



From Service Desk to Scrum Team

Unexpected Career Opportunities in IT

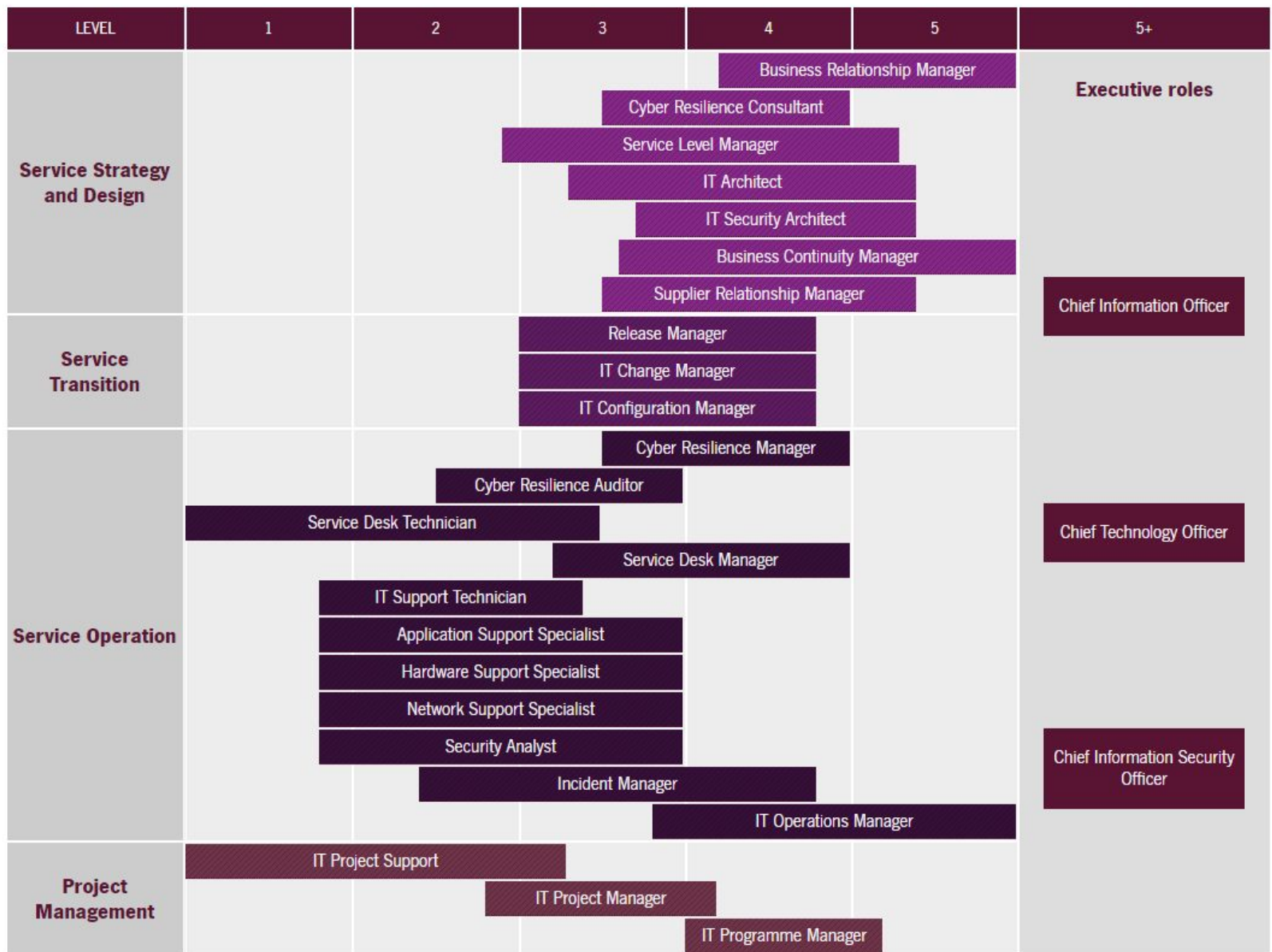
Joleen Locanas MAOL, PMP
IT Business Analyst
UC Berkeley Shared Services – IT



Overview

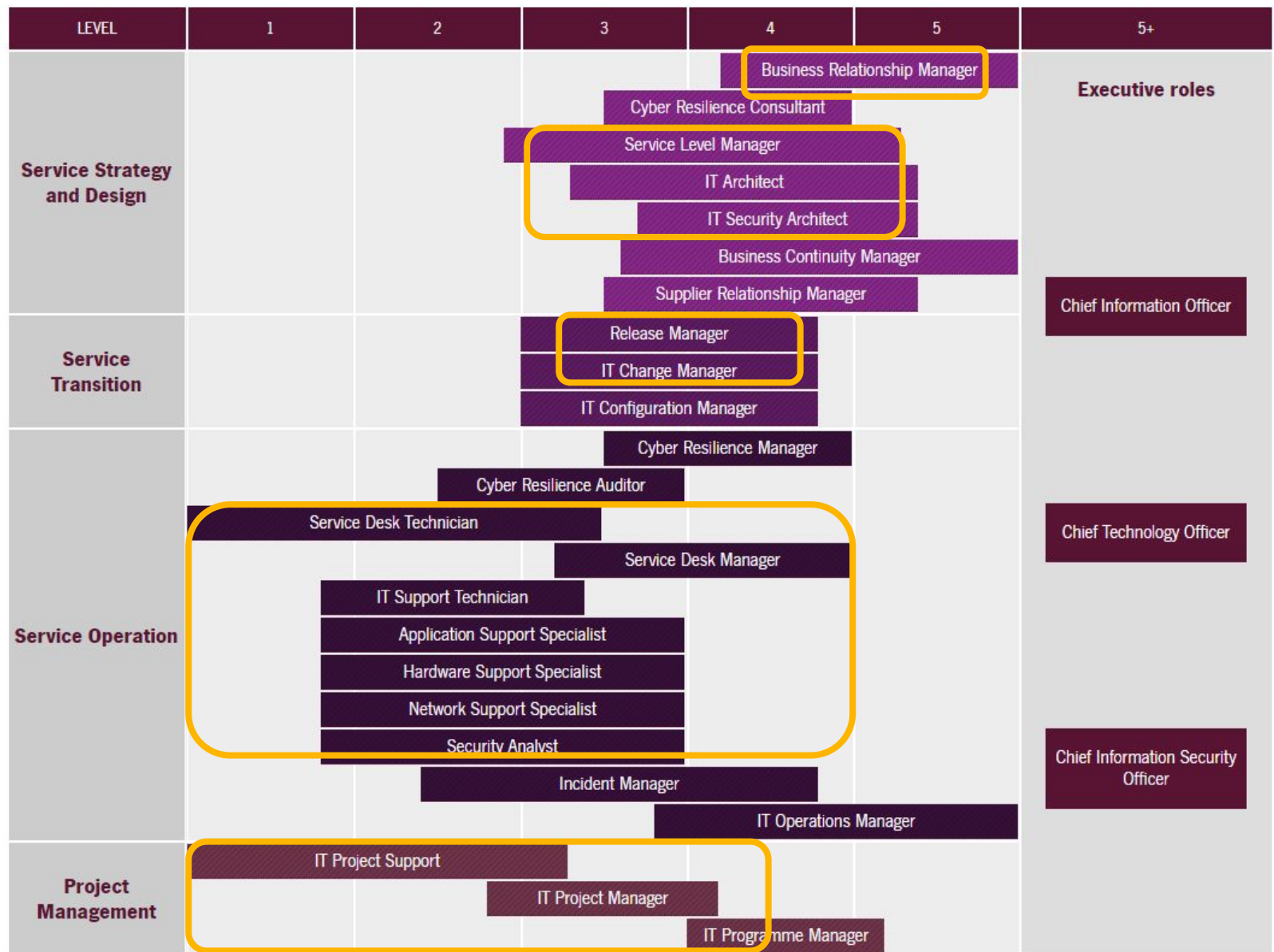
1. ITSM Career Paths
2. An IT career path case study
3. Agile Scrum for project portfolio management (non-software development use)

ITSM Career Paths



Axleos ITSM Career Paths

From <https://www.axelos.com/enhance-your-skills-with-axelos/career-paths/itsm-careers-path>



UC Berkeley ITSM Career Paths

Why Build Career Paths?

Individuals Gets	Team Gets	Benefits	Enabler(s)
	x	1 List of skills to add to training and assessment tool	Professional Profile of Individuals
x	x	2 Structured work environment using Agile Scrum	Strategic Decision Making Process Informing Scrum Team Priorities
x		3 Stretch Opportunities for individuals	Project Management Best Practices ITIL Framework
	x	4 Improved resource management and coverage	
x	x	5 Accountability	Practicing Agile Scrum
x	x	6 Succession pipeline	Review of individual's current job portfolio
	x	7 Adaptable and flexible team to work on a variety of assignments	Skills Assessment Peer Training
x	x	8 Align professional aspirations with work outcomes	Professional Profile Skills Assessment Apprenticeship & Collaboration on Assignments
	x	9 Profile of skills and talents on the team	Professional Profile Skills Assessment Well Defined Roles (for team and individuals) via strategic decision making process and Scrum structure
x		Peer training and experience 10 (e.g. don't have to take formal classes on your own time to gain the same type of experience)	Strategic Decision Making & Projects Agile Scrum Environment Apprenticeship & Collaboration on Assignments Resource Page in Wiki

A Win-Win for Individuals & Organization!

Roadmap Career Paths

Mapping to Roles in CSS IT										
ITIL Service Management Stages	ITIL Career Track	Technicians	Service Desk Agent	Purchaser	Security Analyst / System Administrator	IT Business Analyst	Team Leader	Supervisor	Service Desk Manager	Director / Executive
Service Strategy & Design	Business relationship manager									
	Cyber Resilience Consultant									
	Service Level Manager									
	IT Architect									
	IT Security Architect									
	Business Continuity Manager									
	Supplier Relationship Manager									
Service Transition	Release Manager									
	IT Change Manager									
	IT Configuration Manager									
Service Operations	Cyber Resilience Manager									
	Cyber Resilience Auditor									
	Service Desk Technician		x							
	Service Desk Manager									
	IT Support Technician	x	x							
	Application Support Specialist		x							
	Hardware Support Specialist	x								
	Network Support Specialist		x							
	Security Analyst				x					
	Incident Manager									
Project Management	IT Operations Manager									
	IT Project Support					x				
	IT Project Manager					x				
	IT Program Manager									

Based on ITSM career path model, identify skills and roles needed in the organization

1 - Build Career Paths by Role

ITIL Role	What They Do	Typical Tasks	Potential Next Steps	Skills And Abilities
IT Project Support a.k.a. Project Administrator, Programme Administrator	For those new to project management, the support role offer a possible first step. As the name implies, the role is responsible for supporting a project/programme team in all areas of a project's activities. The scope and level of responsibilities of the support role varies significantly between project and organizations. Individuals may be assigned to a large project or programme, or they may work within the Project Management Office (PMO) providing administrative support to a portfolio of programmes. Working as IT Project Support provides opportunity to build familiarity with project tools and the project environment, and how to work successfully in the project environment. The role	Set up and maintain project files Collect actual data and update project forecasts	Project Manager Service Desk Technician	Successful IT Project Support staff will have v communication skills and be committed to pro Portfolio, Programme and Project Support

IT Business Analyst: Project Management Track

Current Role \ Potential Next Steps	IT Project Manager	Service Desk Technical	Service Level Manager	IT Program Manager	Business Relationship Manager	Business Analyst	Executive Roles
IT Project Support	x	x	x				
IT Project Manager				x	x	x	
IT Program Manager							x

2 - Inventory of Skills by Role

			Desktop Support (Zones)	Engineering & Security	Procurement & Provisioning		Service Desk		Special Operations	
				Security Analyst / System Administrator						
ID	Items	Category	Technicians		Technicians	Purchaser	Service Desk Agent	Technicians	IT Business Analyst	Technicians
104	KALX Radio	IT Service	1 - General K				1 - General K			1 - General K
105	Residential Cable TV	IT Service	1 - General K				1 - General K			1 - General K
106	Open Berkeley Managed Website Platform	IT Service	1 - General K				1 - General K			1 - General K
107	Web Accessibility Consulting	IT Service	1 - General K				1 - General K			1 - General K
108	Web Hosting (Drupal and WordPress)	IT Service	1 - General K							1 - General K
109	Web Hosting (UNIX)	IT Service	1 - General K					1 - General K		1 - General K
110	Web Hosting (Windows)	IT Service	1 - General K					1 - General K		1 - General K
111	ITIL v3 Foundation	Certification	Required	Required	Required	Required	Required	Required	Required	Required
112	PMP	Certification							Nice to Have	
113	PMP-BA	Certification							Nice to Have	
114	PMP-ACP (Agile)	Certification							Encouraged	Encouraged
115	Lean Six Sigma - Green Belt	Practioner							Encouraged	Encouraged
116	Lean Six Sigma - Black Belt	Practioner								
117	IIBA - Level 2	Certification							Nice to Have	
118	IIBA - Level 3	Certification								
119	IIBA - Level 4	Certification								
120	Business Relationship Management	Practioner	Nice to Have		Nice to Have	Nice to Have	Nice to Have	Nice to Have	Encouraged	Encouraged
121	Service Level Management	Practioner	Nice to Have				Encouraged	Encouraged	Encouraged	Encouraged
122	SaaS Vendor Management	Practioner							Encouraged	Encouraged
123	Lean IT - Foundation	Certification							Encouraged	Encouraged
124	SQL Query	Practioner								
125	Database design/build/mangement	Practioner								
126	Consultative Skills	Classroom Training	Required	Encouraged	Required	Required	Required	Required	Required	Required
127	Coaching Fundamentals	Classroom Training							Required	Required
128	Change Management	Classroom Training	Required	Encouraged	Encouraged	Encouraged	Encouraged	Encouraged	Required	Required

3 - Create Team Development Plan

			Team: Service Desk				Team Member: Oski Bear Primary Role: Technician			
ID	Skills	Category	Service Desk Agent	Technicians	Training Priority	Desired Proficiency in 6-12 months	Self Assessment Date Jan 2018	Self Assessment Date Jul 2018	Self Assessment Date Jan 2019	Self Assessment Date Jul 2019
73	Digital Humanities Research Support	IT Service								
74	Museum & Collections Informatics	IT Service								
75	Research Computing (HPC, Cloud, and AEoD)	IT Service								
76	Aggresove IP Distrubution (AID) List	IT Service								
77	Application Security	IT Service	1 - General K	1 - General K						
78	California State CPHS Data Security Assessment	IT Service								
79	Data Security & Privacy Contract Reviews	IT Service								
80	Log Correlation	IT Service	3 - Deep Und	3 - Deep Und	High	2 - Working k	0 - No Knowl			
81	MSSEI Assessment Service	IT Service	1 - General K	1 - General K						
82	NetReg	IT Service	1 - General K	2 - Working K						
83	Network Intrusion Detection Systems	IT Service								
84	Restricted Data Management (RDM	IT Service								
85	Vendor Security Assessment Program	IT Service	2 - Working K	1 - General K						
86	Vulnerability Scanning	IT Service	1 - General K	2 - Working K						
108	Web Hosting (Drupal and WordPress)	IT Service								
109	Web Hosting (UNIX)	IT Service								
110	Web Hosting (Windows)	IT Service								
111	ITIL v3 Foundation	Certification								
112	PMP	Certification								
113	PMP-BA	Certification								
114	PMP-ACP (Agile)	Certification								
115	Lean Six Sigma - Green Belt	Practitioner								
116	Lean Six Sigma - Black Belt	Practitioner								
117	IIBA - Level 2	Certification								
118	IIBA - Level 3	Certification								
119	IIBA - Level 4	Certification								
120	Business Relationship Management	Practitioner								
121	Service Level Management	Practitioner								
122	SaaS Vendor Management	Practitioner								
123	Lean IT - Foundation	Certification								

4 - Empower Staff to Choose Their Path

IT Business Analyst: Joleen Locanas - 9/2017							
Knowledge Areas	Proficiency Self Assessment			Training Priority	Target Proficiency		
	Not Familiar	Basic Knowledge	Working Knowledge		ITTA	ITBA	
1 IT Infrastructure: System Administration, Network, Security, Data Warehousing, Servers, Telecom	C	D		High	Working Knowledge	General Knowledge	
2 Managed Desktop Environment: e.g., AD, BigFix, Imaging, Packaging		C		Low	Working Knowledge	General Knowledge	
3 Service Desk/ Application Support / Referral		C		Low	Working Knowledge	General Knowledge	
4 Project Management: Agile/ SCRUM/ Waterfall			C	Low	General Knowledge	Working Knowledge	
5 Desktop Support/ Remote Support: e.g., Linux, Unix, Apple OS, Windows OS, Mobile OS	C	D		High	Working Knowledge	General Knowledge	
6 Business Process Analysis / Functional Analysis			C	Low	General Knowledge	Working Knowledge	
7 ITIL / Service Management /Service Delivery / Service Catalog			C	Low	General Knowledge	Working Knowledge	
8 Lean SixSigma for Service / Lean IT		C	D	Low	General Knowledge	General Knowledge	
9 Client Portfolio / Case Management / Enhanced Client Support-Relationship Management	C	D		High	General Knowledge	General Knowledge	
10 Database Management, SQL,Data Modeling, Data Analysis		C	D	Low		General Knowledge	
1) For each Knowledge Area, enter the letter "C" for your current proficiency level (column c,d,e) - Not option							
2) For each Knowledge Area, enter the letter "D" for your Desired (professional development interest) proficiency level (column c,d,e) - Optional							
3) Identify your role as ITTA or ITBA							

Supervisor & employee together set professional development goals based on employee interest and team needs.



Service Desk to Scrum Team

An IT career path case study

Profile of a UC Berkeley IT Business Analyst

1. 6 years: 2012–2018
2. 4 roles: Service Desk Lead, Service Management Coordinator, Project Manager, IT Business Analyst
3. 9 different supervisors
4. 3 different departments
5. Certifications: ITIL Foundation, PMP
6. Professional Development: Consultative Skills, Change Management ADKAR, Coaching Fundamentals CTI's Co-Active Coaching Method, Achieving IT Service Excellence w/ Ouellette & Associates

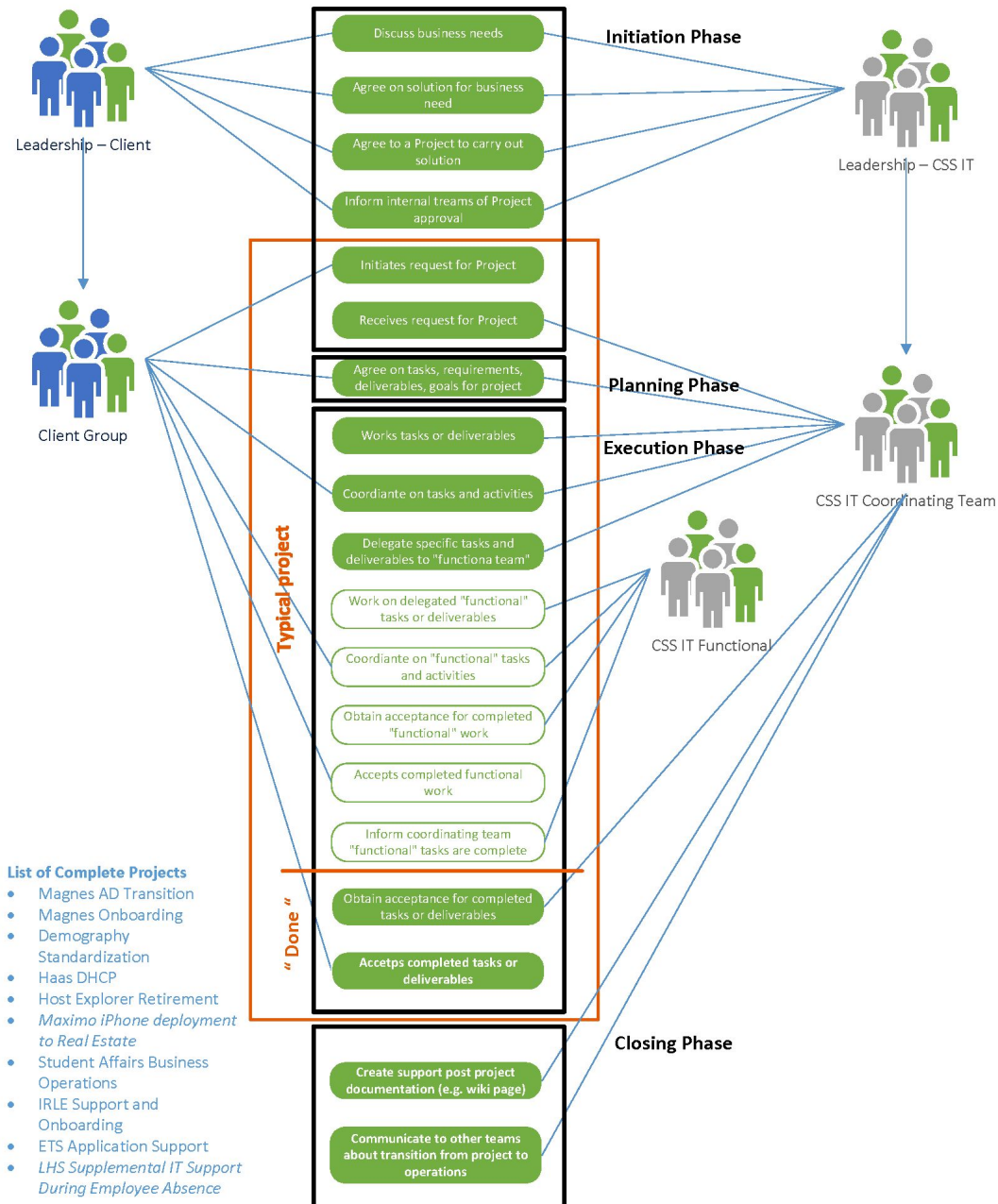


Agile Scrum for Project Portfolio Management

(non-software development use)

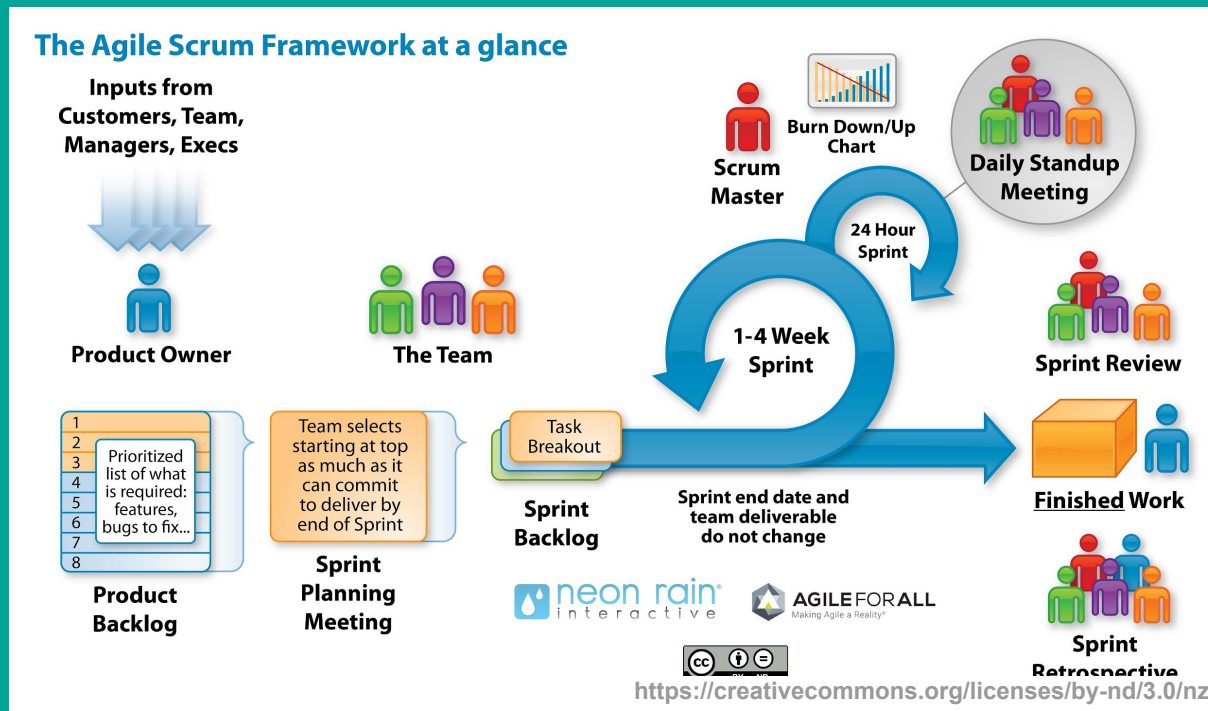
Never ending projects WHY?

CSS IT Project Life Cycle



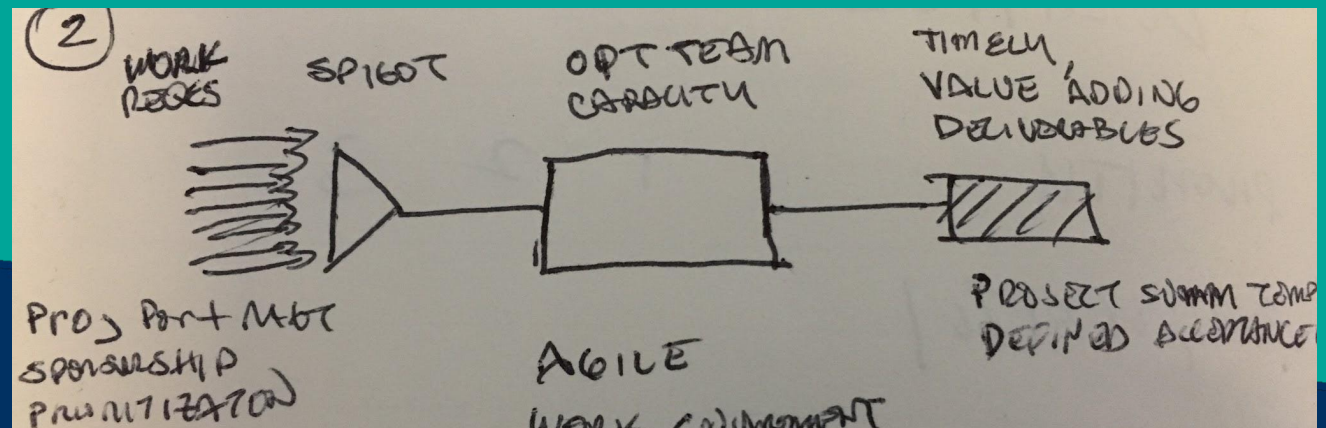
Project Portfolio Management

The Agile Scrum Framework at a glance



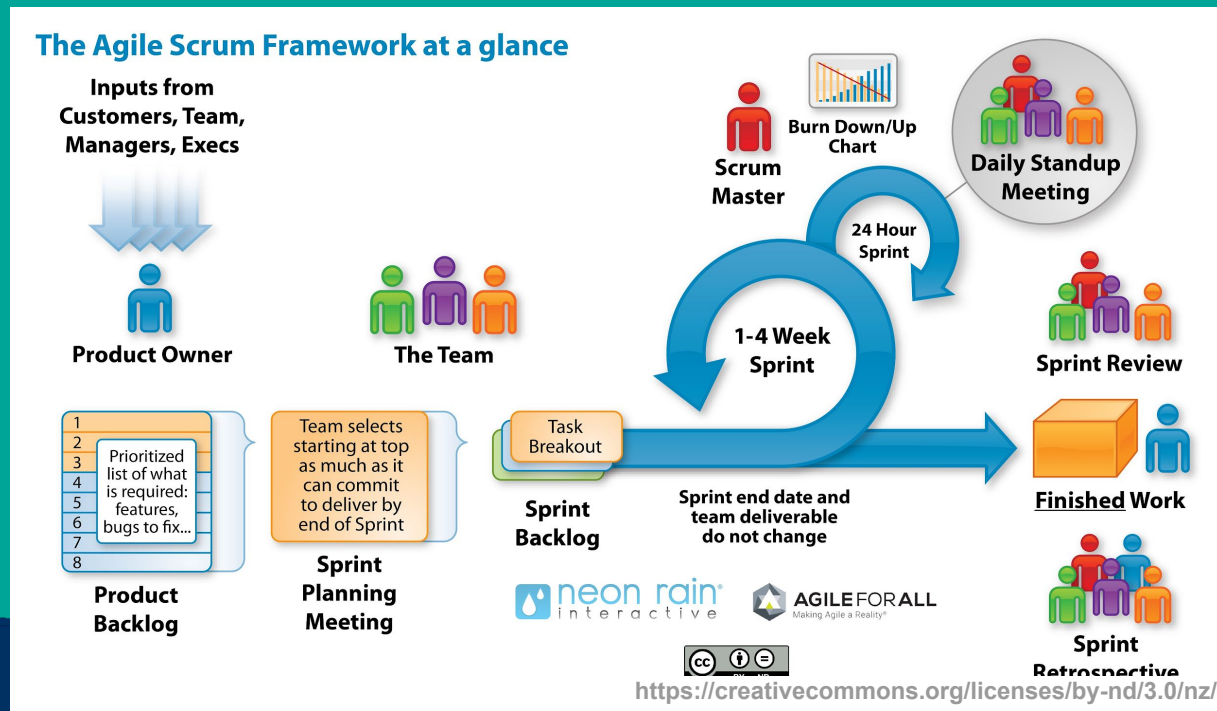
1 - Establish framework for project activities

2 - Manage Resources and Prioritize Projects



Scrum Team

- June 2017 - April 2018
- Started portfolio with 25~ projects down to 3~8 for the team
- 7 Sprint Review Sessions (totalling over 10+ mtg hours with sponsors)
- 3 IT Business Analysts
- Average Sprint is 3 weeks
- Track effort by project not individual



Igt

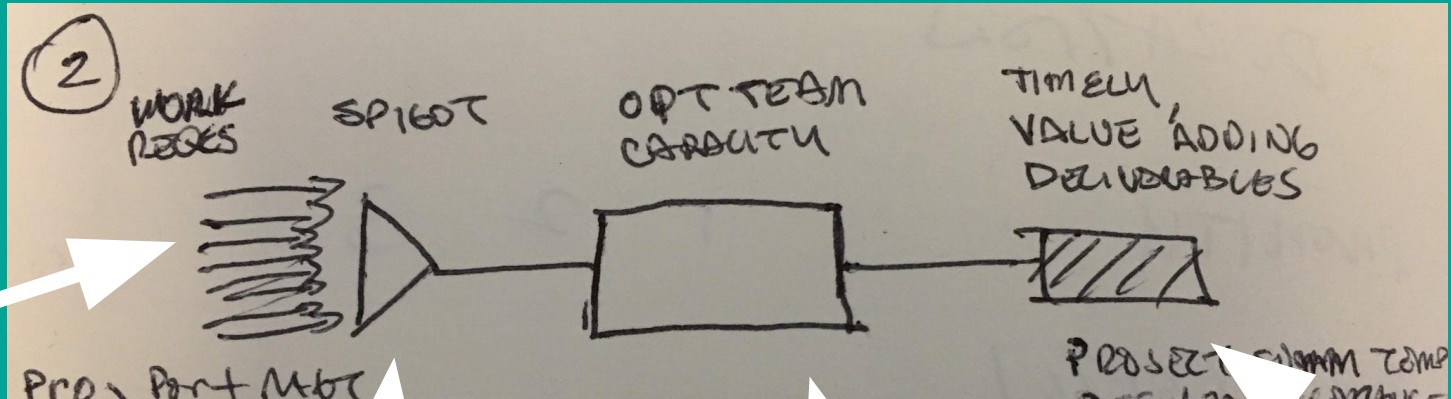
Lead/POC	Sponsor
Jonathon Kogelman	Michelle Bautista
Jonathon Kogelman	Michelle Bautista
Jonathon Kogelman	Michelle Bautista
Joleen Locanas	Michelle Bautista
Joleen Locanas	Michelle Bautista
Joleen Locanas	N/A



Artifacts: Sprint Backlog

9/18-10/18 Sprint		360			
Max Available Hours		319.5	89%	Target 80% - 90%	
Estimated Total Hours of Work		156.5	43%	Target 65% - 80%	
Actual Total Hours of Work		70	19%	Target 65% - 80%	
End of Sprint Task Completion Rate		47.73%		Target 80% - 90%	
ID	Task Name	Estimated Hours	All Actual Hours Worked	Primary Assignee	End of Sprint Status
12	All Hands (Oct 2017)	3.5	2.25	Michael Thompson	
12.01	Create Toolkit	1	-	Michael Thompson	Incomplete ▾
12.02	Handoff to Committee	0	-	Michael Thompson	Incomplete ▾
12.03	Checkin w Committee; solicit feedback	1	-	Michael Thompson	Incomplete ▾
12.04	Secure venue & Invite Staff	1	-	Michael Thompson	Complete ▾
12.05	Meet w Deputy to finalize roles and Project Team Conclusion		-		Incomplete ▾
12.06	Retro event and Add followup tasks to next Scrum	0.5	-		
17	Bluejeans Sunset Communications	18	5.5	Candy Skinner	
17.1	Create Change Management Documentation	4	-	Candy Skinner	Complete ▾
17.2	Create Communication Schedule to Announce Bluejeans Sunset to End Users	1	-	Candy Skinner	Complete ▾
17.3	Checkin with BlueJeans Team	1	-	Candy Skinner	Complete ▾
17.4	Create BlueJeans User Activity Metrics (Jan - Aug 2017)	4	-	Candy Skinner	Complete ▾
17.5	Identify top 100 Bluejean Users to accommodate in the Transition to new video Co	4	-	Candy Skinner	Complete ▾
17.6	Create Spreadsheet to list frequent Bluejeans user host meetings with greater than	4	-	Candy Skinner	Complete ▾
17.7			-		▾
18	Effort Tracking for PDLC environment	16	10.5	Joleen Locanas	
18.1	Draft Tracking Sheet/integrate with Sprint Backlog	1	-	Joleen Locanas	Complete ▾
18.2	Create Instructions for individual users	2	-	Joleen Locanas	Complete ▾
18.3	Update 9/18-10/8 sprint backlog with new formulas based on user feedback	4	-	Joleen Locanas	Complete ▾

Using a Pull System



Intake

- Criteria
- Process if “project” doesn’t meet criteria
- Submission channels

Spigot

- Sponsorship
- Prioritization based on alignment with unit goals
- Kick off / sign off on project and assign to team

Portfolio Management

- Project / Epic Archive
- Feedback Loop (CSI & Data)

Capacity / Resource Management

- Agile
- “Effort /Capacity Tracking”



Thank You!

Joleen Locanas
jlocanas@berkeley.edu