecycle (SD 2.4.5, SS 5.1 up to 5.1.2, SS 5.5.1, SS 5.3 up to 5.3.1) <p><i>The recommended minimum study period for this unit is 1.5 hours.</i></p>
<p>ITIL SC: SOA02 Level of difficulty – up to Bloom level 4</p>	<p>Service Portfolio Management</p> <p>This unit covers the Service Portfolio Management process and how it contributes to Service Offerings and Agreements.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the Service Portfolio and illustrate its relationship with the Service Catalogue and Service Pipeline (SS 4.2.3; SS 5.1.2.3) • how a Service Portfolio describes a provider's service and how it relates the business service with the IT service. (SS 5.3) • the Service Portfolio Management methods (SS 5.4) <p><i>The recommended minimum study period for this unit is 2.5 hours.</i></p>

<p>ITIL SC: SOA03 Level of difficulty – up to Bloom level 4</p>	<p>Service Catalogue Management</p> <p>This unit covers the Service Catalogue Management process and how it is integrated with the Service Portfolio.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the purpose, goal and objectives of the process (SD 4.1.1) • the scope of the process (SD 4.1.2) • the interface to the Service Portfolio (SS 4.2.3; SD 3.6.2; SD 3.9; SD 3.10) • the difference between a Business and a Technical Service Catalogue (SD 4.1.4) • the importance of the Service Catalogue to the Service Lifecycle and the business (SS 4.2.3; SD 3.10; SD 4.1.3) • its policies, principles and basic concepts (SD 4.1.4) • the use of key metrics, challenges, critical success factors and risks associated with the process (SD 4.1.8; SD 4.1.9) • the process including the utilisation of the Service Catalogue by other processes and functions (SD 4.1.5; SD 4.1.6) • produce a Service Catalogue (SD Appendix G) <p><i>The recommended minimum study period for this unit is 3.0 hours.</i></p>
<p>ITIL SC: SOA04 Level of difficulty – up to Bloom level 4</p>	<p>Service Level Management</p> <p>This unit covers the Service Level Management process and deliverables.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the purpose, goal and objectives of the SLM (SD 4.2.1) • the scope of the SLM (SD 4.2.2) • the importance of the process to the Service Lifecycle and how its generate business value (SD 4.2 up to 4.2.1, SD 4.2.3) • the principles and basic concepts (4.2.4) • the main activities, methods and techniques of this process and how it relates to the Service Lifecycle. This includes the SLA structures and determining Service Level Requirements (SD 4.2.5 up to 4.2.5.3 including figures 4.5, 4.6 and 4.7) • the deliverables from the process (SD 4.2.5.6, 4.2.5.7) • monitoring of service performance against SLAs (4.2.5.3, CSI 3.5) • the use of key metrics, challenges, critical success factors and risks associated with the process (SD 4.2.7, SD 4.2.8, SD 4.2.9) • the contents of SLAs, OLAs and review meetings (SD 4.2.5.5, 4.2.5.8, SD Appendix F) • the interfaces to other processes and functions (SD4.2.5 up to 4.2.5.1, Figure 4.5, SD 4.2.5.4,, SD 4.2.5.8, SD 4.2.5.9, SD 4.2.6) <p><i>The recommended minimum study period for this unit is 8.0 hours.</i></p>

<p>ITIL SC: SOA05 Level of difficulty – up to Bloom level 4</p>	<p>Demand Management</p> <p>This unit covers the Demand Management process and how it contributes to Service Offerings and Agreements.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the basic concepts of the process (SS 5.5.1) • activity based Demand Management and business activity patterns (SS 5.5.2, SS 5.5.3, SS figure 5.23) • the interfaces to Service Portfolio (SS 5.5.2) • Managing demand for Service (SS 5.5.3, table 5.8, table 5.9) <p><i>The recommended minimum study period for this unit is 2.5 hours.</i></p>
<p>ITIL SC: SOA06 Level of difficulty – up to Bloom level 4</p>	<p>Supplier Management</p> <p>This unit covers the use of the Supplier Management process and the interfaces and dependencies of the process.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the purpose, goal and objectives of the process (SD 4.7.1) • the scope of the process (SD 4.7.2) • the importance of the process to the Service Lifecycle and how they generate business value (SD 4.7.3) • the principles and basic concepts (SD 4.7.4) • the main activities, methods and techniques of this process and how it relates to the Service Lifecycle including evaluation of new suppliers (SD 4.7.5 up to SD 4.7.5.2, SD 4.7.5.3, SD 4.7.5.4, SD 4.7.5.5) • the use of Supplier Categorization and maintenance of the Supplier Database (SD 4.7.5.2) • the use of key metrics, challenges, critical success factors and risks associated with the process (SD 4.7.7, SD 4.7.9) • the inputs and outputs of the process (4.7.6) <p><i>The recommended minimum study period for this unit is 3.0 hours.</i></p>

<p>ITIL SC: SOA07 Level of difficulty – up to Bloom level 4</p>	<p>Financial Management</p> <p>This unit covers how Financial Management contributes to the Service Lifecycle Operation and the basic principles of Service Economics.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the purpose, goal and objectives of the process (SS 5.1 up to 5.1.2) • the scope of the process (SS 5.1.2 up to SS 5.1.2.1) • the concepts of Service Valuation (SS 5.1.2.1, SS 5.1.3.1, SS figure 5.3) • the importance of the process to the Service Lifecycle and how they generate business value (SS 5.1 opening section, SS 5.1.1) • the various aspects of the process and the basic concepts – funding, accounting and chargeback (SS 5.1.2.5, SS 5.1.2.6, SS 5.1.2.7, SS 5.1.4.2) • Return on Investment and the business case (SS 5.2 up to 5.2.2.1, 5.2.3 up to SS 5.2.3.1) • the main activities, methods and techniques that enable this processes and how it relates to the Service Lifecycle (SS 5.1.3) • Design and Implement a Financial Management process (SS 5.1.4.3) <p><i>The recommended minimum study period for this unit is 5.5 hours.</i></p>
<p>ITIL SC: SOA08 Level of difficulty – up to Bloom level 4</p>	<p>Business Relationship Manager</p> <p>This unit covers the role of Business Relationship Manager.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <p>the role of Business Relationship Managers (SS 4.1.3; SS 5.5.4.5)</p> <p><i>The recommended minimum study period for this unit is 1.0 hours.</i></p>
<p>ITIL SC: SOA09 Level of difficulty – up to Bloom level 4</p>	<p>Service Offerings and Agreement Roles and Responsibilities</p> <p>This unit covers how Service roles and responsibilities contribute to Service Offerings and Agreement.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • key roles and responsibilities of the Service Catalogue Manager (SD 6.4.5) • key roles and responsibilities of the Service Level Manager (SD 6.4.6) • key roles and responsibilities pertaining to the Supplier Manager (SD 6.4.11) <p><i>The recommended minimum study period for this unit is 1.0 hours.</i></p>

<p>ITIL SC: SOA10 Level of difficulty – up to Bloom level 4</p>	<p>Technology and Implementation Considerations</p> <p>This unit covers technology implementation as part of implementing service management process capabilities, and what special technology functions and features are related to Service Offerings and Agreement practices.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • the generic requirements for technology to assist Service Design (SD 7.1) • the evaluation criteria for technology and tooling for process implementation (SD 7.2) • the good practices for practice and process implementation (SD 8.2, 8.3, 8.4) • the challenges, Critical Success Factors and risks related to implementing practices and processes (ST 9.1-9.3, SO 9.1-9.3, SD 9.1-9.2) • how to plan and implement Service Management technologies (SO 8.5) <p><i>The recommended minimum study period for this unit is 2.0 hours.</i></p>
<p>ITIL SC: SOA11</p>	<p>Summary, Exam Preparation and Directed Studies</p> <p>This unit summarises the material covered in the previous units and prepares candidates for the examination. It is likely that most course providers will wish to offer, and review, at least one mock examination opportunity.</p> <p><i>The recommended minimum study period for this unit is 2.0 hours.</i></p>

Note:**Lecture and exercises**

Meeting the learning objectives of this syllabus can be assisted through the use of practical exercises during the delivery of an accredited course. It is recommended that course providers make use of exercises to enhance the reinforcement of the learning objectives in this syllabus. To aid course providers, there are areas within each learning unit whose learning objective include such phrases as “illustrate, discuss, use examples”, etc, which may be considered as opportunities to introduce practical course exercises. These are not mandated areas for practical exercises, but provided as suggestions for use by course providers.

Learning outcomes

Following completion of this unit, the candidate will possess knowledge of:

- Understanding of the importance of Service Management as a Practice concept and Service Operation Principles, Purpose and Objective
- The importance of ITIL Service Offerings and Agreements while providing service
- How all processes in ITIL Service Offerings and Agreement interact with other Service Lifecycle Processes
- The processes, activities, methods and functions used in each of the ITIL Service Offerings and Agreement processes
- How to use the ITIL Service Offerings and Agreement processes, activities and functions to achieve operational excellence
- Explain how to measure ITIL Service Offerings and Agreements
- The importance of IT Security and its contributions to ITIL Service Offerings and Agreements
- Understanding of technology and implementation considerations surrounding ITIL Service Offerings and Agreements
- Challenges, Critical Success Factors and Risks associated to ITIL Service Offerings and Agreements

Format of the Examination

Type	Eight (8) multiple choice, scenario-based, gradient scored questions. Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.
Duration	Maximum 90 minutes for all candidates in their respective language (Candidates sitting the examination in a language other than their first language have a maximum of 120 minutes and are allowed to use a dictionary)
Prerequisite	ITIL V3 Foundation Certificate or ITIL V2 Foundation plus Bridge Certificate and completion of an accredited Course from an ITIL Accredited Training Provider
Supervised	Yes
Open Book	No
Pass Score	28/40 or 70%
Distinction Score	TBC
Delivery	Online or Paper Based Examination

Criteria of Training Competence

This syllabus can only be delivered to target groups by an accredited provider / trainer. Any provider/trainer must hold the following qualifications to be eligible to provide this syllabus:

Criteria	Eligibility	Degree of proficiency validation
Accredited Training Organization	Required	The company shall be registered and in good standing with the Official Accreditor
ITIL Service Offerings and Agreements Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute
ITIL V3 Expert Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute

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