



Found recently and in good condition: the CSI Register

Brenda L. Peery & Stephen Griffiths

The missing tool for practical, systematic Continual Service Improvement

The web is a superb repository of information, knowledge, rumour and gossip, so with the breadth of what is available, it's almost a shock when a web search turns up almost nothing for a term you have seen in daily use. The term was "CSI Register" and even broader searches, such as "CSI Repository", "Continual Service Improvement Log" and even "ITIL and improvement", were disappointing and fragmented. A search in the ITIL v3 CSI Lifecycle volume also resulted in a similar failure to find reference to the Register. Something we consider an essential tool has gone missing. Missing in action, since a quick survey of colleagues indicates that it is in active use in the IT Service Management community.

To understand the use and purpose of a CSI Register, first consider the scope of CSI. CSI stands for Continual Service Improvement and refers to the ITIL v3 set of processes, principles, methods, and techniques that make up CSI. These are seen as encompassing or supporting all other stages of the v3 model: Service Strategy, Service Design, Service Transition and Service Operation. CSI is seen as *driving* improvement through all parts of the model. Where CSI is in place and there are non-IT corporate or business initiatives for improvement, CSI often takes the role of hosting them within the IT department.

It is a broad definition. It reflects the necessity to remediate services that are failing, such as a web portal that cannot cope with peak usage, but also reflects a more general striving for improvement even where current targets are being met. The infrastructure under a service and the framework of processes and functions that manage the service are also considered for improvements. Furthermore, this consideration should span the service lifecycle, from concept, creation, introduction, and operation to retirement. For example, once that web portal service has been improved to cope with today's peak usage, will you have the process in place to ensure business intelligence for next year's peak usage and a mechanism (and personnel) for the timely introduction of new infrastructure to support it?

A CSI Register is a repository in which improvement opportunities are recorded and managed in order to provide a co-ordinated, consistent view of improvement activities. The benefits include; a single central view of CSI initiatives, a consistent method of recording and tracking initiatives to implementation (and beyond) and a system to ensure that initiatives are reviewed, filtered, and prioritized so that all initiatives actioned offer a clearly defined benefit to the business.

You could start simply with a list and the determination to move the items on it forward, but in practice, a CSI Register generally ranges from a spreadsheet or

database to dedicated Service Management software. As far as the tool is concerned, the key is to get quality information in and effective reporting out. The quality and effectiveness will be relative to your specific needs and objectives. Hence, the first requirement is define your CSI Register, giving particular care in setting the scope.

Define the scope.

- Why is it being done?
What is included and what is not? Who will have access?
- Does it link to other corporate initiatives?
For example; strategic initiatives to reduce risk, introduce consistency, cope with a new set of regulatory requirements or drive a desired cultural change?
- What is the relationship to other processes and functions?
When does a CSI initiative become a project? When does Problem Management engage CSI? How can CSI report to customer facing roles, such as Service Level Managers, to keep them abreast of improvement initiatives, potential cost savings, improvements to Vital Business Functions delivery and support services, etc.? Is there a separate repository for Service Improvement Plans (SIPs)?
- Who is the owner or owners?
If possible, make this the senior management board.
- Are there areas of focus that will serve your Service Management programme or IT leadership?
Cost or Waste reduction, Efficiency / Effectiveness, policy or procedure adherence, improving adherence to Service Levels, or improving team, system, service, or process performance.

A careful consideration of scope is necessary to inform and direct subsequent decisions for setting up a CSI Register. You could approach the next steps in many ways, but requirements will generally fall into these areas: defining what goes in a record, how to manage the records themselves, management tasks for the register as a whole and maintaining forward progress.

Other ITIL processes, common sense and practices in place in your organisation will provide a good start. Incident and Problem Management provide general information on record management that is applicable to a CSI Register, such as questions of who can log and how they go about it as well as filtering and prioritising the resulting improvement opportunities. The crucial decisions around management are based on governance, such as how (and with whom) you will review the register, your criteria for approval, how you will assign ownership, how you will handle exceptions, report progress and communicate. Finally, allow plenty of time to engage with the stakeholders to define what goes in a record in order to provide the data that will support the benefits, objectives and requirements determined in your scoping exercise.

Improvement activities are the backbone of IT and take place every day – systems are fixed, capacity is nudged upward, plans are made and executed – all too often without being visible or recognised. A formal Continual Service Improvement

programme introduces greater visibility but linking it to tangible and intangible benefits is a challenge. The CSI Register introduces a focal point into the wider, and sometimes shifting, landscape that makes up CSI – it is the stake in the ground around which you create a practical structure for *executing* improvement.

About the Authors

Brenda L. Peery is an IT Service Management Architect, developing and implementing strategies for effective IT Services & Programmes with business and IT leaders in demanding environments. Brenda is an ITIL Expert, MSP Practitioner, accredited ITIL V3 instructor and is involved in the development of V3 publications and credentials.

Stephen Griffiths specialises in the implementation of best practice solutions. His specialist areas include Service Management, Information Security and Data Centre implementation and management. Stephen is the Managing Director of Whitmore Solutions Ltd, a Fellow of both the Institute of IT Service Management and the BCS. He is the Vice Chairman of the BCS Service Management Specialist Group. He is also actively involved in various Service Management related groups working with the itSMF, the BCS and ISEB.