



## D4.3 Professional training material – foundation level

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### *Internal Deliverable*

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### **Abstract**

This Deliverable is based on the qualification and certification scheme that was the subject of Deliverable 4.2. It lists the different training materials for the FedSM foundation training to ensure the high quality of the course and an effective training for federated infrastructures. The training materials are composed of four different parts: The presentation slides, training handouts, the sample exam and the feedback form. For each training material, its purpose and role within the foundation training program is explained.

**Table of Contents**

- 1. Introduction ..... 3
- 2. Training materials ..... 3
  - 2.1. Overview ..... 4
    - 2.1.1. Presentation slides ..... 4
    - 2.1.2. Training handouts..... 5
    - 2.1.3. Sample Exam ..... 5
    - 2.1.4. Feedback Form ..... 6
- 3. Summary and outlook ..... 6

## 1. Introduction

Introducing IT Service Management (ITSM) typically starts with creating awareness and empowering the people involved to act on the goals related to ITSM. Thus, professional development through adequate education and training is a critical success factor for making ITSM initiatives successful.

The training materials presented in this Deliverable help to perform a high quality foundation training program, which is essential for a successful understanding of federated IT Service Management. The foundation level training program that the training materials are part of, is based on the qualification and certification scheme outlined in Deliverable 4.2 - Qualification and certification scheme.

The purpose of the training materials is to support qualified trainers in holding a one-day FitSM foundation course, in which they provide participants with a general overview of the FitSM standard and an introduction to the general concepts, definitions, activities and processes of service management according to FitSM.

The material consists of four parts: Presentation slides, handouts, a sample exam and a feedback form. The latter three should help participants to follow the presentation by the trainer as well as to prepare for the exam at the end of the course in the best possible way.

The training materials, as well as the qualification scheme, are based on experience from training and certification systems for well-known ITSM standards like ISO/IEC 20000 and frameworks such as ITIL.

This Deliverable defines the training materials for the FedSM foundation level training program that is part of the qualification scheme presented in D4.2..

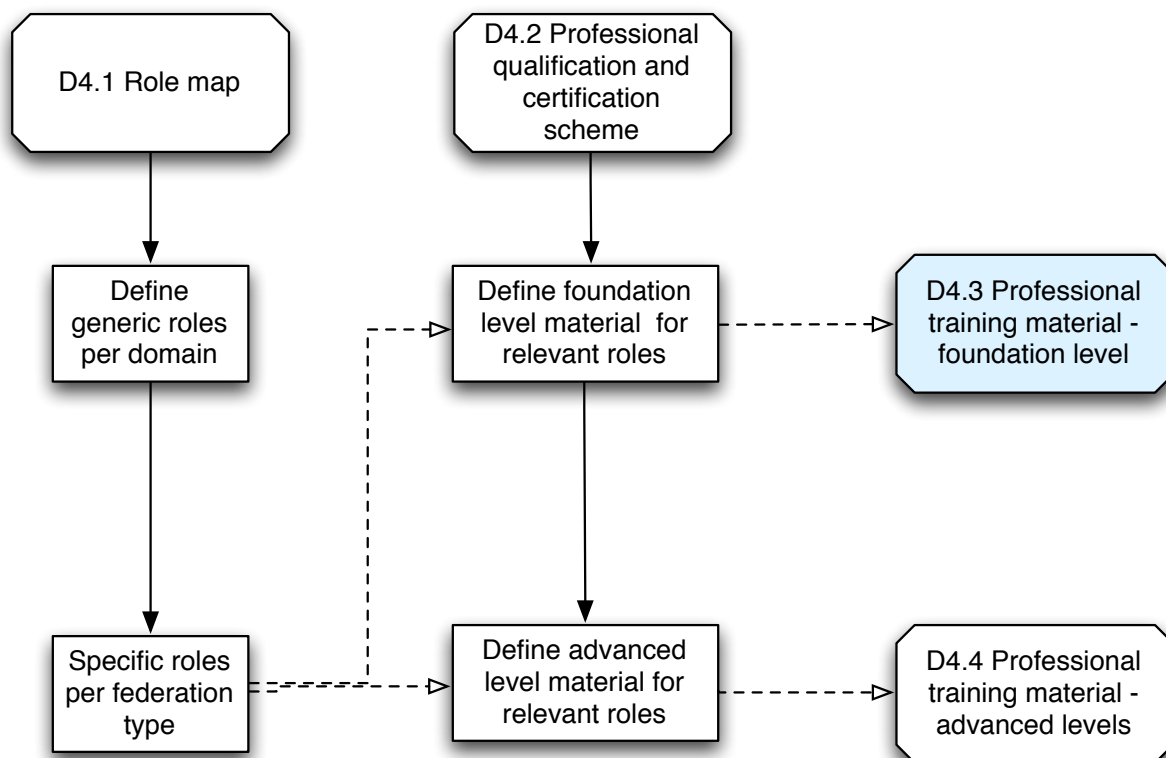


Figure 1: Relationship between this Deliverable and other Deliverables

## 2. Training materials

The training materials presented in this Deliverable are a collection of documents and slides that support the foundation level training program by helping participants to understand federated IT Service management.

## 2.1. Overview

FitSM Foundation training will follow the following timetable (breaks not included)

Topic	Time allotted
Welcome	15 minutes
Introduction to service management	15 minutes
General FitSM basics	15 minutes
FitSM general requirements	30 minutes
FitSM service management processes	135 minutes
Related standards	15 minutes
Sample exam	30 minutes
Discussion of sample exam and final Q&A	45 minutes
Certification exam	30 minutes
Exam results, delivery of certificates, feedback outlook	30 minutes
<b>Total</b>	<b>360 minutes</b>

The training materials consist of four different parts:

1. **Presentation slides:** summarising service and service management fundamentals and the different service management processes of the FitSM standard.
2. **Handouts:** helping the participants to memorise the most important concepts and definitions.
3. **Sample exam:** following the same structure as the real exam gives the participants a concrete impression of the knowledge they should have gained during the course.
4. **Feedback form:** allowing the participants the possibility to share their impressions and experiences of the course and facilitate the continual improvement of trainings and training materials.

### 2.1.1. Presentation slides

The presentation slides contain all of the relevant content for the FitSM foundation certification. In order to ensure the alignment of the presentation slides content with the requirements for the FitSM foundation certification, exam topics and training materials use a common specification matrix (see Figure below), developed in collaboration with Tuev Sued Academy. The FitSM foundation specification matrix resembles the one for the ISO/IEC 20000 foundation certification for personnel, but has been adapted to fit the shorter course format and address federation-specific aspects.

In the beginning, the participants get an overview of the basic concepts of IT service management. Since the course is oriented towards participants with little or no previous ITSM knowledge, relatively ample space is given to the explanation of key terms and definitions and fundamental concepts.

The objective of the second part of the course is to provide participants with an overview of the FitSM service processes, an understanding of the relationships between them and the requirements needed to implement these process successfully in a federated environment. With a weight of 70%, the main focus of the presentation slides lies on this second part of the course, which is again subdivided into two parts (*“Planning and service delivery”* and *“Service operation and support”*), both of which will be treated in more detail in the respective courses of the advanced level.

Specification Matrix							
No.	Topic Level 1 Requirements:	No.	Topic Level 2 Requirements:	No.	Topic Level 3 - The candidate can:	Weight	
1	Service and service management basics	1.1	Understanding service	1.1.1	explain what an (IT) service is	30%	
				1.1.2	describe the components of an (IT) service		
		1.2	Understanding (IT) service management	1.2.1	explain the concept of (IT) service management		
				1.2.2	explain the benefits and risks of (IT) service management		
				1.2.3	describe the role of tools used within (IT) service management		
		1.3	Understanding processes	1.3.1	describe the benefits and characteristics of a process-based approach		
				1.3.2	describe how to measure and control a process		
				1.3.3	explain why and which roles are needed		
		1.4	Understanding continual improvement	1.4.1	identify the principles of the plan-do-check-act cycle		
				1.4.2	describe what maturity is and how maturity models work		
				1.4.3	explain the nature of assessments, reviews and corrective and preventive actions		
		1.5	Understanding the landscape of standards and frameworks	1.5.1	identify the purpose and stakeholder of CMMI, COBIT, ISO 9000, ISO/IEC 20000, ISO/IEC 27000, ITIL®		
				1.6.1	describe the differences between linear chains of responsibility and collaborative approaches to service provisioning.		
		1.6	Understanding the specific challenges of Service Management in federated IT infrastructures	1.6.2	describe different kinds of federation and which approaches to service management are suitable in different cases.		
				2.1	Understanding the processes for Service planning and delivery		2.1.1
		2.1.2	describe the objective, key concepts and requirements of the Service Level Management process;				
2.1.3	describe the objective, key concepts and requirements of the Service Reporting Management process;						
2.1.4	describe the objective, key concepts and requirements of the Service Continuity & Availability Management process;						
2.1.5	describe the objective, key concepts and requirements of the Capacity Management process;						
2.1.6	describe the objective, key concepts and requirements of the Information Security Management process;						
2.1.7	describe the objective, key concepts and requirements of the Customer Relationship Management process;						
2.1.8	describe the objective, key concepts and requirements of the Supplier Relationship Management process;						
2.1.9	describe the objective, key concepts and requirements of the Continual Service Improvement process;						
2.2	Understanding the processes for Service operation and support	2.2.1	describe the objective, key concepts and requirements of the Incident & Service Request Management process;				
		2.2.2	describe the objective, key concepts and requirements of the Problem Management process;				
		2.2.3	describe the objective, key concepts and requirements of the Configuration Management process;				
		2.2.4	describe the objective, key concepts and requirements of the Change Management process;				
		2.2.5	describe the objective, key concepts and requirements of the Release & Deployment Management process;				

Figure 2: Specification Matrix for the presentation slides

### 2.1.2. Training handouts

The training handouts will consist of copies of the slides with room to take hand-written notes during the course and the first two parts of the FitSM standard, FitSM-0:2013 *Overview and vocabulary* and FitSM-1:2013 *Standard requirements for lightweight service management in federated IT infrastructures*. The participants can take the printed handouts with them at the end of the course. (FitSM standard documents are also made available on the internet. Copies of the training slides will not be distributed electronically, in order to comply with the terms agreed with Tuev Sued for using Tuev Sued intellectual property in parts of the slide deck.)

### 2.1.3. Sample Exam

The sample exam helps participants to evaluate the level of knowledge they have gained during the course. It will be held towards the end of the course, followed by a discussion of the correct answers and some final exam preparation with the trainer. The sample exam has exactly the same format as

the real exam (see Figure 3) and consists of 20 questions with four possible answers, of which one is correct (multiple choice).

Foundation in federated ITSM – Exam	
Full name of certification achieved	Foundation Certificate in Service Management for federated IT infrastructures according to FitSM
Prerequisites	None
Exam format	20 questions, “simple multiple-choice”, 4 answer options per question
Duration	30 minutes
Pass requirement	65% of questions answered correctly (13 of 20)

Figure 3: Exam format for the FitSM foundation certificate

#### 2.1.4. Feedback Form

The feedback form, which is distributed at the end of the FitSM foundation course, gives the participants the opportunity to express their level of satisfaction with the course and propose improvements. It contains several multiple choice questions as well as open questions about the perceived suitability and quality of the course content, training materials, delivery by the trainer, etc.

The analysis of participant satisfaction and the recording improvement suggestions are important inputs into the continual improvement process that ensures the maintenance of a high quality training program.

### 3. Summary and outlook

This Deliverable describes the training materials that are used in the FedSM foundation level training program. The training materials consist of presentation slides, handouts, a sample exam and a feedback form. They adhere to a specification sheet that defines common topics for the course and the certification exam and thereby facilitate the delivery of FitSM foundation courses with a consistent scope and quality. The training materials can be seen as a partial implementation of the *Qualification and certification scheme* described in *Deliverable 4.2*. The feedback form and some elements of presentation slides, e.g. layout templates, can be reused in the training materials for the advanced and expert level training materials to be delivered with *D4.4 Professional training materials – advanced levels*.

## Version History

Version	Date	Author	Change record
0.1	21.06.2013	S. Grois	Skeleton
0.2	24.06.2013	M. Brenner, S. Grois	Review version
1.0	04.07.2013	M. Brenner	Deliverable version
1.01	08.04.2014	M. Brenner	QA Review

