Incident Management and Request Fulfillment
Project Charter

Wright State University
Computing and Telecommunications Services (CaTS)

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1.1 Project Sponsors

Sponsor	Representing	Contact Information
Craig Woolley	CaTS - Information Services	x4008
Kenny Coon	CaTS - Client Services	x4822
Larry Fox	CaTS - Technical Services	x4009

1.2 Project Definition

The Incident Management and Request Fulfillment project is focused on developing and implementing best practice for both processes under IT Service Management (ITSM) best practices. The basis for the best practices will be the Information Technology Infrastructure Library (ITIL) framework.

1.3 Project Scope

Within the scope of this project:	Outside of the scope of this project:
Request Fulfillment process design	Specific, low level work procedures for completing incident or service requests
Incident Management process design	Any ITIL processes outside of Incident and Request Fulfilment with the exception of high level service catalog discussion for categorization and basic CMDB focused on SCCM discovery
Initial categorization of CaTS services	
Establishment of CaTS assignment groups	
Establishment of CaTS standard service level targets (impact, urgency, and priority) for response and resolution	
Establishment of functional and hierarchical escalation procedures	
ITIL overview session to familiarize project team members with ITIL concepts	

1.4 Organizational Scope

Within the scope of this project:	Outside of the scope of this project:
All CaTS departments who record requests via HEAT, receive escalated requests via HEAT, or who interact with WSU users/customers	CaTS billing system applications/processes (will be considered in future phases when ServiceNow is production)
External departments who receive escalated incident or service requests from CaTS	
HEAT ITSM application	
Service Now ITSM application	

1.5   Project Objectives

- Develop and implement single and repeatable Incident Management and Request Fulfillment best practice processes
- Clearly define the roles and responsibilities required to execute the activities of Incident Management and Request Fulfillment processes
- Identify the key policies that support the Incident Management and Request Fulfillment processes
- Improve the response and resolution times associated with incidents and service requests
- Identify the Critical Success Factors, Key Performance Indicators and Activity Metrics for Incident Management and Request Fulfillment processes

1.6   Project Benefits

- Improved response to service disruptions
- Improved customer relationships
- Better alignment between the business and IT
- Improved Incident monitoring and reporting capability
- Improved cooperation and communication between existing IT functional groups

1.7   Project Approach

The development of the Incident Management and Request Fulfillment processes will be lead by a Process Manager. The project team will have a cross representation of the CaTS functional groups to provide an overall and end-to-end perspective.

A Strategic Advisor will be utilized to provide ITSM and project guidance.

The Process Manager will also fill the role of the Project Manager. The Project Manager will work closely with the team to ensure the project tasks are completed on time.

The team will meet on a weekly basis, for no more than 1.5 hours. There may be work assigned via an action item register to be completed outside of weekly meetings.

1.8   Project Deliverables

The following deliverables are required from this project:

- Incident Management processes in line with ITIL best practice framework
- Request Fulfillment process in line with ITIL best practice framework
- CaTS – Client Services Help Desk as a Single Point of Contact (SPOC) for all CaTS users/customers
  - o Variations of SPOC functionality will be used with a focus on quality, timeliness, and efficiency

- All user interactions recorded in single ITSM application (ServiceNow)
- Develop a framework for a future Service Catalog, aligning Incident and Request categories to the Service Catalog
- Establish incident and request prioritization based on impact and urgency, in line with ITIL best practices
- Establish Service Level Intentions and Targets (SLIs and SLT's), aligning with priority matrix
- Standard Incident Management and Request Fulfillment process used across all CaTS departments, and external service departments utilizing the Help Desk as their SPOC (e.g., CTL LMS support)
- Establish functional and hierarchical escalation procedures
- Establish roles and responsibilities within all functional groups
- Establish Critical Success Factors (CSF) and Key Performance Indicators (KPI) for Incident Management and Request Fulfillment processes
- Incident Management & Request Fulfillment process documentation, including workflow diagram(s)
- Incident Management & Request Fulfillment process training plan for current and future CaTS staff

1.9 Project Constraints

Project Constraints	Impact (high, medium, low)
Aggressive project timeline	Medium-High
Lack of ITIL knowledge by project team	Medium

1.10 Project Risks

Project Risks	Likelihood (high, Medium, Low)	Impact (high, Medium, Low)
Resource availability due to project and operational work load	Medium	Medium
Lack of technical knowledge with new ITSM tool (ServiceNow)	Medium	Medium

1.11 Project Resources

List the Incident Management and Request Fulfillment Project Resources:

Executive Project Champion – Craig Woolley, CIO
Provide overall business direction for the project.

Responsibilities include:
- Approve the project charter and plan (confirm the goals)
- Secure resources for the project
- Keep abreast of major project developments and activities
- Make decisions about project changes (scope creep) with steering committee
- Secure executive level communication to those affected by the project as needed

Functional Project Champion – Kenny Coon, Director of Client Services
Participates in the entire project lifecycle ensuring completion

Responsibilities include:
- Provide or secure functional expertise for the project – subject matter expert(s)

Project and Process Manager – Jonathan Jackson, Manager of Desktop Services; with ServiceNow implementation project management support from 3rd-party implementation provider.

ITSM Steering Committee
Craig Woolley, CIO
Kenneth Coon, Director of Client Services
Larry Fox, Director of Technical Services
Vacant, Director of Information Services *(fulfilled by Craig Woolley)*

Responsibilities include:
- Strategic focus on long term efforts of ITSM program.

Project Team Members:
1. Kenny Coon (Client Services Director) ITSM Strategic Advisor
2. Jonathan Jackson (Desktop Services Manager) Project and Process Manager
3. Michael Rauch (End User Support Specialist & ServiceNow Admin, Client Services)
4. Marijane James (Help Desk Supervisor, Client Services)
5. Debbie Whisler (Labs & Classrooms Supervisor, Client Services)
6. John Remley (Systems Security Engineer, Information Security)
7. Teresa Peters (Programmer/Analyst, Distributed Information Services)
8. Jason Kohlhepp (Application System Administrator, Information Services)
9. Ed King (Sr. Programmer/Analyst, Information Services)
10. James Cooper (Workstation Systems Engineer, Technical Services)
11. Andy Montesano (Video Technology Services Manager, Technical Services)

12. John Gabriel (Network Design Architect II, Technical Services)
13. Kim Tusing (Project Coordinator, Telecom, Technical Services)
14. John Meyers (Network Design Architect III, Technical Services)
15. Jeff Bowman (User Accounts Administrator, Technical Services)
16. Mendy Beverly (Operations Manager, Technical Services)

Responsibilities include:
- Accept tasks and complete them on time, working alone or with a team
- Interact constructively to help develop a solution that will work for you and for other departments
- Understand the work to be completed (ask questions – the more questions the better the result at the end of the process – often people assume things differently)
- Complete research, data gathering, and analysis as needed
- Inform the project manager of issues, scope changes, risk and quality concerns
- Pro-actively communicate status to CaTS stakeholders
- Manage expectations

1.12 Project Measures of Success

- Development and implementation of a single, definable and repeatable Incident Management and Request Fulfillment process
- Decrease in the length of service disruptions
- Improved response and resolution times to service disruptions and inline with established service level targets
- Improvement with communication of incidents to the business and CaTS staff
- Increase customer satisfaction
- Improved capability for initiating continual service improvement activities using data recorded in ServiceNow.

1.13 Project Assumptions

- Senior Management will provide active and vocal support for the project
- Sponsors or designees will ensure the required people resources are available
- Time will be provided to develop and implement both processes

1.14 Time Scope

Project Phases	Expected Start Date	Expected End Date
ITIL Overview/Training for project team (provided internally)	10 March 2016	10 March 2016
Project Initiation/Kickoff	17 March 2016	N/A
Process Development	17 March 2016	26 May 2016

Processes Implemented in SN*	TBD	
Project Evaluation	31 May 2016	3 June 2016
Project Closing	6 June 2016	10 June 2016

* Dependent on parallel implementation project for ServiceNow (SN)

1.15 Project Charter Acceptance

The signatures below indicate the undersigned have read and agreed to the contents of the Project Charter and have given approval for the project to be initiated.

_____   1/27/16
Executive Project Champion   **Date**

_____   26 Jan 2016
Functional Project Champion   **Date**

_____   1/27/16
Additional Project Sponsor   **Date**

Jonathan R. Jackson   Jan 27, 2016
_____
Project & Process Manager   **Date**