

A GUIDE TO ITIL® INTERMEDIATE LEVEL COURSES



ITIL® v3 was born in 2007.

It marked a move away from the Process approach of V2, to a 'lifecycle' approach in V3, and with it a total overhaul of the training courses and associated examinations that are available.

This document looks only at the Intermediate level of ITIL® V3 training, which on successful completion, can take a student to the level of an 'ITIL EXPERT'. It does not cover the Foundation level (for which we have a standard course specification sheet) nor the 'Masters' level (which has no courses associated with it).

Intermediate courses are available in two streams, 'lifecycle' and 'capability'. They cover selected aspects of the five ITIL® V3 core books, but from different perspectives.

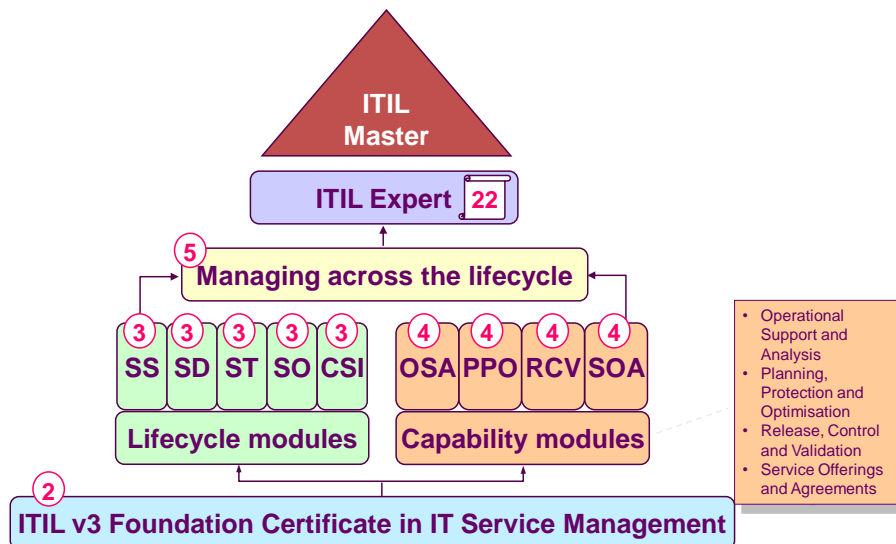
A simplified way of looking at the difference is that the 'lifecycle' stream is a management view of how processes in the relevant lifecycle stage can be used whereas the 'capability' stream goes into more detailed and practical use of the processes and concepts and is related to 'real jobs' people do in IT. Lifecycle courses do not cover the detail of the processes.

This guide is compiled from information taken from the official syllabi for the intermediate examinations and is a quick reference to what is covered in the various courses so students can pick the right course for themselves.

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The ITIL® V3 Qualification scheme



To be eligible for any of the Intermediate level courses you must have passed the V3 Foundation (or V2 plus bridge) exam.

Each course at the intermediate level is a free standing course in its own right.

To achieve the 'ITIL Expert' qualification you must attain 22 credits. Each lifecycle course is worth 3 credits and each capability course is worth 4 credits, the V3 Foundation is worth 2 credits.

If you decide to take the five lifecycle modules you will attain 15 credits, plus 2 from a Foundation, this gives the 17 required to take the Managing Across the Lifecycle (MALC) examination.

If you decide to take the four capability modules you will attain 16 credits, plus 2 from a Foundation, this gives 18, one more than the 17 required to take the Managing Across the Lifecycle.

The Managing Across the Lifecycle is worth 5 credits, which takes you to the 21 required to achieve the 'ITIL Expert' qualification

It is possible to mix lifecycle and capability modules however there are rules as to which. These rules are quite complex, for further information see:

<http://www.ital-officialsite.com/Qualifications/ITILCreditAdministrationPolicy.aspx>

To achieve the ITIL Expert is a minimum of 6 courses (Foundation, four capability and MALC) and a minimum of 23 days training. Plan carefully!

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ITIL® V3 'CAPABILITY' COURSES

This section of the document outlines the course contents and formats for the four Intermediate 'Capability' courses.

The courses are given over five days with the examination taking place at the end of the last day.

Please note the relevant lifecycle publications are NOT included in the training pack. (This is because students are expected to do some self-study before the course, so will need access to the books before the course)

All courses comprise formal lecturing, discussions, exercises and mock examination questions.

The Capability stream comprises four courses which can be viewed as being constructed around 'IT jobs', a practical view of ITIL® V3 processes from the perspective of...

Operational staff	>	Operations Support and Analysis <i>Access Management, Event Management Incident Management, Problem Management, Request Fulfilment plus operational aspects of processes from Service Design and Service Transition.</i> <i>The four Functions, Service Desk, Technical Management, Application Management and IT operations Management (It Operations Control and Facilities Management)</i>
"Service Designers"	>	Planning, Protection and Optimisation <i>Availability Management, Capacity Management Demand Management, Information Security Management, ITSCM</i>
"Implementation"	>	Release, Control and Validation <i>Change Management, Evaluation, Knowledge Management, Release & Deployment Management, Request Fulfilment, Service Asset and Configuration Management, Service Validation & Testing</i>
Service Level Managers	>	Service Offerings and Agreements <i>Demand Management, Financial Management, Service Catalogue Management, Service Level Management, Service Portfolio Management, Supplier Management</i>

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Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL® Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

Eligibility for Examination

To be eligible for the ITIL® Intermediate qualifications, candidates shall fulfil the following requirements:

- At least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organization (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- There is no minimum requirement but a basic IT literacy and around 2 to 4 years professional experience years IT experience are highly desirable
- Hold the ITIL® V3 Foundation Certificate in IT Service Management or ITIL® V2 Foundation plus the bridging certificate
- It is recommended that students should complete at least 12 hours of personal study by reviewing the syllabus and the pertinent areas of the ITIL® Service Management Practice core guidance publications.

Format of the Examination

The exam comprises eight (8) multiple choice, scenario-based, gradient scored questions.

Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.

The duration of the examination is a maximum 90 minutes for all candidates in their respective language.

Provisions for additional time for candidates completing an exam:-

- in a language that is not their mother tongue, and
- in a country where the language of the exam is **not** a business language in the country,

They have a maximum of 120 minutes to complete the exam and are allowed the use of a dictionary.

The exam is 'closed book' with no reference to any documentation (dictionary excepted)

The pass score is 28/40 or 70%

Operational Support and Analysis

Syllabus at a Glance:

Learning Unit OSA01: Introduction to Operational Support and Analysis

- Full understanding of Operational Support and Analysis (OSA) terms and core concepts
- The concept of Service Management as a practice
- How it delivers value to customers and the business
- The underpinning processes and functions that support the Service Lifecycle
- Which stages of the Service Lifecycle contribute to Operational Support and Analysis how they interact

Learning Unit OSA02: Event Management

- The Event Management process inclusive of its design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Efficient Event Management and provide examples of how it is used to ensure Quality Service within OSA
- The benefits and business value that can be gained from Event Management

Learning Unit OSA03: Incident Management

- The Incident Management process inclusive of its design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- The measurement model and the metrics that would be used to support Incident Management within OSA practices
- The benefits and business value that can be gained from Incident Management

Learning Unit OSA04: Request Fulfilment

- The Request Fulfilment process inclusive of its design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- The measurement model and the metrics that would be used to support Incident Management within OSA practices
- The Benefits and business value that can be gained from Request Fulfilment as related to OSA

Learning Unit OSA05: Problem Management

- The end-to-end process flow for Problem Management inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- A measurement model and the metrics that would be used to support Problem Management within OSA practices
- The benefits and business value that can be gained from Problem Management

Learning Unit OSA06: Access Management

- The end-to-end process flow for Access Management process inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- A measurement model and the metrics that would be used to support Access Management within OSA practices
- The benefits and business value that can be gained from Access Management as related to OSA

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Learning Unit OSA07: The Service Desk

- The complete end-to-end process flow for the Service Desk function inclusive of design strategy, components, activities and operation as well as any interfaces with other processes or lifecycle phases
- The Service Desk validation components and activities (e.g. Service Desk role, organizational structures, challenges, issues safeguards, etc.) and how these test components are used to ensure Quality Service within OSA
- A measurement model and the metrics that would be used to support the Service Desk function within OSA practices

Learning Unit OSA08: Functions

- The end-to-end process flow for OSA Functions (i.e. Technical Management, IT Operations Management, and Applications Management) inclusive of design strategy, objectives, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- The benefits and business value that can be gained from functions as related to OSA

Learning Unit OSA09: Technology and Implementation considerations

- Technology requirements for Service Management tools and where/how they would be used within OSA for process implementation
- What best practices should be used in order to alleviate challenges and risks when implementing Service Management technologies

Release, Control and Validation

Syllabus at a glance:

Learning Unit RCV01: Introduction to Release, Control and Validation (RCV)

- The concept of Service Management as a practice and how it delivers value to customers and the business
- The underpinning processes and functions that support the Service Lifecycle
- What makes up the Service Capability RCV cluster (i.e. which stages of the Service Lifecycle contribute to this capability and how they interact) and its specific focus on Service Transition.

Learning Unit RCV02: Change Management

- The end-to-end process flow for Change Management inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes
- A measurement model and the metrics that would be used to support Change Management within RCV practices
- The benefits and business value that can be gained from Change Management

Learning Unit RCV03: Service Asset and Configuration Management

- The end-to-end process flow for Asset and Configuration Management inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes
- A measurement model and the metrics that would be used to support Service Asset and Configuration Management within RCV practices
- The benefits and business value that can be gained from Service Asset and Configuration Management

Learning Unit RCV04: Service Validation and Testing (SVT)

- The end-to-end process flow for SVT process inclusive of its design strategy, components, activities, roles and operation including its organizational structure as well and the interfaces with other processes
- SVT testing perspectives (e.g. Test requirement, conditions, environments, data, etc.) and how these test components are used to ensure service quality
- The benefits and business value that can be gained from SVT as related to RCV

Learning Unit RCV05: Release and Deployment Management

- The end-to-end process flow for Release and Deployment Management inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes
- The Release and Deployment model and related activities (e.g. design, planning, build, pilots, test, transfer, deployment, retirement, etc.) and how these activities ensure service quality
- The benefits and business value that can be gained from Release and Deployment Management

Learning Unit RCV06: Request Fulfilment

- The end-to-end process flow for Request Fulfilment inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes (e.g. Incident and Release)
- The Request Fulfilment model and related activities (e.g. effectiveness of designs, changes, performance, etc.) and provide examples of how these activities help to ensure Quality Service within RCV
- The benefits and business value that can be gained from Request Fulfilment Management

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Learning Unit RCV07: Evaluation

- The end-to-end process flow for Evaluation inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes
- The Evaluation model and related activities (e.g. effectiveness of designs, changes, performance, etc.) and how these activities help to ensure service quality

Learning Unit RCV08: Knowledge Management

- The end-to-end process flow for Knowledge Management inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes (e.g. CSI processes)
- The Knowledge Management model and related activities (e.g. DIKW, stakeholder management, metrics, etc.) and how these activities help to ensure service quality
- The benefits and business value that can be gained from Knowledge Management

Learning Unit RCV09: Release, Control and Validation Roles and Responsibilities

- The roles and responsibilities related to Change Management, Service Asset and Configuration Management, Service Validation and Testing, Release and Deployment Management, Request Fulfilment, Evaluation, and Knowledge Management. Where and how these are used, as well as, how they fit within the Service Transition organization

Learning Unit RCV10: Technology and Implementation Considerations

- The technology requirements for Service Management tools, where how these would be used within RCV for process implementation (e.g. Knowledge Management and Service Asset and Configuration Management)
- The need and benefits of tools that support Service Transition as related to RCV
- Implementing processes including planning and managing Change, Service Operation, project management, risk management, and staff considerations.
- What best practices such as the “Deming Cycle” should be used in order to alleviate challenges and risks when implementing Service Management technologies as well as designing technology architectures.

Service Offerings and Agreements

Syllabus at a Glance:

Learning Unit SOA01: Introduction to Service Offerings and Agreements

- Service Management as a practice
- How it delivers value to customers and the business
- The underpinning processes and functions that support the Service Lifecycle
- Which stages of the Service Lifecycle contribute to Service Offerings and Agreements and how they all interact

Learning Unit SOA02: Service Portfolio Management

- Service Portfolio Management inclusive of its design strategy, components, methods, activities, roles and operation including its organizational structure and the interfaces with other processes
- Service Portfolio Management in relationship to the Service Catalogue and Service Pipeline and how these support SOA
- The benefits and business value from Service Portfolio Management

Learning Unit SOA03: Service Catalogue Management

- Service Catalogue Management inclusive of its design strategy, components, activities, roles and Operation including its organizational structure and the interfaces with other processes
- Service Catalogue in relationship to the Service Portfolio, the Business Catalogue, the Technical Service Catalogue and how these components are used to ensure quality service within SOA
- Metrics and Critical Success Factors (CSFs) associated with Service Catalogue Management in support of SOA

Learning Unit SOA04: Service Level Management

- Service Level Management (SLM) inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- SLM components and activities including Service Level Agreements (SLAs) structures, Service Level Requirements (SLRs), Operational Level Agreements (OLAs), Critical Success Factors (CSFs), Underpinning Contracts (UCs) their metrics, performance and monitoring
- How these components are used to ensure quality service within SOA
- The benefits and business value of SLM

Learning Unit SOA05: Demand Management

- Demand Management process inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Demand especially as it relates to business activity patterns and how it is used within SOA
- Service Portfolio interaction with Demand Management and how demand can be managed for service in relation to providing Business benefits and in support of SOA

Learning Unit SOA06: Supplier Management

- Supplier Management process inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Supplier Management components and activities (e.g. Supplier Categorization, Supplier Evaluation, Supplier and Contract Database, metrics, etc.) and how these are used to ensure quality service within SOA
- The benefits and business value that can be gained from Supplier Management as related to SOA

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Learning Unit SOA07: Financial Management

- Financial Management inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Financial Management components and activities including funding, accounting, chargeback, Return on Investment and how these are used to ensure quality service within SOA
- The benefits and business value that can be gained from Financial Management

Learning Unit SOA08: Business Relationship Manager

- The Business Relationship Manager roles and responsibilities, and how they support SOA
- Business Relationship Manager activities and how these are used to ensure quality service within SOA

Learning Unit SOA09: Service Offerings and Agreement Roles and Responsibilities

- The roles and responsibilities related to Service Catalogue Manager, Service Level Manager and the Supplier Manager and how they fit within the Service Design organization to support SOA

Learning Unit SOA10: Technology and Implementation Considerations

- Service Management tools and where/how they would be used within SOA for process implementation
- The tools that support SOA
- Challenges and Risks when implementing SOA practices and processes

Planning, Protection and Optimization

Syllabus at a Glance:

Learning Unit PPO01: Introduction to Planning, Protection and Optimization

- The concept of Service Management as a practice and how it delivers value to customers and the business
- The underpinning PPO processes and functions that support the Service Lifecycle
- What makes up the Service Capability cluster “Planning, Protection and Optimization” (i.e. which phase of the Service Lifecycle contribute to this capability and how they all interact) and its specific focus on Service Design

Learning Unit PPO02: Capacity Management

- The end-to-end process flow for Capacity Management inclusive of its design strategy, components, activities, roles and operation, organizational structure and its interfaces with other processes
- A measurement model and the metrics that would be used to support Capacity Management within PPO practices
- The benefits and business value that can be gained from Capacity Management

Learning Unit PPO03: Availability Management

- The end-to-end process flow for Availability Management inclusive its design strategy, components, activities, roles and operation, organizational structure and its interfaces with other processes
- The benefits and business value that can be gained from Availability Management
- A measurement model and the metrics that would be used to support Availability Management within PPO practices

Learning Unit PPO04: IT Service Continuity Management (ITSCM)

- The end-to-end process flow for ITSCM inclusive its design strategy, components, activities, roles and operation, organizational structure and its interfaces with other processes
- The four stages of ITSCM (i.e. Initiation, Requirements and Strategy, Implementation and Ongoing Operation) and how each can be used to support PPO
- A measurement model and the metrics that would be used to support ITSCM within PPO practices
- The benefits and business value that can be gained from ITSCM

Learning Unit PPO05: Information Security Management

- The end-to-end process flow for Security Management inclusive of its design strategy, components, activities, roles and operation, organizational structure and its interfaces with other processes
- A measurement model and the metrics that would be used to support Security Management within PPO practices
- The benefits and business value that can be gained from Security Management

Learning Unit PPO06: Demand Management

- The end-to-end process flow for Demand Management inclusive of its design strategy, components, activities, roles and operation, organizational structure and its interfaces with other processes
- Activity-based Demand Management as it relates to business and user activity patterns and how these contribute to Core and Service Level packages
- The benefits and business value that can be gained from Demand Management in support of PPO

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Learning Unit PPO07: Challenges, Critical Success Factors and Risks

- The challenges and risks (e.g. staff, funding, management, etc.) in relation to: Capacity, Demand, Availability, ITSCM and Security Management and how each challenge can be addressed
- Critical Success Factors related to Capacity, Demand, Availability, ITSCM and Security Management and how to measure and monitor them for each process and activity
- The challenges and risks as well as related Critical Success Factors that are associated with Service Design in its alignment with PPO

Learning Unit PPO08: Planning, Protection and Optimization Roles and Responsibilities

- The roles and responsibilities related to Capacity, Availability, ITSCM and Information Security Management, how they fit and are used within the Service Design organization to support PPO

Learning Unit PPO09: Technology and Implementation Considerations

- Service Management tools, where and how they would can used within PPO for process implementation
- The types of tools that support Service Design as related to PPO
- What best practices should be used in order to alleviate challenges and risks when implementing Service Management technologies and designing technology architectures.

ITIL® V3 'LIFECYCLE' COURSES

This section outlines the course contents and formats for the five Intermediate 'Lifecycle' courses.

Courses can be given over three or four days. Where a course is given over three days the examination will not take place at the end of the third day.

Please note the relevant lifecycle publication is NOT included in the training pack. (This is because students are expected to do some self-study before the course, so will need access to the books before the course)

All courses comprise formal lecturing, discussions, exercises and mock examination questions.

The courses in the Lifecycle stream cover the management and control of the activities and techniques within the lifecycle phases, but do NOT cover the detail of each of the supporting processes.

Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL® Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

Eligibility for Examination

To be eligible for the ITIL® Intermediate qualifications, candidates shall fulfil the following requirements:

- At least 21 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organization (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- There is no minimum requirement but a basic IT literacy and around 2 years IT experience are highly desirable
- Hold the ITIL® V3 Foundation Certificate in IT Service Management or ITIL® V2 Foundation plus the bridging certificate
- It is recommended that students should complete at least 21 hours of personal study by reviewing the syllabus and the Service Strategy publication in preparation for the examination

Format of the Examination

The exam comprises eight (8) multiple choice, scenario-based, gradient scored questions.

Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.

The duration of the examination is a maximum 90 minutes for all candidates in their respective language.

Provisions for additional time for candidates completing an exam:-

- in a language that is not their mother tongue, and
- in a country where the language of the exam is **not** a business language in the country,

They have a maximum of 120 minutes to complete the exam and are allowed the use of a dictionary.

The exam is 'closed book' with no reference to any documentation (dictionary excepted)

The pass score is 28/40 or 70%

SERVICE STRATEGY

Syllabus at a Glance:

Learning Unit SS01: Service Strategy Principles

- Understand the strategy of differentiating value-creation (attributes, perceptions and preferences) in the customer's mind
- Recognize what are assets and how to use them to create value
- Be able to define the three types of service providers and how/where they are used
- Comprehend value chain models and the vertical integration strategy they provide
- Grasp the fundamental aspects of service strategy and be able to define them

Learning Unit SS02: Defining Services and Market Spaces

- Be able to create services/strategies related to a customer's needs
- How to utilize assets (service and customer) to influence value creation
- How to use service archetypes to design a strategy based on asset-based and utility based positioning
- What strategies can be used to define market spaces by focusing services to support business outcomes

Learning Unit SS03: Conducting Strategic Assessments

- How to mutually reinforce capabilities and resources so that service management will be treated as strategic assets
- Ability to conduct a strategic assessment related to investment and financial business constraints
- Performing an analysis of a customer's needs, market spaces and alignment with business strategy to develop expansion and growth forecasts

Learning Unit SS04: Financial Management

- Be able to enhance and add value to a shared imperatives framework for business and IT
- Create, implement and measure service and financial demand modelling so that funding variations related to changes in demand can be quantified
- Provide analysis and guidance to determine how to select the appropriate IT funding models

Learning Unit SS05: Service Portfolio Management

- Have the ability to identify the strategic need as well as build a case for a Service Portfolio
- Design and implement a Service Portfolio management environment that includes all the methods: define, analyze, approve and charter.

Learning Unit SS06: Managing Demand

- Build a case for implementing demand management related to customer and/or market space requirements
- Ability to develop a capabilities based demand management strategy for a company
- Be able to integrate and relate all aspects of a Service Catalogue and Service Pipeline to demand and capacity
- Be able to design and implement service packages as well as to determine when/where/how service packages should be introduced and used

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Learning Unit SS07: Driving Strategy through the Service Lifecycle

- Develop strategies that utilize all the elements of the lifecycle (e.g. Service Catalogue, Service Pipeline, Contract portfolio, financial budgets, delivery schedules and improvement programs)
- Be able to construct and know where/when to utilize the different types of Service Models as well as where the different design “drivers” (e.g. outcomes, constraints, pricing) affect the strategy
- How to utilize Service Transition for decision analysis to evaluate options, paths, risk and costs related to proposed strategies
- How to utilize Service Operations and Service catalogue in regards to deployment patterns

Learning Unit SS08: Critical Success Factors and Risks

- Be able to provide insight and guidance in the design of IT organizations through the use of five organizational structures as well as Critical Success factor
- Be able to determine the need for and selection of automated tools to support the any strategic objectives you have put forth
- Utilize strategy to achieve operational effectiveness and to overcome organizational complexity

Qualification Learning Objectives

This qualification provides a complete overview of Service Strategy including all its related activities:

How to design, develop, and implement service management not only as an organizational capability but also as a *strategic asset*.

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Service Strategy Principles
- Defining services and market spaces
- Conducting Strategic Assessments
- Financial Management
- Service Portfolio Management
- Managing demand
- Driving strategy through the Service Lifecycle
- Understanding Critical Success Factors and risks

Note: Please be aware that the course covers the management and control of the activities and techniques within Service Strategy, but does NOT cover the detail of each of the supporting processes.

SERVICE DESIGN

Syllabus at a Glance:

Learning Unit SD01: Introduction to Service Design

- Understand the strategy of differentiating value-creation and articulate all the benefits to the business that result from efficient Service Design
- Service Acceptance Criteria and how to use them to create value
- The contents and use of Service Design Packages
- The underpinning processes, functions and assets that link business value to IT services
- The fundamental aspects of Service Design

Learning Unit SD02: Service Design Principles

- Design service solutions related to a customer's needs
- Design and utilize the Service Portfolio to enhance business value
- The measurement systems and metrics
- Service Design models to accommodate different service solutions

Learning Unit SD03: Service Design Processes

- The interaction of Service Design processes
- The flow of Service Design as it relates to the business and customer
- The five Design Aspects and how they are incorporated into the Service Design process

Learning Unit SD04: Service Design technology related activities

- Requirements engineering in the design process and utilizing the three types of requirements as identified for any system; Functional, Management/Operations and Usability
- The design of technical architectures for Data and Information Management, and Application Management

Learning Unit SD05: Organizing for Service Design

- How to design, implement and populate a RACI diagram for any process that is within the scope of IT Service Management
- The Service Design roles and responsibilities, where and how they are used and how a Service Design organization would be structured to use these roles

Learning Unit SD06: Consideration of Technology

- Service Design related Service Management tools, where and how they would be used
- The benefits and types of tools that support Service Design

Learning Unit SD07: Implementation and improvement of Service Design

- The creation, implementation and use of Critical Success Factors and Key Performance Indicators as ways to improve designed services
- The six-stage implementation/improvement cycle and how the activities in each stage of the cycle are applied
- How Business Impact Analysis, Service Level Requirements and risk assessment can affect service design solutions

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Qualification Learning Objectives

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Management and control of all Service Design activities
- Management and application of Service Design concepts, inputs, outputs and activities
- Knowledge of Service Design principles and management of Service Design processes
- Control and coordination of Service Design technology related activities
- Organisational and technological issues related to Service Design
- Analysis, justification and selection of the implementation approaches, challenges, critical success factors and risks
- The importance of Service Management as a Practice concept and Service Design Principles, Purpose and Objectives
- How all processes in ITIL® Service Design interact with other Service Lifecycle Processes
- The sub-processes, activities, methods and functions used in each of the ITIL® Service Design processes
- The roles and responsibilities within ITIL® Service Design and the activities and functions to achieve Service Design excellence
- How to measure ITIL® Service Design
- Technology and implementation considerations surrounding ITIL® Service Design
- Challenges, Critical Success Factors and Risks associated to ITIL® Service Design

Note: Please be aware that the course covers the management and control of the activities and techniques within Service Design, but does NOT cover the detail of each of the supporting processes.

SERVICE TRANSITION

Syllabus at a Glance:

Learning Unit ST01: Introduction to Service Transition

- The Flow of Service Transition and where the “Service Transition evaluation points occurs in the flow
- Ways that Service Transition adds value to the business
- The inputs to and outputs from Service transition as it interfaces with the other service lifecycle phases
- The fundamental aspects of Service Transition and be able to define them

Learning Unit ST02: Service Transition Principles

- The utility of a service as defined in terms of the business outcomes that customers expect
- How services provide value by increasing the performance of customer assets while removing risks
- Service Transition best practices in relation to stakeholder relationships and how these best practices can be applied
- How to ensure the quality of a new or changed service

Learning Unit ST03: Service Transition Processes

- How to integrate Service Transition with the processes that interact with Service Transition
- The flow of Service Transition as it relates to the transition planning, transition support, service validation and testing as well as evaluation.

Learning Unit ST04: Service Transition related activities

- How to address and manage Communication aspects/strategy of Service Transition
- How to address organizational change from planning through to communication and implementation, and the interactions with the other lifecycle stages
- How to use all the methods, practices and techniques available to manage change
- Stakeholder management and how to achieve this within an existing organization

Learning Unit ST05: Organizing for Service Transition

- Service Transition roles and responsibilities, where and how they are used as well as how a Service Transition organization would be structured to use these roles
- The interfaces that exist between Service Transition and other organizational units (including third parties) and the “handover points”
- Why Service Transition needs Service Design and Service Operation, what it uses from them and how

Learning Unit ST06: Consideration of Technology

- Technology requirements that supports Service Transition, where and how these would be used
- Types of Knowledge Management, Service Asset and Configuration Management and workflow tools that can be used to support Service Transition

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Qualification Learning Objectives

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Introduction to Service Transition
- Service Transition Principles
- Management and control of all Service Transition activities
- Service Transition Related activities around communications, commitment and organisational change
- Organizing Service Transition
- Control and coordination of Service Transition technology related activities
- Analysis, justification and selection of the implementation approaches, challenges, critical success factors and risks

Note: Please be aware that the course covers the management and control of the activities and techniques within Service Transition, but does NOT cover the detail of each of the supporting processes.

SERVICE OPERATION

Syllabus at a Glance:

Learning Unit SO01: Introduction to Service Operation

- The functions contained within Service Operations including how they interact to make Service Operations work
- The processes and service lifecycle phases that Service Operation interfaces with
- The fundamental aspects of Service Operation and be able to define them

Learning Unit SO02: Service Operation Principles

- How Service Operation is organized in relation to Functions, Groups, Teams, Department and divisions.
- How an organization can achieve balance when dealing with internal verse external organizational focus, identifying the issues related to organizations who operate at the extremes of these balances
- What “Operational Health” means, specifically addressing examples of “Self Healing Systems” and the processes used by them
- The creation, components and implementation of a complete communication strategy to be used with Service Operations

Learning Unit SO03: Service Operation Processes

- The use of and interaction of each of the five key processes that make up Service Operation
- The value to the business that each of the Service Operation processes contributes
- The use of and interaction of all other lifecycle operational activities that contribute to Service Operation

Learning Unit SO04: Common Service Operation Activities

- The difference between a Technology Centric and a Business Centric organization, the five levels of maturity and how Service Operation can be used to move towards increasing the Business Centric focus
- How the activities identified in this unit support Service Operation and provide a detailed model of how to integrate them into a Service Operation organization

Learning Unit SO05: Organizing Service Operation

- The objective, activities and roles of each of the four functions indentified in this unit and how to build a Service Operation model based on these functions
- Service Operation roles and responsibilities, where and how they are used as well as how a Service Operation organization would be structured to use these roles

Learning Unit SO06: Technology Considerations

- The technology that supports Service Operation, where and how these can be used
- The technology required to support each of the Service Operations processes and functions: Event Management, Incident Management, Request Fulfilment, Problem Management, Access Management and Service Desk

A Guide to ITIL® Intermediate level courses

Qualification Learning Objectives

This qualification provides a complete management-level overview of Service Operation including all its related activities.

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Introduction to Service Operation
- Service Operations Principles
- Service Operation Processes
- Common Service Operation Activities
- Organizing Service Operation: Functions
- Technology Considerations
- Implementation Considerations
- Challenges, Critical Success Factors and Risks
- Coordinate and carry out the actions and processes required to deliver and manage services at agreed levels to business users and customers as well as the responsibility for the ongoing management of the technology that is used to deliver and support services.

Note: Please be aware that the course covers the management and control of the activities and techniques within Service Operation, but does NOT cover the detail of each of the supporting processes.

CONTINUAL SERVICE IMPROVEMENT

Syllabus at a Glance:

Learning Unit CSI01: Introduction to Continual Service Improvement

- The Service Gap Model, how Service Level Management contributes to the management of gaps and how a Service Improvement Programme can be utilized
- The 7-Step Improvement process used in the Continual Service Improvement
- The processes and service lifecycle stages that Continual Service Improvement interfaces with
- The fundamental aspects of Continual Service Improvement and be able to define them

Learning Unit CSI02: Continual Service Improvement Principles

- How Service Level Management supports Continual Improvement, providing details and examples related to use of Service Level Agreements, Operational Level Agreements and Underpinning Contracts
- How the complete Deming Cycle works and how it can be applied to a real world example
- What role benchmarking plays in Continual Service Improvement and the interaction it has with governance
- What situations require the use of frameworks and models and examples how each type can be used to achieve improvement

Learning Unit CSI03: Continual Service Improvement Process

- What the 7-Step Improvement process is, how each step can be applied and the benefits it produces
- The use and interaction of all other lifecycle stages and activities that contribute to Continual Service Improvement
- The benefits and differences between the types of metrics (i.e. Technology, Process and Service) and how each is used to support Continual Service Improvement
- The differences between the Technology Domain and the Service Management Domain, and how each is viewed by Continual Service Improvement

Learning Unit CSI04: Continual Service Improvement Methods and Techniques

- How Availability Management techniques such as Component Failure Impact Analysis, Fault Tree Analysis are used to support Continual Service Improvement
- How Capacity, Problem, Risk and IT Service Continuity Management can all be used holistically to support Continual Service Improvement
- When and where to use benchmarking, Balanced Scorecards and SWOT (Strength, Weakness, Opportunity, Threat) analysis

Learning Unit CSI05: Organization for Continual Service Improvement

- How to design, implement and populate a RACI (Responsible, Accountable, Consulted, Informed) diagram as well as how to use it to support Continual Service Improvement
- The Continual Service Improvement related roles and responsibilities such as Service Manager, Continual Service Improvement Manager and Service owner and provide examples of how they can be positioned within an organization

Learning Unit CSI06: Technology for Continual Service Improvement

- The technology and tools required, as well as, how these would be implemented and managed, to support Continual Service Improvement activities such as Performance, Project and Portfolio Management as well as Service Measurement and Business Intelligence reporting

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Learning Unit CSI07: Implementing Continual Service Improvement

- Continual Service Improvement implementation: Strategy, planning, governance, communication, project management, operation as well as how to deal with cultural and organizational change
- The day-to-day concerns, support and operations of a large corporate Continual Service Improvement group

Learning Unit CSI08: Critical Success Factors and Risks

- The challenges and risks such as staffing, funding, management, etc., which can be related to Continual Service Improvement and the details behind how each challenge can be addressed
- The Critical Success Factors related to Continual Service Improvement as well as how to measure and monitor them

Qualification Learning Objectives

This qualification presents a complete overview of Continual Service Improvement including all its related activities: Continually align and realign IT services to changing business needs by identifying and implementing improvements to IT services that support business processes. This qualification reviews improvement activities as they support the lifecycle approach through Service Strategy, Service Design, Service Transition and Service Operation.

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- • Introduction to Continual Service Improvement
- • Continual Service Improvement Principles
- • Continual Service Improvement Process
- • Continual Service Improvement Methods and Techniques
- • Organization for Continual Service Improvement
- • Technology for Continual Service Improvement
- • Implementation Considerations
- • Critical success factors and risks

Note: Please be aware that the course covers the management and control of the activities and techniques within Continual Service Improvement, but does NOT cover the detail of each of the supporting processes.

ITIL® V3 'MANAGING ACROSS the LIFECYCLE'

YOU MUST HAVE AT LEAST 17 CREDITS TO BE ELIGIBLE TO ATTEND THIS COURSE AND TO TAKE THE EXAMINATION.

This course presents the end-to-end view of Management and utilizes all the lifecycle and capabilities activities related to IT Service Management Business and Managerial Issues, Managing the Planning and Implementation of IT Service Management, Management of Strategic Change, Risk Management, Managerial Functions, Organizational Challenges, Project Assessment and Complementary Industry Guidance.

Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL® Foundation Certificate in IT Service Management (2 credits from the V3 Foundation or V2 Foundation plus Bridge Certificate) and have obtained a further 15 credits (a total of at least 17 credits) as a minimum from a balanced selection of ITIL® Service Lifecycle or Service Capability qualifications. Documentary evidence of this must be presented to gain admission to this certification level.

Eligibility for Examination

To be eligible for the ITIL® Qualification: Managing Across the Lifecycle examination, candidates must have fulfilled the following requirements:

- At least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organisation (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- Hold the ITIL® V3 Foundation Certificate in IT Service Management or ITIL® V2 Foundation plus the bridging certificate
- Have obtained a minimum of 15 credits through formal Service Lifecycle Stream or Service Capability scheme qualifications.
- It is also recommended that candidates should complete at least 28 hours of personal study by reviewing the syllabus and the core Lifecycle publications in preparation for the examination

Format of the Examination

The exam comprises eight (8) multiple choice, scenario-based, gradient scored questions.

Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.

The duration of the examination is a maximum 90 minutes for all candidates in their respective language.

Provisions for additional time for candidates completing an exam:-

- in a language that is not their mother tongue, and
- in a country where the language of the exam is **not** a business language in the country,

They have a maximum of 120 minutes to complete the exam and are allowed the use of a dictionary.

The exam is 'closed book' with no reference to any documentation (dictionary excepted)

The pass score is 28/40 or 70%

MANAGING ACROSS the LIFECYCLE'

Syllabus at a Glance:

Learning Unit MALC01: Introduction to IT Service Management Business and Managerial Issues

- Open-loop and closed-loop, when/where to apply each system
- ITSM Monitor Control loops and Complex Monitor Control loops including how/when the control loops are used
- The benefits and business value in relation to people, process and function, supplier relationships and technological alignment

Learning Unit MALC02: Management of Strategic Change

- Value creation and critical success components of managing strategic change
- Introduce strategic change supported by a business case that defines the business benefits and the benefits realization strategy
- Tangible/intangible business benefits and models for measuring each type of benefit
- Business Value enhancement through Variable Cost Dynamics and alignment of business policy
- IT and Business alignment through Demand Management, service portfolios and service catalogues

Learning Unit MALC03: Risk Management

- Risk within the IT and Business relationship and models for effective evaluation, analysis and identification of Risk
- Management of Risk in the following areas: Service Providers, Contracts, Design, Operations and Markets
- Analysis of Business and IT related Risks as measured by specific critical success factors and the Corrective Actions and/or Transfer of Risks

Learning Unit MALC04: Managing the Planning and Implementation of IT Service Management

- The Deming cycle ("Plan, Do, Check, Act")
- IT Service Management implementation strategy including policy, strategy, design and transition considerations
- Directing, controlling and evaluating – achieving business goals and using feedback
- Communication, Coordination and Control activities when implementing IT Service Management

Learning Unit MALC05: Understanding Organizational Challenges

- Organizational maturity and organizational structure
- Governance models and achieving and maintaining balance in Service Operations
- Organizational transition

Learning Unit MALC06: Service Assessment

- Service assessment measurements, metrics and monitoring
- The value of benchmarking
- Service Portfolio Assessments and corrective actions

Learning Unit MALC07: Understanding Complementary Industry Guidance and Tool Strategies

- COBIT, ISO/IEC 20000, CMMI, Balanced Scorecard, Quality Management, OSI Framework, Annuity, Service Management maturity framework, Six Sigma, Project Management, TQM, Management Governance framework, and tool strategies

A Guide to ITIL® Intermediate level courses

Qualification Learning Objectives

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Introduction to IT Service Management Business and Managerial Issues
- Managing the Planning and Implementation of IT Service Management
- Management of Strategic Change
- Risk Management
- Understanding Organisational Challenges
- Service Assessment
- Understanding Complementary Industry Guidance

CONTACT DETAILS FOR *Opsys*

This document is based on information taken from the official syllabi published by APMG, the official ITIL® accreditor.

All courses offered by Opsys are accredited by the ISEB, part of the British Computer Society.

For more information please have a look at our web site www.opsys.be

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