

IT Services Management Service Brief

Capacity Management

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Introduction

A primary focus of IT Service Management (ITSM) is the application of IT best practices (founded in ITIL) to enable IT to be a more effective service provider across the enterprise to satisfy the organization's business requirements.

Although managing the IT infrastructure itself is a necessary component of most ITSM solutions, it is not the primary focus. Instead ITSM addresses the need to align the delivery of IT services closely with the needs of the business. This involves a transformation of the traditional *Business - IT paradigm* into one that is process-oriented, proactive, and enterprise wide. This service provider paradigm encompasses IT best practices using the perspectives of people, process, technology, organization, and integration.

Within this ITSM service provider paradigm there are several focus areas such as business objectives, service level objectives, and technology infrastructure that along with other areas play critical roles in the ITSM methods and best practices.

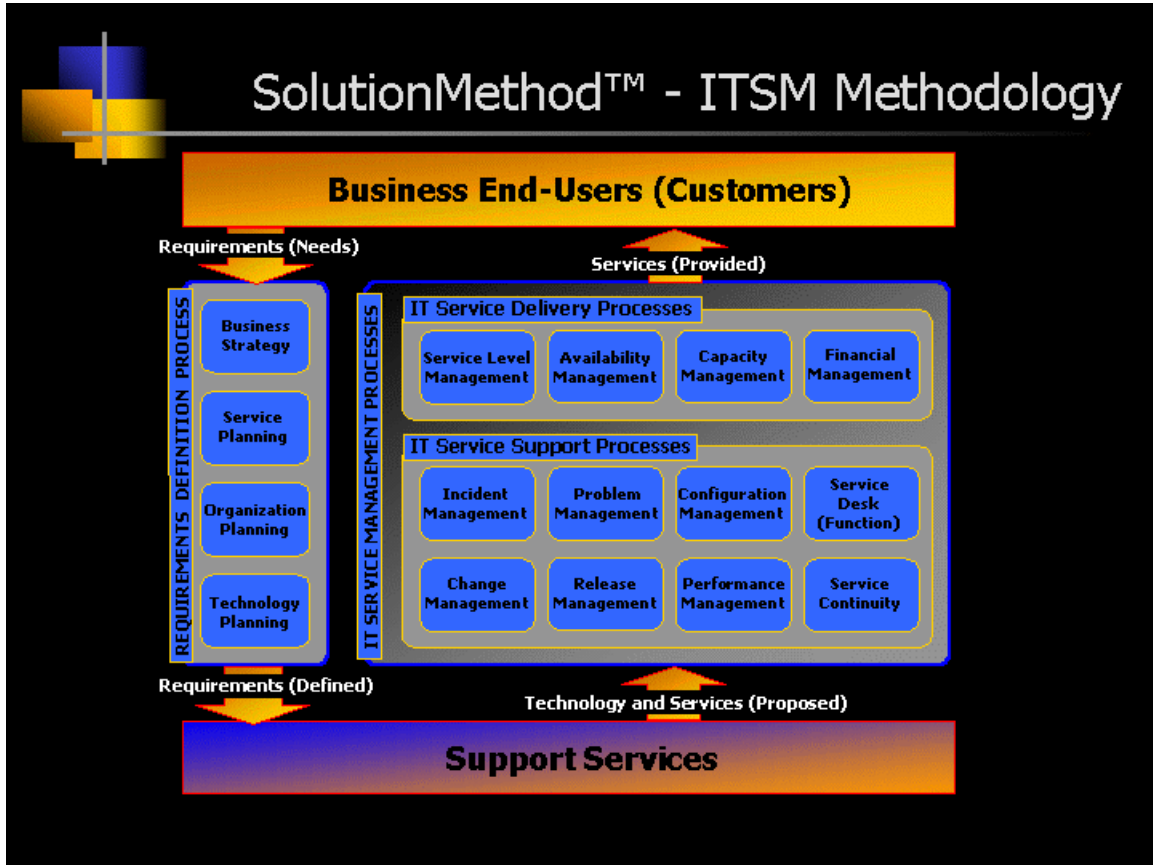
Capacity Management provides a detailed level analysis or profile of existing IT technology infrastructure resource performance and utilization that can be used to develop a detailed capacity plan that will determine future IT technology resource requirements. Capacity Management processes and techniques, based on business unit drivers, can employ several usage profiles that will link business plans and workload forecasts directly to estimates of resource and service level objectives. Once developed, these techniques and profiles provide a basis for an ITSM Capacity Management methodology that can be used tactically and strategically within customer specific ITSM best practices. Capacity Management is part of the **SolutionMethod™** IT Service Delivery Processes.

SolutionMethod™ - A Roadmap to ITSM

SolutionMethod™ describes a service methodology framework for ITSM that is based on ITIL best practices. The focus of **SolutionMethod™** is to enable service, its delivery and management. It is an iterative methodology that has multiple entry points but most typically begins with business end-users/Customer requirements and concludes with a qualification and quantification of services provided to satisfy those requirements both tactically and strategically.

This evolutionary approach enables organizations the ability to adaptively integrate best practices based on their specific maturity level and priorities.

SolutionMethod™ employs a phased approach to ITSM that consists of assessment, architecture and design, planning, implementation, and support. With each phase 5 perspectives of people, process, technology, organization, and integration are evaluated.



The high level goal for ITSM *structure* encompasses the following:

- 1) Determine the current, existing IT infrastructure, processes, and services
- 2) Develop a desired future state of IT and the services it needs to provide
- 3) Architect a "roadmap" that depicts how to get to the desired state from the current state
- 4) Determine the steps needed to execute the "roadmap"

The **SolutionMethod™** ITSM *framework* for each of the ITIL Service Delivery and Service Management areas is a 5 phase model:

- **Assessment** - determine the current state and begin to collect and understand the metrics for the future desired state
- **Architect and Design** - develop a mature design for the future state

- **Planning** - develop those plans necessary to achieve the future desired state in a phased evolutionary fashion
- **Implementation** - implement and deploy the plans within IT and across the enterprise to achieve the future desired state
- **Support** - manage, maintain, and improve the future desired state being able to adaptively integrate enhancements as needed or required

Within this *framework*, **SolutionMethod™** effectively enables managing IT, as an enterprise wide, service oriented entity comprised of 5 separate and distinct *perspectives*:

- **People** - quantity and quality of expertise and knowledge
- **Process** - IT and organization specific practices, procedures, guidelines, etc. and the level of complexity and sophistication of them
- **Technology** - total logical and physical technology infrastructure that consists of hardware, software, communication networks, applications, DBMS, etc.
- **Organization** - internal and external business factors that affect IT, how IT and the organization interface, what is the organizations "corporate culture", what are the organization's direction and how does that affect IT
- **Integration** - how is IT integrated within the business model, what services does IT provide, how are the services provided, and how are best practices employed within IT

Scope and Objectives

The overall goal of this service is to assess and plan for tactical and strategic technology infrastructure in the ITSM Capacity management areas within the 5 perspectives.

The specific goal of this service is to focus on customer specific business unit requirements in order to project resource and service level requirements thereby aligning business requirements to current and projected IT technology utilizations and requirements.

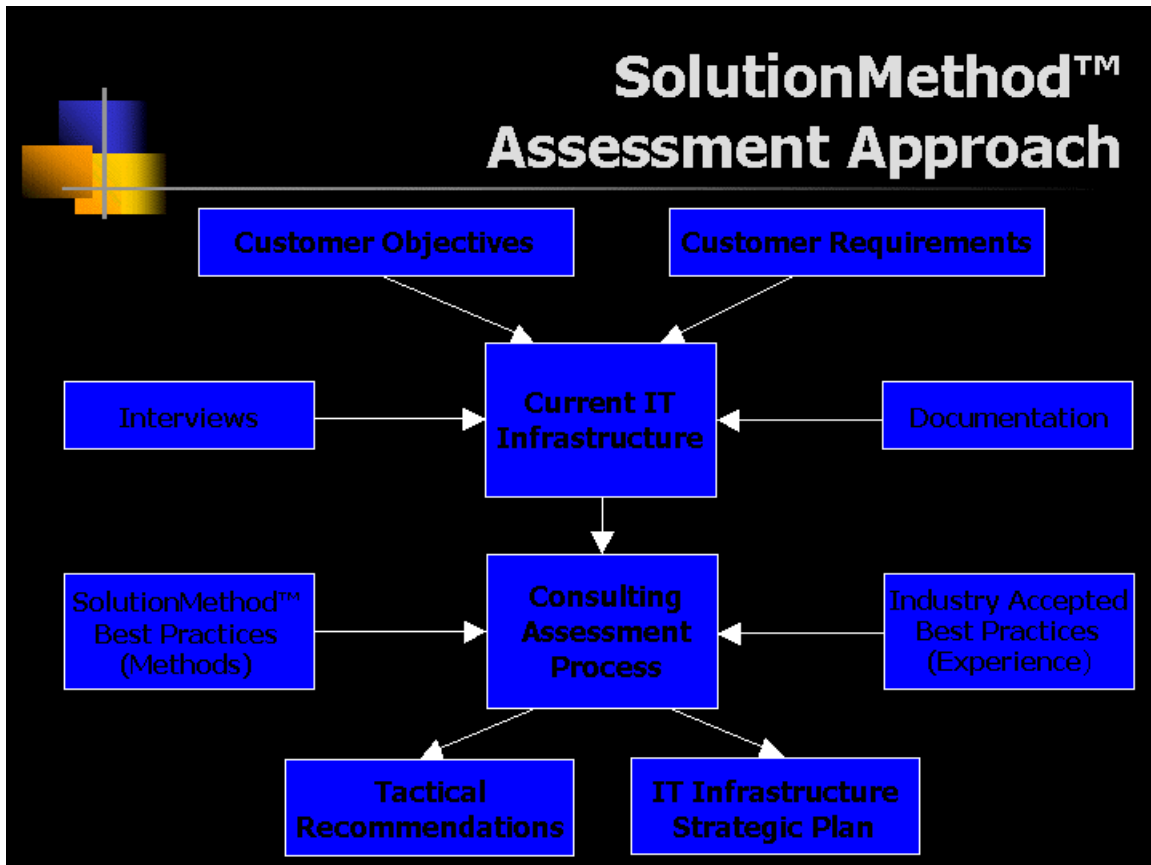
The objective of the Capacity Management Service is to develop a macro level capacity management methodology that uses business unit growth to efficiently and effectively determine accurate estimates of resource utilization requirements and service level requirements.

The final outcome of this service is to assess and plan a unique, customer best practice capacity management process that includes the appropriate synergy, dependencies, and linkages to other processes like availability, service planning,

performance management, configuration management, and financial management. This service will provide the customer with a model to be used for developing a tactical and strategic position and direction for ITSM best practices.

Approach

The SolutionMethod™ approach depicted below is used for this Capacity Management service.



The following is a high-level list of tasks for this service:

- 1) Assemble a project team that includes the appropriate skill sets necessary to complete a successful project engagement
- 2) Conduct a project kick-off meeting between the consulting team and a comparable organization team. At this meeting an initial project plan will be developed and refined. This plan will be used to document, plan, and track the activities and results of the engagement.
- 3) Gather and assemble all appropriate information about the customer's current capacity management processes, its inter-relationship and

dependencies. This includes existing capacity planning, hardware and software technology planning, financial planning, budget cycles, and performance management. In addition any customer objectives, requirements, and expectations for a desired future state. This information is supplied from existing documentation, interviews with the required organization personnel, and observation.

- 4) Analyze the information gathered as it relates to findings in the areas of IT service management and the processes that support it. This analysis will focus on organization's people, processes, technology, organization, and integration perspectives both in a tactical and strategic perspective. It will specifically focus on satisfying tactical requirements and strategic positioning to include full ITSM positioning.
- 5) Analyze the current Capacity Management process that includes but is not limited to:
 - The procedures that define the steps used in capacity and performance management
 - The objectives of what capacity management needs to accomplish
 - How IT interfaces with customer's/end users to determine their specific service objectives and requirements and IT resource requirements
 - What procedures does IT follow to define, negotiate, document, monitor, report, and control IT resource requirements.
 - How does IT formulate and establish agreed-to service parameters and derive current resource utilizations and future resource requirements
 - How does IT plan for future resource requirements
 - What is the service performance cycle, how is it reported on and tracked, and how is it inputted to the capacity management process
 - How does Capacity Management interface with hardware and software technology planning, financial planning, and budget functions
- 6) Develop a list that includes prioritized tactical recommendations for capacity management in areas of IT Infrastructure and the processes that support it. This list will include but not be limited to:
 - Requirements for the design of business unit driver profiles that link IT resource consumption to business requirements
 - Analysis of customer-specific performance level objectives and resource consumption
 - Requirements for creating or modifying customer performance reports to provide input to the capacity management process

- Requirements for creating or modifying business unit profile projections based on customer business plans
 - The process of conducting a capacity and performance reviews between IT and its customers/end-users that track projected resource requirements to current resource consumptions and make any appropriate modifications
 - Develop any customer specific capacity and performance process improvements
- 7) Develop a solution model that focuses on strategic IT infrastructure and processes based on an alignment with tactical recommendations, ITSM requirements, and strategic organizational goals.
 - 8) Assess the organization training requirements for capacity management areas.
 - 9) Develop a training plan for the organization team.
 - 10) Develop an analysis report and associated customer management presentation that includes prioritized tactical recommendations for technology infrastructure and the ITSM processes that support it. These processes will be customer unique best practices for capacity management.
 - 11) Develop an outline for recommended strategic IT infrastructure plan that includes “next steps” to meet the organization’s full ITSM requirements. This includes a size and scope for the effort and anticipated deliverables.

Deliverables

- 1) A report documenting the service level management analysis findings within the customer’s IT Infrastructure at an appropriately high level that includes:
 - The organization’s current capacity management process
 - Current identified and documented IT resource utilization collection and reporting process
 - Current IT capacity management requirements and objectives identified and documented
 - Business unit driver profiles based on customer/end user requirements
 - IT resource consumption model design or enhancement requirements based on business unit drivers
 - The organization’s requirements and expectations for a desired future state
 - A gap analysis of the current state and the desired future state
 - The alternatives for achieving the desired state

- A list of tactical recommendations, in customer specified priority order, for the steps to position the current state of the IT infrastructure to meet strategic ITSM requirements. This will encompass the perspectives of people, process, technology, organization, and integration
- 2) An initial IT infrastructure strategic plan for capacity management to achieve the desired state that encompasses the perspectives of people, process, technology, organization, and integration
- 3) A senior management level presentation summarizing findings, expectations, recommendations, and future ITSM direction.