

SELF-STUDY GUIDE

# ITIL®4 SPECIALIST: CREATE, DELIVER AND SUPPORT



ITIL®4



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- ITIL® Foundation (ITIL® 4 edition)
- ITIL® 4 Specialist: Drive Stakeholder Value
- ITIL® 4 Specialist: High Velocity IT
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# Contents

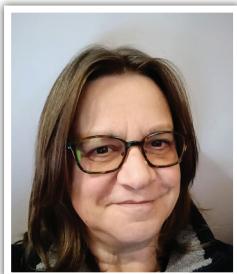
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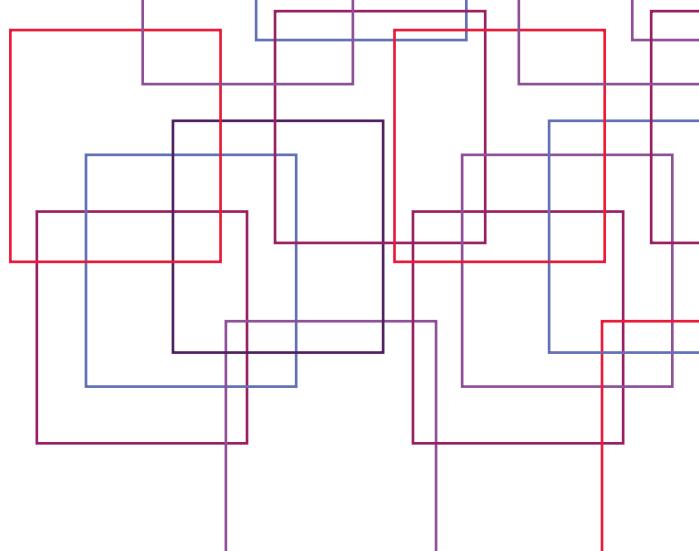
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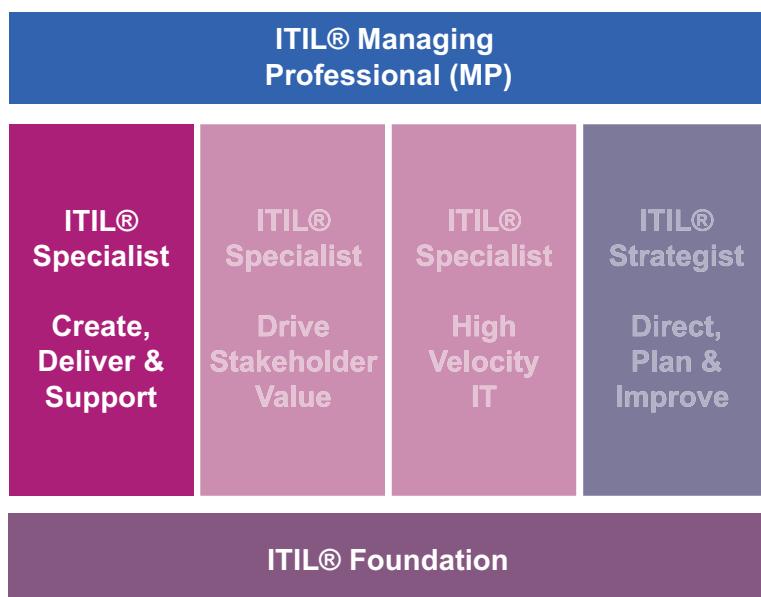
# Introduction



## Overview

The ITIL® 4 Specialist: Create, Deliver and Support module is part of the ITIL 4 Managing Professional stream and you need to pass the related certification exam for working towards the ‘Managing Professional’ (MP) designation.

ITIL 4 Create Deliver and Support covers the integration of a number of proven areas of what we might know as ‘IT’ areas of work – from design, to build and test, launch, run and support of products and services.



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The ITIL® 4 Specialist: Create, Deliver and Support course provides information and guidance across a number of areas that are required to build and maintain a broad ‘professional’ portfolio – collaboration, strong and positive culture, integrated teams and employee satisfaction.

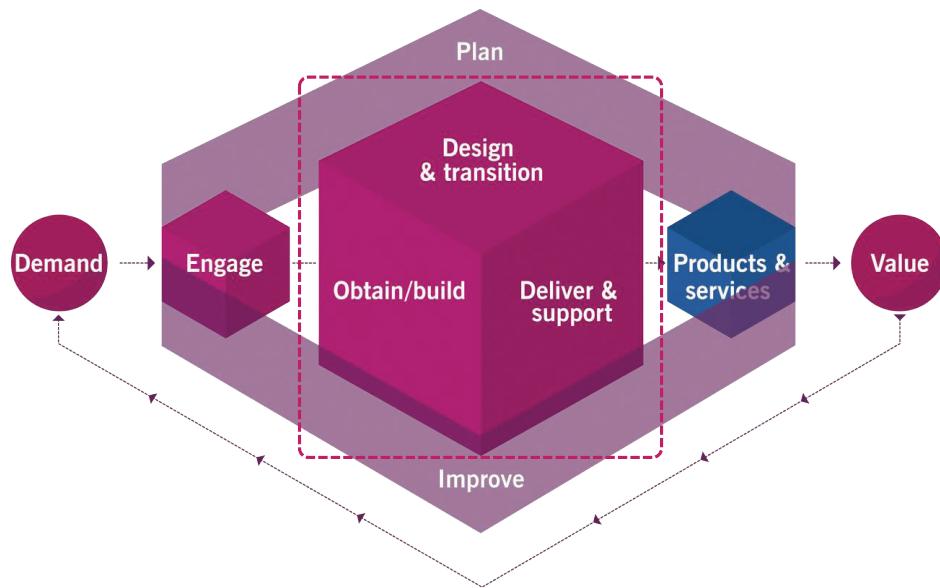
This course provides an understanding on how to integrate different value streams and activities to create, deliver, and support IT-enabled products and services. It specifically focuses on two value streams:

- Value stream for a new service
- Value stream for user support

The course also discusses the techniques to prioritize work and methods to manage work.

## ITIL 4 Create, Deliver and Support and Service Value Chain

The following figure depicts how the Create, Deliver and Support module maps to the ITIL service value chain. The Create, Deliver and Support aligns with the middle part of value chain, which is about creating, delivering and supporting services. The service value activities that are closely associated with Create, Deliver and Support module are Design & Transition, Obtain/Build and Deliver & Support.



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## Key Audience

The target audience for Create, Deliver and Support includes, but are not limited to, the following:

- Service management practitioners involved at any stage of product and service lifecycles
- Team leads and middle management of service providers
- Service and product owners
- People currently known as process owners and managers

Professionals with following job titles are expected to benefit from this module:

- IT Operations Manager, Availability Manager, Service Desk, Service Managers, Service Architects, Security Manager, Technology Support teams, UX/UI Designer, Development Managers, Developers, Testers, Infrastructure Operations Engineer, Software Developer
- Product owners, Project Managers, Business Relationship Manager, Customer Relationship Manager

## ITIL® 4 Specialist: Create, Deliver and Support Course

### Overview

The ITIL® 4 Specialist: Create, Deliver and Support course is based on the ITIL® 4 Specialist: Create, Deliver and Support exam specification from AXELOS. With the help of ITIL® 4 concepts and terminology, exercises, and examples included in the course, you will acquire relevant knowledge to pass the ITIL® 4 Specialist: Create, Deliver, and Support certification exam.

The ITIL® 4 Specialist: Create, Deliver and Support course reflects new ways of approaching service management. The course is designed to provide practitioners with both theoretical and practical knowledge of the ITIL 4 holistic approach to building and modifying technology-enabled services from demand to value. This course describes how value streams can be built and managed holistically and how continual improvement iterations and feedback loops can be included in value streams. The course explores areas such as development, testing, knowledge, customer and employee feedback, new technologies, sourcing, and ways of managing work.

The course provides guidance on how to collaborate and coordinate efforts to design, build, and support integrated and effective products and services, building from ITIL Foundation.

## Learning Outcomes Covered in the Course

The ITIL® 4 Specialist: Create, Deliver and Support course covers the content in relation to the following learning outcomes of the exam specification for ITIL 4 Managing Professional Transition module:

1. Understand how to plan and build a service value stream to create, deliver, and support services
2. Know how relevant ITIL practices contribute to the creation, delivery and support across the SVS and value streams
3. Know how to create, deliver and support services

## Structure of the Course

The ITIL® 4 Specialist: Create, Deliver and Support course includes 8 modules. These modules can be considered to be part of a logical structure comprising three sections:

- **Section 1:** Critical Success Factors of ITSM Excellence
  - Module 1: Organization and Culture
  - Module 2: Effective Teams
  - Module 3: Information Technology to Create, Deliver and Support Services
- **Section 2:** Value Streams to Create, Deliver and Support Services
  - Module 4: Value Streams
  - Module 5: Value Stream to Create, Deliver and Support Services
  - Module 6: Value Stream for User Support
- **Section 3:** Managing Work and Sourcing Considerations
  - Module 7: Prioritize and Manage Work
  - Module 8: Commercial and Sourcing Considerations

The first three modules provide guidance for professionals in IT and service management to build and maintain a broad professional portfolio. The content of these three modules relates to organizational structures, people, communications, information and technology, and the importance of being aware of new opportunities. These particular areas are emphasized in ITIL 4 because they are as important for success as processes, practices, and technical knowledge.

The next three modules – Module 4 to Module 6 – provide guidance on understanding how work flows across the organization and how this flow can be reflected through value streams.

The last two modules – Module 7 and 8 - provide guidance about strategies for managing work, techniques for prioritization, and commercial and sourcing considerations.

## Course Components



## Case Study: Axle Car Hire

The case study, Axle Car Hire, is intended to show how an organization transforms itself and meet new challenges using the guidance provided by ITIL 4 with regard to organizational structures, people, communications, information and technology and value streams.

The case study demonstrates how an organization tries to make its services as effective as possible, by using the best combination of their people, their teams, their technology, their value streams, and their ways of working.

Driven by Difference...



The introduction to the case study is provided in the appendix.

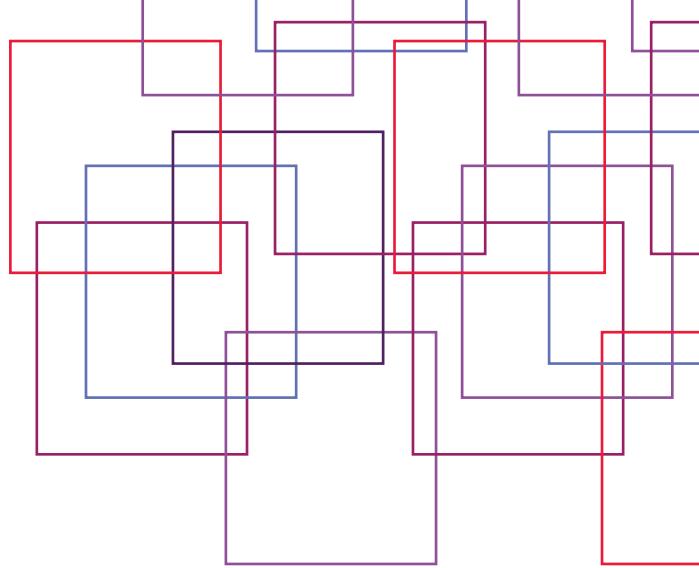
## Exam Details

- **Bloom Level:** 2 and 3
- **Exam Format:**
  - Close Book format
  - Web-based and paper-based

- **Questions:** 40 Multiple Choice Questions (MCQs) of 1 mark each
- **Passing Score:** 70% (28 marks out of 40)
- **Exam Duration:**
  - 90 minutes
  - 25% extra time for non-native English speakers (113 minutes in total)
- **Proctoring:** Live/Webcam

After completing this training, you will be planning to take the ITIL® Specialist Create, Deliver, and Support certification exam. To give you an idea about the certification exam, sample paper (or mock exam) is included within the course.

# 1



## ORGANIZATION AND CULTURE

### Module Objectives

At the end of this module, you will be able to:

- Understand the changes in organizational structure and use of ITIL guiding principles to improve the organizational structure.
- Understand the characteristics of good team culture.
- Understand the benefits and challenges of continual improvement culture.
- Understand the difference between collaboration and cooperation and their purpose in an organization.
- Understand the importance of customer-oriented mindset.
- Understand the importance and principles of good communication.

This module is based on the following assessment criteria of the exam specification:

- Understand the concepts and challenges relating to the following across the service value system:
  - a) Organizational structure
  - b) Integrated/collaborative teams
  - c) Team culture and differences
  - d) Working to a customer-orientated mindset
  - e) The value of positive communications

- Know how to plan and manage resources in the service value system:
  - a) Team collaboration and integration
  - b) The culture of continual improvement

## Intent and Context

This module focuses on the key areas required to build effective teams and collaborative culture.



This module focuses on a number of areas that are required to build effective team culture that aligns with the organization culture. Culture is a critical factor in the creation, delivery, and support of products and services. This module focuses on how to develop and nurture good team culture and collaborative organizational culture, which is supported by customer orientation and positive communication.

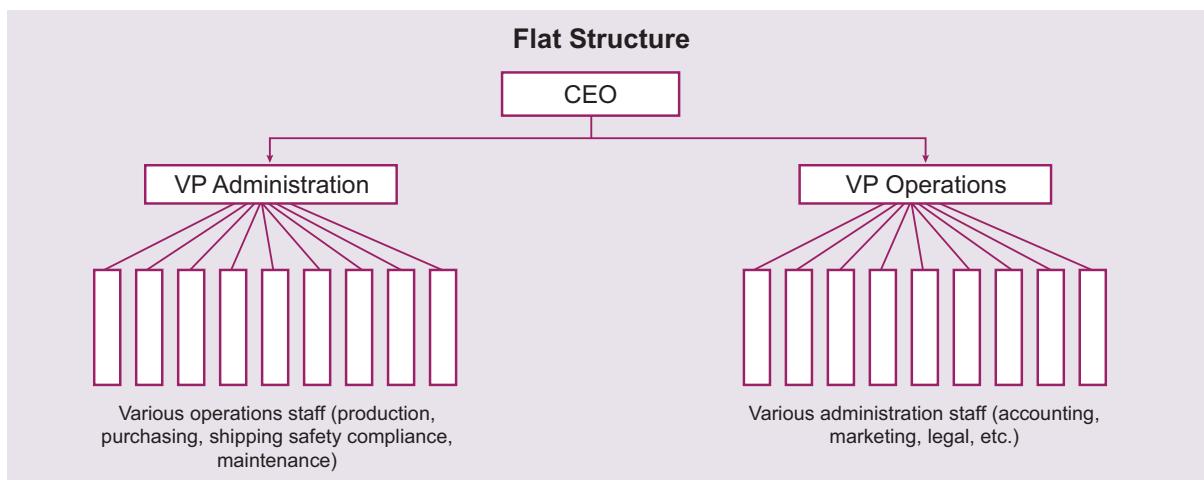
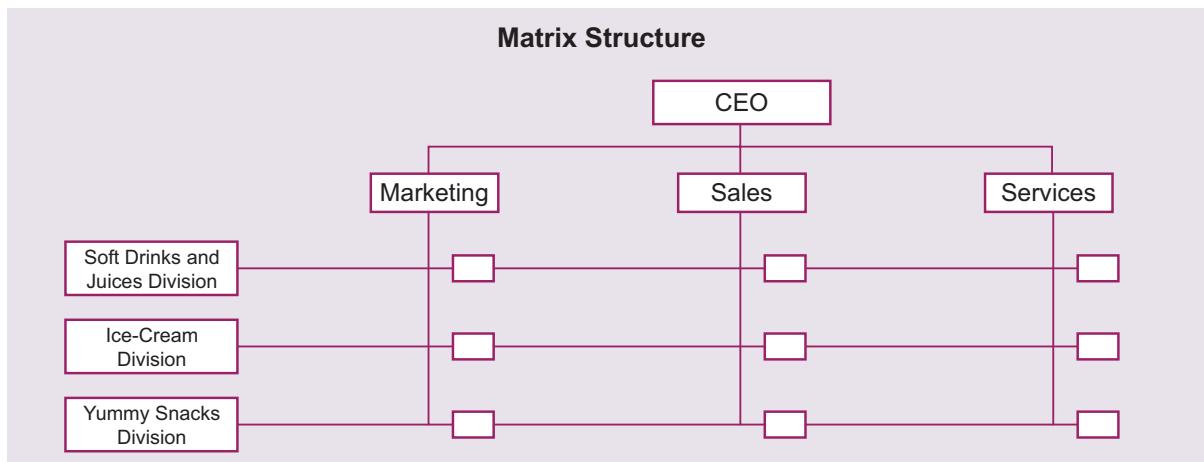
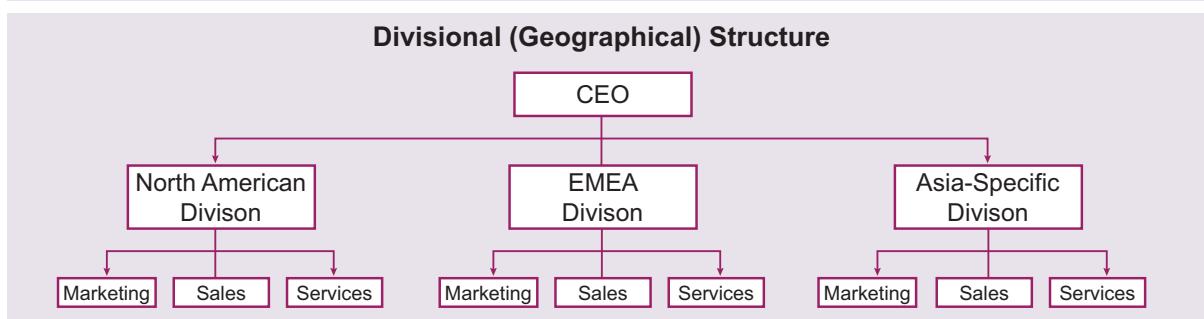
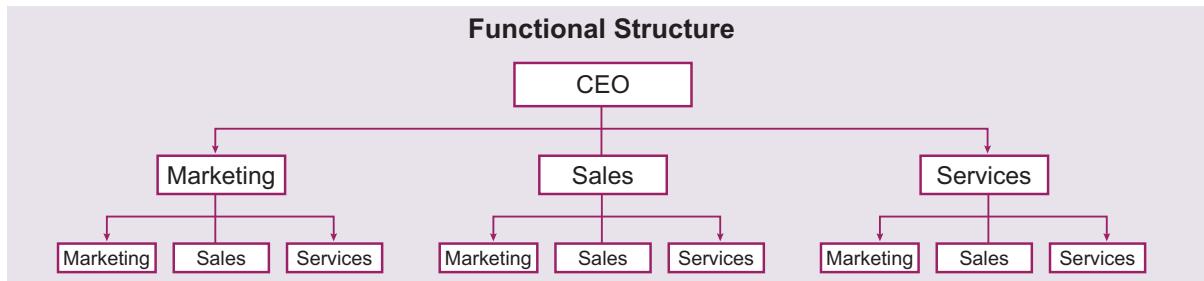
## Module Topics

- Organizational Structures
- Team Culture
- Continual Improvement Culture
- Collaborative Culture
- Customer-Oriented Mindset
- Positive Communication

## ORGANIZATIONAL STRUCTURES

### Traditional Organizational Structures

There are various types of organizational structures used across all organizations. These different organizational structures vary significantly in approach.



In order to improve and build effective new ways of working and to successfully drive change and improvement, it is essential to understand how an organization is structured and how it currently operates. Traditionally, organizational structures have generally been functional and hierarchical in nature, with military style lines of command and control. In such structures, a defined leader sits at the top of the organization with various subordinates and sub levels underneath. Some high-level examples of structures of organizations include functional, divisional, matrix, and flat.

### **Functional Structure**

The functional structure typically represents hierarchical arrangements of lines of authority and how work is managed across different management levels. With this structure, the organization may be divided into different groups based on functional areas such as marketing, human resources, and IT.

### **Divisional**

Organizations with divisional structures arrange their activities around market, product or geographical groups. Each division may have its functional units, such as sales, marketing, electronics and profit and loss accounting.

### **Matrix**

In a matrix structure, reporting relationships are set up as a grid or matrix with pools of people who can move across teams as needed. In this structure, the employees often have dual reporting relationships - generally to both a functional manager and a product manager.

### **Flat**

The flat structure aims to remove hierarchies of authority and management. This structure can be useful to remove barriers of decision making that can slow down progress. However, as organizations grow and more teams are required to manage specific responsibilities, this structure can become challenging to maintain.

The key differences between the various organizational structures can be described using the following characteristics:

- Grouping/teaming criteria, such as function, product, territory, or customer.
- Location, such as co-located or distributed
- Relationships with value streams, such as responsible for specific activities or fully responsible for the end-to-end value stream
- Team members' responsibility and authority, such as command-and-control or self-driven teams
- Sourcing of competencies, such as level of integration with teams external to the organization

## **Contemporary Organizational Structures**

In the digital service economy, agility and resilience are vital for an organization's success. Organizations must adopt new ways of

structuring their resources and competencies by following common approaches, such as two approaches described here.

- Faster and more flexible allocation of resources to new or more important tasks. For example, matrix organization structure often allocate or reallocate resources to different value streams, projects, products, or customers.
- Permanent, simple multi-competent teams that are assigned to work exclusively on a product. This may result in circumstances when teams are idle, but it ensures a high availability of resources for the development and management of products.

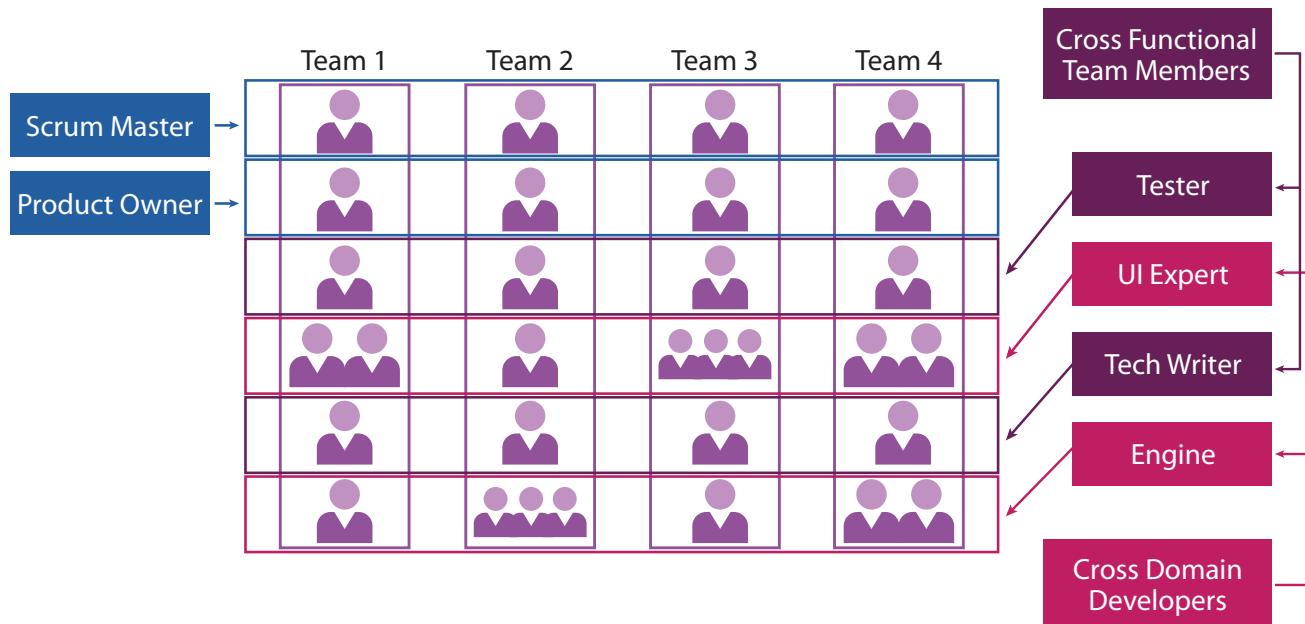
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Adoption of flexible and responsive ways of working, such as Agile and DevOps, have led to adoption of new approaches to organizational structure, which is more servant and cross-functional. This type of structure generally involve applications of matrix and flat structures.



### TIPS

In order to allow teams to work in a cross-functional and collaborative fashion, the organization has to align their goals. This usually means aligning the organizational structure with the desired team structure, as observed by the proverb known as Conway's Law. "Organizations which design systems...are constrained to produce designs which are copies of the communication structures of these organizations." – Melvin Conway



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The Agile and DevOps approaches requires cross-functional, autonomous teams by applying matrix and flat structures. There is a pool of resources that include people with different specialization, who can be assigned and re-assigned to different teams without delays of recruitment, on-boarding and training.

It also involves creating cross-functional teams, which can be achieved by applying matrix and flat structures. The formation of organizational structure based on cross-functional teams can be a major change and may involve challenges as this requires an organization to transition from functional and hierarchical models of working to a more fluid and in some cases potentially conflicting areas of responsibility and management.



### Think About It

#### Adoption of Agile or DevOps Teams

**Focus:** In order to adapt to more flexible and responsive ways of working, such as agile and DevOps, many organizations have adjusted their organizational structure.

Has your organization adopted the organization structure based Agile or DevOps Teams? How has this adoption affected the organization structure?

What are the advantages and disadvantages of organization structure with cross-functional, autonomous teams?

## Axle Car Hire Example

### Case Study Example: Cross-Functional Teams

**Henri:** At Axle Car Hire, we focus on developing cross-functional teams to develop or modify products and services. This helps to gather requirements from the different functional areas at the same time. For the biometric technology, Su suggested to introduce biometric technology to identify our customers. Marco suggested the use of fingerprint or facial recognition scans to quickly identify our customers and automate the car collection and return process. Radhika suggested about considerations for regulations such as GDPR and risks to data security.

Cross-functional teams enables collaboration to define, design, and deliver new features. Team members would learn of the new services at the same time and would begin working on estimates together.

## Servant Leadership

Servant leadership is a model where managers support people in cross functional teams to achieve organizational goals.

The servant leadership style of leadership is based on two key principles:

- Managers are there to meet the needs of the organization, first and foremost (not just their individual teams).
- Managers are there to ‘serve’ and support the people working for them by ensuring that they have the relevant resources and organizational support to get their jobs done.

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Servant leadership can often be seen in flat, matrix, or product-focused organizations. However, this approach can be applied to any organizational structure. The servant style of leadership inspires individuals to collaborate with the leader to become more cohesive and productive. The servant leadership style inspires teams to collaborate and utilize the help of the leader to become more cohesive and productive.

## Using ITIL Guiding Principles to Improve the Organizational Structure

"If you're thinking of moving to a cross-functional servant model, use the ITIL guiding principles to help you decide. This will involve major organizational and cultural change."

The ITIL 4 guiding principles are a useful reference point when planning to change and improve the organizational structure.

Guiding Principle	Considerations to Improve Organizational Structure
Focus on value	Ensure that the key driver for changing the way of working is reviewed and referenced during each stage of the transformation.
Progress iteratively with feedback	Ensure that the transition/transformation is simplified into manageable steps.
Start where you are	Consider the cultural aspects and current roles and responsibilities of the organization. For example: <ul style="list-style-type: none"> <li>■ Consider the relative maturity and understanding of the organizational structures in relation to the current organization.</li> <li>■ Use value stream mapping and a RACI matrix to understand the organization's current roles and responsibilities.</li> </ul>
Collaborate and promote visibility	Ensure that all stakeholders are engaged throughout the change process. Adopt a 'disagree and commit' approach to involve every stakeholder to discuss concerns and disagreements.  Ensure leaders are easily accessible by adopting an 'open door' policy.  Organizational changes must be clearly defined and openly discussed in order to enable transparency.
Think and work holistically	Ensure collaboration with all appropriate leaders/managers to build a single consistent message on the risks and progress.
Keep it simple and practical	Reduced complexity of the organization can help to ensure that the: <ul style="list-style-type: none"> <li>■ Flow of work and information is uninhibited.</li> <li>■ Transfers of work is reduced to improve efficiency and effectiveness.</li> <li>■ Teams can be encouraged to be self-organizing by making decisions and taking actions within certain criteria, without the need to check with management.</li> </ul>
Optimize and automate	Where possible, consolidate or automate any tasks to reduce waste. Consider the key principle that 'human intervention should only occur when it contributes a defined value.'

## TEAM CULTURE

### Team Culture

A team culture is made up of the values, beliefs, attitudes and behaviours shared by a team.

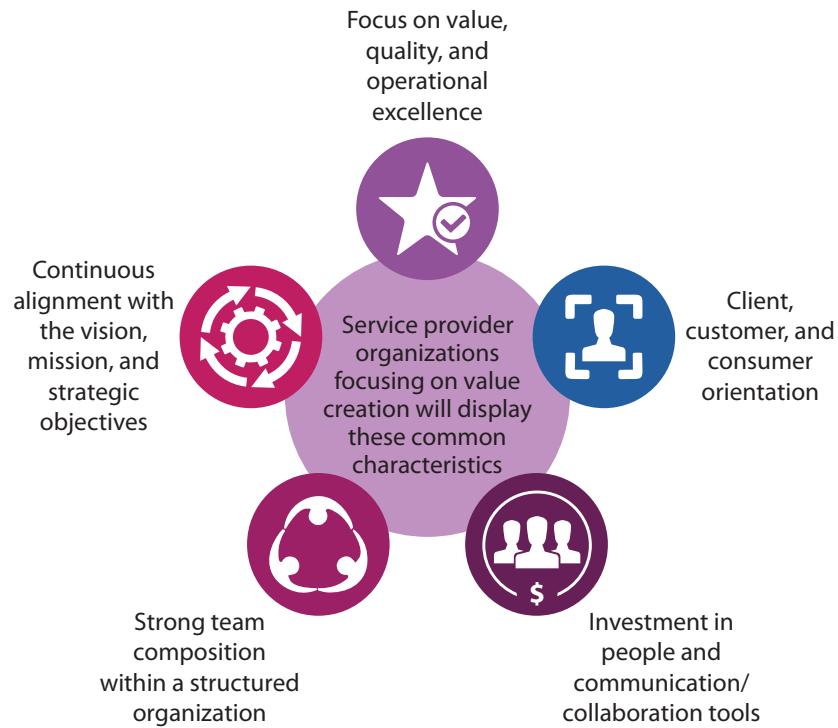
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Team culture reflects how people work together towards a common goal and how they treat each other. In an effective team culture, members recognize the work of their team in the context of their organization's strategic plan and success goals. Teams understand where their work fits in the total context of the organization's mission, goals, principles, vision, and values. Teams feel that they are part of something bigger than themselves and tend to experience increased engagement and work satisfaction.

Team members understand why using teams will help their organization attain its business goals—and how they can attain their personal goals through effective participation. Team members also understand that some of their problems relate to how they interact and relate to each other, and that their challenge as individuals and as a team is to remove the obstacles to success.

### Culture for Service Providers

Culture provides distinguishing features to service provider and promotes its value proposition. Culture is a critical factor in the creation, delivery, and support of products and services.



These characteristics and/or similar characteristics are expected to be shared by every member and team within the organization.

However, specific team culture may be developed at team level which support the values and principles of the organization but reflect the characteristics specific to the team.



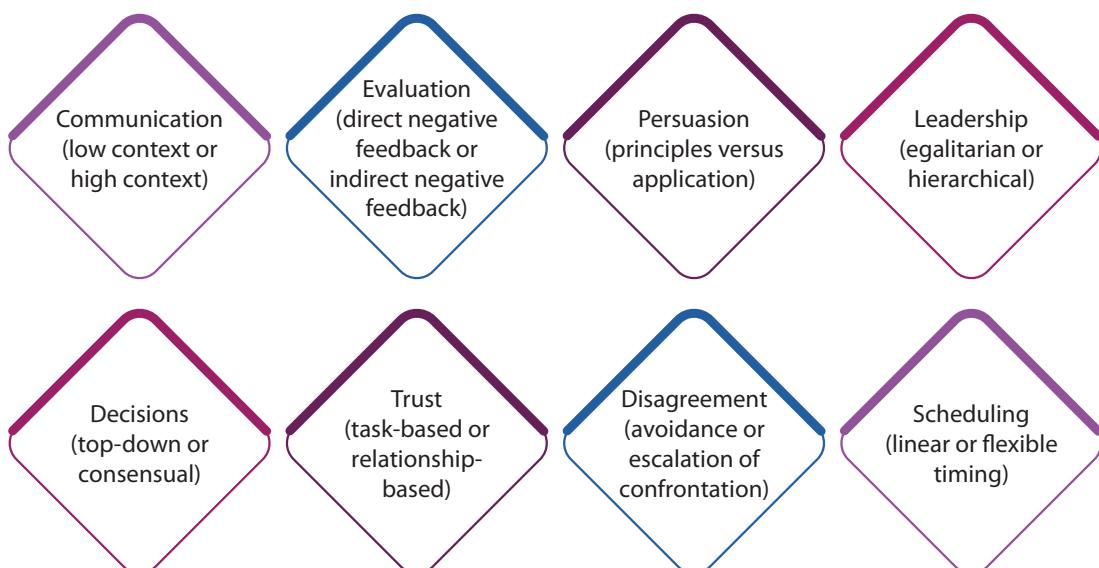
“Service provider organizations focusing on value creation will display some or all of these common characteristics:

- **Value, quality, and operational excellence focus:** These organizations are results-driven, demanding precision and consistency in the creation and delivery of products and services. They focus on innovation, growth, and maximizing potential.
- **Client, customer, and consumer orientation:** These organizations seek long-term and mutually beneficial relationships. They believe that customers are made, not obtained and that they should be invested in seriously with time, money, and organizational commitment. Satisfying the customer becomes the driver for their vision, mission, and strategic objectives.
- **Investment in people and communication/collaborative tools:** As a social process, services are associated with the ability to identify, mobilize, and focus human energy by cooperating and collaborating with stakeholders. Investment in tools which maximize collaboration and visibility is a priority for these organizations.
- **Strong team composition within a structured organization:** Combining operational excellence, client orientation, and collaboration allows these organizations to provide a strong central organizational structure while allowing for agile, solution-oriented teams to operate in a decentralized manner.
- **Continuous alignment with the vision, mission, and strategic objectives:** In order to focus on value, these organizations adapt and continually improve their products and services to serve their consumers. The focus on value is driven from the top-down: from strategy to operations and across the service value system.

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## Culture Differences

Different teams within an organization may manifest their own culture and also be influenced by the company culture. The culture differences in the organization can be described and managed by different models, including:





It takes time to built good culture in an organization. Culture is not a commodity that can be bought or built easily.

Effective organizational culture recommends that the teams understand both how they work and where their work fits within the context of the organization's mission, goals, principles, vision, and values.

Some of the recommendations for team members include:

- Team members define their team culture by agreeing upon team norms and expectations within the organization's overall culture.
- Team members should understand that a high percentage of the problems they face as a team will relate to how they interact and relate to each other.
- Team members should ensure that they have the information needed to successfully perform their defined strategy.

## Cultural Fit



“Cultural fit is the ability for an employee or team to comfortably work in an environment that is in line with their own beliefs, values, and needs.”

A good cultural fit benefits both the team member and the team.

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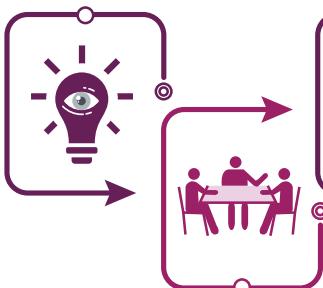
Organizations should be aware of bias when hiring cultural fit. It is easy to gravitate towards like-minded individuals with a similar personality or beliefs.

An employee that is considered a good cultural fit is more likely to enjoy their work and workplace, commit long term, and be more productive and engaged. When hiring for a good cultural fit, it is important to be conscious of bias. It is natural to incline towards like-minded people with similar personality or beliefs and this may produce homogenous teams and culture that are less likely to grow and be suitable for change and development.

Good culture is supported by a good diverse approach. Diversity is needed in teams as each experience will strengthen and add value to the team – each individual can help others with complementary experiences, perspectives, skills and capabilities.

## Guidelines for Strong Team Culture

Creating a 'bigger vision' around great team culture



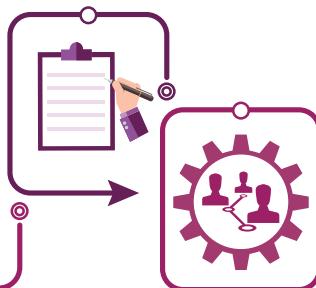
Creating leaders, more than managers



Cross-training employees



Providing feedback



Meeting regularly

Encouraging informal teams

Integrating socially

Promote a culture of learning

Evolving a positive team culture starts with identifying the current state of the team, the desired outcome, and future state that is desired for the team. Let us analyse some guidelines for a positive team culture.

### **Creating a ‘bigger vision’ around great team culture**

To belong to a team, individuals will need a desire to belong and contribute. So, it is important for any leader to clearly articulate a vision and how the team will achieve it. The ‘bigger vision’ of the team has to be continually reinforced. Team members should be encouraged to focus on the collective effort rather than focusing solely on themselves. A compelling purpose is a key element in building a strong team. Generally, this will involve a holistic view of the objectives of the overall organization, and how the work of the team supports this. Leaders should clearly articulate the vision and explain how the team will achieve it. The team members should understand how their contribution fits into the bigger picture, providing them with both a sense of purpose and of belonging.

### **Meeting regularly**

Regular meetings will build rapport, encourage productivity, and bring the importance of improving the team to the forefront. The meetings should be scheduled in advance and everyone should be made aware with the agenda before the meeting begins. These meetings should focus on discussing problems and finding the solutions; they should also be an opportunity to build relationships. The value is in having the meeting, regularly and as promised.

### **Creating leaders, more than managers**

A good team culture emphasizes mentorship over management. Cultivating leadership will play an important role in establishing the culture of the team. Team members should be mentored on how to give constructive feedback that encourages productivity. Leaders, managers, and all team members should together facilitate and participate in improvement efforts. The best way to teach leadership is through example. Good leaders give people their time, support team members clearly and patiently, and considers everyone important and believe that everyone has something to offer.

### **Encouraging informal teams**

Sometimes more work can be accomplished through informal teams than formal ones. It is useful to encourage informal teams that emerge, particularly as issues often fall across organizational reporting lines. An efficient organization involves and encourages employees to resolve problems and concerns themselves, without escalating every decision to top management.

### **Cross-training employees**

Training about others jobs helps the employees to understand how different areas of the organization work. This will enable them to make good decisions that benefit the organization as a whole, rather than

solely their own department or group. Employees should be given opportunities to learn from other people's jobs. Some organizations also use the practice of switching employees', including managers, roles on a daily, weekly or monthly basis. For example, if top executives spend a few days working on the front lines with customers or directly with your product, they will have a new appreciation for what the employees go through on the job.

### Integrating socially

It is important for everyone to spend some time to get to know people personally. People will work and support each other better if they trust and understand each other better. Developing personal relationships and getting to know people behind their work persona helps to build understanding of their strengths, weaknesses, and skills.

### Providing feedback

To help teams improve continually, proactive, constructive feedback is one of the best ways. The feedback does not need to be formal or complicated. Feedback is often more impactful when it is informal and a natural part of an ongoing dialogue. No two people are the same and The method for delivering feedback should not be the same for every person. This is another reason why it is important to develop relationships with team members; when people share trust they will take suggestions to heart from each other.

### Promoting a culture of learning

Promoting a culture of learning where every person is encouraged to continue expanding their skill sets can be done by providing access to ongoing training and personal development. The expansion of online learning has made this much easier for people to learn on their own time, at their own pace. Encouraging ongoing learning and goal achievement will help to prevent team members from becoming complacent or bored in their positions. It will also allow them to learn new skills which will add value to the team and workplace as a whole.



#### Think About It

#### Developing a Team Culture

**Scenario:** Following a merger of two organizations, the two respective IT departments are also merging. The IT Director is concerned that the different departments are wary of each other, and want to overcome a "them and us" atmosphere.

Identify few actions that help to develop a team culture.