

# **Project Methodology for ITIL Projects**

*itsm Partnership*   
*achieve more together*

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# 1 Overview

## 1.1 ITIL meets PMBOK

itSMP combines two world-wide Best Practice Frameworks.

Utilise the benefits of PMBOK<sup>1</sup> in your next ITIL project with a Tool Kit with combines them both, that anyone can use.

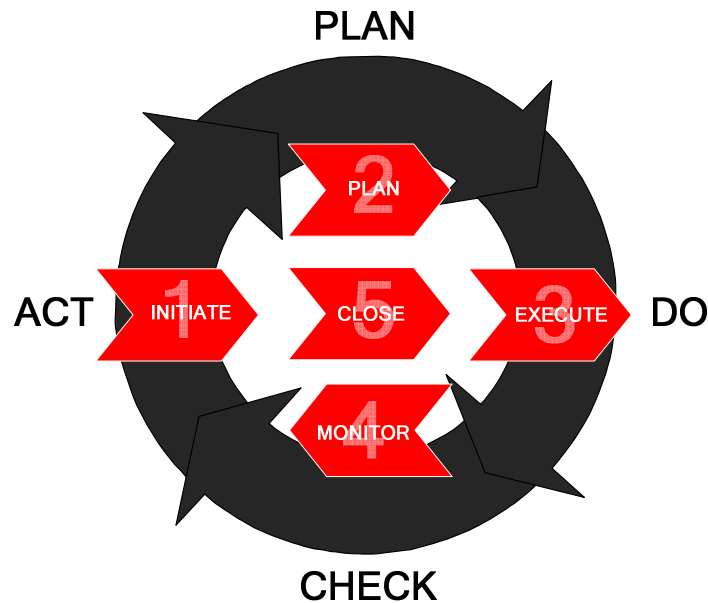
iPPM is a Project Management Tool Kit for ITIL Project Implementations. It takes the best known project management techniques and applies them to an ITIL Best Practice implementation in an easy-to-apply, accessible format. The Tool Kit presents an easy-to-understand End-to-End workflow with a Critical Path identified. iPPM shows you Step-by-Step how to manage each step of the ITIL project lifecycle.

There are powerful, tried and tested Templates, Guides and other tools to facilitate a quicker, quality implementation. If you're a novice, the Tool Kit will lead you calmly and effectively through unknown territory. And if you're an experienced project manager in ITIL implementations, this complete guide will serve as a repository of process templates, guides and tools to ensure that you never forget a step, even when handling the most unusual or complicated projects.

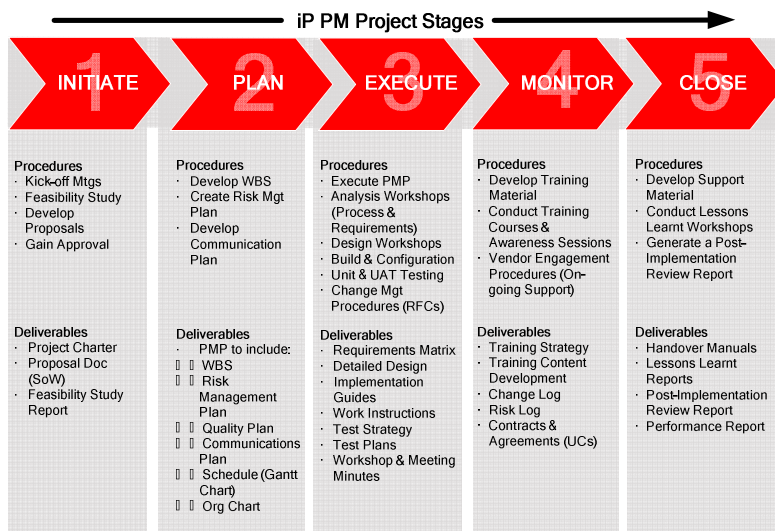
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<sup>1</sup> PMBOK is the Project Management Body of Knowledge developed by the Project Management Institute (PMI).

MONITORING & CONTROLLING PROJECTS WITH  
CONTINUAL IMPROVEMENT

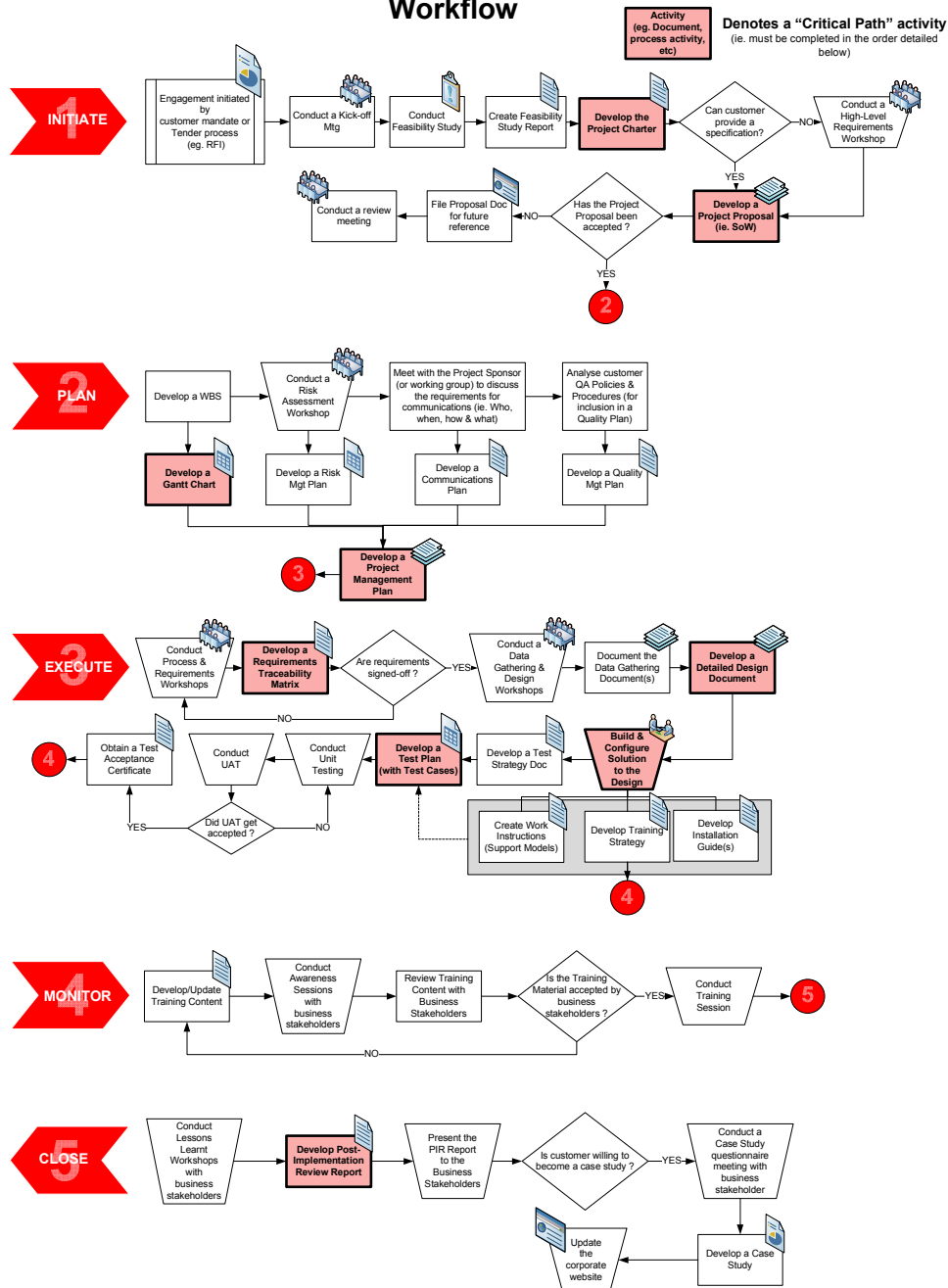


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The work flow diagram below shows the project flow, with the generated artefacts. Note that the pink boxes denote a critical path activity. For all projects, these critical activities should be completed. Non critical steps may be omitted based on the project's complexity and needs.

## itsm Partnership Project Management Methodology Workflow



## 1.2 What is included

In the full version of the iPPM tool kit, for each of the 5 phases, templates based on our 10 years experience are provided. These templates are not just section headings, but include actual details that only require minor inputs to generate a completed document.

The iPPM tool kit provides:

- 57 Word Documents

- 5 Power Point Presentations
- 18 Spreadsheets
- 3 Schedules

## **Initiate**

- iP Deliverable Acceptance Form Template v3.0.doc
- iP Feasibility Study Report Template v3.0.doc
- iP Meeting Agenda Template v3.0.doc
- iP Meeting Minutes Template v3.0.doc
- iP Project Fortnightly Status Report Template v3.0.doc
- iP Project Monthly Report Template v3.0.doc
- iP Scope Meeting Agenda & Notes v3.0.doc
- iP Project Charter v3.0.doc
- iP SOW Template v3.0.doc (Statement of Work - Proposal)
- iP Standard Terms and Conditions v3.0.doc
- iP Training SOW Template v3.0.doc
- iP Training SOW Template GITC Version v3.0.doc
- Timesheet Template 2007-09-08 v3.0.xls

## **Plan**

- iP Best Practice Risk Management Guide v3.0.doc
- iP Project Handbook Template v3.0.doc
- iP PMP Description v3.0.doc
- iP Project Management Plan Template v3.0.doc  
*including:* Quality Plan, Communications Plan, Risk Management Plan, Resource Plan
- iP Project Team Org Chart v3.0.vsd
- iP Risk - Issue - Action Register Template v3.0.xls
- iP Service Desk Gantt Chart Template v3.0.mpp
- iP Service Desk Design Gantt Chart Template v3.0.mpp
- iP Service Desk Implementation Gantt Chart Template v3.0.mpp

## **Execute**

- iP Service Desk Detailed Design v3.0.doc
- iP CFG System Requirements v3.0.doc
- iP Change Log v3.0.xls
- iP Change Process Definition v3.0.doc



- iP Change Request Log Template v1.0.doc
- iP Change Request Template v3.0.doc
- iP CHG Impact Assessment Form v3.0.doc
- iP CHG Impact Assessment Report v3.0.doc
- iP Data Gathering for INC Design Template v3.0.doc (Incident)
- iP Data Gathering for CFG Design Template v3.0.doc (Configuration)
- iP Data Gathering for CHG Design Template v3.0.doc (Change)
- iP Data Gathering for PRB Design Template v3.0.doc (Problem)
- iP Data Gathering for SLM Design Template v3.0.doc (Service Level Mgt)
- iP Escalation Matrix v3.0.xls
- iP INC Procedures Diagram v3.0.doc
- iP INC Process Definition v3.0.doc
- iP INC Process Workflow Diagram v3.0.doc
- iP INC Process Workshop Questions v3.0.xls
- iP INC RACI Matrix v3.0.xls
- iP INC Requirements Capture v3.0.xls
- iP Incident Priority Matrix v3.0.doc
- iP INC System Requirements v3.0.doc
- iP CHG Procedures Diagram v3.0.doc
- iP CHG Process Definition v3.0.doc
- iP CHG Process Workflow Diagram v3.0.doc
- iP CHG Process Workshop Questions v3.0.xls
- iP CHG RACI Matrix v3.0.xls
- iP CHG Requirements Capture v3.0.xls
- iP CHG System Requirements v3.0.doc
- iP Practice of SLM v1.0.doc
- iP Problem Management Reports Catalog v3.0.doc
- iP Request Fulfilment Procedures Diagram v3.0.doc
- iP Requirements Traceability Matrix Template v1.0.xls
- iP Requirements Traceability Matrix Template v1.1 PRB.xls
- iP Service Catalogue Template v3.0.doc
- iP Service Catalogue Presentation v3.0.ppt
- iP Services - Activities - Metrics v3.0.xls
- iP SIG Template v1.0.doc (System Implementation Guide)
- iP SLM Design Template v3.0.doc

- iP SLM Requirements Traceability Matrix V0.1.xls
- iP Test Strategy Presentation Template v1.0.ppt
- iP Test Strategy Template v1.0.doc
- iP UAT Test Cases Template v1.0.xls
- iP Unit Test Plan Template v1.0.xls

### **Monitor**

- iP Activity Completion Report Template v3.0.doc
- iP Change Management QRC Template v1.0.doc (Quick Reference Card)
- iP Cheat Sheet Template v1.0.doc
- iP Configuration Management QRC Template v1.0.doc (Quick Reference Card)
- iP End User Training Presentation Template v1.1.ppt
- iP Incident Management QRC Template v1.0.doc (Quick Reference Card)
- iP Master Training Schedule Template v1.0.xls
- iP Student Guide Template v1.0.doc
- iP Super User Training Introduction Template v1.1.ppt
- iP Training Strategy Template v1.1.ppt

### **Close**

- iP Lessons Learned Worksheet Template v1.0.doc
- iP PIR Questionnaire Template v1.0.doc (Post Implementation Review)
- iP PIR Report Template v1.0.doc
- iP PIR Topics Template.xls
- iP Project Closeout Report Template v1.0.doc
- iP Project Sign-off Template v1.0.doc
- iP Warranty Request Template v1.0.doc
- iP Case Study Template v3.0.doc

## **1.3 Full Version**

In the Get Started version of iPPM, you have access to the first two phases – Initiate and Plan. This allows you to get your project off the ground, while becoming familiar with iPPM.

To purchase the full version of iPPM which includes all of the templates for all phases, email us at [achievemore@itsmp.com](mailto:achievemore@itsmp.com).

## **1.4 Licence**

The user is granted a licence to use this tool kit when they purchase the full version of iPPM.

## 2 Updating Templates Instructions

Before editing a new document based on these templates follow the instructions in this section.

### 2.1 Document Properties

Before editing your new document, set up the document properties as follows:

File Menu – Properties

On the Summary Tab replace existing entries with:

- Project Title, Document Type, Your Name

On the Custom Tab replace existing entries with:

- Client, Document version, Document number, Release date, Year, etc

Be sure to remove { } from all entries. Select the whole document, and then press F9 to update all fields.

The use of fields allows consistent naming and eases copying between templates, new documents. When inserting fields, clear the 'Preserve formatting' check box. See Table 1 Field Mapping for the fields that should be used.

Field	Meaning	Example
IP PM	Document Title	<i>Release Management Implementation</i>
Project Methodology	Type of document	<i>Statement of Work</i>
itsm Partnership Pty Ltd	Delivery Company full name	<i>ITSM Partnership Pty Ltd</i>
itsm Partnership	Delivery Company Short Name	<i>iP</i>
{Project Number} -	Project No:	<i>AB 5200</i>
{Client Field}	Client/Customer	<i>AB</i>
Anthony Symons	Document Author	<i>Anthony Symons</i>

**Table 1 Field Mapping**

### 2.2 Sections and Page Numbering

This document consists of 3 sections:

1. Section 1 consists of two pages: the Title Page and the Change History Page.  
These pages are not numbered and do not contain header or footer information.
2. Section 2 consists of the Table of Contents..
3. Section 3 consists of the body of the document. Pages have headers and footers.

### 2.3 Printing

For proof reading you might like to print 2 pages per sheet.

To selectively print pages, specify pages with section numbers. E.g. p1s2, p2s2, p5s3-p10s3.

Make sure section 2 has an even number of pages to ensure that section 3 starts page 1 on a right hand page.

## 2.4 Styles

Try not to change the appearance of your document paragraphs using formatting, indenting, bullets, etc directly.

You should make all changes to your document by applying the styles provided in this template. If you need a new style feel free to add one for your document. However, a word of warning: Word breaks if you add or delete styles in a document with more than about 100 pages. So if you must add or delete styles, try to do so before your document becomes very large.

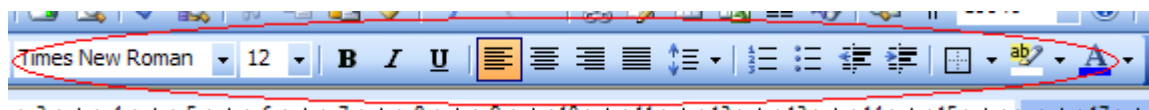
It is recommended to use the standard styles in Word (menu as shown in Figure 1 Correctly accessing styles and Formatting), rather than manual formatting of paragraphs (i.e., don't use menu in Figure 2 Incorrect formatting changes). The use of standard styles means:

- Fonts are consistent.
- Documents can be easily imported into other templates.
- Style changes can be easily made consistently.
- Documents are consistent.
- It is more obvious to the author what style to use.

**Figure 1 Correctly accessing styles and Formatting**

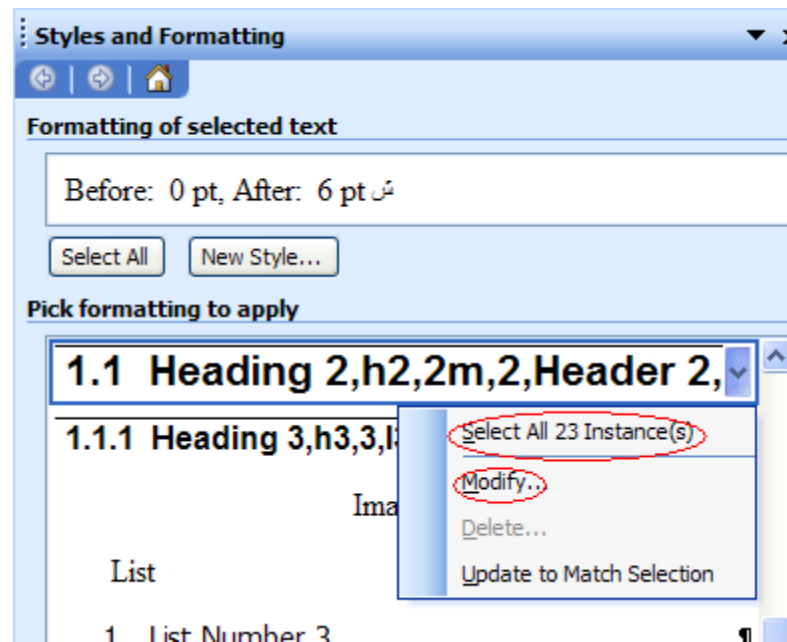


**Figure 2 Incorrect formatting changes**



The use of the Styles and Formatting windows (Figure 3 Selecting/Modifying a style) allows the style to be modified. The use of 'Select All...' is an easy way of converting one paragraph format (perhaps non standard) to a standard paragraph format.

**Figure 3 Selecting/Modifying a style**



### 2.4.1 Suggested styles:

**Headings:** Heading 1, Heading 2, Heading 3, ... (see above)

*Note:* Heading 1 is preceded by a page break.

**Body text:**

Normal

Normal Indent

**Bullets:**

- List Bullet
  - List Bullet 2
  - List Bullet 3

**Lists:**

List (unnumbered)

1. List Number (numbered list)

- a. List Number 2 : Unfortunately, there doesn't seem to be a way of generating a style which restarts numbering, so if you wish to start a new list you will need to manually restart the numbering by right click.

**Notes:**

*Note:* Note

Use the following styles for tables. Add a caption, and refer to it in the text by Insert->Reference->Cross-Reference (entire caption) Table 2 Insert->Reference->Caption.

Table_Heading	Table->Heading Rows Repeat	20% Grey shading
Table	Table	Table
Table	Table	Table
Table	Table	Table
Table	Table	Table

**Table 2 Insert->Reference->Caption**

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## 3 Project Processes

### 3.1 Project Naming

To name projects, we will use the following convention: Two character prefix of the customer followed by 4 digit project number. A register of projects will be kept.

### 3.2 File naming

On Windows, use Capitals for the first part of each word, and spaces between words. The file version starts with v. If the date is included in the file name, use yyyy-mm-dd, e.g., 2009-04-20

### 3.3 File versions

Documents should use version control for tracking, starting at 0.1. Whole number versions are used when the document is released to the customer.

### 3.4 File compression

The standard ZIP compression should be used for files. When sending emails, if the attachments are >500k, the attachments should be zipped together.