



Standards for lightweight
service management in
federated IT infrastructures

Guide: Specifying Services for Portfolios and Catalogues

This document is a guide for specifying services for Service Portfolios and Service Catalogues. Version 0.8 (2014-02-21)

1. Context

This is a guide for specifying services as part of a Service Portfolio or service catalogue. Service Portfolios let organisations understand what services they provide and have a consistent set of data about them to support service management. Service Catalogues contain similar information but are a customer-facing view showing them what services they can receive and under what conditions.

This guide may be used in the context of the following various FitSM components (found at www.fitsm.eu). This guide related to the following components:

- Template: Service Portfolio and Catalogue (version 1.0)
- Sample: Service Portfolio and Catalogue (version 1.0)

The Services to be specified can be identified with the following FitSM component:

- Guide: Identifying Services

Applying this guide may support compliance against the requirements listed in FitSM-1. More specifically, this guide refers to the following requirements:

- FitSM-1:2013 PR1.1: A Service Portfolio shall be maintained. All services shall be specified as part of the service portfolio.
- FitSM-1:2013 PR2.2: A service catalogue shall be maintained.

This file is part of the FitSM series of standards for lightweight service management in federated IT infrastructures. It is intended to support the implementation (IT) service management following the FitSM approach or related frameworks.

For more information see www.fitsm.eu.



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2. Identifying Services

The purpose of a Service Portfolio is to understand, both internally and externally, what services an organisation provides. This is necessary for effective service management as much of it is arranged and managed by service. A Service Portfolio also helps create an internal awareness within the organisation of the concept of a 'Service' from an ITSM point of view, rather than a more technology-orientated point of view (which tends to refer to Service Components as Services). Services can be identified using the FitSM component Guide: Identifying Services.

The Service Catalogue is a customer-view of the same set of information, showing potential customers what services are available. This aligns the internal and external view on what customers are offered, which eases customer relationship management.

3. Basic Information

Specifying services should begin with basic information about the service: **Name**, **Service Description** and **User of the Service**.

Service names should be descriptive from a customer point of view, and should be quite simple, such that someone non-technical has a chance of understanding what the service is. Service descriptions should be similar, and consider the value provided by the service, in fairly non-technical terms. These descriptions may seem obvious but help everyone within the organisation understand the service, and also will be needed for the Service Catalogue, which will be shown to users and customers. User of the Service should consider the direct beneficiary of the value provided by the service, not downstream beneficiaries or those perhaps paying for it.

This information will be required for both the Service Portfolio and Service Catalogue, though the information may be phrased differently for the internal (Portfolio) and external (Catalogue) audiences.

4. Service management Information

This section considers basic information related to service management, specifically related to responsibilities, contracts and agreements. This basic information can be collected and defined even without a mature IT service management approach, and as a first step in managing services.

4.1. Service Owner

For each service, an owner should be assigned. This is the individual who has accountability for the whole service, from a management point of view. They will have an understanding of the service from technology through to user, and maintain an overview of the effectiveness and success of the service. They should sufficiently senior to fulfil this role, so have management experience of some sort, not just operational experience.

This information is only available in the Service Portfolio, as customers do not need to know which manager is responsible for each service.



4.2. Contact Information (Internal)

This is the agreed contact within an organization for communications, questions and issues relating to the service. At first it may be the personal contact information of the Service Owner, and this may be sufficient in small organizations, but it is preferable to move toward a more generic email contact such as owner.servicename@companyname.com. Having a generic or role based contact makes it easier to cope when staff are absent, or when a role such as Service Owner is moved from one individual to another.

This information is provided in Service Portfolios but not in Service Catalogues.

4.3. Contact Information (External / customer)

The agreed contact for enquiries regarding the service from an external or customer point of view. This is likely to be used by those considering making use of the service, rather than those already using the service who will use support contacts (going through Incident and Service Request Management) and customer contacts (going through Customer Relationship Management).

In general a generic contact such as servicename.enquiries@companyname.com (which in effect directs enquiries to the Service Owner) is the easiest option, though it could also direct to a sales team or other appropriate group within the service provider.

This information is intended to be in the Service Catalogue, and while it can also be held in the Service Portfolio, it should be clearly marked as for external rather than internal use.

4.4. Service Status

Service Portfolios should include not only services current offered, but also those offered in the past, and those planned for the future. Decommissioned services are included as some services may no longer be offered, but may be still operated for certain legacy customers. Equally, some decommissioned services may still impose obligations that persist after the services are decommissioned and no longer used (such as data protection obligations). The basic statuses of series are likely to be some version of 'past', 'present', and 'future'.

The Service Status is only displayed in the Service Portfolio, as the Service Catalogue is essentially a filtered subset of only those services that are categorised as 'present' services currently offered to customers.

4.5. Service Area/Category

If an organisation provides multiple services, they are likely to want to categorise them in various ways. These can be internal classifications (perhaps related to departments, or physical locations) or external ones that are of interest to a customer. Each organisation will create different areas or categories, but while internal classifications may come first, it is important to consider whether these are useful or appropriate for customers before exposing them.

Service Areas or Categories are not obligatory (for instance for a single service organisation) and may be in both the Service Portfolio and Service Catalogue, though they may be different categorisations, or at least phrased in different ways.



4.6. Service Agreements

All services come with some form of agreement on how they are provided, even if they are ‘there is no agreement, you use it as it is’. More traditionally there will be a Service Level Agreement (SLA) attached to the service. It is very important that this is listed for all services, though it may change over time, especially as service management is initially introduced when the agreement will evolve from ‘nothing’ to quite a comprehensive agreement in a short period of time. However, whatever the current agreement is, it should be made explicit. This is needed internally, as many other aspects of service management are aligned to the agreement – for instance service reporting will generate reports based on what is agreed with customers in service agreements. If the agreement is ‘use it as you find it’ then no reports are promised and service reporting is very simple. If you have a complex SLA promising weekly custom reports, the work of service reporting is much more complicated.

Service Agreements should be included in both the Service Portfolio and Service Catalogue, though they may be shown in different ways.

5. Detailed Makeup

This section looks at how the service is delivered in more detail. For many organisations what they may previously have considered ‘Services’ are now considered ‘Service Components’ from an IT Service Management point of view.

5.1. Core Service building blocks (components, activities etc.)

This section considers what activities the provider must undertake to make the service available. It will be a list of components, many of which may be technical, more so than the list of services, which should be described in a more value-orientated way.

This will include generic components that may be attached to every service, such as network or helpdesk. Others may be more service-specific such as a particular web service needed for a single service. This list tends to map well to lists of activities or technical services that many organisations hold before they begin with formal IT Service Management.

The core service building blocks are those that must be available for the service to be provided, and are at used or at least available to all customers.

The core service building blocks are available in the Service Portfolio but not the Service Catalogue.

5.2. Additional Service Building Blocks

This section considers components that may be offered to come customers but are additional or optional to the core service. These may be value-add elements over and above the core service that add to it. An example might be that a storage service may work as a plain network storage service using crucial components, but may offer an additional feature of version control that is not required to use the services, but is a value adding option the service provider offers.

These are listed separately to core building blocks because, for instance, failure of additional blocks is of a lesser urgency than failure of core blocks, as additional blocks are used by a subset of customers. Hence they are considered differently in a service management context.



Additional building blocks are listed in the Service Portfolio but not the catalogue, as the same information is captured in a different way in the Service Catalogue, as Service Packages.

5.3. Service Packages

Service packages are collections of the core components with different sets of additional components that are offered to customers. To continue the example above there may be a base package called 'storage' and an enhanced package called 'versioned storage', There may then be a more complex enhanced package such as 'versioned, multiply redundant storage' that is made up of the core components plus a versioning component and a multisite redundancy component.

These Service Packages should be created and named with the customer point of view in mind, so be clearly labelled and offer clear value. Should a provider require different descriptions internally these should be listed as additional components not as service packages.

Service Packages will be primarily created for the Service Catalogue, but will also be listed in the Service Portfolio such that the provider understands which additional components map to each service package.

5.4. Dependencies

In some cases a service may be built up not only from components, but also from whole other services combined with additional components. In this case there is a dependency between one service and another, and it makes more sense to list the dependency on the other service as a whole rather than simply the components within it. However, if there is a service listed as a dependency it must also be listed in its own entry in the Service Portfolio.

Dependencies are listed only in the Service Portfolio and not the Service Catalogue.

6. Business Case

This section sets out factors connected to the service in a business sense, considering issues of finance, risk management and value delivery. These may seem quite different to the more technical or IT Service Management aspects considered above, but are important to consider and must be considered per-service. This section may be hard to fill out when first describing a service in terms of service management, but should be nonetheless attempted.

6.1. Cost to provide

It is important to consider how much it costs to provide a service, whether or not you charge for it. Having considered the components required for a service, it is possible to split the cost of providing the component such as a helpdesk (e.g. staff, offices, IT costs), across the services that make use of it.

Cost should be provided in a unit that makes sense for the service, such as €/terabyte for storage, or €/CPU hour for processing. For subscription-based services it may be cost per month for access.

At first this cost may be a rough estimate, but this should be refined over time, which will often be made easier by implementing other aspects of service management.

This information is provided only in the Service Portfolio and not the Service Catalogue.



6.2. Funding source

Having determined the cost to provide the service, it is then important to establish where these funds will come from. This can be based on payment from customers, payment from donors or funding bodies or perhaps from internal resources. This is important as to ensure sustainability; costs and funding sources must be aligned and understood.

Options include pay per use, subscription, pay per unit, indirect via a funding body, or based on income from other organizational sources.

This information is provided only in the Service Portfolio and not the Service Catalogue.

6.3. Pricing

This is the price charged to customers, if one applies. If offered through a model such as pay per use where price applies, then it is likely to be the cost to provide plus some overhead or profit. For instance “cost plus 10%” would be a standard pricing approach. If there is no price (if, for instance, the service is indirectly funded) then this should be indicated.

This information is in both the Service Portfolio (where it may include a breakdown of the constituent elements) and in the Service Catalogue (where it will be a plain price).

6.4. Value to Customer

This should capture what needs this service meets on the customer side. Why it is beneficial for them? What problem does it solve? Why is it the best solution for them? This supports marketing and promotion of the service. Even if the situation involves an existing technology you wish to push to a new community, you should attempt to capture some motivation on their part to adopt it, whether it is utility, ease of user, cost or even social factors such as desirability or ‘coolness’.

Value to Customer should be included in both the Service Portfolio and Service Catalogue, though they may be shown in different ways (one internal, one external).

6.5. Risks

What risks are presented to the supplier in delivering the service? While many risks can be thought of, here you should list the major ones. For a paid service, this may be lack of customers willing to pay. For an indirectly funded service, not being able to meet the promises made to the funding body. Here it is important to consider the bigger picture with regards to the service and the service provider. Understanding the risks allows them to be balanced against benefits, and lets the service provider understand which services it is beneficial to offer.

Risks are listed in the Service Portfolio, not in the Service Catalogue.

6.6. Competitors

While it is important to define yourself based on your value proposition, it is always necessary to consider competing services. Even if your solution is better and cheaper, perhaps the cost for customers to switch from the market leader to you is too high to make your service viable. In this section you should mention the major competitors to your service. This supports decision making regarding whether the service is strategically appropriate to offer.

Competitors are listed in the Service Portfolio, not in the Service Catalogue.