



**CWDS**  
Child Welfare Digital Services

# **CWDS**

## **Knowledge Management ITIL High Level Design**

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## 1. Introduction

The purpose of this document is to provide a High Level or Management view of the CWDS Knowledge Management (KM) process. The KM High Level Process Flow diagram is the focal point for this document, with a corresponding section that defines each of the KM High Level Process Activities.

Global Process Policies spanning the entire KM Process, decided and agreed upon by the CWDS KM Process Team, define the expected behavior for each OSI division (internal and external) with responsibilities for the day-to-day process operations.

Touch points with other Service Management Lifecycle Stages are listed in the final section. These touch points identify process inputs and outputs that are necessary for successful KM operations. The KM Process Team should consider these inputs and outputs, regardless of organizational plans to fully implement additional processes.

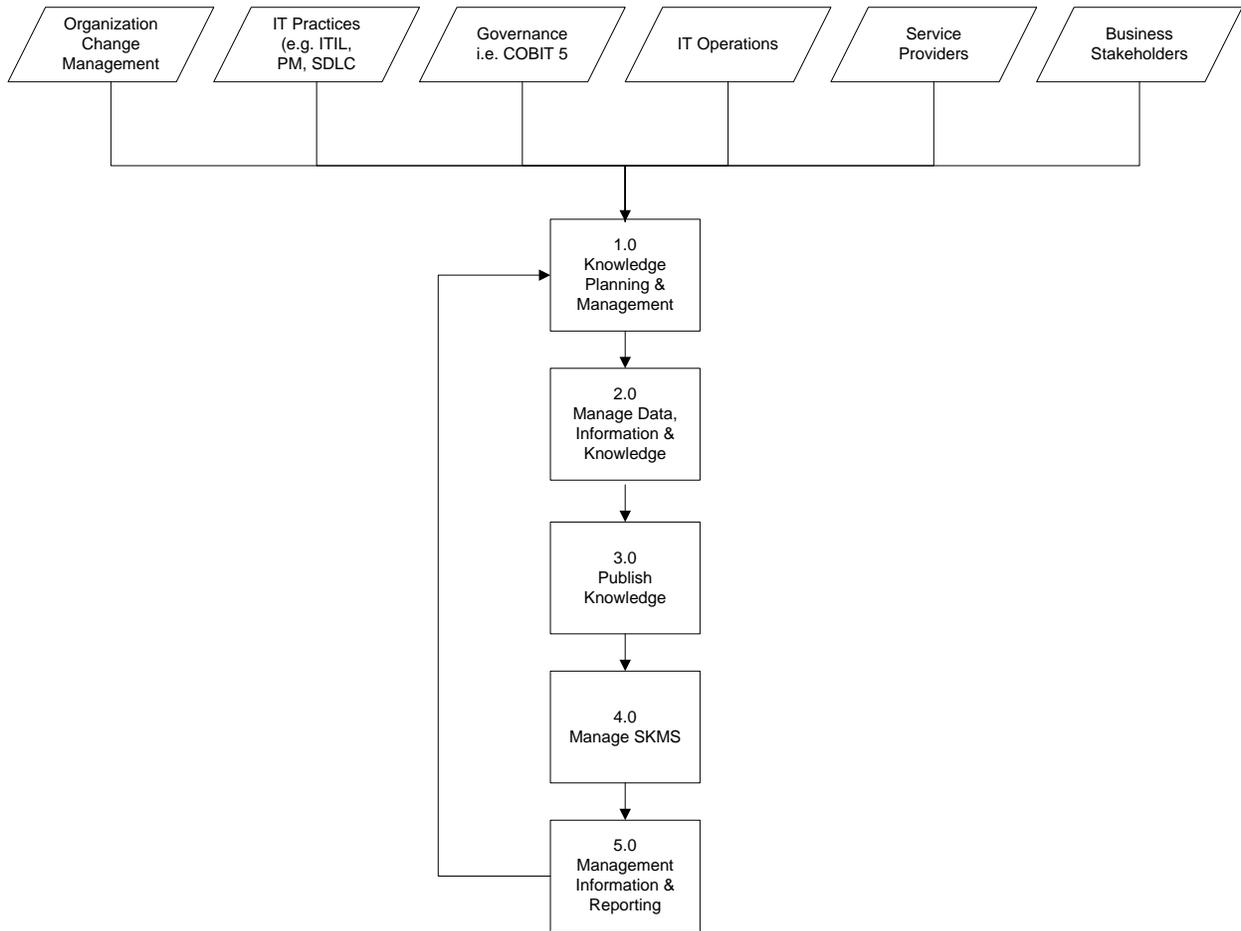
The content within this document is based on the ITIL<sup>®</sup> framework<sup>1</sup>.

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<sup>1</sup> ITIL<sup>®</sup> is a registered trade mark of AXELOS Limited.

## 2. High Level Knowledge Management Process Flow

At a very high level, there are five activities for the KM process. These five process activities are illustrated in the Knowledge Management High Level Process Flow diagram below.



### 3. Knowledge Management High Level Process Activity Descriptions

The table on the following pages provides a description of each activity<sup>2</sup> in the Knowledge Management high level process flow diagram.

**A key input to the entire KM process is the Knowledge Strategy and Policy, defined by the Strategy in the Service Strategy Lifecycle.**

<i>Activity</i>	<i>Description</i>
<p><b>1.0 Knowledge Planning &amp; Management</b></p>	<p>This activity is responsible for developing an overarching plan for KM designed to fit within the overall organizational approach to knowledge and services.</p> <p>Initiation of a KM plan requires that all <b>knowledge requirements</b> pertaining to the planning, designing, building and delivery of IT services to customers as well as the consumption of services by the customers/users be defined. Defining knowledge requirements necessitates the <b>identification of all stakeholders</b> of KM. This includes those who will enable the capture/management of underlying data and information as well as their sources. It includes all processes within the ITIL service lifecycle as well as other practices within OSI such as Program/Project Management, Application Development (e.g. Agile, etc.), COBIT®. Stakeholders also include the custodians of the system management, monitoring and service management tools that comprise the Configuration Management System (CMS) as these tools provide a significant amount of data, information and knowledge that the KM process is dependent on.</p> <p>Once the <b>sources of data and information are identified</b> and the knowledge requirements of all stakeholders is defined, the next step in the KM Plan is to <b>define and create the Information Architecture</b>. This is based on the Data &gt; Information &gt; Knowledge &gt; Wisdom (DIKW) concept, otherwise known as the Service Knowledge Management System (referred to in this document as the SKMS) that encompasses all sources of data, information and knowledge within the IT organization as well as the capabilities for transforming data into information and information into knowledge. A critical aspect of the SKMS is <b>identification and creation of the delivery mechanism /media</b> that will enable all stakeholders to access and use the data, information and knowledge that exists within the SKMS. Users of data, information and knowledge will be able to access captured knowledge primarily in ServiceNow, CWS-C.A.R.E.S., GitHub and WIKI.</p> <p>The Plan should also include the Measurement Framework that will enable the KM Process to monitor and assess all aspects of knowledge</p>

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<sup>2</sup> Adapted from ITIL Service Transition 4.7.5

<i>Activity</i>	<i>Description</i>
	<p>creation and maintenance. Consumption across the entire service lifecycle, identification of improvement opportunities and maintaining a robust and highly utilized SKMS will be monitored and assessed as well.</p> <p>Defining Stakeholder and stakeholder requirements for knowledge, identifying sources of data and information, creating the SKMS architecture and defining delivery mechanisms/media for the knowledge are finally incorporated into the KM Plan.</p>
<p><b>2.0</b> <b>Manage Data, Information &amp; Knowledge</b></p>	<p>The execution of the KM Plan begins with identifying specific knowledge artifacts that are required and establishing the specific data and information sources that will feed these Knowledge Artifacts (referred to as KA in this document). Where there are existing KA, the content will be reviewed to confirm accuracy and relevance and/or identify changes or updates to the content that may be required. Based on this review, KA may be modified or if they are no longer required they will be archived.</p> <p>In the event that a gap in knowledge is found, a new KA will be identified and created. In either case, whether updating existing KA or creating new KA it is important to define/revise links to sources of data as well as define/revise delivery mechanisms and content format as required by the stakeholders.</p>
<p><b>3.0</b> <b>Publish Knowledge</b></p>	<p>Once the knowledge has been captured in a KA, it is published according to the Knowledge Plan specifications.</p> <p>In making knowledge available and useful to those dependent on it, publication has to address a multitude of requirements. The format of the content of the KA, the tools and/or media to be used to access and use the KA should be identified for every KA. The following attributes will determine how the KA is published for consumption by stakeholders:</p> <ol style="list-style-type: none"> <li>1) Nature and purpose of the knowledge. The knowledge could be needed to execute an operational activity (e.g. incident resolution or change approval); it could be needed to plan activities (e.g. lessons learned from previous projects as input into current project planning); it could be used to train the Service Desk on new or changed services or about application functionality; it could also populate self-help tools so that users can manage their own learning requirements.</li> <li>2) Delivery methods will vary depending on stakeholder preferences and needs. For example, knowledge to be consumed in a training program may be presented in PowerPoint presentations to be delivered by a trainer; it may also include detailed user notes to go with the presentation and a user manual</li> </ol>

<i>Activity</i>	<i>Description</i>
	<p>for future reference following the training. In other cases, the knowledge may be contained in artifacts which will be contained within ServiceNow.</p> <p>3) Existing technology capabilities and solutions will drive publication choices; internal websites such as intranet, GitHub, WIKI, SharePoint, etc., that are the preferred knowledge source by stakeholders will dictate how the knowledge is made available.</p>
<p><b>4.0</b> <b>Manage SKMS</b></p>	<p>Providing services to customers 24x7x365 requires good knowledge-sharing across all locations and time periods of service operation. OSI must first establish a SKMS that can be shared, updated and used by its operating entities, partners and customers.</p> <p>Implementing an SKMS helps to reduce the costs of maintaining and managing the services, both by increasing the efficiency of operational management procedures and by reducing the risks that arise from the lack of proper mechanisms.</p> <p>Developing an overall detailed plan for the SKMS based on the defined information architecture, tools inventory and KM plan that collectively provide the requirements to be fulfilled by the SKMS.</p> <p>Developing Stakeholder centric view of the SKMS to understand the manner in which data, information and knowledge will be consumed is well established. For example:</p> <ul style="list-style-type: none"> <li>• All training and knowledge material needs to be aligned to the business perspective. Materials that can be included are: <ul style="list-style-type: none"> <li>○ The business language and terminology and how IT terminology is translated</li> <li>○ The business processes and where IT underpins them</li> <li>○ Any SLAs, supporting agreements or contracts that would change as a result of the new service transition – this is especially important for the service desk analysts whose target at support transition will be to sustain service; if classifications are accurate this will facilitate the whole process.</li> </ul> </li> <li>• For those in the service transition process a good way of consolidating understanding is to either spend time with the DevOps Team members, taking part in some of the testing processes, or to spend time in the business at the receiving end of the service transition to understand the process from the business perspective. Materials that can be included are: <ul style="list-style-type: none"> <li>○ Process maps to understand all the integrated activities</li> <li>○ Any known error logs and workarounds are particularly important for the Service Desk</li> </ul> </li> </ul>

<i>Activity</i>	<i>Description</i>
	<ul style="list-style-type: none"> <li>○ Business and other public calendars</li> <li>● Technology for service desks and customer service needs to make it easier for customers, users and Service Desk Analysts               <ul style="list-style-type: none"> <li>○ There are significant developments in the service management industry to develop mature, process-oriented business applications (ServiceNow) supported by comprehensive knowledge bases</li> </ul> </li> <li>● Potential benefits are:               <ul style="list-style-type: none"> <li>○ <b>Service Desk efficiency;</b> the largest component of Return On Investment (ROI) from KM is reduced incident-handling time and increased productivity</li> <li>○ <b>Self-service;</b> a comprehensive SKMS provides the customer with knowledge directly on the support website; the cost of self-service is an order of magnitude lower than assisted service</li> </ul> </li> </ul> <p>Configuring the service management, systems management and any other tools to be used within the SKMS so they are fully integrated and capable of processing data and information and producing relevant, up-to-date and consumable knowledge.</p> <p>Maintain control of the SKMS by requiring all requests and changes to the SKMS to go through an approval process.</p>
<p><b>5.0 Management Information &amp; Reporting</b></p>	<p>Ensuring that KM process management information metrics are captured and stored, and that measurements are taken to be reported on a regular basis to KM Process management, IT management, and Business management.</p> <p>The focus of these measurements is on the health and value of the process; ensuring that the intended business value of the process is being achieved, and if not, what improvements should be enacted in order to achieve the intended business value. At a more tactical and operational level, the measurements can report on the activities and contributions of KM process staff members.</p> <ul style="list-style-type: none"> <li>● Measurement of the use made of the data and information management–data transactions</li> <li>● Evaluation of the usefulness of the data and information – identified by relevance of reports produced</li> <li>● Identification of any data or information or registered users that no longer seem relevant to the organization’s knowledge requirements.</li> </ul>

#### 4. Knowledge Management High Level Authority Matrix

An authority matrix (RACI, see legend below) is a tool used to help understand which parties are involved in activities and their level of involvement. Because this is a high level view, there are several levels of involvement shown. More detailed RACIs are provided in the detailed design.

Process Activities	Process Roles							
	Knowledge Management Process Owner	Knowledge Management Process Manager	Knowledge Management Practitioner (Librarian)	Knowledge Artifact Owner (SME)	Knowledge Artifact Consumer	SKMS Tool Administrator	Business /User Stakeholders	
1.0 Knowledge Planning & Management	A	R	R	C,I	C, I	C, I	C	
2.0 Manage Data, Information & Knowledge	A	R	R	R	C, I	C, I	C, I	
3.0 Publish Knowledge	A	R	R	C,I	C, I	C, I	C, I	
4.0 Manage SKMS	A	R, I	R	C,I	C,I	R	C, I	
5.0 Management Information and Reporting	A,I	R,I	R	C,I	C, I	I	I	

Legend:

**R** = Responsible: Executes the task

**A** = Accountable: Accountable for final result

**C** = Consulted: Consulted about the task to provide additional information

**I** = Informed: Needs to be kept up-to-date on activities/tasks

## 5. Global Process Policies for Knowledge Management

KM Global Process Policies represent decisions made by the KM Process Owner and KM project team for end-to-end management and execution of the KM Process. All technologies, organizations and staff defined in CWDS KM Scope are expected to adhere to these Global Policies.

The KM Global Process Policies are designed to ensure that all OSI divisions (internal and external) work together to successfully meet OSI KM Goals. Policies required to support external regulations (i.e. Legislation) and/or business customer requirements are also included.

The KM Global Process Policies are owned and monitored by the KM Process Owner. They will provide Management Information to senior and mid-level managers to demonstrate overall process effectiveness and efficiency, compliance at an organizational level and compliance at a department and individual level. The KM Process Owner is also accountable for ensuring that Global Policies add value to the organization and are reviewed and updated on a regular basis.

The following table provides a list of Global Process Policies for KM. These should be discussed, modified (if necessary) and agreed among the Service Management Program Team, KM Process Owner, and KM Process Implementation Team. The KA Owner is accountable to ensure end-to-end compliance to these policies. In this position the KA Owner must have the authority to make sure middle-management holds its teams accountable for effective and efficient execution of KM Activities.

<b>Policy Statement</b>	<b>Reason For Policy</b>	<b>Benefits</b>
One KM process based on the ITIL framework will be utilized throughout OSI.	<p>Providing effectiveness and efficiency in performing KM activities in support of Service Management.</p> <p>Ensuring a consistent and repeatable KM process.</p>	<ul style="list-style-type: none"> <li>• Consistency in policies and procedures related to KM</li> <li>• Improved knowledge communication and relationships</li> <li>• Improved KM information</li> <li>• Improved data collection</li> <li>• Improved management information</li> <li>• Improved resource utilization</li> <li>• Improved decision - making capability</li> </ul>
There will be one tool (ServiceNow) to log and track Information and	Providing effectiveness and efficiency in performing KM activities.	<ul style="list-style-type: none"> <li>• Improved data collection</li> <li>• Improved Management information</li> </ul>

Policy Statement	Reason For Policy	Benefits
<p>Knowledge.</p> <p>The tool set includes a KM tool that uses data from a Configuration Management System (CMS).</p>		<ul style="list-style-type: none"> <li>• Improved decision-making capability</li> </ul>
<p>The KM Process Owner is accountable for the entire KM process and has the authority to develop policies and procedures pertaining to the process.</p>	<p>Provides a single point of accountability for the KM process across OSI.</p>	<ul style="list-style-type: none"> <li>• Consistent execution of the KM process across OSI</li> </ul>
<p>Knowledge Base must capture pertinent information presented by the customer as it is reported.</p> <p>The process to document information as it is captured continues throughout the lifecycle of the service.</p>	<p>Capturing information as it is reported is fundamental to Knowledge and Service Management.</p> <p>Driving the efficiency of the process and ensuring that the content created is relevant to the audience.</p>	<ul style="list-style-type: none"> <li>• Capturing information as it is reported, as you do the work, allows you to capture tacit or implicit knowledge and convert it to explicit (written and formalized) knowledge. This crucial step can only be accomplished at the moment of the question when insight occurs</li> <li>• Capturing information at the time of the question allows organizations to tap into the real knowledge and experience of OSI</li> </ul>
<p>All entries into the Knowledge Base must adhere to established content standards. These standards will be enforced and supported through random sampling of Knowledge Base entries.</p> <p>Content standards specifically address how to categorize and state information to create findable and usable Knowledge Base entries.</p>	<p>Increasing the likelihood that the data will be found and matched to similar incidents and/or problems when a search is performed.</p> <p>Adhering to the standards also results in more usable content.</p>	<ul style="list-style-type: none"> <li>• Content standards help to preserve and keep the data in the Knowledge Base clean</li> <li>• Standards increase readability or clarity of the content (quality)</li> <li>• Allows for reuse of existing content or phrases resulting in less work and greater consistency (time)</li> <li>• Creates a format in which Knowledge Base users can be prompted</li> </ul>

Policy Statement	Reason For Policy	Benefits
		<p>with questions that will aid in the diagnosis of an issue. This is hugely beneficial, as the results presented change dynamically as more information is added to the search, each time prompting the staff member with even more appropriate questions to ask or validate (time)</p> <ul style="list-style-type: none"> <li>• Structure gives context to content (ability to find and reuse)</li> </ul>
<p>KM will produce reports that reflect the results of KM activities against the defined Key Performance Indicators and Activity Metrics. Analysis of the report data is required. Reports also support Continuous Process Improvement activities.</p>	<p>Providing Management Information on the health, adoption, and value of the KM process.</p>	<ul style="list-style-type: none"> <li>• Ability to assess the progress of the KM process</li> <li>• Identify process improvement opportunities</li> <li>• Identify opportunities to provide training on the process</li> </ul>
<p>A relevant data architecture that includes a knowledge classification structure should be established and adopted across the organization.</p>	<p>Reducing the possibility of capturing data that has limited relevance or little value.</p>	<p>Properly classified knowledge is easier to search enabling users to get value from knowledge</p>
<p>There shall be an overall strategy, goals and approach for KM that is documented, communicated and used across the organization.</p>	<p>Ensuring that reliable and secure data, information and knowledge is available throughout the service lifecycle.</p>	<p>Improves the quality of management decision making</p>
<p>Policies and practices for transferring knowledge to other parts of OSI will be fully documented and adhered to by all divisions within OSI (e.g., transferring knowledge of problems and workarounds from DevOps to the CWDS Service Desk).</p>	<p>Reducing the need to rediscover knowledge.</p>	<p>Enables OSI to be more efficient and improves the quality of service, increases satisfaction and reduces the cost of service</p>
<p>Ongoing evaluations of the</p>	<p>Reducing the incidence of</p>	<ul style="list-style-type: none"> <li>• Creates more focused</li> </ul>

<b>Policy Statement</b>	<b>Reason For Policy</b>	<b>Benefits</b>
<p>reasons to collect different types of data, how it will be used and that the value it brings is greater than the cost to collect and maintain it shall be performed on a planned basis.</p>	<p>capturing data where value has diminished over time and becomes irrelevant.</p>	<p>and faster searches</p> <ul style="list-style-type: none"> <li>• Only data with value is retained</li> <li>• Saves time and reduces cost</li> </ul>
<p>Audits of KM data should be conducted regularly to ensure accuracy, relevance, completeness and that the data continues to provide value to OSI.</p>	<p>Providing part of process governance.</p>	<p>Ensures that data captured continues to have value</p>

## **6. Applicable COBIT® (Control Objective for Information and related Technology) Management Practices<sup>3</sup>**

The COBIT 5.0 management practices that correspond most closely to the Knowledge Management process are the following<sup>4</sup>:

### **Build, Acquire & Implement (BAI)**

#### **BAI08 Manage Knowledge**

Maintain the availability of relevant, current, validated and reliable knowledge to support all process activities and to facilitate decision making. Plan for the identification, gathering, organizing, maintaining, use and retirement of knowledge.

##### **BAI08.01 Nurture & Facilitate A Knowledge-Sharing Culture**

Devise and implement a scheme to nurture and facilitate a knowledge-sharing culture.

##### **BAI08.02 Identify & Classify Sources of Information**

Identify, validate and classify diverse sources of internal and external information required to enable effective use and operation of business processes and IT services.

##### **BAI08.03 Organize & Contextualize Information into Knowledge**

Organize information based on classification criteria. Identify and create meaningful relationships between information elements and enable use of information. Identify owners and define and implement levels of access to knowledge resources.

##### **BAI08.04 Use & Share Knowledge**

Propagate available knowledge resources to relevant stakeholders and communicate how these resources can be used to address different needs (e.g. problem solving, learning, strategic planning and decision making).

##### **BAI08.05 Evaluate & Retire Information**

Measure the use and evaluate the currency and relevance of information. Retire obsolete information.

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<sup>3</sup> COBIT® is a trademark of ISACA® registered in the United States and other countries.

<sup>4</sup> Source: "COBIT 5 Enabling Processes", 2012, ISACA

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## **7. Integration Across the Service Lifecycle**

Knowledge Management has interfaces to every other service management process in every stage of the lifecycle. The SKMS can only be effective if all processes and activities use it to store and manage their information and data, so that the maximum value can be extracted. Even processes that manage their data and information separately should still use KM concepts and activities to manage these.

To ensure maximum value and effectiveness all of the data and information from the other service management processes through every stage of the lifecycle should be stored and managed in the SKMS. For the processes where this is not possible, every effort should be made to ensure the concepts that apply for KM are adopted in the management of data and information.

The following tables describe key sample areas where KM interacts and integrates with other lifecycle stages where KM provides knowledge inputs and receives knowledge outputs or triggers presented by one process for another.

### 7.1. Service Strategy Knowledge Management Inputs & Outputs

<b>Lifecycle Stage</b>	<b>Service Strategy KM Inputs (from the lifecycle stages in the first column)</b>	<b>Service Strategy KM Outputs (to the lifecycle stages in the first column)</b>
Service Design	<ul style="list-style-type: none"> <li>• Input to business cases and the service portfolio</li> <li>• Service Design Packages (SDP)</li> <li>• Updated service models</li> <li>• Service portfolio updates including the service catalog</li> <li>• Financial estimates and reports</li> <li>• Design-related knowledge and information in the SKMS</li> <li>• Designs for service strategy processes and procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Service charters including service packages and details of utility and warranty</li> <li>• Financial information and budgets</li> <li>• Documented patterns of business activity and user profiles</li> <li>• Service models</li> </ul>
Service Transition	<ul style="list-style-type: none"> <li>• Transitioned services</li> <li>• Information and feedback for business cases and service portfolio</li> <li>• Response to change proposals</li> <li>• Service portfolio updates</li> <li>• Change schedule</li> <li>• Feedback on strategies and policies</li> <li>• Financial information for input to budgets</li> <li>• Financial reports</li> <li>• Knowledge and information in the SKMS</li> </ul>	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Change proposals, including utility and warranty requirements and expected timescales</li> <li>• Financial information and budgets</li> <li>• Input to change evaluation and CAB meetings</li> </ul>
Service Operation	<ul style="list-style-type: none"> <li>• Operating risks</li> <li>• Operating cost information for Total Cost of Ownership (TCO) calculations</li> <li>• Actual performance data</li> </ul>	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Financial information and budgets</li> <li>• Demand forecasts and strategies</li> <li>• Strategic risks</li> </ul>

<b>Lifecycle Stage</b>	<b>Service Strategy KM Inputs (from the lifecycle stages in the first column)</b>	<b>Service Strategy KM Outputs (to the lifecycle stages in the first column)</b>
Continual Service Improvement	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to business cases and the service portfolio</li> <li>• Feedback on strategies and policies</li> <li>• Financial information regarding improvement initiatives for input to budgets</li> <li>• Data required for metrics, Key Performance Indicators (KPI's) and Critical Success Factors (CSF's)</li> <li>• Service reports</li> <li>• RFC's for implementing improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Financial information and budgets</li> <li>• Patterns of business activity</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the Continual Service Improvement (CSI) register</li> </ul>

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Based on Table 3.21 Service Strategy 3.9

## 7.2. Service Design Knowledge Management Inputs & Outputs

<b>Lifecycle stage</b>	<b>Service Design KM inputs (from the lifecycle stage in the first column)</b>	<b>Service Design KM outputs (to the lifecycle stage in the first column)</b>
Service Strategy	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Service charters including service packages and details of utility and warranty</li> <li>• Financial information and budgets</li> <li>• Documented patterns of business activity and user profiles</li> </ul>	<ul style="list-style-type: none"> <li>• Input to business cases and the service portfolio</li> <li>• SDP</li> <li>• Updated service models</li> <li>• Service portfolio updates including the service catalog</li> <li>• Financial estimates and reports</li> <li>• Design-related knowledge and information in the SKMS</li> <li>• Designs for service Strategy processes and procedures</li> </ul>

	<ul style="list-style-type: none"> <li>• Service models</li> </ul>	
Service Transition	<ul style="list-style-type: none"> <li>• Service catalog updates</li> <li>• Feedback on all aspects of Service Design and SDP</li> <li>• Input and feedback to transition plans</li> <li>• Response to RFC's</li> <li>• Knowledge and information in the SKMS (including the CMS)</li> <li>• Design errors identified in transition for re-design</li> <li>• Evaluation reports</li> </ul>	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• SDP, including: <ul style="list-style-type: none"> <li>○ Details of utility and warranty</li> <li>○ Acceptance criteria</li> <li>○ Service models</li> <li>○ Designs and interface specifications</li> <li>○ Transition plans</li> <li>○ Operation plans and procedures</li> </ul> </li> <li>• RFC's to transition or deploy new or changed services</li> <li>• Input to change evaluation and CAB meetings</li> <li>• Designs for service transition processes and procedures</li> <li>• SLAs, OLAs and underpinning contracts</li> </ul>
Service Operation	<ul style="list-style-type: none"> <li>• Operational requirements</li> <li>• Actual performance information</li> <li>• RFC's to resolve operational issues</li> <li>• Historical incident and problem records</li> </ul>	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• Service design package, including: <ul style="list-style-type: none"> <li>○ Details of utility and warranty</li> <li>○ Operations plans and procedures</li> <li>○ Recovery procedures</li> </ul> </li> <li>• Knowledge and information in the SKMS</li> <li>• Vital business functions</li> <li>• HW/SW maintenance requirements</li> <li>• Designs for service operation processes and procedures</li> <li>• Service Level Agreements (SLAs), Operational Level Agreements (OLAs) and underpinning contracts</li> <li>• Security policies</li> </ul>
Continual Service Improvement	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to Design requirements</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• Service reports</li> <li>• Feedback on SDP</li> <li>• RFC's for implementing improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• SDP including details of utility and warranty</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Design of services; measurements; processes; infrastructure; systems</li> <li>• Design for the seven-step improvement process and procedures</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>

Based on Table 3.7 Service Design 3.12

### 7.3. Service Transition Knowledge Management Inputs & Outputs

<b>Lifecycle stage</b>	<b>Service Transition KM inputs (from the lifecycle stages in the first column)</b>	<b>Service Transition KM outputs (to the lifecycle stages in the first column)</b>
Service Strategy	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Change proposals, including utility and warranty requirements and expected timescales</li> <li>• Financial information and budgets</li> <li>• Input to change evaluation and CAB meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Transitioned services</li> <li>• Information and feedback for business cases and service portfolio</li> <li>• Response to change proposals</li> <li>• Service portfolio updates</li> <li>• Change schedule</li> <li>• Feedback on strategies and policies</li> <li>• Financial information for input to budgets</li> <li>• Financial reports</li> <li>• Knowledge and information in the SKMS</li> </ul>
Service Design	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• SDP, including:                             <ul style="list-style-type: none"> <li>○ Details of utility and warranty</li> <li>○ Acceptance criteria</li> <li>○ Service models</li> <li>○ Designs and interface specifications</li> <li>○ Transition plans</li> <li>○ Operation plans and procedures</li> </ul> </li> <li>• Requests for change (RFCs) to transition or deploy new or changed services</li> <li>• Input to change evaluation and CAB meetings</li> <li>• Designs for service transition processes and procedures</li> <li>• Service level agreements, operational level agreements and underpinning contracts</li> </ul>	<ul style="list-style-type: none"> <li>• Service catalog updates</li> <li>• Feedback on all aspects of Service Design and SDP</li> <li>• Input and feedback on transition plans</li> <li>• Response to RFCs</li> <li>• Knowledge and information in the SKMS (including the CMS)</li> <li>• Design errors identified in transition for re-design</li> <li>• Evaluation reports</li> </ul>
Service Operation	<ul style="list-style-type: none"> <li>• RFC's to resolve operational issues</li> <li>• Feedback on quality of transition activities</li> <li>• Input to operational testing</li> <li>• Actual performance information</li> <li>• Input to change evaluation and CAB meetings</li> </ul>	<ul style="list-style-type: none"> <li>• New or changed services</li> <li>• Known errors</li> <li>• Standard changes for use in request fulfillment</li> <li>• Knowledge and information in the SKMS (including the CMS)</li> <li>• Change schedule</li> </ul>

<b>Lifecycle stage</b>	<b>Service Transition KM inputs (from the lifecycle stages in the first column)</b>	<b>Service Transition KM outputs (to the lifecycle stages in the first column)</b>
Continual Service Improvement	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to testing requirements</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• Input to change evaluation and CAB meetings</li> <li>• Service reports</li> <li>• RFC's for implementing improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Test reports</li> <li>• Change evaluation reports</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the continual service improvement register</li> </ul>

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Based on Table 3.1 Service Transition 3.3

#### 7.4. Service Operation Knowledge Management Inputs & Outputs

<b>Lifecycle stage</b>	<b>Service Operation KM inputs (from the lifecycle stages in the first column)</b>	<b>Service Operation KM outputs (to the lifecycle stages in the first column)</b>
Service Strategy	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Financial information and budgets</li> <li>• Demand forecasts and strategies</li> <li>• Strategic risks</li> </ul>	<ul style="list-style-type: none"> <li>• Operating risks</li> <li>• Operating cost information for TCO calculations</li> <li>• Actual performance data</li> </ul>
Service Design	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• SDP, including:                             <ul style="list-style-type: none"> <li>○ Details of utility and warranty</li> <li>○ Operations plans and procedures</li> <li>○ Recovery procedures</li> </ul> </li> <li>• Knowledge and information in the SKMS</li> <li>• Vital business functions</li> <li>• Hardware and software maintenance requirements</li> <li>• Designs for service operation</li> </ul>	<ul style="list-style-type: none"> <li>• Operational requirements</li> <li>• Actual performance data</li> <li>• RFC's to resolve operational issues</li> <li>• Historical incident and problem records</li> </ul>

<b>Lifecycle stage</b>	<b>Service Operation KM inputs (from the lifecycle stages in the first column)</b>	<b>Service Operation KM outputs (to the lifecycle stages in the first column)</b>
	<ul style="list-style-type: none"> <li>processes and procedures</li> <li>• SLAs, OLAs and underpinning contracts</li> <li>• Security policies</li> </ul>	
Service Transition	<ul style="list-style-type: none"> <li>• New or changed services</li> <li>• Known errors</li> <li>• Standard changes for use in request fulfillment</li> <li>• Knowledge and information in the SKMS (including the CMS)</li> <li>• Change schedule</li> </ul>	<ul style="list-style-type: none"> <li>• RFC's to resolve operational issues</li> <li>• Feedback on quality of transition activities</li> <li>• Input to operational testing</li> <li>• Actual performance information</li> <li>• Input to change evaluation and change advisory board meetings</li> </ul>
Continual Service Improvement	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Service reports and dashboards</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• RFC's for implementing improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Operational performance data and service records</li> <li>• Proposed problem resolutions and proactive measures</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>

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Based on Table 3.5 Service Operation 3.8

### 7.5. CSI Knowledge Management Inputs & Outputs

<b>Lifecycle stage</b>	<b>CSI KM inputs (from the lifecycle stages in the first column)</b>	<b>CSI KM outputs (to the lifecycle stages in the first column)</b>
Service Strategy	<ul style="list-style-type: none"> <li>• Vision and mission</li> <li>• Service portfolio</li> <li>• Policies</li> <li>• Strategies and strategic plans</li> <li>• Priorities</li> <li>• Financial information and budgets</li> <li>• Patterns of business activity</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to business cases and the service portfolio</li> <li>• Feedback on strategies and policies</li> <li>• Financial information regarding improvement initiatives for input to budgets</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• Service reports</li> </ul>

Lifecycle stage	CSI KM inputs (from the lifecycle stages in the first column)	CSI KM outputs (to the lifecycle stages in the first column)
		<ul style="list-style-type: none"> <li>• RFC's for implementing improvements</li> </ul>
Service Design	<ul style="list-style-type: none"> <li>• Service catalog</li> <li>• SDP including details of utility and warranty</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Design of services, measurements, processes, infrastructure and systems</li> <li>• Design for the seven-step improvement process and procedures</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to Design requirements</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• Service reports</li> <li>• Feedback on SDP</li> <li>• RFC's for implementing improvements</li> </ul>
Service Transition	<ul style="list-style-type: none"> <li>• Test reports</li> <li>• Change evaluation reports</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Input to testing requirements</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• Input to change evaluation and CAB meetings</li> <li>• Service reports</li> <li>• RFC's for implementing improvements</li> </ul>
Service Operation	<ul style="list-style-type: none"> <li>• Operational performance data and service records</li> <li>• Proposed problem resolutions and proactive measures</li> <li>• Knowledge and information in the SKMS</li> <li>• Achievements against metrics, KPI's and CSF's</li> <li>• Improvement opportunities logged in the CSI register</li> </ul>	<ul style="list-style-type: none"> <li>• Results of customer and user satisfaction surveys</li> <li>• Service reports and dashboards</li> <li>• Data required for metrics, KPI's and CSF's</li> <li>• RFC's for implementing improvements</li> </ul>