PROFESSIONAL QUALIFICATION SCHEME

INTERMEDIATE QUALIFICATION

SERVICE CAPABILITY

SERVICE OFFERINGS AND AGREEMENTS CERTIFICATE

SYLLABUS

Contents

THE ITIL INTERMEDIATE QUALIFICATION:
SERVICE OFFERINGS AND AGREEMENTS CERTIFICATE

The ITIL Intermediate Qualification: Service Offerings and Agreements (SOA) Certificate is a free-standing qualification, but is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert Certificate in IT Service Management. The purpose of this training module and the associated exam and certificate is, respectively, to impart, test, and validate the knowledge on industry practices in service management as documented in the ITIL Service Lifecycle core publications.

The ITIL Certificate in Service Offerings and Agreements is intended to enable the holders of the certificate to apply SOA practices service management lifecycle and specifically in the following key ITIL process, role and function areas:

- Service portfolio management
- Service catalogue management
- Service level management
- Demand management
- Supplier management
- Financial management for IT services
- Business relationship management

This course also introduces and explores the implementation of SOA practices, as well as technology considerations.

Target Candidate

The target group of the ITIL Intermediate Qualification: Service Offerings and Agreements Certificate includes, but is not restricted to:

- IT Professionals
- Business managers
- Business process owners
- Individuals who require a deep understanding of the Service Offerings and Agreements processes and of how it may be used to enhance the quality of IT service support within an organization
- IT professionals who are working within an organization that has adopted and adapted ITIL and who need to be informed about, and thereafter contribute to, an ongoing service improvement programme
- Operational staff involved in service portfolio management; service level management; service catalogue management; demand management; supplier management; financial management for IT services and business relationship management who wish to enhance their role-based capabilities
- Individuals who have attained the ITIL Foundation Certificate in IT Service Management and wish to advance to higher level ITIL certifications
- Individuals seeking the ITIL Expert Certificate in IT Service Management for which this qualification can be one of the prerequisite modules
- Individuals seeking progress toward the ITIL Master Certificate in IT Service Management for which the ITIL Expert is a prerequisite.

Prerequisite Entry Criteria

Candidates wishing to be trained and examined for this qualification must already hold the ITIL Foundation Certificate in IT Service Management which must be presented as documentary evidence to gain admission

Candidates who hold the following ITIL qualifications are also eligible, and similar evidence will be required:

*   Earlier ITIL (V2) Foundation plus Foundation Bridge
*   ITIL Expert Certificate in IT Service Management (achieved via Service Manager or Practitioner bridging routes).

It is recommended that candidates:

*   Can demonstrate familiarity with IT terminology and understand that the context of service offerings and agreements management within their own business environment is strongly recommended
*   Have experience of working in the service management capacity within a service provider environment, with responsibility for at least one of the following management processes and activities:
    *   Service portfolio management
    *   Service catalogue management
    *   Service level management
    *   Demand management
    *   Supplier management
    *   Financial management for IT services
    *   Business relationship management

Before attending training for the certification it is also strongly recommended that candidates read the ITIL Service Lifecycle core publications and, in particular, the *ITIL Service Strategy and ITIL Service Design* publications.

Eligibility for Examination

To be eligible for the examination leading to the ITIL Service Offerings and Agreements Certificate, the candidate must fulfil the following requirements:

*   Have undertaken at least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organisation (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
*   2 to 4 years' professional experience working in IT service management is highly desirable
*   Hold the ITIL Foundation Certificate in IT Service Management (or other appropriate earlier ITIL and bridge qualifications– see *Pre-requisite Entry Criteria* on p5)
*   It is also recommended that candidates should complete at a minimum 12 hours of personal study by reviewing the syllabus and the pertinent areas within the *ITIL Service Strategy and ITIL Service Design* core guidance in preparation for the examination, specifically *Chapter 2: Service management as a practice*.

Syllabus at a Glance

Learning Unit SOA01: Introduction to service offerings and agreements (SOA)
Bloom's Level 2 Objectives – Full understanding of SOA terms and core concepts
- The value to the business of SOA activities
- The lifecycle within the SOA context
- How services deliver value to customers and the business and the relevance to the SOA processes
- How requirements are identified through the SOA processes
- Understanding return on investment (ROI) and the business case

Learning Unit SOA02: Service portfolio management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of service portfolio management principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Service portfolio management, including concepts, methods, activities, roles and operation as well as its organizational structure and the interfaces with other processes
- Service portfolio management in relationship to the service catalogue and service pipeline and how these support SOA
- Metrics and critical success factors (CSFs) associated with service portfolio management in support of SOA

Learning Unit SOA03: Service catalogue management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of service catalogue management principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Service catalogue management, including its concepts, activities, roles and operation as well as its organizational structure and the interfaces with other processes
- Service catalogue in relationship to the service portfolio, the business catalogue, the technical service catalogue and how these components are used to ensure service quality within SOA
- Metrics and CSFs associated with service catalogue management in support of SOA

Learning Unit SOA04: Service level management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of service level management principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Service level management (SLM), including its concepts, activities, roles and operation as well as its organizational structure and any interfaces with other processes
- SLM components and activities, including service level agreements (SLAs) structures, service level requirements (SLRs), operational level agreements (OLAs), CSFs, underpinning contracts (UCs), their metrics, performance and monitoring
- How these components are used to ensure service quality within SOA

Learning Unit SOA05: Demand management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of demand management principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Demand management process, including its concepts, activities, roles and operation as well as its organizational structure and any interfaces with other processes
- Demand for services especially in relation to patterns of business activity and how it is used within SOA
- Service portfolio interaction with demand management and how demand can be managed for service in relation to providing business benefits and in support of SOA
- Metrics and CSFs associated with demand management in support of SOA

Learning Unit SOA06: Supplier management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of supplier management principles, techniques and relationships and the application of them for the effective management of service offerings and agreements
- Supplier management process inclusive of its concepts, activities, roles and operation including its organizational structure as well as any interfaces with other processes
- Supplier management components and activities (for example supplier categorization, supplier evaluation, supplier and contract database, metrics and CSFs) and how these are used to ensure service quality within SOA

Learning Unit SOA07: Financial Management for IT services
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of financial management for IT services principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Financial management for IT services, including its concepts, activities, roles and operation as well as its organizational structure and any interfaces with other processes
- Financial management for IT services components and activities, including budgeting, accounting and charging and how these are used to ensure service quality within SOA
- Metrics and CSFs associated with financial management for IT services in support of SOA

Learning Unit SOA08: Business relationship management
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of business relationship management principles, techniques and relationships and their application for the effective management of service offerings and agreements
- Business relationship management, including its concepts, activities, roles and operation as well as its organizational structure and any interfaces with other processes
- Metrics and CSFs associated with business relationship management in support of SOA

Learning Unit SOA09: SOA roles and responsibilities
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of SOA roles and their application for the effective management of service offerings and agreements
- The roles and responsibilities related to all of the SOA processes

Learning Unit SOA10: Technology and implementation considerations
Bloom's Level 4 Objectives – The knowledge, interpretation and analysis of technology and implementation and their application for the effective management of service offerings and agreements
- Service management tools and where/how they would be used within SOA for process implementation
- The tools that support SOA
- What best practices should be used in order to alleviate challenges and risks when implementing Service Management technologies and designing technology architectures

Qualification Learning Objectives

Candidates can expect to gain competencies in the following areas upon successful completion of the education and examination components related to this certification:

- Overview of SOA processes and basic principles
- The value to the business of SOA activities
- How the SOA processes rely on a good business case
- How the SOA processes rely on a good understanding of return on investment (ROI)
- Processes across the service lifecycle pertaining to the service offerings and agreements curriculum:
    - Service portfolio management, which provides documentation for services and prospective services in business terms
    - Service catalogue management, which is concerned with the production and documentation of the service catalogue from a business and a technical viewpoint
    - Service level management, which sets up a service level agreement (SLA) structure and ensures that all SLAs have an underpinning support structure in place
    - Demand management, which identifies patterns of business activity to enable the appropriate strategy to be implemented
    - Supplier management, which ensures all partners and suppliers are managed in the appropriate way and includes contract management
    - Financial management for IT services, which includes ensuring understanding of the service value and the management of all financial considerations
    - Business relationship management, which ensures the customer's requirements are correctly identified
- SOA roles and responsibilities
- Technology and implementation considerations
- Challenges, critical success factors and risks

In addition, the training for this qualification should include examination preparation, including an opportunity for a mock examination.

Level of Difficulty

All ITIL service management qualifications use the Bloom's taxonomy in both the construction of the learning units and in the examination which is based on this syllabus.

A learning taxonomy is a scale of the degree of difficulty in the learning process. These levels apply to the cognitive, affective and psychomotor domains of learning but, in the ITIL Qualification Scheme, we deal only with the cognitive sphere.

Bloom defines six levels of learning in the COGNITIVE domain which are both sequential and cumulative. They move from the simple to the complex. This implies that in order to achieve the sixth level of learning, for example, the instructor must ensure that the previous five levels have been mastered.

Level 1 - The KNOWING level: The candidate is able to bring to mind or remember the appropriate material. The examination questions associated with this level tax the candidate's memory and include such tasks as defining, recalling, listing, recognizing, describing and naming.

Level 2 - The COMPREHENDING stage: The candidate is able to understand or grasp the meaning of what is being communicated and make use of the idea without relating it to other ideas or materials and without seeing the fullest possible meaning or translation of the idea. Examination questions at this level would include scenarios giving examples of, illustrating, inferring, summarizing and interpreting. These actions involve the knowing which has taken place at the first level.

Level 3 - The APPLYING level: The candidate should be able to use ideas, principles and theories in new, particular and concrete situations. Examination questions at this level involve both knowing and comprehension, and might include choosing appropriate procedures, applying principles, using an approach or identifying the selection of options.

Level 4 - The ANALYSING level: The candidate is able to break down a communication (rendered in any form) into constituent parts in order to make the organization and significance of the whole clear. Breaking down, discriminating, diagramming, detecting, differentiating and illustrating are important tasks at this level and can be seen to include the previous levels of knowing, comprehending and applying. Here the significance of the constituent parts of an entity are examined in order to understand the whole more fully.

Level 5 - The SYNTHESIS level: At this level the candidate is able to put back together again the various parts or elements of a concept into a unified organization or whole. This putting together again and making sense of small parts is a crucial factor in intelligence and learning. Examination questions at this level would include scenarios involving creating, writing, designing, combining, composing, organizing, revising and planning. In order for this level of learning to occur, it must include the first four levels – knowing, comprehending, analysing and applying. This level of learning is probably the most intense and exciting for the candidate.

Level 6 - The EVALUATING phase: In this phase the candidate is able to arrive at an overview and to judge the value and relative merit of ideas or procedures by using appropriate criteria. At this level of learning the candidate will be able to compare, judge, appraise, justify, criticize and contrast theories, procedures, methods and concepts. This level involves mastery of the five previous levels of knowing, comprehending, applying, analysing and synthesizing.

For the purposes of the ITIL Qualifications Scheme, the Bloom's level will appear in each syllabus module to identify the highest level of cognitive difficulty that the course content should deliver in order to meet the learning outcome and ensure the competence required to meet the examination level of difficulty.

The following table illustrates the use of the taxonomy in ITIL professional qualifications.

Bloom Levels and taxonomy	Used by ITIL certification	Intellectual activity in learning outcome and exam proficiency
1. Knowing 2. Comprehending	ITIL service management Foundation Level	The ability to recall, recite, name, and understand the meaning of ITIL terminology and basic practice fundamentals. *Vernacular examples used in Syllabus:* Understand; describe; identify
3. Applying 4. Analysing	ITIL service management Lifecycle Stream Capability Stream Managing Across the Lifecycle	The ability to use the practices and concepts in a situation or unprompted use of an abstraction. Can apply what is learned in the classroom in workplace situations. Can separate concepts into component parts to understand structure and can distinguish between facts and inferences. *Vernacular examples used in Syllabus:* Analyse; demonstrate; apply; distinguish; justify; produce; decide
5. Synthesis 6. Evaluating	ITIL service management Managing Across the Lifecycle – level 5 only ITIL Master	The ability to create patterns or structure from composite elements to achieve a new meaning or outcome. Can make judgements, weigh options of ideas and elements to justify and support an argument or case. *Vernacular examples used in Syllabus:* Evaluate; justify; summarize; plan; modify; manage; control

Intermediate stream qualifications will examine according to the Bloom level assigned to each syllabus learning unit within each of the service lifecycle and service capability streams. This means that a candidate must be prepared to be tested up to and including that level for any question related to that learning unit or units.

The examination format of complex multiple choice will offer a scenario and questions with a corresponding series of possible answers. Each is constructed to test a candidate's competency up to and including the Bloom level associated with the syllabus learning unit that the question is mapped to. Instructors should ensure that the module curriculum offers discussion, practical exercises and instruction that will ensure the candidate has the competence required to meet the exam level of difficulty.

The intermediate modules are expected to provide a practical level of proficiency to enable a candidate to utilize the knowledge learned in their work environment. The examinations test a level of proficiency that allows candidates to apply the knowledge learned in the course to correctly select the correct sequence of possible answers.

Service Offerings and Agreements Syllabus

The ITIL Intermediate Qualification: Service Offerings and Agreements Certificate is awarded to those who complete the following ten units of study described below and successfully pass the relevant multiple-choice examination.

Core guidance references with publication reference (SS – ITIL *Service Strategy*, SD – ITIL *Service Design*, ST – ITIL *Service Transition*, SO – ITIL S*ervice Operation*, CSI – ITIL *Continual Service Improvement*) and section numbers are included, along with indicative contact study hours.

The contact hours are shown in each learning unit and are suggested to provide adequate time to cover the core guidance content. However, Accredited Training Organisations (ATOs) are encouraged to combine or re-order the learning units in any way that suits the flow of their courseware content delivery. All ATOs must ensure, however, that the minimum contact hours for eligibility for examination are met.

Section numbers are indicated as "chapter . section . subsection" (X.X.X). Unless otherwise indicated instructional coverage of the content of the entire section referenced is assumed.

The process-related learning units cover the day-to-day operation of the ITIL processes covered in this course, but exclude aspects such as implementing the processes, which are covered in the Service Lifecycle modules.

The process-related units should be considered from the practitioner perspective and should impart the skills and knowledge needed to execute the activities on a daily basis.

For each process, all sub-sections in the book should be covered, with a particular focus placed on the end-to-end process flow. Candidates must understand the details of each process activity, along with associated methods and techniques.

The recommended contact hours for each process-related learning unit should be taken as a guide to the level of detail that can be achieved.

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA01** **Introduction**	This learning unit of this course provides an introduction to the core concepts and terminology of the service lifecycle stages that are related to SOA. These include select processes from service strategy and service design. SOA is a collection of relevant practices from the core guidance that are related to the creation and management of service offerings and the agreements required to support them. The relevant introduction to SOA includes an overview only, of two other processes: strategy management for IT services, and design coordination. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand and describe: • The context in the service lifecycle of the SOA processes from the service strategy stage (service portfolio management, demand management, financial management for IT services and business relationship management) Core Guidance References - SS 1.2, SD 1.2 • Understand the reliance of these processes (service portfolio management, demand management, financial management for IT services and business relationship	**Up to Bloom level 2** Knowing and Comprehending The ability to recall, recite, name and understand the meaning of ITIL terminology and basic practice fundamentals.

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
	management) on the existence of a strategy. Understand the purpose and objectives, scope and value to business of the strategy management for IT services process Core Guidance References - SS 4.1.1, SS 4.1.2, SS 4.1.3 • The context in the service lifecycle of the SOA processes from the service design stage (service catalogue management, service level management, supplier management) Core Guidance References - SS 1.2, SD 1.2 • Understand purpose and objectives, scope and value to business of the design coordination process Core Guidance References - SD 4.1.1, SD 4.1.2, SD 4.1.3 • How successful services depend on the customer's perception of utility and warranty and the relevance to the SOA processes Core Guidance References - SS 3.2.3 (*up to 3.2.3.2*), SS 3.2.4 (*up to 3.2.4.1*) • Understanding how the SOA processes are the starting point for understanding and identifying customer requirements Core Guidance References - SD 3.1.3, SD 3.4, SD 3.5 • Return on investment (ROI) and the business case and the relevance to the SOA processes Core Guidance References - SS 3.6.1 (*up to 3.6.1.2*)	
	Contact hours recommended – 1.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA02** **Service portfolio management**	This learning unit addresses how the process of service portfolio management contributes to SOA practices. It provides a complete overview of the objectives, scope and importance of service portfolio management and of how it relates business services to IT services. Service portfolio management policies, principles, concepts, activities, methods and techniques are explained in relation to SOA practices. The relationship of service portfolio management to the service catalogue and service pipeline is described and illustrated. Efficient use of service portfolio management metrics is reviewed. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • Introduction to the service portfolio and its relationship to the service pipeline and service catalogue Core Guidance References - SS 4.2 introduction up to 4.2.1 • The purpose and objectives of service portfolio management Core Guidance References - SS 4.2.1 • The scope of service portfolio management Core Guidance References - SS 4.2.2 • The value to the business of service portfolio management Core Guidance References - SS 4.2.3 • Policies, principles and basic concepts Core Guidance References - SS 4.2.4 • Process activities, methods and techniques Core Guidance References - SS 4.2.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SS 4.2.6 • Information management Core Guidance References - SS 4.2.7 • Critical success factors and key performance indicators Core Guidance References - SS 4.2.8 • Challenges and risks Core Guidance References - SS 4.2.9 • Designing the service portfolio Core Guidance References - SD 3.7.2.1	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of service portfolio management principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 2.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA03** **Service catalogue management**	This learning unit explores how the process of service catalogue management contributes to SOA practices. It provides a complete overview of the objectives, scope and of the importance of service catalogue management as an interface to the service portfolio, as well as of the difference between a business and a technical service catalogue. Service catalogue management policies, principles, concepts, activities, methods and techniques are explored in relation to SOA. Efficient use of service catalogue management metrics are reviewed in this unit. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The importance of the service catalogue to the service lifecycle and its interface to the service portfolio Core Guidance References - SS 4.2.4.3; SD 3.7.2.1 • The purpose and objectives of service catalogue management Core Guidance References - SD 4.2.1 • The scope of service catalogue management Core Guidance References - SD 4.2.2 • The value to the business of service catalogue management Core Guidance References - SD 4.2.3 • Policies, principles and basic concepts Core Guidance References - SD 4.2.4 • Process activities, methods and techniques Core Guidance References - SD 4.2.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SD 4.2.6 • Information management Core Guidance References - SD 4.2.7 • Critical success factors and key performance indicators associated with the process Core Guidance References - SD 4.2.8 • Challenges and risks associated with the process Core Guidance References - SD 4.2.9 • Production of a service catalogue Core Guidance References - SD Appendix G	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of service catalogue management principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 2.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA04** **Service level management**	This learning unit introduces the service level management (SLM) process and how it contributes to SOA. It provides a complete overview of the objectives, scope and the importance of SLM as a process to generate business value. IT SLM policies, principles, concepts, activities, methods and techniques are explained in relation to SOA practices, including SLA structures and determining service level requirements. Efficient use of SLM metrics are reviewed in this unit along with monitoring of service performance against SLAs (as well as OLAs). To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The importance of SLM to the service lifecycle Core Guidance References - SD 4.3 introduction up to 4.3.1 • The purpose and objectives of SLM Core Guidance References - SD 4.3.1 • The scope of SLM Core Guidance References - SD 4.3.2 • The value to the business of SLM Core Guidance References - SD 4.3.3 • Policies, principles and basic concepts Core Guidance References - SD 4.3.4 • Process activities, methods and techniques of SLM and how it relates to the service lifecycle. Core Guidance References - SD 4.3.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SD 4.3.6 • Information management Core Guidance References - SD 4.3.7 • Critical success factors and key performance indicators associated with the process Core Guidance References - SD 4.3.8 • Challenges and risks associated with the process Core Guidance References - SD 4.3.9 • The content of SLAs and OLAs Core Guidance References - SD Appendix F	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of service level management principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 6.0	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA05** **Demand management**	This learning unit addresses how the demand management process contributes to SOA practices. It explores the objectives, scope and importance of activity-based demand management as a process to generate business activity patterns. Demand management policies, principles, concepts, activities, methods and techniques are explained in relation to SOA practices. Efficient uses of the interfaces to service portfolio, as well as managing demand for service, are reviewed. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The importance of demand management to managing services throughout the service lifecycle Core Guidance References - SS 4.4 introduction up to 4.4.1, SS 4.4.4.3; • The purpose and objectives of demand management Core Guidance References - SS 4.4.1 • The scope of demand management Core Guidance References - SS 4.4.2 • The value to the business of demand management Core Guidance References - SS 4.4.3 • Policies, principles and basic concepts Core Guidance References - SS 4.4.4 • Process activities, methods and techniques Core Guidance References - SS 4.4.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SS 4.4.6 • Information management Core Guidance References - SS 4.4.7 • Critical success factors and key performance indicators Core Guidance References - SS 4.4.8 • Challenges and risks Core Guidance References - SS 4.4.9	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence of the knowledge, interpretation and analysis of demand management principles, techniques and relationships and the application of them for the effective management of service offerings and agreements.
	Contact hours recommended – 2.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty

ITIL SC:
 	
SOA06
 	
Supplier management
	This learning unit addresses how the supplier management process contributes to SOA practices. It explores the objectives, scope and importance of supplier management as a process to generate business value. It looks at supplier management policies, principles, concepts, activities, methods and techniques in relation to SOA practices as well as at how these relate to the service lifecycle. It covers the evaluation of new suppliers, the use of supplier categorization and maintenance of the supplier and contract database. Efficient use of supplier related measures and metrics are also reviewed.
	
	To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse:
	
	• The purpose and objectives of supplier management
	  Core Guidance References - SD 4.8.1
	
	• The scope of supplier management
	  Core Guidance References - SD 4.8.2
	
	• The value to the business of supplier management
	  Core Guidance References - SD 4.8.3
	
	• The principles and basic concepts
	  Core Guidance References - SD 4.8.4
	
	• Process activities, methods and techniques
	  Core Guidance References - SD 4.8.5
	
	• Triggers, inputs, outputs and interfaces
	  Core Guidance References - SD 4.8.6
	
	• Information management
	  Core Guidance References - SD 4.8.7
	
	• Critical success factors and key performance indicators
	  Core Guidance References - SD 4.8.8
	
	• Challenges and risks
	  Core Guidance References - SD 4.8.9
		Up to Bloom level 4
		
		Applying and Analysing
		
		The candidate should reach a level of competence in the knowledge, interpretation and analysis of supplier management principles, techniques and relationships and their application for the effective management of service offerings and agreements.

	Contact hours recommended – 3.0	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA07** **Financial management for IT services**	This learning unit looks at financial management for IT services and how it contributes to SOA. It provides an overview of the objectives, scope and importance of financial management for IT services as a process for generating business value. Financial management for IT services policies, principles, concepts like funding, accounting, and charging are covered, along with the activities, methods and techniques in relationship to SOA practices. Efficient use of financial management for IT services metrics is reviewed in this unit as well as their design and implementation. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The importance of the process to the service lifecycle Core Guidance References - SS 4.3 *(up to 4.3.1)* • The purpose and objectives of financial management for IT services Core Guidance References - SS 4.3.1 • The scope of financial management for IT services Core Guidance References - SS 4.3.2 • The value to the business of financial management for IT services Core Guidance References - SS 4.3.3 • Policies, principles and basic concepts Core Guidance References - SS 4.3.4 • Process activities, methods and techniques Core Guidance References - SS 4.3.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SS 4.3.6 • Information management Core Guidance References - SS 4.3.7 • Critical success factors and key performance indicators Core Guidance References - SS 4.3.8 • Challenges and risks Core Guidance References - SS 4.3.9	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of financial management for IT services principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 4.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA08** **Business relationship management**	This learning unit deals with business relationship management (BRM) and how this role contributes to SOA practices. It covers business relationship management policies, principles and concepts, along with the activities, methods and techniques in relationship to SOA practices. Efficient use of business relationship management metrics are reviewed in this unit, as well as their design and implementation. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The purpose and objectives of BRM Core Guidance References - SS 4.5.1 • The scope of BRM Core Guidance References - SS 4.5.2 • The value to the business of BRM Core Guidance References - SS 4.5.3 • Policies, principles and basic concepts Core Guidance References - SS 4.5.4 • Process activities, methods and techniques Core Guidance References - SS 4.5.5 • Triggers, inputs, outputs and interfaces Core Guidance References - SS 4.5.6 • Information management Core Guidance References - SS 4.5.7 • Critical success factors and key performance indicators Core Guidance References - SS 4.5.8 • Challenges and risks Core Guidance References - SS 4.5.9	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of business relationship management principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 2.5	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA09** **Service offerings and agreements roles and responsibilities**	This learning unit deals with the roles and responsibilities which contribute to SOA practices. Each SOA process has a number of roles associated with it. The responsibilities of these roles are defined and discussed. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • Key roles and responsibilities of service portfolio management Core Guidance References - SS 6.8.7 • Key roles and responsibilities of service catalogue management Core Guidance References - SD 6.3.6 • Key roles and responsibilities of SLM Core Guidance References - SD 6.3.7 • Key roles and responsibilities of demand management Core Guidance References - SS 6.8.10 • Key roles and responsibilities of supplier management Core Guidance References - SD 6.3.12 • Key roles and responsibilities of financial management for IT services Core Guidance References - SS 6.8.9 • Key roles and responsibilities of BRM Core Guidance References - SS 6.8.8	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of SOA roles principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 1.0	

Learning Unit	Curriculum Subjects Covered	Level of Difficulty
ITIL SC: **SOA10** **Technology and implementation considerations**	This learning unit deals with SOA technology and implementation considerations. Service design is specifically used to identify good practices and evaluation criteria for technology and tools related to process implementation. Service operation provides the specifics on planning and implementing service management technology support as well as a guide to generic requirements for technology. All three lifecycle stages (namely service design, service operation and service transition) are used to explore the challenges, Critical success factors and risks related to implementing practices and processes. To achieve the learning outcomes and meet the examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyse: • The generic requirements for technology to assist service design Core Guidance References - SD 7.1 • The evaluation criteria for technology and tooling for process implementation Core Guidance References - SD 7.2 • The good practices for practice and process implementation Core Guidance References - SD 8.2, 8.3, 8.4 • The challenges, critical success factors and risks related to implementing practices and processes Core Guidance References - ST 9.1-9.3, SO 9.1-9.3, SD 9.1-9.3 • How to plan and implement service management technologies Core Guidance References - SO 8.5	**Up to Bloom level 4** Applying and Analysing The candidate should reach a level of competence in the knowledge, interpretation and analysis of technology and implementation principles, techniques and relationships and their application for the effective management of service offerings and agreements.
	Contact hours recommended – 2.0	
ITIL SC: **SOA11** **Summary, Exam Preparation and Directed Studies**	This unit summarizes the material covered in the previous units and prepares candidates for the examination. It is likely that most course providers will wish to offer, and review, at least one mock examination opportunity.	
	Contact hours recommended – 2.0	

Lecture and Exercises

Meeting the learning objectives of this syllabus can be aided by the use of practical exercises during the delivery of an accredited course. It is recommended that course providers make use of exercises to enhance the reinforcement of the learning objectives in this syllabus. To aid course providers, there are areas within each learning unit whose learning objective includes such phrases as "identify, describe, analyse", etc, which may be considered as opportunities to introduce practical course exercises. These are not mandated areas for practical exercises, but provided as suggestions for use by course providers.

Format of the Examination

Type	Eight (8) multiple choice, scenario-based, gradient scored questions. Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.
Duration	Maximum 90 minutes for all candidates in their respective language.
Provisions for additional time relating to language	Candidates completing an exam in a language that is not their mother tongue have a maximum of 120 minutes to complete the exam and are allowed the use of a dictionary.
Prerequisite	• ITIL Foundation Certificate in IT Service Management (or other appropriate earlier ITIL and bridge qualifications – see *Pre-requisite Entry Criteria* on p5) • Completion of an Accredited course from an ITIL Accredited Training Provider
Supervised	Yes
Open Book	No
Pass Score	28/40 or 70%

Criteria of Training Competence

This syllabus can only be delivered to target groups by an accredited provider/trainer. Any provider/trainer must hold the following qualifications to be eligible to provide this syllabus:

Criteria	Eligibility	Degree of proficiency validation
Accredited Training Organisation	Required	The company shall be registered and in good standing with the Official Accreditor
ITIL Service Offerings and Agreements Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute
ITIL Expert Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute

Approved Delivery Structure

Structure	Operational Standard Requirements
Training Delivery	• Training providers are free to structure and organise their training in the way they find most appropriate, provided the units of the syllabus are sufficiently covered. • Training must be delivered via an ATO based on this syllabus. Training can be delivered virtually, via an e-learning / learning technology solution.

Terminology List

After studying this course, the candidate is expected to understand the meanings of the following terms in the context of service offerings and agreements. This list does not include terms that are explicitly mentioned within the learning units of this syllabus - for example, "return on investment".

accounting
agreed service time
agreement
availability management
billing
budgeting
business capacity management
business continuity management
business impact analysis
business objective
business relationship manager
business unit
capacity management
capital cost
change proposal
change window
charging
charging policy

continual service improvement
contract
core service
cost centre
cost element
cost management
cost model
cost type
cost unit
CSI register
customer agreement portfolio
customer asset

customer portfolio
customer-facing service
depreciation
differential charging
direct cost
downtime
effectiveness
efficiency

exception report
external customer
external service provider
financial year
fixed cost
indirect cost
internal customer
internal rate of return
internal service provider
IT steering group

marginal cost
net present value
notional charging
opportunity cost
outcome
pattern of business activity
planned downtime
priority
profit centre
project
project portfolio
real charging

service acceptance criteria
service capacity management
service contract
service design
service design package
service hours
service improvement plan
service knowledge management system
service level requirement
service level target
service option
service owner
service package
service reporting
stakeholder
statement of requirements
supplier
supplier and contract management information system
support hours
supporting service
total cost of ownership
total cost of utilization
underpinning contract
unit cost
user profile
value chain
value network
variable cost

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