General Guidelines for Building Effective Service Catalogs
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Introduction

Service catalogs are an important topic to most organizations pursuing the adoption of service management best practices. Many service management adoption programs begin with the creation of a service catalog. Unfortunately, service catalog projects can be risky and costly, and often fail to deliver their promised benefits. However, organizations can realize the benefits of service catalogs if they follow the guidelines ITIL® provides, supplemented with the real-world experience from those organizations that have successfully implemented service catalogs. This paper presents a basic overview of service catalogs and provides some general guidelines for building effective service catalogs based on the real-world experiences of several organizations.

What Is a Service Catalog?

Simply put, a service catalog is a boundary. The boundary that a service catalog establishes clearly communicates the services that a service provider chooses to provide to its customers. A service catalog is a structured grouping of live services that are available to customers. Typically a service catalog provides information about a number of services, and will typically define the following:

- A description of each service
- The price of each service and how charging occurs
- The owner of each service
- How to order each service

Based on context, organizations can add additional information to their service catalogs to meet the needs of their customers.

Service catalogs can be presented in two ways. First, there is a business/customer view of the service catalog that describes the details of services that are directly available to customers along with the business processes that are supported by those services. Second, there is a technical/supporting service catalogue view that contains details of underlying IT services with their relationship to the services in the business service catalog. The way in which a service catalog is presented defines a boundary. A business service catalog is intended for use by the business and, as such, this boundary will typically not include technically oriented services, whereas a technical service catalog is intended for a more technical audience and will typically include technically oriented services.
The best way to understand service catalogs is to look at real-world examples. The most common and familiar real-world representation of a service catalog is the menu at a restaurant. The menus at most restaurants list the “services” or “items” that customers can purchase. The menu defines a boundary. For example, if the restaurant only has hamburgers on the menu, it’s very unlikely that a customer would be able to order egg rolls. In effect, restaurants use their service catalog to define a clear boundary so that customers understand what can and cannot be ordered.

In addition to a menu, restaurants will typically have a way that they order all of the components of the items on their menu. For example, a restaurant that only serves hamburgers will need a way to order meat, buns, pickles, onions, tomatoes, etc. Often, restaurants will have a behind-the-scenes catalog that their staff uses to order these components.

To see this in action, go to almost any restaurant and attempt to order a bag of onions. In all but the most extreme cases, this can’t be done because the restaurant has defined a clear boundary with their menu of the services that can be ordered. Typically, bags of onions are not one of those services. However, the manager of the restaurant has a way to replenish components, such as onions, and typically interfaces with a behind-the-scenes equivalent to a technical services catalog that allows him to do things such as order bags of onions.

The issue with many IT organizations is that they fail to establish a clear boundary, like a menu, with the business for the services that they can order. In effect, they have such a porous boundary that the business is allowed to come into the kitchen and not only order bags of onions, but also do the equivalent of ordering 12 different types of onions in different cuts. Such inconsistency often leads to higher cost and lower quality.

Effectively, a service catalog establishes a boundary and, because of that boundary, service providers are able to better control and market the services they provide.

General Guidelines for Building Service Catalogs

This is not another white paper about why your organization needs a service catalog. The benefits are clear. Where service catalogs typically fall short is in their implementation. There are numerous industry stories of companies spending too much money and taking too long to produce a service catalog that no one wanted to use. The point of this paper is to briefly describe a few general guidelines that tend to contribute to the successful implementation of a service catalog.

The following general guidelines will help to minimize the risk of spending too much money and taking too long to produce a service catalog.

Guideline 1 – Identify Actual Business Requirements

Many organizations would like to use their service catalogs as a type of portal that allows business users to request aspects of certain services. This is a noble goal, and in many industries, in order to be competitive, an organization must have a catalog that provides this ability.
However, in many cases, organizations will build these catalogs and request procedures without ever discussing with the business how they actually request the services they need. In effect, what happens in this case is the organization ends up building a service catalog and request processes that reflect what they want, as opposed to what they really have and what their customers really do to request services. In these cases, service catalogs often go unused, as people figure out back-channel ways to request services and avoid the service catalog.

It is important when undertaking any service catalog project to identify, document, and understand the true needs of the customer.

Guideline 2 – Communicate Early and Often

One of the regularly occurring issues with services catalogs is that once they’re built, they go unused. This is often because the organization does not effectively communicate what the service catalog is, how it should be used, and what the value of it is to various stakeholders.

Fortunately this is an easy situation to address. The value of the service catalog should be communicated early and often to the business and service provider organizations, and those who are expected to use it should be trained about how to most effectively use the service catalog.

Guideline 3 – Identify Existing Catalogs

In most organizations, it is not uncommon to find some types of service catalogs that already exist in some state in the organization. Unfortunately, many service catalog implementations do not take this into consideration, with a tendency to start totally from scratch.

More often than not, conducting a small-scale audit of existing service catalogs in an organization before beginning a service catalog project will typically turn up information and examples that are in live use and that will greatly benefit the service catalog project.

By identifying the existing service catalogs that are in use throughout the organization, not only will existing boundaries and how those boundaries are presented be identified, but the organization will also benefit from potentially identifying existing request flows and modes of interaction with the existing service catalogs.

Guideline 4 – Include the Right Level of Information

Service catalog projects typically involve a healthy amount of documentation. However, it is often found out later that much of the documentation put into a service catalog was not necessary.

In order to avoid this, the organization should work closely with the business to identify the right level of information that needs to be presented in the service catalog.
Guideline 5 – Control the Number of Services

Having a high number of services in a service catalog does not necessarily make the service catalog better or more appropriate for the business. Having the right mix of services available in an easily accessible catalog is what the business wants.

Often, organizations will think that success at building a service catalog has something to do with the number of services that are enumerated. This is not so; success comes from having the right mix of services available in the catalog to match the needs of the markets and customers served.

Guideline 6 – The Magical Number 7, Plus or Minus 2

This is an approach to service catalogs that can be easily followed, fits well with guideline number 5, and tends to be more specific to business service catalogs.

In the 1950s, George Miller conducted a study titled “The Magical Number 7, Plus or Minus 2: Some Limits on Our Capacity for Processing Information.” Basically, this study concluded that human working memory is really good at working with between 5 and 9 discrete “chunks” of information. Presenting significantly more than 9 items tends to confuse humans. This rule of thumb tends to show up in many different fields and has been “discovered” repeatedly throughout history.

Cramming an extreme number of services into a service catalog tends to invoke this effect. Human working memory is quickly overwhelmed, and, in the case of service catalogs, this often makes people not want to continue using the catalog.

From a business perspective, most organizations can classify the high-level services they provide in between 5 and 9 items. In fact, the ITIL Service Strategy publication does this on page 90, in Figure 3.28, when it lists the 9 possible service archetypes that are available. Yes, there really are only 9 possible service archetypes that should be used to guide the creation of a service catalog.

This is a difficult guideline to follow, but it is one that pays off nicely as it allows the organization to establish a very clear boundary with the business.

Summary

This white paper briefly described what a service catalog is, the types of service catalogs, and gave a real-world analog to an IT service catalog. Furthermore, this paper listed 6 general guidelines that can be used to ensure that service catalog projects accomplish their intended goals. Those six guidelines are:

- Identify actual business requirements
- Communicate early and often
- Identify existing catalogs
- Include the right level of information
- Control the number of services
- Embrace the magical number 7 plus or minus 2
By including these guidelines in their approach to the creation of service catalogs, organizations are more likely to establish clear and manageable boundaries with their service catalogs, which ultimately lead to a realization of the benefits and value promised by service catalogs.

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**About the Author**

Michael Scarborough has worked in information technology for over twenty-two years in various roles including direct hands-on operation of IT systems, leadership of complex projects, establishing multi-platform automation, and adoption of service management best practices. He has helped numerous organizations in various industries adopt ITIL best practices and is a PMP, an American Society for Quality Six Sigma Black Belt, an ITIL v2 Service Manager, and an ITIL v3 Expert. Michael currently helps large and small organizations make significant improvements through adoption of ITIL best practices, and regularly delivers ITIL v3 training at all levels on behalf of Global Knowledge.