DO I.T. PEOPLE NEED USER TRAINING FOR THE ITSM TOOL AND HOW TO GET THEM TO ATTEND?

BY: DENIS MATTE

Often IT line managers resist sending their people to the ITSM Tool training. Their thinking is that IT people are "techies" so they can figure this tool out. It is true if the training is only focused on technology, but a successful implementation needs to consider people, process and technology.

Effective training explains the context, purpose and communicates expectations. The context is the different situations when the process and tool should be used. The purpose is the desired outcome to be reached when fulfilling the process. Expectations are the when and the how tasks are to be accomplished in accordance to the business rules and policies of the process.

It is the equivalent of learning to operate a motor vehicle (ITSM Tool). The individual can learn how to start the car, accelerate, turn and stop in a parking lot. But, until it is put in the context of a city street the individual will not use the vehicle according to the rules of the road which have been created to clarify expectations.

Thus, the training is not all about the tool which most IT people can figure out on their own. It is primarily about the process otherwise, people cannot be expected to carry actions or act according to a certain behavior if they have not been instructed to do so.

To ensure people attend the ITSM tool training, have a policy that no one is given access to the production/live environment until they have completed the training. This policy applies equally during the initial implementation as after the tool has been in production and new users are added due to staff turnover.

It is important that Senior Management endorses this policy as it will likely generate friction. Some line managers will object to this policy as it will negatively impact their operation. They may argue that they will not be able to meet their operational commitments if all of their people need to attend training. Moreover, they will claim that they will not meet their SLA because their team will not be able to access the new tool and that it increases unnecessarily the ramp-up time of new employees. Thus, Senior Management needs to remind these line managers that these are all good reasons to ensure that staff is trained as soon as possible to minimize these impacts.

The need for Senior Management support and even perhaps the CIO should not be underestimated since "major new software initiatives frequently end up with only half of the training activity that is really needed if they are to be used effectively. Not only is this false economy, but it is also a root cause of failure for many change initiatives, although it is rarely recognized as such."[1]

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1 The breadth and depth of change is discussed in Elspeth J. Murray and Peter R. Richardson, "Fast Forward: Organizational Change in 100 Days" (Oxford University Press, 2002) p. 20

As it is often the case with new policies, processes need to be adjusted for compliance. In this case the Request Fulfillment process for granting access to the ITSM tool needs to be modified to ensure that access to the production environment is only provided when individuals complete their training.

During the initial deployment of the ITSM tool, all accounts can be bulk-loaded in the training environment/system while accounts in the production environment can be loaded and disabled. Upon completion of a course the trainer can either activate accounts in the production environment for individuals who completed their training, or can email a list to the system administrator(s) for activation. Once the tool is in production, this process can be used to activate accounts on a case-by-case basis for people who have completed their training.

When training and access are administered by different groups, a workflow can be created to manage access for new users. Here is a simple example of tasks for this workflow:

- The system administrator creates an account in the training system
- The trainer receives a task to schedule a training session with the new employee
- Once the training is complete, the system administrator creates the account in the production system
- Finally, the workflow emails the employee to notify them that they now have access to the ITSM tool.

The workflow helps prevent people from breaking the policy that "All users must receive training before accessing the tool." In addition, we have seen organizations extend this policy and process to other systems since training significantly reduces support costs.

About the author:

Denis Matte has over 20 years of IT experience in the private and public sector. As a consultant he helped organizations implement ITSM integrated toolsets and ITIL based processes by designing and managing projects at the operational, tactical and strategic levels. He currently manages the ITSM team in a public organization that administers the ITSM tool and helps internal groups progress in ITIL as processes are improved. Denis Matte is a certified ITIL Expert, Project Manager and Technical Trainer with formal education in Project Management and Management of Change. In his spare time he publishes www.ITILfromExperience.com