

## ITIL Intermediate: Service Offerings and Agreements Course Summary

### Description

The ITIL Intermediate Qualification: Service Offerings and Agreements (SOA) Certificate, although a stand alone qualification, yet is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert in IT Service Management Certificate. The ITIL Certificate in Service Offerings and Agreements is intended to enable the course participants to apply the ITIL best practices during the Service Management Lifecycle. The course approach combines theoretical and hands-on knowledge transfer, including individual and group practical exercises.

### Topics

- Introduction
- Service Portfolio Management
- Service Catalogue Management
- Service Level Management
- Demand Management
- Supplier Management
- Financial Management
- Business Relationship Manager
- Service Offerings and Agreement Roles and Responsibilities
- Technology and Implementation Considerations
- Summary, Exam Preparation and Directed Studies

### Audience

The target group of the ITIL Expert Qualification Service Offering and Agreement is:

- Individuals who require a deep understanding of ITSM/ITIL Service Offerings and Agreement processes and how it may be used to enhance the quality of IT service support within an organization.
- IT professionals that are working within an organization that has adopted and adapted ITIL who need to contribute to an ongoing service improvement program
- Operational staff involved in Service Portfolio Management; Service Catalogue Management; Service Level Management; Demand Management; Supplier Management; Financial Management and Business Relationship Management who wish to enhance their role-based capabilities.

This may include but is not limited to, IT professionals, business managers and business process owners.

### Prerequisites

Individuals who have attained and have a proof of one of the following certifications:

- V3 ITIL Foundation certificate in Service Management; OR
- V2 Foundation plus the V3 Foundation Bridge certificate;

It is also strongly recommended that course participants:

- Possess 2 to 4 years professional experience working in IT Service Management

Have exposure working in the service management capacity within a service provider environment, with responsibility emphasizing on at least one of the following management processes:

- Service Portfolio Management
- Service Catalogue Management
- Service Level Management
- Demand Management
- Supplier Management
- Financial Management

### Duration

Five days

## ITIL Intermediate: Service Offerings and Agreements

### Course Outline

#### I. Introduction

- A. The concept of Service Management as a practice
- B. The concept of Service, its value proposition and composition
- C. The functions and process across the Lifecycle
- D. The role of Processes in the Service Lifecycle
- E. How Service Management creates business value
- F. How the processes within the Service Offerings and Agreement curriculum supports the Service Lifecycle

#### II. Service Portfolio Management

- A. The Service Portfolio and illustrate its relationship with the Service Catalogue and Service Pipeline
- B. How a Service Portfolio describes a provider's service and how it relates the business service with the IT service.
- C. The Service Portfolio Management methods

#### III. Service Catalogue Management

- A. The purpose, goal and objectives of the process
- B. The scope of the process
- C. The interface to the Service Portfolio
- D. The difference between a Business and a Technical Service Catalogue
- E. The importance of the Service Catalogue to the Service Lifecycle and the business
- F. Its policies, principles and basic concepts
- G. The use of key metrics, challenges, critical success factors and risks associated with the process
- H. The process including the utilization of the Service Catalogue by other processes and functions
- I. Produce a Service Catalogue

#### IV. Service Level Management

- A. The purpose, goal and objectives of the SLM
- B. The scope of the SLM
- C. The importance of the process to the Service Lifecycle and how its generate business value
- D. The principles and basic concepts
- E. The main activities, methods and techniques of this process and how it relates to the Service Lifecycle. This includes the SLA structures and determining Service Level Requirements
- F. The process deliverables
- G. Monitoring of service performance against SLAs
- H. The use of key metrics, challenges, critical success factors and risks associated with the process
- I. The contents of SLAs, OLAs and review meetings
- J. The interfaces to other processes and functions

#### V. Demand Management

- A. The basic concepts of the process
- B. Activity based Demand Management and business activity patterns
- C. The interfaces to Service Portfolio
- D. Managing demand for Service

#### VI. Supplier Management

- A. The purpose, goal and objectives of the process
- B. The scope of the process
- C. The importance of the process to the Service Lifecycle and how they generate business value
- D. The principles and basic concepts
- E. The main activities, methods and techniques of this process and how it relates to the Service Lifecycle including evaluation of new suppliers
- F. The use of Supplier Categorization and maintenance of the Supplier Database

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### Course Outline (cont'd)

- G. The use of key metrics, challenges, critical success factors and risks associated with the process
- H. The inputs and outputs of the process

#### **VII. Financial Management**

- A. The purpose, goal and objectives of the process
- B. The scope of the process
- C. The concepts of Service Valuation
- D. The importance of the process to the Service Lifecycle and how they generate business value
- E. The various aspects of the process and the basic concepts – funding, accounting and chargeback
- F. Return on Investment and the business case
- G. The main activities, methods and techniques that enable this processes and how it relates to the Service Lifecycle
- H. Design and Implement a Financial Management process

#### **VIII. Business Relationship Manager**

- A. The role of Business Relationship Managers

#### **IX. Service Offerings and Agreement Roles and Responsibilities**

- A. Key roles and responsibilities of the Service Catalogue Manager
- B. Key roles and responsibilities of the Service Level Manager
- C. Key roles and responsibilities pertaining to the Supplier Manager

#### **X. Technology and Implementation Considerations**

- A. The generic requirements for technology to assist Service Design the evaluation criteria for technology and tooling for process implementation
- B. The good practices for practice and process implementation
- C. The challenges, Critical Success Factors and risks related to implementing practices and processes
- D. How to plan and implement Service Management technologies

#### **XI. Summary, Exam Preparation and Directed Studies**