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# TRANSFORMING THE EXPERIENCE OF SERVICE TRANSITION PHASE

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## Introduction

In the present times, we are in the peak of technological and business disruptions without any doubt. This has in-turn resulted businesses to be in the middle of fast-paced, evolving, and challenging transitions. Managing the various phases of transitions effectively is key to avoiding low performance phases within the business. Service Transition Management, therefore, needs a fresh perspective and should be driven through an attitude of ownership rather than coordination.

Service Transition Management, by definition, is an important function within the Information Technology Infrastructure Library (ITIL) Framework and a key function for organizations looking to improve continuously. In simple words, Service Transition is managing new and changed solutions until steady support state and handover to the Business as Usual (BAU) Teams. Retired solutions also need Service Transition Management to ensure a proper closure so that there is no impact on the business. One must ensure a smooth journey through various stages with minimal or no disruption to the

business. As seen at a global CPG/Pharma client of Infosys, having a well-defined and comprehensible process is of utmost importance. However, the key to success is to effectively manage people and to bring them around to believe in the defined process. The role essentially demands one to be an unbiased coach as well and have a firm belief in the process itself. For any issues, disputes, disagreements, suggestions, etc. rely on following the process and trust it to throw up the right answer, while remaining open to critical feedback on the process improvement.

The absence of Service Transition practices in projects can cause confusion and chaos among teams involved and have a financial impact on the business. One such example is from an experience back in 2016, a UK based leading Maternity and Kids Retailer, operated their business through a legacy system, IBM System i based JDA MMS. They had a limit of 1 million SKUs that they could use, which were further reduced to 800,000 as 0-200,000 and, were not used. A project team was commissioned to find a solution and they decided to free up SKUs
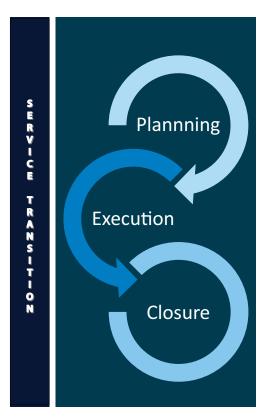
100,000 – 200,000 for use by the business without discussing with the Business as Usual (BAU) support team. A very simple change was suggested, accepted, and implemented in no time. The business users were allotted a fresh set of 100,00 SKUs of which close to 15,000 were allocated on the first day. However, on the following day, multiple issues were reported from the website, "A Toy Chainsaw" listed at £425, later identified as the price of an infant pushchair.

The BAU Support Team knew that the block of 0-200,000 SKUs was used to allocate Item Numbers to Toys from a different system before integration to the Websites for direct sales. The fix was quick and approved as an emergency change. However, by this time, the Merchandisers had allocated over 21,000 SKUs, sent over 10,000 for printing of labels and boxes. The remedial actions cost the business over £16,000. All the rework, and effort by the IT and business teams unaccounted for. Service Transition involvement could have saved this loss of money, time, and effort.

# Service Transition in Practice

As seen from a present client project, where we have successfully transitioned projects into BAU support, here are a few recommended steps in Service Transition to build a simple, effective, adaptive, and reusable Service Transition process. These are discussed as follows.

**SERVICE TRANSITION**

**Plannning**

- Business and IT Stakeholder Identification and Alignment
- Stakeholder Alignment
- Define Service Acceptance Criteria Checklist with entry and exit point of each phase
- Define Phases of Transition
- Business as Usual (BAU) Support Teams Identification
- Prepare a Knowledge Transition (KT) Plan Document
- Prepare Incident Management System for Hypercare Support

**Execution**

- Conduct KT Sessions from Project Teams and BAU Support Teams
- Conduct Reverse KT Sessions from BAU Support Teams to Project Team
- Manage Secondary Phase of Hypercare
- Manage Primary Phase of Hypercare
- Run various Service Transition Checkpoint (or, Gate) (STG) meetings

**Closure**

- Ensure Documentation from each phase prior to Hypercare is comprehensive and shared
- Ensure KT Sessions are completed and signed-off
- Seek approvals for STG meetings
- Move from one phase of Service Transition to the next phase
- Ensure sharing of Known Error Database
- Ensure update to Configuration Management Database System
- Ensure Closure of Hypercare
- Ensure that all relevant communications are published at the end of Hypercare

Figure 1: Briefly touching upon Phases and various actions in Service Transition

## Planning

In the planning phase of our Service Transition, connect with various stakeholders of the project from the project team and the Business Team to understand who the Business Service Owners and IT Service Owners are. Based on this understanding, identify the support functions and teams to be involved. After having done this, revert to the drawing board and come up with a detailed and exhaustive list of action points to be undertaken in this transition called the **Service Acceptance Criteria (SAC) Checklist.** Though there are different action owners for each criterion listed in the checklist, the ownership of the SAC Checklist document itself lies with the Service Transition team. This checklist is discussed with all the stakeholders every week and serves as the sole document to arrive at and adjudge whether the frame of time during the transition is a success or not.

Apart from defining the criteria for successful transition in the planning stage, it is important to identify the various phases of the project. This helps track an exhaustive checklist in a simpler manner based on the current, soon-approaching, for-later, time frames. Generally, the phases Infosys defines are

- **Pre-Cutover**
- **Cutover or Go-Live**
- **Hypercare**
  - *Secondary BAU Support i.e., first half of Hypercare.*
  - *Primary BAU Support i.e., second Half of Hypercare*
- **Hypercare Exit**
- **Complete handover to BAU Support**

Once the SAC checklist is prepared, and all the phases are defined, work through the SAC checklist and monitor that the entry and exit criteria defined for each phase is met before moving from one phase to another.

## Execution

The execution stage of Service Transition starts during the pre-cutover phase of the project where the key action is execution of proper Knowledge Transition (KT) from the Project Teams to the BAU Support Teams. Taking ownership of every KT Session is key and therefore plan and setup each KT and Reverse KT session well in advance during the planning phase as part of a **KT Plan document**. Record each session, obtain every relevant documentation, share them with the relevant teams, and maintain all the information on the **KT Plan document.** This serves as a single document which links to every information for all knowledge transitioned in the project. It is therefore very important to take ownership of the completeness of this document.

It is not only the Knowledge Transition sessions which are part of the execution stage of Service Transition. One needs to pay close attention to being prepared for the actual cutover of the project, preparedness of Hypercare, managing Hypercare, and tracking the numbers (incidents, and Service Requests) logged during the various stages of Hypercare. It is of the utmost importance to ensure BAU Support teams' participation during Hypercare so that they obtain practical knowledge which is required to support the Business at the end of Hypercare.

As discussed earlier as well, the two phases within Hypercare help with a smooth execution and exit points from Hypercare. It initially starts with **Secondary Support** (w.r.t. support provided by BAU), where the project teams lead most of the major incidents-handling, whereas guidance of about 60% of the minor issues are assigned to the BAU Support teams expected to be resolved by them. In the second half of Hypercare, termed as **Primary Support**, higher responsibility is passed on to the BAU Support teams where they are expected to resolve 80% of the overall issues. However, keeping in mind that the ownership of Hypercare always lies with the project, changes and high priority issues are always handled by the Project teams.

While a lot of this sounds like the job of a coordinator and while most of it is coordination among various stakeholders involved in the project, it would be very difficult to do justice without understanding what the project is delivering and being accountable and take ownership of execution of every aspect of transition into stabilized support.

## Closure

The closure in Service Transition is not just the closure of the project and Hypercare Support. It is in fact spread across the Planning, Execution, and the Closure phases and encompasses the successful closure of each phase into the next one. A smooth closure is nothing but ensuring a clean and timely closure of each of the exit points of the present phase, like, sharing the Cutover Plan, Test plan and Results, Known Error Database, etc. with the Support teams, completing all the Knowledge Transition sessions to the satisfaction of the Support teams, maintaining a good score in terms of number of incidents, service requests and Changes Requests, etc.

Any digression from the agreed points in the SAC checklist whether in terms of the process or volume of tickets, etc. needs to be addressed immediately and effectively. If there is rework, it needs to be put into action immediately and closed aggressively. The **checkpoint meetings** where approvals to move to the next stage are sought, called **Service Tollgate Meetings**, as per terminology used by the clients, need to be meetings where these action points are information and not something that is arrived at an answer for. The content and presentation of these meetings must be owned by the Service Transition team as well.  An observation is that the length of these tollgate meetings is a good measure of successful transition of a project; lesser actions and risks, easier it is for the approvers to decide, and therefore, shorter the meetings, smoother the transition, and certainly happier stakeholders. The final and perhaps the most important closure point is issuance of Hypercare Exit communication to the relevant Business Users with guidelines on how to raise any new issues which will now be supported as per the BAU Support model.

# Automation

Even though, the role is fundamentally centric to people, it is essential to keep an eye out for repetitive tasks and any possible opportunities of automation. One such opportunity identified in a current engagement is the Triaging of Hypercare issues. Usage of ServiceNow as the Service Management tool allowed the issues to be assigned to a dedicated Hypercare Resolver Group. All the people responsible for resolving issues during Hypercare are already added to this dedicated Hypercare Resolver Group as preparation for Hypercare. However, a Hypercare Manager is then required to identify which application or process the issue had arisen in and therefore whom the ticket should be assigned to. With the help of an external automation script called, "**The Triage Bot**" termed by the client organization, the assignment of incidents was automated as per inputs received from the end user and mapped to a single point of contact on an assignment matrix. By doing this, 24X7 triaging of incidents was achieved without intervention of the Hypercare Manager. A human intervention is only required if there was a discrepancy between the input received from the end users and the defined set of rules in the assignment matrix for the Triage Bot. One instance of the Triage bot only functions on one ServiceNow Resolver Group and does not interfere with any other functionality of any other application making it a very secure piece of code. Apart from quicker acknowledgement, potentially faster resolutions, a **saving is estimated of anywhere between 90 Person Hours to 480 Person Hours per month** depending upon whether the project requires only office hours monitoring or 24X7 monitoring of issues logged by the business.

## Conclusion

From every transition, it is of the highest importance to takeaway key lessons and use them to improve the next transition. This can only be achieved by remaining open to critical feedback and believing that there is always room for improvement no matter how good the job has been done. As mentioned earlier, the key with Service Transition, like any other process, is people. Therefore, it is important to pay attention to how some people do their job and learn from it. As a Service Transition Manager, you are bound to come across many people and hence, many ways of working. It is not only a good practice to be observant in this role but also extremely productive to be able to learn from fellow colleagues.

To state it simply, perfection in Service Transition Management lies in comprehensive Ownership. In order to allow your Service Transition Process to give you the best possible results, it is necessary to own the planning of the process to perfection, in the initial stages, to own the responsibility to reflect at the process for improvements, towards the end, and, to own everything in between as well.

## About the Author

### Aseem Sharma

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Aseem has 11 years of diverse experience in leading teams for application deployment, application support and maintenance, and service delivery management for large scale deployments. He has provided critical process and business solutions for his clients in the retail and CPG sector. His strength lies in understanding his role and relentlessly working towards optimization of time and effort while getting the job done and skillfully managing all the stakeholders involved.

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