

# ITSM Roles

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## 1.0 Overview

The IT Service Management lifecycle involves a large number of roles, some of which are limited in scope to one specific process, others of which have responsibilities in several different processes. A given staff member may be required to be in different roles at different times, or several roles at the same time, depending on their specific job description, the specific situation, and the specific process(es) they are interacting with.

The following list provides definitions of the core responsibilities which “define” the roles across the ITSM framework. For a given role’s responsibility within a specific process (Incident Management, Problem Management, etc.) consult the Responsibility Matrix for that process. Additionally, some process-specific roles will have more detailed descriptions within the process in question; this is noted as well.

## 2.0 Roles and Primary Responsibilities

### 2.1 Individual Roles

ROLE	RESPONSIBILITY	EXAMPLES/NOTES
Business Owner	<ul style="list-style-type: none"> <li>• Define business processes and business requirements for a service</li> <li>• Primary sponsor for large-scale projects relating to this service</li> <li>• May oversee business group responsible for Tier 1 support for the service</li> </ul>	<ul style="list-style-type: none"> <li>• Provost, Registrar, AVP/Finance, etc.</li> <li>• May delegate day to day functions or activities to members of their organization</li> <li>• As an example: For Gargoyle, the Business Owner is the Registrar; the Customers are the Registrar, the VP-Student Life, the Provost, and other primary stakeholders; and the Users are the people who need to use Gargoyle for their everyday work.</li> </ul>
Change Manager	<ul style="list-style-type: none"> <li>• Ensure efficient flow of Change Requests through Change Management process</li> <li>• Enforce process and standards, and work to improve process.</li> <li>• Assure there is a Change record</li> <li>• Approve changes at unit level.</li> <li>• Review change plan and ensure its adherence to standards.</li> <li>• Participate in Change Advisory Board to review and approve changes across the organization.</li> </ul>	<ul style="list-style-type: none"> <li>• ITIL Role</li> </ul>
Change Owner	<ul style="list-style-type: none"> <li>• Takes a specific Change through the Change Management Process, from planning through approval to implementation</li> <li>• Owns the Change Request ticket</li> </ul>	<ul style="list-style-type: none"> <li>• Lead Technician for a specific Change</li> <li>• Implementation Manager</li> </ul>
Change Process Owner	<ul style="list-style-type: none"> <li>• Provide leadership for Change Management process</li> <li>• Accountable for the entire Change Management process</li> </ul>	<ul style="list-style-type: none"> <li>• Overlaps with Change Manager</li> <li>• Process Ownership is an ITIL concept</li> </ul>
Customer	<ul style="list-style-type: none"> <li>• Define or agree to Service Level Targets for a service</li> <li>• Define business strategy for a service and the business processes it supports</li> </ul>	<ul style="list-style-type: none"> <li>• Primary stakeholders for a service</li> <li>• IT may be its own Customer for some services</li> <li>• As an example: For Gargoyle, the Business Owner is the Registrar; the Customers are the Registrar, the VP-Student Life, the Provost, and other primary stakeholders; and the Users are the people who need to use Gargoyle for their everyday work.</li> </ul>

ROLE	RESPONSIBILITY	EXAMPLES/NOTES
Director+	<ul style="list-style-type: none"> <li>Leads/Manages a significant IT Services operational or support area</li> </ul>	<ul style="list-style-type: none"> <li>IT Services Director, Senior Director, or Executive Director</li> </ul>
Implementation Manager	<ul style="list-style-type: none"> <li>Coordinates and oversees planning and implementation of large or complex Changes.</li> </ul>	<ul style="list-style-type: none"> <li>See Change Management for detailed role description.</li> </ul>
Incident Manager	<ul style="list-style-type: none"> <li>Coordinate activities between multiple support groups to ensure adherence to extant Service Level Agreements where other groups are needed to resolve a single Service Desk incident.</li> <li>Ensure efficient flow of tickets through Service Desk (Tier 1/Tier 2)</li> <li>Track incidents escalated to others from Service Desk</li> </ul>	<ul style="list-style-type: none"> <li>Service Desk Manager</li> <li>ITIL role</li> </ul>
Incident Owner	<ul style="list-style-type: none"> <li>Owens a specific Incident from initial report to resolution</li> <li>Owens the ticket for a specific Incident</li> </ul>	<ul style="list-style-type: none"> <li>Tier 1 Service Desk staff</li> </ul>
Incident Process Owner	<ul style="list-style-type: none"> <li>Provides leadership for Incident Management process</li> <li>Accountable for the entire Incident Management proces</li> </ul>	<ul style="list-style-type: none"> <li>Director of Support Services</li> <li>Process Ownership is an ITIL concept</li> </ul>
IT Communications	<ul style="list-style-type: none"> <li>Provides leadership for communications standards and methods across IT Services</li> </ul>	<ul style="list-style-type: none"> <li>Sr. Communications Strategist for IT Services</li> </ul>
Lead Technician	<ul style="list-style-type: none"> <li>Leads and coordinates with other technicians in pursuit of a specific instance of technical activity (e.g. a specific change, resolution of a specific problem)</li> <li>May also lead a series of technical activities in pursuit of a specific goal (e.g. Lead Technician for a project)</li> </ul>	<ul style="list-style-type: none"> <li>Compare with Service Manager</li> </ul>
Liaison	<ul style="list-style-type: none"> <li>Communicate and coordinate IT-related issues and activities between IT Services and large campus client communities (e.g. Provost's Office, Financial Services, academic divisions or schools, etc.)</li> </ul>	
Outage Coordinator	<ul style="list-style-type: none"> <li>Provide management leadership and coordination for Incidents which involve large-scale or high-profile outages</li> <li>Ensure proper follow-up and resolution for Problems which cause large-scale or high-profile outages</li> </ul>	<ul style="list-style-type: none"> <li>See Outage Management for a detailed description of this role.</li> </ul>
Problem Manager	<ul style="list-style-type: none"> <li>Ensure efficient flow of Problem tickets through Problem Management process</li> <li>Enforce process and standards, and work to improve process.</li> </ul>	<ul style="list-style-type: none"> <li>ITIL role</li> </ul>
Problem Owner	<ul style="list-style-type: none"> <li>Owens a specific Problem from its originating Incident until its Resolution</li> </ul>	<ul style="list-style-type: none"> <li>Technician or Lead Technician</li> <li>Service Manager</li> </ul>

<b>Problem Process Owner</b>	<ul style="list-style-type: none"> <li>• Provides leadership for Problem Management process</li> <li>• Accountable for the entire Problem Management process</li> </ul>	<ul style="list-style-type: none"> <li>• Process Ownership is an ITIL concept</li> </ul>
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Owns a specific Project from the time it is made active until its completion</li> </ul>	
<b>Project Portfolio Manager</b>	<ul style="list-style-type: none"> <li>• Provides leadership for Project Portfolio Management process</li> <li>• Accountable for the entire Project Portfolio Management process</li> </ul>	<ul style="list-style-type: none"> <li>• Process Ownership is an ITIL concept</li> </ul>
<b>Scribe</b>	<ul style="list-style-type: none"> <li>• During an Outage, take notes on details of the outage, what information has been discovered about the nature and cause of the outage, what steps have been taken to restore service and the results of those steps, etc.</li> </ul>	
<b>Service Manager (SM)</b>	<ul style="list-style-type: none"> <li>• Lead day-to-day operational activities in support of a Service</li> <li>• May lead other technicians in this effort</li> </ul>	<ul style="list-style-type: none"> <li>• Team Lead</li> <li>• Manager</li> <li>• Compare with Lead Technician</li> </ul>
<b>Service Owner</b>	<ul style="list-style-type: none"> <li>• Work with Business Owner to determine strategy and Service Level goals for a Service</li> <li>• Ensure that the service delivers what it promises</li> </ul>	<ul style="list-style-type: none"> <li>• Director or Senior Director</li> </ul>
<b>Subject Matter Expert (SME)</b>	<ul style="list-style-type: none"> <li>• Provide specialized knowledge in specific aspects of a Service or in other technical areas of interest</li> </ul>	<ul style="list-style-type: none"> <li>• Technician or Service Manager for a Service</li> <li>• Lead Technician for a specific activity</li> <li>• Independent Contributor with specialized knowledge</li> </ul>
<b>Technician</b>	<ul style="list-style-type: none"> <li>• Responsible for day-to-day operation of a given Service</li> <li>• Resolve Problems and implement Changes for a given service</li> </ul>	
<b>User</b>	<ul style="list-style-type: none"> <li>• Uses the production environment in order to perform their job or otherwise fulfill their relationship with the University</li> </ul>	<ul style="list-style-type: none"> <li>• Students, staff, and faculty of the University</li> <li>• As an example: For Gargoyle, the Business Owner is the Registrar; the Customers are the Registrar, the VP-Student Life, the Provost, and other primary stakeholders; and the Users are the people who need to use Gargoyle for their everyday work.</li> </ul>
<b>Vendor Support</b>	<ul style="list-style-type: none"> <li>• Provide expertise, support, or hardware replacement relevant to their products</li> </ul>	

## 2.2 Group Roles

ROLE	RESPONSIBILITY	EXAMPLES/NOTES
Organizational Leadership	<ul style="list-style-type: none"> <li>• Manage operations across significant areas within IT Services</li> <li>• Approve ITSM processes</li> <li>• Approve or reject specific instances of ITSM activities</li> <li>• Engage staff in following defined ITSM processes</li> </ul>	<ul style="list-style-type: none"> <li>• IT Services Directors</li> </ul>
Problem Resolution Team	<ul style="list-style-type: none"> <li>• Identify Root Cause for Problems</li> <li>• Recommend workarounds or resolution actions</li> </ul>	<ul style="list-style-type: none"> <li>• Constituted by Problem Owner as necessary</li> <li>• Compare with Service Restoration Team</li> </ul>
Senior Leadership	<ul style="list-style-type: none"> <li>• Provide strategic management for IT Services</li> <li>• Provide strategic guidance for ITSM processes</li> <li>• Approve or reject specific instances of ITSM activities</li> <li>• Engage organization in following defined ITSM processes</li> </ul>	<ul style="list-style-type: none"> <li>• IT Services Senior and Executive Directors, CITO</li> </ul>
Service Desk	<ul style="list-style-type: none"> <li>• Function as primary point of contact for incidents reported from users.</li> <li>• Maintain incident ownership.</li> </ul>	<ul style="list-style-type: none"> <li>• Tier 1 client facing incident handlers.</li> <li>• Tier 2 Support Services technicians who deal with customers face-to-face.</li> </ul>
Service Restoration Team	<ul style="list-style-type: none"> <li>• Restore service as quickly as possible following a service outage-type Incident</li> <li>• As appropriate, gather data and lay groundwork for Problem Resolution Team to resolve the underlying Problem</li> </ul>	<ul style="list-style-type: none"> <li>• Constituted by Outage Coordinator when Outage Management Plan is activated</li> <li>• Compare with Problem Resolution Team</li> </ul>
Tier 1	<ul style="list-style-type: none"> <li>• Function as first point of contact for incidents and service requests from end users</li> <li>• Appropriately categorize, prioritize and escalate incidents and service requests which they cannot resolve</li> </ul>	<ul style="list-style-type: none"> <li>• Tier 1 client-facing incident handlers</li> </ul>
Tier 2	<ul style="list-style-type: none"> <li>• Troubleshoot and resolve incidents escalated from Tier 1</li> </ul>	<ul style="list-style-type: none"> <li>• Tier 2 Service Desk technicians</li> <li>• Desktop Support</li> </ul>
Tier 3	<ul style="list-style-type: none"> <li>• Respond to incidents which require deep technical knowledge or administrative privileges to resolve</li> <li>• Resolve problems underlying escalated incidents</li> </ul>	<ul style="list-style-type: none"> <li>• Technicians</li> <li>• Subject Matter Experts</li> </ul>