Disciplaimers

Raise Your Hand

Pitfalls

Best Practices
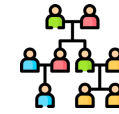
Here we go…

Running IT as a Business

🛒
Present

View

🧩
Organize

IT as a Services Organization

Customer & Client Centric

Cost Transparency

Business Value Driven

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Culture 🌍

ITIL & TBM Compliment Each Other

ITIL		Technology Business Management
Delivering high-quality IT services efficiently, improving IT service quality, and reducing downtime.		Aligning IT with business objectives to maximize value while maintaining cost efficiency.
Incident Management	»	• TBM ensures **cost transparency** by tracking the financial impact of **incidents**. • Helps organizations **allocate budgets** for proactive measures like automation and monitoring.
Change Management	»	• TBM aligns IT changes with **business priorities and cost analysis**. • Helps determine the **financial feasibility and ROI** of IT **changes**
Problem Management	»	• TBM provides **financial insights** into **recurring issues** and justifies investments in **preventative solutions**. • Helps prioritize **high-cost, high-impact problems** for resolution.
Service Delivery	»	• TBM supports **cost-efficient service delivery models** (on-premises, cloud, hybrid). • Provides **data-driven insights** into the true cost of IT services.

Culture

Getting there is **more** than
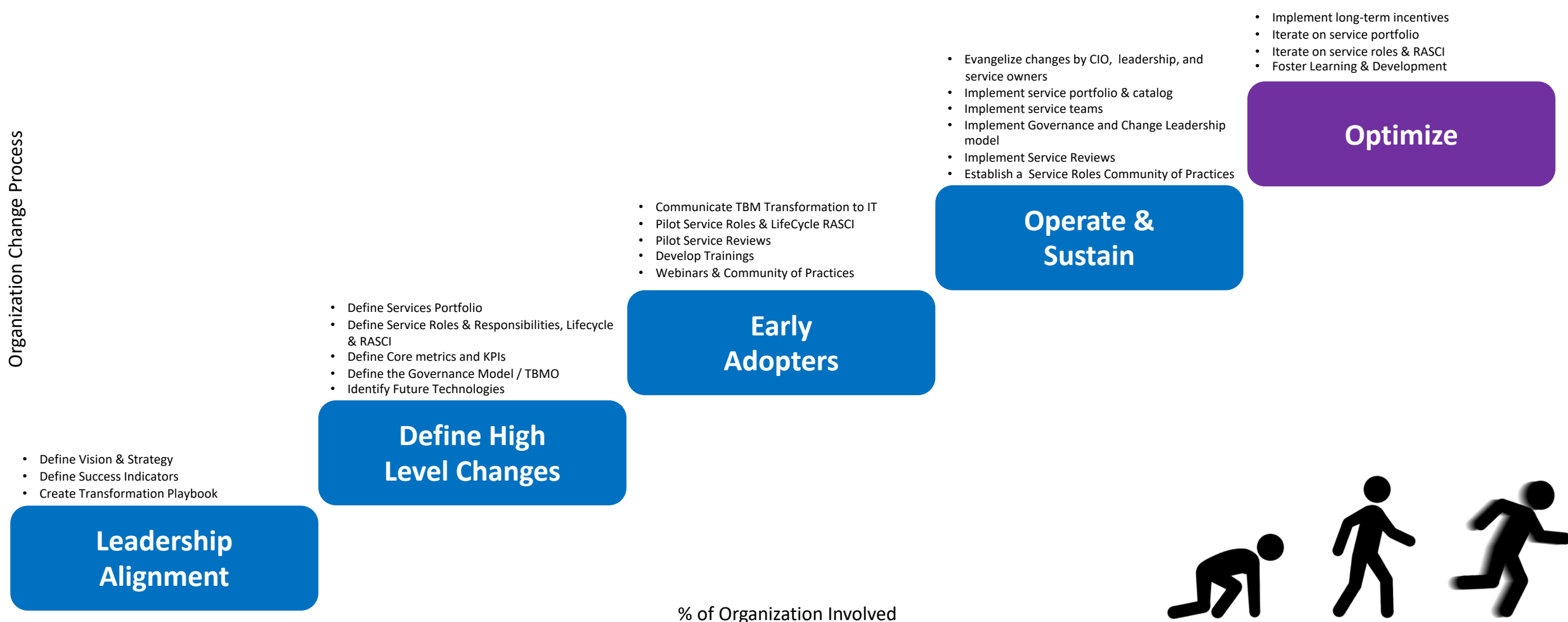knowing where you want to go...

Rego's TBM *Culture* Journey Map ™

Rego's TBM Culture Journey Map™

The **Journey Map** provides a framework to address transformational challenges and **bridges the gap** between the current state and desired transformation objectives.

Organization Change Process

- Define Vision & Strategy
- Define Success Indicators
- Create Transformation Playbook

Leadership Alignment

- Define Services Portfolio
- Define Service Roles & Responsibilities, Lifecycle & RASCI
- Define Core metrics and KPIs
- Define the Governance Model / TBMO
- Identify Future Technologies

Define High Level Changes

- Communicate TBM Transformation to IT
- Pilot Service Roles & LifeCycle RASCI
- Pilot Service Reviews
- Develop Trainings
- Webinars & Community of Practices

Early Adopters

- Evangelize changes by CIO, leadership, and service owners
- Implement service portfolio & catalog
- Implement service teams
- Implement Governance and Change Leadership model
- Implement Service Reviews
- Establish a Service Roles Community of Practices

Operate & Sustain

- Implement long-term incentives
- Iterate on service portfolio
- Iterate on service roles & RASCI
- Foster Learning & Development

Optimize

% of Organization Involved

1 Leadership Alignment

Leadership Alignment refers to ensuring that leaders within an organization share a common vision, goals, and strategic priorities. It is essential for driving business success, fostering collaboration, and ensuring that teams work toward the same objectives.

CIO
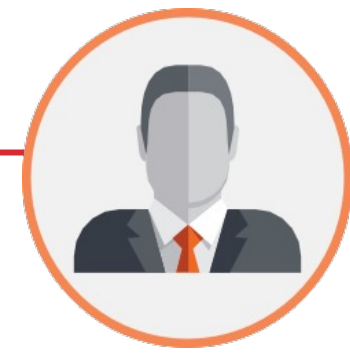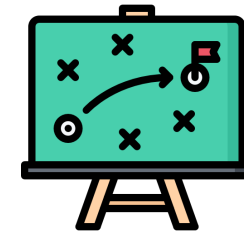
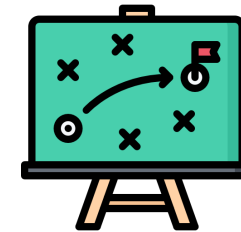| Define Vision & Strategy	Define Success Indicators	Transformation Playbook

By leveraging Technology Business Management, we will now have a better way to discuss **needs, tradeoffs,** and **funding decisions** with the business in terms that they can understand while making the magic of IT happen behind the scenes.

Leadership Alignment

1

Leadership Alignment refers to ensuring that leaders within an organization share a common vision, goals, and strategic priorities. It is essential for driving business success, fostering collaboration, and ensuring that teams work toward the same objectives.

CIO
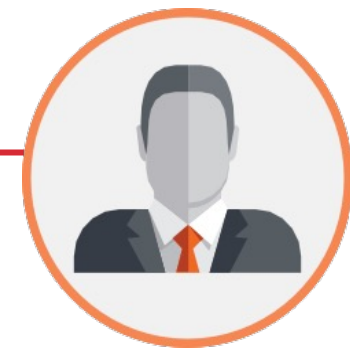
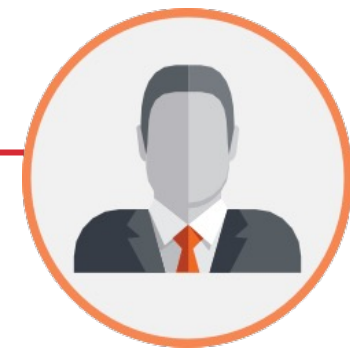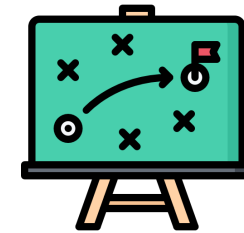| Define Vision & Strategy	Define Success Indicators	Transformation Playbook

- **Financial Performance** (Revenue Growth)
- **Customer Metrics** (Net Promoter Score)
- **Leverage & Reuse** (User Adoption Rates)
- **Strategic Alignment** (Stakeholder Engagement)

Leadership Alignment

1

Leadership Alignment refers to ensuring that leaders within an organization share a common vision, goals, and strategic priorities. It is essential for driving business success, fostering collaboration, and ensuring that teams work toward the same objectives.

CIO

| Define Vision & Strategy	Define Success Indicators	Transformation Playbook

- **Taxonomy, Service Portfolio & Catalog**
- **Service Roles & LifeCycle**
- **Service Metrics & Reviews**
- **Governance & Change Leadership**

Strategy Tagline

A **strategy tagline** is a short, impactful phrase that encapsulates an organization's strategic vision, direction, or key priorities. It serves as a guiding statement to align employees, stakeholders, and customers with the company's mission and goals
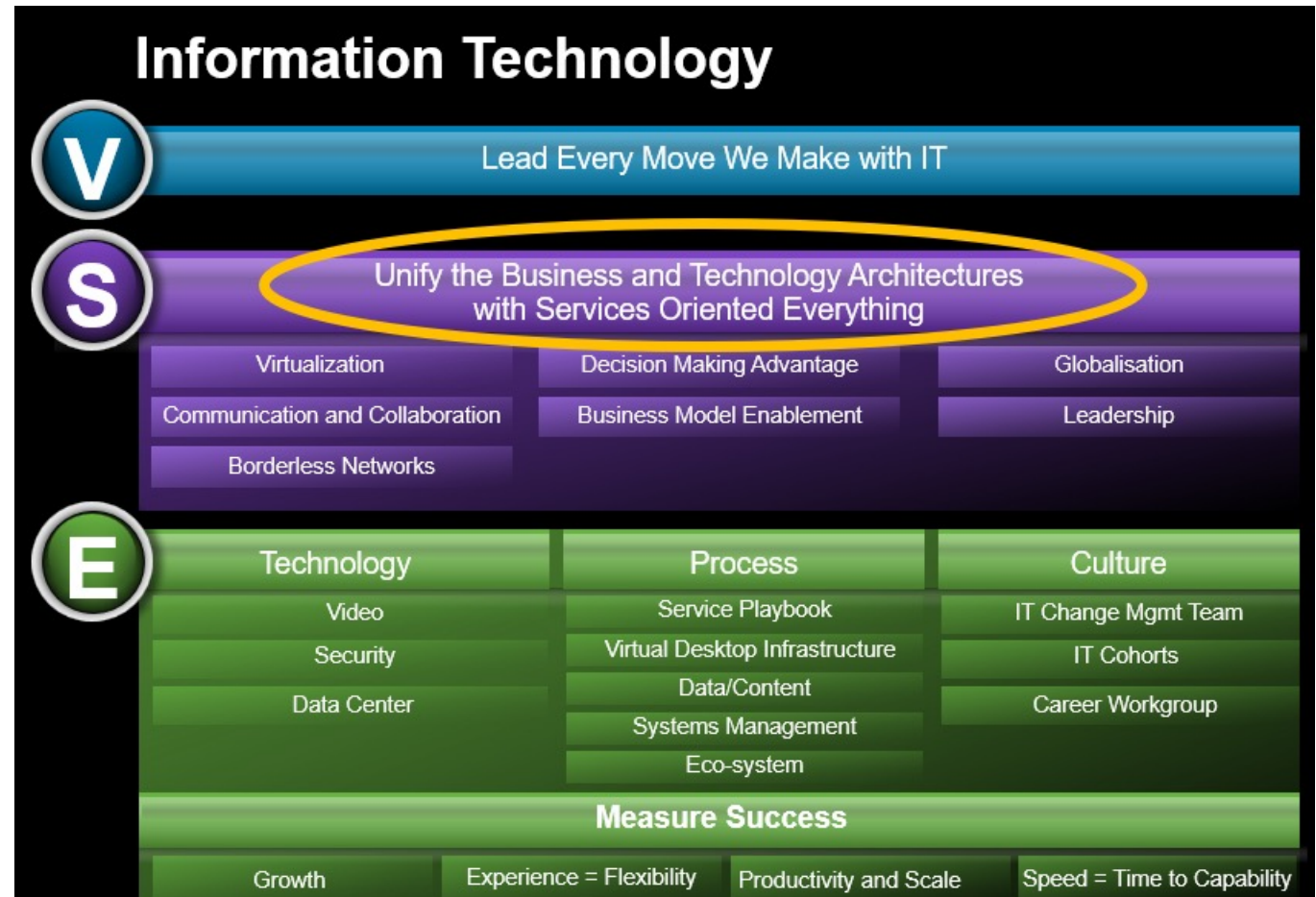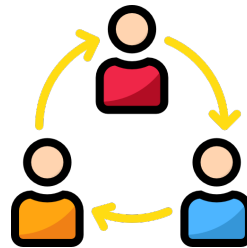
2 Define High Level Changes

High-Level Changes refer to significant, strategic modifications within an organization, project, or system that impact its overall direction, structure, or objectives. These changes are broad in scope and typically involve leadership decisions, long-term planning, and large-scale transformations.

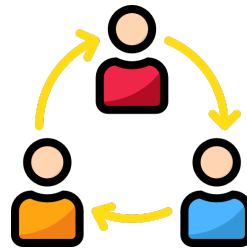| Change Story	Define Service Roles	Define Service Portfolio

- **Background Context (Need for change)**

- **Objectives (Goals that change)**

- **Stakeholders, Champions, and Change Agents**

- **As-Is and To-Be State**

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2 Define High Level Changes

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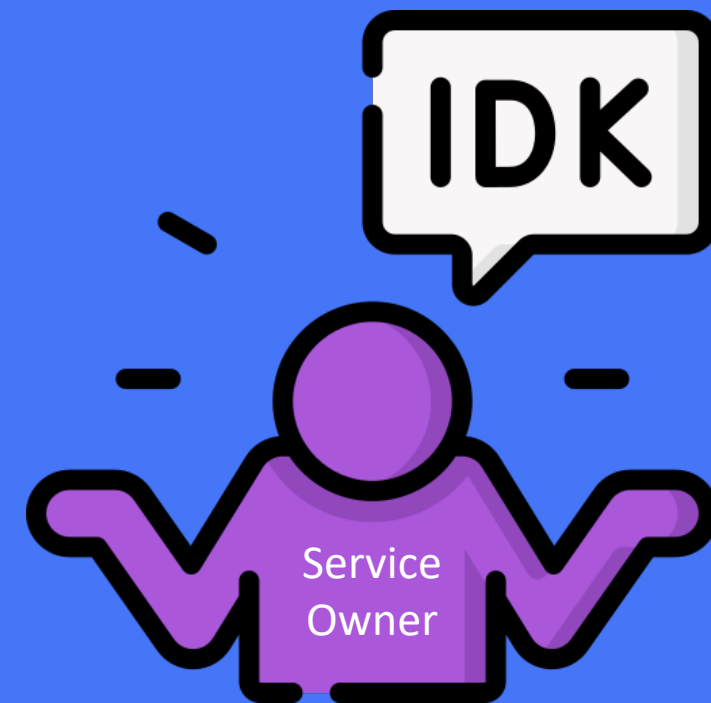
Change Story	Define Service Roles	Define Service Portfolio

- **Service Executive**
- **Service Owner**
- **Service Offering Manager**
- **Business Relationship Manager**
- **Service Architect**
- **Service Portfolio Manager**

IDK

Pitfall

Service Owner

Service Roles LifeCycle

The **Service Lifecycle** is a **set of activities** that describe how a service is managed. It comprises five phases, as described below:

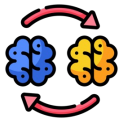| Phase	Description
Strategize	Align with business strategy and cli... ...s, connect to value creation, and leverage the ...
Plan	Translate ... ...lans and share them ... requirements.
Implement	Re... ...ons. Prepare bus...
Operate	Supp... identi... ...ue to validate alignment and ...d provider relationships.
Optimize	Benchma... ...nance to identify improvement opportunities to work into the servi... ...vice value results into the IT portfolio.
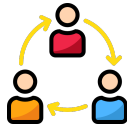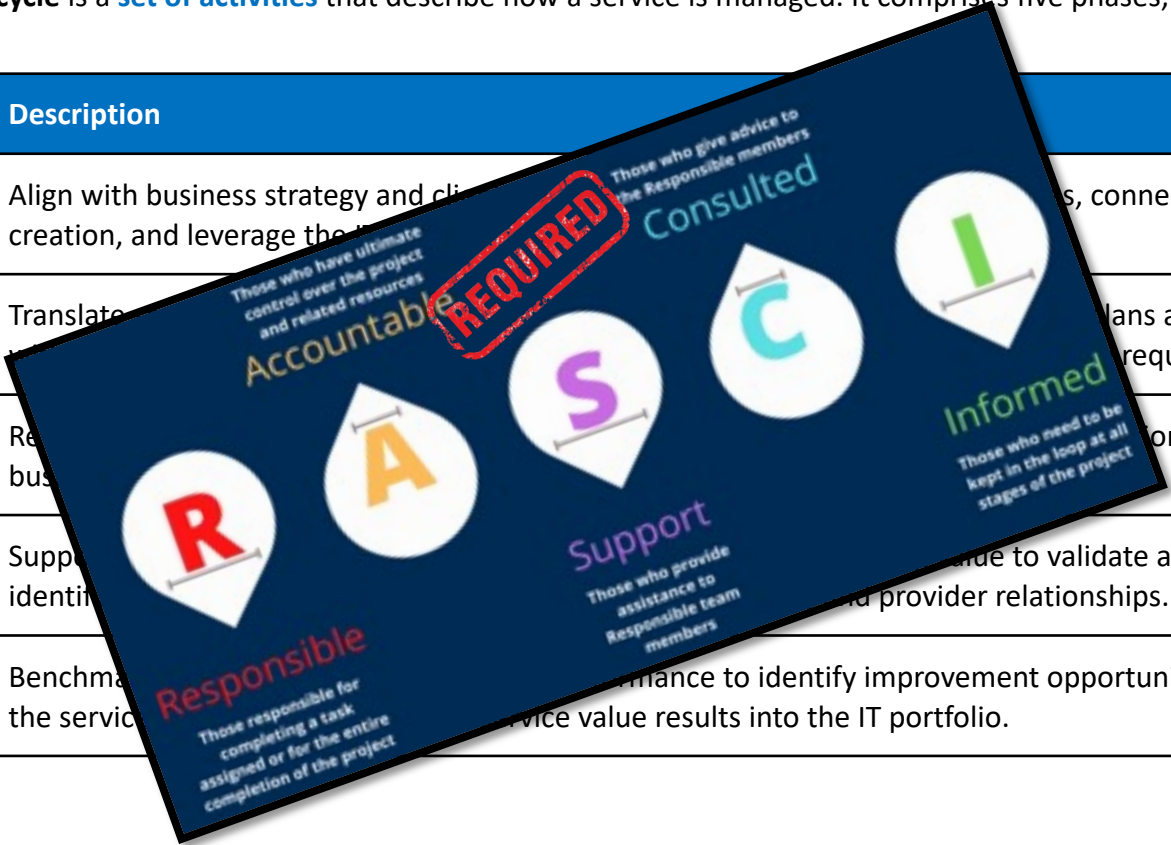
**Community of Practices**   **Global Webinars**   **Training & Development**   **Organizational Change**

2 Define High Level Changes

High-Level Changes refer to significant, strategic modifications within an organization, project, or system that impact its overall direction, structure, or objectives. These changes are broad in scope and typically involve leadership decisions, long-term planning, and large-scale transformations.
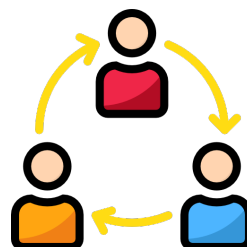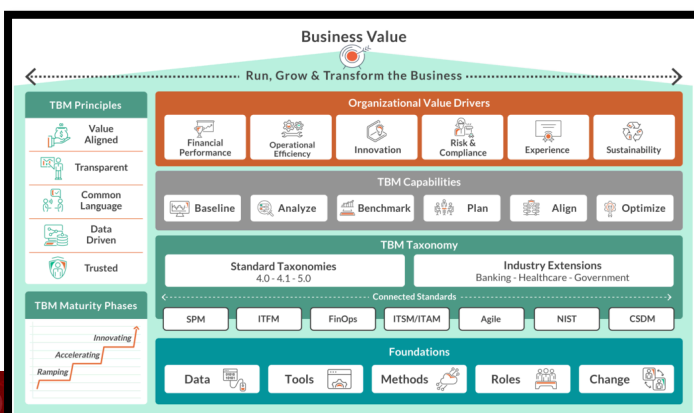
Change Story	Define Service Roles	Define Service Portfolio

ATUM 5.0 Preview: https://www.tbmcouncil.org/learn-tbm/research/modernizing-tbm/

Business Services | **Technical Services**

Service Hierarchy

Solution
- Defined by the TBM Council
- High-level categorization

Category
- Defined by the TBM Council
- A logical grouping of services against which investment tradeoff decisions can be made

Service
- Defined by the TBM Council
- Outcome defined to resonate with the client
- Associated with the Architecture Model

Offering
- Defined by the Service Team & Rego
- Variations of the Service
- What end consumers subscribe to

Assets

Workplace Services		
Communication & Collaboration		
Video Conferencing		
Teams	WebEx	Zoom
Hardware People Process Apps	Hardware People Process Apps	Hardware People Process Apps
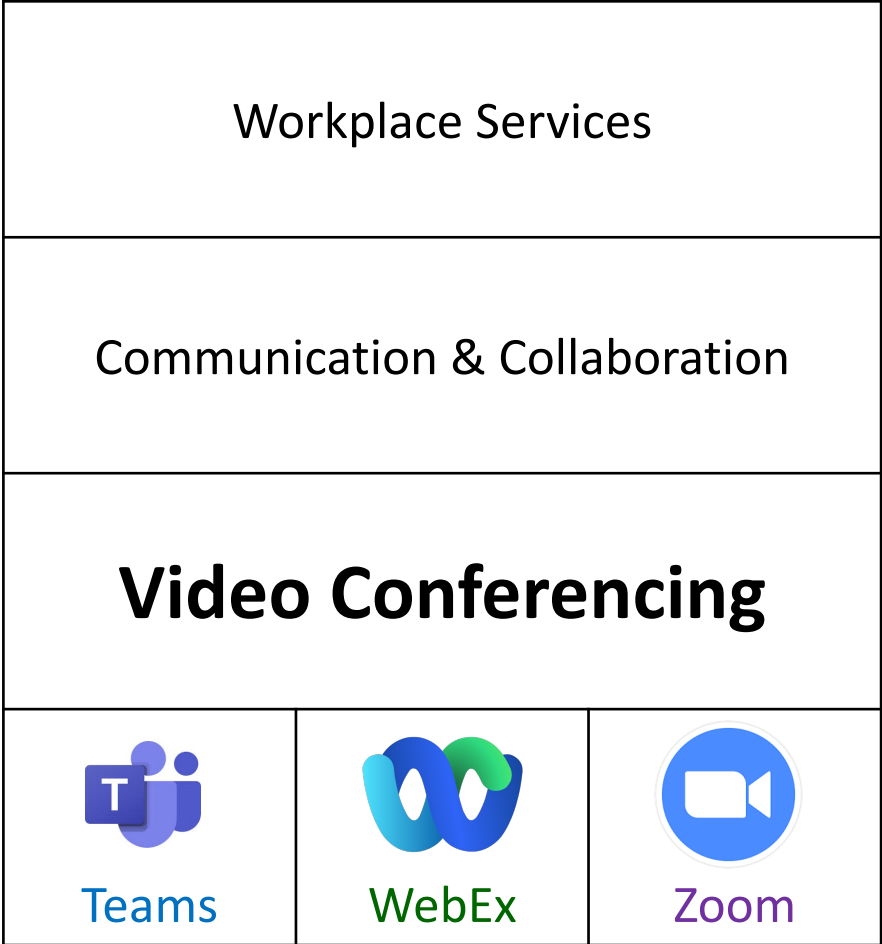
Service Portfolio & Catalog

Service Portfolio

Business Services

Product Development	Marketing & Advertising
Customer Sales	Resource Planning
Order Management	Customer Care

Shared Services

Accounts Receivable	Risk Management
Recruitment	Benefits
Healthcare	Compliance

Platform Services

Database	Data Management
Data Analytics	Application Hosting
Development Platform	Content Management

Infrastructure Services

Data Center	Voice Network
Data Network	Virtual Private Network (VPN)
Physical Compute	Back and Archive

Delivery Services

Service Management Office (TBMO)	Portfolio Management Office (PMO)
Enterprise Architecture	Testing and QA
Service / Help Desk	Security / InfoSec

Workplace Services

Desktops & Laptops	Smartphone & Tablets
Printers	Communication & Collaboration
Network Access	Remote Access

Service Catalog

Desktops & Laptops	Smartphone & Tablets
Training & Webinars	Software
Unified Communications	Video Conferencing

Do you have a fully built out Service Portfolio?

Pitfall

IT Operating Model Services are part of IT Spend

The **IT Operating Model** **HOW** we do business in IT
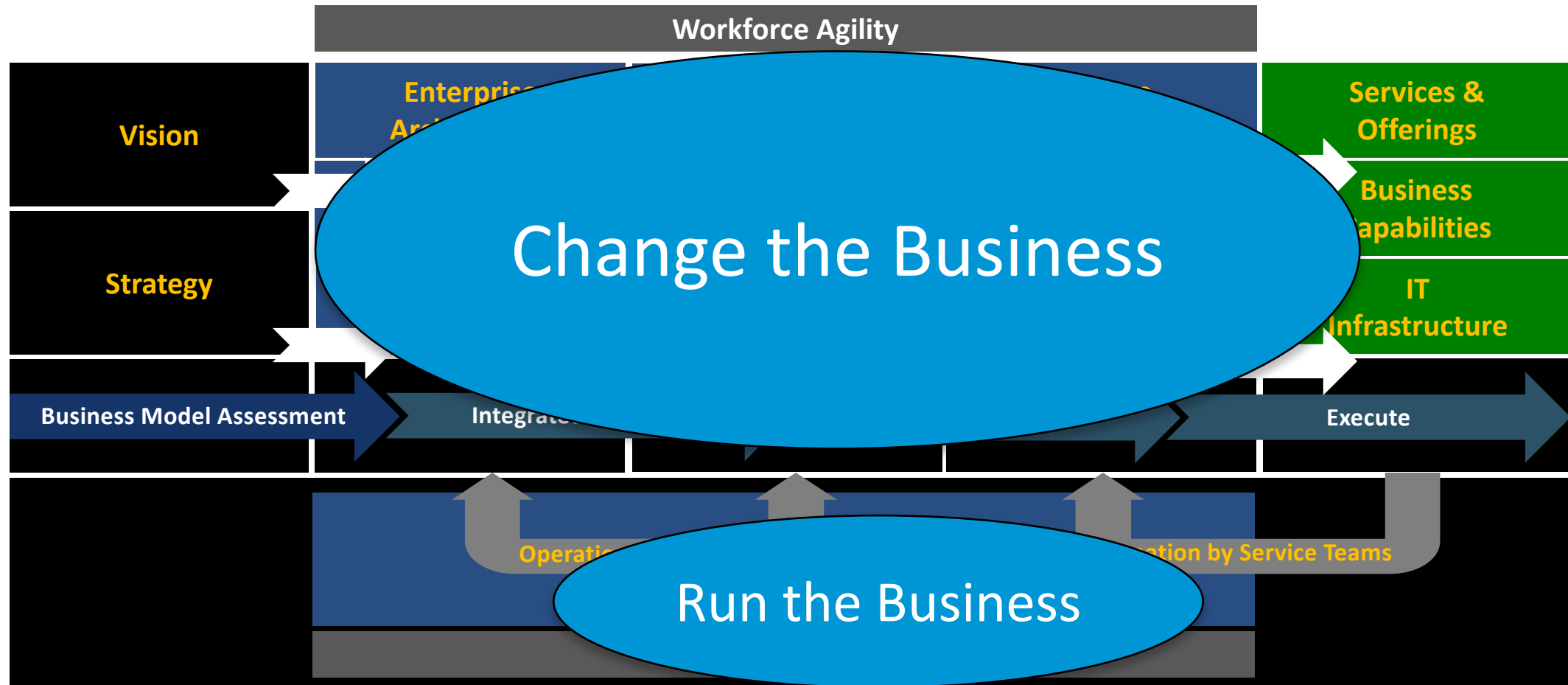
Workforce Agility

Vision

Strategy

Enterprise Architecture

Services & Offerings

Business Capabilities

IT Infrastructure

Business Model Assessment → Integrate → Execute

Change the Business

Operation by Service Teams

Run the Business

3 Early Adopters

Early Adopters are Individuals or teams that are among the first to embrace new **technologies, processes, or innovations** before they become widely accepted. These users play a crucial role in testing, validating, and refining new IT solutions before full-scale deployment.

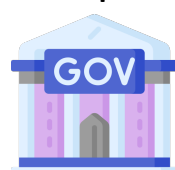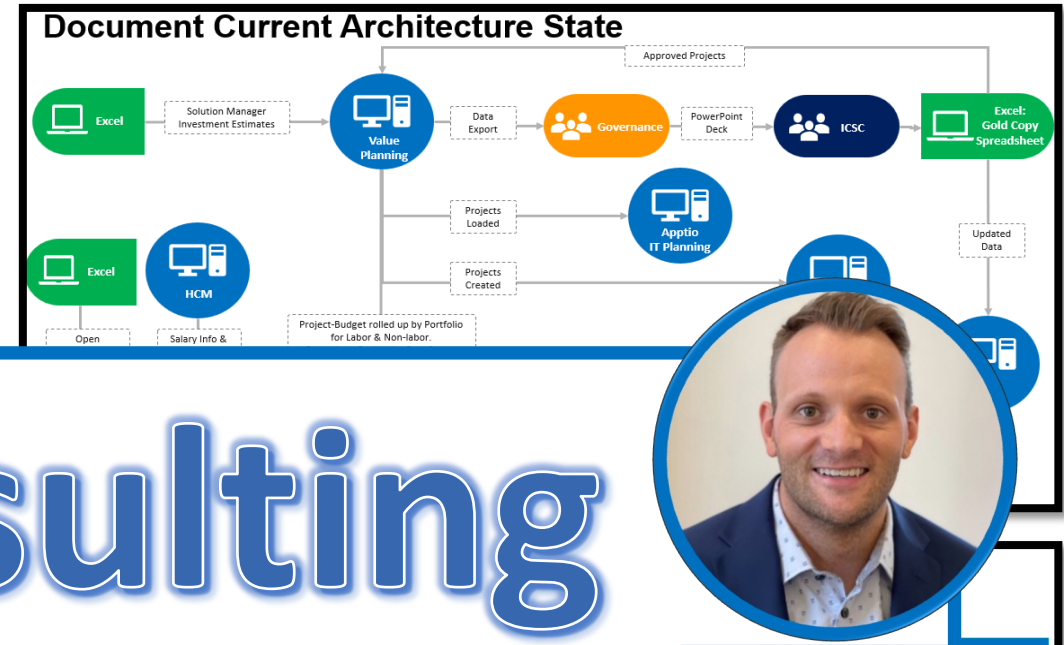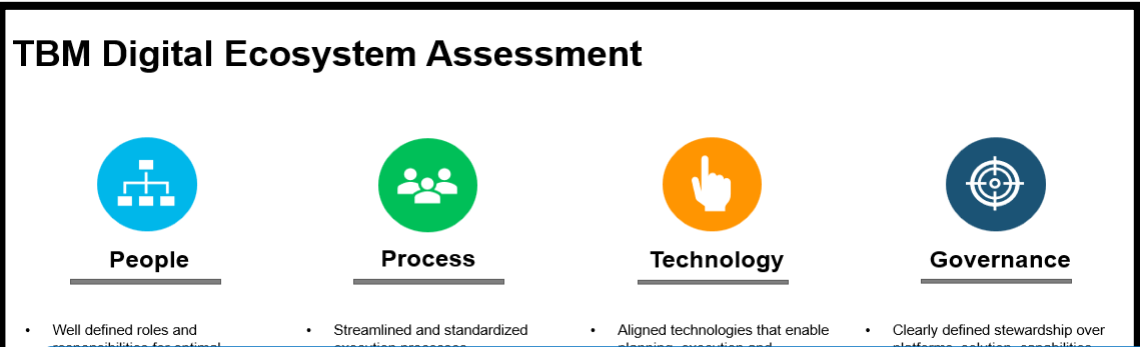| Digital Ecosystem Assessment	Service Reviews	Business Champion Identified

Technology

Process

People

Governance

Digital Ecosystem Assessment

TBM Digital Ecosystem Assessment

People · **Process** · **Technology** · **Governance**

- Well defined roles and responsibilities for optimal...
- Streamlined and standardized execution processes...
- Aligned technologies that enable planning, execution and...
- Clearly defined stewardship over platform, solution, capabilities...

Document Current Architecture State

Ecosystem Roadmap
Receive expert guidance for your ecosystem architecture, including quick wins, mid-term, and long-term improvements.

Recommendation Map
Discuss preliminary findings and best practice recommendations.

Detailed Review
Review people, process, technology, and governance interviews, team sessions, systems review to...pain points and identify opportunities.

Sponsor	Lead		
5% Allocation	50% Allocation	25-50%	
• Work across the organization to **drive continued alignment** of the initiative with business priorities. • **Champion the initiative** across teams and up to executives • **Resolve escalations**	• **Set overall project direction** • **Oversee** program's progress • **Make decisions** on escalated issues and additional resource needs	• Participates in **solution design** • Completes training • Understand post-implementation care and feeding • **Continues in the role** past implementation	• **Participates in interviews** and working sessions • **Trains end users** in train-the-trainer model • Point of contact for **team questions**

Rego Consulting

Talk to Doug Greer

Talk to Jacob Cancelliere

Digital Ecosystem Assessment

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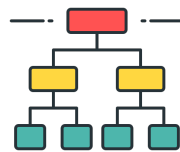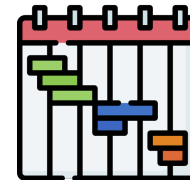
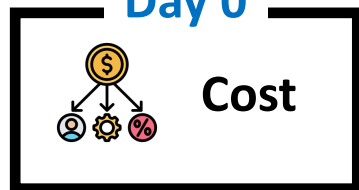| Change Story	Service Reviews	Business Champion Identified

Allocation Explanation

Service Definition

Demand & Projects

Service Reviews

Day 0

Cost | Quality | Risk | Speed | Leverage & Reuse | User Experience

Service Reviews are designed for each service team to tell a comprehensive story about enabling **business outcomes** through architecture, strategy and specific services, explaining the **value** that is achieved from our investment.

Summary	IT Service Metrics	Decisions Needed
• This is your Portfolio view on the business outcomes you will achieve, and how it relates to Services executing on the strategies • Use high level quantitative metrics to show impact to services (drill down in Service metrics dashboard)	• Use the Services dashboard to tell a specific story • Show the Visual of Green and say, 'we're great on these, but we need to talk about the reds and the yellow, our areas of concern'	• Talk about the choices you have, and architectural decision needed • Relate this back to ''What keeps me up at night'

🔴 🟡 🟢 | ⬆ ⬇

Architecture Roadmap	Investment Summary	Key Messages
• List only architecture items – this is NOT a list of every item on the implementation roadmap • Ensure this links to the Summary (same strategies listed) • Indicate use of continuous delivery in relation to this IT strategy	• Your TCO curves • State number of demand/ideas and active projects against your services. • Provide project statuses. • State how your CtB investments reduce your RtB spend.	• Three (3) distinct messages • Emphasize the key points from your presentation (relate each point back to material on previous slides or metrics dashboard) • Conclude and balance your story by highlighting your successes (from roadmap) and value (from Investment Summary or summary slide)

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Pitfall

Persona's

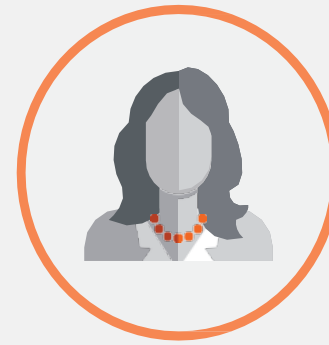| CIO & Leadership Staff	Infrastructure Leaders	CFO of IT & IT Finance	Solution Owner	Business Relationship Mgr.
Make Fact-Based Decisions to Shift Run to Grow	**Drive Efficiency and Demonstrate Business Alignment**	**Establish Governance and Drive IT Financial Planning**	**Manage and Improve Solution Value**	**Align Resources to Business Priorities**
• Optimize Run vs. Change • Align Project Spend to Initiatives • Drive Cost Optimization • Align Spend to Biz Priorities	• Optimize Infra TCO/Unit Costs • Reduce Technical Debt • Drive Use of Standard Infra • EOL At-Risk Technologies	• Measure/Report Fixed/Variable • Manage IT Budgeting Process • Identify Cost Reduction Opps • Manage Under/Over Recovery • Drive Rates Management	• Manage Solution TCO • Set/Manage Solution Rates • Manage Build vs. Run • Rationalize Solution Apps • Drive Decommission Decisions	• ID Biz Priorities vs. IT Spending • Create Levers to Shape Demand • Help Biz Optimize Consumption • Communicate Consumption

4 Operate & Sustain

Early Adopters are Individuals or teams that are among the first to embrace new **technologies, processes, or innovations** before they become widely accepted. These users play a crucial role in testing, validating, and refining new IT solutions before full-scale deployment.
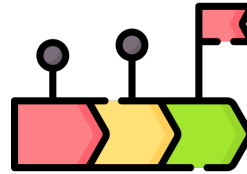
TBM Office or Other	Show Value Early & Often	Change Agent

Service Name: TBM Office

Service Portfolio	Service Costing	Service Roles	Service Metrics

Governance & Organizational Change

TBM Office

TBMO Business Outcomes:

- Strategic Alignment through service and project portfolio management

- Value Delivery through the portfolio, financial, and asset tracking

- Performance Measurement through metrics and reporting

- Resource Management through labor, software, and hardware tracking

- Risk and Compliance Management through policies, procedures, and contract tracking

TBMO Enables:

FY24 TCO & Health

Q1	$1.1	🟢
Q2	$1.0	🟡
Q3	$1.0	🟢
Q4	$1.3	🟢

IT Management
- Understand the operating cost of IT Services & Resources
- Identify the source of spending variance to plan
- Automate the analysis of IT staffing efficiency
- Adoption of Service Roles

IT Finance
- Drive awareness of the cost of technology services
- Provide defensible cost allocations
- Manage your IT financial plan

Service Owner
- Understand service and service offering total cost of ownership (TCO) in detail along with quality and value
- Understand application's total cost of ownership (TCO) in detail along with quality and value
- Rationalize service offerings & applications

IT Operations
- Right size infrastructure capacity for usage
- Rationalize hardware and cloud platforms
- Optimize server and storage environments
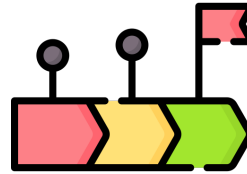
Business Owner
- Communicate the value of IT in business terms
- Align IT spending and investments to business needs and outcomes
- Influence business demand
- Change mindset of IT from cost center to innovation center, back office function to a front office function

Data Quality Owner
- Understand the operating cost of IT Services & Resources
- Identify the source of spending variance to plan
- Automate the analysis of IT staffing efficiency
- Adoption of Service Roles

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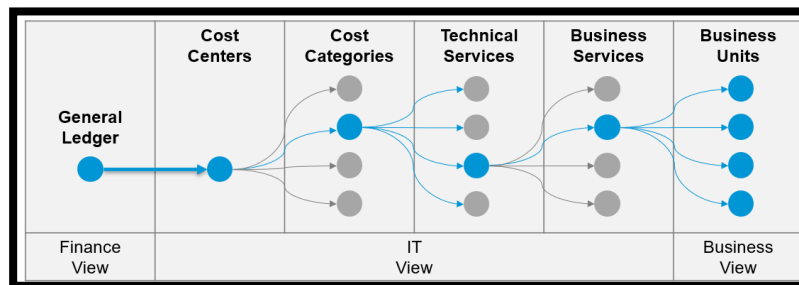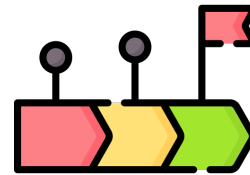| TBM Office or Other	Show Value Early & Often	Change Agent

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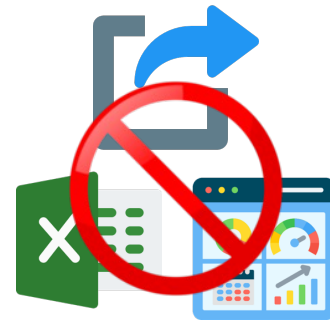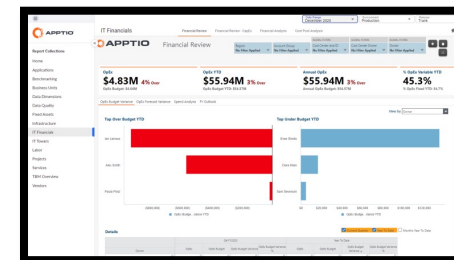
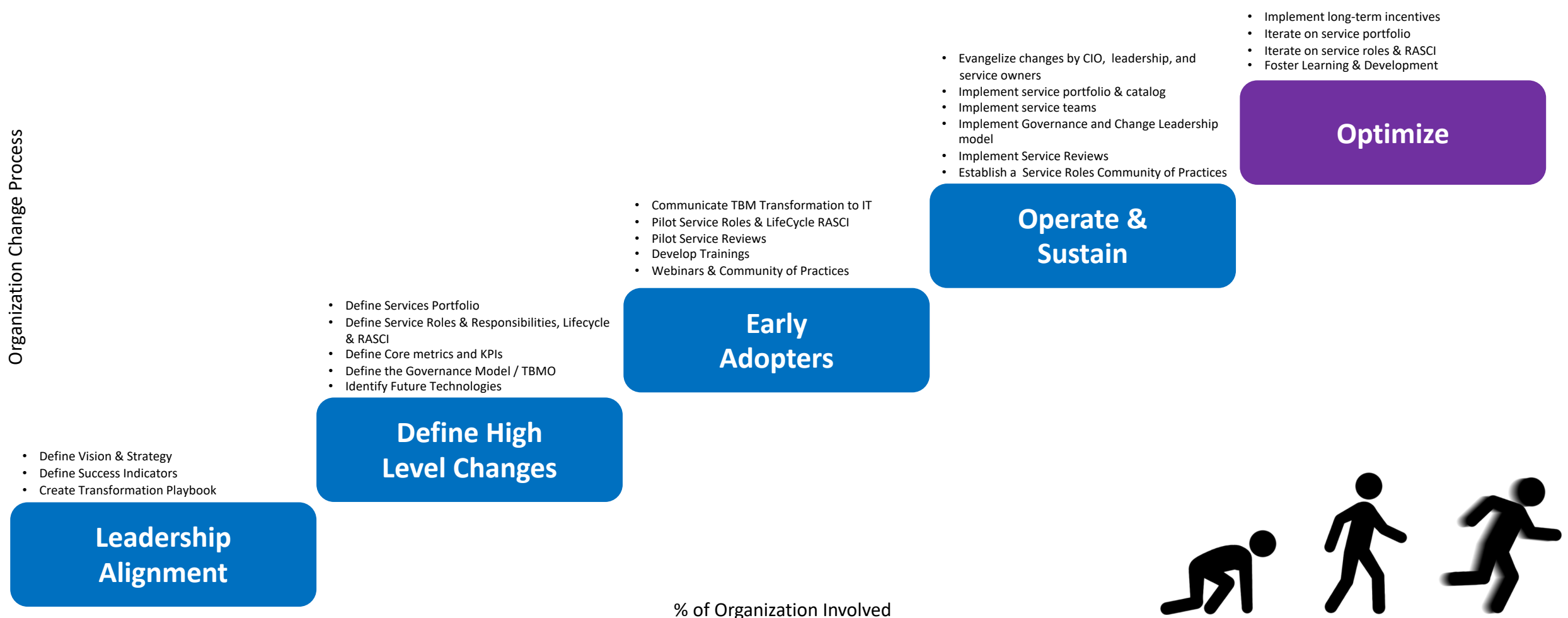| TBM Office or Other | Show Value Early & Often | Change Agent |

Almost done...

Rego's TBM Culture Journey Map™

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Early Adopters

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- Define Core metrics and KPIs
- Define the Governance Model / TBMO
- Identify Future Technologies

Define High Level Changes

- Define Vision & Strategy
- Define Success Indicators
- Create Transformation Playbook

Leadership Alignment

% of Organization Involved

Benefits of the Journey Map

Strategic Alignment	Clear & Consistent Communication	Enhanced Collaboration
• Ensures that technology, business goals, and stakeholder expectations are in sync. • Helps in prioritizing initiatives based on business value and impact.	• Provides a visual representation of plans, making it easier to communicate strategies. • Helps teams understand milestones, dependencies, and timelines.	• Aligns cross-functional teams (IT, finance, operations) towards a common goal. • Encourages transparency and accountability across departments.

Improved Decision-Making   Progress Tracking & Measurement

Flexibility & Adaptability   Organization Adoption

Thank you

Questions?

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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Website
www.regouniversity.com