



# Service Management Personas: Aligning Business Users to IT Service Provisioning

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## BACKGROUND

Service Management has historically focused on ultimately achieving an alignment between business users, their needs and requirements, and IT service provisioning. The framework that supports and enables Service Management, i.e. ITIL, has this as its primary goal and one of its critical success factor criteria. Unfortunately the success rate of Service Management and ITIL implementation has shown that in the majority of cases Service Management and/or ITIL adoption and implementation has not achieved the expected or anticipated future desired state results for various reasons. It is either too long, too costly, too complex has too large of an organizational impact or the needs of the adopter are ever changing along with the enhancements and/or complexity of the technology infrastructure.

For whatever reason, it might be a viable alternative for organizations and IT to look at things from a different perspective. If for no other reason than merely a pragmatic point of view, since Service Management (and its predecessor Systems Management) has been around longer than ITIL, some 40 odd years and assuming that an important differentiator between ITIL and ITSM being that if an organization wishes to make IT more efficient, it could implement ITIL, if however an organization wishes to make itself more effective, it could and should implement Service Management. Separation of these two makes sense in the way in which we approach IT service provisioning. That is, looking at Service Management from the business user perspective not from an IT capability perspective as would be done with ITIL.

This business user perspective has a mantra of:

*Any user can get to anything (information, data, devices, other users, etc.), assuming they have the appropriate authority, at any time using any device and means to satisfy their needs.*

In this scenario, the value IT provides as a service provider is determined and evaluated by the business user.

Today's business model/paradigm is changing in a way that our industry has seen happen only a couple of times in the past 50 years and its impact is one that is a major "game changer". Historically, technology has evolved bringing it closer to the end user and its use has evolved correspondingly. This has led to IT evolving from centralized data centers to distributed servers/workstations to the current construct that is one of mobile devices (BYOD) and cloud architecture encompassing virtualization that puts an added focus on automation to help achieve higher quality of service while meeting the demand of increasingly lower costs.

In essence, one step after another has occurred to bring an organization's goods and services closer and closer to both their internal and external customers. With this increase and the likelihood of its continuing to do so, with focus and frequency, there is an increased focus on one critical area. How can we better determine and understand the needs of the organization and its business requirements and subsequently align IT to meet this changing business paradigm?

In addition, IT must be proactive in its enabling of the business and organization to be *aware* of the competitive business environment, *adapt* to its changing needs rapidly and accurately and do so with *agility* that will allow for the inclusion and leveraging of new and existing technologies and meet the needs of the organization's business users.

## OVERVIEW

Something that has caught the attention of some organizations and IT departments is to look at *how* business users utilize technology, the manner in which they *perform* their business functions, the technologies they *utilize* to do so, and *when* they want/need to do it.

This is in essence can be considered their "use case" profile. It stands to reason that if we can do this accurately, we can subsequently align IT service provisioning to those aspects. Then it would follow that IT service provisioning then can be both predictive, proactive and provide an accuracy that will help enable adaptability and agility since it works **with** the business users' normal and natural usage of IT to which they have become accustomed.

They would not be asked or required to adopt and adapt to technologies that are not what they are used to using. This can help enable productivity increases and decrease the costs to IT and the organization due to increased effectiveness and efficiency in what technologies are used and how long it takes for business users to be productive.

Simply stated, the "profile" of a business user is done by creating a "use case" for them based on the technology they use, when and how they use it and what is their business use for the IT services, what are the associated drivers for business and usage and what are their pain points when performing their business functions. In this way user profile can be created that encompasses use cases by business user so we can be better able to align the services that are provisioned in a proactive manner to the business requirements that are needed more effectively and efficiently, with greater accuracy, adaptability and agility.

This is primarily due to the fact that the personas are based more on the business user profiles and usage characteristics rather than what IT can typically provide.

This enables meeting the dynamic requirements of the business users with a greater level of service quality and a decrease in service cost.

## **A FUNCTIONAL OVERVIEW OF PERSONAS**

This new approach of consuming IT services consists of understanding new ways that business users want to work such that a new service offering is developed for each persona type. This differs from the historic way of device orientation that acts as a gating factor in developing service offerings for approved devices.

This approach is attractive because it helps to enable benefits to the business by increasing the focus there instead of focusing on the cost of IT services and articulating Service Level Agreements.

This is done in several ways; by the use of personas it helps people work the way they want which in turn enables the company to have a competitive edge in attracting people with more expertise that have higher levels of productivity by using technologies and work habits that are familiar to them and can be more innovative. The cost and quality of service can improve since there is a better, more proactive understanding and enablement about the way employees want to work and lastly costs can be improved by better aligning IT service demand to capacity since business areas will be better able to select personas in line with the associated services that have costs already defined.

To help enable personas an Organization Transformation needs to be proposed, understood and implemented. In looking at various perspectives we can determine how to structure this transformation effort. Initially developing the personas themselves and then any associated persona based services so that the future desired end state can be achieved. Then developing and implementing effective Service Management disciplines around people, process, technology and information to help ensure on-going service improvement. And lastly, an organizational transformation to shift the focus so that business is driving IT service provisioning allowing for a better alignment of business requirements and IT services.

Let assume that the following 5 areas can be used to qualify the profile of end user personas and have sensitivity criteria for the end user work profiles (ranking 1-4):

- Technology – Quantify and qualify how it is used and to what extent
- Network – quantifying how much is used
- Interaction/Interfacing – qualifying how much is done with a team
- Communication – quantifying how much is done with others (customers/internal)
- Virtual/Mobile – quantifying how much is done at a desk or away

Some examples of possible personas:

Technology Support

- Technology – 2
- Network – 3
- Interaction/Interfacing – 1
- Communication – 4
- Virtual/Mobile – 1

Knowledge Worker

- Technology – 2
- Network – 3
- Interaction/Interfacing – 1
- Communication – 4
- Virtual/Mobile – 1

Business Analyst

- Technology – 2
- Network – 2
- Interaction/Interfacing – 2
- Communication – 3
- Virtual/Mobile – 1

Telecommuter

- Technology – 3
- Network – 3
- Interaction/Interfacing – 2
- Communication – 2
- Virtual/Mobile – 4

Virtual Executive

- Technology – 2
- Network – 2
- Interaction/Interfacing – 2
- Communication – 2
- Virtual/Mobile – 4

## **SUCCESS CRITERIA**

In order to help ensure that Personas can be accurately developed and adopted, the following are some areas we need to get right:

- Service Catalog
- Service Request Fulfillment
- Capacity Management
- Availability Management
- Security Management
- Incident, Problem and Change Management

## CONCLUSIONS

The ever increasing focus on Bring Your Own Devices (BYOD), cloud computing, technology advancements and changing business paradigms that are bringing customers closer to the organization with implications of competitiveness, cost and service is forcing us to look at IT Service Provisioning and business/IT alignment in new ways.

Effective and accurate development and utilization of personas for business end users could, if adopted and initiated, can proactively act as a catalyst for this much needed value provisioning of IT to the business.