

DAY 1

Intro, Overview of the Problem–Solution, Forming the Team with Exercise and Pitfalls to Avoid

Time 12:30 PM EST to 5:00 PM EST
Break 45 minutes between 2:30 PM EST to 3:15 PM

Welcome and Introduction

The attendees introduce themselves describe a current SLA challenge they are facing or have faced that they would like addressed during the class. The instructors introduce themselves and provide a brief narrative of their background and experience.

Individual Baseline Exercise – the attendees, working as individuals, analyze a short SLA case study to focus their attention on components of Service Levels.

Overview of i) the problem, ii) the solution, iii) the benefits

In this section, we are formally introduced to some of the contextual problems giving rise to the need for the existence and use of Services Levels in many of our contracts. An overview of the solution is outlined, and the potential benefits of the solution are discussed. The class is introduced to a 10-step process for best-practice creation and management of Service Levels.

Process step 1: Form Team

Here the class investigates the critical importance of internal alignment among stakeholders for successful SLAs, especially in the steps for selecting, designing, and writing the SLAs, in designing the management of SLAs, in negotiating them, and in implementing and managing their ongoing use.

Process step 2: Identify potential Service Levels

In this section, the class considers how an organization can successfully select the appropriate areas for Service Levels from potential candidates by seeking input from internal customers, from research, and other approaches. Pain points, history, and other possibilities are covered.

Process step 3: Develop Service Levels

The “art and science” of the creation of Service Levels are investigated by the class. The components necessary to every successful Service Level are discussed.

Exercise: Class has hands on experience analyzing some less-than-perfect service levels, identifying potential deficiencies.

In this section we go through a step-by-step process of how to write a meaningful Service Level that can be understood, implemented, and enforced, including such elements as Service Level Objectives, tolerances, data sources, measuring, reporting, and the like.

Exercise: Class, in teams, write service levels to practice and better learn specific principles and process taught.

Pitfalls to avoid

In this section, the class covers the content of a variety of potential pitfalls that can creep into the design of Service Levels, and how such pitfalls can be avoided.

DAY 2

Designing SLAs, When They Don't Work, Explore the Success Factors, Design Service Level Management and Gaining Management Approval

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Process step 4: Design Service Level incentives

Here is covered the important topic of why remedies or incentives (negative and positive) are necessary for the effective functioning of Service Levels, what are the possible incentives that can be used to designing and writing Service Levels, and what is the most effective way to design and structure a Service Level incentive.

Exercise: Class is exposed to, discusses, and has an exercise helping to understand what the difference is between financial and non-financial remedies, and when the use of each type of remedy might be applicable.

When Service Levels don't work & success factors

In this section, consideration is given to circumstances where Services Levels might not work or not function well enough to justify expenditure of the time and resources needed for their creation. We focus on what the real "success factors" are in creating and using incentives or remedies with Service Levels.

Exercise: The class will break up into teams and practice writing Service Level incentives based on the principles and processes taught and learned, including financial vs non-financial, layering of Service Levels, and the like

Process step 5: Design Service Level management

Here the class confronts the difficult challenge that some of the Service Levels created, designed, documented, and included in a written contract are, after the signing of the contract, sometimes not even implement, managed, or enforced. We examine reasons why, how designing actual post-signing management of the Service Levels can help address the problem, and how that designing step should be conducted.

Exercise: A potentially powerful tool to be used in designing Service Level Management is the RACI chart. Here the class exams a sample RACI charge and how it might be used in designing Service Level Management.

Process step 6: Gain management approval

We address one of the weakest links in successful creation, management and enforcement of Service Levels, the failure to get executive management involvement, buy-in, and approval. In addition to understanding the why, the class reviews the how, the potential ways to involve and get buy-in from executive management.

Exercise: A potentially power tool in getting both Executive Management buy-in and buy-in from other Stakeholders is the use of a Position Paper. The class examines a sample position paper and reviews how it might be used.

DAY 3

Develop Contract-RFP, Harmful Words in SLAs, Implementation and More

Time 12:30 PM EST to 5:00 PM EST
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Process step 7: Develop contract/ develop RFP

In this section we consider how Service Levels can be worked into a contracting landscape, including what goes into a master agreement, a category document, statement of work, and various exhibits.

Exercise: We review a best-practice approach to adding Service Levels to contract documents by reviewing an actual template and wording.

Words “harmful” to customers in Service Level agreements

Some words used in Service Levels can adversely affect their enforceability and greatly impair their benefit to the customer. We cover what type of words are dangerous, why, and how customers should be careful to identify and revise them.

Exercise: The class, working in pairs, reviews an SLA template that contains various dangerous words in order to help practice locating, removing and revising such words.

In this section we delve into why and how Service Levels should be introduced into an RFP document. Some of the pitfalls that can arise in RFPs involving Service Levels are discussed and solutions offered.

Process step 8: Negotiate Service Levels

In this section we examine why it is necessary to negotiate Service Levels, how negotiating Service Levels differs from and is the same as negotiating other terms of a deal, what ploys are used by vendors in negotiating Service Levels and how to counteract them, and what are the keys to success in negotiating Service Levels.

Exercise: As a group and also in pairs, we do an exercise on recognizing and countering negotiation ploys.

Process step 9: Implement Service Levels

Here the class examines why it is often necessary to have a ramp up period after the contract is signed and the Service Levels go into effect. We walk through a ramp up approach to understand what must happen and how.

Process step 10: Monitor, Manage and Improve

In this section we consider approaches and tools to monitor and manage Service Levels after the contract is signed, including such items as scorecards, dashboards, RACI charts, and the like. Emphasis is placed continuous improvement.

Conclusions and Summary

After reviewing the SLA templates that come with the course, we review with the students their specific goals, and close out the session with a summary checklist of important SLA items that should not be forgotten going forward.