



TM

ITIL®

**PROFESSIONAL
QUALIFICATION SCHEME**

INTERMEDIATE QUALIFICATION

SERVICE CAPABILITY

SERVICE OFFERINGS AND AGREEMENTS CERTIFICATE

QUALIFICATION SYLLABUS



APM Group-The Accreditor

Official Accreditor of the OGC ITIL® Portfolio

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THE ITIL INTERMEDIATE QUALIFICATION: SERVICE OFFERINGS AND AGREEMENTS CERTIFICATE

The ITIL Intermediate Qualification: Service Offerings and Agreements (SOA) Certificate is a free-standing qualification, but is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert in IT Service Management Certificate. The purpose of this training module and the associated exam and certificate is, respectively, to impart, test, and validate the knowledge on industry practices in Service Management as documented in the ITIL Service Lifecycle core publications.

The ITIL Certificate in Service Offerings and Agreements is intended to enable the holders of the certificate to apply the practices during the Service Management Lifecycle. The main processes and activities that are encompassed by SOA practices are:

- Service Portfolio Management
- Service Level Management
- Service Catalogue Management
- Demand Management
- Supplier Management
- Financial and Business Relationship Management.

This course also introduces and explores the implementation of SOA practices and technology considerations.

Target Candidate

The target group of the ITIL Certificate in Service Offerings and Agreements is:

- IT Professionals
- Business Managers
- Business Process Owners
- Individuals who have attained the V3 ITIL Foundation certificate in Service Management, or the V3 Foundation Bridge certificate and who wish to advance to higher level ITIL certifications.
- Individuals who require a deep understanding of ITIL Certificate in the Service Offerings and Agreement processes and how it may be used to enhance the quality of IT service support within an organisation
- IT professionals that are working within an organisation that has adopted and adapted ITIL who need to be informed about and thereafter contribute to an ongoing service improvement programme
- Operational staff involved in Service Portfolio Management; Service Level Management; Service Catalogue Management; Demand Management; Supplier Management; Financial Management and Business Relationship Management who wish to enhance their role-based capabilities

Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

It is recommended that candidates:

- Can demonstrate familiarity with IT terminology and understand the context of Service Offerings and Agreements management of their own business environment is strongly recommended
- Have exposure working in the service management capacity within a service provider environment, with responsibility emphasizing on at least one of the following management processes and activities:

- Service Portfolio Management
- Service Catalogue Management
- Service Level Management
- Demand Management
- Supplier Management
- Financial Management
- Business Relationship Management

It is also strongly recommended that candidates read the ITIL Service Lifecycle core publications in advance of attending training for the certification, and in particular the Service Strategy and Service Design publications.

Eligibility for Examination

To be eligible for the examination leading to an accredited ITIL Certificate in Service Offerings and Agreements, the candidate shall fulfil the following requirements:

- At least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organization (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- There is no minimum mandatory requirement but 2 to 4 years professional experience working in IT Service Management is highly desirable
- Hold the ITIL V3 Foundation Certificate in IT Service Management or ITIL V2 Foundation plus the bridging certificate
- It is also recommended that candidates should complete at a minimum 12 hours of personal study by reviewing the syllabus and the pertinent areas of the ITIL Service Management Practice core guidance publications and in particular, the Service Strategy and Service Design publications

Syllabus at a Glance:

Learning Unit SOA01: Introduction to Service Offerings and Agreements

Bloom's Level 2 Objectives – Full understanding of Service Offerings and Agreements (SOA) terms and core concepts

- Service Management as a practice
- How it delivers value to customers and the business
- The underpinning processes and functions that support the Service Lifecycle
- Which stages of the Service Lifecycle contribute to Service Offerings and Agreements and how they all interact

Learning Unit SOA02: Service Portfolio Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Service Portfolio Management inclusive of its design strategy, components, methods, activities, roles and operation including its organizational structure and the interfaces with other processes
- Service Portfolio Management in relationship to the Service Catalogue and Service Pipeline and how these support SOA
- The benefits and business value from Service Portfolio Management

Learning Unit SOA03: Service Catalogue Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Service Catalogue Management inclusive of its design strategy, components, activities, roles and operation including its organizational structure and the interfaces with other processes
- Service Catalogue in relationship to the Service Portfolio, the Business Catalogue, the Technical Service Catalogue and how these components are used to ensure quality service within SOA
- Metrics and Critical Success Factors (CSFs) associated with Service Catalogue Management in support of SOA

Learning Unit SOA04: Service Level Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Service Level Management (SLM) inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- SLM components and activities including Service Level Agreements (SLAs) structures, Service Level Requirements (SLRs), Operational Level Agreements (OLAs), Critical Success Factors (CSFs), Underpinning Contracts (UCs) their metrics, performance and monitoring
- How these components are used to ensure quality service within SOA
- The benefits and business value of SLM

Learning Unit SOA05: Demand Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Demand Management process inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Demand especially as it relates to business activity patterns and how it is used within SOA
- Service Portfolio interaction with Demand Management and how demand can be managed for service in relation to providing Business benefits and in support of SOA

Learning Unit SOA06: Supplier Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Supplier Management process inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Supplier Management components and activities (e.g. Supplier Categorization, Supplier Evaluation, Supplier and Contract Database, metrics, etc.) and how these are used to ensure quality service within SOA
- The benefits and business value that can be gained from Supplier Management as related to SOA

Learning Unit SOA07: Financial Management

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Financial Management inclusive of design strategy, components, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Financial Management components and activities including funding, accounting, chargeback, Return on Investment and how these are used to ensure quality service within SOA
- The benefits and business value that can be gained from Financial Management

Learning Unit SOA08: Business Relationship Manager

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- The Business Relationship Manager roles and responsibilities, and how they support SOA
- Business Relationship Manager activities and how these are used to ensure quality service within SOA

Learning Unit SOA09: Service Offerings and Agreement Roles and Responsibilities

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- The roles and responsibilities related to Service Catalogue Manager, Service Level Manager and the Supplier Manager and how they fit within the Service Design organization to support SOA

Learning Unit SOA10: Technology and Implementation Considerations

Bloom's Level 4 Objectives – Support problem solving by putting theory into practice, interpret principles and relationships

- Service Management tools and where/how they would be used within SOA for process implementation
- The tools that support SOA
- Challenges and Risks when implementing SOA practices and processes

Qualification Learning Objectives

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Service Management as a Practice
- Processes across the Service Lifecycle pertaining to the Service Offerings and Agreements curriculum:
 - Service Portfolio Management which provides documentation for services and prospective services in business terms
 - Service Catalogue Management which is concerned with the production and documentation of the Service Catalogue from a business and a technical viewpoint
 - Service Level Management which sets up a Service Level Agreement (SLA) structure and ensures that all SLAs have an underpinning support structure in place
 - Demand Management which identifies Patterns of Business Activity to enable the appropriate strategy to be implemented
 - Supplier Management which ensures all partners and suppliers are managed in the appropriate way and includes contract management
 - Financial Management which includes ensuring understanding of the service value and the management of all financial considerations
 - Business Relationship Managers who have responsibility to represent customers and ensure the Service Catalogue and Portfolio have the right needs
- Operational activities of processes covered in other Lifecycle phases such as Incident and Change Management
- Organizing for Service Operation which describe functions to be performed within Service Offerings and Agreements
- Service Offerings and Agreements roles and responsibilities
- Technology and Implementation Considerations
- Challenges, Critical Success Factors and risks
- CSI as a consequence of effective Service Offerings and Agreements

Level of Difficulty

All ITIL Service Management qualifications use the Bloom's taxonomy in both the construction of the learning units and in the examination which is based on this syllabus.

A learning taxonomy is a scale of the degree of difficulty in the learning process. These levels apply to the cognitive, affective and psychomotor domains of learning but in the ITIL Qualification Scheme, we deal only with the cognitive sphere.

Bloom defines six levels of learning in the COGNITIVE domain which are both sequential and cumulative. They move from the simple to the complex. This implies that in order to achieve the sixth level of learning, for example, the instructor must ensure that the previous five levels have been mastered.

Level 1 - The KNOWING level: The candidate is able to bring to mind or remember the appropriate material. The examination questions associated with this level tax the candidate's memory and include such tasks as defining, recalling, listing, recognizing, describing and naming.

Level 2 - The COMPREHENDING stage: The candidate is able to understand or grasp the meaning of what is being communicated and make use of the idea without relating it to other ideas or materials and without seeing the fullest possible meaning or translation of the idea. Examination questions at this level would include scenarios giving examples of, illustrating, inferring, summarizing and interpreting. These actions involve the knowing which has taken place at the first level.

Level 3 - The APPLYING level: The candidate should be able to use ideas, principles and theories in new, particular and concrete situations. Examination questions at this level involve both knowing and comprehension and might include choosing appropriate procedures, applying principles, using an approach or identifying the selection of options.

Level 4 - The ANALYZING level: The candidate is able to break down a communication (rendered in any form) into constituent parts in order to make the organization and significance of the whole clear. Breaking down, discriminating, diagramming, detecting, differentiating and illustrating are important tasks at this level and can be seen to include the previous levels of knowing, comprehending and applying. Here the significance of the constituent parts of an entity are examined in order to understand the whole more fully.

Level 5 - The SYNTHESIS level: At this level the candidate is able to put back together again the various parts or elements of a concept into a unified organization or whole. This putting together again and making sense of small parts is a crucial factor in intelligence and learning. Examination questions at this level would include scenarios involving creating, writing, designing, combining, composing, organizing, revising and planning. This level of learning in order to occur must include the first four levels – knowing, comprehending, analyzing and applying. This level of learning is probably the most intense and exciting for the candidate.

Level 6 - The EVALUATING phase: In this phase the candidate is able to arrive at an overview and to judge the value and relative merit of ideas or procedures by using appropriate criteria. At this level of learning the candidate will be able to compare, judge, appraise, justify, criticize and contrast theories, procedures, methods and concepts. This level involves mastery of the five previous levels of knowing, comprehending, applying analyzing and synthesizing.

For the purposes of the ITIL Qualifications Scheme, the Blooms level will appear in each syllabus module to identify the highest level of cognitive difficulty that course content should deliver to meet the learning outcome and competence to meet the examination level of difficulty.

The following table illustrates the use of the taxonomy in ITIL professional qualifications.

Bloom Levels and taxonomy	Used by ITIL certification	Intellectual activity in learning outcome and exam proficiency
1. Knowing 2. Comprehending	ITIL Service Management Foundation Level stream (includes V2 – V3 Foundation Bridge certification	The ability to recall, recite, name, and understand the meaning of ITIL terminology and basic practice fundamentals. <i>Vernacular examples used in Syllabus:</i> Understand; Describe; Identify
3. Applying 4. Analyzing	ITIL Service Management Lifecycle Stream Capability Stream Managing Across the Lifecycle	The ability to use the practices and concepts in a situation or unprompted use of an abstraction. Can apply what is learned in the classroom, in workplace situations. Can separate concepts into component parts to understand structure and can distinguish between facts and inferences. <i>Vernacular examples used in Syllabus:</i> Analyze; Demonstrate; Apply; Distinguish; Justify; Produce; Decide
5. Synthesis 6. Evaluate	ITIL Service Management Managing Across the Lifecycle – level 5 only ITIL Service Management Professional – Advanced Series	The ability to create patterns or structure from composite elements to achieve a new meaning or outcome. Can make judgement, weigh options of ideas and elements to justify and support an argument or case. <i>Vernacular examples used in Syllabus:</i> Evaluate; Justify; Summarize; Plan; Modify; Manage; Control

Intermediate stream qualifications will examine according to the Bloom level assigned to each syllabus learning unit within each of the Service Lifecycle and Service Capability streams. This means that a candidate must be prepared to be tested up to and including that level for any question related to that learning unit or units.

The examination format of complex multiple choice will offer a scenario and questions with a corresponding series of possible answers. Each is constructed to test a candidate's competency up to and including the bloom level associated to the syllabus learning unit that the question is mapped to. Instructors should ensure that the module curriculum offers discussion, practical exercises and instruction that will ensure the candidate's competence needed to meet the exam level of difficulty.

The intermediate modules are expected to provide a practical level of proficiency for a candidate to be able to utilize the knowledge learned in their work environment. The examinations test a level of proficiency that allows candidates to apply the knowledge learned in the course to correctly select the correct sequence of possible answers.

Service Offerings and Agreements Syllabus

The ITIL Intermediate Qualification: Service Offerings and Agreements is awarded to those who complete the following ten units of study and successfully pass the relevant examination.

Core guidance references with publication reference (SS- Service Strategy, SD – Service Design, ST – Service Transition, SO – Service Operation, CSI – Continual Service Improvement) and section numbers are included along with indicative contact study hours.

The contact hours are shown in each learning unit and are suggested to provide adequate time to cover the core guidance content however, Accredited Training Organizations (ATOs) are encouraged to combine or reorder the learning units in any way that suits the flow of their courseware content delivery. All ATO's must ensure however, the minimum contact hours for Eligibility for examination are met.

Section numbers are indicated as “chapter . section . subsection” (X.X.X). Unless otherwise indicated instructional coverage of the content of the entire section referenced is assumed.

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA01 Introduction</p>	<p>This learning unit of this course provides an introduction to the Core Concepts and terminology of the Service Lifecycle, and the role that SOA plays within the Lifecycle. A complete overview of Service Management is presented along with defining Service as a value proposition, the difference between functions and processes as well as how to create business value. The processes within SOA practices and how these processes support the Service Lifecycle, inclusive of their roles and responsibilities are identified in the lifecycle phases of Service Strategy and Service Design. The Bloom's learning level for this unit of study is level 2: Full understanding of SOA terms and core concepts.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand and describe:</p> <ul style="list-style-type: none"> • The concept of Service Management as a practice Core Guidance References - SS 2.1, SD 2.1 • The concept of Service, its value proposition and composition Core Guidance References - SS 2.2, SD 2.2 • The functions and processes across the Lifecycle Core Guidance References - SS 2.6, ST 2.3 • The role of processes in the Service Lifecycle Core Guidance References - SS 2.6.2, SS 2.6.3 • How Service Management creates business value Core Guidance References - SS 3.1, SD 2.4.3, ST 2.4.3, SO 2.4.3, CSI 3.7.2 • How the processes within the Service Offerings and Agreement curriculum supports the Service Lifecycle Core Guidance References - SD 2.4.5, SS 5.1 - 5.1.2, SS 5.5.1, SS 5.3 (<i>up to 5.3.1</i>) 	<p>Up to Bloom level 2</p> <p>Knowing and Comprehending</p> <p>The ability to recall, recite, name and understand the meaning of ITIL terminology and basic practice fundamentals.</p>
	<p>Contact hours recommended – 1.5</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: SOA02 Service Portfolio Management	<p>This learning unit addresses how the process of Service Portfolio Management contributes to SOA practices. A complete overview of the objectives, scope and importance of Service Portfolio Management along with how it relates business services to IT services. Service Portfolio Management policies, principles, concepts, activities, methods and techniques are explained in relationship to SOA practices. The relationship of Service Portfolio Management to the Service Catalogue and Service Pipeline is described and illustrated. Efficient use of Service Portfolio Management metrics are reviewed in this unit.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The Service Portfolio and illustrate its relationship with the Service Catalogue and Service Pipeline Core Guidance References - SS 4.2.3; SS 5.1.2.3 • How a Service Portfolio describes a provider's service and how it relates the business service with the IT service. Core Guidance References - SS 5.3 • The Service Portfolio Management methods Core Guidance References - SS 5.4 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Service Portfolio Management.</p>
	<p>Contact hours recommended – 2.5</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA03 Service Catalogue Management</p>	<p>This learning unit explores how the process of Service Catalogue Management contributes to SOA practices. A complete overview of the objectives, scope and importance of Service Catalogue Management as an interface to the Service Portfolio is covered as well as the difference between a Business and a Technical Service Catalogue. Service Catalogue Management policies, principles, concepts, activities, methods and techniques are explored in relation to SOA. Efficient use of Service Catalogue Management metrics are reviewed in this unit.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The purpose, goal and objectives of the process Core Guidance References - SD 4.1.1 • The scope of the process Core Guidance References - SD 4.1.2 • The interface to the Service Portfolio Core Guidance References - SS 4.2.3; SD 3.6.2; SD 3.9; SD 3.10 • The difference between a Business and a Technical Service Catalogue Core Guidance References - SD 4.1.4 • The importance of the Service Catalogue to the Service Lifecycle and the business Core Guidance References - SS 4.2.3; SD 3.10; SD 4.1.3 • Policies, principles and basic concepts Core Guidance References - SD 4.1.4 • Key metrics, challenges, critical success factors and risks associated with the process Core Guidance References - SD 4.1.8; SD 4.1.9 • The process including the utilisation of the Service Catalogue by other processes and functions Core Guidance References - SD 4.1.5; SD 4.1.6 • Production of a Service Catalogue Core Guidance References - SD Appendix G 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Service Catalogue Management.</p>
	<p>Contact hours recommended – 3.0</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA04 Service Level Management</p>	<p>This learning unit introduces the Service Level Management process and how it contributes to SOA. A complete overview of the objectives, scope and the importance of IT Service Level Management as a process to generate business value are explored. IT Service Level Management policies, principles, concepts, activities, methods and techniques are explained in relationship to SOA practices, including SLA structures and determining Service Level Requirements. Efficient use of SLM metrics are reviewed in this unit along with monitoring of service performance against SLAs (as well as OLAs).</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The purpose, goal, objectives and scope of SLM Core Guidance References - SD 4.2.1, 4.2.2 • The importance of the process to the Service Lifecycle and how it generates business value Core Guidance References - SD 4.2 up to 4.2.1, 4.2.3 • The principles and basic concepts Core Guidance References – SD 4.2.4 • The main activities, methods and techniques of this process and how it relates to the Service Lifecycle. This includes the SLA structures and determining Service Level Requirements Core Guidance References - SD 4.2.5 (up to 4.2.5.3), SD Fig 4.5, SD Fig 4.6, SD Fig 4.7 • The process deliverables Core Guidance References - SD 4.2.5.6, 4.2.5.7 • Monitoring of service performance against SLAs Core Guidance References – SD 4.2.5.3, CSI 3.5 • The use of key metrics, challenges, critical success factors and risks associated with the process Core Guidance References - SD 4.2.7, 4.2.8, 4.2.9 • The contents of SLAs, OLAs and review meetings Core Guidance References - SD 4.2.5.5, 4.2.5.8, SD Appendix F • The interfaces to other processes and functions Core Guidance References – SD 4.2.5 (up to 4.2.5.1), SD Fig 4.5, 4.2.5.4, 4.2.5.8, 4.2.5.9, 4.2.6 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Service Level Management.</p>
	<p>Contact hours recommended – 8.0</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA05 Demand Management</p>	<p>This learning unit covers how the Demand Management process contributes to SOA practices. The objectives, scope and importance of activity-based Demand Management as a process to generate business activity patterns are explored. Demand Management policies, principles, concepts, activities, methods and techniques are explained in relationship to SOA practices. Efficient uses of the interfaces to Service Portfolio as well as managing demand for Service are reviewed in this unit.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The basic concepts of the process Core Guidance References - SS 5.5.1 • Activity-based Demand Management and business activity patterns Core Guidance References - SS 5.5.2, 5.5.3, SS Fig 5.23 • The interfaces to Service Portfolio Core Guidance References - SS 5.5.2 • Managing demand for Service Core Guidance References - SS 5.5.3, SS Table 5.8, SS Table 5.9 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Demand Management.</p>
	<p>Contact hours recommended – 2.5</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA06 Supplier Management</p>	<p>This learning unit covers how the Supplier Management process contributes to SOA practices. The objectives, scope and importance of Supplier Management as a process to generate business value are explored. Supplier Management policies, principles, concepts, activities, methods and techniques are covered in relationship to SOA practices as well as how these relate to the Service Lifecycle. The evaluation of new suppliers, the use of Supplier Categorization and maintenance of the Supplier and Contract Database. Efficient use supplier related measures and metrics are reviewed in this unit.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The purpose, goal and objectives of the process Core Guidance References - SD 4.7.1 • The scope of the process Core Guidance References - SD 4.7.2 • The importance of the process to the Service Lifecycle and how they generate business value Core Guidance References - SD 4.7.3 • The principles and basic concepts Core Guidance References - SD 4.7.4 • The main activities, methods and techniques of this process and how it relates to the Service Lifecycle including evaluation of new suppliers Core Guidance References - SD 4.7.5 (up to SD 4.7.5.2), 4.7.5.3, 4.7.5.4, 4.7.5.5 • The use of Supplier Categorization and maintenance of the Supplier and Contract Database Core Guidance References - SD 4.7.5.2 • The use of key metrics, challenges, Critical Success Factors and risks associated with the process Core Guidance References - SD 4.7.7, 4.7.9 • The inputs and outputs of the process Core Guidance References – SD 4.7.6 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Supplier Management.</p>
	<p>Contact hours recommended – 3.0</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA07 Financial Management</p>	<p>This learning unit looks at Financial Management and how it contributes to SOA. An overview of the objectives, scope and importance of Financial Management as a process to generate business value are explored. Financial Management policies, Service Valuation, principles, concepts like funding, accounting, ROI, chargeback and creating a business case are covered, along with the activities, methods and techniques in relationship to SOA practices. Efficient use of Financial Management metrics are reviewed in this unit as well as their design and implementation.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The purpose, goal and objectives of the process Core Guidance References - SS 5.1 (<i>up to 5.1.2</i>) • The scope of the process Core Guidance References - SS 5.1.2 (<i>up to SS 5.1.2.1</i>) • The concepts of Service Valuation Core Guidance References - SS 5.1.2.1, 5.1.3.1, SS Fig 5.3 • The importance of the process to the Service Lifecycle and how they generate business value Core Guidance References - SS 5.1 (<i>Introductory paragraph</i>), 5.1.1 • The various aspects of the process and the basic concepts of funding, accounting and chargeback Core Guidance References - SS 5.1.2.5, 5.1.2.6, 5.1.2.7, 5.1.4.2 • Return on Investment and the business case Core Guidance References - SS 5.2 (<i>up to 5.2.2.1</i>), 5.2.3 (<i>up to SS 5.2.3.1</i>) • The main activities, methods and techniques that enable this processes and how it relates to the Service Lifecycle Core Guidance References - SS 5.1.3 • Design and Implement a Financial Management process Core Guidance References - SS 5.1.4.3 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to Financial Management.</p>
	<p>Contact hours recommended – 5.5</p>	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: SOA08 Business Relationship Manager	<p>This learning unit deals with role of the Business Relationship Manager and how this role contributes to SOA practices. The key role, function and responsibilities of the Business Relationship Manager are defined and discussed.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The role of Business Relationship Managers Core Guidance References - SS 4.1.3; 5.5.4.5 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to this role.</p>
	Contact hours recommended – 1.0	
ITIL SC: SOA09 Service Offerings and Agreement Roles and Responsibilities	<p>This learning unit deals with the roles and responsibilities which contribute to SOA practices. Three key focus areas in SOA practices (i.e. Service Level Management, Service Catalogue Management and Supplier Management) are defined and discussed in relation to the key roles / functions that are responsible for executing each process.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • Key roles and responsibilities of the Service Catalogue Manager Core Guidance References - SD 6.4.5 • Key roles and responsibilities of the Service Level Manager Core Guidance References - SD 6.4.6 • Key roles and responsibilities pertaining to the Supplier Manager Core Guidance References - SD 6.4.11 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to SOA roles.</p>
	Contact hours recommended – 1.0	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
<p>ITIL SC: SOA10 Technology and Implementation Considerations</p>	<p>This learning unit deals with SOA technology and implementation considerations. Service Design is specifically used to identify good practices and evaluation criteria for technology and tools related to process implementation. Service Operations provides the specifics on planning and implementing Service Management technology support as well as a guide to generic requirements for technology. All three lifecycle phases (i.e. Service Design, Service Operation and Service Transition) are used to explore the challenges, Critical Success Factors and risks related to implementing practices and processes.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> • The generic requirements for technology to assist Service Design Core Guidance References - SD 7.1 • The evaluation criteria for technology and tooling for process implementation Core Guidance References - SD 7.2 • The good practices for practice and process implementation Core Guidance References - SD 8.2, 8.3, 8.4 • The challenges, Critical Success Factors and risks related to implementing practices and processes Core Guidance References - ST 9.1-9.3, SO 9.1-9.3, SD 9.1-9.2 • How to plan and implement Service Management technologies Core Guidance References - SO 8.5 	<p>Up to Bloom level 4</p> <p>Applying and Analyzing</p> <p>The candidate should reach a level of competence that supports problem solving, putting theory into practice, interpreting principles and relationships related to technology and implementation.</p>
	Contact hours recommended – 2.0	
<p>ITIL SC: SOA11</p>	<p>Summary, Exam Preparation and Directed Studies</p> <p>This unit summarises the material covered in the previous units and prepares candidates for the examination. It is likely that most course providers will wish to offer, and review, at least one mock examination opportunity.</p>	
	Contact hours recommended – 2.0	

Lecture and exercises

Meeting the learning objectives of this syllabus can be assisted through the use of practical exercises during the delivery of an accredited course. It is recommended that course providers make use of exercises to enhance the reinforcement of the learning objectives in this syllabus. To aid course providers, there are areas within each learning unit whose learning objective include such phrases as “illustrate, discuss, use examples”, etc, which may be considered as opportunities to introduce practical course exercises. These are not mandated areas for practical exercises, but provided as suggestions for use by course providers.

Format of the Examination

Type	Eight (8) multiple choice, scenario-based, gradient scored questions. Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.
Duration	Maximum 90 minutes for all candidates in their respective language.
Provisions for additional time relating to language	Candidates completing an exam: <ul style="list-style-type: none"> In a language that is not their mother tongue, and in a country where the language of the exam is not a business language in the country, have a maximum of 120 minutes to complete the exam and are allowed the use of a dictionary
Prerequisite	ITIL V3 Foundation Certificate or ITIL V2 Foundation plus Bridge Certificate and completion of an accredited Course from an ITIL Accredited Training Provider
Supervised	Yes
Open Book	No
Pass Score	28/40 or 70%

Criteria of Training Competence

This syllabus can only be delivered to target groups by an accredited provider / trainer. Any provider/trainer must hold the following qualifications to be eligible to provide this syllabus:

Criteria	Eligibility	Degree of proficiency validation
Accredited Training Organization	Required	The company shall be registered and in good standing with the Official Accreditor
ITIL Service Offerings and Agreements Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute
ITIL V3 Expert Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute

Approved Delivery Structure

Structure	Operational Standard Requirements
Training Delivery	Training providers are free to structure and organize their training in the way they find most appropriate, provided the units of the syllabus are sufficiently covered. Training must be delivered via an ATO based on this syllabus. Training can be delivered virtually, via an e-learning / learning technology solution.

Terminology List

A candidate is expected to understand the following terms after completing an SOA course.

*- Denotes the term is covered at the Foundation level and should be covered in this module within the module's context.

Acceptance	Patterns of Business Activity (PBA)
Agreement	Planned Downtime
Agreed Service Time	Percentage Utilization
Availability*	Recovery
Availability Plan	Recovery Option
Business Capacity Management (BCM)	Redundancy
Business Case*	Reliability
Business Impact Analysis	Resilience
Business Relationship Management	Return on Investment (ROI)
Business Relationship Manager	Risk*
Business Service Catalogue	Service Assets
Business Unit	Service Capacity Management (SCM)
Capacity	Service Catalogue *
Capacity Management	Service Design
Capacity Management Information System (CMIS)	Service Design Package (SDP)
Capacity Plan	Service Hours
Capital Item	Service Investment Analysis
Capitalization	Service Knowledge Management System (SKMS)*
Chargeback	Service Level Agreement (SLA)*
Component Capacity Management (CCM)	Service Level Package (SLP)
Configuration Item (CI)*	Service Level Requirement (SLR)
Configuration Management System*	Service Level Target
Contract*	Service Manager
Contract Portfolio	Service Measurement
Cost Centre	Service Measurement Framework
Cost Element	Service Measurement Model
Cost Management	Service Metrics
Cost Types	Service Packages
Cost Units	Service Pipeline
Depreciation	Service Portfolio*
Direct and Indirect Cost	Service Provider
Downtime	Service Reporting
Event*	Service Request*
External Service Provider	Service Scorecard
Incident*	Service Valuation
Internal customer	Stakeholder
Internal Service Provider	Statement of Requirements (SOR)
Key Performance Indicator (KPI)*	Supplier*
Line of Service (LOS)	Supplier and Contract Database (SCD)
Marginal Cost	Supplier Management
Mean Time Between Failures (MTBF)	Technical Service Catalogue
Mean Time Between Service Incidents (MTBSI)	Terms of Reference (ToR)
Mean Time To Repair (MTTR)	Throughput
Mean Time To Restore Service (MTTRS)	Total Cost of Ownership (TCO)
Measurement	Total Cost of Utilization (TCU)
Metric	Underpinning Contract
Monitoring	Usability
Net Present Value (NPV)	Utility
Notional Charging	Variable Cost Dynamics
Operational Level Agreement*	Warranty
Opportunity Cost	

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