

Service Management

Mihai Pascadi

Main source of information: APQC – Process Classification Framework basis for process-related information in the course

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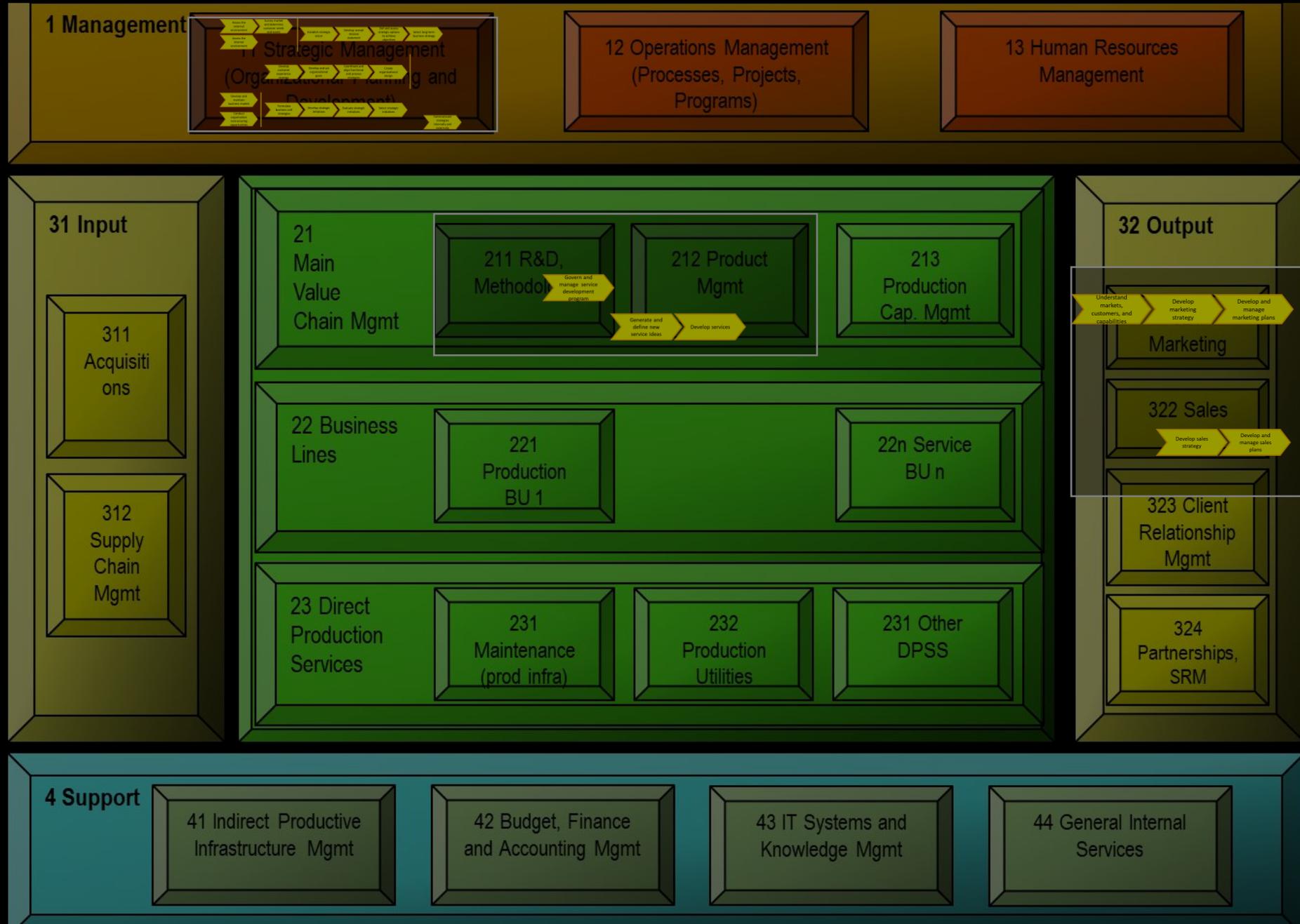
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Sem 5,6

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Until now:
 Strategic Planning, Develop and Manage Services
 Process Group, The Marketing and Sales Processes
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The **Deliver Services** Process Group

- Offering services to customers.
- This is the act of providing **service** delivery
 - as a **core business** practice and covers
 - identifying **strategies** for
 - performing service **delivery**,
 - managing **resources**, and
 - delivering services to the customer.

The Deliver Services Process Group



Quiz
subject

Until now:
 Strategic Planning, Develop and Manage Services
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Quiz
 subject

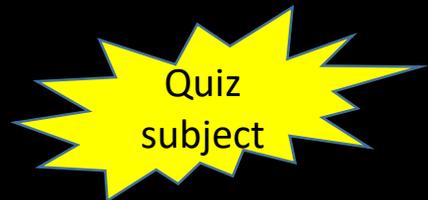


The Deliver Services Process Group



The Establish service delivery governance and strategies Process

- Creating **rules** and regulations for service delivery to the customer.
- Establish a **system to manage**
 - **performance**,
 - **delivery**, and
 - **direction** of service delivery.
- Engage with the customer for satisfaction feedback.
- Define
 - **goals**,
 - **policies**,
 - **processes**, and
 - **workplace** layout and
 - **infrastructure**as a part of the service delivery strategy.



The Establish service delivery governance and strategies Process

- Subprocesses:
 - Establish service delivery governance
 - Develop service delivery strategies



The Establish service delivery governance and strategies Process

- Subprocesses:
 - Establish service delivery governance
 - Develop service delivery strategies



The Establish service delivery governance Subprocess

Set up and maintain service delivery governance and management system

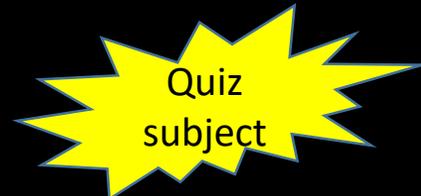
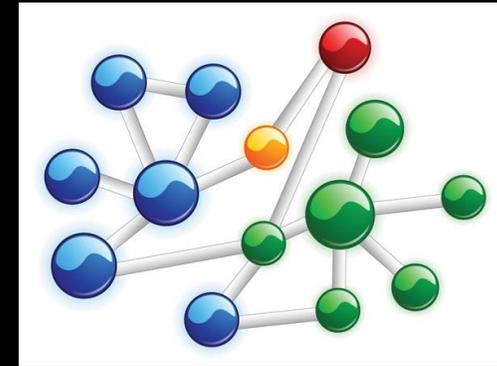
Manage service delivery performance

Manage service delivery development and direction

Solicit feedback from customer on service delivery satisfaction

- Providing

- a **system** for which to manage customer needs and
- a **structure** for which to facilitate service delivery to fulfill those needs.



The Establish service delivery governance Subprocess

Set up and maintain service delivery governance and management system

Manage service delivery performance

Manage service delivery development and direction

Solicit feedback from customer on service delivery satisfaction

- Conducting and implementing **performance measures** to ensure successful delivery of service to the customer.



The Establish service delivery governance Subprocess

Set up and maintain service delivery governance and management system

Manage service delivery performance

Manage service delivery development and direction

Solicit feedback from customer on service delivery satisfaction

- Providing guidance of **resources** to ensure that the development and direction of service delivery is in line with customer needs.



The Establish service delivery governance Subprocess

Set up and maintain service delivery governance and management system

Manage service delivery performance

Manage service delivery development and direction

Solicit feedback from customer on service delivery satisfaction



- Engaging the customer **post delivery** to gauge the effectiveness of services rendered in order to **improve** on key delivery functions going forward.



The Establish service delivery governance and strategies Process

- Subprocesses:
 - Establish service delivery governance
 - Develop service delivery strategies

The Deliver Services Process Group



The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure

- **Aligning** organization practices
- to **meet** the needs of the customer
- by creating service delivery **goals**.



The Deliver Services Process Group



Quiz subject

The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure

- Outlining labor **policies** for resources and
- ensuring that those policies meet the needs of the
 - organization, the
 - customer, and
 - government regulations.



The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure

- Understanding the needs of the customer and
- providing the necessary **resources** to meet those requirements.



The Deliver Services Process Group



The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure



- Identifying and understanding the **limitations** imposed upon service delivery network and supply.



The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure



- Defining policies and procedures
- that **focus** on meeting the needs and expectations of the customer
- within the working parameters of the organization.



The Develop service delivery strategies Subprocess



- Defining policies and **procedures**
- that focus on meeting the **needs** and **expectations** of the customer
- within the working **parameters** of the organization.



The Develop service delivery strategies Subprocess

Define service delivery goals

Define labor policies

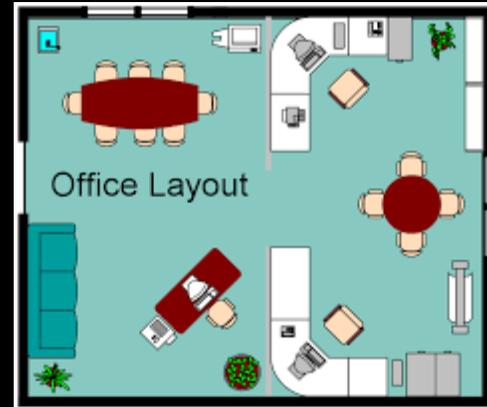
Evaluate resource availability

Define service delivery network and supply constraints

Define service delivery process

Review and validate service delivery procedures

Define service delivery workplace layout and infrastructure



- Creating a **workplace** that
- best serves the needs of the organization and customer
- through strategic layout and infrastructure.

The Deliver Services Process Group

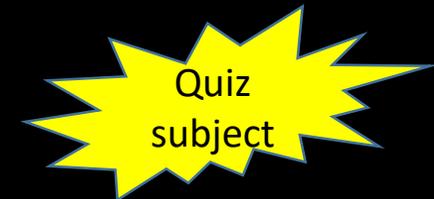


The Deliver Services Process Group



The Manage service delivery resources Process

- Understanding the **demands** on resources and
- creating a **plan** to enable the delivery of services via those resources.



The Manage service delivery resources Process

- Subprocesses:
 - Manage service delivery resource demand
 - Create and manage resource plan
 - Enable service delivery resources



The Manage service delivery resources Process

- Subprocesses:
 - Manage service delivery resource demand
 - Create and manage resource plan
 - Enable service delivery resources

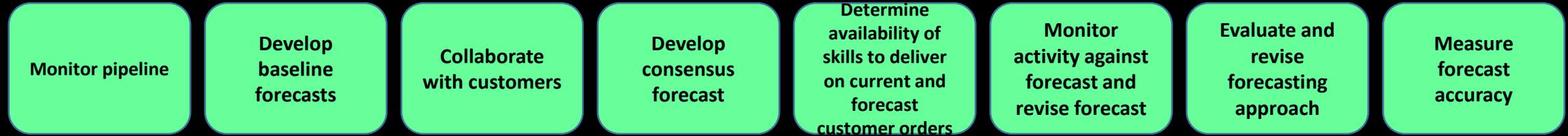


The Manage service delivery resource demand Subprocess

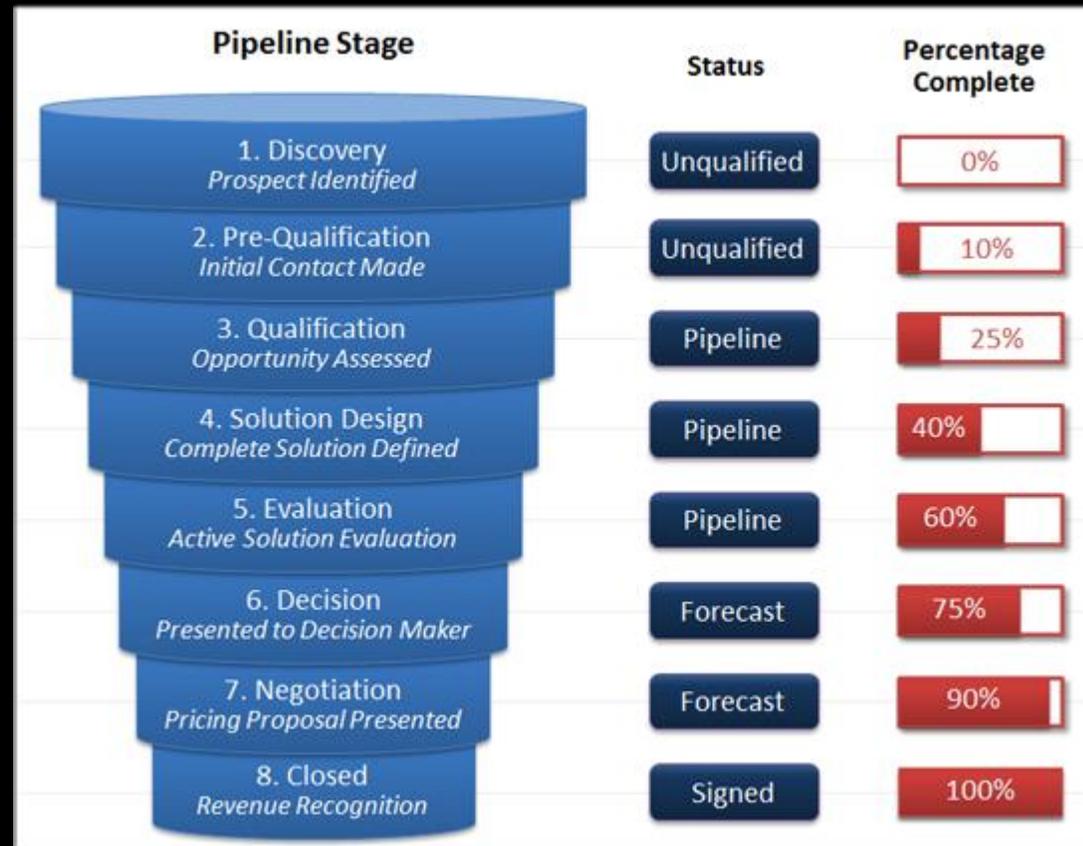
- Ensuring necessary resources are **maintained** through monitoring pipeline,
 - developing **forecasts**, and
 - collaborating with customers.
-
- Determine **skills** needed for service deliver and
 - forecast customer **orders**.
-
- Monitor forecasted orders and
 - **modify** if where needed.
-
- Measure forecast **accuracy**.



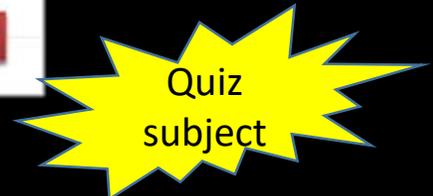
The Manage service delivery resource demand Subprocess



- Tracking potential **opportunities** as they move through the various stages of the pipeline.



The Deliver Services Process Group



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop
baseline
forecasts

Collaborate
with customers

Develop
consensus
forecast

Determine
availability of
skills to deliver
on current and
forecast
customer orders

Monitor
activity against
forecast and
revise forecast

Evaluate and
revise
forecasting
approach

Measure
forecast
accuracy

- Identifying the demand **anticipated** for the organization's services.
- **Estimate** future demand for services using
 - historical data,
 - analysis of the market environment, and
 - external data.



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop baseline forecasts

Collaborate with customers

Develop consensus forecast

Determine availability of skills to deliver on current and forecast customer orders

Monitor activity against forecast and revise forecast

Evaluate and revise forecasting approach

Measure forecast accuracy

- Providing a collaborative meeting in which
- to engage the customer to understand the **scope** of their needs and
- constructing **solutions** based on need and constraints.



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop
baseline
forecasts

Collaborate
with customers

Develop
consensus
forecast

Determine
availability of
skills to deliver
on current and
forecast
customer orders

Monitor
activity against
forecast and
revise forecast

Evaluate and
revise
forecasting
approach

Measure
forecast
accuracy



- Arriving at a **consensus** over the forecasted levels of demand for services by
 - analyzing baseline forecasts and
 - customer input.



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop
baseline
forecasts

Collaborate
with customers

Develop
consensus
forecast

Determine
availability of
skills to deliver
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Monitor
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revise forecast

Evaluate and
revise
forecasting
approach

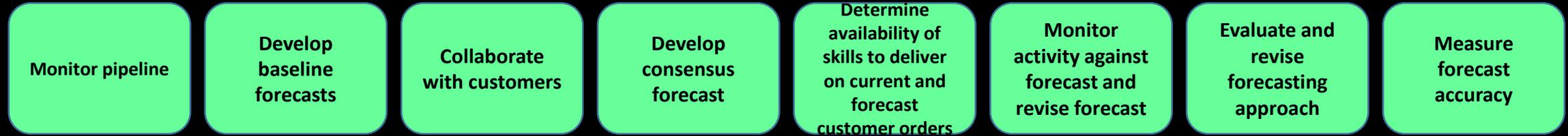
Measure
forecast
accuracy



- Identifying what **skillset** is necessary for the delivery of opportunities.
- Determine the forecast of customer orders based upon those skillsets and the resources available.



The Manage service delivery resource demand Subprocess



- Overseeing all **activities** necessary to deliver services to customer.
- Revise forecast to account for any **issues** that may arise.
 - This could be changes in market trend, resource changes, etc.



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop
baseline
forecasts

Collaborate
with customers

Develop
consensus
forecast

Determine
availability of
skills to deliver
on current and
forecast
customer orders

Monitor
activity against
forecast and
revise forecast

Evaluate and
revise
forecasting
approach

Measure
forecast
accuracy



- Recognizing potential **problems** in the current forecast and
- making the necessary **changes** to align the forecast meet demand.



The Manage service delivery resource demand Subprocess

Monitor pipeline

Develop
baseline
forecasts

Collaborate
with customers

Develop
consensus
forecast

Determine
availability of
skills to deliver
on current and
forecast
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Monitor
activity against
forecast and
revise forecast

Evaluate and
revise
forecasting
approach

Measure
forecast
accuracy



- Analyzing forecasting **against** actuals to determine accuracy.
- **Modify** forecasting to align with actual need.



The Manage service delivery resources Process

- Subprocesses:
 - Manage service delivery resource demand
 - **Create and manage resource plan**
 - Enable service delivery resources



The Create and manage resource plan Subprocess

- Identifying the need for and creating a resource plan.
- Understand resource demand and align with
 - capacity,
 - skills, and
 - capabilities.
- Enlist suppliers and partners to supplement needed skills and capabilities.
- Monitor and manage capabilities and skills with an eye on critical resources and supplier capacity.



The Create and manage resource plan Subprocess

Define and manage skills taxonomy

Create resource plan

Match resource demand with capacity, skills, and capabilities

Collaborate with suppliers and partners to supplement skills and capabilities

Identify critical resources and supplier capacity

Monitor and manage resource capacity and availability

- Analyzing the **skills** needed to perform services to be delivered.
- Classify and **organize** these skills requirements.

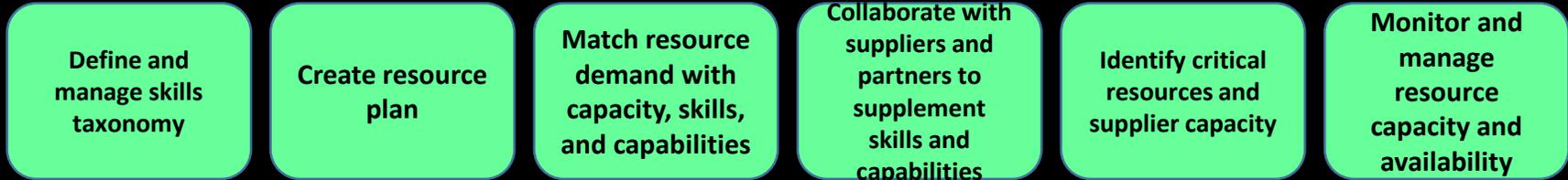


The Deliver Services Process Group



Quiz subject

The Create and manage resource plan Subprocess



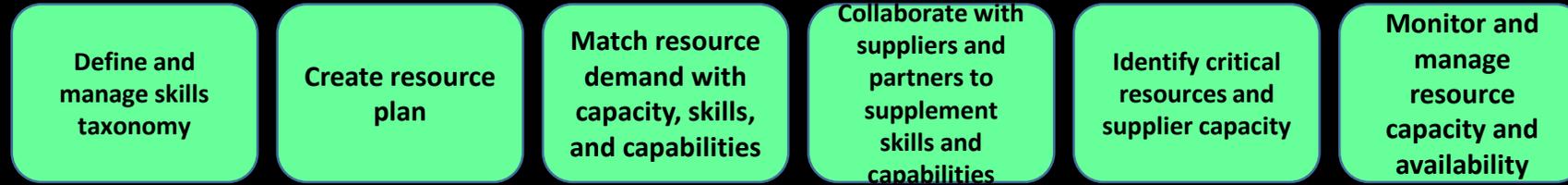
- Creating a **plan** to ensure that all resources are available to carry out services required for the customer.
- This can include physical resources and personnel.

Excel based Resource Plan Template

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Resource Name	Team	Project	Task	16-Feb	23-Feb	2-Mar	9-Mar	16-Mar	23-Mar	30-Mar	6-Apr	13-Apr	20-Apr	27-Apr	4-May	11-May	18-May	25-May	1-Jun	8-Jun
2	Resource A	Team A																			
3			Project A	Task 1	5	5	5														
4			Project A	Task 2				5	5	5											
5			Project A	Task 3							5	5	5		3	3	5	5			
6			Project B	Task 4											2	2			2	3	
7	Resource B	Team A																			
8			Project B	Task 5	5	5	5	5	5	5											
9			Project B	Task 6								5	5	5	5	5					
10			Project B	Task 7														5	5	5	5
11	Resource C	Team B																			
12			Project B	Task 8	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
13																					



The Create and manage resource plan Subprocess



- **Matching** demand with skills and capability.
- **Enlisting** suppliers and partners to help with demand when needed.



The Create and manage resource plan Subprocess

Define and manage skills taxonomy

Create resource plan

Match resource demand with capacity, skills, and capabilities

Collaborate with suppliers and partners to supplement skills and capabilities

Identify critical resources and supplier capacity

Monitor and manage resource capacity and availability



- Understanding organizational need to enlist suppliers to provide resources for **gaps** in skills and capabilities.
- Identify where additional skills are needed and collaborate with third parties to **fill** those demands.



The Create and manage resource plan Subprocess

Define and manage skills taxonomy

Create resource plan

Match resource demand with capacity, skills, and capabilities

Collaborate with suppliers and partners to supplement skills and capabilities

Identify critical resources and supplier capacity

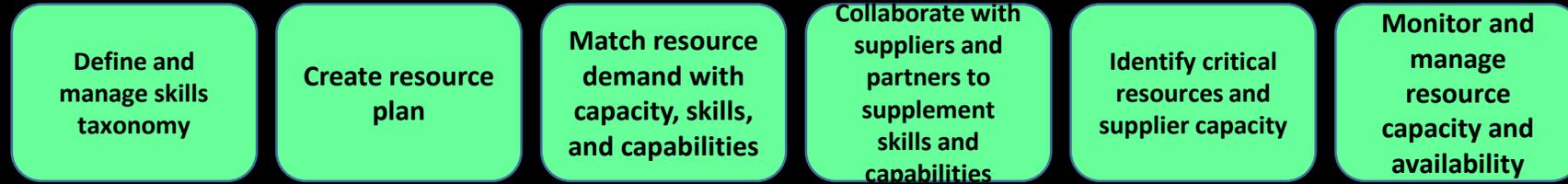
Monitor and manage resource capacity and availability



- Realizing **critical** resources required to perform and carry out customer needs.
- **Engage** with suppliers to fulfill those needs, if necessary.
- Identify supplier **threshold** for performing those needs.



The Create and manage resource plan Subprocess



- Directing and managing **workforce** needs.
- Ensure that resources are at **full** capacity.
- Monitor that all resources are able to and **skilled** in their respective rolls.
- Make sure that necessary resources are **available** to provide the needed services.



The Manage service delivery resources Process

- Subprocesses:
 - Manage service delivery resource demand
 - Create and manage resource plan
 - **Enable service delivery resources**



The **Enable service delivery resources** Subprocess

- Instituting **training** to enable resources to provide service delivery to the customer.
- Develop a training **plan**.
- Create **materials** that provide for operation and technical training.
- **Schedule, perform, and evaluate** training.



The Enable service delivery resources Subprocess

Develop service delivery training plan

Develop training materials

Manage training schedule

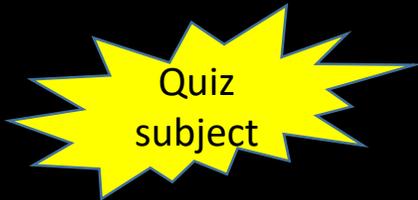
Deliver operations training

Deliver technical training

Perform skill and capability testing

Evaluate training effectiveness

- Creating a detailed summary of all the actions relevant to **teaching** a person a particular skill or type of behavior.
- Determine who will **deliver** the training.
- Determine when and where the apprentice or trainee needs to go to **receive** the structured component of the training.



The **Enable service delivery resources** Subprocess

Develop service delivery training plan

Develop training materials

Manage training schedule

Deliver operations training

Deliver technical training

Perform skill and capability testing

Evaluate training effectiveness

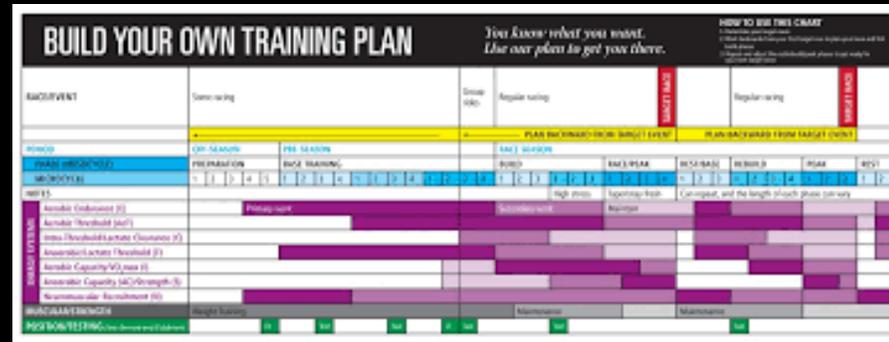
- Developing **materials** necessary to provide comprehensive training for the skills or behavior needed to deliver services.
- This can be any number for **formats** such as classroom or computer based training.



The Enable service delivery resources Subprocess



- Providing training to the employee
- within a manageable **timeframe**
- to meet the needs of both the individual and the organization.



The **Enable service delivery resources** Subprocess



- **Educating** service delivery personnel
- on all aspects of the operations process of the organization.



The **Enable service delivery resources** Subprocess

Develop service
delivery training
plan

Develop
training
materials

Manage
training
schedule

Deliver
operations
training

Deliver technical
training

Perform skill
and capability
testing

Evaluate
training
effectiveness



- Ensuring that **all** personnel are trained on **all** technical aspects of service delivery.

The **Deliver Services** Process Group



The **Enable service delivery resources** Subprocess

Develop service delivery training plan

Develop training materials

Manage training schedule

Deliver operations training

Deliver technical training

Perform skill and capability testing

Evaluate training effectiveness

The **Deliver Services** Process Group

- Verifying that training provided to the person was **successful** through
 - the administration testing and
 - the application of skills for practical use.



The Enable service delivery resources Subprocess



- Eliciting feedback from various sources
- to evaluate the training provided.
- This can be achieved through testing and the practical application of skills.

Additionally, manager or student feedback can be garnered to evaluate training effectiveness.



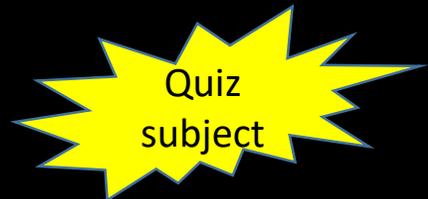
The Deliver Services Process Group



The Deliver service to customer Process

- Rendering service to the customer by
 - initiating,
 - executing, and
 - completing tasks
 - associated with service delivery.

The Deliver Services Process Group



The Deliver service to customer Process

- Subprocesses:
 - Initiate service delivery
 - Execute service delivery
 - Complete service delivery

The Deliver Services Process Group



The Deliver service to customer Process

- Subprocesses:
 - Initiate service delivery
 - Execute service delivery
 - Complete service delivery

The Deliver Services Process Group



The **Initiate service delivery** Subprocess

- Collaborating with the customer to **understand** service needs.
- Review, understand, and modify the delivery **scope** with the organization needs of the customer in mind.
- Confirm **readiness** and identify, select, and assign **resources**.
- **Plan** for service delivery.



The **Initiate service delivery** Subprocess

Review contract and agreed terms

Understand customer requirements and define refine approach

Modify/revise and approve project plan

Review customer business objectives

Confirm environmental readiness

Identify, select, and assign resources

Plan for service delivery

- Meeting with the customer, partner, and/or supplier
- to review the **terms** of the solutions contract and
- **agree** on the terms set forth.



The **Initiate service delivery** Subprocess

Review contract and agreed terms

Understand customer requirements and define refine approach

Modify/revise and approve project plan

Review customer business objectives

Confirm environmental readiness

Identify, select, and assign resources

Plan for service delivery

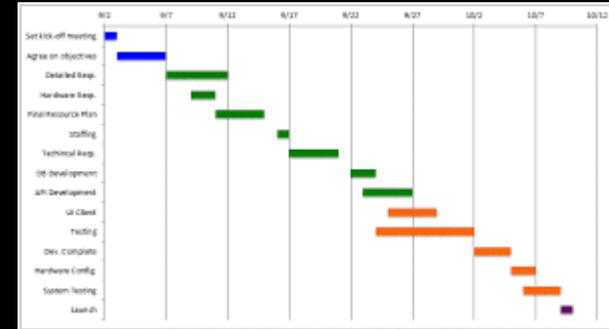
- Taking the customer **requirements** for a solution and
- **applying** those requirements to a refined approach for service.



The **Initiate service delivery** Subprocess



- **Updating** the project plan to align with the new solution approach agreed upon with the customer.



The **Initiate service delivery** Subprocess

Review contract and agreed terms

Understand customer requirements and define refine approach

Modify/revise and approve project plan

Review customer business objectives

Confirm environmental readiness

Identify, select, and assign resources

Plan for service delivery

- Aligning the customer business **objectives** with the agreed service delivery **solution**.



The **Initiate service delivery** Subprocess

Review contract and agreed terms

Understand customer requirements and define refine approach

Modify/revise and approve project plan

Review customer business objectives

Confirm environmental readiness

Identify, select, and assign resources

Plan for service delivery



- Confirming that the organization has the **resources** necessary to meet the expectations for the solution for service delivery.



The **Initiate service delivery** Subprocess



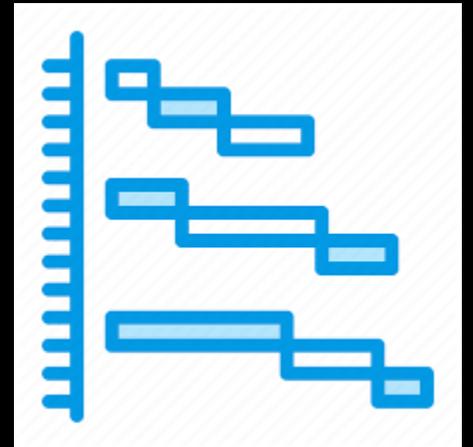
- Identifying, selecting, and assigning **resources** required to deliver service to the customer. Ensure that all objectives are established and met, and the all rules of engagement have been identified and communicated.
- Providing the **workforce** with a plan of action and **goals** necessary to provide a service. Make sure that those objectives are met.
- Establishing guidelines for how resources **engage** with the customer. For example, set rules of accountability, interaction, and accommodation when engaging the customer. Resources should be polite, empathetic, and attentive.



The **Initiate service delivery** Subprocess



- Establishing a **plan** of action to successfully render a solution for service delivery.



The Deliver service to customer Process

- Subprocesses:
 - Initiate service delivery
 - **Execute service delivery**
 - Complete service delivery

The Deliver Services Process Group



The **Execute service delivery** Subprocess

- Carrying out service delivery to the customer by **creating** and **deploying** the necessary solution.
- Analyze need and create a **solution**.
- **Validate** the solution and make changes if needed.
- Obtain **approval** to build/buy solution and then deploy solution to customer.



The **Execute service delivery** Subprocess

Analyze environment and customer needs

Define solution

Validate solution

Identify changes

Obtain approval to proceed

Make build/buy solution

Deploy solution

- Understanding the needs of the customer and providing the necessary **resources** to meet those requirements within the scope of the organization.



The **Execute service delivery** Subprocess

Analyze environment and customer needs

Define solution

Validate solution

Identify changes

Obtain approval to proceed

Make build/buy solution

Deploy solution

- Creating a **plan** of action to provide service delivery to the customer through a possible solution.
- This solution should be in response to a **collaborative** effort made by the organization and the customer to meet service delivery needs.



The **Execute service delivery** Subprocess



- Validating that the proposed solution is **feasible** and **provides** the needed services for the customer.



The **Execute service delivery** Subprocess



- Realizing **issues** within the original drafted solution and
- providing **changes** to correct those issues.



The **Execute service delivery** Subprocess



- Gaining approval from all avenues
- to **proceed** with providing solutions for service delivery.



The **Execute service delivery** Subprocess

Analyze environment and customer needs

Define solution

Validate solution

Identify changes

Obtain approval to proceed

Make build/buy solution

Deploy solution



- **Constructing or purchasing** solutions necessary to provide service delivery.



The **Execute service delivery** Subprocess



- **Providing** the customer with promised services and solutions.



The Deliver service to customer Process

- Subprocesses:
 - Initiate service delivery
 - Execute service delivery
 - Complete service delivery

The Deliver Services Process Group



The Complete service delivery Subprocess

- Implementing **final** steps to complete service delivery to the customer.
- Evaluate success through project **review**, complete **finance** activities, and **confirm** delivery.
- **Release** resources and manage completion by **harvesting** knowledge and systems by archiving **records**.



The Complete service delivery Subprocess

Conduct service delivery/project review and evaluate success

Complete/finalize financial management activities

Confirm delivery according to contract terms

Release resources

Manage service delivery completion

Harvest knowledge

Archive records and update systems

- **Reviewing** the entire service delivery process
- to evaluate the **success** of the project from beginning to end.



The Deliver Services Process Group



Quiz subject

The Complete service delivery Subprocess



- Insuring all **payments** are received and all activates therein are completed.



The Complete service delivery Subprocess



- Confirming that the organization has **satisfied all terms** of the delivery contract set forth in collaboration between the organization and customer.



The Complete service delivery Subprocess



- **Discharging** leveraged resources from service delivery commitments upon completion.
- Returning resources to the resource pool.



The Complete service delivery Subprocess



- Ensuring that all aspects of the service delivery process are **completed** both internally and externally.



The Complete service delivery Subprocess



- Garnering feedback from all avenues to collect a **knowledge** base concerning services rendered.



The Complete service delivery Subprocess



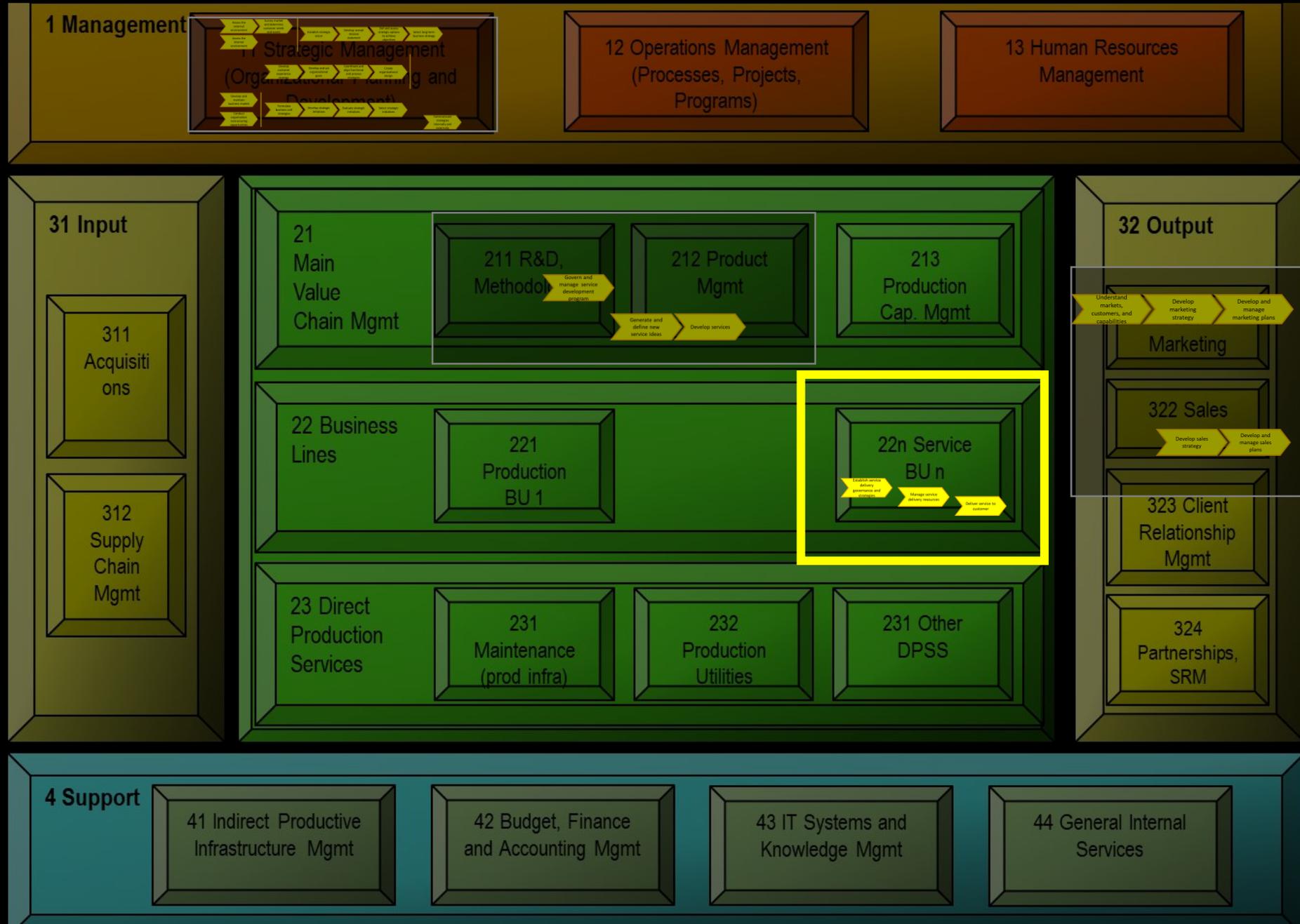
- Completing and archiving all **records** associated with requested services. Update all necessary systems to reflect those changes.



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