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IT Service  
Management  
Forum

**Pebble in the Pond**

**itSMF Texas Expo**

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# ***Designing a Process Pebble in the Pond Approach***

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# *Agenda*

- **Goals**
- **Environment**
- **Process Governance**
- **Constraints**
- **Our Approach**
- **Activities**
- **Lessons Learned**
- **Q&A**

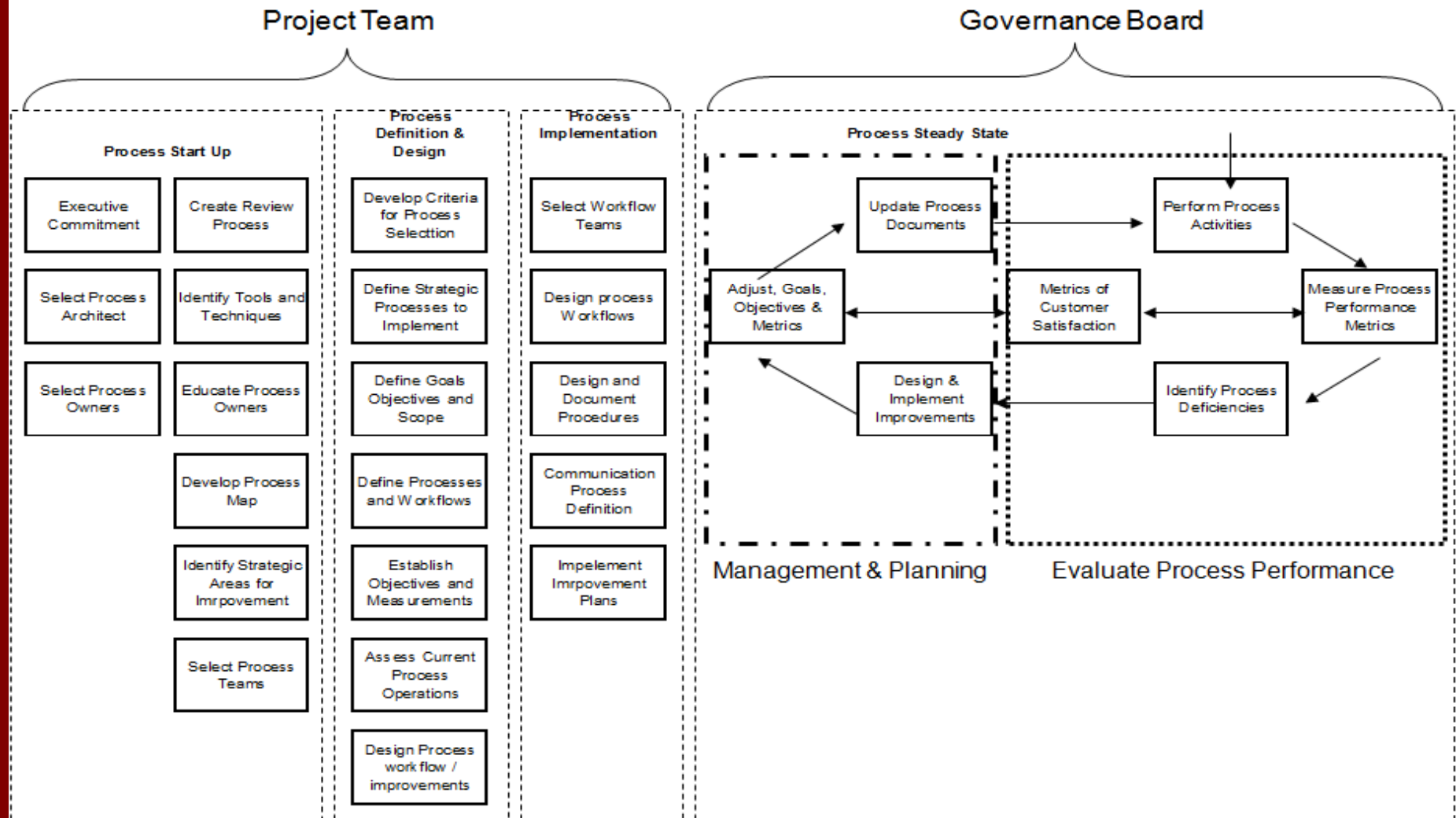
# Goals

- Achieve Operational Excellence and improve Business Service Management
- Optimizing controls and process flows
- Design processes to cut across silos and to be used consistently
- Final solution requires People, Processes, Technology and Metrics

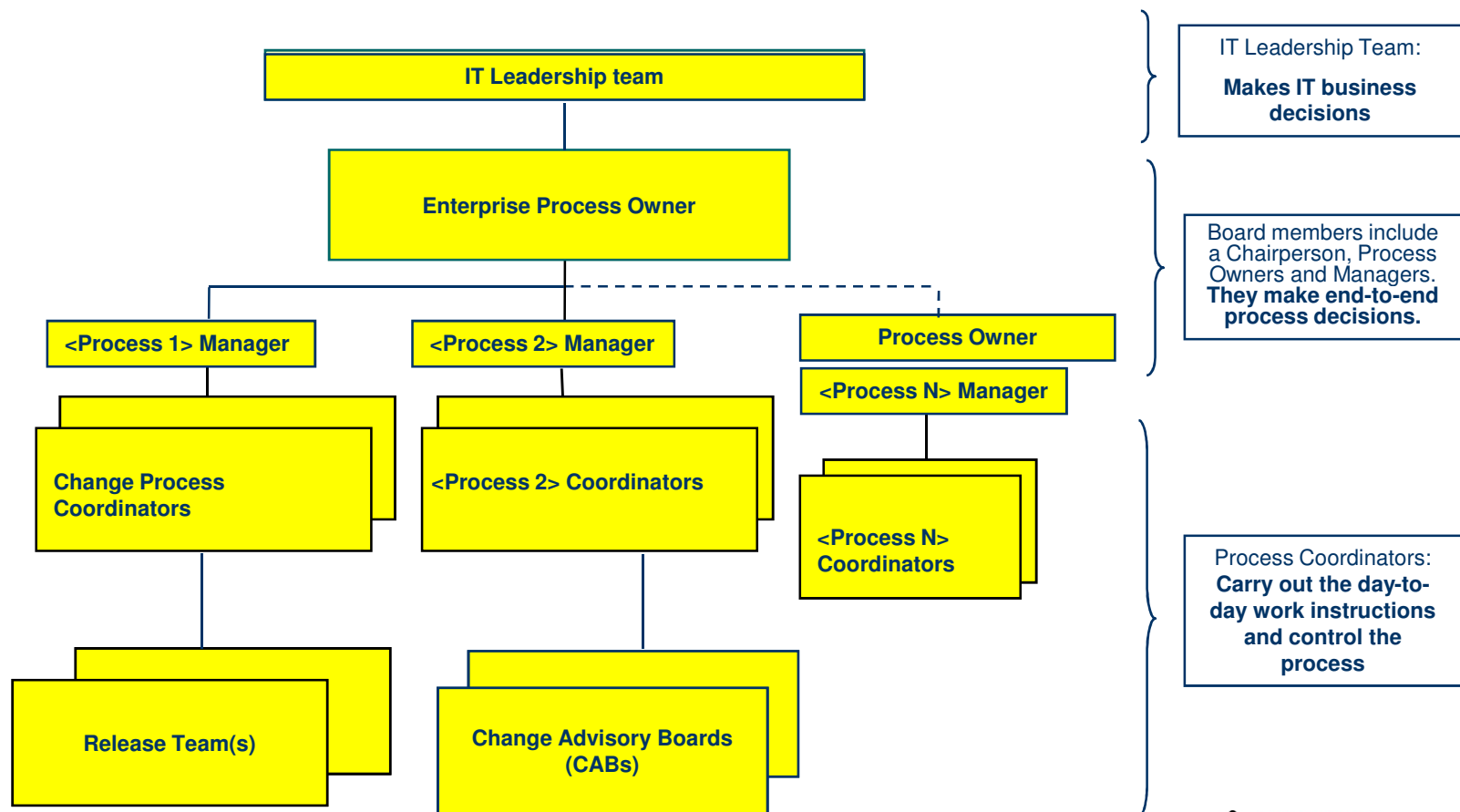
# Environment

- Original business chose to outsource most IT functions
- Merged with a joint venture that continued to provide services with internal staff
- Process integration slow to be adopted
- Business expansion required more operational efficiency
- Process Governance, not defined
  - No process owners
  - No metrics or reporting
  - No accountability for process improvements

# Process Flow for the Governance Board



# Process Governance Structure Framework



# Constraints (Identification and classification):

- Conflicting service delivery approaches
  - Vendor best practices
  - Internal processes
  - Limited integration and not efficient
- Implementation of ITSM
  - Full versus partial
  - All at once versus phased roll out
  - How Change Management impacts Application Development Projects
- Sustainability
  - Process Definitions
  - Process Governance
  - Training
  - Communication

# Our Approach

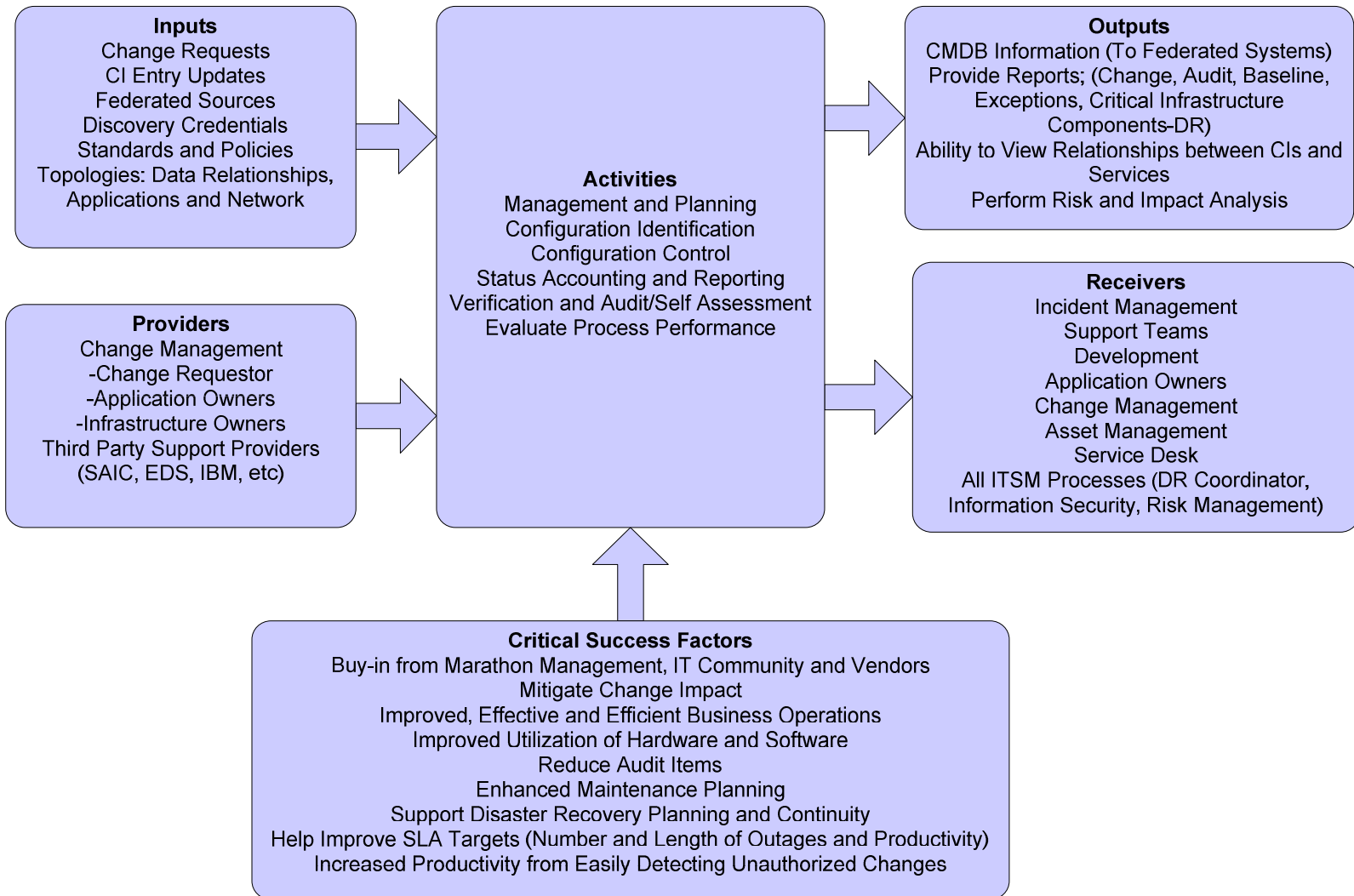
- Select a starting point
  - Which processes
- GAP Analysis and short term strategy
- Evaluate the alternatives to get started
  - Big Bang - Implementation of all ITSM processes; get a vendor/partner and get started
  - Teach them and they will come; using training to gain buy and implementation
  - Pebble in the Pond; start with a small group (of processes) and people
- Agreed on the Pebble in the Pond approach

# How we did it

- Project Management
  - Process, specification and implementation
  - Technology enablement
- Facilitation
  - Mine knowledge capital
  - Effective use of time
- Core team of decision makers
  - Staff, outsourced partners
- Extended team of experts
  - Subject matter experts
- Sponsor's endorsement
  - Executive buy in
- Organizational review for input and acceptance
  - User and business community communication

# Activities

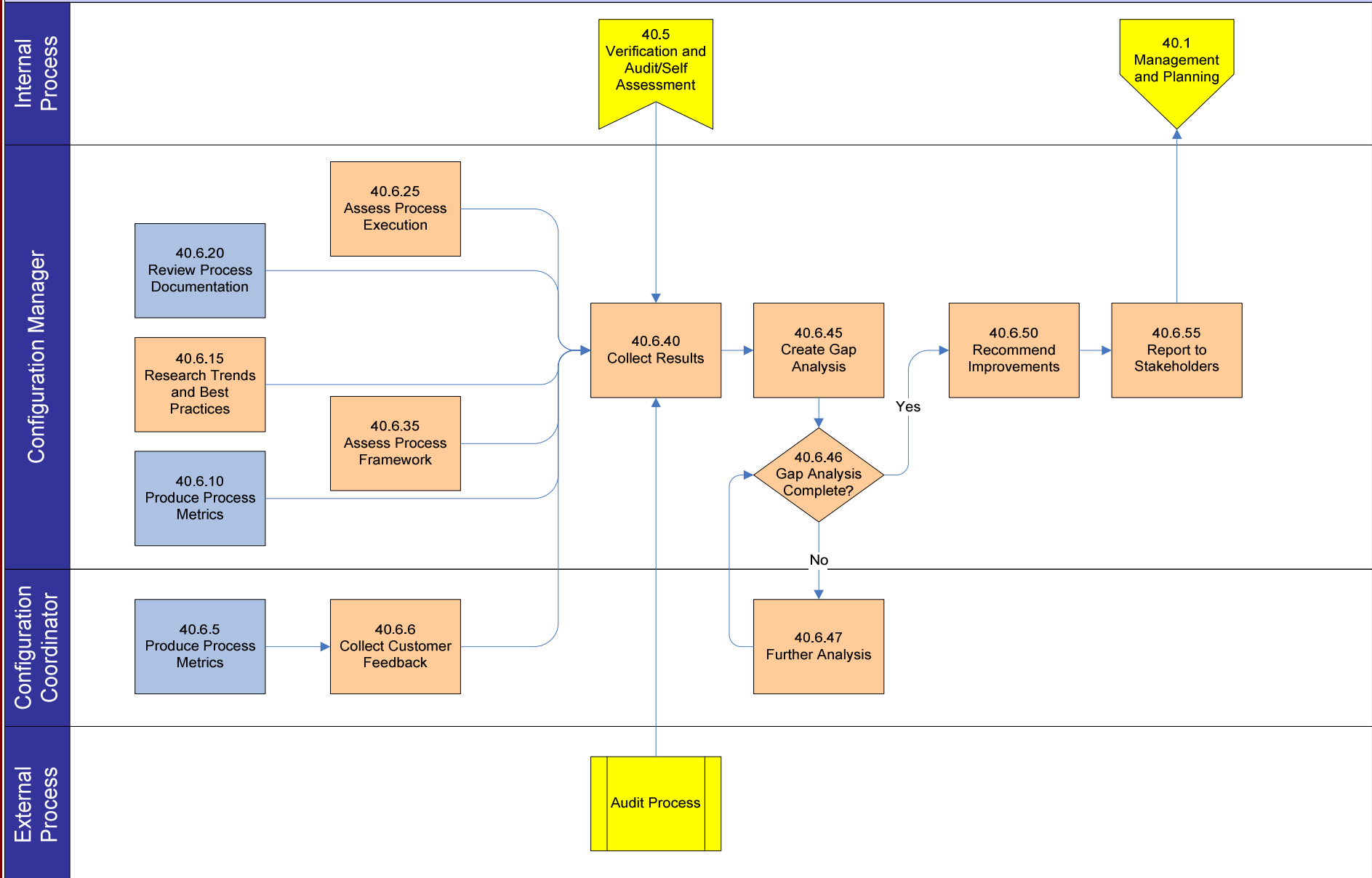
- Workshops
  - Using best practice model
  - Aligned with the organization:
    - Scope
    - Goals
    - Benefits
    - Critical Success Factors and Key Performance Indicators
    - Logical Flow with inputs and outputs, receivers and providers
    - Physical Flow
    - Process roles, responsibilities, skills and organizational position
    - RACI matrix
    - Process Governance
      - Management and Planning and Process Performance Evaluation
- Process integration workshop



# Configuration Management

## 40.6 Evaluate Process Performance

PG40 - Physical Flow Config V2\_2.vsd



| RACI Table Marathon Configuration Management   | Process Owner | Process Manager | Process Coordinator | CI Owner |
|--|---------------|-----------------|---------------------|----------|
| Develop/Update Process Strategy and Roadmap  | A, R          | C, I            | C, I                |          |
| Report Quarterly process performance to CIO (including strategic action plans)                         | A, R          | C, I            | C, I                |          |
| Report Monthly process performance to Governance Board (including tactical and strategic action plans) | A, C, I       | R               | C, I                |          |
| Weekly operational process reviews   |               | A, C, I         | R                   |          |
| Create/Review Metrics and gather input   | I             | A, R            | C, I                |          |
| Provide input and Requirements to management & Planning  |               | C, I            | A, R                | C, I     |
| Determine Requirements for processes   |               | A, R            | C, I                |          |
| Create/Review process model  |               | A, R            | C, I                |          |
| Update the process   | A, C, I       | R               | R, C, I             |          |
| Provide Training, Awareness and communication  | R, I          | A, R            | R, C, I             | I        |
| Review process documentation   |               | A, R            | R, C, I             |          |
| Research Trends and Best Practices   |               | A, R            | C, I                |          |
| Produce process metrics for Marathon   |               | A, R            | C, I                |          |
| Produce process metrics by function/group  |               | C, I            | A, R                | I        |
| Collect customer feedback  |               | I               | A, R                | C, I     |
| Collect/combine process operational results, trends, issues  | C, I          | A, R            | C, I                |          |
| Perform Gap analysis   |               | A, R            | R, C, I             |          |
| Recommend improvements to the process  | C, I          | A, R            | C, I                |          |
| Take action to implement improvements  | R, C, I       | A, R            | R, C, I             |          |
| Report to stakeholders   | C, I          | A, R            | C, I                | I        |
| Identify CI types  |               | I               | C                   | A, R     |
| Assess impact of CI type on CMDB data model  |               | I, C            | A, R                | C, R     |
| Create CI type   | I             | A, C            | R                   | C, I     |
| Update CI type (key and non-key attributes)  |               | A, C            | R                   | C, I     |
| Create RFC to request new CI type or key attribute update  |               | A, R, C         | C, R                | C, I     |
| Receive request for new CI or update   |               |                 | A, C, I             | R, C     |

# Lessons Learned

- Managing resistance to change
  - Education, executive sponsorship and user input
- Ensuring cross functional participation
  - Global representatives from technical and functional roles
- Each ripple in the pond provides more input and education
  - Broader reach
- Moving from non-negotiable into negotiable
  - Removing constraints through contribution and ownership
- Standing firm on industry best practice model
  - Leveraging tested and proven models
- Implementing process governance to ensure CSI
  - Through roles and metrics
  - Setting of executive expectations

# Questions and Answers

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