7 Tips to Help You Adopt Continual Service Improvement

by Stuart Rance

CONTINUAL SERVICE IMPROVEMENT

Continual Service Improvement (CSI) is one of the most important concepts in ITIL, but very few IT organizations put anything in place to make it happen. Everyone knows that they need a service desk, and that they need incident management and change management.
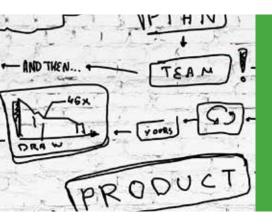
An IT organization without these things would deliver terrible service and have customers that are completely dissatisfied. I think that the same applies to CSI. If you aren't continually improving your services, your processes, and your technology, then at best you will stagnate, while your competition gradually leaves you further and further behind. Staying still is not an option when everyone else is improving; it's just a way to gradually decline into irrelevance.

It's fairly easy to get started with CSI and it can make a huge difference to the value you create for your customers. In this article I'll give you some practical suggestions of things you can do to make CSI work for you.

WHY DO YOU NEED CSI?

When you design a new service, or a new process, or some new infrastructure, it's never 100% perfect. If you spent the time it would actually take to eliminate all errors and inefficiencies, it would take so long that every project would be delivered too late to have any value. This means that whenever you create a new (or updated) service (or process) it already has things wrong with it even before you get started.

If you have CSI in place then this won't matter, because you will immediately start monitoring and improving things, so that they gradually approach the perfection that you'd like to offer your customers. You won't ever achieve perfection, but you can keep getting closer.

Don't think that CSI is just about processes, or just about the efficiency of the IT department. CSI should help you to achieve things that have a direct impact on your customers.

CSI can help you to:

- **Review and improve your service portfolio**, to ensure that you are delivering the services that your customers need, not just the services you've always delivered in the past.

- **Review and improve every service**, to ensure that it delivers what your customers expect, not just what you thought they needed.

- **Review and improve your technology**, to ensure that it underpins your services, helping you to deliver high quality services that meet customer expectations with minimum cost and maximum flexibility.

- **Review and improve your IT service management (ITSM) processes**, to ensure that they underpin delivery of the services, that they help you to meet customer expectations, and that they help you work efficiently to minimize the cost of delivering services.

- **Review and improve the skills and competence of your people**, to ensure that IT personnel have the right skills and competence to manage the technology, execute the processes, and deliver the services.

CSI won't instantly make all of these things perfect, but it will help you to continually improve them, so that you can keep up with ever increasing customer expectations, and so that you can stay ahead of your competition.

1.

Think about attitudes, behavior, and culture

Many people think that CSI is a process, and they set about implementing CSI with process documentation, tools, a process owner, etc. Then they wonder why it isn't working. The reason this approach doesn't work is because fundamentally CSI is about people, and their attitudes, behaviour, and culture (ABC). If you are not currently doing CSI and you want to start then you have to change the behaviour of your people, and process documentation is very unlikely to achieve that.

The only way to get CSI working is to focus on the ABC. Everyone needs to understand the value of learning from failure, rather than blaming the person who failed.

This can only be achieved if senior management sponsors CSI, and helps to persuade all your staff that CSI is in their future.

The catch phrase "fail early fail often" is often used to capture the idea that every failure is an opportunity to improve, if only we have the courage to take it.

Organizations that never fail never get a chance to improve. The trick is to learn to fail quickly, have the courage to notice when things aren't going right, and empower everyone to speak up and say so, that way your failures will be cheap, and you can afford to learn from them.

Think about implementing "blame-free post mortems" for major incidents and problems, and for failed projects. These are reviews that make it very clear that nobody will be blamed. This encourages people to be honest about what really happened, and this helps to give the kind of transparency that is needed for improvement.

2.

Distribute responsibilty for CSI throughout the organization

If you appoint a CSI manager and tell staff that the CSI manager is responsible for CSI, then everyone else will feel that they can leave it to the CSI manager.

CSI can only be effective when everyone feels responsible for improving their own practices, and contributing to CSI for the teams and groups they are part of.

Each person should be made to feel that they are responsible for improvement of their own work. They should consider their skills and competence, and work with their manager to ensure that these are appropriate for their role. They should review the work they are doing and make sure it is done as well as they can.

People may even wish to maintain personal "CSI registers" where they track their own development and improvement activities (see Tip 4 for suggestions on how to manage a CSI register).

Each team should take responsibility for the work done by the team. The team leader or supervisor should maintain a CSI register and use this to log and manage opportunities for the team to improve.

Everyone in the team should be empowered to notice and report things that need to be improved, and the team lead or supervisor should celebrate failures as an opportunity for everyone to learn.

Similarly, every process owner and service owner should maintain a CSI register for their process or service, encourage people to submit improvement suggestions, and make sure that the improvements are tracked and managed.

This approach should be cascaded throughout the entire organization. Each level of management should maintain a CSI register that is used x capture and manage opportunities that need to be resolved at their level in the organization. Everyone in the organization should understand that improvements can be made at any point in the organization, and should be encouraged to contribute improvement suggestions.

3.

Use many different approaches to identify improvement opportunities

There are lots of different things you can do to identify improvement opportunities, and you should use as many of these as possible to ensure you get a wide range of different ideas for improvement.

Some of the ways you can identify improvement opportunities are:

- Listen to customer feedback and complaints, and ask your customers to suggest improvement opportunities. One way to do this is to ensure that regular customer review meetings include an opportunity for customers to request improvements.

- Engage all IT staff in CSI and invite them to submit improvement suggestions. This should include development staff and project management staff, as well as those in delivery roles.

- If you have one or more risk registers, then review these to see if they identify required improvements.

- Use post-implementation reviews for changes and projects to identify improvement opportunities.

- Encourage people doing problem management to identify opportunities to improve, in addition to the problem resolution that is their first goal.

- Encourage people doing incident management to identify opportunities to improve, in addition to the incident resolution that is their first goal.

- Carry out regular formal assessments of ITSM processes to identify gaps between what is done, what is expected, and best practice.

- Look at trends for your ITSM KPIs to identify areas that need to be improved.

4.

Log & track improvement opportunities in CSI registers

As you identify CSI opportunities you should log each one in a CSI register. Opportunity is a term we use to identify each potential improvement that we are going to consider. The CSI register doesn't have to be a big, complex tool. I usually use a simple spreadsheet, with one row for each opportunity. You should try to limit the amount of information you record about each opportunity, to keep things simple. If your team is all in the same location you could even use a whiteboard to make things very visible.

You will probably need more than one CSI register. You could have a separate one for each team/process/service, or you could combine some of these. Do what makes sense for your organization.

Think about what information you need in order to manage your improvement opportunities, and don't store any more than you have to.

I usually store information like:

Description
Description of what should be done.

Benefits
Benefits this improvement will bring, to the business and to IT.

Urgency
I usually use a High/Medium/Low scale to indicate whether there is a pressing need to deal with this or whether it could wait for a while.

Cost
I usually use a High/Medium/Low scale for this as well. You may need to identify more accurate costs later, but at this stage we just need an idea.

Time/Effort
Again, a simple High/Medium/Low is sufficient to help decide which opportunities you want to progress.

Owner
The name of the person who is going to be responsible for managing this opportunity. At first this will be the person who is going to do any further investigation, later it might be the person who is going to design and implement the improvement.

Status
I usually use a few standard status codes like Logged, Under Review, Rejected, Approved, Ongoing, Complete, Closed.

✱ You will probably find other fields you need to add, but start as simple as you can and only add things when you find you really need them to manage the CSI opportunities.

5.

Prioritise improvement opportunities; don't try to do too much at once

When you have a few opportunities logged in your CSI register, you can start to prioritise them and select which ones you're going to invest in. Rather than define complex rules for this, I usually find that common sense is sufficient.

For example, any opportunity that has High Urgency, High Benefit, and Low Cost should be treated as a quick win. Just do it. Opportunities with Low Benefit and High Cost can be rejected without too much discussion. Opportunities with High or Medium Benefit and High or Medium Cost will need a business case to justify the spending. Pick the most likely looking two or three of these and get the owner to write up a business case.

It's really important that you don't try to do too much at once. Just pick a small number of improvements at first, and when these are complete you can start on some others. If you start a large number of improvements at the same time, they are likely to stall. This will not only lead to a lack of improvement but could also cause people to lose all faith in the CSI approach.

The best way to manage the improvement opportunities is by using Agile and Scrum. This involves treating the CSI register as an agile backlog, and creating a sprint for each improvement opportunity that you decide to implement. If you've never used agile before and this sounds a bit scary then why not put "Learn about agile" on your personal CSI register and make this one of your first improvement activities?

If your organization has a preferred project management approach, then you should probably use this to manage many of the improvement opportunities. Don't worry if some of the opportunities are too quick and simple for a formal project, just get on with those in any way that works for you.

Another helpful technique is to use a Kanban board to make the CSI work visible and ensure you don't have too much work-in-progress at any time. This can work very well if you are using a whiteboard as your CSI register. You can use Kanban with software tools but it works best with a physical board in the middle of a team's work area.

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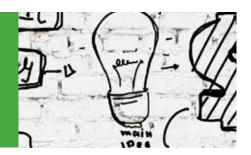
6.

Hold formal review at the end of each improvement activity

It is really important to review every improvement activity to see if it really delivered what you expected it to. This does not just mean checking that you delivered whatever it was that you planned; you also need to check that you created the benefits that you expected to. For example:

- If you modified your change management process so you could reduce the time it takes to reply to customer change requests, then compare the average time it took to respond to customer change requests before and after making the change.

- If you modified the process for creating new user accounts so that new staff could start working sooner (after joining the company), then ask the hiring managers how long it takes for new staff to start working before and after the improvement.

If you are using agile, then this will be done as part of the retrospective at the end of each sprint. If you are using a formal project management methodology, then this will probably include a post-implementation review. In any case you must always carry out a review like this and capture the actual results back into the CSI register.

7.

Keep adding things to the CSI register, reviewing, and re-prioritising the register

Your CSI register should not be a static list of ideas that were generated by an ITSM consultant who carried out a review last year. It should be a dynamic list of things you've identified that could be improved. You need to keep adding new things all the time, and you need to review the urgency, cost, and benefit of things that have been on the list for a while.

Sometimes the urgency may have gone up because the underlying issue hasn't been addressed and the business impact is being felt. Other times the urgency may have gone down, or the issue may have gone away altogether. How often you should review your CSI register depends on too many different factors for me to give a rule, but it is unusual to do this more frequently than once every week or less frequently than once every three months.

While you are carrying out this review you should also identify improvement activities that aren't making progress and chase these up to see why not. They may need more resources, or help to resolve a logjam.

You should also use this review to document the overall cumulative impact of all the improvements you have completed. This data is essential to justify the investment in CSI, and can also be used to create reports that will help encourage the attitudes, behaviour and culture you need for CSI to become embedded in your organization.

SUMMARY

As you read through the ideas in this document I hope that you have seen how easy it can be to implement CSI. The key things to remember are:

TIP 1
Think about attitudes, behaviour, and culture
This is the most important thing to get right. If your people believe in CSI then it will happen, and it will create value. If CSI is seen as yet another layer of bureaucracy then it will have no value at all.

TIP 2
Distribute responsibility for CSI throughout the organization
Don't rely on a CSI manager to implement CSI. It should be part of everyone's job.

TIP 3
Use many different approaches to identify improvement opportunities
It's easy to identify things that need to be improved, just talk to your customers and your staff and they will happily tell you what's needed.

TIP 4
Log and track improvement opportunities in CSI registers
all your improvement opportunities on a whiteboard or a spreadsheet. Don't make things too complex, you should only record the information that youreally need to prioritize and manage the improvement opportunities.

TIP 5
Prioritise improvement opportunities; don't try to do too much at once
It's better to make a few improvements than to take on too much and not make any progress. Use Agile and Scrum to manage each improvement, and use a Kanbanboard to make the backlog visible.

TIP 6
Hold a formal review at the end of each improvement activity
If the attitudes, behaviour, and culture of CSI have become embedded in yourorganization then carrying out a no-blame review at the end of everything you do should be normal behaviour.

TIP 7
Keep adding things to the CSI register, reviewing, and re-prioritising the register
The CSI register must be an active tool, not just a record of an ITSM review you carried out once.

If you follow these tips, then you should be able to start improving very quickly, and after a while you'll be amazed at how different things are.

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