SysAid

HOW TO INITIATE

Continual
Service Improvement

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The purpose of this workshop is to help you initiate continual service improvement (CSI) within your organization. You will create a CSI register – a prioritized list of improvements; and assign responsibility for managing the highest priority improvements to named team members.

You could run this workshop within one team, but it will work best if people from a range of different IT teams participate.
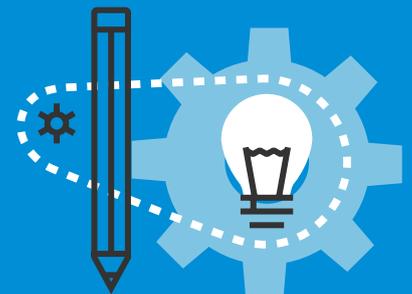
Before the Workshop

Decide who will take responsibility for managing the CSI register and for following up improvement activities. Ideally, this person will also facilitate the workshop, and create a provisional template for the register. The template could be a spreadsheet that can be projected so everyone can see it, or columns on a whiteboard or flipchart.

A typical CSI register includes:

- Unique ID
- Description
- Status
- Log Date
- Cost/Effort
- Impact/Benefit
- Priority
- Owner
- Due Date

However all of these can be modified to suit your needs. If you already have an effective risk register, then you can simply use that as your CSI register.

To run the workshop you will need:

- A room big enough to hold all the people
- A whiteboard and pens
- At least one flipchart for each 4 people, with pens
- A laptop, projector, and screen (if you are planning to use a spreadsheet for your CSI register)
- Someone to take notes and make sure contributions are recorded
- Lots and lots of enthusiasm
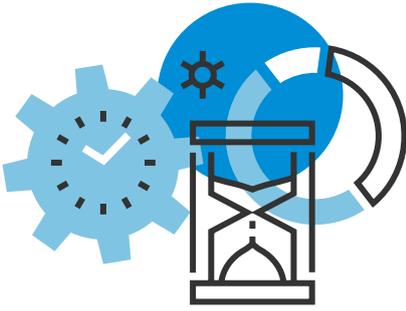
Identify Improvement Opportunities

Split into small groups; each group will need a flipchart or some other way to record ideas. Ask the groups to list things that need improving. It's very important to make sure that everyone knows this is a safe environment with no negative impact for identifying issues.

Use questions to prompt the groups, if required, for example:

- What stops you from delivering excellent service?
- What obstacles get in the way of doing your job?
- What do you do that doesn't really create any value for customers?

DON'T WE NEED AN IT SERVICE MANAGEMENT (ITSM) ASSESSMENT TO IDENTIFY WHAT NEEDS TO BE IMPROVED?

Experience shows that people almost always know what needs to be improved. If you make space for them to share their ideas, they will have no difficulty identifying improvement opportunities.

After you make your first few improvements, a formal ITSM assessment may help to identify more.
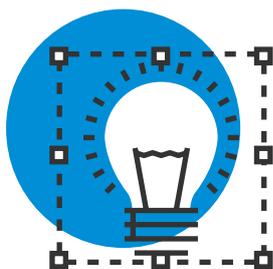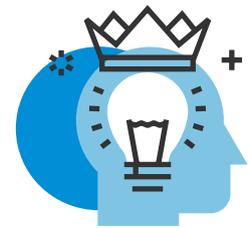
TASK 2

Introduce and Modify Your CSI Template

Share the template with workshop participants and discuss the format. Make any improvements people identify.

Add the Improvement Opportunities to the CSI Register

TASK 3

Ask each small group to share the improvement opportunities they identified. Discuss the benefit each improvement would create, the cost or effort needed to implement the improvement, and (where possible) the ideal "owner" of the improvement. Use your template to record these ideas.
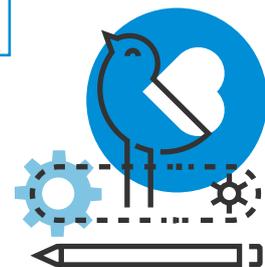
Prioritize Improvement Opportunities

Identify high benefit and low cost/effort improvements. These can be managed as 'quick wins'.

Next, identify opportunities with low benefit and high effort; these are low priority.

Facilitate a discussion of how the team should prioritize other improvement opportunities, guided by the prior discussion of benefits and costs/effort.
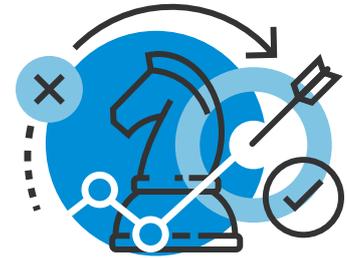
Assign Owners and Due Dates

Decide which improvements to tackle first, based on available resources. Don't start too many at once. You won't make progress and people will lose confidence in the process.

Ask for volunteers to manage the quick wins and some high priority improvements, but don't force people to take on more work than they are confident they can manage.

Then, move on to setting and agreeing on due dates for the improvements.

Set a Date to Review Progress

Finally, finish your workshop by setting dates for future reviews of progress made. You should give people long enough to get started, but not so long that they put off starting indefinitely.
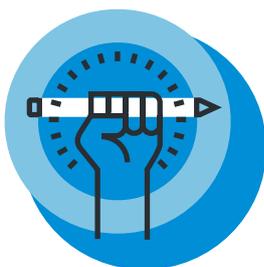
After the workshop you should keep looking for new improvement opportunities that you can add to your CSI register. These can then be prioritized when you hold review meetings, so that there are always new improvement opportunities waiting to be implemented. As you make the improvements, you should find that people become more enthusiastic about CSI, because they see the benefit of identifying improvements, prioritizing them, and taking action on the highest priority opportunities.

GOOD LUCK!