

Aligning Your CMDB to the CSDM Framework to Support Your Portfolio of IT Services

September 2024

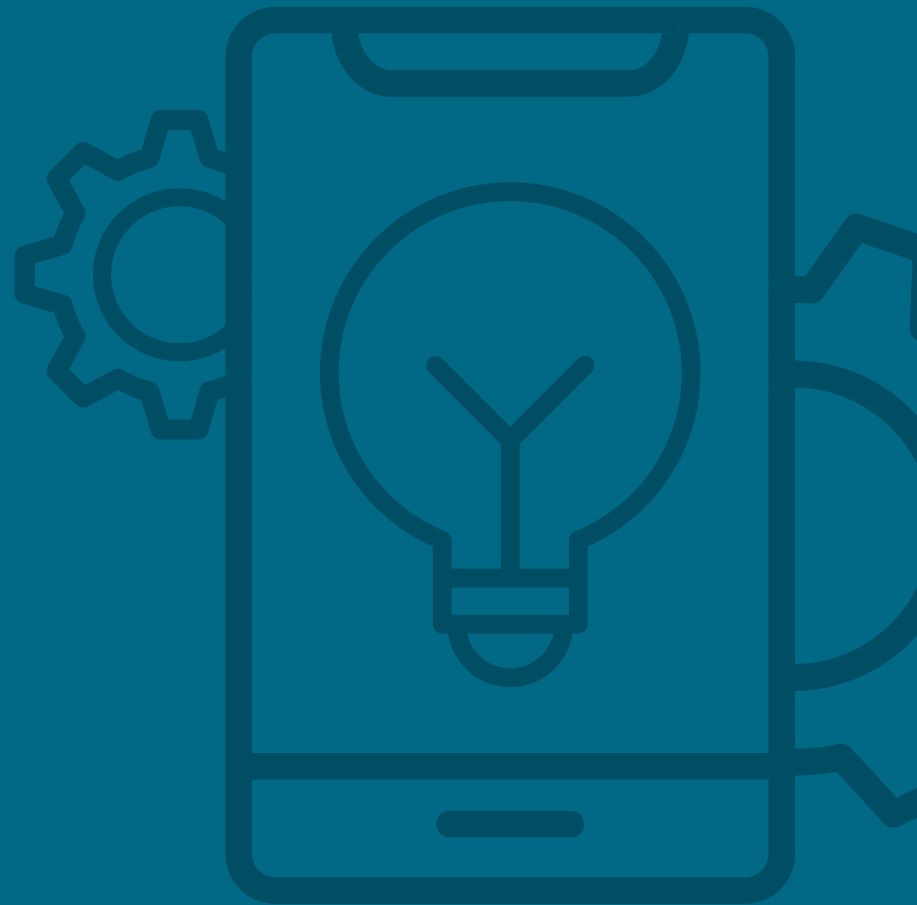


Agenda

- Intro to Cask
- Introduction to the CMDB Common Services Data Model - What is it and why does it matter?
- USC Case Study: Identifying, defining & presenting high value services
- Managing your IT Services & tracking your overall quality of Service Delivery
- Governing your Services lifecycle from design to retire



Introduction to Cask



Introductions



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Crafting exceptional experiences to make the difficult easy for clients

13+

Years ServiceNow Partner

11

Product Line Achievements

900+

Certifications & Accreditations

4.62
CSAT

Leading ServiceNow Partner

150+

Apps Built on ServiceNow

6

Offerings Built with ServiceNow



Inc.
5000

Best Workplaces



Cask is the only pure play
ServiceNow partner with
dedicated, fully certified
practices across the
platform.



IT SERVICE
MANAGEMENT



IT OPERATIONS
MANAGEMENT



IT ASSET
MANAGEMENT



STRATEGIC
PORTFOLIO
MANAGEMENT



EMPLOYEE
WORKFLOW



CUSTOMER
WORKFLOW



SECURITY
& RISK



APP ENGINE

STRATEGY

Strategic Roadmapping
Advisory Consulting
Platform Strategy & Governance
Demand Management

TRANSFORMATION

App Modernization
UX & UI Design
Product Management
Org Change Management
Testing & Quality Engineering
Program & Project Management
Agile Transformation w/SAFe

IMPLEMENTATION & APP DEVELOPMENT

Product Implementation
Platform Engineering
Data Management & Integrations
App Development

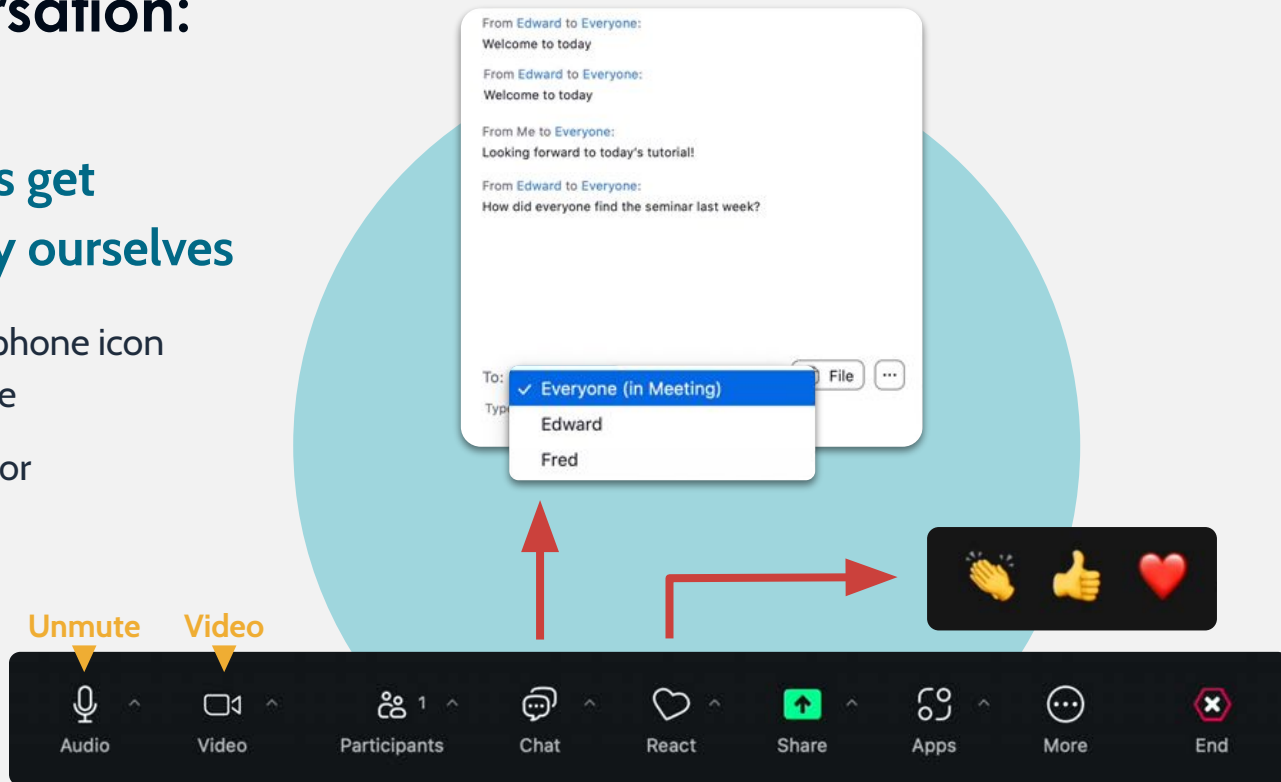
OPERATIONS & ENHANCEMENT

Continuous Cloud Innovation
Platform Architecture & Engineering
Functional Process Execution
Cask Reserve

Join the Conversation: Using Zoom

Turn on Video – Let's get interactive and enjoy ourselves

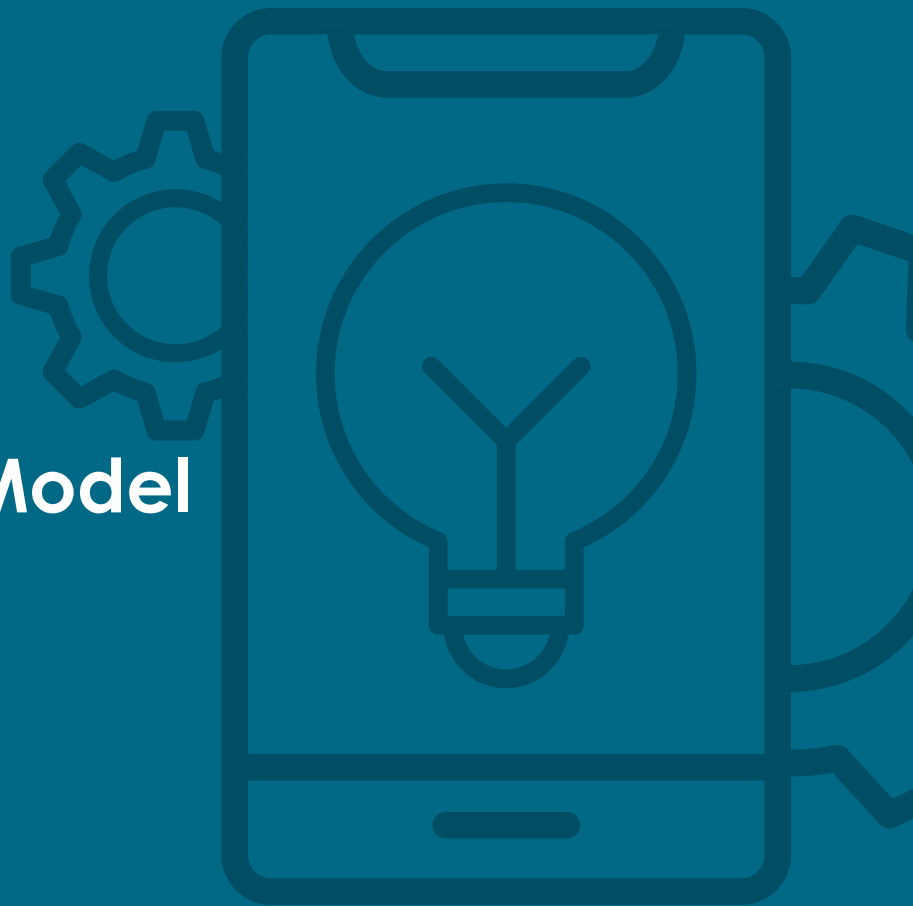
- **Unmute:** Click the microphone icon to unmute and participate
- **Chat:** Message everyone or just one person
- **Get Help:** Use Chat





What is it and why does it matter?

Introduction to the CMDB Common Services Data Model (CSDM)



What is the Common Service Data Model (CSDM)



CSDM high level use cases

Design



- Understand CIs related to an application and business capabilities to identify redundancies, monitor costs and make better investment decisions around roadmap
- Support investment decisions by identifying all end of life software for a business application
- Identify the number of at-risk applications supporting critical services [which need to undergo application assessment] •
- Determine where to design security controls for applications and technology sharing sensitive data (PII, PCI DSS, HIPAA)

Consume



- Understand services, ownership, cost, scope of what is offered and request access to the services
- Report on aggregated Service performance for a Service Portfolio
- View the Service dependencies on underlying technology and technology services
- Be aware of upcoming impacts and changes on supporting technology

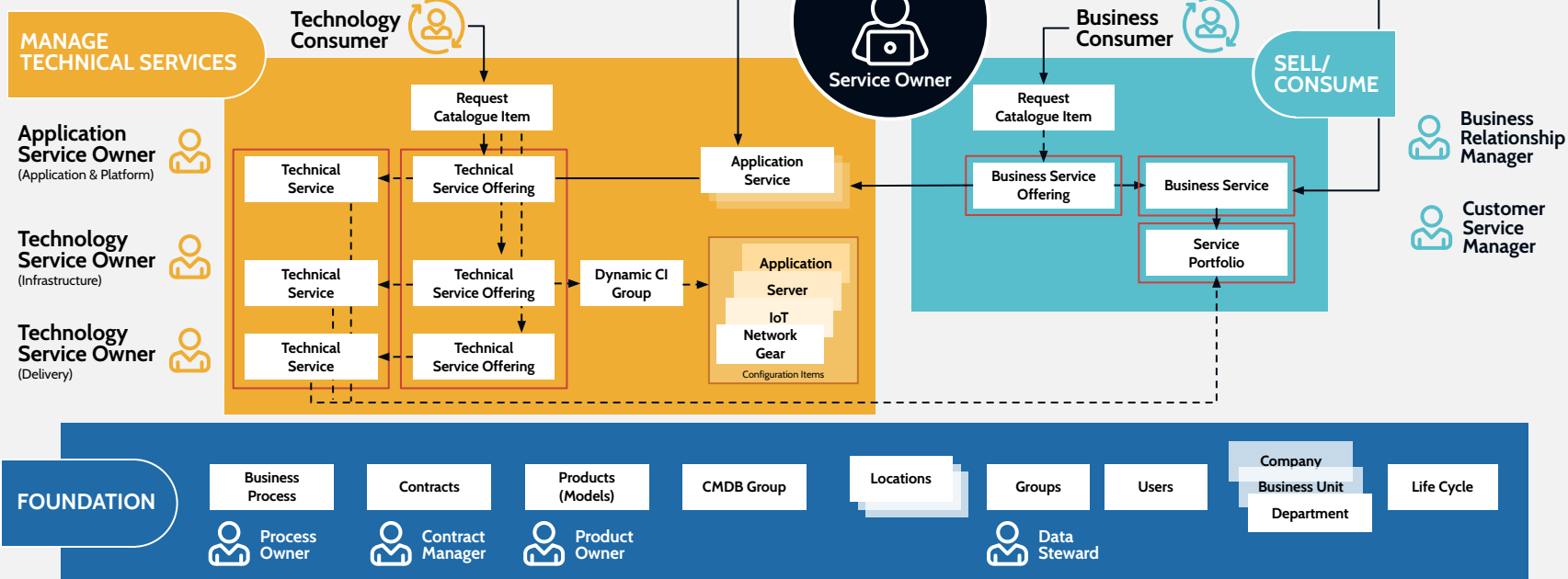
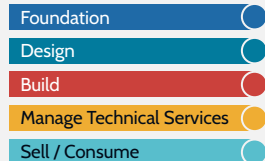
Manage



- Understand services, service offerings, service support and all relationships to underlying CIs
- Determine the impact of an incident or change, the causal CIs, who the consumers are
- Manage service commitments, and monitor/report the availability of a technical service
- Roll up alerts for technology components to have insight into events for critical Technical Services (including security vulnerabilities)
- Understand the costs to run technical services

Common Service Data Model 4.0

Domain



What is Service Portfolio Management?

- The ability to define multiple IT Service portfolios, each with its own unique taxonomy structure
- The ability to associate Services and Service Offerings with specific portfolios
- Expanded service and service offering data

Service Portfolio

IT Service Portfolio

Taxonomy Nodes

Applications

Hardware

Information Security

Network

Service (Business or Technical)

Email & Chat

Telecommunications & Cabling

Network Services

Offering

Email List Management

Cabling & Fiber Management

VPN

Wifi

What is the Value?

1

Understand Services, their makeup and accountabilities



**Better
visibility**

2

Identify insights from operational activities related to Services



**Increased
efficiency**

3

Prioritize critical events based on service-related information



**Higher
productivity**

4

Understand Service Health (Availability, CSAT, Performance, Vulnerabilities, IPC stats)



**Informed
decision making**

What are some common challenges?

1 Not knowing where to start

2 The org may need to do this, but are often not staffed with skill set to complete service definition

3 Services don't roll up perfectly to how most organizations are aligned (cost centers, functions, or departments typically)

4 Many people may not understand the difference between service portfolio and service catalog

5 There may not be a clear path within their organization to 'insert' a service portfolio

6 There may not be a methodology or have conflicting frameworks

7 May not be able to justify the importance of the service portfolio

8 Analysis paralysis

Now let's discuss the USC ITS Journey for Defining your Services and Service Offerings



CASE STUDY

USC Service Portfolio Journey



Identifying, defining & presenting high value services



USC is a constellation of schools, centers and institutes located in southern California where some of the brightest minds are leading the way to the future of education.

We wanted to logically organize enterprise services offered by our central IT organization, Information Technology Services (ITS), so we are able to:

- Clearly share the services we offer with our customers.
- Assess the overall quality of service delivery.
- Identify the most pertinent areas for improvement.
- Govern Service Lifecycles to include a pipeline of new offerings and retire low value services to focus in high value services.

Defining Services for your users



Key Productivity Indicators and Critical Success Factors of Service Delivery

Better understanding of dependencies between offerings across the organization

Service Portal

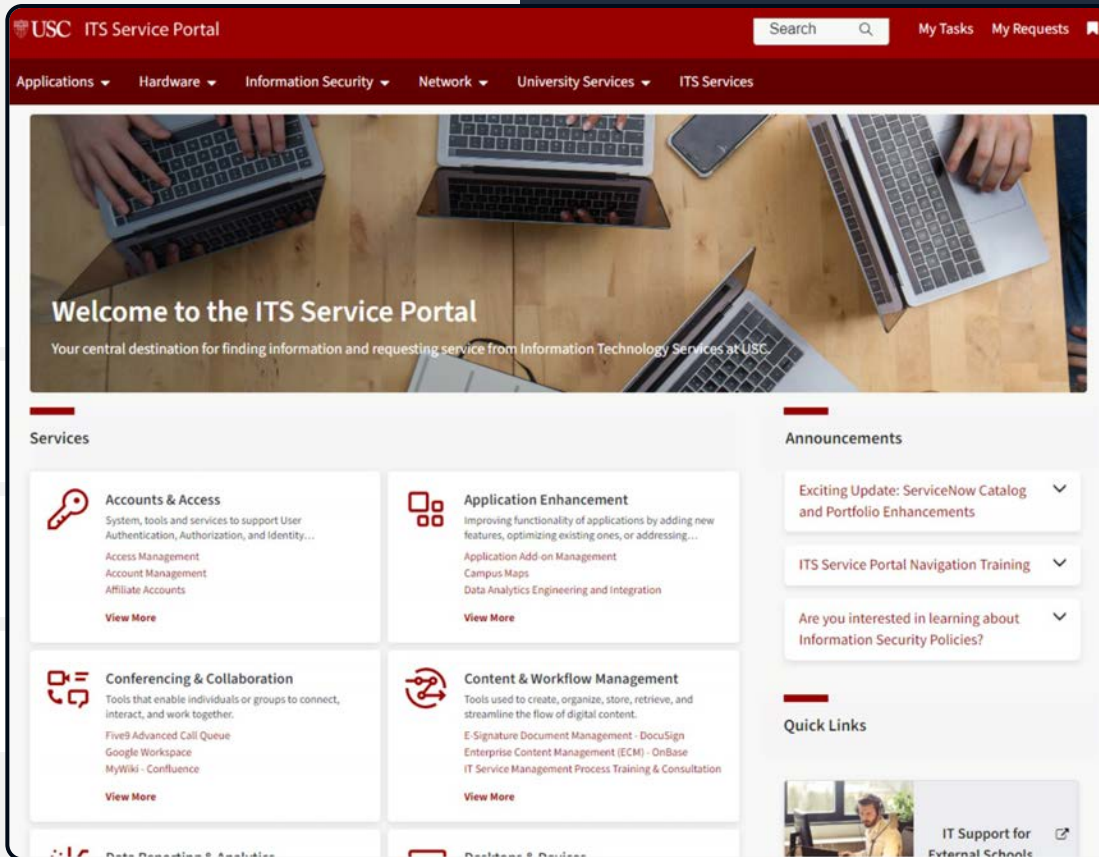
Understand ► Order ► Fulfill

► Centralize service and ordering information in one portal.

► Services named and conveyed from the customer point of view.

► Easily identify and select the services you need.

► Create multiple paths for different types of users.



Service Offering

Manage ► Monitor ► Maintain

- Offerings linked to Service Catalog for customers to request and ITS to fulfill.
- Share the information customers want to know.
- Empower service owners to maintain service information.
- Audit annually.

Reporting and Analytics

Business Intelligence and Analytics Enhanced Tools and Insights for ITS Technology Partners

Description:

ITS business intelligence and analytics services simplify complex data, helping customers understand trends and patterns through clear reports, dashboards and visualizations. These offerings include:

- Enhancements to existing reporting and leverage analytical tools to derive Predictive and Prescriptive outcomes.
- Consultation and discovery services to enable extraction of actionable insights and informed recommendations from the data, supporting effective IT decision-making.

Intended Customers:

This service targets and supports internal ITS customers, Faculty, Staff, and campus partners (FAO, Registrar, Admissions, etc.).

Related Policies:

- Vulnerability and Patch Management Policy
- Access Management Policy
- Change and Release Management Policy
- Data Protection Policy
- Patch Management Standard

Browse Resources

Order by

Business Intelligence (BI) Inquiry

Submit a BI inquiry for requests not covered under a more specific service category.

Data/Report Request Intake

Request for data or report that is currently unavailable. Approval and appropriate security...

Managed Business Intelligence (BI) Report

Request managed BI reports, which includes any pre-defined reports.

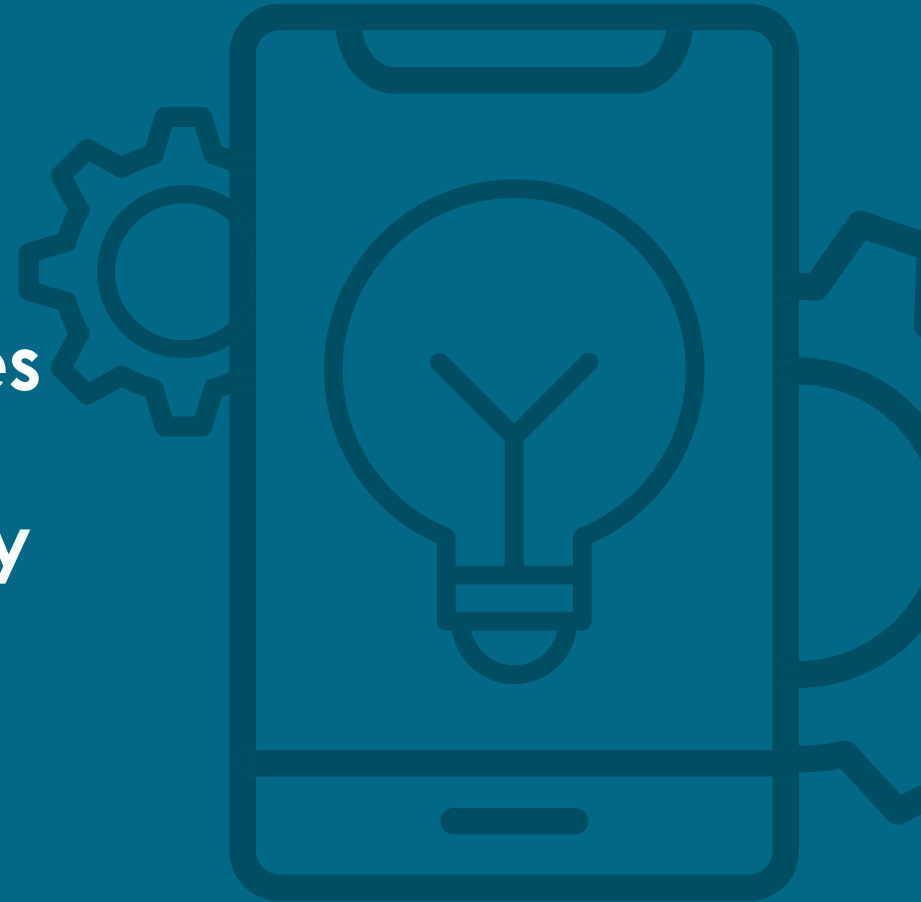
Secure FTP Integration Number

Use this form to request an integration number to receive scheduled secure FTP.



SERVICE PORTFOLIO MANAGEMENT

Managing your IT Services & tracking your overall quality of Service Delivery



Service Portfolio Management

► Why use Service Portfolio Management?

- Develop a pipeline of services and service improvements that aligns with business goals
- Prevent service duplication overlap and conflicts
- Ensure service definition compliance, consistency, and accuracy
- Enable planning, validation, and release of new and improved services
- Publish Offerings for consumption
- Generate service performance reports and dashboards
- Expose vendor contributions and impact on service performance
- Identify and retire low-value services so resources can be redeployed



Key Concepts

Service Portfolio

Used to manage like-items together for the business. These may be grouped by objective, capabilities, organization, or geography (e.g., ERP, Financial management, Technology and even different IT portfolios by IT organization)

Taxonomy Tiers/Nodes

Taxonomy nodes represent all the available organizational branches for the Portfolio

CSDM

A ServiceNow framework for CMDB data modeling using out of the box CMDB core tables for service modeling through recommended mappings based on specific domain areas: Design, Management, Sell/Consume.

Business Service

A service type that is published to business users, and it typically underpins one or more business capabilities.

Technical Service

A service type, technical in nature, that is published to service owners and typically underpins one or more business or application services.

Application Service

Logical representation of a deployed application stack. These are REAL CI's in your CMDB created if using Service Mapping Discovery or created manually and related to your hosting infrastructure

Service Offering

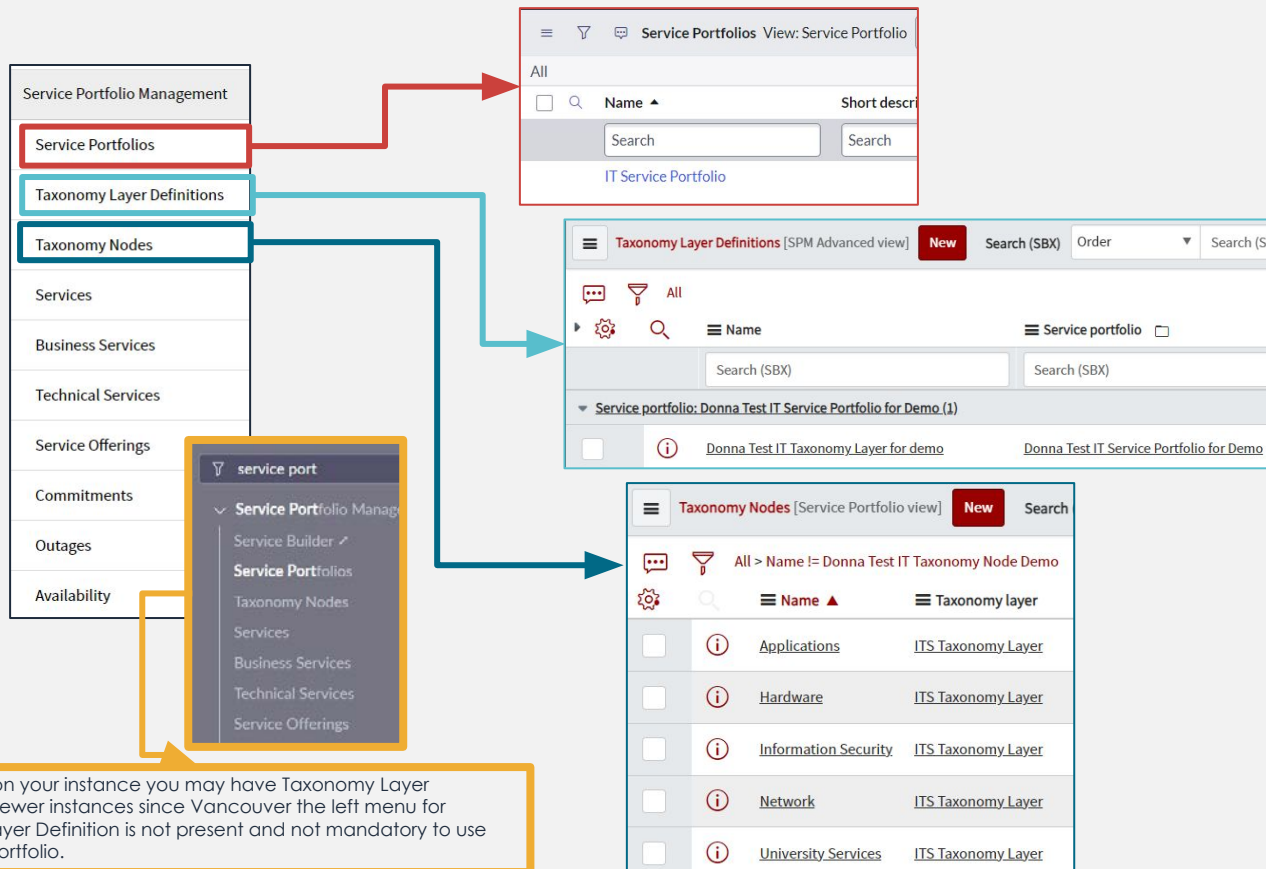
The way in which goods and services are packaged to meet a specified commitment to a consumer or a level of services offered.

Business Application

Logical representation of software and infrastructure that provides business functionality and/or generating revenue. While included in CSDM, these align to APM Portfolio and are not used as CI's.

Navigating the Service Portfolio in ServiceNow

- These are the Service Portfolio Tables used solely to group & organize the Services under a Parent Portfolio
 - Service Portfolio
 - Taxonomy Layer*
 - Taxonomy Nodes
- Most reporting and Service Dashboards are done at the Service Portfolio Level or the Service or Offering Level, not Taxonomy Node or Layer



Business Services and/or Technical Services

ServiceNow Business Services View

Business Services View: Service Portfolio

Number Search

Actions on selected rows... Create service in service builder New

All > State = (empty) .or. State = Published

Name	Service portfolio	Taxonomy node	State	Phase	Status	Number	Business criticality
Business Service 123	IT Service Portfolio	IT Taxonomy Node 1	Published	Catalog	Operational	BSN0001001	2 - somewhat critical
Donna's Test Service 123	IT Service Portfolio	IT Taxonomy Node 1	Published	Catalog	Operational	BSN0001003	2 - somewhat critical
Donna Retired Service	IT Service Portfolio	IT Taxonomy Node 1	Retired	Retired	Retired	BSN0001014	2 - somewhat critical

Catalog and Incident use only Active Services and Offerings based on Phase and Status

1. Active = Phase = Catalog and Service Status = Operational
2. Retired makes a Service and its child offerings inactive
3. State and Published are used only if you are using Service Builder plugin & workflow to create and manage Services and Offerings

- The Business services and/or Technical services are the parent services for the service offerings
- All services get a unique BSN number when created
- Personalize your Business Services List and add Number, Name, Phase, Status (service status), Service Classification, Support Group, Owned by, Taxonomy Node and Service Portfolio
- Service Class is key > IT Business Services offered to end users, IT Services offered to other IT Service Owners may be Technical Services
- It is important to assign a Business Service Owner (user) and Support Groups and/or Managed by Groups at the service level.



Creating / Managing Services & Offerings



Defining Offerings



NAME & DESCRIBE

The CI name and a high level and detailed description of the service/product being offered.



SUPPORT & CHANGE WINDOWS

Clarifying the support models, escalation models and where a particular offering might have differences. Also, when changes are made.



POLICIES

If policy driven, link to the related policies.



CUSTOMERS

Clarifies entitlements; who can have the service.



TRAINING

Options for training and shared knowledge are made available and accessible.



COSTING AND FUNDING

Is there a cost, what is it and which budget does it come from.



OWNERSHIP & RACI

Names the service owner, business owner & technical owner. This helps with accountability and escalation.



RELATED SERVICES

Identify the services or processes required to get a service, for example, Single Sign On, security architecture approval, etc.



PRODUCT LIFECYCLE

Is this a pilot and will this service be invested in to ensure maturation, support and sustainability?



BUSINESS OBJECTIVES

What problem are we solving with this service/product? What is it achieving for the business?



SERVICE CATALOG

Catalog items to request the service and related services and target turnaround times to deliver or respond to issues.

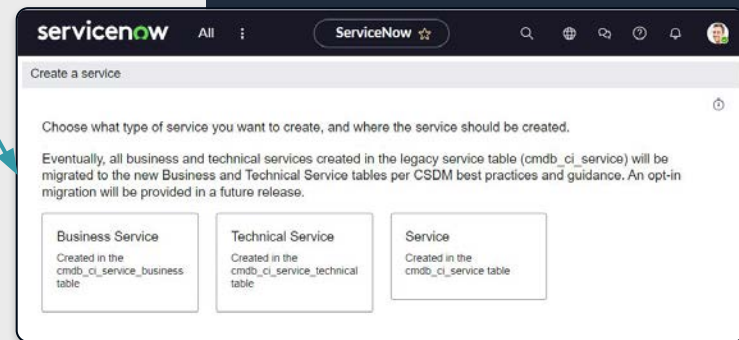
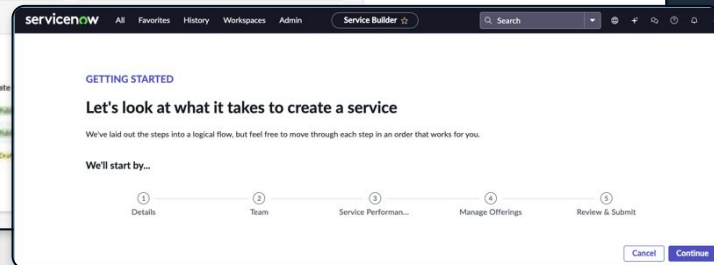
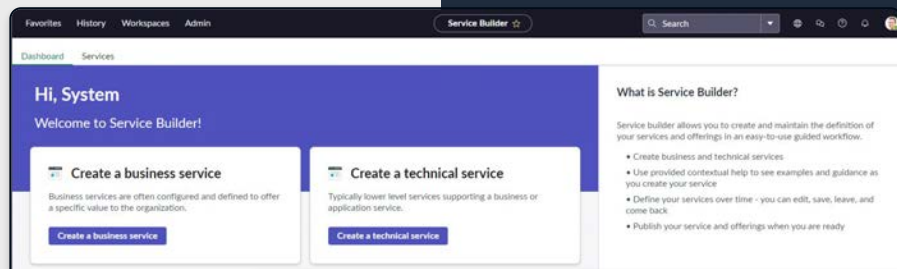
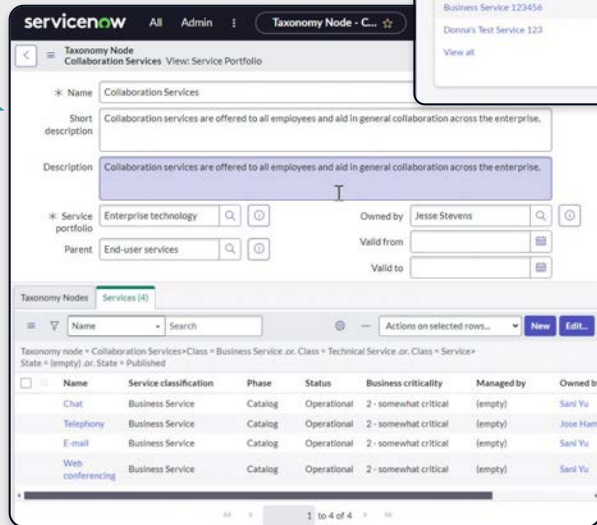
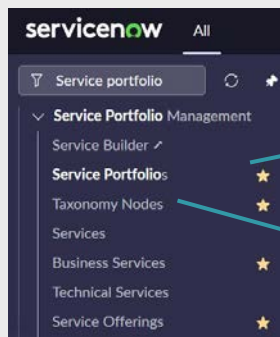


CONTRACTS

What are the contract details? Is there an MSA, when and what is needed for renewals, etc.

Services CI Data Management

- Create and Manage Services data using Service Builder or
- Basic Views from Service Portfolio Taxonomy Node



Service Offerings - Data Management

Offerings are the most critical service record as these are used with ITSM Processes such as Service Catalog. Offerings may also be used with Incident, Problem and Change Management

1. Name the Offering from the point of view of your service consumers and manage the Offerings lifecycle using phase and status
2. Identify Consumer types
3. Identify Team for Delivery and Support group for assignment rules and catalog workflows
4. Set offering price and unit descriptions if costs are associated with delivery.
5. Operations to identify contracts and any delivery service levels agreements (SLAs)

The screenshot displays the ServiceNow 'Offering' configuration page for 'Executive web conferencing'. The interface is divided into several sections, with numbered callouts indicating key configuration areas:

- Callout 1:** Points to the 'Name' field, which is set to 'Executive web conferencing'. Other fields in this section include 'Parent' (Web conferencing), 'Phase' (Catalog), 'Status' (Operational), 'Owned by' (Jose Hamilton), 'Delivery manager' (Abraham Lincoln), 'Technical contact', and 'State' (None).
- Callout 2:** Points to the 'General' tab, which contains fields for 'Number' (BSN9001066), 'Aliases' (Zoom), 'Business criticality' (2 - somewhat critical), 'Consumer type' (Internal), and 'Service classification' (Business Service).
- Callout 3:** Points to the 'Team' tab, which lists roles and their assigned personnel: 'Delivery manager' (Abraham Lincoln), 'Delegate' (Abel Tuter), 'Business contact' (Fred Luddy), and 'Support group' (Application Development).
- Callout 4:** Points to the 'Price' tab, which shows the 'Price model' (Per Unit), 'Price unit' (Single User Subscription), 'Price' (\$ 100.00), and 'Unit description' (Single User Annual Subscription License).
- Callout 5:** Points to the 'Operations' tab, which includes fields for 'Contract' (0000000), 'Maintenance schedule' (Weekends), 'Service level requirement' (Must be available 24x7x365), 'Prerequisites', 'Enterprise Agreement', 'Compatibility dependencies', and 'Monitoring requirements' (24x7x365).

Offerings - Service Delivery

1. Offering Service Commitments and Service Availability
2. Service Catalog “Items orderable by subscribers” that allow this offering to be requested by consumers.
3. Other Offerings this Offering depends on

1

Related Links
[Calculate Past Availability](#)
[Subscribe](#)

Service Commitments (1) Teams (1) Service Offerings I Depend On (1) Service Offerings Dependent On Me Other tasks Knowledge Articles Subscribed by Group

Subscribed by Location Subscribed by Department Subscribed by User Subscribed by Company SLA Results Service Availability (7)

Items orderable by subscribers (2) Outages All Changes All Incidents All Problems

≡ ▾ Order Search ⚙️ — Actions on selected rows... New Edit...

Service offering = Executive web conferencing

☐ 🔍 Service commitment Order ▲

99.9% 24x7 110

2

Service Commitments (1) Teams (1) Service Offerings I Depend On (1)

Subscribed by Location Subscribed by Department Subscribed by User

Items orderable by subscribers (2) Outages All Changes All Incidents

≡ ▾ for text Search

Service Offering = Executive web conferencing

☐ 🔍 Catalog Item

[Request zoom webinar](#)

[Web Conferencing](#)

3

Service Commitments (1) Teams (1) Service Offerings I Depend On (1) Service Offerings Dependent On Me

Subscribed by Location Subscribed by Department Subscribed by User Subscribed by Company

Items orderable by subscribers (2) Outages All Changes All Incidents All Problems

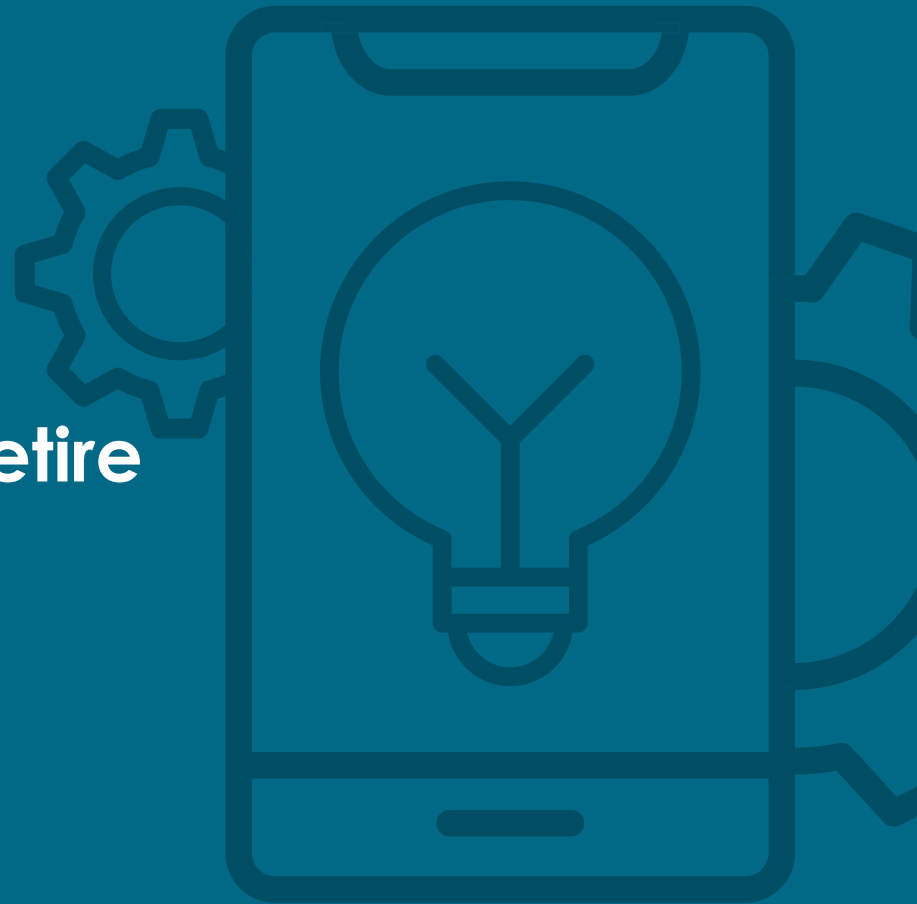
≡ ▾ Created Search

CI Relationships

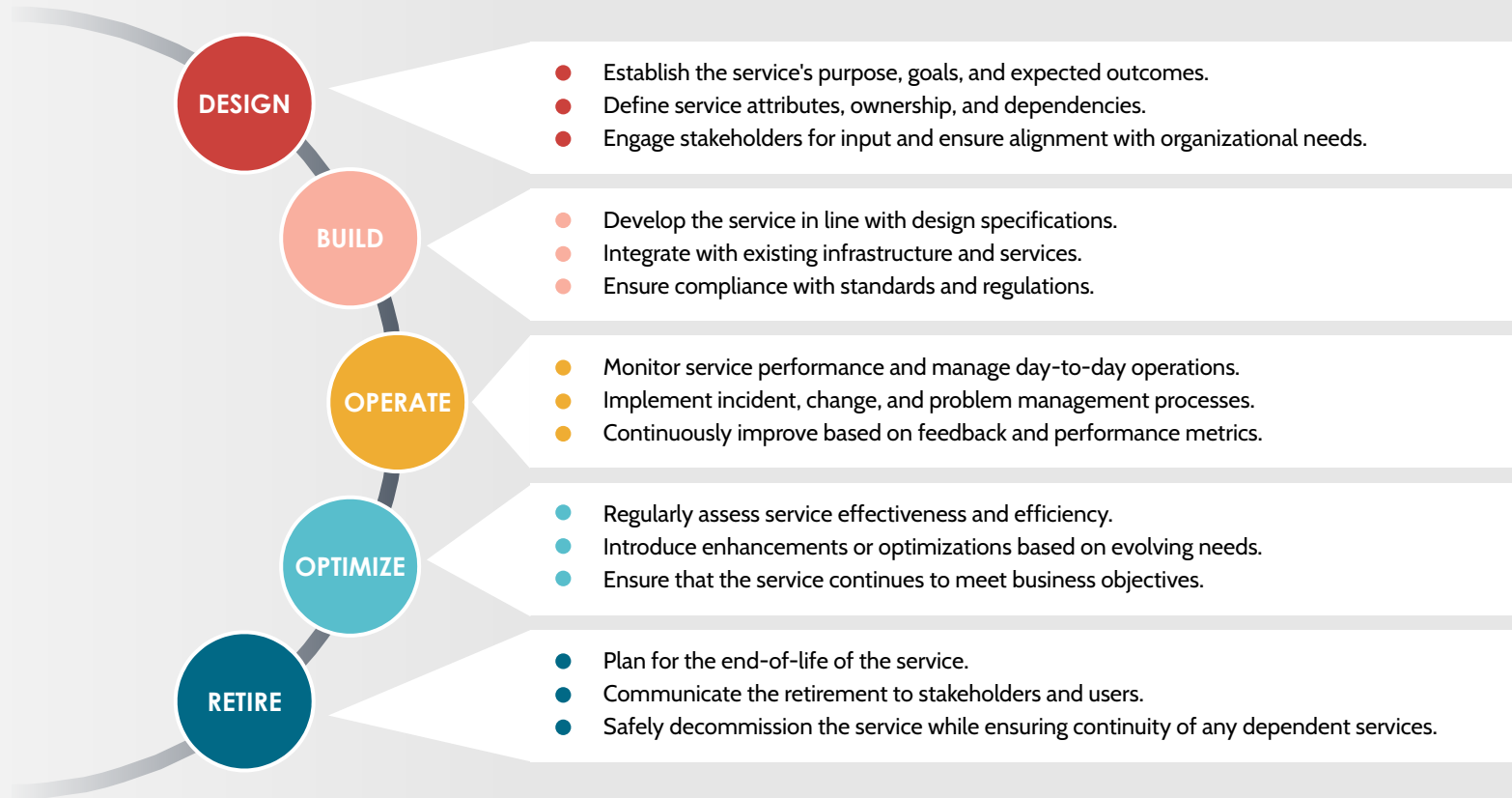
<input type="checkbox"/> 🔍	Parent	Type	Child
	Executive web conferencing	Depends on::Used by	Zoom meeting



Governing your Services lifecycle from design to retire



Services Lifecycle



Governing your Services

Governance Framework:

- ▶ **Service Ownership:** Assign clear roles and responsibilities for each phase of the lifecycle.
- ▶ **Policies and Compliance:** Implement policies to ensure consistency, compliance, and risk management across the lifecycle.
- ▶ **Review and Audit:** Regularly review service performance and governance practices to identify areas for improvement.

Tools and Metrics for Effective Governance:

- ▶ **Service Portfolio Management (SPM):** Use SPM tools to track services across their lifecycle, ensuring alignment with strategic goals.
- ▶ **Key Performance Indicators (KPIs):** Establish KPIs to monitor service health, user satisfaction, and financial performance.
- ▶ **Automated Workflows:** Leverage automation to streamline governance processes and ensure consistent application of policies.

Questions?





Summary



Getting Started Is Easy!

Cask meets you where your CMDB is today

Need a quick CMDB assessment
and rapid remediation?



CMDB
LAUNCHPAD

Need help managing your
CMDB on an ongoing basis?



CMDB
EXPERT ASSIST

Need to implement or overhaul
ITOM including your CMDB?



CMDB
ESSENTIALS



October 9, 2024 | 9:00 - 9:45 AM PT
**Ins & Outs of Discovery
with CMDB in ServiceNow**

November 13, 2024 | 9:00 - 9:45 AM PT
**CMDB + Asset Management
(Onboarding & Reclamation)**

REGISTRATION PAGE
COMING SOON!



**LOOK FOR INSTALLMENT FOUR
& FIVE COMING OCT + NOV**



Tell us what CMDB topics you
want to learn more about!

.....

Look for a survey
following this session!



Thank you!

Questions?

Email: Madan Raja, madan.raja@caskinc.com

