



Agree and Define (IPAD)

This ITIL practitioner certification training course, explores the processes of service level management and financial management leading to the practitioner certificate from EXIN in the above mentioned disciplines of IT service management. Participants will learn how to manage, organize and optimize the functions of service level and financial management in an organization. They will learn to run their IT organization like a business by developing process interfaces, building strong customer relationships, increasing service quality and applying proven fiscal practices. This course includes the exam leading to the Practitioner Certificate in IT Agree and Define. All students receive a course manual

Objectives

- ✦ Define IT Services and Produce a Service Catalog
- ✦ Create Realistic IT and Customer Budgets Cost IT Services
- ✦ Develop an IT Accounting and Charging System
- ✦ Draft, Negotiate and Execute Service Level Agreements Hands-on Application of the Process Activities through Assessed Practical Assignments
- ✦ Identify Opportunities to Continually Improve and Measure the Processes Prepare for and pass the exam for the Practitioner's Certificate in Service Level and Financial Management

Duration

5 days

Prerequisites

Students for this course: Must hold a Foundation Certificate in IT Service Management and should have a Practical experience in the field of Service Desk, Incident and Problem Management

Who Should Attend

- ✦ IT professionals responsible for Service Level and / or Financial Management, including IT Service Managers, Service Level Managers and Financial Managers
- ✦ Manager of the Service Desk function - Incident coordinator Problem coordinator
- ✦ Internal and External IT Suppliers
- ✦ Senior technical and operational staff
- ✦ IT professionals and Consultants working in the area of IT Service Support and/or IT operations IT working in the area of IT service delivery and/or IT operations
- ✦ Employees and Managers responsible for executing and managing the tasks for the specific ITIL® processes

Course Syllabus

Introduction and Overview

- ✦ Planning and managing the key activities of the Agree and Define processes
- ✦ Service Level Management
- ✦ Financial Management
- ✦ Optimizing the Agree and Define processes

Planning the Key Financial and Service Level Management Activities Delivering IT services with Service Level Management

- ✦ Planning to implement Service Level Management
- ✦ Identifying potential costs, benefits and problems
- ✦ Determining the objectives and scope
- ✦ Creating the Service Catalog

Managing IT assets and resources with Financial Management

- ✦ Defining the roles and responsibilities
- ✦ Budgeting, IT Accounting and Charging
- ✦ Financial Management support tools and techniques

Monitoring and Reporting

- ✦ Monitoring the Agree and Define activities
- ✦ Reporting the effectiveness and efficiency of the activities using Key Performance Indicators (KPI)
- ✦ Establishing metrics to monitor effectiveness

Maintaining the Procedures & Developing the procedures of the Agree and Define processes

- ✦ Ensuring activities within the Agree and Define processes meet the objectives set
- ✦ Defining KPIs and metrics
- ✦ Auditing process requirements
- ✦ Identifying weaknesses and associated resolutions

Administering Service Level Management & Agreement formats and supporting documents

- ✦ Service Level Agreement (SLA)
- ✦ Underpinning Contract (UC)
- ✦ Operational Level Agreement (OLA)
- ✦ Matching contracts to the services
- ✦ Defining the type and format of the SLAs: Multi-level, Service based and Customer based
- ✦ The impact of OLAs and UCs on the overall agreement

Negotiating for various agreements

- ✦ Identifying the Service Level Requirements for each service
- ✦ Negotiating with the customer to match requirements to services available
- ✦ Reviewing language within the SLAs
- ✦ Maintaining the Service Catalog

Establishing Financial Management for IT Services & Planning future IT expenses with effective budgeting

- ✦ The budgeting cycle and inputs into the budgeting process
- ✦ Creating a budget for IT services
- ✦ Monitoring, reviewing and reporting on performance

Financial analysis with IT accounting

- ✦ Developing the IT Accounting System
- ✦ Identifying and documenting cost types
- ✦ Performing an Investment Appraisal: cost benefit analysis, return on investment, return on capital employed

Assigning costs with charging

- ✚ Constructing the Charging System
- ✚ Identifying Charging policies and Pricing options
- ✚ Considering variable costs and charges

Creating Financial reports

- ✚ Accounting reports
- ✚ Annual plans
- ✚ Balance sheets
- ✚ Charging reportings
- ✚ Data analysis and collection

Optimizing the Agree and Define Processes

- ✚ Proposing service and process improvements
 - ✚ Planning and conducting audits
 - ✚ Managing the ongoing financial operations and performance
 - ✚ Participating in ongoing service management through service review meeting
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