

PinkVERIFY™ V3.1

IT SERVICE MANAGEMENT TOOL ASSESSMENT

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1 PinkVERIFY

1.1 Executive Summary

IT Service Management (ITSM) is focused on maintaining a reliable, stable, cost-effective IT infrastructure which enables and supports the business' services and processes. Similarly, the IT department is focused on moving from a technology provider to a service provider and business partner.

More organizations are adopting the IT Infrastructure Library (ITIL®) because it facilitates the integration of Business Service Management and ITSM principles' best and good practices.

In the world of ITSM support tools, a trend can be observed where single process Help Desk applications and systems management tools are being replaced by more complex Service Desk and integrated service management tool suites. To support this shift, tool vendors are developing integrated platforms, products and services to align people, process and technology based on ITIL processes.

As a result, in 1991 Pink Elephant developed PinkVERIFY, an ITIL software tool assessment service, to assist:

- The software vendor community develop and market tools which enable and support ITIL terminology, processes, workflows and integration
- The software customer community select enterprise software by providing a list of vendors and tools that support ITIL functionality and integration

In early 2009, APM Group (APMG) announced the ITIL Software Scheme (ISS). The ISS provides vendors with the opportunity to have their product assessed as compliant to specific criteria and thereby recognized through a new logo – the ITIL *swirl* logo – promoted by AMPG and the Office of Government Commerce (OGC). In September 2009, Pink Elephant was officially announced as a Licensed Software Assessor (LSA).

As an LSA, Pink Elephant uses its qualified and experienced IT management consultants to assess tools and services according to the published criteria. Software assessments conducted by Pink Elephant are situations where criteria for the ISS and PinkVERIFY are both included; the PinkVERIFY assessment includes additional criteria not covered by the ISS. If the tool meets the criteria, a vendor can display the PinkVERIFY and/or ITIL *swirl* logo(s) on its product packaging and depending on which criteria have passed.



1.2 What Is PinkVERIFY?

PinkVERIFY is an objective software tool assessment service. The service validates toolsets that meet a set of functional requirements as defined by ITIL best practices. Software vendors can use the service to obtain the PinkVERIFY logo to indicate a tool's compatibility with ITIL.

A tool is assessed according to process platform, core and integration criteria which align with ITIL terminology, processes, workflows and integrations. As of November 2009, the PinkVERIFY assessment includes OGC ISS standard process criteria. This development allows tool vendors to obtain the PinkVERIFY logo as well as the OGC's ITIL *swirl* logo at the bronze level. There are three levels of ITIL *swirl* logo: gold, silver and bronze.

The PinkVERIFY assessment criteria are based on several sources of industry knowledge and experience:

- High level tool requirements documented in ITIL and other publications from the TSO
- Practitioner input
- Software vendor input
- Pink Elephant's own consulting experience
- OGC ISS criteria

Tools achieving the PinkVERIFY logo and/or the ITIL *swirl* logo are identified on Pink Elephant's PinkVERIFY [webpage](#).

Other resources available on the webpage include a PinkVERIFY overview presentation and PinkVERIFY process criteria documents.



1.3 How To Obtain A PinkVERIFY Or OGC ITIL Swirl Logo

Vendors wishing to obtain the PinkVERIFY or OGC ITIL *swirl* logo should follow this process:

1. Voluntarily contact Pink Elephant at 1-888-273-PINK.
2. A Pink Elephant consultant reviews the assessment process and provides soft copies of the requested process criteria descriptions, depending on whether a vendor wants an assessment for the PinkVERIFY logo, the OGC ITIL *swirl* logo or both.
3. A vendor moves forward by signing a statement of work (SOW).
4. The vendor completes a process criteria self-assessment.
5. The consultant reviews the completed process criteria descriptions and facilitates the process assessment. The consultant also schedules a date for a vendor tool demonstration. The consultant notifies APMG if a vendor wants ISS certification.
6. Once the tool demonstration is complete, the consultant confirms the processes for which the tool meets or exceeds the published criteria. The consultant also confirms the processes for which there are gaps requiring improvement and re-assessment. Finally, the consultant documents requirements for the silver and gold OGC ITIL *swirl* logos and liaises with APMG.
7. Once a toolset achieves a PinkVERIFY logo, the vendor signs a license agreement and the tool is listed on the PinkVERIFY webpage. The vendor can use the PinkVERIFY logo for 24 months after which it must sign a new license agreement.
8. Once a toolset achieves an OGC ITIL *swirl* logo, the vendor signs a license agreement with APMG. The vendor, tool, version and level of OGC ITIL *swirl* is posted on the PinkVERIFY webpage.
9. If a vendor releases a new tool version, the tool must be reassessed to ensure continued compatibility with the ITIL processes.

For a detailed explanation of the assessment process and pricing, please refer to Section 3.1 of this paper.



1.4 Tips For A Successful Assessment

1. Pink Elephant recommends that vendor sales personnel and development staff take *ITIL Foundations* training at a minimum.
2. Complete the general platform criteria documentation once. The first section of each process covers general platform criteria and is the same for every process and only requires completion once – unless there are capabilities for a specific process that need identification.
3. Prepare the demonstration: Build in examples of business services in addition to IT services; describe and demonstrate automation (if applicable) for each criteria or link to *help* documentation and files for each criteria. It is important that the demonstration be developed based on general public available functionality and not be developed as a custom configuration of the tool developed specifically to pass a PinkVERIFY assessment.



2 SERVICE SCOPE

In 1999, PinkVERIFY entered the market as an assessment of Help Desk tools against Incident, Problem, Change and Configuration Management. At that time, only a few of the major service management suites boasted the ability to meet the integration requirements suggested by the ITIL framework.

In the years since, the industry has aggressively moved towards a focus on ITSM. There are now numerous tools and services which meet the needs of practitioners operating in an ITSM-focused environment.

Pink Elephant added processes to the PinkVERIFY assessment as options for those tools whose functionality had expanded beyond Incident, Problem, Change and Service Asset & Configuration Management. PinkVERIFY Enhanced meant that a specific tool was improved to include one of the following processes as a capability:

- Availability Management
- Release & Deployment Management
- Service Level Management

To reflect industry growth and the evolution of the ITIL V3 Service Lifecycle approach, the PinkVERIFY scope expanded in 2008 to include the following 14 ITIL V3 processes:

- Incident Management
- Problem Management
- Event Management
- Request Fulfillment
- Change Management
- Service Asset & Configuration Management
- Knowledge Management
- Service Portfolio Management
- Service Level Management
- Financial Management
- Service Catalog Management
- Availability Management
- Capacity Management
- Release & Deployment Management

In November 2009, PinkVERIFY V3.1 scope was expanded to include:

- All requirements for the OGC ITIL Software Assessment Scheme (ISS)
- ITIL process IT Service Continuity Management



PinkVERIFY V3.1 IT Service Management Tool Assessment White Paper

The scope of PinkVERIFY V3.1 processes will continue to expand in 2010 to include the remaining 9 ITIL V3 processes to fully align with APMG's approved process criteria.



2.1 Logos

PinkVERIFY Logo



As part of the PinkVERIFY V3.1 service, a toolset is licensed to use a PinkVERIFY logo to indicate it was successfully assessed against one or several processes described within the PinkVERIFY service scope.

To view which processes a tool was verified against, visit the PinkVERIFY [webpage](#).

OGC ITIL *Swirl* Logos



The OGC ITIL *swirl* logos reflect bronze, silver or gold levels for each process based on the following APMG criteria:

- Bronze: The tool and process have passed the assessment, but has not been purchased by one to two customers.
- Silver: The tool and process have at least three *in production* customers. Proof of product order is required on the customer's letter head. The documentation must state the tool and process is deployed in production and is in accordance with ITIL.
- Gold: The tool has a least three *in production* customers that have a) implemented the tool, b) are using the tool, and c) are happy to reference that they are using the tool to automate the assessed process in accordance with ITIL. Proof of implementation is required on the customer's letter head. Documentation just reference the tool version, the ITIL processes for which the tool is supporting and one piece of user evidence such as a screen shot or report.



3 SERVICE DESCRIPTION

PinkVERIFY is a service that assesses and evaluates software tools and services in accordance with ITIL V2 and V3 process objectives, activities and workflows. Successfully verified tools are listed on Pink Elephant's website with the PinkVERIFY logo and, if applicable, the OGC ITIL *swirl* logo for marketing purposes.

To use the logos, a specific version of a tool must undergo a successful assessment by a qualified Pink Elephant consultant and meet the platform, core and integration requirements for a specific process within the PinkVERIFY scope.

PinkVERIFY serves two distinct markets:

Market	Description
Software Vendor Community	<p>Vendors seek PinkVERIFY to differentiate themselves in an increasingly competitive software market. Appearing on the list of verified products on Pink Elephant's website offers an objective and independent validation of a tool's capability to support the ITIL framework.</p> <p>Tool vendors can request a qualified Pink Elephant consultant to assess the product against the published criteria. If the tool meets the criteria, the vendor signs a trademark license agreement for the use of the PinkVERIFY logo and, if applicable, the OGC ITIL <i>swirl</i> logo to promote a tool's status in various product marketing vehicles. In addition, the vendor is listed on Pink Elephant's PinkVERIFY webpage.</p> <p>The license agreements are valid for two years and can be renewed with confirmation that brand use was maintained for the tool version and assessed processes. Each distinct tool or service and version number requires a separate license agreement to receive verification.</p>



Software Customer Community	<p>As recognition for IT best practices, including ITIL, increases, practitioners seek an easy way to identify tools that support their needs. PinkVERIFY meets this need.</p> <p>PinkVERIFY offers an objective, ITIL V3-based set of criteria to assess tools. It also provides a list of vendors, verified tools and processes. Those tools are listed as meeting documented functional requirements.</p> <p>PinkVERIFY validates that high level ITIL requirements were met; however, it does not provide a maturity model as to how well the product can meet the requirements. To use an analogy: the service provides a comfort level that the car has four doors and four wheels and is safe; however, the owner needs to examine the vendor in question to decide whether he or she needs a compact or luxury vehicle and whether specific optional features are required.</p>
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3.1 Process Phases & Pricing

Phase I	Criteria Documentation <p>A vendor determines the processes for which the tool is assessed and whether the tool is assessed with PinkVERIFY criteria, ISS criteria or both. See section 2.1 or ISS website for details.</p> <p>The vendor completes the self assessment criteria documents. Tools not meeting the general, core, and integration criteria should be improved to close known gaps before proceeding with any assessment. See section 3.2: Scoring Model.</p> <p>Vendors provide answers to questions and provide a description of how the tool meets the requirements. Vendors may also include supporting documentation such as screenshots or reports to support their answers. If a tool appears to meet the criteria requirements, it qualifies to move to phase II.</p> <p>To proceed to phase II, vendors email completed criteria documents to Lisa Lyons at l.lyons@pinkelephant.com.</p> <p>There are no fees for phase I.</p>
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Phase II	Demonstration <p>Pink Elephant will provide a vendor with a PinkVERIFY phase II SOW.</p> <p>A Pink Elephant consultant will schedule an online tool demonstration with the vendor. The vendor will schedule, host, and conduct a session to demonstrate how the tool satisfies the functionality, workflows, and, if applicable, automation and documentation requirements as specified by the PinkVERIFY and ISS criteria for the processes for which the tool is assessed.</p> <p>The Pink Elephant consultant notifies APMG that an assessment is scheduled and provides documentation of the vendor’s contact information, tool name and version, processes for assessment and the ISS certification level for the processes under assessment.</p> <p>To advance to phase III, a tool must pass either the PinkVERIFY and/or the ISS assessment for at least one process. To pass a PinkVERIFY process assessment, a tool must meet 100% of the general, core and integration criteria for that process. To pass the ISS assessment for a process, a tool must achieve a passing score for questions covering the minimum ITIL criteria. See section 3.2: Scoring Model.</p> <p>If the necessary criteria are not met and additional tool development or configuration is required to pass the assessment, the vendor is allowed to request an additional demonstration at a later date.</p> <p>The fee for phase II is US\$2,500 per day. A vendor can demonstrate up to three processes in one day. The vendor is invoiced for the number of days it takes to complete the demonstration for the number of requested processes.</p> <p>Note: Time spent on additional demonstrations is billable.</p>
Phase III	Trademark License Agreements PinkVERIFY Certification <p>Pink Elephant prepares and executes a phase III SOW and license agreement covering all the processes for which the tool was assessed for 24 months.</p> <p>A contact from Pink Elephant’s Marketing department will reach out to the vendor to obtain the organization’s logo and the URL. This information is posted on the PinkVERIFY webpage along with details identifying the tool, version and processes certified.</p>



	<p>Pink Elephant will also provide the vendor with the PinkVERIFY logo, logo guidelines and an official letter confirming PinkVERIFY status.</p> <p>There is no fee for phase III.</p> <p>ISS Certification</p> <p>If a vendor wants to achieve OGC ITIL <i>swirl</i> certification at a silver or gold level, the Pink Elephant consultant will require the vendor to provide a) customer contact information, b) documented evidence confirming the tool purchase, c) evidence that the tool meets the documented criteria for each ITIL process it's measured against, and d) evidence that the tool has achieved a passing score against the ISS process assessment criteria.</p> <p>When required by the ISS certification criteria, Pink Elephant will obtain confirming evidence directly from the vendor's customers.</p> <p>Pink Elephant sends the scoring results and ISS certification verification to APMG along with a recommendation as to whether the tool can receive bronze, silver or gold level certification.</p> <p>Pink Elephant connects the vendor and APMG for licensing purposes. The vendor, tool, processes and OGC certification levels are listed on OGC's website.</p> <p>Pink Elephant lists the vendor, tool, processes and OGC certification levels on the PinkVERIFY webpage once the vendor and APMG complete the trademark licensing phase.</p> <p>Pink Elephant does not charge for collecting and confirming evidence of tool deployment.</p> <p>APMG charges a fee of £200 per process, per level, per license term for the trademark licensing agreement and OGC ITIL <i>swirl</i> logos.</p>
<p>Renewal Phase</p>	<p>The PinkVERIFY V3.1 trademark license agreement is valid for 24 months. Vendors can apply for a renewal when the trademark expires if the tool has not changed. Pink Elephant is responsible for emailing the vendor a renewal reminder three months prior to the expiry date.</p> <p>There is no Pink Elephant renewal fee.</p> <p>.</p> <p>The OGC trademark license agreements are valid for 24 months. A vendor can</p>



	<p>apply for a renewal directly to APMG if the tool version has not changed.</p> <p>APMG charges a renewal fee of £200 per process, per level, per license term.</p>
Version Changes	<p>The PinkVERIFY V3.1 trademark license agreement is valid for 24 months for the tool version originally verified. A separate agreement is required for each tool version. Version changes, as well as full releases, require re-assessment.</p> <p>The OGC ITIL <i>swirl</i> license agreement is valid for 24 months for the tool version originally assessed. Vendors can submit up to four delta releases of a tool within the term, provided:</p> <ul style="list-style-type: none">• They approach the same organization that facilitated the original assessment to ensure knowledge of the tool, process and documentation is retained• They detail the tool changes that constitute another release• They prove that the delta changes have had no negative impact on the ITIL components within the tool for the processes assessed• Executive signatures accompany the proof with examples where required <p>The assessor reviews the changes and proof to ensure the above conditions were met and no full re-assessment is required. Vendors must ensure that any delta approvals are shown against their OGC ITIL <i>swirl</i> trademark.</p> <p>Tool releases above the four delta releases – or those that do not meet the above conditions within the four delta releases – are subject to full re-assessment and re-licensing.</p>

NOTES:

1. The tool and processes being assessed must represent a commercially available, standard *out of box* configuration and is not modified specifically to meet the assessment criteria.
2. In addition to functionality, the PinkVERIFY assessment reviews the tool’s use of terminology as defined in the official [ITIL glossary](#) as well as functionality automation and help documentation, as applicable, for each process criteria.
3. If the tool is sold in more than one language, the vendor must demonstrate that approved definitions were used to ensure the translated version matches compatibility criteria.
4. Each tool requires a separate license agreement. If a vendor has one tool branded differently in different markets, each separate product name requires a separate license agreement



3.2 Scoring

PinkVERIFY criteria are separated into three groups:

1. **General:** Basic tool platform requirements
2. **Core:** Primary core process requirements
3. **Integration:** Integration with other process requirements

To achieve PinkVERIFY certification for a specific process, a vendor must demonstrate that 100% of the general, core and integration criteria was met.

To obtain ISS certification, a tool must achieve:

- An overall 70% or higher passing score
- A 70% or higher passing score against the functionality of the ISS assessment criteria
- A 70% or higher passing score against applicable automation and help documentation for each criteria
- A 70% or higher passing score for additional value-add criteria
- Also as noted, additional evidence of tool and process purchase and deployment are required for OGC gold and silver process compliance logos

Integration With Third Party Or External Tools

PinkVERIFY certification requires that all general and core criteria are fulfilled by *out-of-box* or standard functionality within a tool owned by the software vendor. However, the tool can satisfy the PinkVERIFY integration criteria by demonstrating the functionality within the assessed product or through integration with third party tools via vendor-supplied interfaces/middleware for workflow and data exchange.



4 APPENDIX I

Additional Notes About PinkVERIFY & OGC ITIL Swirl

- PinkVERIFY and OGC assessments are conducted via a real-time vendor-hosted web-based screen sharing demonstration
- Pink Elephant can verify up to three processes in one work day
- Pink Elephant expects a vendor to demonstrate that its tool supports PinkVERIFY criteria as part of a standard commercial offering
- Pink Elephant confirms with the vendor the processes for which the tool should be assessed, the level of OGC ITIL *swirl* the vendor seeks and the requirements associated with the bronze, silver and gold levels
- Pink Elephant guides the demonstration through each process criterion asking the vendor to illustrate: a) how the tool satisfies each criterion; b) the automation of the work associated with the criterion (if applicable); and c) the documentation that supports the tool's user *help* features associated with the criterion. All three points are scored
- Pink Elephant, under the terms of the LSA agreement, does not provide the vendor with the total score for the ISS assessment. Rather, Pink Elephant will inform the vendor of specific areas that need improvement throughout the demonstration and in the final assessment wrap up
- For PinkVERIFY assessments, pass or fail results for each criterion are presented and discussed with the vendor. This enables the vendor to identify areas of improvement to achieve PinkVERIFY status should the tool fail initially.
- If the vendor passes the ISS assessment and aspires to silver or gold levels, Pink Elephant requires information prepared by a customer of the vendor's choice that indicates the tool is installed and meets organizational needs to support ITIL best practices. Pink Elephant will verify this evidence with the customer to complete the qualification phase
- Once a tool passes a specific process assessment, Pink Elephant submits the score results and customer verification information to APMG for administration of the bronze, silver and or gold OGC ITIL *swirl* logo



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- Pink Elephant administers the PinkVERIFY Trademark License Agreement and logo directly to the vendor
- A tool may qualify for an OGC ITIL *swirl* logo and not for a PinkVERIFY logo. That's because Pink Elephant has developed additional questions within the PinkVERIFY criteria to support a focus on process integration requirements as well as 100% requirement for the common criteria in both schemes.

On its website, Pink Elephant provides a list of tools which have received PinkVERIFY status. The list identifies the processes inherent within the tool which are successfully assessed as aligned with the ITIL framework as documented as part of the PinkVERIFY published criteria