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Introduction

Information Technology Services (ITS) exists to enable the business of Manatee County Government, and to provide business solutions and opportunities for efficiencies for the customer. Under the direction of the County Administrator, 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 information assets, ensuring business continuity, and targeting a discipline of continual service improvement. The adoption of strategic planning, project management and service management best practices, are adding real business value to county operations in the form of 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 mutually 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” to a collective organization of high skills, with high accountability and an aura of professionalism, coupled with a passion to provide quality services that matter to our customers.

Purpose

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

ITS is the hub of all things with a technical under coat 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 mutual customer, the citizens of Manatee County.

We are guided in a best approach to practicing our core values and serving 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 efficient, quality customer service, and do not preserve alignment with our “ITS Priorities.” 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 and work and play. (ACE-Accountability, Civility, and Ethics)
Our Vision & Mission

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

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

The Customer is 1st, 2nd, and 3rd 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
Reactive Response to Proactive Consistency
Technology Refresh with Business Continuity
Leadership

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

ITS is comprised of 72 positions. Our day to day operations and our work to assist customers in preparing for an anticipated increased citizen demand are supported through the dedicated staff of ITS. There are nine management level positions, responding directly to the ITS Director. 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 their 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 staff/co-workers. 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.

(Banter, 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 and 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

*Business Value through Partnership...the Service Provider of Choice*
 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:** or 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. Relied upon to ensure that projects are within areas of specific responsibility and are completed in a timely manner and within budget. Monitors and evaluates plans. 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 linkages 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. These partnerships will typically involve some level of voluntary work that extends beyond normal duties. 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:


Standards of Engagement & Interaction

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 and rule bound.
- Be a catalyst for forward thinking and creativity....think outside of the box.

At a quarterly County Leadership Team Meeting in January, 2015, 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 encouraging:

...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

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 organizational boundaries. While ITS is aligned functionally by the type of service provided, the “separation” is merely on paper via the traditional organizational chart. Each individual’s effort is focused on OUR organizational enterprise. With that, each individual will assist and align with staff across the department to keep an eye toward the ultimate 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 no less than 85%.


The Professional

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 work place.
- If you are working out in the field, dress for comfort and for safety.
- Clothing should be without holes, and pressed if necessary.

**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:**


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 learn of performance problems and discuss career interests with their supervisor.

7. Assemble substantiating data for use as a guide, although not necessarily the sole governing factor, 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 evaluation and feedback. For non-exempt employees, post probationary period (six months), evaluations are required annually and due by the end of the anniversary month of hire. For exempt staff, evaluations are required using Human Resources “common date” requirements, initiated annually on October 1 and due by October 31.

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

As recently as 2012, over 90 million Americans accessed email through a mobile device and 64% were doing so on a daily basis. (Snapp, 2014) While moving through our County’s transition from our legacy email application to Exchange, it was revealed that county employees (enterprise) had managed to stow away enough email to consume approximately six terabytes of storage.

When a staff person sends an email, he/she is presenting an image of single professionism and representing the department; 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 absolutely comfortable with others (even those who are not the intended audience) reading.
- 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, spelling and proper English.
- **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 know for 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. This would include any email where constructive feedback is involved, or where it could be interpreted as criticism.**
- Delivering a negative answer to an internal customer is considered delivering bad news. Key dialogs between customers and vendors should be in person or on the phone.
- Words with judgmental tones are amplified in email. Avoid negative words, if possible.
• 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.

• Internal emails may have a different level of professionalism than those that get sent externally. In either case, it is appropriate to use proper grammar. (Macworld, 2015)

Additionally, messages sent over the County’s email systems are not subject to the 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 its 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. More information regarding email policy can be found: http://home.intranet/inet/home/procedures/it-policies/it-policy.html#jump10

**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 also to relay when the recipient will return. **Method of confirming achievability:** Self-enforcing, measured by initiated feedback from internal and external customers.

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**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

• Participate in BRM Team Meetings
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 CSC or 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 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 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 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:

<table>
<thead>
<tr>
<th>BRM Information/Document</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRM Assignment(s)</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>BRM Overview</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>BRM Roles and Responsibilities</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>BRM SOW Questionnaire</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>BRM SOW Workflow</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>Funding Source Detail Document</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
<tr>
<td>Project Request to Approval Decision Process (TAG/PMO)</td>
<td>INet-ITS-PMO-Initiating</td>
</tr>
</tbody>
</table>

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](image-url)
The PMO 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 the PMO, 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.”

**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. **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 20, **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. **Method of confirming achievability:** Date of Cherwell ticket initiation (initial) compared to the date the completed BRM SOWQ is attached to the service ticket (this is when the ITS BRM will assign a task to the assigned PM to initiate the ROM. **No less than 85%, measured monthly.** Note: this KPI is measured at the organizational level.

**BRM-3 Key Performance Indicator:** Upon completion of the BRM SOWQ and after a task has been initiated in the Cherwell Service Management System for the PM to initiate the ROM, an appointment will be distributed for the related ROM within two business 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 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 the resource limitations in place. Making individual decisions on IT projects and/or funding requests has, over time, resulted in duplication of efforts or expenditures, acquisition of systems which are incompatible with other systems, expensive recurring maintenance, support, and training needs, and contributed to a lack of unified priorities and goals. The County Administrator, working through the ITS Director, 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 concerning funding IT projects in future fiscal years. To assist the County Administrator in making such decisions, regular input is needed from a variety of county staff members with subject-matter or managerial expertise.

Each Department Director’s designated Customer Business Relationship Manager is expected to make all IT related project and funding requests, either for the current or future fiscal year, through the ITS Business Relationship Manager or the ITS Customer Service Center. Depending on certain 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, Financial Management Director, the IT Director, and others relative to the requested project. Each staff member assigned the duty of evaluating IT project/funding requests, evaluate requested projects based on factors including business value, scope, schedule, and 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 project requests, discuss potential (future) project needs, prioritize project work, and obtain status updates on projects already in flight.

**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 PMO follows the Project Management Book of Knowledge (PMBoK) as best practice from a prescriptive approach, and aims for establishing an effective repeatable pathway to managing the project life cycle. The ITS PMO 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 use the *Project Acceptance Sign-Off Sheet* for Sponsor sign-off and archive the document in the project tracking application (stored in the related project folder). *Method of confirming achievability: PM attaches Project Acceptance Sign-Off Sheet 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 Sign-Off Sheet* has been acknowledged by the Project Sponsor, the PM will complete the *Information Technology Services Project Close-Out Document* and obtain the required signatures. 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).*

**Customer Service Management**

Outside of Administrative Activities and Large/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/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.”

<table>
<thead>
<tr>
<th>Project</th>
<th>Work Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Involves Sponsorship</td>
<td>■ Intra-Divisional Only</td>
</tr>
<tr>
<td>■ Inter-Divisional/Business/Customer Impact</td>
<td>■ Originates within ITS</td>
</tr>
<tr>
<td>■ Has a Start and a Finish</td>
<td>■ Point Releases</td>
</tr>
<tr>
<td>■ Major Release or New Features</td>
<td>■ Minor Updates</td>
</tr>
<tr>
<td>■ Significant Upgrade</td>
<td>■ Fixes / Improvements</td>
</tr>
<tr>
<td>■ New Application</td>
<td>■ Can be Project Size</td>
</tr>
<tr>
<td>■ Could be Annual or Bi-Annual</td>
<td>■ Tends to be Smaller</td>
</tr>
<tr>
<td>■ Requires Coordinated Planning</td>
<td></td>
</tr>
<tr>
<td>■ May Require an RFP</td>
<td></td>
</tr>
<tr>
<td>■ Unique</td>
<td></td>
</tr>
</tbody>
</table>
The categorization of the work activity is the first essential step in determining the appropriate process to responding/assisting 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 below is used as a guideline to determine the appropriate approach to **initiating, tracking and memorializing customer (internal and external) requested needs**, and assist with determining resource availability and appropriate assignment.

<table>
<thead>
<tr>
<th>Common Name</th>
<th>Incident</th>
<th>Service Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>Request from Business / Customer</td>
<td>Service Request</td>
</tr>
<tr>
<td>Governing Processes</td>
<td>Change Management</td>
<td>Standard Requests</td>
</tr>
<tr>
<td>Coordination</td>
<td>PM/MPM</td>
<td>Not Unique</td>
</tr>
<tr>
<td>System Requirement</td>
<td>TAG (large)</td>
<td>In Service Catalog</td>
</tr>
<tr>
<td>System Classification</td>
<td>PM/MPM</td>
<td>Small Effort</td>
</tr>
<tr>
<td>Attribute</td>
<td>PM/Lead</td>
<td>Not a Major Upgrade</td>
</tr>
<tr>
<td>Documentation</td>
<td>PM/Lead</td>
<td>It’s Not Broken But Not As Large As a Project</td>
</tr>
<tr>
<td>Requirement</td>
<td>SOW/ Estimate</td>
<td>Planned</td>
</tr>
</tbody>
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<td>SOW/ Estimate</td>
<td>Planned</td>
</tr>
</tbody>
</table>

**Chart:**

- **Planned**
- **Incident**
  - Break/Fix
  - One-Offs
  - Quick (usually)
  - Keep the Lights On
  - Usually a WO
  - Operational
  - Unplanned
- **Service Request**
  - Standard Requests
  - Not Unique
  - In Service Catalog
  - Small Effort
  - Not a Major Upgrade
  - It’s Not Broken But Not As Large As a Project
  - Planned
Key Performance Indicator: Using the Categorization Chart on page 23 (also located on the INet: http://home.intranet/inet/home/departments/information-technology/it-divisions/pmo/pmo-documents.html) as a guide, 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 itscsc@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.)

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 itscsc 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%

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 tracking customer issues and requests, measuring our ability to successfully serve our customers, and planning the use of our resources in the most efficient and effective manner.

SM-4 Service Management: Page 25, Operational Metric: Percentage of Service Request Tickets (upon receipt of request-post authority approval) with a resolution duration greater than 30 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%**


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 and for monitoring the progress of the service ticket.

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 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 90%, measured monthly.**
Key Performance Indicator: Number of Incidents resolved at first level resolution.  
*Method of confirming achievability:* Provided through Customer Service Management System Report. No less than 80%, 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.

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


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.

**ITIL Expectations: In Practice**

While our Organization’s current implementation of the ITIL prescriptive practices are rudimentary, 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 a Change Manager is identified in our organizational structure and within the Client Services Functional Team. 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 is provided in Figure 3.
Figure 3 Change Management Summary Process


Incident Management
Restore service operation as quickly as possible with minimum impact to the customer. Improve mean time to resolution (MTTR) and mean time between failures (MTBF).

Problem Management
Identify, mitigate, and prevent the adverse impact of incidents and problems on the business that are caused by errors in the infrastructure. Drive 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 customer (as applicable). The incidents are something broken in the operational side of the house. The goal is to deal with solving 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
  o Enters Service Owner contact information and all relative licensing information into the Cherwell Configuration Management Database: Application
  o Enters a summary of the service and completes all relative Cherwell fields
  o Updates Cherwell as applicable
• Annual Maintenance and Support review and negotiations
• Identifies and reviews enhancements 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)
• Participates in SLA and OLA negotiations related to the service
Operational Metrics & Key Performance Indicators
Reference Guide

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 (dictated by exempt/non-exempt time schedule). 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 also 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 20, 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 20, 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. Method of confirming achievability: Date of ROM appointment compared to the date the completed SOWQ is attached. No less than 85%, measured monthly. Note: this KPI is measured at the organizational level.

BRM-3 Business Relationship Management: Page 20, Key Performance Indicator: Upon completion of the BRM SOWQ, and after a task has been initiated in the Cherwell Service Management System for the PM to initiate the ROM, an appointment will be distributed for the related ROM within two business 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 Project Management: Page 22, 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).

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PM-3 Project Management: Page 22, Key Performance Indicator: For large projects transitioning from execution to close out, and after the Project Acceptance Sign-Off Sheet has been acknowledged by the Project Sponsor, the PM will complete the Information Technology Services Project Close-Out Document and obtain the required signatures. 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).

SM-1 Service Management: Page 24, Key Performance Indicator: Using the Categorization Chart on page 23 (also located on the iNet: http://home.intranet/inet/home/departments/information-technology/it-divisions/pmo/pmo-documents.html) as a guide, 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.

SM-2 Key Performance Indicator: Page 25, 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 24, 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 25, Operational Metric: Percentage of Service Request Tickets (upon receipt of request-post authority approval) with a resolution duration greater than 30 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-6 Service Management: Page 25, **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 26, **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 90%, measured monthly.**

SM-8 Service Management: Page 26, **Key Performance Indicator:** Number of Incidents resolved at first level resolution. **Method of confirming achievability: Provided through Customer Service Management System Report. No less than 80%, measured monthly.**

SM-9 Service Management: Page 26, **Operational Metric:** Number of Incidents with resolution time (upon receipt of request) greater than seven days. **Method of confirming achievability: Provided through Customer Service Management System Report. No more than 15%, measured monthly.**

SM-10 Service Management: Page 26, **Operational Metric:** Number of “reopened” Incidents. **Method of quantifying: Customer Service Management System Report. Reviewed monthly**

SM-11 Service Management: Page 26, **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 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.

Glossary

**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.
Table of Reference


“A Short History of Email.” macworld.com. Web. 21 July. 2015


