



Enterprise Service Management with the USM and CEM methods:

*Keeping Service Management's Heart
in the Right Place*

A Rolling Uphill eBook

ABSTRACT

In today's fast-moving business world, managing services is getting more complicated. To keep things simple and effective, we need to understand how to manage processes and services in an integrated way.

This eBook explains how the Customer Expectation Management (CEM) and Unified Service Management (USM) methods can help. By looking at services from both the *customer's* and the *provider's* points of view, we can make sure services meet expectations and are efficient.

By taking a *service* and a *process* perspective, we can also assure an outside-in and systems thinking approach to service management.

Whether you're a business leader, IT professional, or service manager, this book offers practical advice on delivering value and staying organized.

John Worthington

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Information about the Unified Service Management method is available at the USM Portal:

<https://usm-portal.com/?lang=en>

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Table of Contents

Preface	4
Introduction	6
<i>About the Unified Service Management (USM) method</i>	6
<i>About the Customer Expectation Management (CEM) method</i>	7
<i>The Business Capability Iceberg</i>	8
Chapter 1: Understanding Services	12
<i>Historical Context</i>	12
<i>Unified Service Management and Services</i>	13
<i>Customer Expectation Management and Services</i>	14
<i>Services and Service Management</i>	14
Chapter 2: The Role of Process in Service Management	16
<i>USM Method: Focused on the Management of Services</i>	16
<i>CEM Method: Focused on the Service Itself</i>	17
<i>Combining Systems Thinking and Outside-In Thinking in an Enterprise</i>	18
Chapter 3: Applying CEM and USM	21
<i>Recruiting and Onboarding Example – CEM and Outside-In Thinking</i>	21
<i>Recruiting and Onboarding Example – USM and Systems Thinking</i>	24
Chapter 5: Combining CEM and USM in the Enterprise	27
<i>Establish the Management System First</i>	28
<i>USM Deployment – Bottom-Up or Top-Down?</i>	30
Chapter 6: Challenges with Practice Guidance	33
<i>Recognizing Challenges with Good Practice</i>	33
Chapter 7: Why Customers Should Start with USM	37
<i>Getting to the Heart of Service Management</i>	37
For More Information	39
<i>Unified Service Management (USM) method</i>	39
<i>Customer Expectation Management (CEM) method</i>	39
Epilogue	41
About the Author	42

Preface

I have been on a long journey searching for the heart of service management, which is a critical success factor in any enterprise. But defining, managing, and improving services can be challenging.

In more than two decades working with various organizations, I've seen firsthand how challenging it can be to balance internal efficiency with the customer experience. This challenge is often exacerbated by the need to apply recursive methods at different levels of the organization, where clarity on roles, processes, and outcomes can become muddled.

I have had first-hand experience with outside-in and inside-out thinking, having started my career in sales and business development before spending two decades in the IT service management space.

I wrote this eBook to help make service management simpler and more accessible. It is not the purpose of this eBook to give the reader an in-depth understanding of either the USM or CEM methods--- the section on *For More Information* can provide you with that.

The methods described in this eBook include:

- The Customer Expectation Management (CEM) method

I first used CEM almost two decades ago and became a Certified Process Professional (CPP) and Certified Process Manager (CPM) thanks to Terry Schurter and Don Smith. The basics of the CEM method as outlined in the CPP/CPM programs have not changed since then and are used in this eBook.

- The Unified Service Management (USM) method

More recently I became a Certified USM Trainer and Coach and am currently focused on establishing USM in the USA. USM is designed to simplify service management by establishing a universal management system of processes and workflows that can be applied to any service environment, using any practice guidance.



It's tough to keep things running smoothly inside a company while also making sure customers have a great experience.

This problem gets worse when we try to do things over and over again in different parts of the company.

Sometimes it's hard to know who should be doing what, how things should be done, and what the final goal is.

By combining the insights from Customer Expectation Management (CEM) and Unified Service Management (USM), I'll show you how to manage services using these methods in a way that meets customer expectations and keeps your operations running smoothly.

The book also explores some other popular practice guidance used in enterprises today, and how these can seamlessly integrate into what is a universal, unified service management system for enterprise service management.

Finally, I'll point the reader to where they can more information about both the USM and CEM methods (much of it for free).

Introduction

Managing services is more than just a set of tasks; it's about creating value for customers and ensuring the organization runs smoothly. To do this well, we need to balance the needs of the customer with the realities of delivering the service.

In an era where customer experience is a key differentiator, organizations must be adept at defining and managing their services from the customer's point of view. Customer Expectation Management (CEM) and Unified Service Management (USM) offer powerful methods for achieving this.

But while these methods are simple to learn and use, “*simple isn't easy*”, particularly when these methods are applied recursively across different levels of an organization.

The Customer Expectation Management (CEM) method helps us understand what customers expect and how to meet those expectations. The Unified Service Management (USM) method provides a structured way to manage services, making sure everything works together seamlessly.

By examining how services can be defined and optimized from both outside-in and inside-out perspectives, this book provides valuable insights for business leaders, IT professionals, and service managers.

By integrating these two approaches, we can manage services more effectively, ensuring they are both customer-focused and operationally sound.

About the Unified Service Management (USM) method

The Unified Service Management Method (USM) is a simple method for establishing an enterprise-wide service management system that is consistent with and complimentary to existing and emerging frameworks and practices.

The Unified Service Management (USM) method specifies an enterprise service management architecture that promotes standardization and interoperability between service domains by providing a series of service building blocks that are addressed in the management system of each service organization.

USM supports an integral and integrated management approach which restores and optimizes the control over each service team's contribution to the whole system. A singular

normalized management system as an acceptable link is the core concept of the Unified Service Management method, and it is based on the concept of an integral and integrated process architecture.

An integrated, non-redundant process model with **5 processes** and a simple set of **8 workflows** serve as templates for all daily routines in any service providers' practice. The management of these routines can be considered the core of the USM method.

USM provides a standardized, unified link for sustainable supply chains in service ecosystems. The process model and standardized workflows are used by any organizational topology, leveraging any combination of practice frameworks for all service providers.

About the Customer Expectation Management (CEM) method

The Customer Expectation Management (CEM) method is a structured approach designed to align an organization's operations with customer expectations, ensuring that the delivery of products or services meets or exceeds what customers anticipate. CEM focuses on understanding, managing, and continuously improving the entire customer journey by clearly defining the processes involved and monitoring performance against customer-centric metrics.

CEM emphasizes placing the customer at the center of all business activities. It seeks to understand customer expectations at every touchpoint, from initial engagement to the final delivery of goods or services.

A cornerstone of the CEM method is the development of a Process Activity List (PAL). This is a detailed breakdown of all activities involved in the customer journey, ensuring that each step is clearly defined and managed.

CEM uses process diagnostics such as Moments of Truth, Process Break Points, and Business Rules to identify inefficiencies or misalignments with customer expectations.

This diagnostic approach helps organizations pinpoint specific areas where improvements are needed, ensuring that processes are optimized to better meet customer needs and enhance overall service quality.

NOTE: This eBook uses the Customer Expectation Management (CEM) method, originally described by Terry Schurter and Steve Towers in the early 2000's. CEM has significantly evolved over the years to become what is now known as CEMMethod v15.

The section, [For More Information](#) provides details.

The Business Capability Iceberg

Business capabilities represent the fundamental abilities of an organization to deliver value, encompassing everything from strategic planning to daily operations. These capabilities are the building blocks of business success, defining what an organization can do to achieve its goals. At their core, business capabilities are about aligning people, processes, and tools/technology with the strategic objectives of the organization.

When we explore these capabilities, two critical perspectives emerge: a process perspective and a service perspective.

The process perspective sharpens our understanding of the operational model of a business capability, focusing on the sequence of activities required to achieve a specific outcome. It emphasizes efficiency, consistency, and the systematic execution of tasks.

On the other hand, the service perspective deliberately abstracts the internal operations, concentrating on the value delivered to the customer or end-user. This perspective is customer-centric, prioritizing the experience and satisfaction of those who benefit from the business capability.

By integrating both perspectives, organizations can create a holistic approach to defining and managing their capabilities, ensuring that internal efficiency is balanced with external value delivery. Understanding these perspectives is essential for defining how a business operates and how it serves its customers.

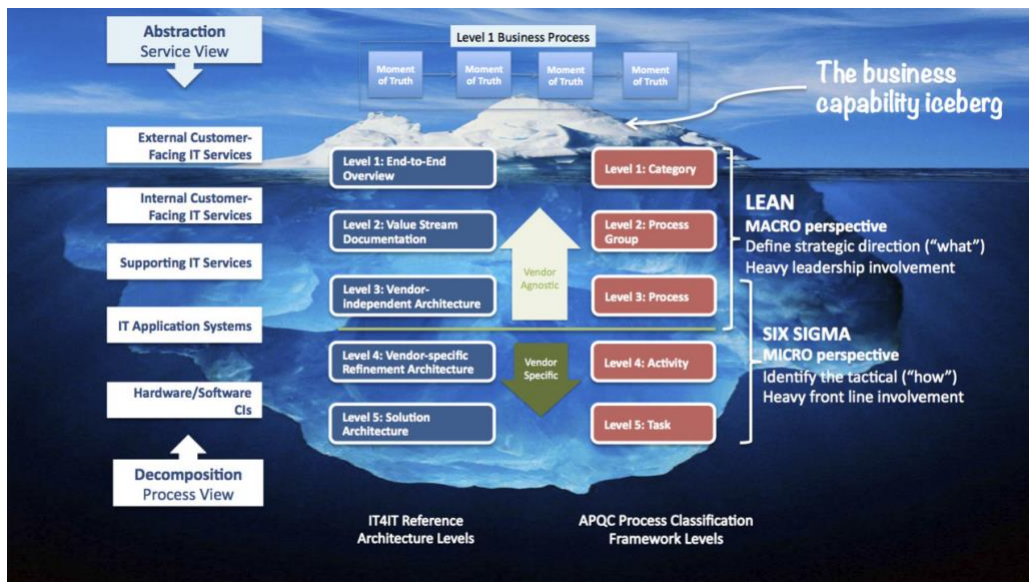


Figure 1 - from <https://www.linkedin.com/pulse/business-capability-iceberg-john-worthington/?trackingId=WkFTLZOmT%2BByvI%2Br56ObI7A%3D%3D>

Recursion and Business Results

Recursion is a concept where a process or structure is defined in terms of itself. In the context of USM and CEM, recursion can manifest when these methods are applied repeatedly across different parts of the enterprise.

One of the main challenges of recursion as it relates to processes and services is maintaining clarity on who the customer is. As services and processes are defined at lower levels, there is a risk of shifting to an inside-out perspective, where internal efficiency takes precedence over customer outcomes. This can lead to service designs that are optimized for internal operations that do not clearly link to business results.

While recursion is helpful in understanding these lower level customer/supplier relationships, these are below the water line. All business results are outside the enterprise -- essentially at the top of the business capability iceberg.

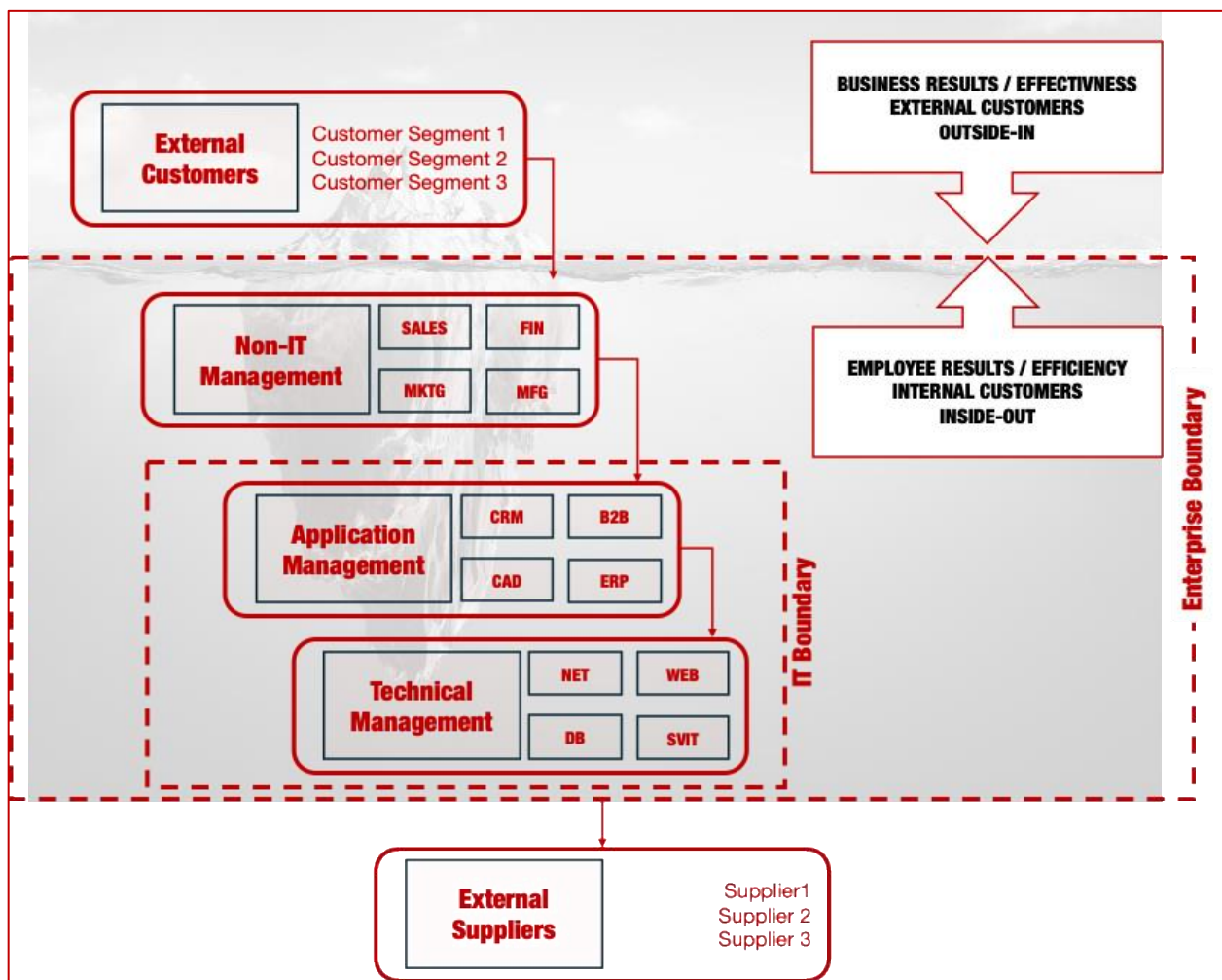


Figure 2 - Customer-Provider Relationships and Recursion

External customers are the primary reason a business exists. Their satisfaction, loyalty, and spending directly impact the business's bottom line. Therefore, the effectiveness of a business's products or services in meeting their needs is crucial for achieving business results.

Internal customers are the employees within an organization who rely on the services or products of other departments to perform their jobs.

For example, a salesperson might rely on the marketing department to provide effective promotional materials or the IT department to maintain a reliable network. The efficiency of these internal services can significantly impact the productivity and overall performance of the organization.

While there's some overlap between effectiveness and efficiency, focusing on external customers ensures the business is meeting the needs of its market, while focusing on internal customers helps optimize processes and reduce waste.

Outsourcing and Complexity

The introduction of outsourcing and external suppliers significantly compounds the recursive nature of customer/supplier relationships within an enterprise.

Outsourcing introduces additional layers of relationships into the supply chain. An enterprise becomes both a customer of its external suppliers and a supplier to its outsourced service providers. This creates a more complex network of interdependencies.

Service Integration and Management (SIAM): In the context of outsourcing, SIAM is practice guidance for managing the complexities of multi-supplier environments. It involves coordinating and integrating services provided by multiple suppliers to ensure seamless delivery to the end customer.

The Unified Service Management (USM) method complements SIAM and other practice guidance by providing a simplified, universal management system that integrates seamlessly with various practice frameworks, enhancing overall service delivery.

The responsibility for quality, delivery, and cost is now shared between the enterprise and its external suppliers. This can make it more difficult to pinpoint the root cause of issues and identify appropriate improvement actions.

The enterprise has become more dependent on the performance of its external suppliers. If a supplier fails to meet its obligations, it can disrupt the entire supply chain and impact the enterprise's ability to deliver its products or services to its own customers.

Managing these additional relationships requires new skills and practices. Enterprises must develop effective communication, collaboration, and contract management strategies to ensure that their external suppliers are meeting their expectations.

In essence, outsourcing and external suppliers introduce new levels of complexity and risk into the recursive nature of customer/supplier relationships.

NOTE:

Viewing another department or employee as a customer within an organization is often referred to as an "internal customer" approach. However, this perspective may not fully align with the "outside-in" approach for the following reasons:

Focus on Internal Transactions: When a department views another department or employee as a customer, the focus is typically on internal transactions and service delivery within the organization. This approach emphasizes satisfying the needs of internal stakeholders rather than the actual end-customer who consumes the organization's final product or service. The "outside-in" approach, on the other hand, prioritizes understanding and meeting the needs of the external customer who directly interacts with and purchases from the organization.

Limited Perspective on Value Creation: In an "internal customer" model, the value is often defined in terms of how well departments serve each other. This can lead to optimizing internal processes without considering their impact on the end-customer experience. An "outside-in" approach requires departments to align their efforts with the broader goal of creating value for the external customer, ensuring that every internal activity ultimately enhances the end-customer's experience.

Risk of Siloed Thinking: Viewing departments or employees as customers can reinforce siloed thinking, where each department focuses on its own objectives and metrics. This can create barriers to collaboration and reduce the overall effectiveness of the organization in delivering value to the external customer. The "outside-in" approach encourages a holistic view where all departments work together to deliver a seamless and valuable experience to the external customer.

Alignment with Organizational Goals: An "outside-in" approach ensures that all departments and employees are aligned with the organization's overarching goals of meeting external customer needs and driving business success. The "internal customer" approach may lead to misalignment, where departments prioritize their internal customer relationships over the organization's strategic objectives.

In summary, while viewing another department or employee as a customer can improve internal service and collaboration, it does not fully embody the "outside-in" approach, which prioritizes the external customer's needs and aligns the entire organization towards delivering value to them.

Chapter 1: Understanding Services

Services are more than just tasks or processes—they are about delivering value to customers. In this chapter, we'll explore what a service is and how it differs from goods or products.

Historical Context

The meanings of the words 'goods', 'products', and 'services' have evolved over the years in response to cultural, technological, and societal shifts:

- Originally, "goods" referred primarily to tangible items, things that could be touched, traded, and owned.
- As economies have shifted from manufacturing-based to service-based, the term "product" has expanded to include not just physical items but also services and experiences.
- "Services," once perhaps narrowly viewed as simple transactions, are now understood in more complex ways, often involving co-creation between provider and consumer.

In the traditional **Goods-Dominant** logic of the previous century, the product was defined as the goods you produced—physical items that could be manufactured, owned, and sold. In this logic, a 'service' was viewed as merely after-sales support, something supplementary to the primary offering of goods.

In the **Service-Dominant** logic of the 21st century, the term 'product' is redefined to represent what the service provider actually produces: the service itself. The goods involved, whether tangible or intangible, are part of the service but are not the product in their own right. Instead, they are components of the facility that, together with actions, contribute to the overall service.

In the Experience Economy, the value is in how goods and services are orchestrated to create memorable and engaging experiences.

*“An **experience** occurs when a company intentionally uses **services** as the stage, and **goods** as props, to engage individual customers in a way that creates a memorable event.”*

- Welcome to the Experience Economy, Harvard Business Review

Unified Service Management and Services

USM defines a service as a **supported facility**. A service is a facility made available to a customer and its users by a service provider who supports the customer when its users are utilizing that facility.

The **facility** is basically what the service does, or what it can do for the customer. It includes the supported goods and/or actions that the service provider makes available to the customer and the users as part of the service.

In USM, the focus shifts from the traditional goods-centric view to a service-centric perspective, where the service—the supported facility provided to the customer—is the true product of the service provider.

USM's definition of a service as a supported facility highlights the importance of the ongoing relationship between the provider and the customer, focusing on the experience of using the service rather than merely the transaction of goods.

By defining goods as components of a service rather than standalone products, USM emphasizes that these goods contribute to a larger experience facilitated by the service provider.

USM's view of product as the service itself reflects the shift from selling goods to delivering experiences.

Using the USM definitions, we see how services are actions performed to meet the needs of customers. Unlike goods, which are tangible, or products, which are the result of combining goods and services, services are intangible and directly tied to customer expectations.

It's important to note that a services perspective deliberately abstracts the internal operations of a business capability and presents the outcome to the customer. It focuses on the value delivered rather than the means of delivery.

It's also important to note that USM provides a structured way to *manage* services, while CEM helps us understand what customers expect and how to meet those expectations.

This leads to a discussion about *processes*, which provide a detailed view of the operational model behind a business capability. It sharpens the understanding of the of the operational

model of this capability, showing the intricate workings and sequences of actions that drive the capability.

But before we get into processes, let's see how CEM views services.

Customer Expectation Management and Services

The Customer Expectation Management (CEM) method, while not explicitly designed to address services, inherently aligns with a services-oriented perspective due to its emphasis on managing customer expectations. In service-oriented businesses, the value delivered is often intangible and deeply intertwined with the customer's experience and perception. The success of a service is frequently measured by how well it meets or exceeds customer expectations, making the management of these expectations crucial.

CEM's focus on understanding, shaping, and meeting customer expectations mirrors the core principles of service management, where customer satisfaction and perceived value are paramount. By proactively managing what customers expect from a service—whether in terms of performance, outcomes, or interactions—CEM helps ensure that the service provider and customer are aligned.

This alignment is vital in service contexts, where the quality of the relationship and the ongoing experience often define the value more than the service's tangible components. Thus, even though CEM doesn't explicitly target services, its principles are highly applicable in any service-oriented environment where managing customer perceptions and experiences is key to delivering value.

Services and Service Management

There is an important distinction between services and service management that often guides how methods like Customer Expectation Management (CEM) and Unified Service Management (USM) are applied. Services, in the broad sense, refer to the activities, outcomes, or experiences provided to customers that fulfill their needs or solve their problems.

These are typically customer-facing and are the primary focus of CEM, which seeks to optimize business processes to better align with customer expectations. Most enterprises using CEM will naturally concentrate on refining these external services, ensuring that the value delivered meets or exceeds what customers anticipate.

Service management, on the other hand, is concerned with how these services are organized, delivered, and maintained. This is where USM comes into play. USM focuses on establishing

a systematic approach to managing services, ensuring consistency, reliability, and efficiency across the board.

While CEM might help a company fine-tune its customer interactions and service delivery, USM provides the underlying framework that supports these services—establishing processes, workflows, and governance that ensure services are sustainable, scalable, and continuously improved.

Chapter 2: The Role of Process in Service Management

Processes are the backbone of service management. They define how services are delivered and ensure that everything runs smoothly.

The USM method and the CEM method both emphasize processes but from different angles, reflecting their distinct goals in service management. Understanding their differences and how they can be integrated can help enterprises define and manage services more effectively.

In this chapter, we'll look at how USM and CEM approach processes differently. USM focuses on standardizing processes across the organization, making it easier to manage services at scale. CEM, on the other hand, looks at processes from the customer's perspective, ensuring that they meet or exceed expectations.

We'll explore how these two approaches can be combined to create a service management system that is both efficient and customer focused.

USM Method: Focused on the Management of Services

The Unified Service Management (USM) method is a standardized approach to managing services across any type of organization, regardless of the industry. USM is designed to simplify service management by establishing a universal management system of processes and workflows that can be applied to any service environment.

The core idea behind USM is that service management should be consistent, scalable, and adaptable, regardless of the specific practices or frameworks an organization uses. Its core processes—AGREE (Contract Management), CHANGE (Change Management), RESTORE (Incident Management), OPERATE (Operations Management), and IMPROVE (Risk Management)—provide a universal structure that applies to any service type, whether IT or non-IT.

These processes form the backbone of the service management system, ensuring that all aspects of service delivery, from agreements and changes to incidents and risks, are handled systematically. Each process is designed to be non-redundant, meaning that they cover all necessary aspects of service management without overlap, making the system both efficient and easy to implement.

In addition to these processes, USM includes eight standard workflows that guide the execution of tasks within these processes. These workflows are designed to be flexible, allowing organizations to integrate various practices, frameworks, or industry standards as needed. This flexibility is a key feature of USM, as it allows organizations to tailor their

service management system to their specific needs while maintaining a consistent, unified approach across all services.

USM also emphasizes the importance of a service management architecture that aligns with the organization's goals and strategies. This architecture provides a clear structure for how services are managed and delivered, ensuring that all processes and workflows are integrated and aligned with the organization's objectives.

The ultimate goal of USM is to provide a simple, universal system that can manage any service in any organization, promoting efficiency, consistency, and continuous improvement.

CEM Method: Focused on the Service Itself

The CEM method, on the other hand, is more concerned with the service itself, particularly how customer expectations are managed throughout the customer journey.

It emphasizes understanding and defining the service from the customer's perspective, ensuring that processes align with delivering successful customer outcomes as defined by the customer. The CEM method is about tailoring business capabilities to meet specific customer needs and enhancing the service experience.

The CEM method is focused on aligning business processes with customer expectations. While CEM doesn't specifically target service management, it plays a critical role in ensuring that the services provided meet or exceed customer expectations.

The core idea behind CEM is that understanding and managing what customers expect is key to delivering value, maintaining customer satisfaction, and fostering long-term relationships.

CEM uses the concept of **Process Activity Lists (PALs)**, which are detailed breakdowns of the steps involved in delivering a service or product. By mapping out these activities, organizations can identify where customer expectations are most likely to be formed, met, or exceeded.

This allows businesses to focus their efforts on optimizing those key touchpoints, ensuring that customers have a positive experience at every stage of their interaction with the organization. PALs are essential in identifying gaps or inefficiencies in current processes that might lead to unmet expectations, providing a clear roadmap for improvement.

Another critical component of the CEM method is **Process Diagnostics**, a systematic approach to evaluating and improving business processes to better align with customer expectations. This involves analyzing customer feedback, performance metrics, and other data to identify areas where the service or product delivery can be improved.

Process diagnostics help organizations make data-driven decisions about where to focus their improvement efforts, ensuring that changes are made where they will have the most significant impact on customer satisfaction and the customer experience.

CEM also emphasizes the importance of communication and transparency in managing customer expectations. By clearly communicating what customers can expect from a service or product, organizations can reduce the risk of misunderstandings or disappointment.

This proactive approach to expectation management helps build trust and confidence with customers, leading to higher satisfaction and stronger relationships. In essence, CEM provides a structured approach to ensuring that business processes are aligned with customer needs, helping organizations deliver consistent value and maintain competitive advantage.

Combining Systems Thinking and Outside-In Thinking in an Enterprise

To achieve both comprehensive service management and high customer satisfaction, an enterprise can combine USM and CEM by using USM to establish a robust enterprise service management system and applying CEM to refine and adapt business processes to better align with customer needs.

Integrating 'outside-in' thinking from CEM with systems thinking from USM creates a powerful approach to optimizing service management, ensuring that it is not only efficient but also deeply aligned with customer needs.

Outside-In Thinking from CEM

'Outside-in' thinking is central to the CEM method and focuses on viewing the organization and its processes from the customer's perspective. It starts by understanding the customer's journey, identifying their needs, expectations, and pain points.

When applied to USM routines, 'outside-in' thinking involves examining each process and workflow through the lens of the customer experience. This perspective ensures that the routines are not just efficient internally but also deliver value and satisfaction to the customer.

Systems thinking in USM emphasizes understanding how different components of the service management system interact and influence each other. It looks at the service management system as a whole, considering how changes in one process might affect others and the overall service delivery. This holistic approach ensures that any improvements made are sustainable and integrated across the organization.

When combined with CEM's outside-in thinking, systems thinking helps ensure that customer-focused changes are not made in isolation but are integrated across the entire service management system.

The dual approach of using CEM and USM ensures that changes to routines are managed effectively from both an internal and external perspective.

When changes to USM's procedures or work instructions are proposed, CEM guides the organization in analyzing how these changes will affect the customer journey. This could involve customer feedback loops, scenario testing, and a thorough review of how the changes align with desired customer outcomes.

From a systems thinking standpoint, USM ensures that changes are implemented without introducing new inefficiencies or inconsistencies in the service management system. USM maintains the focus on how all services and processes interconnect, ensuring that improvements are sustainable and beneficial across the enterprise.

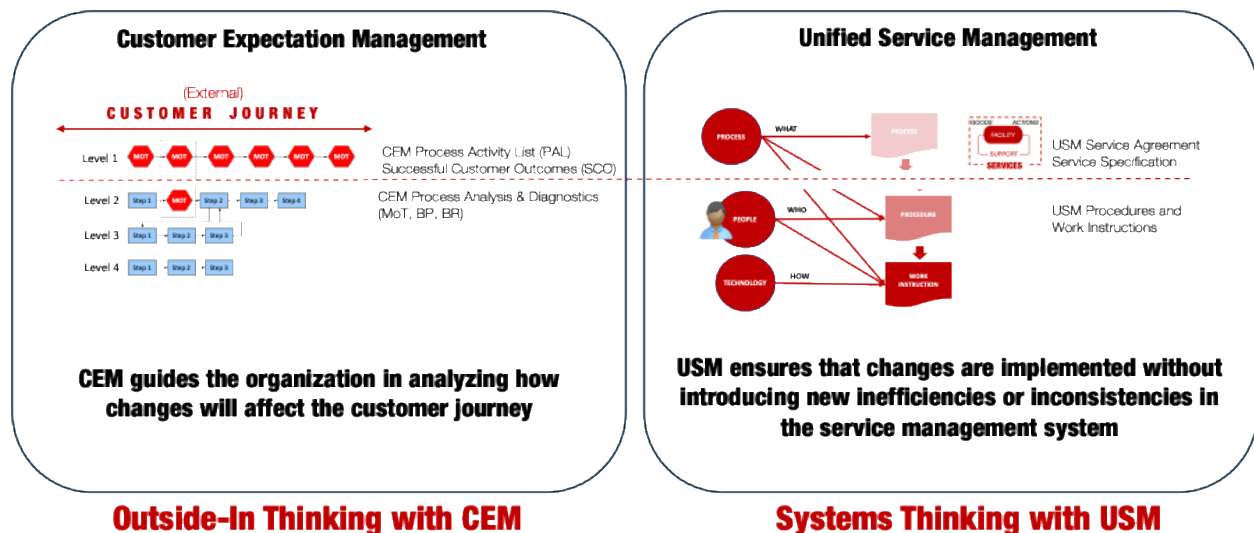


Figure 3 - Outside-In and Systems Thinking

USM's operational procedures and work instructions, while primarily designed to maintain internal consistency and efficiency within an organization, can also have significant

implications for customer-facing routines. This dual functionality enhances the customer experience by ensuring that the behind-the-scenes processes are directly aligned with customer needs and expectations.

USM's operational procedures and work instructions, when viewed through the lens of CEM, are not just internal tools but are integral to the customer experience. By treating these procedures as customer-facing routines, organizations can ensure that every aspect of their service management system is aligned with customer expectations.

CEM's process diagnostics play a crucial role in this integration, providing the insights needed to continually refine and optimize these routines to meet evolving customer needs. This dual approach ensures that services are not only managed effectively from an internal perspective but also deliver the value and experience that customers expect.

Transactions and customer operating actions are critical components of production services, and USM's Operate process is well-equipped to manage them as standardized routines.

By integrating these routines into the broader service management system, USM ensures consistency and reliability in service delivery. When complemented by CEM, these routines can be further optimized to align with customer expectations, ensuring that the service provider not only operates efficiently but also delivers a superior customer experience.

By combining CEM's focus on the customer experience and outside-in perspective with USM's application of systems thinking, an enterprise can achieve a balanced approach to service management. CEM ensures that the organization remains customer-centric, constantly adapting to meet customer expectations.

At the same time, USM provides the structure and systems thinking necessary to ensure that these adaptations are integrated into the broader management system, resulting in holistic and sustainable improvements. This combination enables the enterprise to deliver exceptional customer experiences while maintaining operational efficiency and effectiveness.

Chapter 3: Applying CEM and USM

Recruiting and Onboarding Example – CEM and Outside-In Thinking

Combining the "outside-in" and "inside-out" perspectives in recruiting and onboarding services involves recognizing that the new employee transitions from being a "customer" to a "user" as they move through the different stages of the process.

The outside-in perspective considers the employee's journey from their initial interaction with the organization until they accept the job offer. Once hired, the inside-out perspective focuses on how the organization (the provider) delivers services to the employee (now a user) to ensure a successful onboarding and integration into the organization.

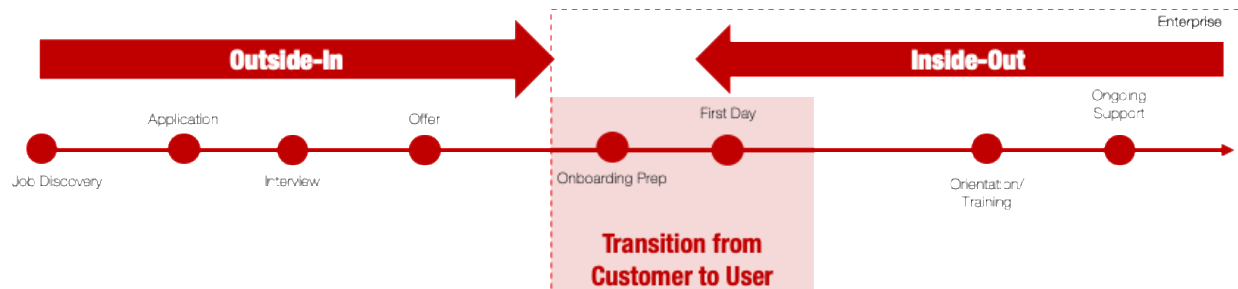


Figure 4 - Combining Outside-In and Inside-Out perspectives in Recruiting and Onboarding Services

Recruiting (Outside-In Perspective)

During recruiting, the potential employee is viewed as the customer, and the organization focuses on creating a positive experience to attract, engage, and secure talent. The organization's goal is to meet or exceed the expectations of the prospective employee through each interaction, ensuring a smooth and engaging process.

- **Job Discovery:** The organization should ensure that job postings are clear, compelling, and accessible to potential candidates.
- **Application:** The application should be straightforward, respectful of the candidate's time, and transparent about what to expect next.
- **Interview Experience:** The interviews should be well-organized, and the organization should communicate with candidates promptly and respectfully.
- **Offer Stage:** When extending an offer, the organization should present it in a manner that aligns with the candidate's expectations and negotiations, ensuring the process is seen as fair and transparent.

The goal during the recruiting phase is to attract the right talent by meeting the needs and expectations of the prospective employee, who is viewed as the customer.

Transition from Customer to User

Once the offer is accepted, the perspective shifts. The new employee, who was previously treated as a customer, is now considered a user of the organization's services. This transition is critical and needs to be handled smoothly to maintain a positive experience and ensure that the new hire feels supported and integrated into the organization.

- **Onboarding Preparation:** The organization shifts focus to preparing for the new hire's arrival. This includes IT setup, access provisioning, and orientation scheduling, which are now delivered as services to the user.
- **First Day Experience:** The employee's first day is a critical moment where the organization's service delivery (orientation, access to resources, introductions) reinforces the transition from candidate (customer) to employee (user).

Onboarding (Inside-Out Perspective)

Once the new employee starts, they are fully transitioned to a user. The organization now views the onboarding process from the inside-out perspective, focusing on delivering the necessary services to the employee to ensure they are equipped, informed, and integrated into the team.

- **Orientation and Training:** The organization delivers services that help the new employee understand their role, the company's culture, and how to succeed in their position.
- **Ongoing Support:** The organization provides continuous support and resources, including feedback and mentoring, to help the employee become fully productive.

Integration of Perspectives

To effectively combine these perspectives, the organization must ensure a seamless transition from recruiting to onboarding, recognizing the shift in roles for the new employee:

- **Seamless Handoff:** The handoff from recruitment to onboarding should be smooth, with all relevant information and expectations carried over, so the new employee doesn't feel any disruption or change in treatment.
- **Consistent Communication:** The organization should maintain consistent and supportive communication throughout the transition, making the new employee feel valued both as a candidate (customer) and as an employee (user).

- **Service Design:** The recruiting process should be designed with the outside-in perspective, focusing on attracting and engaging potential employees. The onboarding process should be designed with the inside-out perspective, ensuring that services provided to the new employee are efficient, effective, and aligned with their new role.
- **Feedback Loops:** After onboarding, gathering feedback from the new employee (now a user) helps improve both the recruiting and onboarding processes. This ensures that future candidates (customers) will have an even better experience, thus closing the loop between the outside-in and inside-out perspectives.

Combining these perspectives requires an understanding that while the customer and user perspectives differ, they are part of a continuous journey. Initially, the focus is on attracting and securing the right talent (customer perspective).

Once the individual is hired, the focus shifts to ensuring they are effectively integrated into the organization (user perspective). By carefully managing this transition and delivering consistent, high-quality services throughout, the organization can create a cohesive experience that supports both recruitment and onboarding goals.

Recruiting and Onboarding Example – USM and Systems Thinking

While CEM helps us understand the process from the perspective of the new hire, the Unified Service Management (USM) method adds a crucial layer of systems thinking to this approach. USM ensures that improvements to the recruiting and onboarding process are not only beneficial to new hires but are also sustainable, efficient, and aligned with the organization's overall strategy.

USM's systems thinking approach views the organization as an interconnected system of people, processes, and tools. Changes or improvements to one part of the system must be carefully analyzed to understand their impact on the entire system. This prevents the organization from making isolated changes that could inadvertently create inefficiencies or conflicts in other areas.

In the context of recruiting and onboarding, systems thinking ensures that any enhancements to these processes are aligned with the organization's broader objectives, do not create bottlenecks elsewhere, and contribute to overall operational effectiveness.

Recruiting and Onboarding as Services

USM begins by identifying recruiting and onboarding as services within the organization's broader service ecosystem. These services are interconnected with other functions, such as human resources, IT, facilities management, and departmental leadership.

Service Relationships

USM maps the relationships between these services, identifying dependencies and interactions. For example, the onboarding process might require collaboration between HR (for paperwork and orientation), IT (for setting up equipment and accounts), and department managers (for introducing team members and assigning initial tasks).

Procedure and Work Instruction Design

USM ensures that the procedures and work instructions for recruiting and onboarding are standardized and documented. These documents serve as templates that define how each

A standardized procedure might outline the steps for posting job listings, screening candidates, scheduling interviews, and extending job offers. Work instructions would provide detailed guidance on how to execute each of these steps, ensuring that all team members follow the same process.

step in the process should be carried out, ensuring consistency and efficiency.

Assessing Changes System-Wide

When CEM identifies a need for change, such as simplifying the application process to improve the candidate experience, USM's systems thinking requires an analysis of how this change will affect other parts of the organization. For instance, simplifying the application process might increase the volume of applications, which could impact HR's ability to screen candidates efficiently.

Mitigating Negative Impacts

USM ensures that any potential negative impacts are identified and mitigated. In this case, USM might suggest implementing automated tools for candidate screening or adjusting HR workloads to accommodate the increased volume.

Feedback and Iteration

USM integrates feedback loops into the recruiting and onboarding processes, allowing for continuous improvement. Feedback from new hires, hiring managers, and other stakeholders is systematically collected and analyzed.

If new hires report confusion during the onboarding process, USM ensures that this feedback is used to refine onboarding procedures and work instructions, ensuring that the process is continually optimized.

Strategic Integration

USM ensures that the recruiting and onboarding processes are aligned with the organization's broader strategic goals. For example, if the organization is focused on building a more diverse workforce, USM would ensure that recruiting and onboarding procedures are designed to attract and support diverse candidates.

This might involve revising job descriptions to be more inclusive, training interviewers on unconscious bias, and ensuring that onboarding materials are accessible to individuals with diverse backgrounds and needs.

USM's Role in Managing Change

One of the key strengths of USM is its ability to manage change systematically.

USM includes a formal change management process that governs how changes to recruiting and onboarding procedures are implemented. This process ensures that all changes are carefully planned, tested, and communicated to relevant stakeholders before being rolled out.

If a decision is made to introduce a new onboarding software platform, USM's change management process would ensure that IT is involved in the selection and implementation, HR is trained on the new system, and any potential disruptions to the onboarding process are minimized.

Maintaining Stability

USM ensures that the recruiting and onboarding processes remain stable and effective even during periods of change. This is achieved by maintaining a clear set of procedures and work instructions that can be easily adjusted as needed.

During a sudden increase in hiring (such as after a major funding round), USM ensures that the onboarding process can scale without sacrificing quality or efficiency.

USM's systems thinking approach provides the structure and discipline necessary to manage the recruiting and onboarding process as part of a broader service ecosystem. It ensures that improvements are not only beneficial to new hires but are also sustainable and aligned with the organization's overall strategy.

By combining USM with CEM, the organization can create a recruiting and onboarding process that is both customer-centric and operationally robust, delivering a positive experience for new hires while maintaining efficiency and effectiveness across the enterprise.

Chapter 5: Combining CEM and USM in the Enterprise

To achieve both comprehensive service management and high customer satisfaction, an enterprise can combine USM and CEM by first using USM to establish a robust service management framework and then applying CEM to refine and adapt these processes to better align with customer needs.

Use USM to define the basic structure and processes for all services. This includes setting up the AGREE, CHANGE, RESTORE, OPERATE, and IMPROVE processes, ensuring a consistent approach across the enterprise.

Apply CEM to each service individually, focusing on customer-specific needs. For instance, within the USM-defined CHANGE process, CEM might dictate how change requests are handled differently for various customer segments, customizing the workflow to match customer expectations.

Implement a feedback loop where CEM insights lead to adjustments in the USM processes. If customers express dissatisfaction with the speed of incident resolution, CEM can guide modifications in the RESTORE process, which is then standardized across the enterprise through USM.

A healthcare provider might use USM to manage its IT services, patient care services, and facility management under one unified framework.

However, when it comes to patient care services, CEM would be employed to adjust procedures based on patient feedback, ensuring that the service meets specific patient expectations, such as response time to emergencies or personalized care plans.

In this way, USM provides the backbone for service management, while CEM ensures that the services are fine-tuned to meet and exceed customer expectations.

Combining both methods enables an enterprise to manage services efficiently while remaining agile and responsive to customer needs.

Step-by-Step Integration

1. **Implement a Unified Management System Using USM** - Use USM to establish a standardized management system that governs all services, both internal and external. This system ensures that all services are managed using a consistent set of processes, allowing for efficient governance and continuous improvement.
2. **Optimize Business Processes with CEM** - Apply CEM to conduct detailed business process analysis for each service, focusing on the customer's perspective. For example, within the USM-defined OPERATE process, CEM might help refine the way IT support is provided to customers, ensuring the process is aligned with their expectations for response times and issue resolution.

- 3. Feedback Loop for Continuous Improvement** - Create a feedback loop where insights gained from CEM analysis are used to adjust the USM management system. If CEM analysis reveals that customers are dissatisfied with the speed of service delivery, this information can lead to adjustments in the USM processes, ensuring that the management system evolves to better meet customer needs.

Imagine a global financial services company that uses USM to manage both its internal services (such as IT and HR) and its external services (such as financial advisory and customer support). USM provides a unified framework that ensures all these services are managed consistently, whether they are being delivered to employees or customers.

Meanwhile, CEM is used to analyze and optimize specific business processes—such as the customer onboarding process in financial advisory—ensuring that these processes are tailored to meet customer expectations for speed, clarity, and support.

In this integrated approach, USM serves as the backbone for managing all services in a standardized way, while CEM ensures that each business process is optimized from the customer’s perspective. This combination allows the enterprise to manage its services effectively while continually improving customer satisfaction.

Establish the Management System First

If a customer tries to implement the Customer Expectation Management (CEM) method before establishing a Unified Service Management (USM) system, several challenges and inefficiencies may arise:

Lack of a Standardized Management Framework

Without USM’s standardized management system in place, the organization may lack a consistent approach to managing its services. This means that different services could be managed in varied, ad-hoc ways, leading to inconsistency, inefficiency, and difficulty in maintaining control over service quality.

Imagine a company that offers both IT support and HR services. Without USM, the IT department might use one method to track and resolve customer issues, while HR uses an entirely different system. This lack of standardization can result in confusion, duplicated efforts, and potential gaps in service delivery.

Difficulty in Applying Customer-Centric Optimization

CEM focuses on optimizing business processes from the customer's perspective. However, without a clear, standardized management framework, the organization may struggle to identify which processes need optimization and how to implement changes effectively.

A company might identify through CEM that its customer onboarding process is too slow. However, if there is no standardized process management in place (like the one provided by USM), it may be difficult to coordinate and implement the necessary changes across departments, leading to piecemeal improvements that don't fully address the underlying issues.

Increased Complexity and Fragmentation

Implementing CEM before USM can lead to increased complexity and fragmentation. CEM might drive changes in specific processes, but without a unified management system, these changes may not align with the overall goals of the organization or with other processes, leading to a disjointed service management approach.

If CEM-driven changes are made to improve customer interactions in one department, but other departments are not aligned due to the lack of a standardized management system, the customer experience could become inconsistent.

For instance, customer service might improve in one area but deteriorate in another, causing frustration and confusion for customers.

Limited Scalability and Sustainability

While CEM might yield short-term improvements in customer satisfaction, these improvements may not be sustainable or scalable without the foundation of a USM-based management system. USM provides the necessary structure to ensure that improvements are consistently applied across all services and can be scaled as the organization grows.

An organization might successfully optimize its customer support process through CEM, but as the company expands and adds new services, the lack of a unified management system could lead to difficulties in scaling these improvements.

Without USM, each new service might require a separate CEM analysis and process optimization, leading to inefficiency and duplication of effort.

Missed Opportunities for Holistic Improvement

CEM focuses on individual processes from the customer's perspective, but without USM's overarching management framework, opportunities for holistic improvement across the organization might be missed.

An organization might optimize its customer-facing processes through CEM, but without USM, it may overlook internal processes that indirectly impact customer satisfaction, such as service delivery coordination or resource allocation. This could result in improvements that are effective in isolation but do not fully enhance the overall customer experience.

USM allows for systemic improvements that affect all services, while CEM can be used to fine-tune specific processes within this structure.

Implementing CEM before USM is akin to fine-tuning individual components of a machine without first ensuring that the machine itself is well-constructed and functioning properly. Without USM's standardized management system, the benefits of CEM may be limited, unsustainable, and difficult to scale.

By first establishing a USM framework, organizations can create a strong foundation for managing all services consistently, after which CEM can be effectively applied to optimize processes in a way that aligns with both the management system and customer expectations.

USM Deployment – Bottom-Up or Top-Down?

To create a well-rounded service management approach that benefits both the enterprise and its customers, an organization can combine USM and CEM by first leveraging USM to build a robust management system for all services and then using CEM to optimize business processes based on customer feedback and expectations.

When integrating the Unified Service Management (USM) method with the Customer Expectation Management (CEM) method in an enterprise, it's crucial to understand the common dynamics around how these methods are deployed and the rationale behind them.

Bottom-Up Deployment of USM: The Reality and Rationale

In many enterprises, the deployment of USM often begins from the bottom up. This bottom-up approach usually starts within specific departments or teams, such as IT, HR, or customer service, where there is an immediate need to standardize and optimize service management processes.

Immediate Pain Points - Teams or departments might be facing challenges like inconsistent service delivery, unclear roles and responsibilities, or inefficient processes. These pain points make them prime candidates for adopting USM to bring structure and standardization.

Local Autonomy and Experimentation - Individual teams often have the autonomy to implement changes within their own scope. They can experiment with USM's processes and workflows to see how it improves their operations before a larger-scale rollout.

Gradual Adoption and Learning - A bottom-up approach allows teams to gradually adopt and learn USM's principles, tailoring them to their specific needs before advocating for broader adoption across the enterprise.

Moving to a Top-Down Deployment: A Strategic Shift

While bottom-up deployment is common, the ultimate goal is often to achieve a top-down deployment, where USM is embraced as an enterprise-wide service management system. Moving to a top-down approach involves gaining executive support and integrating USM into the organization's strategic framework.

Demonstrating Success - As bottom-up implementations yield positive results, these successes can be documented and presented to senior management. Demonstrating how USM has improved efficiency, reduced costs, and enhanced service quality can build a compelling case for broader adoption.

Gaining Executive Buy-In - To move to a top-down deployment, it's essential to secure executive sponsorship. This involves aligning USM with the organization's strategic objectives, such as improving customer satisfaction, driving digital transformation, or achieving operational excellence.

Building a Governance Structure - Establishing a governance structure for USM ensures that its principles are consistently applied across the organization. This structure might include a central USM team responsible for overseeing implementation, providing training, and ensuring compliance with USM standards.

The Role of CEM in Accelerating USM Awareness

The Customer Expectation Management (CEM) method, with its focus on customer experience and outside-in thinking, can play a crucial role in accelerating the awareness of the need for a USM-based service management system.

Highlighting Gaps in Service Delivery - CEM's customer-focused approach often uncovers gaps and inefficiencies in service delivery that are directly linked to inconsistent or poorly managed processes. These gaps can highlight the need for a standardized service management system like USM.

Linking Customer Expectations to Operational Efficiency - CEM helps the organization understand how meeting customer expectations is not just about front-end improvements

but also about having robust back-end processes. USM provides the structure needed to ensure that these back-end processes are consistent and efficient, supporting the delivery of a superior customer experience.

Creating a Sense of Urgency - By focusing on the customer experience, CEM can create a sense of urgency around the need for improvement. This urgency can be a powerful catalyst for adopting USM more broadly, as it makes clear that without a systematic approach to service management, the organization risks failing to meet customer expectations.

Integrating USM and CEM within an enterprise requires a careful balance of bottom-up and top-down strategies. While USM often begins with grassroots implementation, the goal is to scale it across the organization through top-down support. CEM, with its focus on customer experience, can accelerate the awareness and adoption of USM by highlighting the need for a standardized, systems-driven approach to service management.

By leveraging CEM to uncover customer-driven needs and using USM to address those needs with a robust service management system, organizations can ensure that they not only meet customer expectations but also achieve long-term operational excellence. This synergistic approach ensures that improvements are both customer-centric and systematically sustainable, driving value for the organization as a whole.

Chapter 6: Challenges with Practice Guidance

While practice frameworks like ITIL, COBIT, and ISO20000 are valuable for addressing specific requirements within an organization, they often fall short when it comes to establishing a unified service management system across an enterprise. In fact, relying heavily on multiple practice frameworks can inadvertently hinder the creation of an integrated, enterprise-wide service management system.

Recognizing Challenges with Good Practice

Fragmentation of Processes and Practices

Each practice framework is designed with a specific focus, be it IT Service Management (i.e., ITIL), governance (i.e., COBIT), or quality management (i.e., ISO). When an organization adopts multiple practice frameworks, it often leads to the fragmentation of processes and practices. Different departments might follow different guidelines, creating silos within the organization.

An IT department might follow ITIL practices for incident management, while the HR department adheres to ISO standards for quality management. This can result in inconsistent processes across the organization, making it difficult to achieve a unified approach to service management.

Complexity and Redundancy

The application of multiple practice frameworks can introduce unnecessary complexity and redundancy. Each framework comes with its own set of processes, terminologies, and best practices, which can overlap or even conflict with one another. This not only complicates the management of services but also makes it challenging to integrate these frameworks into a cohesive system.

If an organization tries to simultaneously implement ITIL for IT services, COBIT for governance, and Lean Six Sigma for process improvement, it may end up with overlapping processes for change management, each with different terminologies and metrics. This redundancy can confuse staff and dilute the effectiveness of the service management system.

Lack of a Standardized, Holistic Approach

Practice frameworks are typically prescriptive, offering detailed guidance on how to perform specific tasks or manage particular processes. While this can be beneficial for meeting specific requirements, it does not provide a standardized, holistic approach to service

management across the entire enterprise. As a result, the organization may struggle to align its service management efforts with its overall business objectives.

Inhibition of Systems Thinking

Systems thinking involves understanding how different parts of an organization interact and contribute to the whole. Practice frameworks tend to focus on specific functions or processes, which can lead to a narrow view of service management. This focus inhibits the ability to see the bigger picture and understand how changes in one area impact the entire service management system.

Implementing ITIL's service transition practices in isolation might improve change management in IT, but without considering how these changes affect HR, finance, or customer service, the organization risks creating bottlenecks or inefficiencies elsewhere.

Difficulty in Achieving Enterprise-Wide Consistency

When different departments or teams follow different practice frameworks, it becomes challenging to maintain consistency across the enterprise. This lack of consistency can lead to varying levels of service quality, making it difficult to deliver a unified customer experience or achieve strategic business goals.

Table 1 summarizes how some popular practice guidance relates to the USM method, and USM's perspective on this guidance.

The USM method integrates the best practices of these techniques into a cohesive structure, allowing organizations to manage services efficiently. This provides the flexibility for organizations to limit the level of detail (and complexity) as appropriate for their needs and abilities.

The key difference is that while techniques like Value Stream Mapping, Business Process Mapping, and Customer Journey Mapping often require customization for each service or process, USM provides a universal template that can be applied across all services, ensuring consistency and reducing the need for extensive re-engineering.

Practice, Technique, and/or Guidance	Relationship to the Unified Service Management (USM) method	USM Perspective of Practice, Technique, and/or Guidance
Business Process Mapping (BPM)	<p>BPM, like the USM method, emphasizes documenting and understanding processes. However, while BPM can be broad and detailed, the USM method simplifies this by using a non-redundant process model that applies universally across all services. USM's process standardization allows for streamlined management without the need for extensive mapping of every individual process variation.</p>	<p>In USM, the core processes (AGREE, CHANGE, RESTORE, OPERATE, IMPROVE) are already standardized, reducing the need for complex BPM efforts. BPM in a USM context would focus more on documenting specific procedures or work instructions derived from these core processes.</p>
Customer Journey Mapping	<p>CJM's customer-centric approach aligns well with USM's emphasis on managing services to meet customer needs. However, while CJM focuses on mapping the customer's emotional and experiential journey, USM focuses on ensuring that the core processes consistently deliver value to the customer.</p>	<p>The USM method would integrate insights from CJM into the design and management of services, ensuring that processes such as AGREE (Contract Management) and RESTORE (Incident Management) directly address customer expectations and experiences.</p>
Lean Six Sigma	<p>Lean Six Sigma's focus on process efficiency, waste reduction, and continuous improvement complements USM's principles. However, USM simplifies the process by providing a standardized framework, reducing the need for the extensive customization and statistical analysis often required in Lean Six Sigma.</p>	<p>USM provides a streamlined approach where continuous improvement (IMPROVE process) is built into the management system. Lean Six Sigma techniques can be applied within the USM framework for specific improvements, but the overall structure of USM remains consistent and universal.</p>
Service Blueprinting	<p>Service Blueprinting's holistic view of service interactions is similar to USM's approach to managing services end-to-end. USM's standardized workflows ensure that every aspect of service delivery is managed consistently, which can be seen as a simplified form of blueprinting.</p>	<p>In USM, Service Blueprinting might be used to visualize the specific service interfaces and support processes, but USM's standardized process model ensures that these interactions are managed efficiently and consistently across all services.</p>

Kaizen	Kaizen’s philosophy of continuous improvement aligns with USM’s IMPROVE process, which emphasizes ongoing enhancement of services. USM incorporates the Kaizen mindset into its process model, encouraging incremental improvements without disrupting the standardized framework.	Kaizen can be integrated into the daily operations managed by USM, where small, continuous improvements are made within the context of the standardized processes, ensuring that improvements do not compromise the consistency and simplicity of the overall management system.
Total Quality Management (TQM)	TQM’s comprehensive approach to quality and customer satisfaction is reflected in USM’s design, which aims to deliver high-quality services consistently. However, USM simplifies the implementation of TQM principles by providing a clear, standardized process model that applies universally.	USM could be seen as a practical implementation of TQM in the context of service management, where the focus is on maintaining high-quality service delivery through standardized, non-redundant processes that are easy to manage and adapt.
Value Stream Mapping (VSM)	VSM’s focus on process efficiency and flow optimization resonates with USM’s objective to streamline service management. However, USM achieves this efficiency through its standardized process model rather than through detailed mapping of each value stream.	VSM might be used within USM for specific process improvements, but the need for VSM is reduced because USM already provides a lean and efficient framework. The standardized processes in USM ensure that waste is minimized and efficiency is maximized without extensive mapping efforts.

Table 1 - USM and Practice Guidance

Chapter 7: Why Customers Should Start with USM

Given these challenges, organizations should consider starting with the Unified Service Management (USM) method and establish a service management system. USM provides a standardized, non-redundant process model and set of workflows that apply universally across all services, regardless of the specific practice frameworks in use.

USM offers a holistic approach to service management, ensuring that all services within the organization are managed consistently and effectively. By starting with USM, organizations can create a unified service management system that aligns with their strategic objectives and supports all business functions.

Getting to the Heart of Service Management

Simplifying the Integration of Practice Frameworks

Once USM is in place, practice frameworks can be integrated as needed to address specific requirements. However, these frameworks are applied at the procedure or work instruction level, ensuring that they enhance rather than fragment the unified service management system.

Facilitating Systems Thinking and Continuous Improvement

USM encourages systems thinking by providing a clear, overarching structure for service management. This structure allows the organization to see how different processes interact and impact each other, enabling holistic analysis and continuous improvement.

Ensuring Enterprise-Wide Consistency

By starting with USM, organizations can achieve enterprise-wide consistency in service management. This consistency not only improves operational efficiency but also enhances the customer experience by ensuring that all services are delivered at the same high standard.

While practice frameworks are valuable for addressing specific needs, they are not sufficient for establishing a unified service management system. The application of multiple frameworks can lead to fragmentation, complexity, and inconsistency, inhibiting the organization's ability to manage services holistically.

Starting with USM provides a standardized foundation for service management, enabling organizations to integrate practice frameworks as needed while maintaining a unified

approach that supports systems thinking and continuous improvement. This approach not only simplifies service management but also ensures that the organization is well-equipped to meet its strategic objectives and deliver a consistent, high-quality customer experience.

USM sits in the middle of the business capability iceberg. It bridges the journey from desired customer outcomes and operations by defining services as supported facilities and sits in the middle of the process hierarchy as well.

This is what makes me refer to USM as the 'heart' of enterprise service management. It connects the strategic with the operational, ensuring that an organization's service management system is not just a collection of processes and tools, but a living, breathing entity that drives continuous improvement and delivers real value.

The quality experience of the customer is mainly based on expectations, which arise from the communication with the provider. In practice, these expectations can have more influence on the perceived quality than the actual technical quality of the services. Quality perception - the customer's experience of the service - is therefore a crucial factor in the customer-provider relationship.

The Customer Expectation Management method can be used to ensure that your service management's "heart" is in the right place.

For More Information

It was not the purpose of this eBook to provide detailed information about the Unified Service Management (USM) method or the Customer Expectation Management (CEM) method. Here's where you can get additional information:

Unified Service Management (USM) method

The Unified Service Management (USM) method is supported by the non-profit SURVUZ Foundation. The SURVUZ Foundation supports user organizations with free resources.

SURVUZ also supports coaches, trainers, and product suppliers with free resources, so they can support customers that use USM. And SURVUZ invests in the future by providing educational institutions with a free learning environment for their teachers and students.

More information about the USM method can be found on the [USM Portal](#) and/or the [USM Wiki](#), including formal certification training. In addition, the [Rolling Uphill YouTube Channel](#) has free videos explaining the USM method.

Customer Expectation Management (CEM) method

The Customer Expectation Management (CEM) method was formerly supported by the non-profit International Process and Performance Institute (IPAPI). The Certified Process Professional (CPP), Certified Process Manager (CPM), and Certified Process Director (CPD) programs and related content are now available under a creative commons license.

The Customer Expectation Management (CEM) method, originally described by Terry Schurter and Steve Towers, has significantly evolved over the years to become what is now known as CEMMethod v15. This evolution reflects the method's adaptation to changing business environments, customer expectations, and advancements in technology.

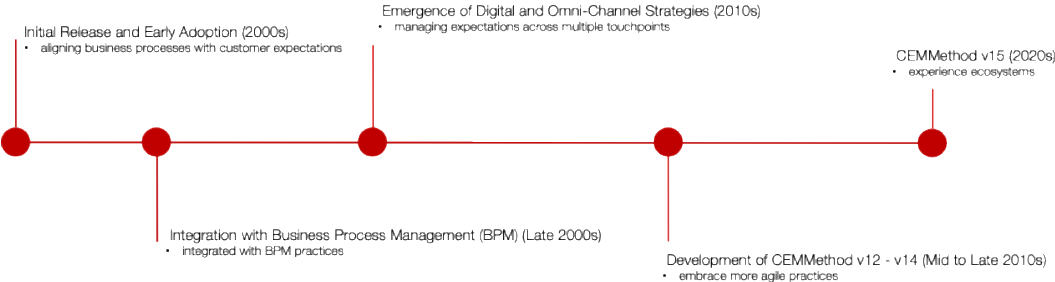


Figure 5 - Evolution of CEM

- Initial Release and Early Adoption (2000s) - The initial release of the CEM method, as documented by Terry Schurter and Steve Towers, focused on managing customer expectations to enhance customer satisfaction and loyalty. This is available under a Creative Commons license.

Future versions and certification training are available through the BP Group at www.bpgroup.org

- Integration with Business Process Management (BPM) (Late 2000s) - CEM was increasingly integrated with BPM practices, emphasizing the importance of process optimization in managing customer expectations.
- Emergence of Digital and Omni-Channel Strategies (2010s) - With the rise of digital channels and omni-channel customer experiences, CEM evolved to include strategies for managing expectations across multiple touchpoints, including online, mobile, and social media platforms.
- Development of CEMMethod v12 - v14 (Mid to Late 2010s) -CEM began to embrace more agile practices, allowing organizations to quickly respond to changing customer needs and market conditions.
- CEMMethod v15 (2020s) - CEMMethod v15 emphasizes the management of entire experience ecosystems, recognizing that customer expectations are influenced by a wide range of factors, including brand perception, market dynamics, and social influences.

Contact the author for more details on how to get additional information and content on either USM or CEM.

Epilogue

As someone who's been fascinated with continual improvement since the TQM days of the late 1970's and early 1980's, I can safely say this has been a savage journey. I continue to be fascinated with the nature of the improvement beast.

"No matter how old you are, when you begin to learn about 'quality' and 'improvement' you find that there is a LOT of information available, and much of it is based on those who came before. Some of these people have been pushing the improvement ball uphill for a very long time...others not so much.

There have been multiple instances where one 'expert' or another took something, 'improved it', and re-published it as new thinking. This sometimes creates friction between authors and confusion around who exactly is an 'authoritative source'.

This is the nature of the beast.

What's different with the 'nature of the beast' today is the speed and ease of which improvements to proven techniques can be duplicated --- and monetized --- by the community. Food for thought as you race along the digital turning point and its related disruption."

- John Worthington, Rolling Uphill

In today's fast-paced world of digital transformation and disruption, it's easy to get caught up in the allure of the latest trends and innovations. However, it's important to remember that there is a wealth of proven guidance available, often very affordable or even free, that customers can leverage to achieve significant improvements.

Not every shiny new thing is as effective as it seems, and sometimes the most impactful solutions are rooted in 'old lessons' that have stood the test of time. These tried-and-true methods are often right in front of us, waiting to be utilized for real, sustainable progress.

About the Author



John Worthington has had a 40-year IT career with more than two decades dedicated to service management.

He's had multiple certifications along his journey including being an ITIL Expert (v3), and an XLA Master, and is now a **Certified USM Coach**.

He is also an Authorized Affiliate of BeingFirst, helping change leaders evolve human systems and performance through a Conscious Change Leadership approach.

You can read more about John and his particular journey by getting the book, **Rolling Uphill**. ([Click here to download](#)) or visiting his [LinkedIn Profile](#).

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