



ITIL® VERSION 3: QUALIFICATION SCHEME & ROLE-BASED TRAINING MATRIX WHITE PAPER

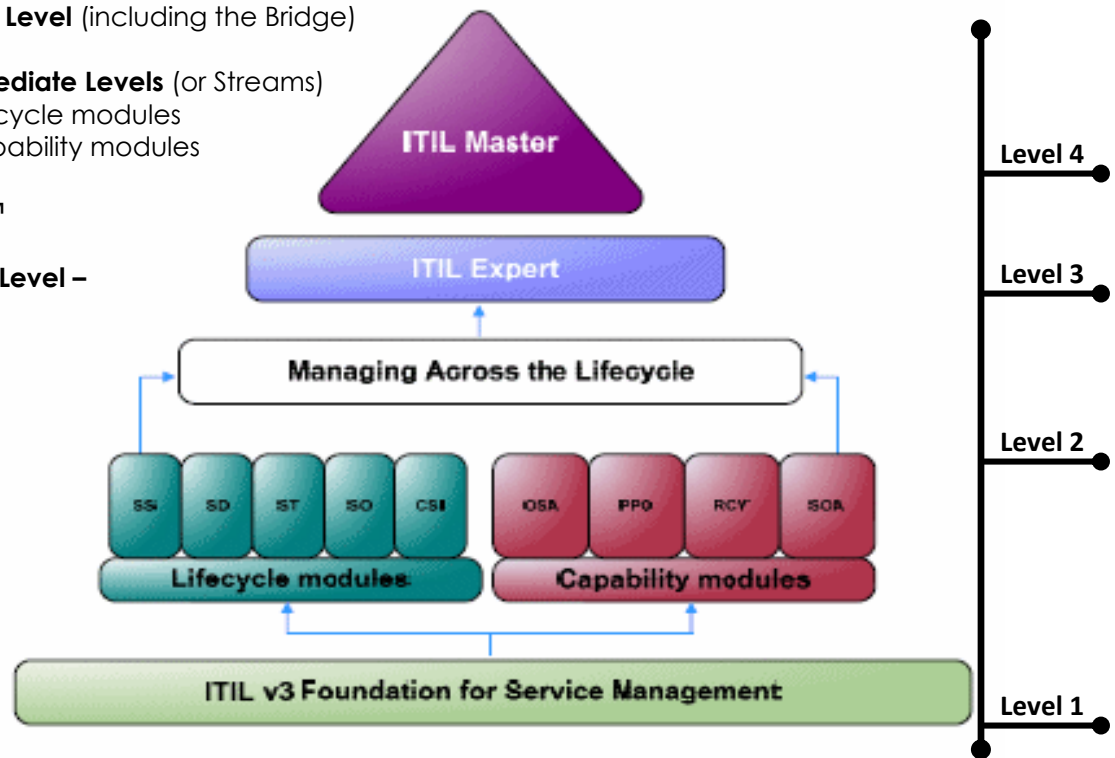
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OVERVIEW

The IT Infrastructure Library™ Version 3 (ITIL® V3) was released in June 2007. Also introduced by The APG Group (APMG), Official ITIL® Accreditor, was the Accredited Training Program. The ITIL® V3 Qualification Scheme¹ supports four (4) levels of certification. This document² details both the ITIL® V3 Scheme and the V2-V3 Bridging Scheme. The Qualification Scheme's 4 levels are shown here, in the inverse:

1. **Foundation Level** (including the Bridge)
2. Two **Intermediate Levels** (or Streams)
 - Lifecycle modules
 - Capability modules
3. **ITIL Expert™**
4. **Advanced Level – ITIL Master**



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The ITIL® Version 3 Qualification Scheme is supported by a credit system. At each level of education, learners successfully passing the associated certification examination will be awarded credits toward the highest level of certification in the IT Service Management industry today, the ITIL Expert™.

To become a certified ITIL Expert™, candidates must accumulate a minimum of 22 credits, beginning at the Foundation level (2 credits). Candidates holding a V3 Foundation certificate (or an ITIL® V3 Foundation Bridge certificate) can accumulate credits from either of the intermediate streams, and then must complete the mandatory **Managing Across the Lifecycle** course (5 credits) to become an ITIL Expert™. Practitioners are encouraged to utilize the web-based, interactive Credit Profiler³, released by APMG in November 2008.

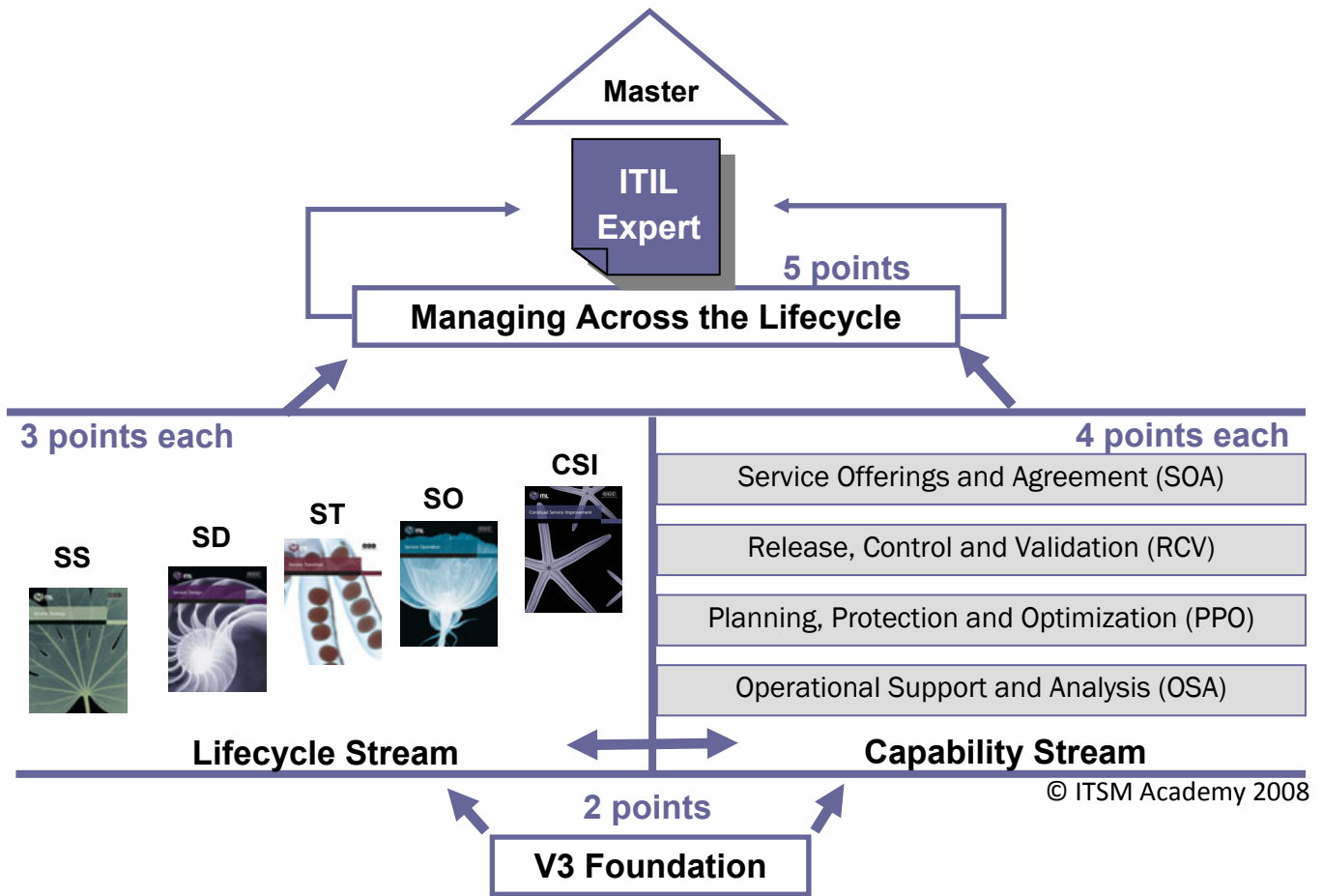
¹ The full ITIL® V3 Qualification Scheme was released by the Office of Government Commerce (OGC), owners of the ITIL® trademark, in early November 2007. Read the report at www.itil-officialsite.com.

² This document is based on the ITIL Service Management Practices: V3 Qualifications Scheme document written by the Chief Examiner, Sharon Taylor, released on November 7, 2007.

³ <http://www.itil-officialsite.com/itilmapping/v2/map.asp>

PATH TO ITIL EXPERT™ CERTIFICATION

As stated above, this certification is achieved by accumulating credits through the first two levels of the Scheme. There is no single examination required for this certification; however candidates must achieve credits through a selection of balanced subject areas. To achieve the certification, candidates must obtain a minimum of twenty two (22) credits, two of which must be from the **Foundation** module which is a mandatory first step, and five of which must be from the **Managing Across the Lifecycle** module which is a mandatory final step.



The diagram above provides further detail to the OGC Certification Scheme, shown on Page 1. This diagram indicates the “points” or credits earned with each certification.

1. Foundation Level

The Foundation Level focuses on knowledge and comprehension to provide a good grounding in the key concepts, terminology and processes of ITIL®. Once successfully completing either the V3 Foundation course or the Foundation Bridge, learners may proceed to the next level of certification.

2. Intermediate Level

The Intermediate level contains two streams: **Service Capability** and **Service Lifecycle**. The Service Capability stream is focused on role-based clusters. Like the V2 Practitioner clusters, each certification groups related processes and roles. This offers the learner a balanced knowledge of ITIL® practices which have direct interaction and dependencies in their daily use. - See [Training Matrix](#)

The four **Service Capability clustered modules** (with the correlating Version 2 Practitioner Clusters) are:

<p><u>Release, Control and Validation (RCV)</u> (Release and Control - IPRC)</p> <ul style="list-style-type: none"> • Change Management • Release And Deployment Management • Service Validation And Testing • Service Asset & Configuration Management • Knowledge Management • Request Fulfillment • Service Evaluation <p>ITIL Expert™ Credits: 4 ITSM Academy Release: September 2008</p>	<p><u>Operational Support and Analysis (OSA)</u> (Support and Restore - IPSR)</p> <ul style="list-style-type: none"> • Event Management • Incident Management • Request Fulfillment • Problem Management • Access Management • Service Operation Functions <ul style="list-style-type: none"> ○ Service Desk ○ Technical Management ○ IT Operations Management ○ Application Management <p>ITIL Expert™ Credits: 4 ITSM Academy Release: October 2008</p>
<p><u>Service Offerings and Agreement (SOA)</u> (Agree and Define - IPAD)</p> <ul style="list-style-type: none"> • Service Portfolio Management • Service Level Management • Service Catalog Management • Demand Management • Supplier Management • Financial Management <p>ITIL Expert™ Credits: 4 ITSM Academy Target Release: March 2009</p>	<p><u>Planning, Protection and Optimization (PPO)</u> (Plan and Improve - IPPI)</p> <ul style="list-style-type: none"> • Capacity Management • Availability Management • IT Service Continuity Management • Information Security Management • Demand Management • Risk Management for Service Planning Protection and Optimization <p>ITIL Expert™ Credits: 4 ITSM Academy Target Release: June 2009</p>

The **Service Lifecycle** stream is focused on each stage of the lifecycle. Each certification covers the principles, processes, functions and activities within a given stage. Technology and implementation considerations are also discussed.

The five **Service Lifecycle** modules are:

Service Strategy	Service Design	Service Transition	Service Operation	Continual Service Improvement
SS Target Q2 2009	SD Target Q2 2009	ST Target Q2 2009	SO May 2009	CSI April 2009
ITIL Expert™ Credits: 3				

Candidates can choose modules from the **Capability** (4 credits each) or **Lifecycle** (3 credits each) streams and when seeking the ITIL Expert™ are expected to choose a balanced program overall.

3. ITIL Expert™

The **Managing Across the Lifecycle (MALC)** course is a free-standing qualification, but is also the final module of the Service Lifecycle and/or Service Capability tract, which leads to the ITIL Expert™.

The purpose of this module/certification is to educate on and test knowledge of the contents of the ITIL® V3 books; focusing on business, management and supervisory objectives, purpose, processes, functions and activities – and on the interfaces and interactions between the processes.

Managing Across the Lifecycle (MALC)
Target Date for Classroom Delivery Q2 2009
ITIL Expert™ Credits: 5

4. ITIL Master

Finally, the Advanced Level Certification will assess your ability to apply and analyze the ITIL® V3 concepts in new areas. This level / course and examination are currently under review by the OGC.

VERSION 1 AND 2 BRIDGING

Recognizing the value of - and investment in - prior education, the new credit system recognizes and grants credit for earlier Version 1 and 2 ITIL® certifications. Candidates who hold earlier certifications can update their knowledge and certification via a series of "bridging" courses, such as the **Foundation Bridging Course**. These courses also earn credits. See the final page of this document for a detailed breakdown.

All certifications must have been acquired from the following Accredited Examination Institutes:

- ✓ Examination Institute for Information Science (EXIN)
- ✓ Information Systems Examination Board (ISEB)
- ✓ Loyalist Certification Services (LCS)
- ✓ APM Group (APMG) – ITIL® Accreditor

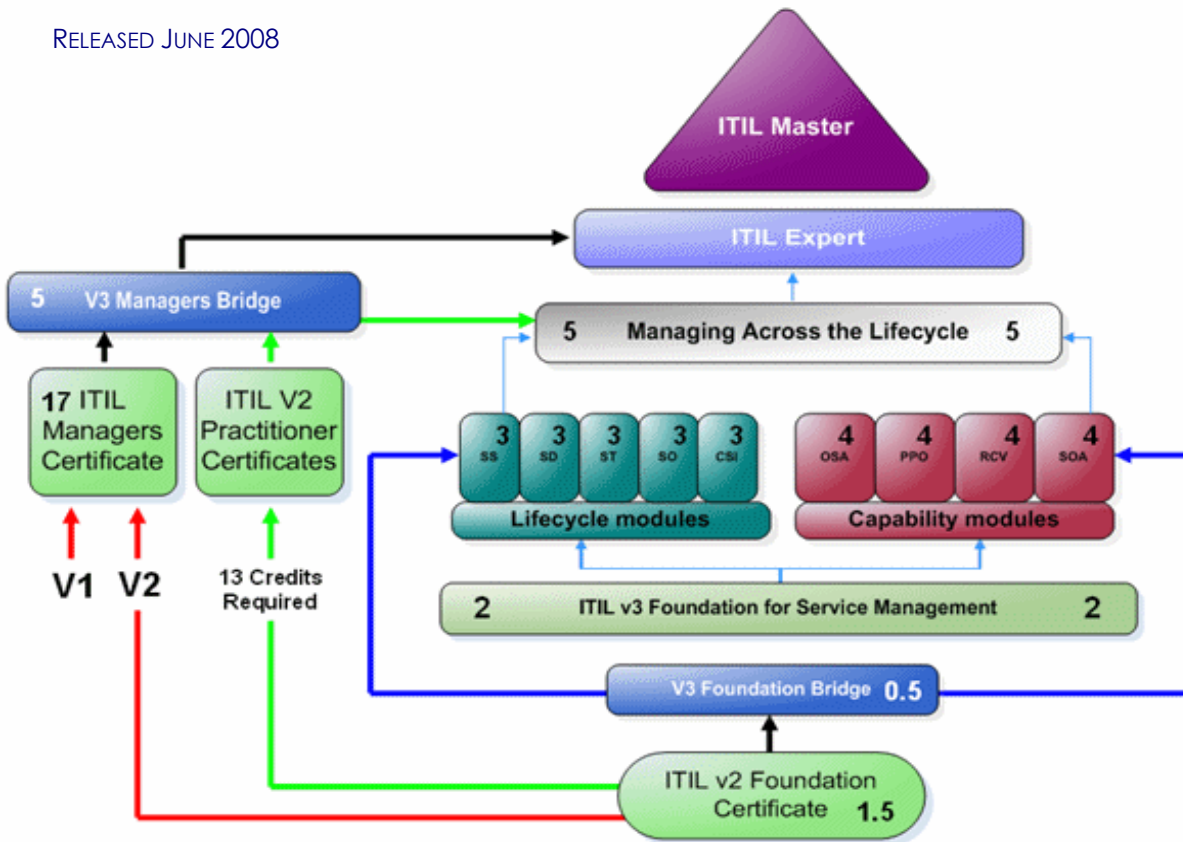
Foundation Bridge – This is a one (1) day bridging course which covers the differences between V2 and V3 and allows candidates to take an examination to demonstrate their understanding of the ITIL® V3 approach.

V2 Practitioner certifications also accumulation credits towards the ITIL Expert™ Certification. Candidates holding a minimum of 12 credits from V2 Practitioner (clustered or single) certifications will be eligible for the V3 **Service Manager Bridge**. After completing the bridge course, candidates can attend the V3 **Managing Across the Lifecycle** course.

Service Manager Bridge – Any ITIL® Service Manager who wishes to gain the ITIL Expert™ Certification can take a bridging course and pass the examination. This five (5) day bridging course covers the new concepts within V3 and fully integrates the benefits of the service lifecycle approach.

ITIL® V3 QUALIFICATION SCHEME

RELEASED JUNE 2008



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Under the Qualification Scheme, the following credits and V2 and V1/V2 to V3 bridging certifications:

V1 / V2 Certification	Credit	Bridge Certification	Bridge Credit		
V2 Foundation:	1.5	V2 – V3 Foundation Bridge	0.5		
V2 Practitioner Clusters:					
Plan & Improve	3.5	Holders of 12 credits or more are eligible for the V3 Managers Bridge and Managing Across the Lifecycle , leading to ITIL Expert™ Certification	5		
Agree & Define	3.5				
Support & Restore	3.5				
Release & Control	3.5				
V2 Practitioner Single:					
Service Desk & Incident Man	2				
Service Level Management	2				
Release Management	2				
Problem Management	2				
IT Service Continuity Man	2				
Financial Management	2				
Configuration Management	2				
Change Management	2				
Capacity Management	2				
Availability Management	2				
V1/ V2 Service Manager:	17	V3 Managers Bridge leading to ITIL Expert™ Certification	5		

ITIL® INTERMEDIATE TRAINING MATRIX BASED ON ROLE

The two streams of the Intermediate level, Service **Capability** and Service **Lifecycle**, have caused confusion as to which course(s) are the most appropriate for a candidate to pursue. In a nutshell, the Capability courses focus on the design and implementation of ITIL® processes. The Lifecycle courses focus on the contribution of these processes to the overall IT Service Lifecycle and are concerned with management and control, rather than design and implementation.

As a general rule, if candidates are operations and technical Subject Matter Experts (SMEs) capable of developing and implementing ITIL® operational specific processes and procedures, the **Capability** stream is the better choice. Typically, these individuals will be Process Owners, Managers and Task Leads. They serve in functional roles operating, managing and supporting the infrastructure and IT services.

Lifecycle education is aimed at individuals tasked with developing processes to coordinate and manage the activities of the various Lifecycle process owners. These individuals are most likely senior managers with a broad view of organizational requirements who can sponsor and support the development and installation of processes within the Lifecycle area.

The following Role-Based Training Matrix, developed by Rodger Baker, Service Manager/ITIL Expert™, Science Applications International Corporation (SAIC), will hopefully clarify the appropriate training path per role.

Role	V2 Practitioner Courses	Recommended V3 Capability Courses
Network Operations	Support and Restore (IPSR) Plan and Improve (IPPI) Release and Control (IPRC)	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Desktop Support	Support and Restore (IPSR) Plan and Improve (IPPI) Release and Control (IPRC)	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Data Center Management	Support and Restore (IPSR) Plan and Improve (IPPI) Release and Control (IPRC)	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Server Support and Administration	Support and Restore (IPSR) Plan and Improve (IPPI) Release and Control (IPRC)	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Change and Configuration Managers	Release and Control (IPRC)	Release, Control and Validation (RCV)
Asset Management	Release and Control (IPRC)	Release, Control and Validation (RCV)
Development and Engineering	Release and Control (IPRC)	Release, Control and Validation (RCV)
QA and Testing	Release and Control (IPRC)	Release, Control and Validation (RCV)
Support Desk	Support and Restore (IPSR)	Operational Support and Analysis (OSA)
Security and IA	Support and Restore (IPSR) Plan and Improve (IPPI) Release and Control (IPRC)	Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO) Release, Control and Validation (RCV)
Account and Service Management	Agree and Define (IPAD)	Service Offerings and Agreement (SOA)

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Financial Management	Agree and Define (IPAD)	Service Offerings and Agreement (SOA)
Contracting	Agree and Define (IPAD)	Service Offerings and Agreement (SOA)
Program and Project Management	Agree and Define (IPAD)	Service Offerings and Agreement (SOA)
Metrics and Measurement	Support and Restore (IPSR) Agree and Define (IPAD)	Operational Support and Analysis (OSA) Service Offerings and Agreement (SOA)
Process and Procedure/Tech Writing		Release, Control and Validation (RCV) Operational Support and Analysis (OSA) Planning, Protection and Optimization (PPO)

Role	Recommended V3 Lifecycle Courses
Business Development and Capture Managers	Service Strategy Service Design
Service Delivery and Account Managers	Service Strategy Service Design
Senior Process and Procedure Engineers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Application Developers and Managers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Data and Network Facility Operations Managers	Service Design Service Transition Service Operation Continual Service Improvement (CSI)
Senior Development, Testing and QA/QC Managers	Service Transition Continual Service Improvement (CSI)
Project Controllers	Service Strategy Service Design Continual Service Improvement (CSI)
QMS Managers	Continual Service Improvement (CSI)
Project Managers	Service Design Service Transition Continual Service Improvement (CSI)