

# ITIL® V3 Service Offerings and Agreements (SOA) Certification Program - 5 Days

## Program Overview

The ITIL® Intermediate Qualification: Service Offerings and Agreements (SOA) Certificate, although a stand alone qualification, yet is also part of the ITIL® Intermediate Capability stream, and one of the modules that leads to the ITIL® Expert in IT Service Management Certificate.

The ITIL® Certificate in Service Offerings and Agreements is intended to enable the course participants to apply the ITIL® best practices during the Service Management Lifecycle.

The course approach combines theoretical and hands-on knowledge transfer, including individual and group practical exercises.

- ➔ Note: The success in achieving this certification is highly dependent upon participants' effort in doing their homework, and self-study before and during the program. Therefore, it is highly recommended that:
  - ➔ The exam is scheduled one week to maximum two weeks after the training to allow sufficient time for preparation.
  - ➔ Course participants purchase the appropriate OGC publication to complete at a minimum 12 hours of personal study by reviewing the syllabus and the pertinent areas of the ITIL® Service Management Practice core guidance.

## Duration

This program is offered over a 5-day period and includes approximately 35 hours of student-instructor interaction; a 1.5 hours formal certification exam on the afternoon of the fifth day, or the following week. The Minimum number of students per session is 6 where the maximum is 12.

The course approach combines theoretical and hands-on knowledge transfer, including individual and group practical exercises. The Minimum number of students per session is 6 where the maximum is 12.

## Delivery Methods

- Instructor led Classroom based
- Virtual Web based

## **Audience**

The target group of the ITIL® Expert Qualification Service Offering and Agreement is:

- Individuals who require a deep understanding of ITSM/ITIL® Service Offerings and Agreement processes and how it may be used to enhance the quality of IT service support within an organization.
- IT professionals that are working within an organization that has adopted and adapted ITIL® who need to contribute to an ongoing service improvement program
- Operational staff involved in Service Portfolio Management; Service Catalogue Management; Service Level Management; Demand Management; Supplier Management; Financial Management and Business Relationship Management who wish to enhance their role-based capabilities.
- This may include but is not limited to, IT professionals, business managers and business process owners.

## **Prerequisites**

- Individuals who have attained and have a proof of one of the following certifications:
  - V3 ITIL® Foundation certificate in Service Management; OR
  - V2 Foundation plus the V3 Foundation Bridge certificate;

It is also strongly recommended that course participants:

- Possess 2 to 4 years professional experience working in IT Service Management
- Have exposure working in the service management capacity within a service provider environment, with responsibility emphasizing on at least one of the following management processes:
  - Service Portfolio Management
  - Service Catalogue Management
  - Service Level Management
  - Demand Management
  - Supplier Management
  - Financial Management

## **Content and Objectives**

Through a series of lectures designed at achieving a clear understanding of the ITIL® Best Practice lifecycle approach and through various exercises, assignments and discussions, participants will gain the necessary knowledge enabling them to capture:

- Service Management as a Practice
- Processes across the Service Lifecycle pertaining to the Service Offerings and Agreement curriculum, such as:
  - Service Portfolio Management which provides documentation for services and prospective services in business terms
  - Service Catalogue Management which is concerned with the production and documentation of the Service Catalogue from a business and a technical viewpoint

- Service Level Management which sets up a Service Level Agreement (SLA) structure and ensures that all SLAs have an underpinning support structure in place
- Demand Management which identifies Patterns of Business Activity to enable the appropriate strategy to be implemented
- Supplier Management which ensures all partners and suppliers are managed in the appropriate way and includes contract management
- Financial Management which includes ensuring understanding of the service value and the management of all financial considerations
- Business Relationship Managers who have responsibility to represent customers and ensure the Service Catalogue and Portfolio have the right needs
- Operational activities of processes covered in other Lifecycle phases such as Incident and Change Management

In addition, candidates will gain an understanding and the ability to describe:

- the concept of Service Management as a practice
- the concept of Service, its value proposition and composition
- the functions and processes across the Lifecycle
- how service management processes are defined, and how they can be applied across the Service Lifecycle with different perspective
- how Service Management creates business value
- scope of the SOA, its value to the business and how the SOA processes interact with processes within other Lifecycle stages.

***The program will cover the following modules:***

### ***Introduction***

This module introduces the candidate to the concepts and terminology of the Service Lifecycle and the role of SOA within the Lifecycle, where the course participants will have the ability to capture, understand and describe:

- the concept of Service Management as a practice
- the concept of Service, its value proposition and composition
- the functions and process across the Lifecycle
- the role of Processes in the Service Lifecycle
- how Service Management creates business value
- how the processes within the Service Offerings and Agreement curriculum supports the Service Lifecycle

### ***Service Portfolio Management***

This module covers the Service Portfolio Management (SPM) process, its components and deliverables, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the Service Portfolio and illustrate its relationship with the Service Catalogue and Service Pipeline
- how a Service Portfolio describes a provider's service and how it relates the business service with the IT service.
- the Service Portfolio Management methods

### ***Service Catalogue Management***

This module covers the Service Catalogue Management process and how it is integrated with the Service Portfolio, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the purpose, goal and objectives of the process
- the scope of the process
- the interface to the Service Portfolio
- the difference between a Business and a Technical Service Catalogue
- the importance of the Service Catalogue to the Service Lifecycle and the business
- its policies, principles and basic concepts
- the use of key metrics, challenges, critical success factors and risks associated with the process
- the process including the utilization of the Service Catalogue by other processes and functions
- produce a Service Catalogue

### ***Service Level Management***

This module covers the Service Level Management process and deliverables, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the purpose, goal and objectives of the SLM
- the scope of the SLM
- the importance of the process to the Service Lifecycle and how its generate business value
- the principles and basic concepts
- the main activities, methods and techniques of this process and how it relates to the Service Lifecycle. This includes the SLA structures and determining Service Level Requirements
- the process deliverables
- monitoring of service performance against SLAs
- the use of key metrics, challenges, critical success factors and risks associated with the process
- the contents of SLAs, OLAs and review meetings
- the interfaces to other processes and functions

### ***Demand Management***

This module covers the Demand Management process and how it contributes to Service Offerings and Agreements, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the basic concepts of the process
- activity based Demand Management and business activity patterns
- the interfaces to Service Portfolio
- Managing demand for Service

### ***Supplier Management***

This module covers the use of the Supplier Management process and the interfaces and dependencies of the process, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the purpose, goal and objectives of the process
- the scope of the process
- the importance of the process to the Service Lifecycle and how they generate business value
- the principles and basic concepts
- the main activities, methods and techniques of this process and how it relates to the Service Lifecycle including evaluation of new suppliers
- the use of Supplier Categorization and maintenance of the Supplier Database
- the use of key metrics, challenges, critical success factors and risks associated with the process
- the inputs and outputs of the process

### ***Financial Management***

This module covers how Financial Management contributes to the Service Lifecycle Operation and the basic principles of Service Economics, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the purpose, goal and objectives of the process
- the scope of the process
- the concepts of Service Valuation
- the importance of the process to the Service Lifecycle and how they generate business value
- the various aspects of the process and the basic concepts - funding, accounting and chargeback
- Return on Investment and the business case
- the main activities, methods and techniques that enable this processes and how it relates to the Service Lifecycle
- Design and Implement a Financial Management process

### ***Business Relationship Manager***

This module covers the role of Business Relationship Manager, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- the role of Business Relationship Managers

### ***Service Offerings and Agreement Roles and Responsibilities***

This module covers how Service roles and responsibilities contribute to Service Offerings and Agreement, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:

- key roles and responsibilities of the Service Catalogue Manager
- key roles and responsibilities of the Service Level Manager
- key roles and responsibilities pertaining to the Supplier Manager

### ***Technology and Implementation Considerations***

This module covers technology implementation as part of implementing service management process capabilities, and what special technology functions and features are related to Service Offerings and Agreement practices, where the candidates will be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:.

- the generic requirements for technology to assist Service Offerings and Agreements
- the evaluation criteria for technology and tooling for process implementation
- the good practices for practice and process implementation
- the challenges, Critical Success Factors and risks related to implementing practices and processes
- how to plan and implement Service Management technologies

### ***Summary, Exam Preparation and Directed Studies***

This module summarizes the material covered in the previous modules and prepares candidates for the examination through the review and practice of a mock examination. The Examination is comprised of eight (8) multiple choice, scenario-based, gradient scored questions. The standard duration of the exam is Maximum 90 minutes.

## **Program Material**

This training program includes the following as reference documentation:

- Program slide presentation
- ITIL® V3 acronyms and glossary
- Sample examination questions and answers

## **Simulation and practical application**

- We provide the students with real life experiences; we use the client organization as “Case study” example for the purpose of discussion to show the value of using best practice. We integrate group exercises and sample exam questions to simulate and practice the subject matter.