



ITIL Lite: Service Management for SMBs

ITSM and ITIL have long been the gold standard among large enterprises when it comes to formal IT service management processes. But what about small to mid-sized businesses?





the birth of ITSM and ITIL

In the late 1980s, the personal computing scene was taking off: companies in every sector were buying up PCs and starting to network them. Organizations recognized the tremendous efficiency gains that computers and networks could bring to any industry and were rapidly acquiring them. However, while the IT sector was expanding rapidly, IT service delivery standards were not keeping pace.

During this time, the UK government realized that its internal agencies and private sector contractors were rapidly developing their own IT management practices. The result was chaos — as burgeoning IT organizations in the public and private sectors tackled their problems in different ways, collaboration between these groups was nearly impossible.

This situation was the catalyst for the UK government to develop a singular approach to standardizing IT services. The end result was a program called IT Service Management (ITSM) and, within that program, a specific subset of best practices evolved that are now referred to as ITIL: Information Technology Infrastructure Library.

If ITSM is the strategic and conceptual layer of IT management philosophy, then ITIL is the in-the-trenches process-driven tactical layer. ITIL addresses the “How?” of IT service management via a series of categorical practices:

- **Service Strategy:** Meeting the company’s objectives and the needs of its customers;
- **Service Design:** Converting the Service Strategy into an objectives-based business plan;
- **Service Transition:** Introducing new services into an existing infrastructure;
- **Service Operation:** Managing services in supported environments; and,
- **Continual Service Improvement:** Incremental improvements to existing services.

SMBs left out in the cold

Like any government-created initiative, however, ITSM and ITIL rapidly swelled in size in an attempt to address every conceivable process-oriented scenario. Over time, ITIL became the de-facto methodology for large enterprises, primarily because such organizations require the comprehensive standardized workflows that ITIL offers. In short, they have the need and the resources to make full ITIL compliance a reality.

Small and Mid-sized Businesses (SMBs), however, have been left out in the cold when it comes to ITIL implementation. For example, small businesses may have little use for IT Service Continuity Management (a process included within the Service Design category). This section of ITIL explains the best practices needed to ensure that IT services can recover and continue operations after incidents and interruptions. Such processes are fine for large enterprises who can afford significant infrastructure investments but, for SMBs whose IT backbone runs in the Cloud, Service Continuity Management is simply not relevant.

Overall, ITSM and ITIL practices have much value; in fact, there are plenty of ITIL best practices that are highly relevant to SMBs, such as incident management and change management. The best approach is to identify areas within ITIL that are relevant to the small and mid-sized business sector



and then find ways to apply them in a meaningful manner. With that in mind, Crow Canyon has developed a framework for SMB service delivery that includes important and relevant elements of ITSM. We call this “ITIL Lite.”

SMBs: the current reality

Generally-speaking, most small and mid-sized businesses employ a one-day-at-a-time philosophy. A token amount of effort may be spent on addressing potential process-centric problems but, on the whole, problems are dealt with as they appear. The reason is that resources are limited and, in an effort to appease customers with specific requirements, those resources are usually spent on customizations, bespoke solutions, and industry-specific configurations. This requires a focus on in-house development, informal processes, employees who wear many hats, and a reactive fire-fighting approach to IT service support.

This approach will get the job done in the short to mid-term, but long-term growth in a competitive environment will be a continual challenge. Being constantly behind the eight ball and playing catch-up are symptoms of process inefficiency — the organization is just too busy juggling problems and the IT team has no time to strategically plan for the future. Ultimately, service to employees and customers suffers as the problems mount and remain unresolved; often, an ad-hoc, “band-aid” approach is taken; this may solve the immediate crisis, but does not address long-term solutions. Many SMBs fall into this trap, despite their best intentions to be “different from the rest.”

mapping existing processes to ITIL

Whether SMBs know it or not, they most likely already practice several core ITIL processes, though the similarity may be in name only. Communication, whether external or internal, is typically initiated by an end-user who is reporting an incident. The handling of incidents usually involves the following three processes:

- **Incident Management (Service Operation):** The process of restoring normal operations as quickly as possible. This is often facilitated by a ticket tracking system that enables Support and Operations to track, route, and assign incoming user-created tickets. A ticket is closed when the incident has been resolved;
- **Problem Management (Service Operation):** Problem Management is the analysis of the root causes of incidents, with the goal being the prevention of their recurrence. Problem Management requires robust reporting and analytics capabilities that are tightly integrated with the Incident Management process;
- **Change Management (Service Transition):** In this context, Change Management is the determination of whether or not a reported issue affects infrastructure resources and, if so, what changes need to be made to address the issue on a wider scale. This component includes a variety of different processes, such as configuration management, asset management, and service desk. Change Management requires detailed access to company assets along with a communications platform for handling change requests.

An organization’s internal methods and formal ITIL processes may look the same on the surface, but the true difference lies in their implementation. Traditional IT companies rely on manual methods,





such as forwarding support e-mails, opening & closing tickets, and using reporting tools that do not natively integrate with an incident management platform. For many companies, a communications platform consists of an e-mail client with a shared contact list. ITIL methods and the ITSM philosophy, however, are quite different.

key ideas behind ITSM and ITIL

ITSM (the concept layer) and ITIL (the implementation layer) are designed to help organizations align their IT services with their business needs. Key concepts include:

- **Increasing Efficiency:** Like the assembly line of old, the driving mission of ITSM is to increase efficiency. Management should move away from focusing on technology and, instead, focus on efficient processes. Finding innovative and unique approaches are key to breaking out of outdated and slow methods;
- **Focusing on Process:** ITSM places a spotlight on how things are done, hence the creation of ITIL. ITIL best practices are simply extensions of the ITSM process-centric philosophy. Informal methods focused on specific technologies tend to slow down progress and create bottlenecks. ITSM takes the focus away from technology and places it squarely on finding the best way to get results — find a specific process that works for your company and then formalize it.
- **Emphasis on Prevention:** Traditional IT environments tend to deal with issues as they come up, believing that resources spent on potential problems are wasted — this approach works fine when nothing goes wrong. The reality of the IT world, however, is obviously much different. The focus needs to be on proactive processes that prevent problems before they occur.

ITIL Lite: meaningful process formalization

ITIL is a monster that plays well in large enterprises, but cannot be constrained in a small to mid-sized business. It's just too big, hence ITIL Lite. ITIL Lite is a framework that features the three components mentioned above (incident management, problem management, and change management) and implements them in a meaningful, SMB-friendly manner:

- **Relevancy:** Incident Management, Problem Management, and Change Management form the backbone of ITIL Lite because they are highly relevant to the common, everyday scenarios faced by SMBs in the IT sector. For the majority of SMBs, there is simply no need or relevancy for most ITIL processes; after all, when is the last time your small business required a formal ICT Infrastructure Management process?
- **Software Integration:** ITIL Lite relies on the integration of software that is collaborative, tightly integrated, and leverages technologies already used by SMBs. In the next section, *implementing ITIL Lite*, we'll discuss how Crow Canyon solutions integrate with the ITIL Lite approach;
- **Intelligent Formalization:** SMBs often rely on informal processes, such as unrecorded change requests, ad-hoc projects, and in-house tech specialists (silos of knowledge) to handle day-to-day incidents. The weakness in this approach is that when something goes wrong in the incident resolution chain, then the informal process becomes a bottleneck. ITIL Lite processes are formal approaches designed to withstand the wear-and-tear of incident resolution;



- **Automation:** With the right software platform, ITIL Lite processes should be as automated as possible. This means that tickets are automatically tracked, routed, and saved for subsequent analysis (i.e., problem management) and for potential updating/patching (i.e., change management). The workflow should be aimed at removing all manual elements.

implementing ITIL Lite

ITIL Lite implementation can be facilitated by the use of software solutions that support each component's overall purpose. Crow Canyon's software platforms were designed with ITIL in mind; in fact, all of our Microsoft SharePoint-integrated solutions include ITSM and ITIL-friendly functionality.

Incident Management

In an ITIL Lite framework, Incident Management should rely heavily on automated workflows that are configurable, flexible, and leverage your existing infrastructure. Our *IT Help Desk* system, like all of our solutions, is tightly integrated with Microsoft SharePoint — the most popular communication and collaboration platform in business today. It is designed to help your teams restore normal operations for your customers as quickly as possible by providing them with the communications tools they need to engage with your customers effectively.

The system supports incident reports from multiple sources, such as Outlook, SharePoint, e-mail, and even telephone. A key feature of the *IT Help Desk* is automation: every incident is transformed into a ticket, which can then be automatically routed to pre-configured recipients. Tickets are tracked throughout the incident resolution process and can also be routed for Management approval when needed.

Problem Management

All of our solutions include robust reporting and analytics capabilities, effectively enabling you to monitor the progress of tickets as they transition between statuses. Our reporting and analytics functionality tracks and records all data-points as they pass through configurable workflows. Comprehensive filters enable you to view data that is relevant to your specific business needs, with dashboard results being visually conveyed via charts and graphs. In terms of Problem Management, our reporting capabilities enable you to discover the root causes of your incidents, discern potential issues before they escalate, and also monitor the efficiency of your service management processes across business departments. In addition, our reporting and analytics provides invaluable feedback when implementing ITIL-based Continual Service Improvement initiatives (e.g., *Is the Support Team performing optimally?*, *Are service goals being met?*, *What bottlenecks are hampering efficiency?*).

Change Management

Our *Asset Management* system provides a comprehensive view of exactly what is going on with your assets, a feature that is critical when applying Change Management processes to your organization. If an incident's root cause affects the organization's service capabilities, then attention shifts to making relevant changes to your infrastructure. In order to do this effectively, you need immediate access to specific real-time asset information (e.g., *Who is currently using an asset?*, *What is its usage history?*, *When was it last updated (software) or serviced (hardware)?*, *What is its serial/license number?*, etc.). Our *Asset Management* system supports network discovery tools,



enabling your organization to automatically add new resources to your records without manual input. In addition, our *Asset Management* and *IT Help Desk* systems are 100% compatible and work seamlessly together within Microsoft SharePoint. This level of integration enables you to create a change request communications platform that can associate incident report tickets with specific assets.

conclusion

ITIL Lite can provide many of the benefits of a full-fledged ITIL implementation without the burdensome overhead of the full ITIL standards. The goal is relevant and appropriate scaling of IT Service Management principles to the SMB reality. With an ITIL Lite approach, SMBs can reap the advantages and efficiencies of an organized, effective, proactive service delivery infrastructure without the expense and “overkill” of the complete set of ITIL standards.





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