



# **Manatee County Information Technology Services**

*Business Value through Partnership...the Service Provider of Choice*  
**Organizational Performance Standards**

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October 2021

# Table of Contents

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Introduction .....	3
Purpose .....	3
Employee Empowerment .....	4
Our Vision & Mission .....	5
The Guiding Principles.....	6
Major Business Strategies.....	6
Leadership.....	7
Standards of Engagement & Interaction .....	11
Standard of Reciprocity.....	12
The Professional.....	12
Employee Performance Evaluation & Pay for Performance .....	14
Email Etiquette & Policy.....	15
Service Alignment .....	16
Business Relationship Management.....	16
Technical Advisory Group (TAG) .....	21
Project Management .....	22
Customer Service Management .....	24
<i>Service Request</i> .....	25
<i>Closing Service Requests</i> .....	26
<i>Incident</i> .....	27
<i>Closing Incidents</i> .....	27
<i>Work Effort</i> .....	28
<i>Closing a Work Effort</i> .....	28
ITIL Expectations: In Practice .....	29
Availability Management .....	29
Change Management.....	29
Incident Management.....	30
<i>Internal Organizational Level Agreement: Major Incident- Priority Code 1 &amp; 2</i> .....	30
<i>CSC Managed/Coordinated Incidents: Cherwell Priority Codes 3,4, &amp;5</i> .....	33
Problem Management .....	34
Strategic Service Owner(ship).....	34
Operational Metrics & Key Performance Indicators Reference Guide.....	36
Glossary.....	40



# Introduction

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Information Technology Services (ITS) supports the business of Manatee County Government and provides our customers with business solution options and opportunities for gaining efficiencies. Under the direction of the County Administrator, and the Deputy County Administrator(s), ITS continues to collaborate and partner with BCC Departments, Constitutional Offices, and the Courts to enable business strategies that enhance *their* vision and mission. Internal centers of competency continue to mature to allow for maintaining and protecting our infrastructure from cyber security threats, ensuring business continuity, and targeting a discipline of continual service improvement. The adoption of strategic planning, project management, business relationship management, business transition management, application management, change control, and service management best practices, add real business value to county operations in the form of consistent cost-effective service delivery and support.

The Information Technology Services Department is a team of people with complementary strengths who are committed to a common purpose, who aspire to consistently drive toward a higher standard of performance, and who hold each other accountable for the success of the organization. To succeed as an organization, we must also succeed as individuals...*as we are only as strong as our weakest link*. With that credence, the *Organizational Performance Standards Document* should be used as the guide for “walking the walk” in a collective organization of high skills, with high accountability and professionalism, coupled with a passion to provide quality services that matter to our customers.

## Purpose

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The Information Technology Services Department is an outward facing service associate partner, that is, ITS is relied upon for securely supporting the technology backbone, hardware, and relative applications for departments under the purview of the Manatee County Board of County Commissioners; additional support services are provided to the Constitutional Offices.



ITS is the hub of all things with a technical undercoat and we must drive to provide quality services for and to our customers. The efficiency and effectiveness of our services directly impact our customers, and then to, our mutual customers: the citizens of Manatee County.

Manatee County Government’s core values steer ITS’ approach to service provision. Manatee County Government is committed to assuring we are accountable, civil, and ethical in our behavior and interaction with each other as co-workers and to our customers.

We are guided to practice our core values and serve our customers and community thru the following:



*"As an organization, we feel it is important to articulate our core values. These values can easily be summed up in one word: ACE stands for Accountability, Civility and Ethics and provides a simple mantra for each of us. If we are consistently committed to ensuring we are accountable for our actions (not making excuses, timely and responsive), to treating people in a civil manner (showing respect, patience and empathy) and to practicing ethical behavior (completely honest in all our transactions - including fiscal stewardship and 100% effort), we will be a model organization and highly successful in serving our citizens and making Manatee County a premier place to live. Practice ACE - it's the way to go." (ACE-Accountability, Civility, and Ethics)*

**The ITS Organizational Performance Standards Document is used as a reference guide with the intent to provide directional insight toward our organizational cultural compass and to provide measurable parameters related to continuous service improvement. The measurable parameters, or key performance indicators (KPIs), are used to track and improve our services and to identify systemic vulnerabilities that do not support quality customer service. It is anticipated that KPIs will be reviewed annually to determine if continued monitoring is warranted, and as performance outcomes necessitate, percentage expectations may be adjusted. Additionally, at a minimum of an annual pace, the Organizational Performance Standards Document should be reviewed by the ITS Leadership Team to assure the document is a tool for influence and remains relevant.**

## Employee Empowerment

***When facing a decision, ask yourself the following questions:***

Is it the right thing for the community?

Is it the right thing for County government?

Is it ethical and legal?

Is it something for which you are willing to be accountable?

Is it consistent with the County's/Department's values and policies?

If the answer is YES to all of these questions, don't ask for permission . . .  
**JUST DO IT!**

Manatee County Government is committed to providing quality service with an emphasis on Accountability, Civility and Ethics.

Manatee County Government's mission is to provide efficient, effective, responsive government that is always mindful of our sensitive natural environment while achieving the Commission's vision for the County: a premier place in which to live, work and play. (ACE-Accountability, Civility, and Ethics)



# Our Vision & Mission

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The Information Technology Services (ITS) Department exists to enable the business of Manatee County Government, and to provide solutions to real business problems and identify opportunities in pursuit of customer satisfaction as the *Service Provider of Choice*.

## ***Business Value through Partnership***

***...the Service Provider of Choice***



We exist to enable the business with speed and scale, and to provide solutions to real business problems and opportunities in pursuit of customer satisfaction and desired outcomes. We specialize in leadership, and provide experienced professionals, innovation and core enterprise technologies that meet the critical business drivers of our customers.

Our employees matter and we value their contribution as our core competency. We are committed to recruit, develop, reward, and retain personnel of exceptional ability, character, and dedication.



# The Guiding Principles

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**We** Run Our Business Upon the Principles Of ACE ... Accountability, Civility, and Ethics

**We** Are Committed to the Success Of Each Other ... and that of Our Customers

**We** Collaborate ... Being Common When We Can, and Different Only When We Have to Be

**We** Challenge the Status Quo, Embrace Change, and Create a Culture of Continuous Improvement

**We** Leverage Industry Best Practices And Go *With* The Grain ... Customizing As A Last Resort

**We** Are Good Financial Stewards ... Where Business Value Matters ... And So Does The Cost

**We** Reuse What We Can First, Then Buy

What We Need if We Don't Have it, and Build If We Can't Find It

**We** Seek Opportunities to Reduce Complexity ... Combining What *Should* Be Combined; Separating What *Should* Be Separated; and Eliminating What *Can* Be Eliminated

**We** Are Committed To Reduce Consumables and Energy Consumption ... Go Green!

**We** Are Driven to Quality ... Doing the "Right Things" ... the "Right Way" ... the "First Time"

**We** Are Adaptable and Flexible ... Designing and Building for the Inevitable Change that Will Come

**We** Won't Let Perfection Get in the Way of Better

## Major Business Strategies

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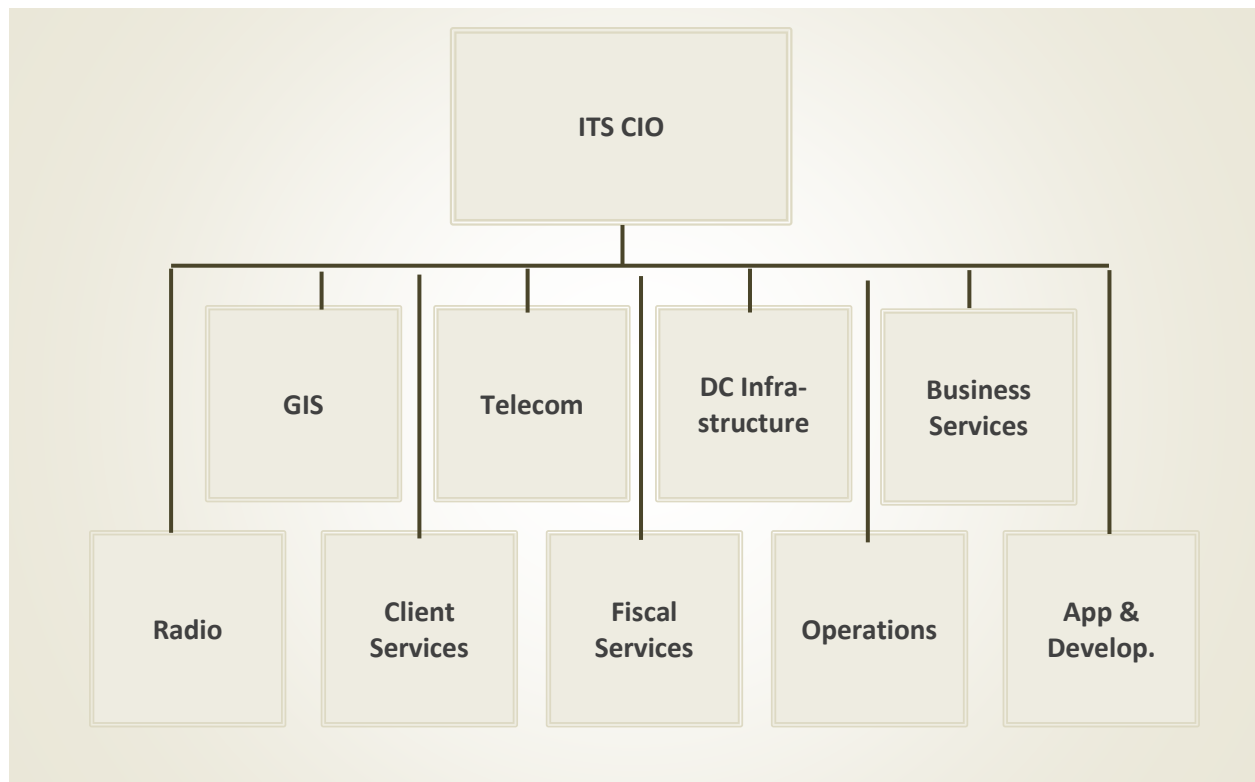
The Customer is **1<sup>st</sup>**, **2<sup>nd</sup>**, and **3<sup>rd</sup>** and in that Order  
Champion Education to Leverage Investment  
Transparency with the Big Picture  
Project Definition before Project Execution  
Tough Negotiation with Predictable Cost Controls  
Total Cost of Ownership before Approval  
Technology Refresh with Business Continuity





# Leadership

*The best thing a leader can do for a great group is to allow members to discover their own greatness (Peters, 1999)*



ITS is comprised of 74 positions. Our day to day operations and our work to assist internal customers in preparing for citizen demand are supported through the dedicated staff of ITS. There are nine leadership level positions reporting to the ITS CIO. And while described as the *Leadership Team*, the leaders are not exclusive to the organizational structure level above, as a *leader* is not defined by a title.

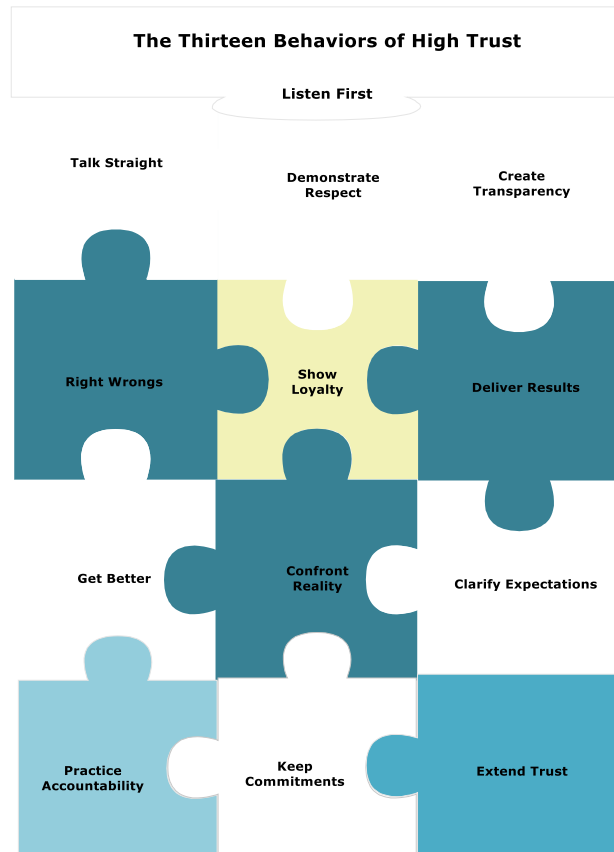
Leaders are created by maintaining a positive and genuine investment in the well-being of the team and consistently having the ability to influence the attitude and behavior of others.

As a team, we have an opportunity to influence each other to become better, more compassionate/passionate leaders and thus, mentor that behavior and those relationships with peers. If we are successful, we create an organization abundant with decisive, self-starting, motivated and passionate staff; a winning combination for the customers we serve.

Encouragement breeds confidence, and confidence is the root of all pro-active customer centered leadership.

(Banther, 2014)





L-1 Key Performance Indicator: To encourage leadership and trust throughout the organization, as titled leaders we will commit and role model The Thirteen Behaviors of High Trust (Covey, 2008). **Method of confirming achievability:** Self-enforcing, measured by initiated feedback from peers and internal and external customers.

### The Role of the Leadership Team

**REPRESENT THE BUSINESS OF INFORMATION TECHNOLOGY SERVICES:** Apply sound business management practices and data-driven decision making. Align our Strategic Business Plan with our Customers' priorities. Enable value-added solutions to real business problems and leverage opportunities. Differentiate our portfolio of services in terms of business value and financial benchmarks.

**FOCUS ON HIGH-QUALITY SERVICES:** Deliver on time and on budget and achieve customer satisfaction the first time. Leverage industry best practices and process disciplines to achieve service level commitments. Encourage the identification of ideas, issues and actions necessary for continuous improvement. Establish performance standards and Key Performance Indicators to measure desired outcomes.

**STRENGTHEN PARTNERSHIPS:** Demonstrate our commitment to the success of our customers and to each other. Work *with* our customers to ensure understanding and build mutual trust and respect. Leverage governance for oversight and direction with clear roles and responsibilities. Thank customers often and be responsive to their business needs!

**INVEST IN TALENT MANAGEMENT:** Recruit, develop, reward, and retain employees of exceptional ability, character, and dedication. Implement an organizational development program for employee and departmental growth.

**MARKET THE BUSINESS OF INFORMATION TECHNOLOGY SERVICES:** Champion the departmental vision and mission. Champion and participate in marketing opportunities for gaining visibility on the products and services offered to our customers. Promote economic stimulus with strategic initiatives that enhance the mission of Government and the Manatee County *Brand*.

**BE AN AMBASSADOR** for the departmental and enterprise vision, mission, and Strategic Business Plan. Function as a catalyst for internal and external change while building consensus around common





direction. Take ownership of the Strategic Business Plan and ensure visible staff alignment and prioritization of all strategic projects and initiatives, and daily work activities. Objectivity, flexibility, and adaptability must be the foundation of all decision making in pursuit of the most cost effective and efficient business solutions that meet our customers' business requirements, and that add tangible value to their respective businesses.

**MAINTAIN DISCIPLINED PROCESS MANAGEMENT:** Use the IT Infrastructure Library (ITIL) process framework to establish and develop a culture of disciplined process management. Comply and enforce the process disciplines and challenge the status quo as part of a continuous improvement process in support of optimal business services delivery and support.

**ACT AS A CATALYST** for departmental growth in the area of customer service to measure and achieve customer satisfaction. *Be the service provider of choice.* Ask: "In the presence of competition, would my customer choose me based on my performance and the service I've just provided to them?" If not, there is room for improvement. Be visible to your customers and to your teammates (who are also your customers). Listen, consider all perspectives, and ensure understanding of your customers' business requirements and expectations, and in an environment that encourages cooperation and resolves conflicts.

**CHAMPION PROJECT MANAGEMENT** and the cultural growth of disciplined project portfolio and asset management. Under the Project Management Body of Knowledge (PMBOK) process discipline, and quality assurance best practices; prioritize, justify, plan, execute, monitor, and evaluate the scope, schedule and cost of projects and strategic initiatives.

**UTILIZE THE PERFORMANCE EVALUATION PROCESS** for the growth and development of departmental performance. Hold yourself and staff accountable for meeting desired outcomes. Define clear and measurable goals and objectives, and provide on-going feedback that is interactive. Recognize and reward good performance; counsel and discipline poor performance. Develop, enforce, and analyze performance standards and metrics as a measure of accountability and to identify incremental improvements. Be a mentor in staffs' professional development and assist with defining appropriate objectives to achieve professional goals.

### Core Competencies of ITS' Leaders

**TEAM BUILDING:** Encourage open communication and facilitate cooperation within the organization and with customer groups; foster commitment, team spirit, pride, and trust. Develop leadership in others through coaching, mentoring, rewarding and guiding. Empower others through appropriate sharing of power and authority.

**LEVERAGE DIVERSITY:** Recruit, develop, reward, and retain a diverse high quality workforce in an equitable manner in accordance with applicable law. Lead and manage an inclusive workplace that maximizes the talents of each person to achieve sound business results. Respect, listen, understand, value and seek out individual differences to achieve the vision and mission of the organization. Develop and use measures and rewards to hold self and others accountable for achieving results that embody the principles of diversity.

**SERVICE MOTIVATION:** Create and sustain an organizational culture that fosters the quality of service essential to high performance. Enable others to acquire the tools and support they need to perform well. Show a commitment to public service. Influence others toward a spirit of service and meaningful contribution to both internal and external customers.

**VISION:** Take a long-term view and act as a catalyst for organizational change; build a shared vision with others. Motivate and influence others to translate vision into action. Recognize the organization's potential for driving performance to higher levels of effectiveness and productivity.

**INFLUENCE/ NEGOTIATE:** Persuade others; build consensus through give and take; gain cooperation from others to obtain information and accomplish goals; facilitate "win-win" situations.



**INTERPERSONAL SKILLS:** Consider and respond appropriately to the needs, feelings, and capabilities of people in different situations with tact, compassion and sensitivity, and treat others with respect.



**COMMUNICATION:** Make clear and convincing oral presentations to individuals or groups at various levels; listen effectively and clarify information as needed to achieve mutual understanding; facilitate an open exchange of ideas and foster an atmosphere of open communication. Express facts and ideas in writing in a clear, convincing, organized, and professional manner.

**ACCOUNTABILITY:** Assure that effective and efficient controls are developed and maintained to ensure the integrity of the organization including working within legal authority, structure, and frameworks.

Hold self and others accountable for rules and responsibilities. Ensure that projects are within areas of specific responsibility and are completed in a timely manner and within budget. Take corrective actions that focus on results and measure attainment of outcomes.

**PROBLEM SOLVING:** Identify and analyze problems; distinguish between relevant and irrelevant information to make logical decisions; offer solutions to individual and organizational problems.

**TECHNICAL CREDIBILITY:** Understand and appropriately apply procedures, policies, requirements, and regulations related to specialized expertise. Make sound hiring and capital resource decisions and address training and development needs. Understand the linkage between administrative competencies, mission needs, and legal constraints.

**CORPORATE & SOCIAL RESPONSIBILITY:** Champion a culture of collaboration and partnership with other County Government entities to support cross functional initiatives and activities. The objective should be to gain recognition for ITS as a committed leader and contributor to the greater County community. Good examples of these activities include support for the County's training collaborative, speaking engagements, support for the County Volunteer programs and support for community and educational technology events.

### ***Suggested Reading:***

Banther, Barry. (2014). *A leader's gift: how to earn the right to be followed*. Austin: Greenleaf Book Group Press.

Covey, Stephen. (1990). *The seven habits of highly effective people*. New York: Simon Schuster.

Dungy, Tony and Jim Caldwell. (2010). *The mentor leader: Secrets to building people and teams that win consistently*. Winter Park: Tyndale House.

Gladwell, Malcom. (2002). *The tipping point: how little things make a difference*. New York: Back Bay Books.

Harvard Business Review. (2011). *HBR's ten must reads on strategy*. Boston: Harvard business School Publishing.

Heath, Chip. (2008). *Made to stick: Why some ideas take hold and others come unstuck*. Iowa: Arrow Books.

Kouzes, James and Barry Posner. (2003). *Encouraging the heart: A leader's guide to rewarding and recognizing others*. San Francisco: Jossey-Bass.



# Standards of Engagement & Interaction

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As a Leadership Team and throughout our organization, we are bound by the following:

- The first response is not “we don’t do that” or “we can’t do that.” (If there is apprehension, then ask: “tell me more.”) Listen, and discuss options.
- “How can I help?” The response to an interaction that is deemed situational stress.
- We are one department with multiple functional teams; encourage cross over work when it makes sense and promotes professional growth.
- Promote feedback.....each voice is as important as another.
- Flexibility encourages positive morale and is a symptom of support for positive change; consider that not everything is black and white, or rule bound.
- Be a catalyst for forward thinking and creativity....think outside of the box.

At a quarterly county Leadership Team Meeting, a *very wise* Director told a version of the story below. To provide context, it was to encourage those gathered, as titled leaders, to support each other and staff in launching forward with an innovative regard to providing services to each other and to the citizens of Manatee County. Given the work planned for our department and the self-inflicted goals we had placed on ourselves to promote organizational growth, the timing of the story was serendipitous and continues to maintain relevance today:

*...As a man was passing the elephants, he suddenly stopped, confused by the fact that these huge creatures were being held by only a small rope tied to their front leg. No chains, no cages. It was obvious that the elephants could at any time, break away from their bonds but for some reason, they did not. He saw a trainer nearby and asked why these animals just stood there and made no attempt to get away. “Well,” trainer said, “when they are very young and much smaller we use the same size rope to tie them and, at that age, it’s enough to hold them. As they grow up, they are conditioned to believe they cannot break away. They believe the rope can still hold them, so they never try to break free.” The man was amazed. These animals could at any time break free from their bonds but because they believed they couldn’t, they were stuck right where they were.*

*Like the elephants, how many of us go through life hanging onto a belief that we cannot do something, simply because we failed at it once before (or because we have simply done it the same way for so long)? Failure is part of learning; we should never give up.... (Academic Tips, 2011)*

***Be an untethered Elephant!***



# Standard of Reciprocity

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## Internal Customers

While our external customers will always be a primary focus, often what can be overlooked are our internal customers; the co-workers we interface with daily. Our organization strives to be the *Service Provider of Choice*...that goal is achievable when we work as partners within our own

The customer is our audience and the benefactor of our internal support for each other and our overall organizational success. When we focus on each other's success, we all win!

organizational boundaries. While ITS is aligned functionally by the type of service provided, the "separation" is merely on paper via the traditional organizational chart. An individual's effort is focused on OUR organizational enterprise. With that, an individual will assist and align with staff across the department to keep an eye toward the goal of providing premier customer service (internally and externally) in a collaborative effort of goodwill.

**SR-1 Key Performance Indicator:** Individuals may volunteer or be assigned tasks/projects outside of their traditional functional team as necessary and when it promotes better service to the customer and/or encourages professional growth. **Method of measurement: documented for inclusion and recognition on the employee's annual performance evaluation.**

## The Professional

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Our employees matter and we value their contribution as our core competency. We are committed to recruit, develop, reward, and retain personnel of exceptional ability, character, and dedication.

## Professional Development

*Own* your development plan. Stay current and add to your technical skill set, enhance your business service acuity, leadership techniques, communication skills, and collaboration strategies. Look for opportunities to remain up to date with ITS core technologies and terminology through self-study and available training opportunities. Attend internal trainings when they are offered and keep current with your craft. And remember, your technical prowess can be exponentially more effective by including a balance of equal effort toward sharpening your soft skills too!

## Dress for Success-Consider Your Audience and Environment

The way we dress sends an immediate first impression to those we meet and has the potential to reflect on the overall professionalism of the department. With that, it is important to drive toward providing a positive impression. ITS leadership does not promote the concept of a rigid dress code; it is believed staff



have the general ability to identify what is appropriate attire for the workplace. For those that may need guidance, below are guidelines that may be helpful:

- The way you dress for working at your computer all day may be different than the way you dress to attend meetings that include our external customers and/or vendors.
- Generally, T-Shirts with sayings, large slogans, etc. are not a good choice for the workplace.
- If you are working out in the field, dress for comfort and for safety.
- Clothing should be without holes and if necessary, pressed.

When you meet someone face-to-face, 93% of how you are judged is based on non-verbal data: your appearance and your body language. Only 7% is influenced by the words that you speak.

(Ramsey, 2009.)

### Housekeeping

While personal appearance is important in conveying you are a professional, confident team member, our work environment-where we spend a great deal of our time- sends a message about who we are as an organization and as individuals.

- Regardless of conference room or meeting ownership, at the conclusion, take a moment to assess your surroundings. Straighten chairs, throw away abandoned water bottles, etc.  
**Goal: leave the room in better shape than when you entered.**
- Your office area tells co-workers and visitors a little bit about who you are. Are you sending a message that is congruent with your intent?
- Generally, if something is out of place, help to create order, even if you don't believe it is your responsibility.

### Suggested Readings:

Manatee County Government Training Portal: [MANATEE COUNTY - Managed Learning Portal \(westnetmlp.com\)](http://westnetmlp.com)

Nir, Michael and Chen. (2013) *Influence and Lead! Fundamentals for Personal and Professional Growth*. Boston: Sapir.

Pink, Daniel. (2006) *A Whole New Mind: Why Right-Brainers Will Rule the Future*. New York: Penguin Group. 2006.



# Employee Performance Evaluation & Pay for Performance

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The Manatee County Administration, through its Performance Evaluation Program, has a firm commitment to providing fair and accurate evaluations of employee performance, assisting employees in their professional growth, and using the performance evaluation as a tool to advance the goals of the County's Mission Statement.

As described by the Manatee County Human Resources Department' informational guidelines, the Employee Performance Evaluation (EPE) is designed to provide both the leadership team and employees with a meaningful approach to assessing and guiding staff performance on an ongoing basis. The specific objectives of the EPE are to:

1. Maintain and improve employee job satisfaction and morale by demonstrating that the leadership team is interested in their job success and career development.
2. Serve as a systematic guide for supervisors in planning and monitoring their subordinates' career development goals.
3. Assure objectivity of employee performance and focus maximum attention on achievement of assigned duties.
4. Facilitate recognition and recording of special talents, skills, and capabilities that might otherwise not be noticed or recognized.
5. Assist in planning personnel assignments and organizational structures that best utilize each employee's capabilities.
6. Provide an opportunity for employees to discuss performance issues and discuss career interests with their supervisor.
7. Although not necessarily the sole governing factor, assemble substantiating data for use as a guide, , for such purposes as wage adjustments, job assignments, training needs, promotions, disciplinary actions, and termination.

ITS promotes the on-going professional growth, mentoring, and acknowledgement of our employees. With that, we are committed to providing our staff on-time evaluations and feedback. For ITS staff, post probationary period (12 months), evaluations are required annually and due at the end of the fiscal year (September 30, 202X).

**EPE-1 Employee Performance Evaluation & Pay for Performance: Key Performance Indicator:** Performance Evaluations will be completed on time (dictated by the above schedule). **Method of confirming achievability:** End of fiscal year report no less than 95%, measured annually.



# Email Etiquette & Policy

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When a staff person sends an email, he/she is presenting an image of single professionalism and representing the organization; while email has been commonplace since the 1980's, etiquette and policy continue to require attention and update. Below are general guidelines to follow when composing, sending and responding to business emails.

- Remember, e-mails are permanent; only write and send what you are comfortable with others reading (even those who are not the intended audience).
- Think before you write. Never send an e-mail when you are emotionally charged.
- Make it a goal to respond within twenty-four hours of receipt. Even if it is only an acknowledgement to let the sender know you have not ignored them.
- If you will be out of the office for more than one business day, use the automated out of office response. Be specific, let the recipient know who they can get in touch with in your absence and when they can expect to hear back from you.
- Use a salutation to open your e-mail and sign your e-mails.
- Never click send until you have read through your e-mail at least once. Look for grammar errors, tone consistency, and misspelling(s).
- **Do not use the *Reply to All* feature when:**
  - Only the original sender needs to know your reply, or**
  - Your comments will be crucial to the original sender and a few other recipients; use *Reply* in this case and add the select other recipients manually.**
- Keep your emails short and to the point.
- If you are asking for something in your e-mail from the recipient, be clear. Have a strong call to action or follow-up task.
- Use bullet points or line breaks to separate thoughts. This will also force you to summarize and condense your thoughts or points.
- Use an e-mail signature.
- Include any target due date in the subject line.
- CC those that do not need to *take-action* but should have a record of the email.
- If you are responding to an email and changing the subject at all, change the subject line too.
- If you are seeking an answer from the email, state the question(s) clearly and separately.
- **Sensitive issues should not be transmitted through email, but rather handled in person or by phone.**
- Delivering a negative answer to an internal customer is considered delivering bad news. Key dialog between customers and vendors should be in person or on the phone.
- Words with judgmental tones are amplified in email. If possible, avoid negative wording.
- When forwarding an email, be aware that you are now sharing a message written to you to a third party. Review whether the original sender would approve of the eventual receiver seeing his/her email.

Additionally, messages sent over the County's email systems are not subject to privacy provisions and may be read by county management, and system administrators at any time. All messages sent or received by county email are county records and subject to possible public records disclosure. The county reserves the right to access and disclose all messages sent over the email system for any purpose. Supervisors may review the email communications of workers they supervise to determine whether they have breached security, violated county policy, or taken other unauthorized actions. The county may also disclose email





messages to law enforcement officials or members of the public without prior notice to the workers who may have sent or received such messages.

**E-1 Key Performance Indicator:** Emails that require follow-up (internal/external customers), or relay information that is essential to the quality of customer service and active work activities, will be acknowledged within 24 hours of receipt. In the event the recipient is out of the office greater than one business day, the out of office function will be enabled providing contact information for a back-up staff person to assist with urgent needs, and to relay when the recipient will return. **Method of confirming achievability:** Self-enforcing, measured by initiated feedback from internal and external customers.



## Service Alignment

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### Business Relationship Management

#### Definition of the Business Relationship Manager (BRM)

A Business Relationship Manager is an employee committed to building internal and external business relationships and is a member of the BRM Team. The BRM builds business relationships and fosters collaboration with key leaders in assigned business areas, those of which include: BCC Departments, Constitutional Offices, the Courts, and ITS.

#### Goal

- To understand the *business* of our partners, their needs and critical business drivers
- To foster ideas for business value opportunities and identify solutions to real business problems that may not otherwise be recognized
- To leverage collective insights of the BRM Team in pursuit of efficiencies through common directions across the County

#### Objectives

- Meet with the assigned Customer BRM quarterly (more often as necessary)
- Meet with Department heads as required
- *On the fly* communication with the Customer BRM as appropriate and necessary
- Solicit updates on projects in procurement status from the assigned departments when relevant and update the IT Services
- Understand the business and their needs. *Note: The BRM does not manage projects (unless assigned as the Project Manager) or act as the Business Analyst (the BRM may provide guidance, when necessary, on the process of gathering requirements)*
- Listen, Facilitate, Negotiate and Communicate
- Have a past, present and future understanding of the business
  - Existing Services - SLAs and Continual Service Improvement (CSI)
  - Efforts currently in flight – requests, projects and work orders
  - Future state planning – Strategic plans and requests
- Act as a liaison and serve as a conduit, when necessary, if normal interaction paths are not providing resolution, relating to new / existing projects, work orders, incidents and other forms of Services. (Note: assistance is not intended to replace normal interaction points and required ITS processes)



such as the Customer Service Center (CSC) or the Project Management Office (PMO), but to facilitate any perceived barriers to progress)

- Have a broad vision of ITS and County functions at-large

#### Success Criteria

- Connect with the customer
  - Does the customer understand the business relationship with ITS?
- Provide transparency into ITS
  - Does the customer find the communication to be of valuable content/completeness?
  - Does the customer understand the ITS business processes?
  - Bring value to the relationship....does the customer recognize the value of Business Relationship Management?
  - Provide Continual Service Improvement (CSI)....what can we do better together?

#### The Role of the Business Relationship Manager

##### REPRESENT THE BUSINESS OF INFORMATION TECHNOLOGY SERVICES

Apply sound business management practices and data-driven decision making. Align our Strategic Business Plan with our Customers' priorities. Enable value-added solutions to real business problems and leverage opportunities. Differentiate our portfolio of services in terms of business value and financial benchmarks.

##### FOCUS ON HIGH-QUALITY SERVICES

Achieve customer satisfaction the first time. Leverage industry best practices and process disciplines to achieve service level commitments. Encourage the identification of ideas, issues and actions necessary for continuous improvement.

##### STRENGTHEN PARTNERSHIPS

Demonstrate our commitment to the success of our customers and to each other. Work *with* our customers to ensure understanding and to build mutual trust and respect. Leverage governance for oversight and direction with clear roles and responsibilities. Thank customers often and be responsive to their business needs!

##### MARKET THE BUSINESS OF INFORMATION TECHNOLOGY SERVICES

Champion the departmental vision and mission. Champion and participate in marketing opportunities for gaining visibility on the products and services offered to our customers. Promote economic stimulus with strategic initiatives that enhance the mission of Government and the Manatee County *Brand*.

**BE AN AMBASSADOR** for the departmental and enterprise vision, mission, and Strategic Business Plan. Function as a catalyst for internal and external change while building consensus around common direction. Take ownership of the Strategic Business Plan and ensure visible staff alignment and prioritization of all strategic projects and initiatives, and daily work activities. Objectivity, flexibility, and adaptability must be the foundation of all decision making in pursuit of the most cost effective and efficient business solutions that meet our customers' business requirements, and that add tangible value to their respective businesses.

##### MAINTAIN DISCIPLINED PROCESS MANAGEMENT

Use the IT Infrastructure Library (ITIL) process framework, to establish and develop a culture of disciplined process management. Comply and enforce the process disciplines and to challenge the status quo as part of a continuous improvement process in support of optimal business services delivery and support.

**BE A CATALYST** for departmental growth in the area of customer service to measure and achieve customer satisfaction. *Be the service provider of choice.* Ask: **"In the presence of competition, would my customer choose me based on my performance and the service I've just provided to them?"** If not, there is room for improvement. Be visible to your customers and to your teammates (who are also your customers). Listen, consider all perspectives, and ensure understanding of your customers' business *Business Value through Partnership...the Service Provider of Choice*



requirements and expectations, and in an environment that encourages cooperation and resolves conflicts.

**CHAMPION PROJECT MANAGEMENT** and the cultural growth of disciplined project portfolio and asset management.

### Core Leader Competencies of the Business Relationship Management Team

**TEAM BUILDING** Encourage open communication and facilitate cooperation within the organization and with customer groups; fosters commitment, team spirit, pride, and trust. Develop leadership in others through coaching, mentoring, rewarding and guiding. Empower others through appropriate sharing of power and authority.

**SERVICE MOTIVATION** Create and sustain an organizational culture that fosters the quality of service essential to high performance. Enable others to acquire the tools and support they need to perform well. Show a commitment to public service. Influence others toward a spirit of service and meaningful contribution to both internal and external customers.

**VISION** Take a long-term view and act as a catalyst for organizational change; build a shared vision with others. Motivate and influence others to translate vision into action. Recognize the Organization's potential for driving performance to higher levels of effectiveness and productivity.

**INFLUENCE/NEGOTIATE** Persuade others; build consensus through give and take; gain cooperation from others to obtain information and accomplish goals; facilitate “win-win” situations.

**INTERPERSONAL SKILLS** Consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations with tact, compassion and sensitivity, and treat others with respect.

**COMMUNICATION** Make clear and convincing oral presentations to individuals or groups at various levels; listen effectively and clarify information as needed to achieve mutual understanding; facilitate an open exchange of ideas and foster an atmosphere of open communication. Express facts and ideas in writing in a clear, convincing, organized, and professional manner.

**ACCOUNTABILITY** Assure that effective and efficient controls are developed and maintained to ensure the integrity of the organization including working within legal authority, structure, and frameworks. Hold self and others accountable for rules and responsibilities.

**PROBLEM SOLVING** Identify and analyze problems; distinguish between relevant and irrelevant information to make logical decisions; offer solutions to individual and organizational problems.

**CORPORATE & SOCIAL RESPONSIBILITY** Champion a culture of collaboration and partnership with other County Government entities in order to support cross functional initiatives and activities.

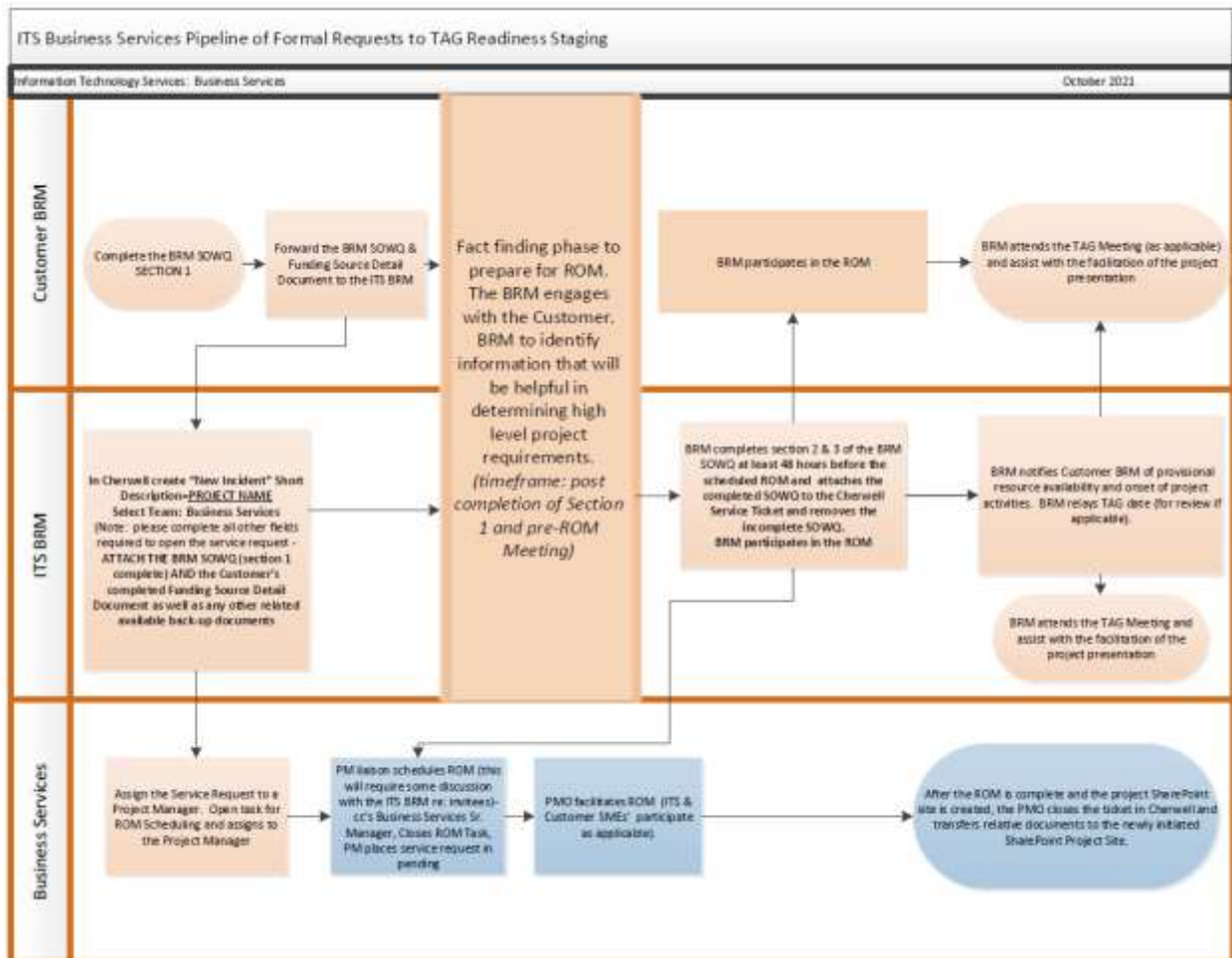
ITS is committed to drive our established Vision and Mission forward to better serve our Customers. With that, and to assist assigned BRMs with process consistency, several informative documents are offered for guidance on the ITS SharePoint site:

<https://mymanatee.sharepoint.com/teams/its/BusinessServices/BusinessRelationshipManagement>

To assist our ITS' Business Relationship Managers in clearly delineating between *wearing the hat* of the BRM at the initiation/request of a project vs. the responsibilities of the Project Management Office (PMO) during the request process, the workflow identified in Figure 1 should be referenced to provide guidance. The “salmon” colored area reflects the process lead initially by the ITS BRM. Process flow beyond what is shown in *Figure 1 Initiate the BRM SOWQ* transitions to the Project Management Office for facilitation.



Figure 1 Initiate the BRM SOWQ

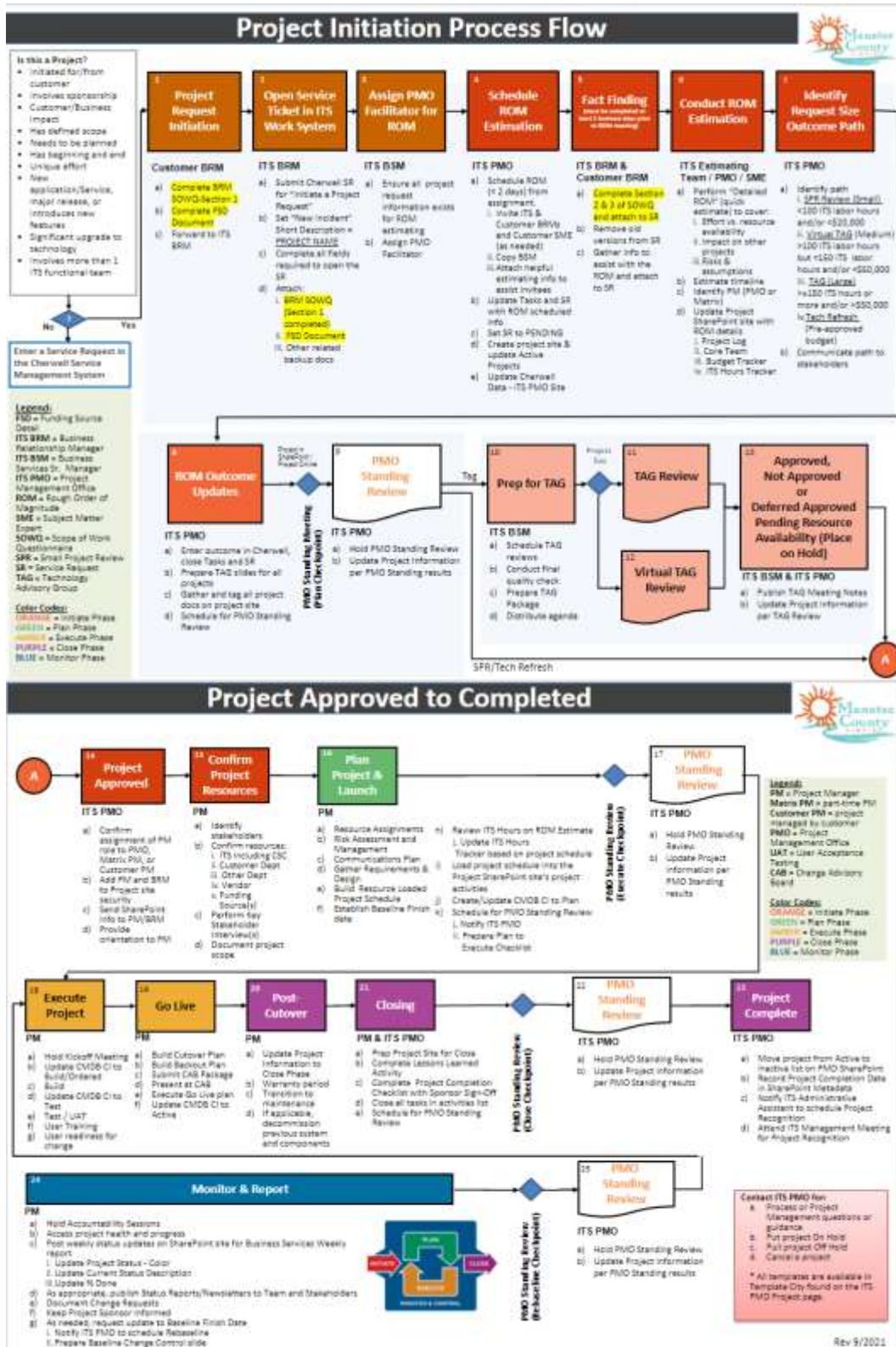


Business Services assigns a Project Manager to assist with leading the workflow required for determining the size of the project and appropriate next steps for moving forward with a review of the project. It should be noted that the work tasks and preparation is not done in isolation within Business Services, rather in collaboration and partnership with the assigned ITS BRM. **And of most importance, the ITS BRM must make it a priority to keep the Customer BRM informed of the most current status throughout the process.** While the initiation of a project request to approval, implementation and closure, is a complex process, the *Figure 2 Project Request to Approval Decision* illustration provides a high-level view of the flow or life cycle established by our organization. Please note the lead role is noted per "task."





Figure 2 Project Request to Approval



**BRM-1 Key Performance Indicator:** After receipt of the BRM SOWQ from the customer (section 1 is completed and is reviewed for accuracy/completion), a ticket will be opened in the Cherwell Service Management System within two business days. *Note: this KPI is measured at the organizational level*

**BRM-2 Key Performance Indicator:** Completion of section 2 and 3 of the BRM SOWQ must be completed and attached to the project request (ticket) within 48 hours of the scheduled ROM. *Note: this KPI is measured at the organizational level.*

**BRM-3 Key Performance Indicator:** Upon assignment of the Cherwell Service Request (project request), the PM facilitator will schedule the ROM within 2 days. *NOTE: This is the act of sending the appointment for the ROM, not the ROM itself. Method of confirming achievability: Date the task was initiated in the Cherwell Service Management System is compared to the date the ROM appointment is sent. NOTE: For tracking our achievability, the Project Manager must include the Business Services Manager as optional on the appointment. No less than 80%, measured monthly.*

**BRM-4 Key Performance Indicator:** A ROM will be conducted with related SMEs within seven business days of the date the appointment was distributed. *Method of confirming achievability: Date the appointment was sent is compared to the date of the scheduled ROM. NOTE: For tracking our achievability, the Project Manager must include the Business Services Manager as optional on the appointment. No less than 80%, measured monthly.*

## Technical Advisory Group (TAG)

Individual county departments often develop and request Information Technology (IT) related projects or funding without the benefit or the knowledge of what other departments are requesting, the resources available, or resource limitations. Making individual decisions on IT projects and/or funding requests has sometimes resulted in duplication of efforts and/or expenditures, acquisition of systems which are incompatible with other systems, expensive recurring maintenance and support, and contributed to a lack of unified priorities and goals. The County Administrator, working through the ITS CIO, is ultimately empowered to make decisions concerning the approval of and prioritization of often competing IT projects, and for making recommendations to the County Commission. To assist, regular input is needed from a variety of county staff members with subject-matter and/or managerial expertise.



Each department Director's designated Customer Business Relationship Manager is expected to make all IT related project and funding requests, for the current or future fiscal year, through the ITS Business Relationship Manager. Depending on defined thresholds related to the size of the project, the request is submitted to the Technology Advisory Group (TAG). Reviewing members include the Deputy County Administrators, the Financial Management CFO and the IT CIO. Projects are evaluated based on factors including business value, scope, schedule, total cost of ownership and other factors such as project risk, ease of implementation, whether the project will duplicate an already available technology, which projects will provide the most increase in efficiencies for county government, how long the project request has been pending, legal requirements, and available financial resources. The TAG will take into consideration the requesting Department's self-report of project priority, as well as the impact on other projects in the ITS Project Portfolio to determine, should a project be agreed upon to move forward, implementation timeframes, funding and resources.



The TAG meets monthly to review large project requests, discuss potential (future) project needs, prioritize project work, and obtain status updates on projects already in flight. A virtual TAG review is available monthly for those projects that are deemed “medium” in size. Small projects (less than 100 resource hours and/or less than \$19,999) are reviewed for planning with the requesting department and ITS.

**Virtual TAG Projects:** greater than 100 ITS labor hours, but less than 150 ITS labor hours and/or greater than \$19,999, but less than \$50,000 (excludes ITS resource hours).

- Requires the completion of the Business Relationship Managers Statement of Work Questionnaire (BRM SOWQ)
- Requires the completion of the Funding Source Detail Document
- Requires the “Initiate Project Request” Cherwell Service Ticket
- Requires the Rough Order of Magnitude (ROM) Review (size/path of project is determined at the ROM Review)
- A Virtual TAG Project is determined via the ROM Review and is placed in ITS’ project repository/tracker software as a “Formal Request,” and identified as “Virtual TAG”
- Virtual TAG Projects will be forwarded (as a package) on the first Tuesday of the month to TAG Members
- ITS Business Services is responsible for facilitating the Virtual TAG process and notifying the Customer when the TAG responses are returned

**TAG Projects (Large):** 150 ITS labor hours or more and/or greater than \$49,999

- Requires the completion of the Business Relationship Managers Statement of Work Questionnaire (BRM SOWQ)
- Requires the completion of the Funding Source Detail Document
- Requires the “Initiate Project Request” Cherwell Service Ticket
- Requires the Rough Order of Magnitude (ROM) Review (size/path of project is determined at the ROM Review)
- TAG project (Large) is determined via the ROM Review and is placed in ITS’ project repository/tracker software as a “Formal Request,” and identified as “TAG-Month”
- Large Projects are placed on the next available TAG Agenda for review

## Project Management

The ITS Project Management Office (PMO) establishes the process (what happens) and provides coaching/mentoring to support the procedures (how to) established for the successful planning, initiation, execution and closure of projects. The Business Services PMO follows the Project Management Book of Knowledge (PMBok) as best practice from a non-prescriptive approach and aims for establishing an effective repeatable pathway to managing the project life cycle. The focus is to create consistency for our customers and improve the quality of project management in terms of delivering on budget, within scope, and on time.

**PM-1 Key Performance Indicator:** For projects transitioning from the planning to execution phase: when the Baseline Project Schedule/Work Plan is complete and agreed upon by the Project Sponsor, the assigned Project Manager will notify the PMO within two business days of intent to formally present the project status transition at the next PMO Standing Meeting. (The Project Manager will complete the required presentation slides and review at the next scheduled PMO Standing Meeting). **Method of confirming**





**achievability:** *Date the baseline schedule was agreed upon compared to the date the PMO was notified of a request for a change in the project status. No less than 85%, measured weekly (via the pro-active portfolio review meeting).*

**PM-2 Key Performance Indicator:** For large projects transitioning from execution to close out, the assigned Project Manager must obtain formal acceptance from the identified Project Sponsor before closing the project in the project tracking application. The Project Manager will obtain *Project Acceptance* agreement via email and archive the email on the project tracking application (stored in the related project folder). **Method of confirming achievability:** *PM attaches Project Acceptance email as required. The PMO confirms the document is signed off on appropriately and archived. PMO to document successful completion. No less than 75%, measured weekly (via the pro-active portfolio review meeting).*

**PM-3 Key Performance Indicator:** For large projects transitioning from execution to close out, and after the *Project Acceptance (PM-2) email* has been acknowledged by the Project Sponsor, the PM will complete the *Information Technology Services Project Close-Out Document* and present at PMO Standing meeting. Upon completion, the *Information Technology Services Project Close-Out* document must be archived in the project tracking application (stored in the related project folder). **Method of confirming achievability:** *PM attaches the Information Technology Services Project Close-Out Document as required. The PMO confirms the document is signed off on appropriately and archived. PMO to document successful completion. No less than 75%, measured weekly (via the pro-active portfolio review meeting).*

**PM-4 Key Performance Indicator:** The assigned Project Manager will monitor and track ITS Resource Hour estimates throughout the project lifecycle and measure projected ITS Labor Hours against the ITS Labor Hours as captured in the initial ROM of the project. For projects that fall outside the -25% to +75% range, as defined in the initial Project ROM, the Project Manager will notify the PMO Manager and create a TAG Update package that will be reviewed, refined and approved within 5 business days of the notification to the PMO Manager.

**Method of confirming achievability:** *The PMO Manager will confirm the TAG Update package is accurate and approved for release for the next TAG update within 5 days of PMO Manager being notified that ITS Resource Hours are outside of initial ROM defined range. PMO to document successful completion and release of TAG Update package. No less than 85%, measured weekly (via the pro-active portfolio review meeting).*




## Customer Service Management

Outside of Administrative Activities and Large/Medium/Small Projects, which **do not** require memorialization in the Customer Service Management System (Cherwell), ITS direct (internal/external) customer service provisions are accounted for through the Cherwell Service Management System. While it is recognized that an incident is generally very clear by definition, determining the difference between a large/medium/small project, a work effort or a service request can be more difficult to define. The below information is used as a guideline to assist staff in determining the appropriate “categorization.”

<p><b>Project</b></p> <ul style="list-style-type: none"> <li>■ Involves sponsorship</li> <li>■ Inter-divisional/business/customer impact</li> <li>■ Has a start and a finish</li> <li>■ Major release or new features</li> <li>■ Significant upgrade</li> <li>■ New application</li> <li>■ Requires coordinated planning</li> <li>■ May require an RFP</li> <li>■ Unique</li> <li>■ Planned</li> </ul>	<p><b>Work Effort</b></p> <ul style="list-style-type: none"> <li>■ Originates within ITS</li> <li>■ Small low risk</li> <li>■ Generally repeatable effort</li> <li>■ No impact to CMDB</li> <li>■ Can involve more than one ITS Functional Team</li> </ul> <p>Example:</p> <ul style="list-style-type: none"> <li>■ Point Releases</li> <li>■ Minor Updates</li> <li>■ Improvements</li> <li>■ Fiber/Copper installation (construction projects only-not in the Business Services Project Portfolio)</li> </ul>
<p><b>Incident</b></p> <ul style="list-style-type: none"> <li>■ Break/Fix</li> <li>■ One-offs</li> <li>■ Quick (usually)</li> <li>■ Keep the lights on</li> <li>■ Operational</li> <li>■ Unplanned</li> </ul>	<p><b>Service Request</b></p> <ul style="list-style-type: none"> <li>■ Standard Requests</li> <li>■ Not Unique</li> <li>■ In Service Catalog</li> <li>■ Small Effort</li> <li>■ Not a Major Upgrade</li> <li>■ It's not broken, but not as large as a project</li> <li>■ Planned</li> </ul>

The categorization of work activity is the first essential step in determining the appropriate process to respond/assist the customer with a business need. **Efforts to bypass this first step will lead to an inconsistent approach to serving the customer.** Quality customer service begins with consistency in the process of delivering the service. As such, the customer will have the same expectations of the process every time, regardless of which ITS staff person is providing the service. The chart on page 26 is used as a guideline to determine the appropriate process approach to **initiating, tracking and memorializing customer (internal and external) requested needs, and assist with determining resource availability and appropriate assignment.**



COMMON NAME ■ "HALLMARKS"	SOURCE	GOVERNING PROCESSES	COORDINATION	SYSTEM REQUIREMENT	SYSTEM CLASSIFICATION	ATTRIBUTE	DOCUMENTATION REQUIREMENTS												
<b>Project</b> ■ Involves Sponsorship ■ Inter-Divisional/Business/Customer Impact ■ Has a Start and a Finish ■ Major Release or New Features ■ New Application ■ Requires Coordinated Planning ■ Unique ■ Planned	Request from Business / Customer	TAG (Large) or Virtual TAG (Medium) SFR (small) CAP	MPM/Tech Lead	Fit in PM System Sharepoint (Highly Integrated with Microsoft Project Online)	Sharepoint "Small"	Discretionary & Mandatory	SOW/C Funding Source Detail Document ROM Estimate TAG Presentation Slides												
	IT Internal w/Cross Div Impact / Business / Customer Impact		PM/MPM		Sharepoint "Medium"														
					Sharepoint "Large"														
<b>Work Effort</b> ■ Originates within ITS ■ Small Low Risk ■ Generally repeatable effort ■ No Impact to OMOB ■ Can involve more than one ITS Team Fiber/Copper installation (construction projects only-not in the Business Services Project Portfolio)	IT Internal	Cherwell Approval via Team Manager and Business Services	Tech Lead	Enter in Cherwell Work Effort	Cherwell Work Order System	Discretionary & Mandatory	n/a												
<b>Incident</b> ■ Break/Fix ■ One-Offs ■ Keep the Lights On ■ Operational ■ Unplanned	Customer/IT User Contacts CSC. For incidents, Customers and ITS must call the CSC to report. Customers initiating a Service Request may also create the request via the Cherwell Service Desk Portal.	CSC	Serv Desk + Tier 2/3	Cherwell Service Management System	Cherwell Work Order System Incident Service Request	Mandatory	Work Order												
<b>Service Request</b> ■ In Service Catalog ■ Small Effort ■ It's Not Broken But Not As Large As a Project ■ Somewhat routine/not unique ■ Can involve more than one ITS Functional Team						Discretionary & Mandatory													
	<b>Acronyms:</b> CAP: Change Advisory Panel CSC: Customer Service Center MPM: Major PM PM: Project Manager SFR: Small Projects Review TAG: Technology Advisory Group (Medium & Large Projects)					<b>Project Size Definition</b> <table><thead><tr><th></th><th>ITS Labor</th><th>Additional Costs</th></tr></thead><tbody><tr><td>Small</td><td>0-100 hours</td><td>and this is true &gt;\$20,000</td></tr><tr><td>Medium</td><td>101-249 hours</td><td>and/or this is true \$20,000-\$49,999</td></tr><tr><td>Large</td><td>250+ hours</td><td>and/or this is true \$50,000</td></tr></tbody></table>			ITS Labor	Additional Costs	Small	0-100 hours	and this is true >\$20,000	Medium	101-249 hours	and/or this is true \$20,000-\$49,999	Large	250+ hours	and/or this is true \$50,000
	ITS Labor	Additional Costs																	
Small	0-100 hours	and this is true >\$20,000																	
Medium	101-249 hours	and/or this is true \$20,000-\$49,999																	
Large	250+ hours	and/or this is true \$50,000																	

**SM-1 Key Performance Indicator:** Using the Categorization Chart above, all ITS (non-administrative) labor efforts will be identified and tracked for progression in the appropriate "system." **Method of confirming achievability:** self-enforcing, measured by initiated feedback from internal and external customers. Reviewed as warranted by Supervisor/Manager/Director. Review of Project Portfolio (projects) and extracted from the Service Management System: Service Request and Incident Tasks assignment-quantity/complexity reviewed for inclusion and discussion in EPE review. Overall results included in EPE review no less than 100% measured annually.

### Service Request

External customers may initiate a Service Request by way of the (1) ITS Customer Service Portal, by (2) email using the itscsc@mymanatee.org, or by (3) contacting the ITS Customer Support Center (directly). To ensure our customers' experience is consistent and responded to as efficiently and effectively as possible, a Service Request may only be initiated using the above three pathways.

### What to do if a customer contacts you directly to initiate a Service Request (this excludes the CSC Staff):

**By Phone:** "I appreciate your call; to make certain someone is available to answer your call when you have a request, our Customer Service Center (CSC) will initiate your service request....let me transfer you over so they can open the ticket and gather all of the information needed to get the request appropriately assigned. For future reference, their extension is 5807."

If a voicemail was left (you were unavailable), forward the call to the Customer Service Center with the related contact information and a representative will follow up with the customer to initiate the Service Request. Send an email to the customer letting them know that you have forwarded his/her request to our Customer Service Center and a representative will be in contact. Provide the Customer Support Center extension.



By Email (excludes [itcsc@mymanatee.org](mailto:itcsc@mymanatee.org)): “[Greeting], to make certain your request is acknowledged and assigned correctly, I have forwarded this email over to our Customer Service Center. They will open a Service Request and contact you if additional information is needed. I want to make certain your inquiries/requests are handled as quickly as possible, and I may be away from my desk or out of the office; for future requests, please contact the Customer Service Center directly.” (Provide the Customer Service Center extension.)

**SM-2 Key Performance Indicator:** The Customer Service Center is responsible for assisting external customers with the initiation of a service request (if not initiated via the self-service portal or using the itcsc email). *Note: this excludes the initiation of a service request for the BRM SOWQ process (ticket is owned by Business Services).* **Method of confirming achievability:** Information related to Service Request “created by” is extracted from the Customer Service Management System. Target is 90%

**SM-3 Operational Metric:** Percentage of Service Request Tickets with a response time (primary staff person assignment-post authority approval) less than or equal to seven days. **Method of confirming achievability:** Information related to Service Request assigned (staff person) versus authority approval time stamp is extracted from the Customer Service Management System. Target is 80%. Reviewed monthly.

### *Closing Service Requests*

Closing Service Requests in a timely, responsive and quality manner, is important to track customer issues and requests, measure our ability to successfully serve our customers, and plan the use of our resources in the most efficient and effective manner.

**SM-4 Service Management:** Operational Metric: Percentage of Service Request Tickets (upon receipt of request-post authority approval) with a resolution duration greater than 30 business days (5 business days for Public Records Requests). **Method of quantifying:** Information related to Service Request assigned (staff person-post authority approval) versus closed date is extracted from the Customer Service Management System. Target: 85%

**SM-5 Operational Metric:** Number of “reopened” Service Requests. **Method of quantifying:** Customer Service Management System Report. Reviewed monthly.

Communication is a key ingredient in continual service improvement. A quick email to a customer regarding a lingering service request can often be the difference between customer satisfaction and customer frustration; while we may be working diligently on a request or waiting on a vendor, if we are not communicating the status with the customer, there is only silence and the perception that there is no work being done. Additionally, updating the Service Ticket in the “journal tab” when warranted memorializes the latest status and work being done in the Service Management System, information that is invaluable to first level support for pro-active follow up with the customer.

**SM-6 Key Performance Indicator:** Service Request Tickets will be updated, using the “journal tab” as work is conducted relative to the service request. **Method of confirming achievability:** Information related to Service Request “owned by” with a status of “closed” is extracted from the Customer Service Management System. No less than 85% collective average measured annually.



## **Incident**

*(break/fix-unplanned interruption of IT service or reduction in the quality of an IT service)*

Incidents must be reported, and a ticket must be initiated directly to/by the CSC; this requirement applies to internal staff/customers and external customers. The Customer Service Center is responsible for opening the Incident Ticket, resolving or escalating as appropriate.

- **External customers reporting incidents outside of the Customer Service Center must be redirected to the Customer Service Center by transfer or provision of the CSC support extension.**
- If the incident was reported via email (outside of the [itscsc@mymanatee.org](mailto:itscsc@mymanatee.org) email address), the staff person will contact the CSC to report the incident based upon the information provided. The staff person will respond to the email indicating the incident has been reported to the CSC and provide the CSC extension for follow up.

**SM-7 Key Performance Indicator:** The Customer Service Center is responsible for initiating all incident tickets. **Method of confirming achievability:** *Information related to Incidents “created by” is extracted from the Customer Service Management System. No less than 100% measured monthly.*

## **Closing Incidents**

Closing Incidents in a timely, responsive, and quality manner, is important to tracking customer issues and requests, measuring our ability to successfully serve our customers, and to plan the use of our resources in the most efficient and effective manner.

**SM-8 Operational Metric:** Number of Incidents with resolution time (upon receipt of request) greater than (at maximum-see Incident Management Section, page 28) seven business days. **Method of confirming achievability:** *Provided through Power BI Customer Service Management Report. No more than 15%, measured monthly.*

**SM-9 Operational Metric:** Number of “reopened” Incidents. **Method of quantifying:** *Power BI Customer Service Management Report. Reviewed monthly.*

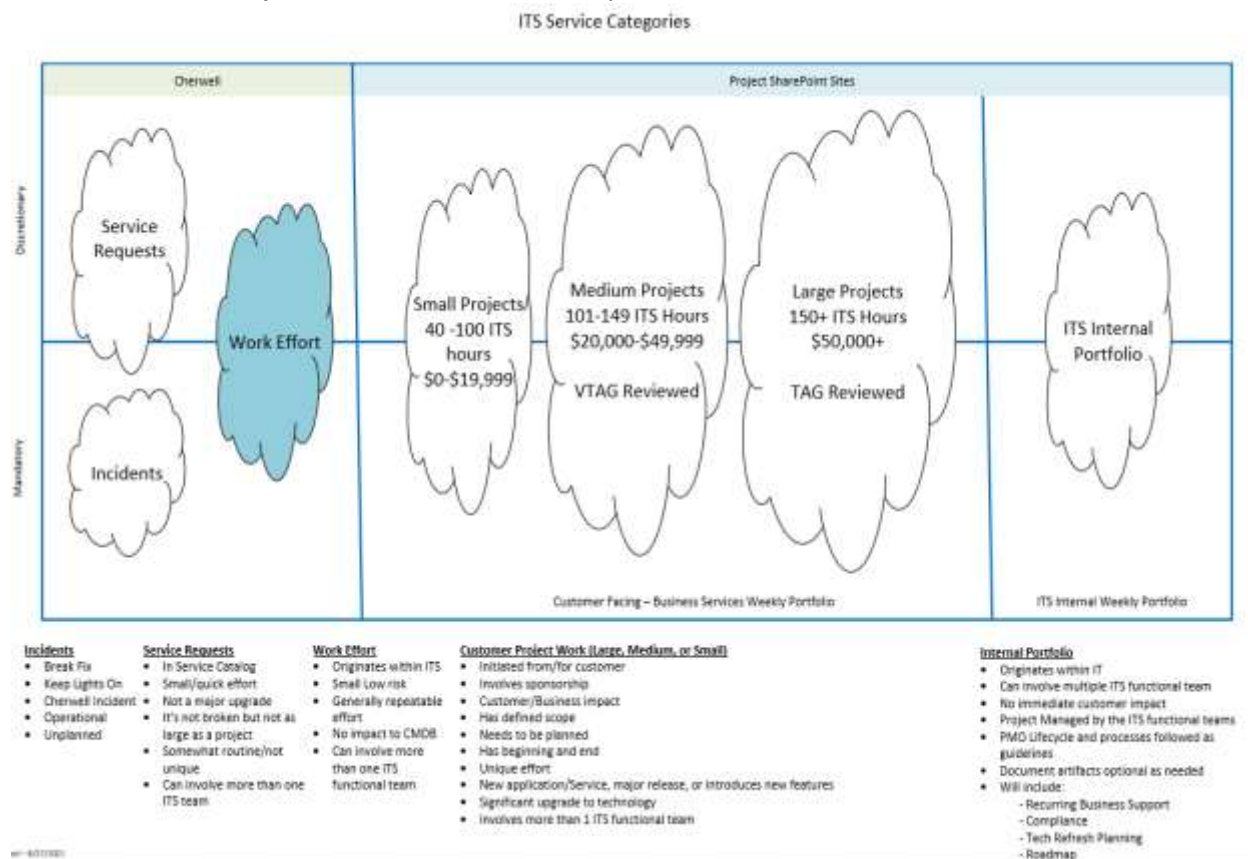
**SM-10 Key Performance Indicator:** Incident Tickets will be updated, using the “journal tab” as significant milestone/changes occur relative to the incident. **Method of confirming achievability:** *Information related to the Task “owned by” with a status of “closed” is extracted from the Customer Service Management System. A Random Sampling of 20% of total number of assigned Incidents/Tasks per month is reviewed for journal entry updates. No less than 85% collective average, measured annually.*



## Work Effort

A **Work Effort** originates within the ITS department (not external customer driven). Typically requires coordination with more than one staff person.

For **Construction Projects**, a **Work Effort** may be opened to track **fiber and/or copper installation**. These efforts are often long (months) in duration, require timing coordination with the construction project manager, but are not defined as an ITS project. The owner of the Work Effort logs the activity in the Business Services Project Portfolio Construction Pipeline.



The approval authority will review the Cherwell Work Effort for completion, level of effort accuracy, and to confirm the Work Effort meets the definition(s) above. Reminder: Opening a **Work Effort** would not be an alternative to following the process for small, medium, and large project review and approval.

## Closing a Work Effort

Once a **Work Effort** is completed, all tasks should be closed. When closing the **Work Effort**, enter the close description.

After entering the close description, the action will prompt the user for a Cause Code. Using the drop-down arrow, select: Work Effort Complete.



# ITIL Expectations: In Practice

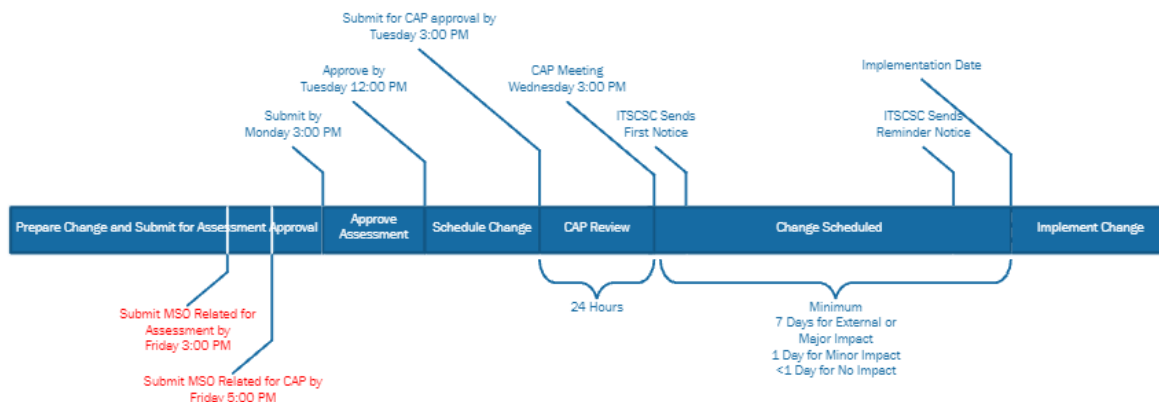
Our Organization's current implementation of the ITIL non-prescriptive practices are continually maturing; we strive for forward progress and to build our processes and procedures based upon best practice. With that, and while not all inclusive, it is important to memorialize our current *primary focus* of process improvements:

## Availability Management

Optimize the capability of the ITS infrastructure, services, and supporting entities to deliver a cost effective and sustained level of service availability that meets business requirements. Ensure availability levels are met at established service level targets. Review business requirements for the needed availability of business systems.

## Change Management

The purpose of Change Management is to protect and maintain the integrity of production systems by means of identification, scheduling, coordination, and control of system changes. ITS recognizes the importance of the Change Management Discipline and the Change Manager role is identified in our organizational structure. Detailed instructions, roles and responsibilities can be found on the SharePoint Change Management Site. A Change Management Request is entered through our Customer Service Management System, Change Management Module. A summary process review and designated/identified responsibilities are provided in Figure 3.



It is the responsibility of the Change Owner to ensure the change is ready for implementation before submitting a Change.

The Change Owner should ensure the following have been completed:

- An implementation plan has been developed to the appropriate level of detail to ensure successful implementation.
- Risks have been assessed and documented.
- The change has been tested (to the extent possible)
- All required resources have been identified and allocated
- All stakeholders have been consulted

Changes must be submitted 48 hours prior to the CAP Meeting and 9 days prior to the desired implementation date for external or major impact changes.

This lead time allows:

- The CAP members to assess the impact of the change
- The ITSCSC to communicate with the user community and other stakeholders
- The user community to plan work accordingly

Figure 3 Change Management Summary Process





**CM-1 Change Management:** Page 27, **Operational Metric:** Number of Incidents reported as a direct result of a standard, normal, or emergency change. **Method of quantifying:** *Provided through Customer Service Management System Report. Reviewed monthly.*

**CM-2 Operational Metric:** Number of Standard, Normal, and Emergency Changes. **Method of quantifying:** *Customer Service Management System Report. Reviewed monthly.*

## Incident Management

*Internal Organizational Level Agreement: Major Incident- Priority Code 1 & 2*

This procedure has been put in place to memorialize Information Technology Services requirements for responding and investigating Major Incidents (Priority Code 1 & 2).

**Major Incident:** Defined as an event which has significant impact or urgency for the business, and which demands a response beyond the routine incident management process. Incidents categorized as Major, impact a significant number of users, or left with no urgency, have the potential to grow in terms of impact and/or number of users affected. Priority Code is defined as Priority Code 1: *Critical*, Priority Code 2: *High*. **The primary goal is to get the service up/running at optimum, whether through a permanent fix or work-around.**

Two Step Priority Assignment:

Urgency	Impact			
		High	Medium	Low
	High (Critical Service)	1	2	3
	Medium (Support Service)	2	3	4
	Low (Other)	3	4	5

Priority Code	Description	Target Response Time	Target Resolution Time
1	Critical	Immediate	1 hour
2	High	10 Minutes	4 hours
3	Medium	1 Hour	1 business Day
4	Low	4 Hours	3 business Days
5	Very Low	1 Day	7 business days

The information obtained via the question monologue, investigation and diagnostic script (below) must be memorialized (via **Customer Service Center**) in the Major Incident ticket. If an internal Functional Team is reporting the Major Incident (Priority 1 & 2) to the Customer Service Center, the related lead functional team member must provide the information obtained via the question monologue to the Customer Service Center:

Question Monologue required:

- What is not working that used to work?
- Is it affecting anyone else in your area?
- What is the hardship of this not working?
- What have you tried so far?
- Has anything changed?



#### Investigation and Diagnostic:

- When did it stop working?
- Can you reproduce the error message? (if Yes, gather steps)
- If it is an internet browser issue - try another browser
- If it is an external address - try on mobile phone
- When was the last time you restarted your PC?
- Is anything else not working, e.g., Internet Explorer, Outlook, Intranet (have user check all)
- Are other similar calls coming in?

CSC contacts the Tier 2 Incident Coordinator via (cell) phone and provides the information obtained via the *Question Monologue, Investigation and Diagnostic questions*.

#### Primary Owner of the Tier 2 Major Incident Resolution Process:

**Tier 2 Incident Coordinator:** determines/confirms the incident is Priority Code 1 or 2. Leads compliance of OLA, summarizes initial issue, manages Functional Team Members duties, approves confirmation of resolution or work-around and relays information to the Customer Service Center (CSC). Coordinates and facilitates post Major Incident wrap up-lessons learned as applicable. Confirms the CSC has memorialized resolution in the Service Management System (Knowledge Article). Works in coordination with the Change Manager as applicable.

- Coordinates intra-functional team communication between the CSC and related ITS functional teams, opens bridge/Webex/Microsoft teams (**Tier 2 Incident Coordinator discretion**), communicates to the functional team leads-*bridge* is open, provides ongoing communication to the CSC as defined below, if no email: via phone/face to face to CSC.

#### Engaging functional team leader(s) (process for engagement is during normal working hours

The Incident Coordinator will initiate contact with the functional team(s) designated working hours on-call staff person(s).

**Telecom:** Ron Hardy: XXX.XXX.XXXX

**Radio:** Ed Cittadino: XXX.XXX.XXXX

**Operations:** Networking: ext: 8792, Security ext: 8794, Sys Admin ext: 8796

**Applications & Development:** ext: 5717

**GIS:** ext: 8790

**Client Services:** ext: 5878

The Functional Team Manager is responsible for assuring a staff person is assigned to the daily on-call role. To assure an immediate response, the extension will be forwarded to the staff person's cell phone.

#### Communication Cadence

- Upon receiving notification or <sup>1</sup>identifying a Major Incident (Priority Code 1 and 2)- first communication is required back to the CSC **within one half hour if not resolved, or immediately upon resolution (whichever is sooner)**. Communication will include:
  - **Diagnosis/high level assumption of issue (as provided by the Incident Manager)**
  - **Assumed impact (services)**
  - **Current efforts for resolution**

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<sup>1</sup> A major incident identified (intra-divisional) outside of the customer service center is immediately reported to the customer service center to initiate the ticket and OLA Process.



- **Anticipated downtime**
- **Second and on-going communication same day until 5:00 p.m.: Duration-every hour.**  
Communication will include the information from the previous update and an update of the following:
  - **Diagnosis/high level assumption of issue (as provided by the Incident Manager)**
  - **Assumed impact (services)**
  - **Current efforts for resolution**
  - **Anticipated downtime**
- **Post 5:00 p.m: when resolved or an update at 7:00 p.m., 9:00 p.m., etc., until resolution.**  
**Communication mode: via email to the ITSCSC and email to the Leadership Team, ITSMGRS.**  
(a continued/on-going major incident impacts CSC staffing pattern for the following morning).  
Communication will include the information from the previous update and an update of the following:
  - ITSCSC/ITSMGRS AND the ITS Incident Coordinators (Ron Hardy/Chris Solan)
    - **Diagnosis/high level assumption of Issue (as provided by the Incident Manager)**
    - **Assumed impact (services)**
    - **Current efforts for resolution**
    - **Anticipated downtime**

NOTE: the above approach for continued triage, post 5:00, is only for those Major Incidents defined as Priority 1 or 2, that carry over from the traditional working hours. Any Major Incidents, defined as a Priority 1 or 2, identified initially after the normal working hours will follow the already established on-call procedure that is in place.

### **Technical Lead**

Technical Lead Role: Primary point for triage and resolution, provides updates to the Tier 2 Incident Coordinator, leads/coordinates technical tasks with other technical staff as applicable, confirms resolution or identifies work-around and relays to the Tier 2 Incident Coordinator.

### **Customer Service Center (CSC): Primary Communicator, Owner of Priority 1 & 2 Ticket (CSC Supervisor or delegate)**

Internal Communication: Using the outlook template, the CSC Primary Communicator sends email notification to the Leadership Team (ITSMGRS) and cc's the ITS Incident Coordinators (Ron Hardy/Chris Solan) of a Major Incident (Priority Code 1 & 2) and high-level summary.



### Template example:

The screenshot shows a form titled 'Major Incident Notification'. It includes fields for 'Major Incident #', 'Priority Code', 'When', 'Symptoms', 'Impact', 'Assumed Functional Teams Required', and 'Incident Manager'.

**Primary Communicator Role:** confirms initial information (question monologue) has been completed appropriately, engages Incident Manager, engages Change Manager, manages the CSC team duties, opens Major Incident Ticket, updates Major Incident ticket, closes ticket appropriately, communicates with external customers via ITSCSC email as applicable.

ITSCSC email:

- **High level assumption of Issue (as provided by the Incident Manager)**
- **Assumed impact (services)**
- **Anticipated downtime**

### Change Manager

Change Manager Role: Reviews Change Log for possible correlation to Major Incident.

The **Tier 2 Incident Coordinator**, with coordination from the related functional team leads, will assign/confirm the resolution/mitigation participants. Staff members outside of that team **will not** be engaged in the Major Incident triage, except when explicitly requested by the **Tier 2 Incident Coordinator** or functional team leads. The **Tier 2 Incident Coordinator** must be notified in the event other staff members, not initially assigned, are requested to engage.

*Note: Incident Management for Priority Codes 3,4,5, are managed by the CSC Supervisor or delegate.*

Major Incident Applications/Systems **Examples:**

<i>*Critical (aim resolution is 1 hour)</i>	<i>*High (aim resolution is 4 hours)</i>
CAD 911	Chameleon
OneSolution (enterprise wide)	Workforce (situational)
CWA (no options available for payment-vendor supported -primary support: Utilities)	Cherwell Service Management System
Accela (enterprise impact)	OnBase
VoIP (enterprise impact)	Cityworks
ESRI GIS (enterprise impact)	Automatic Job Scheduling
Onguard Facilities (enterprise impact)	SCADA (situational)
Trapeze (situational)	CivicLive (situational)
Everbridge (situational)	Paradigm Compuweigh

*\*Certain services are provided to Manatee County Government by outside vendors; outside Vendor contractual terms and conditions related to response time may differ from what is identified in this document. When an incident requires the engagement of an outside vendor, the contracted terms and conditions of the vendor agreement will supersede the ITS response times.*

### **CSC Managed/Coordinated Incidents: Cherwell Priority Codes 3,4, &5**

Priority Code 3 - Medium

- A VIP
- A moderate number of staff are affected and/or not able to do their job properly
- A moderate number of customers are affected and/or inconvenienced in some way



- The financial impact of the Incident is (for example) likely to exceed \$1,000 but will not be more than \$10,000
- The damage to the reputation of the business is likely to be moderate

#### Priority Code 4 - Low

- A user can work - not at optimal capability
- A minimal number of staff are affected and/or able to deliver an acceptable service, but this requires extra effort
- Testing and troubleshooting require more time and multiple divisions
- The financial impact of the Incident is (for example) likely to be less than \$1,000.
- The damage to the reputation of the business is likely to be minimal.

#### Priority Code 5 - Very Low

- Issue is not affecting the user from doing daily work
- A very minimal number of user(s) are affected and/or inconvenienced but not in a significant way
- Incident mitigation may require scheduling at the convenience of the customer
- No financial impact is indicated
- No damage to the reputation of the business is indicated

## Problem Management

Identify, mitigate, and prevent the adverse impact of incidents and problems on the business that are likely caused by errors in the infrastructure or software bug. The Problem Manager drives root cause analysis and problem resolution.

**Problem Definition** –one or more incidents with an unknown root cause for something that is in production AND a work-around is available to the customers (as applicable). The incidents are something broken in the operational side of the house. The goal is to identify the underlying cause of the incidents and find a permanent solution. A problem should always have a related incident. Problem Management is used for diagnosing root cause, finding resolution and documenting the end results.



A problem isn't: a place to park things with a known resolution, but don't have time to fix. If there is an incident and there is a **valid work around** and the **root cause is known**, confirm the work around mitigates the incident and close the incident. Open a service request for the appropriate functional team.

Problems are opened in the Cherwell Service Management by the CSC and after consultation with the Problem Manager for validity. An assigned Problem Owner will manage the resolution of the problem and, upon resolution, add a task for the CSC to notify customer(s), confirm resolution, and then close the CSC task. The Problem Owner will be responsible for closing the Problem in the Cherwell Service Management System.

## Strategic Service Owner(ship)

### Selection of the Service Owner

- Familiarity with the product
- Opportunity for interaction with design and overall maturity of the product
- History/Knowledge of the product. Some knowledge of the legacy product (when applicable)



- Service relationship with other products/integration and history of those products
- Familiarity with the infrastructure and key staff that support the under-pinning of the service
- Knowledge of the user base and a working knowledge of the end users' expectations.
- The ability to foster vendor relationships and act as the liaison between the department and the vendor as appropriate

#### When is the Service Owner Assigned?

During the Service Design Stage. The Service Owner is a key part of the Project Team and is included in all phases of the implementation project. From Design to Service Operation and follow on to Continual Service Improvement.

The Leadership Team approves the Service Owner Assignment.

#### Criteria for assigning a Service Owner (for a product/service):

- Outward facing with a large customer impact and high utilization are three considerations for prioritization (of assignment and until the Service Owner Discipline is established and uniformity is confirmed)
- ITS Relationship/owned/primary responsibility for support

The Leadership Team approves the product/service for service owner assignment (at the time the service owner nomination is reviewed).

#### Responsibilities Include:

- Licensing count/on-going need/cost impact negotiation
  - Enters Service Owner contact information and all relative licensing information into the Cherwell Configuration Management Database: Application
  - Enters a summary of the service and completes all relative Cherwell fields
  - Updates Cherwell as applicable
- Assistance with annual Maintenance and Support review and contract negotiations, as applicable
- Identifies and reviews enhancement considerations and impact
- Serves as a primary SME and liaison for a major incident related to the service
- Responsible for initiation and facilitation of lessons learned-post major incident
- Responsible for assuring post-project punch list/*work order* requirements have been identified and assigned for action/follow-up (this task should be completed at the project close out meeting, as applicable)
- Participates in SLA and OLA negotiations related to the service



# Operational Metrics & Key Performance Indicators Reference Guide

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L-1 Leadership: Page 8, **Key Performance Indicator:** To encourage leadership and trust throughout the organization, as titled leaders we will commit and role model The Thirteen Behaviors of High Trust (Covey, 2008). **Method of confirming achievability:** Self-enforcing, measured by initiated feedback from peers and internal and external customers.

SR-1 Standard of Reciprocity: Page 12, **Key Performance Indicator:** Individuals may volunteer or be assigned tasks/projects outside of their traditional functional team as necessary and when it promotes better service to the customer and/or encourages professional growth. **Method of measurement:** documented for inclusion and recognition on the employee's annual performance evaluation no less than 85%.

EPE-1 Employee Performance Evaluation & Pay for Performance: Page 14, **Key Performance Indicator:** Performance Evaluations will be completed on time. **Method of confirming achievability:** Monthly report received by Human Resources (compare for accuracy) no less than 95%, measured monthly.

E-1 Email Etiquette & Policy: Page 16, **Key Performance Indicator:** Emails that require follow-up (internal/external customers), or relay information that is essential to the quality of customer service and active work activities, will be acknowledged within 24 hours of receipt. In the event the recipient is out of the office greater than one business day, the out of office function will be enabled providing contact information for a back-up staff person to assist with urgent needs, and to relay when the recipient will return. **Method of confirming achievability:** Self-enforcing, measured by initiated feedback from internal and external customers.

BRM-1 Business Relationship Management: Page 21, **Key Performance Indicator:** After receipt of the BRM SOWQ from the customer (section 1 is completed and is reviewed for accuracy/completion), a ticket will be opened in the Cherwell Service Management System within two business days. **Method of confirming achievability:** Date on the BRM SOWQ compared to the opening date of the Cherwell ticket. No less than 95%, measured monthly. *Note: this KPI is measured at the organizational level.*

BRM-2 Business Relationship Management: Page 21, **Key Performance Indicator:** Completion of section 2 and 3 of the BRM SOWQ must be completed and attached to the project request (ticket) within 48 hours of the scheduled ROM. *Note: this KPI is measured at the organizational level.*

BRM-3 Key Performance Indicator: Page 21, upon assignment of the Cherwell Service Request (project request), the PM facilitator will schedule the ROM within 2 days. *NOTE: This is the act of sending the appointment for the ROM, not the ROM itself.* **Method of confirming achievability:** Date the task was initiated in the Cherwell Service Management System is compared to the date the ROM appointment is sent out. *NOTE: For tracking our achievability, the Project Manager must include the Business Services Manager as optional on the appointment.* No less than 80%, measured monthly.

BRM-4 Business Relationship Management: Page 21, **Key Performance Indicator:** A ROM will be conducted with related SMEs within seven business days of the date the appointment was distributed.





**Method of confirming achievability:** *Date the appointment was sent is compared to the date of the scheduled ROM. NOTE: For tracking our achievability, the Project Manager must include the Business Services Manager as optional on the appointment. No less than 80%, measured monthly.*

PM-1 Key Performance Indicator: Page 22, For projects transitioning from the planning to execution phase: when the Baseline Project Schedule/Work Plan is complete and agreed upon by the Project Sponsor, the assigned Project Manager will notify the PMO within two business days of intent to formally present the project status transition at the next PMO Standing Meeting. (The Project Manager will complete the required presentation slides and review at the next scheduled PMO Standing Meeting). **Method of confirming achievability:** *Date the baseline schedule was agreed upon compared to the date the PMO was notified of a request for a change in the project status. No less than 85%, measured weekly (via the pro-active portfolio review meeting).*

PM-2 Key Performance Indicator: Page 23, For large projects transitioning from execution to close out, the assigned Project Manager must obtain formal acceptance from the identified Project Sponsor before closing the project in the project tracking application. The Project Manager will obtain *Project Acceptance* agreement via email and archive the email on the project tracking application (stored in the related project folder). **Method of confirming achievability:** *PM attaches Project Acceptance email as required. The PMO confirms the document is signed off on appropriately and archived. PMO to document successful completion. No less than 75%, measured weekly (via the pro-active portfolio review meeting).*

PM-3 Key Performance Indicator: Page 23, For large projects transitioning from execution to close out, and after the *Project Acceptance (PM-2) email* has been acknowledged by the Project Sponsor, the PM will complete the *Information Technology Services Project Close-Out Document* and present at PMO Standing meeting. Upon completion, the *Information Technology Services Project Close-Out document* must be archived in the project tracking application (stored in the related project folder). **Method of confirming achievability:** *PM attaches the Information Technology Services Project Close-Out Document as required. The PMO confirms the document is signed off on appropriately and archived. PMO to document successful completion. No less than 75%, measured weekly (via the pro-active portfolio review meeting).*

PM-4 Key Performance Indicator: Page 23, The assigned Project Manager will monitor and track ITS Resource Hour estimates throughout the project lifecycle and measure projected ITS Labor Hours against the ITS Labor Hours as captured in the initial ROM of the project. For projects that fall outside the -25% to +75% range, as defined in the initial Project ROM, the Project Manager will notify the PMO Manager and create a TAG Update package that will be reviewed, refined and approved within 5 business days of the notification to the PMO Manager.

**Method of confirming achievability:** *The PMO Manager will confirm the TAG Update package is accurate and approved for release for the next TAG update within 5 days of PMO Manager being notified that ITS Resource Hours are outside of initial ROM defined range. PMO to document successful completion and release of TAG Update package. No less than 85%, measured weekly (via the pro-active portfolio review meeting).*

SM-1 Service Management: Page 25, **Key Performance Indicator:** Key Performance Indicator: Using the Categorization Chart on page 25, all ITS (non-administrative) labor efforts will be identified and tracked for progression in the appropriate "system." **Method of confirming achievability:** *self-enforcing, measured by initiated feedback from internal and external customers. Reviewed as warranted by*



***Supervisor/Manager/Director. Review of Project Portfolio (projects) and extracted from the Service Management System: Service Request, Incident Tasks, and Work Effort assignment-quantity/complexity reviewed for inclusion and discussion in EPE review. Overall results included in EPE review no less than 100% measured annually.***

SM-2 Key Performance Indicator: Page 26, The Customer Service Center is responsible for assisting external customers with the initiation of a service request (if not initiated via the self-service portal or using the itcsc email). *Note: this excludes the initiation of a service request for the BRM SOWQ process (ticket is owned by the PMO).* ***Method of confirming achievability: Information related to Service Request “created by” is extracted from the Customer Service Management System. Target is 90%***

SM-3 Service Management: Page 26, SM-3 Operational Metric: Percentage of Service Request Tickets with a response time (primary staff person assignment-post authority approval) less than or equal to seven days. ***Method of confirming achievability: Information related to Service Request assigned (staff person) versus authority approval time stamp is extracted from the Customer Service Management System. Target is 80%. Reviewed monthly.***

SM-4 Service Management: Page 26, Operational Metric: Percentage of Service Request Tickets (upon receipt of request-post authority approval) with a resolution duration greater than 30 business days. ***Method of quantifying: Information related to Service Request assigned (staff person-post authority approval) versus closed date is extracted from the Customer Service Management System. Target: 85%***

SM-5 Service Management: Page 26, Operational Metric: Number of “reopened” Service Requests. ***Method of quantifying: Customer Service Management System Report. Reviewed monthly.***

SM-6 Service Management: Page 26, ***Key Performance Indicator:*** Service Request Tickets will be updated, using the “journal tab” as work is conducted relative to the service request. ***Method of confirming achievability: Information related to Service Request “owned by” with a status of “closed” is extracted from the Customer Service Management System. No less than 85% collective average, measured annually.***

SM-7 Service Management: Page 27, ***Key Performance Indicator:*** The Customer Service Center is responsible for initiating all incident tickets. ***Method of confirming achievability: Information related to Incidents “created by” is extracted from the Customer Service Management System. No less than 100%, measured monthly.***

SM-8 Service Management: Page 27, ***Operational Metric:*** Number of Incidents with resolution time (upon receipt of request) greater than seven business days. ***Method of confirming achievability: Provided through Customer Service Management System Report. No more than 15%, measured monthly.***

SM-9 Service Management: Page 27, ***Operational Metric:*** Number of “reopened” Incidents. ***Method of quantifying: Customer Service Management System Report. Reviewed monthly***

SM-10 Service Management: Page 27, ***Key Performance Indicator:*** Incident Tickets will be updated, using the “journal tab” as significant milestone/changes occur relative to the incident. ***Method of confirming achievability: Information related to the Task “owned by” with a status of “closed” is extracted from***



***the Customer Service Management System. A Random Sampling of 20% of total number of assigned Incidents/Tasks per month is reviewed for journal entry updates. No less than 85% collective average, measured annually.***

CM-1 Change Management: Page 30, **Operational Metric:** Number of Incidents reported as a direct result of a standard, normal, or emergency change. **Method of quantifying: Provided through Customer Service Management System Report. Reviewed monthly.**

CM-2 Change Management: Page 30, **Operational Metric:** Number of Standard, Normal, and Emergency Changes. **Method of quantifying: Customer Service Management System Report. Reviewed monthly.**



# Glossary

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**Administrative Activities:** Meetings (not related to projects or specific work order activities, example: staff meetings, human resource meetings, wellness activities, etc.) lunch, vacation.

**Baseline Operational Performance:** The rate (outcome/output) of the metric indicator before intervention, measured, tracked, documented at an organizational level

**Emergency Change:** A change that must be introduced as soon as possible. For example, to resolve a Major Incident or implement a security patch.

**External Customer:** Receives services from the organization/department but is not directly part of the organization/department.

**Internal Customer** An employee who receives services produced elsewhere within the department as inputs to his/her work.

**ITIL:** IT Infrastructure Library, a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business. ITIL describes processes, procedures, tasks, and checklists which are not organization-specific, but can be applied by an organization for establishing integration with the organization's strategy, delivering value, and maintaining a minimum level of competency. It allows the organization to establish a baseline from which it can plan, implement, and measure. It is used to demonstrate compliance and to measure improvement.

**Key Performance Indicator:** Key metric used to measure the achievement of critical success factors. KPIs underpin critical success factors and are measured as percentage.

**Mission Statement:** A statement of the purpose of an organization, a company, a cause; *it is the reason for existing.*

**Normal Change:** A change that follows the complete change management process. By default, every change follows the normal change process, unless it is classified as a standard change or is time-critical.

**Operational Metric:** Quantitative in nature, generally used as the framework for building key performance indicators.

**Standard Change:** A change to a service or infrastructure which is pre-authorized, low risk, relatively common, follows a procedure or work instruction.

**Standard of Reciprocity:** Organizational requirement or parameter guidelines for mutual exchange/interaction.

**Vision Statement:** A statement that provides the most important goal of the organization; it is what all service objectives lead to.



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