



Cisco on Cisco Best Practice

IT as a Services Organization

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Introduction

IT as a Services Organization (ITaaS) is a business model for running IT that delivers value as defined by IT's clients and customers in a cost effective manner. Clients and customers will realize this value in numerous ways including improved business capabilities, faster time to receive capabilities, and lower costs.

To enable good decision making about value, IT must provide transparency to the cost of IT. Cisco IT provides the business with a decision-making advantage by leveraging data and business intelligence.

IT must be able to enter into a stronger partnership with the business to ensure that new business models can be delivered faster, better, and cheaper. Operating as a service organization supports reuse of existing services and components, allowing IT to deliver scalable capabilities faster, and ultimately enabling Cisco's agility and time to market (speed). Agility is a critical capability as Cisco enters new markets and technologies.

Simply stated, ITaaS is a business model in which IT resources, such as storage, computing power, and email, are accessed (delivered) as services cost effectively.

ITaaS is based on three tenets:

- **Client and customer centric.** The focus is solely on the clients' or customers' needs and their vision.
- **Business value driven.** ITaaS focuses on identifying, quantifying, and billing for the value that the business gets from every IT investment, thus maximizing those investments.
- **Cost effective.** Reducing IT costs without compromising quality of services and reinvesting savings are the main goals of the ITaaS model. Achieving those goals is possible through use of technologies based on alternative pricing models such as pay per use or subscription fees. Virtualization and cloud computing are two technology examples.

ITaaS organization alignment brings business and IT much closer together, enabling the business to understand what it is paying for, and to fine tune IT needs and demands for new IT services based on the cost to the company. This transparency also enables a closer alignment of IT expenditures to business goals, and improves cost efficiency. Resource efficiency is also realized because architectural components in ITaaS are reusable, which increases scalability, and drives simplicity and economies of scale. Robust architecture supports many types of applications, but at the same time is specific enough to meet individual needs.

Within Cisco IT, the transition to a services organization depends on progressive cultural and process change. It is not a single implementation. The transition will consist of improvements in Cisco IT's services maturity around a clearly defined strategy and roadmap.

The Cisco IT organization will transform across technology, process, and culture.

In terms of **technology** (architecture), virtualization, collaboration, and borderless networks (includes routing and switching, security, and mobility) represent major market opportunities for Cisco. To succeed, Cisco IT must unify the business and technology architectures, and adopt a services model that will enable IT to develop the required close partnership with the business to deliver strategic, yet pragmatic, architectures.

From a **process** perspective, Cisco IT will create and adopt new and enhanced processes that conform to the IT Operating Model. For example, IT will develop new processes to define, cost, and manage its services, and these processes will integrate with existing processes established within the operating model. Also, having the ability to determine the total cost of ownership (TCO) of IT services will enable much more effective investment planning, and allow IT to drive out costs of running the business and reinvest in capabilities and growth.

The **culture** transformation involves a significant amount of change in how work gets done. IT employees are asked to organize and discuss the work of IT differently, and to have different conversations with peers, managers, clients, and customers. IT employees need to understand and evolve their roles to succeed in a services model versus a functional model. Overall, the IT organization must align its work to a services portfolio and undertake various refinements to its processes, roles, and skill levels to meet ITaaS goals.

This transformation requires organizational change management to succeed. A critical part of organizational change management is clear definition and communication of service roles within Cisco IT.

IT as a Services Organization Roles

A high-performing organization has clearly defined and well understood roles for its employees. Key to Cisco IT's transition to ITaaS was the creation and implementation of new services-oriented roles. These are called service roles.

The functions of the service roles are to:

- Ensure a client-oriented focus and to answer the need for role-level consistency across IT in managing IT services
- Set expectations for IT employees' priorities and performance in a services-oriented organization
- Establish employee role responsibilities in terms of services
- Support strategic relationships between IT and the business
- Enable critical value conversations for IT

Cisco's service roles were created by a cross-IT working team formed at the direction of IT senior staff. The service roles team was drawn from a broad spectrum of individuals who were already working on developing related ideas. The team examined existing content, documents, and practices contributed by the members. After intense discussion of the existing content, the team aligned on seven IT service roles and their definitions.

Service Roles Definitions

Following are Cisco IT's service role definitions and descriptions of the associated responsibilities. Also included are principles and guidelines for applying these roles that IT employees in other organizations can use in enabling successful ITaaS adoption.

For every service, specific individuals must be assigned to the Service Executive and Service Owner roles and have assigned responsibility for System/Technology Architecture roles. For the other roles, a single role could be assigned to multiple individuals or an individual could be responsible for several roles.

Service Executive

Responsible for the executive-level business relationship. The Service Executive determines strategy for a set of related services that enable a business function(s), and is a trusted advisor to business counterparts. This role also evangelizes IT's overall service capabilities, facilitates top-level budget and resource allocations, and is accountable for overall operational excellence and client experience for service. The Service Executive must be a member of IT senior staff or the equivalent, e.g., a vice president reporting to a senior vice president. The assignment of Service Executive is subject to approval by the Service Management Steering Committee.

Service Owner

Responsible for end-to-end service delivery including all service offerings, in particular the value that the service delivers. The Service Owner deals with strategy and portfolio management and the service roadmap; and prioritizes initiatives, budgets, negotiations with partners and vendors, and authorization of the release of new capabilities. This role also drives service maturity and service metrics, and ensures service-appropriate roles have been identified, filled, and published. The Service Owner is responsible for overall operational excellence and client experience for service.

Service Lifecycle Management

Optimizes a service across all offerings and ensures consistent service management across all service lifecycle stages and offerings. This role focuses on achieving service targets and is accountable to the Service Owner.

Service Offering Management

Responsible for driving the cost, quality, adoption, and use/reuse of one or more specific service offerings that clients acquire or to which they subscribe. Service Offering Management drives overall service offering cost optimization and continuous improvements, manages the service-level agreement (SLA) with client, and showcases service offerings internally and with customers and the industry. This role is accountable to the Service Owner.

Business Relationship Management

Responsible for the client relationship with respect to the set of IT services consumed by the client. This role functions as account manager: understands needs, aggregates requirements across client base, represents requirements to the service owner(s), and partners closely with the Service Owner to ensure delivery.

System/Technology Architecture

Responsible for end-to-end architecture for the service, incorporating the business architecture and technical architecture requirements. This role creates the architectural roadmap for the service in alignment with service strategy, and is responsible for systemic qualities (e.g., scalability, agility, and availability).

Service Roadmap Management

Accountable for overall success of delivering the service category roadmap. Service Roadmap Management creates and owns programs and projects across services in the category, and develops a plan for delivering program and project goals and objectives and an overall schedule of projects that align with IT and business goals. This role is responsible for the design, build, test, and implementation of service offering changes.

Service Roles Principles

Clearly defined IT services roles are required to maintain consistency across IT. It is expected that no additional service-related roles be defined or implemented in the IT organization without approval at the IT senior leadership level.

- Specific individuals **must** be assigned to the Service Executive, Service Owner, and System/Technology Architecture roles for every service. Depending on the services an organization delivers, the applicability of the other roles will vary. Multiple roles may be assigned to the same individual, or one individual may be assigned a given role for multiple services.
- The Service Owner is responsible for ensuring that the proper role assignments are made. The Service Owner is accountable for any responsibilities not assigned to a specific person(s).

- The service roles are intended to define responsibilities for existing IT employees, not to generate the need for additional headcount. Implementation and adoption of the roles in IT groups will be realized through organizational and employee development and optimization.
- IT service roles are *roles* and not job profiles. The service roles described in this document are meant to augment, not replace, the service manager and service lead job profiles, as well as enable the integration of service-related responsibilities into other existing jobs in IT.

Service Roles Guidelines

The following guidelines pertain to various aspects of the service roles and their relationship to other documents, structures, and concepts.

Relationship to IT job profiles. As IT becomes a services organization, all employees will need to adopt a services mindset and understand what that means to their overall responsibilities, regardless of job title. Some employees will take on the direct service-related responsibilities of service roles. Members of IT senior staff at the vice president level will take on the role of Service Executive and be accountable for all services within the service categories they own. Depending on the services they support, IT directors, IT managers, or service managers can be service owners, and thus be responsible for entire services including the overall performance, service lifecycles, and roadmaps. Except for the Service Executive role, anyone in IT can be assigned to any of the roles. (See the Roles/Titles matrix below for more information.)

For IT employees not assigned a specific service role, responsibilities will be broadened to demonstrate an understanding of the services they impact and support. For example, IT project and program managers will still run projects and programs, but with a more comprehensive view of the entire service and the long-term operational impact. Technical roles will also have a broader view of the service being impacted and work towards success of the overall service.

Leverage the service manager and service lead profiles. Predating the rollout of these service roles, Cisco human resources and IT created two service job profiles still in place today: service manager and service lead. The comprehensive responsibilities, outputs, metrics, and skills defined in these profiles can augment the service role information to present the entire range of staffing possibilities for organizational leaders to consider. The information can help to effectively integrate service roles with existing IT positions (e.g., an IT manager taking on the role of Service Owner), as well as develop full-time service managers and service leads. Employees whose responsibilities are completely or nearly completely related to managing services should be considered for the service manager or service lead job titles.

Service roles in the theaters. Service roles are intended to complement, not replace, existing theater roles and IT relationships. For example:






- Business Relationship Management would work closely with theater relationship executives to ensure that the existing local relationships and client needs are leveraged and included in the service development.
- Service Roadmap Management would work closely with in-theater IT teams to ensure that theater stakeholder requirements are built into the global roadmaps.
- The theater IT teams would work with Service Roadmap Management to ensure that global service activities are supported in theater.

- The Service Owner would work with theater teams to ensure that theater needs are met, escalations are managed, and regional issues are built into the overall service management approach.

The Service Lifecycle and the IT Operation Model

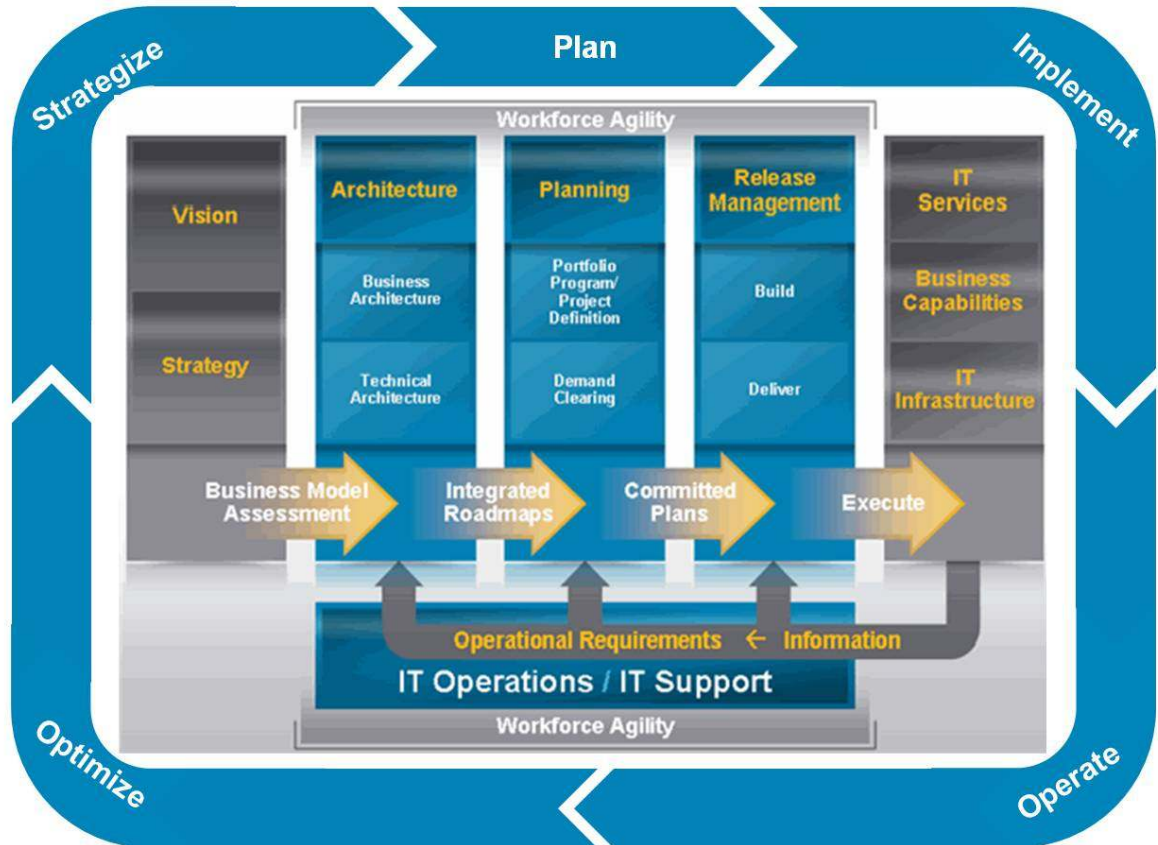
The service lifecycle is a set of activities that describe how a service is managed. The service lifecycle originated from industry standards that were later adapted to ensure relevance and effectiveness for Cisco IT. The lifecycle comprises five stages: strategize, plan, implement, operate, and optimize (see Figure 1).

A. The Service Lifecycle Stages

| Stage | Description |
|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Strategize | Align with business strategy and client demand to identify needed service changes, connect to value creation, and leverage the IT portfolio. Then prioritize service roadmaps. |
|  Plan | Translate service roadmaps and requirements into project and implementation plans and share with the business. Architect and design or reuse service solutions in response to service requirements. |
|  Implement | Review service architecture with the business. Build, test, and deliver systems and solutions. Prepare business expectations, culture, and processes for service deployments and changes. |
|  Operate | Support growth in service adoption and utilization by clients, reviewing value to validate alignment and identify course corrections. Handle service risk, events, issues, and provider relationships. |
|  Optimize | Benchmark, measure, and review service performance to identify improvement opportunities to work into service roadmap. Aggregate the service value results into the IT portfolio. |

The service lifecycle is infused in the Cisco IT Operating Model (see Figure 2).

B. The Service Lifecycle Stages



Services Roles RACI

A useful way to understand the service roles and their functions is to relate them to activities in the service lifecycle. Table 1 shows these relationships using RACI charting to describe the functions and decision making authority for each service role. In RACI:

- R = responsible
- A = accountable
- C = consulted
- I = Informed

Table 1. RACI Matrix: Service Lifecycle Activities and IT Service Roles

| Service Lifecycle Stages | Service Activities | Service Team Roles | | | | | | | | | | | |
|--------------------------|-----------------------------------------------------------------|--------------------|---------------|-----------------------|------------------------|-----------------------|----------------------------------|----------------------|--------|----------|-------------|------------------------|-------------------------|
| | | Service Executive | Service Owner | Bus Relationship Mgmt | Service Lifecycle Mgmt | Service Offering Mgmt | System / Technology Architecture | Service Roadmap Mgmt | Client | Analysis | Engineering | Project / Program Mgmt | Support / Supplier Mgmt |
| Strategize | Critical Value Conversation - Strategy Alignment | AR | R | R | C | C | C | R | R | C | | I | I |
| | Identify changes in the client needs | C | C | AR | R | | | | R | R | | | C |
| | Evaluate service demand | | A | | R | C | I | | C | R | | | R |
| | Evaluate service and recommend changes to IT Service Portfolio | | A | R | R | C | C | | C | C | C | C | C |
| | Approve change to IT Service Portfolio | AR | C | I | C | I | C | | C | I | | | I |
| | Create, deliver, coordinate Service Roadmap | | AR | C | R | | C | R | C | C | C | | C |
| | Approve change to Service Roadmap | | R | C | C | | C | AR | I | I | | | I |
| Plan | Critical Value Conversation - Portfolio Planning | A | R | R | R | R | C | | R | I | | C | C |
| | Identify and document service requirements | | | R | AR | R | | | C | R | R | C | R |
| | Architect new service | | | | C | C | AR | C | | C | R | | C |
| | Identify and document architecture & technology roadmap | | C | I | C | C | AR | C | | C | R | | C |
| | Approve service proposal, requirements, and design package | C | AR | I | R | C | C | | C | I | I | I | C |
| | Approve change to project portfolio | | AR | | C | I | C | | I | I | | C | I |
| | Develop service implementation plan | | I | C | AR | C | C | R | C | | C | R | C |
| Implement | Critical Value Conversation - Architectural Reviews | I | I | R | A | R | R | | C | C | C | I | C |
| | Submit service change request | | | R | A | R | C | | | I | C | C | C |
| | Authorize service change / release | I | A | R | R | C | C | | C | C | | C | C |
| | Update existing architecture | | | | I | C | AR | | | | R | | |
| | Design service change and reuse | | | | R | AR | I | | C | R | R | I | R |
| | Build, test and implement service change / release | | | | R | R | I | R | C | C | R | AR | R |
| | Prepare clients for service deployment (training, chg mgmt, cor | I | C | R | C | R | I | | R | C | C | AR | R |
| | Prepare for transition to service operations and support | | | | R | AR | | | | R | R | R | R |
| Operate | Update and maintain the service portfolio records | | A | | R | R | C | | | C | R | | R |
| | Support ongoing service operations | | | | C | R | R | | C | R | R | | AR |
| | Manage service events, incidents and problems | | I | | C | AR | R | | C | C | R | | R |
| | Manage vendor relationships | I | C | C | R | AR | C | | I | C | C | | R |
| | Monitor and report service performance | | I | C | C | R | | | C | AR | R | C | R |
| | Review service performance with client | I | C | AR | C | C | | | R | C | C | | C |
| | Critical Value Conversation - Quarterly Value Discussion | I | I | R | AR | R | I | | R | C | C | | C |
| Optimize | Identify requirements for service improvements | | C | R | AR | R | R | R | R | R | R | C | R |
| | Approve service improvements | I | AR | I | R | I | C | | I | I | I | | I |
| | Update the service roadmap | | C | | R | C | R | AR | | C | C | | C |
| | Benchmark service performance | I | I | C | AR | R | C | | C | R | C | | C |
| | Manage internal feedback to the IT service team | I | AR | C | R | I | I | I | | I | I | I | C |
| | Manage and report service budget | | R | C | AR | C | | | C | C | | | C |
| | Critical Value Conversation - Aggregate Conversation | AR | R | R | R | C | I | | C | I | | | C |

Services Roles Matrices

The matrices in this section provide further detail about the scope of each service role. The first matrix, Roles/Titles, shows job profiles that are commonly associated with the service roles. The following matrices show a breakdown of responsibilities and activities for each of the roles in each of the five service lifecycle stages (Strategize, Plan, Implement, Operate, and Optimize).. Finally, there is a matrix for the Client and Stakeholder Management, which cover all stages.

Roles/Titles

The table below shows the service roles and commonly associated job profile/title. These are guidelines for assigning responsibilities for services across existing IT organizations. Except for the Service Executive role, anyone in IT can be assigned to any of the roles. However, due to their current responsibilities and skills, employees with the job profiles/titles shown below are the most likely candidates to be assigned to specific service roles.

| Role | Service Executive* | Service Owner* | Business Relationship Management | Service Lifecycle Management | Service Offering Management | System/Technology Architecture* | Service Roadmap Management |
|------------------------------------|------------------------|-----------------------------------------------------|-----------------------------------------------------|----------------------------------------|----------------------------------------|---------------------------------|-----------------------------------------------------|
| Associated IT Job Profile / Title* | IT Senior Staff Member | Senior Director, Director, Service Manager, Mgr, IT | Senior Director, Director, Service Manager, Mgr, IT | Service Manager, Service Lead, Mgr, IT | Service Manager, Service Lead, Mgr, IT | IT Architect | Senior Director, Director, Service Manager, Mgr, IT |

* All services must have an associated Service Executive and Service Owner and assigned responsibility for System/Technology Architecture. All other responsibilities can be managed with a combination of roles depending on the service.

Service Lifecycle Stage 1: Strategize

| Role | Service Executive | Service Owner | Business Relationship Management |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Strategize</u> | <p>Strategy alignment with Service Executives and the business and clients</p> <p>Approve service strategy</p> <p>Approve changes to service portfolio</p> | <p>Engage clients in strategy translation discussion</p> <p>Evaluate service demand and identify new clients</p> <p>Market and business trends research</p> <p>Develop and manage service strategy and service portfolio recommendations</p> <p>Connect strategic direction to service roadmap</p> <p>Ensure service team aligns to strategy, roadmap, and System/Technology Architecture</p> | <p>Manage relationship with the business and clients and IT</p> <p>Identify changes in client needs</p> <p>Ensure service levels and objectives are identified</p> <p>Recommend service strategy changes</p> <p>Recommend service portfolio changes to close gaps, eliminate redundancy</p> <p>Connect teams across service areas to shared outcomes</p> |

| Role | Service Lifecycle Management | Service Offering Management | System/Technology/Architecture | Service Roadmap Management |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Strategize</u> | <p>Evaluate service demand and identify new clients</p> <p>Identify changes in client usage of services</p> <p>Incorporate service improvement and Optimize opportunities into service strategy</p> <p>Recommend service roadmap changes</p> <p>Recommend changes to service portfolio</p> <p>Process / service research</p> | <p>Drive service reuse</p> <p>Identify leverage-able services to provide comprehensive business solution</p> <p>Identify changes in client usage of services</p> | <p>Market and technology research</p> <p>Align service strategy with strategic optimization and integration needs</p> | <p>Engage clients in roadmap discussion</p> <p>Facilitate service roadmap development</p> <p>Improve quality of value assessments</p> <p>Participate in strategic planning for proposed technologies or solutions</p> <p>Develop overall schedule of projects and programs within the service category</p> |

Service Lifecycle Stage 2: Plan

| Role | Service Executive | Service Owner | Business Relationship Management |
|-------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Plan</u> | <p>Validate portfolio alignment with business and clients</p> <p>Approve service budgets</p> | <p>Validate, define, and manage overall service roadmap</p> <p>Prepare and manage budget (e.g., total cost of ownership)</p> <p>Accountable for service lifecycle definition, role assignments, and fulfillment</p> <p>Plan service strategy integration with IT goals</p> <p>Approve process / service blueprints and architecture</p> <p>Approve change to project portfolio</p> | <p>Validate service roadmap alignment, targets, and entitlement with business and client requirements</p> <p>Define service requirements</p> |

| Role | Service Lifecycle Management | Service Offering Management | System/ Technology/ Architecture | Service Roadmap Management |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Plan</u> | <p>Incorporate detailed requirements into roadmap</p> <p>Identify roadmap impacts</p> <p>Identify and drive service solutions</p> <p>Prepare budget inputs</p> <p>Analyze service data</p> <p>Approve process and service blueprints and architecture</p> <p>Manage service changes, cost optimization, implementation, availability, entitlement</p> | <p>Enable business capabilities through common services</p> <p>Incorporate detailed requirements into roadmap</p> <p>Integrate capability and delivery roadmap across functions</p> <p>Drive overall service offering cost optimization</p> <p>Plan service offering changes</p> | <p>Ensure architecture supports service requirements</p> <p>Architect new service system/ technology</p> <p>Work with Service Owner and service team to develop overall architecture and technology roadmap</p> <p>Provide guidance on portfolio changes and implementation plan</p> | <p>Accountable for overall success of all program and projects within the service roadmap</p> <p>Manage program and project manager activities for programs and projects within the service category</p> <p>Develop plan for delivering goals and objectives for all programs and projects within the service roadmap</p> |

Service Lifecycle Stage 3: Implement

| Role | Service Executive | Service Owner | Business Relationship Management |
|-------------------------|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Implement</u> | <p>Authorize release of new services</p> <p>Authorize retirement of services</p> | <p>Accountable for end-to-end service delivery</p> <p>Authorize major service changes and releases</p> <p>Ensure service quality</p> <p>Lead service team and resources</p> <p>Manage partner relationships</p> | <p>Ensure validation of service architecture with business and clients</p> <p>Business liaison for service implementation issues</p> <p>Manage resolution follow-up</p> <p>Approve service improvements</p> <p>Prepare clients for service deployment and changes</p> |

| Role | Service Lifecycle Management | Service Offering Management | System/Technology/Architecture | Service Roadmap Management |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Implement | <p>Confirm service architecture</p> <p>Execute to deliver service against roadmaps and plans</p> <p>Authorize solution changes</p> <p>Prepare operations and support</p> <p>Update service portfolio records</p> <p>Manage production changes</p> <p>Manage overall service experience</p> | <p>Set client's service offering expectations</p> <p>Manage service offering adoption and utilization</p> <p>Confirm service offering design</p> <p>Design, build, test, implement solution changes</p> <p>Prepare operations and support</p> <p>Update configuration records</p> <p>Manage cross-function releases</p> <p>Manage time to capability through reuse</p> | <p>Conduct architectural reviews</p> <p>Update architecture as needed</p> <p>Provide guidance for implementation</p> | <p>Accountable for overall success of all program and projects within the service roadmap</p> <p>Manage program and project manager activities for programs and projects within the service category</p> <p>Develop plan for delivering goals and objectives for all programs and projects within the service roadmap</p> |

Service Lifecycle Stage 4: Operate

| Role | Service Executive | Service Owner | Business Relationship Management |
|----------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Operate</u> | Executive liaison for critical service issues | Engage major escalations Identify service improvements Accountable for service compliance Sustain service team role assignments | Business liaison for service operation issues Ensure value discussion is sustained Review service performance and experience with clients and service team Drive adoption and utilization Manage escalation and resolution follow-up |

| Role | Service Lifecycle Management | Service Offering Management | System/ Technology Architecture | Service Roadmap Management |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <u>Operate</u> | Quarterly value discussion and service review with business / clients Manage issues to resolution, incidents to recovery Manage vendors Manage service support Manage and report service budget | Manage SLA with client Manage service offering adoption and utilization Manage service availability, reliability, recovery, capacity, and maintenance Identify root cause and validate long-term fixes Service entitlement Manage vendor and support relationships | Assess need for architectural changes based on operational information Engage critical service issues and incidents through resolution Engage problem root-cause identification, and long-term fix | Track service roadmap success Update the service roadmap |

Service Lifecycle Stage 5: Optimize

| Role | Service Executive | Service Owner | Business Relationship Management |
|----------|------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Optimize | <p>Aggregate conversation with Services Executives and the business and clients</p> <p>Leverage Continuous Service Improvement (CSI)</p> | <p>Drive for service improvement and value enhancement with partners, vendors, and across IT</p> <p>Approve service improvement proposals with business and clients</p> <p>Negotiate internal support for service improvement</p> <p>Manage service budget and value</p> <p>Ensure service team receives appropriate feedback and recognition</p> | <p>Review service value and improvement requirements with business and clients</p> <p>Validate service improvement opportunities</p> <p>Help prioritize service improvements with business and clients</p> |

| Role | Service Lifecycle Management | Service Offering Management | System/ Technology/ Architecture | Service Roadmap Management |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| Optimize | <p>Identify overall service improvement and optimize opportunities</p> <p>Benchmark service performance</p> <p>Manage and report service budget and costs</p> <p>Sustain cohesive and effective service team</p> <p>Optimize service across offerings</p> | <p>Identify service offering improvements in detail</p> <p>Benchmark service offering performance</p> <p>Roll up/out long-term fix and solution best practices across IT</p> <p>Optimize offering across time</p> | <p>Consult with service team on technical and system opportunities for the service</p> <p>Roll up/out long-term fix and solution best practices across IT</p> | <p>Improve quality of roadmap</p> <p>Update the service roadmap</p> |

Client and Stakeholder Management Roles across stages

| Role | Service Executive | Service Owner | Business Relationship Management | Service Lifecycle Management | Service Offering Management | System/Technology Architecture | Service Roadmap Management |
|------------------------------------------|--------------------------------------------------------------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Stakeholder Management and Communication | <p>Evangelize IT's overall service capabilities and value</p> <p>Trusted Advisor and Partner</p> | Showcase and represent services | <p>Review service performance with client</p> <p>Prepare clients for service deployment and changes</p> <p>Evangelize service</p> <p>Communicate status & strategy</p> <p>Trusted Advisor</p> | <p>Report service performance</p> <p>Communicate service value</p> <p>Showcase and represent services</p> <p>Communicate status and direction</p> <p>Contribute to process improvements</p> <p>Share best practices</p> | <p>Showcase and represent service offerings internally with customers and industry</p> <p>Build client relationships</p> <p>Communicate solution, and business value</p> | <p>Advocate for technical aspects of the Service</p> <p>Architecture community participation & knowledge sharing</p> | Accountable for operational supportability of all projects and programs within the Service Roadmap |

Services Roles Frequently Asked Questions

Cisco IT has received many questions from employees regarding the service roles. Following are responses to the most frequently asked questions.

What are the IT service roles?

The IT service roles are specific to Cisco IT's business model and help to identify ownership of critical tasks and responsibilities in a services-oriented organization. The roles work in conjunction with IT job titles but do not replace existing IT job titles. The service roles are Service Executive, Service Owner, Service Lifecycle Management, Service Offering Management, Business Relationship Management, Service Roadmap Management, and System/Technology Architecture.

Why does Cisco IT need service roles?

Service roles are a critical component of the transformation to IT as a Services Organization. The roles are one part of the service management framework/playbook and are required to define the levels of accountability and responsibility for delivering IT services. Service roles will enable consistency in employee participation and expectations.

Does incorporating the service roles mean a restructure of IT, for example, around services or service teams?

From a human resources perspective, no. The goal is not to reorganize IT's formal reporting structures into service teams. First Cisco IT is aligning each service to the business, then identifying the roles needed by the service and the business, and finally identifying the people to fill those roles. The members of each service team will likely come from across the functional areas of IT.

Are all IT organizations adopting the service roles?

All IT organizations are aligning to a services orientation and are adopting the service roles. At a minimum, all identified services are expected to have a Service Executive and Service Owner, as well as assigned responsibility for System/Technology Architecture.

Will the new roles result in additional headcount?

The transformation to a services organization is not a program or a project that requires additional headcount. It is about Cisco IT's journey to evolve its organizational structure and mindset to a services orientation. The service roles are intended to define roles and responsibilities for existing IT employees and do not generate additional headcount. Implementation and adoption of the roles in IT groups will be realized through organizational and employee development and optimization, making services part of Cisco IT's DNA.

Will the service roles replace existing IT jobs?

The service roles are not job titles and are not designed to replace IT job roles. However, as Cisco IT continues on the services journey, traditional IT job roles might change to varying degrees, and more service management roles might be added. For example, an IT manager may assume some of the duties of a Service Owner. Similarly, in some instances, a project manager could take on the responsibilities of Service Lifecycle Management for a service.

Can one individual perform multiple service roles?

Yes. Think of each role as a bucket of related responsibilities for which a person has been identified. If time allows and people have the skills, they should be able to assume other roles as well. This will often be the case for less complex or more mature services where the practices are well understood and optimized, allowing an individual to traverse multiple service roles.

When will the new roles be ready?

Cisco IT is already implementing the new roles. Each organization is maturing along the ITaaS curve at a different rate and will formally apply the service roles as appropriate.

What is the difference between role and job profile?

The IT job profiles are career tracks supporting a long-term focus on personal development and growth. The service roles provide the next level of detail, and are more like job descriptions relating to a specific assignment.

Is everyone in IT supposed to have a service role?

Not all employees will be in a specifically named service role, but all employees will be expected to have a service focus as IT becomes aligned and optimized to deliver value through a client-centric approach. All individuals in IT

should understand how their roles and activities contribute to IT outcomes and the business capabilities that Cisco offers as solutions to customers and clients.

How will I be trained to be successful in my new role?

Cisco IT can only be successful moving to a services organization if everyone in the IT organization has a common understanding of services and how IT delivers them. A series of training classes for people assigned to service roles has been provided.

If I don't have a service role, does that impact my contribution within a services organization?

Everyone in IT has responsibility for delivering services. This has always been core to the work Cisco IT does and will continue to be. Employees who have not been assigned a specific service role are most likely responsible for delivering the service itself. Cisco IT is making this change to provide clear ownership and strategic oversight and alignment at the services level.

Who is communicating to clients (business functions and the workforce) about the new service roles and how it will impact them?

Senior management and all of IT, through existing relationships, provide information to clients regarding the shift of IT to a services organization, the new roles, and the impact and changes to expect. Ongoing, the Business Relationship Management role, supporting the Service Executive and Service Owner, ensures that dialogues continue in a structured and efficient manner.

Ultimately, everyone in IT is responsible for sharing with clients Cisco IT's drive toward a services organization and the benefits this will bring to Cisco.

Where can I find the qualifications required for any given service role?

The primary qualification is to have the skills – a combination of education, exposure, and experience – needed for the responsibilities of a given role. The first place to check is this best practice document, as it contains high-level descriptions of the responsibilities for each role. The skills to carry out these responsibilities are the qualifications.

You must also understand the needs of the service(s) to which you are assigned. Not all services need all skills or each skill in the same measure. Taking an objective look at the needs of each service will refine the list of skills and qualifications for your situation.

Do all of service roles report directly to the Service Owner?

The Service Owner is accountable for many aspects of a service, including identifying the service roles and team needed. However, this is not an organization-centric or human resources reporting-centric exercise. In step with a service-oriented approach, the team should be formed from across the IT organization and work cross-functionally to achieve the service objectives.

Will the title of project manager change to service manager?

Project manager and service manager are human resources job titles, indicating not only the responsibilities, but also the skills, development, and career track of an individual. Service roles are separate from human resources job titles and can be performed by multiple titles defined by human resources. A program manager might perform a service role if it is appropriate, but his or her human resources title need not change if the primary focus of the job is still project management. However, if an individual's primary focus and responsibility shifts from managing projects as a project manager to managing services full time, it would be advisable for that individual's job title to

accurately reflect his or her job focus, which would be true in any case. If a project manager becomes an IT analyst, a job title change would be made. Similarly, if a project manager becomes a service manager, a job title change would also be made.

How will I know if I will be taking on one or more of the service roles?

This information will come from the Service Owner in conjunction with your manager. The goal of a Service Owner is to first align each service to the business, then identify the roles needed by the service and the business, and finally identify the people to fill those roles.

The members of each service team will likely come from across the functional areas of IT. As the decisions are made, your manager will be involved to help ensure alignment between career objectives and service assignments.

Will everyone in IT end up in a service role?

The majority of IT roles remain largely unchanged, fulfilling project, analysis, people management, and technical roles that continue to be the core internal workings of IT. A greater awareness of service objectives will propagate to everyone in IT, with a smaller portion of the IT community spending the largest portion of the focus in the service roles.

Can I map my career plan to service roles or should it map to existing job profiles?

Map your career plan to job profiles. They are the career tracks supporting a long-term focus on personal development and growth. The service job roles are more specific, like a job description, and better suited to use in identifying individual performance review goals.

Will the service roles be given to people on top of their current work load?

Primarily this transition represents a realignment of activities that was already taking place. The new roles adjust the structure so that Cisco IT is aligned at the service level rather than the functional level. Instead of being an addition to one's work, the roles represent an adjusted perspective and responsibilities.

I am already in a service role today. Is that likely to change?

It is possible. If the service(s) to which you are assigned are well developed, defined, and aligned to the business, an immediate change in the service team is less likely. As additional services are aligned to the business, and the roles needed by each service are identified, people will be assigned to fill those roles, and the members of the service team might have to adjust roles in response to the service requirements.

Will I have a choice about being assigned to one of the new roles?

The service role you play will depend on your current role and skills. Your manager will work with you to help identify the service management role best suited to you based on the needs of each organization.

Will additional service roles be created over time?

As Cisco IT continues with the adoption of service management, it is possible that new service roles could be added, and existing service roles will certainly be refined over time.

I am already ITIL (IT Infrastructure Library) certified so do I need to take any action to understand the service roles?

ITIL is only one of many references that Cisco IT is using for its transformation to a services organization. In addition to your ITIL expertise, you will need to familiarize yourself with Cisco IT's overall approach to becoming a services organization, as well as understand how we are implementing tools such as the service catalogue. Reference this best practice. Talk with your manager about what the service roles mean for you, and join ITaaS discussions. ITIL-certified individuals should take the lead in Cisco IT's transformation, so there is much you can do to not only understand the service roles, but evangelize and improve them.

Once assigned, will there be a single reference point to identify the IT Service Owner (e.g., for responding to relevant customer requests for information)?

Yes. A Cisco IT Services Portfolio is being published that includes the services, service offerings, and associated owners and roles.

All services are currently assigned to Service Owners. Will that ownership change?

As organizations within IT evolve, new services are added and others are retired. And as people take on different roles and responsibilities, Service Owners may change.

Is the goal to have each service name assigned to only one Service Owner, and each service offering under that can have different Service Offering Managers?

That is correct. Ultimately, there will be one owner for the service, and potentially multiple people assigned to Service Offering Management for the related service offerings.

Should all of IT share a Business Relationship Management role?

Business Relationship Management, as the client-centric portion of the service roles model, must strive to keep the complexity, organizational structure, and language of IT transparent in client interactions. To do this, global IT will need to share Business Relationship Management responsibilities and sustain a simple, effective client relationship.

Which role is now ultimately responsible for establishing and ensuring that a service's SLA is met?

Ultimately, the Service Owner is responsible. The Service Owner might have distributed responsibilities to a service team, with Service Offering Management handling traditional SLAs for each offering. At the same time, Service Lifecycle Management ensures equitable client experience across all offerings of a service, and Business Relationship Management represents the client to ensure that SLAs are in place and maintained.

Has Cisco IT linked service roles to activities in the service lifecycle? If so, what guidelines did you follow?

See the RACI chart in this best practice document for the links between roles, activities, and the service lifecycle. Experience from within IT was blended with the IT Operating Model, ITIL, external perspectives, and internal validation to generate the RACI.

Who or which role decides if the client needs and requirements translate into a service? Which role(s) is responsible for determining whether or not a business function becomes a service?

With the new service roles, the client requirements are formally gathered by Business Relationship Management. While Business Relationship Management undergoes further development, client requirements can be gathered by the Service Owner or the Service Lifecycle Manager. The Service Executive can determine which business functions can be run as services.

What are the typical levels (titles) that go hand in hand with the roles? Especially what is the distinction between manager, project or program manager, and IT engineering titles aligning to the service roles?

Outside of the Service Executive, which is aligned to a senior staff vice president member, the remainder of the service roles and levels are assigned based on the needs of each service. Refer to the Roles/Titles matrix in this best practice document for typical titles associated with each service role.

Is there any guidance on how various service roles will map to career progression?

In this regard, service roles are no different than any responsibilities held by employees. (Remember, the service roles are roles, not job titles or profiles.) As always, employees should have ongoing career conversations with their managers to discuss areas of interest, proficiency, and career growth. Managers should align these areas to bodies of work within the organization that best fit the employee's developmental goals while meeting the needs of the business. The decision to give an employee responsibilities related to a particular service and service role should fit within the context of the employee's overall career development.

If an existing role doesn't fit into a named service role, does that mean the role becomes outsourced?

There is no relationship or connection between the service roles and outsourcing.

How does this change impact clients/users, in terms of information delivery and support?

The shift to a services organization brings a closer, more strategic relationship between IT and the business and clients. Business plans, changing client demands, and functional strategies will be mapped to service priorities and roadmaps. The prioritized roadmaps help IT service teams connect and align to the deliverables required to enable business capabilities, and support clients with the big-picture objectives in mind.

How does Cisco IT plan to handle architecture for services that are not automated and hence do not have system and technology components?

Not all the IT services are automated and therefore do not necessarily have a system or technology component. Examples of such IT services are release management, acquisition IT integration, architecture process management, and IT branding and positioning. The architecture function for such services primarily involves process design, and an architect will be designated for the non-automated services.

For More Information

To read additional Cisco IT best practices and case studies on a variety of business solutions, visit Cisco on Cisco: Inside Cisco IT www.cisco.com/go/ciscoit

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