### STRATEGY MANAGEMENT FOR IT SERVICES PROCESS

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## Change history

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<td>xx/xx/2013</td>
<td>0.1</td>
<td>Branimir Valentic</td>
<td>Basic document template</td>
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1. **Purpose, scope and users**

The aim of this document is to define the purpose, scope, principles and activities of Strategy Management for IT services (referred as “Strategy Management” for the rest of the document).

This document is applied to the entire IT Service Management (ITSM) organization.

Users of this document are all employees of [organization name], as well as all external parties who have a role in the ITSM.

2. **Reference documents**

- Service Portfolio Management Process
- Continual Service Improvement Process
- Service Asset and Configuration Management

3. **Policy**

Strategy Management is a process which supports [organization name] in achieving business goals, defining criteria to decide which services will enable [organization name] to achieve those goals and how to efficiently manage services.

Strategy Management process has the following goals:

- Analyze internal and external environment to identify opportunities.
- Identify constraints that could prevent achievement of business outcomes. Define measures to reduce them or reduce their impact.
- Define position within the market.
- Produce and maintain strategy plan for IT in general, service management and strategy plans for every service that is provided.
- Manage strategies in alignment with the business, ensuring that IT strategy follows business strategy and its changes.

4. **Process**

Strategic assessment and Strategy generation are documented within the scope of the Strategic Plan, see Strategic Plan in Appendix.
4.1. Strategic assessment

4.1.1. Analyze internal and external environment

[role description] is responsible to analyze internal and external environments.

4.1.2. Define market spaces

Market spaces are opportunities where [organization name] can deliver its services. [role description] is responsible to document existing market spaces as well as any potential market spaces.

4.1.3. Identify strategic industry factors

Strategic industry factors are critical success factors (CSF) which determine success of the strategy decisions. For every market space, [role description] is responsible to perform this task.

4.1.4. Establish objectives

[role description] is responsible to establish strategy objectives.

Comment [BV6]: Usually, the same person as in 4.1.2.
4.2. Strategy generation

4.2.1. Determine perspective

[organization name]’s perspective is determined by its mission and vision statements. [role description] is responsible to define [organization name]’s perspective:

- Mission statement: [...]  
- Mission statement: [...]  

4.2.2. Form a position

Strategic position is a description of how [organization name] differentiates itself from its competition. [role description] is responsible to define the following (see Strategy Plan in Appendix):

- What services will be offered
- To what level
- To which customers

4.2.3. Craft a plan

[role description] is responsible to produce the Strategic Plan (see Appendix). The Strategic Plan describes how [organization name] will achieve its objectives, vision and position. Access to the plan is granted to:

- [...]  

[role description] is responsible for ensuring that the Strategic Plan is communicated to [Service Portfolio Manager].

4.2.4. Adopt patterns of action

[organization name] defines patterns of action through time.

The following pattern of action and follow-up activities are identified:

<table>
<thead>
<tr>
<th>Pattern of action</th>
<th>Follow-up activity</th>
<th>Relevant info</th>
</tr>
</thead>
<tbody>
<tr>
<td>[new PC ordered through Request Fulfillment process is delayed if dependent prior to customer delivery because equipment has to be set up. The new process caused a lot of time, which created more capacity to handle equipment setup.]</td>
<td>[Request Fulfillment Manager creates change in the process of ordering new equipment.]</td>
<td>Request Fulfillment Manager creates change in the process of ordering new equipment.</td>
</tr>
</tbody>
</table>

[role description] is responsible to define patterns of action and identify those that can create strategic advantage for [organization name].

4.3. Strategy execution
4.3.1. Service management processes

Assessment, setting of strategic objectives, market analysis and execution of strategy requires involvement of the organization and their managers which are within the scope of IT Service Management. [role description] in Strategy Plan development and strategy execution.

4.3.2. Align assets with customer outcomes

Strategy execution relies on the ability of [role description] to coordinate, control and deploy the assets. [role description] communicates with Service Asset and Configuration Management, Service Portfolio Manager and Financial Manager to ensure alignment and continuous execution.

4.3.3. Optimize critical success factors

[role description] is responsible to analyze results of strategic assessment, define missing CSFs (see section “Identify strategic industries”) and initiate and coordinate necessary activities to implement them.

4.3.4. Prioritize investment

Funding of the projects needed to achieve strategic goals is a prerequisite for strategy execution. [role description] prepare investment analysis, prioritize investment and communicate it to executives. See Service Portfolio Management where analysis of needed investment and (possible) return on investment is made.

4.4. Measurement and evaluation

4.4.1. Continual service improvement (CSI); expansion and growth

CSI and respective measurements contribute to strategy management in the following ways:

- [role description] identifies areas that are not performing to expectations
- CSI activities set baseline for next round of strategy assessment

[role description] defines methods and measurements which will contribute to strategy assessment.

[role description] is responsible to detect and define expansion and growth opportunities and make appropriate proposals.

5. Roles and responsibilities

5.1. IT Strategy Manager

[role description] assigns the IT Strategy Manager role.

Responsibilities of IT Strategy Manager:

Comment [BV8]: These are roles which are not implemented within this organization - change roles.

Comment [BV9]: Usually Strategy Manager (PMO) responsible for finances.

Comment [BV10]: Change according to situation.

Comment [BV11]: Adapt to your own situation.

Comment [BV12]: Strategy Manager or CSI Manager.
6. Measurement and metrics

6.1. Measurement

[role description] is responsible to

6.2. Metrics

Metrics reports are produced monthly, with quarterly and yearly summaries. Metrics to be reported:

- Achievement of strategic goals in budget, time and objectives segments
- Number of strategic objectives that are met
- Number of strategic objectives that are not met
- Number of changes in internal and external environments identified, compared with the number of changes made to strategy documents

6.3. Critical Success Factors (CSF) and Key Performance Indicators (KPI)

[role description] is responsible to define CSFs and respective KPIs. Achievements against KPIs are monitored and evaluated by [role description].

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Key Performance Indicator</th>
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<tbody>
<tr>
<td>There is a clear understanding of service</td>
<td>Mission and vision statements are defined.</td>
</tr>
<tr>
<td>providers' perspectives</td>
<td>Staff is trained to understand mission and vision</td>
</tr>
<tr>
<td>Changes to internal and external environment</td>
<td>Number of strategy goals that are not met.</td>
</tr>
<tr>
<td>are identified and adjustment of strategies</td>
<td>Potential activities defined to strategy</td>
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<td>made.</td>
<td>hold.</td>
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7. Managing records kept on the basis of this document

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<th>Person responsible for storage</th>
<th>Controls for record protection</th>
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Strategy Management for IT Services Process ver [version] from [date]
### 8. Validity and document management

This document is valid as of [date].

Owner of this document is [job title], who must... and, if necessary, update the document at least once a year.

### 9. Appendices

- Appendix 1 Strategy Plan

[signature]

Comment [BV15]: Usually Strategy Manager.

Comment [BV16]: Change if needed. Usually, they are updated, not deleted.

Comment [BV17]: Usually Strategy Manager.

Comment [BV18]: Change if needed.

Comment [BV19]: Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].

Comment [BV20]: This is only a recommendation; adjust frequency as appropriate.

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