

ITIL Lite for SMBs: A Simplified Starter Kit

What is ITIL Lite?

ITIL (Information Technology Infrastructure Library) is a framework for managing IT services, but its full complexity is often overwhelming for SMBs. ITIL Lite focuses on the 20% of practices that deliver 80% of the value:

- Incident Management
- Change Management
- Service Request Management
- Basic Service Level Agreements (SLAs)

Step 1: Understand Your Starting Point

Objective: Map your current IT processes and identify gaps.

- Action 1: List all IT services you provide (e.g., email, file storage, helpdesk).
- Action 2: Interview staff to identify recurring issues (e.g., frequent downtime, slow response times).
- Template: Use a simple spreadsheet to track:
- Service Name | Owner | Common Issues | Current Resolution Time

Step 2: Define Core Services & SLAs

Objective: Set clear expectations for IT service delivery.

- Action 1: Prioritize 3–5 critical services (e.g., network uptime, helpdesk support).
- Action 2: Draft basic SLAs with realistic targets:
- Example: "Helpdesk tickets resolved within 4 business hours for Priority 1 issues."
- Template:

Service: [Name]

Owner: [Role]

Target Resolution Time: [X hours/days]

Escalation Contact: [Name/Email]

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Step 3: Implement Incident Management

Objective: Resolve disruptions quickly and systematically.

- Action 1: Create a centralized incident log (use a shared spreadsheet or free tools like Trello).
- Action 2: Categorize incidents by priority:
 - Priority 1: Critical (e.g., total system outage).
 - Priority 2: Major (e.g., slow performance).
 - Priority 3: Minor (e.g., password reset).
- Action 3: Assign an "Incident Manager" to oversee resolution and communication.

Step 4: Streamline Change Management

Objective: Avoid disruptions from IT changes (e.g., software updates, new tools).

- Action 1: Use a Change Request Form for all non-emergency changes.

- Template:

Change Description: [What are you changing?]

Reason: [Why is this needed?]

Risk Assessment: [Low/Medium/High]

Planned Date: [When?]

Backout Plan: [How to revert if it fails?]

Approved By: [Name/Date]

- Action 2: Hold a 15-minute weekly "Change Advisory Board" (CAB) meeting with key stakeholders to review requests.

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Step 5: Simplify Service Request Management

Objective: Handle routine user requests efficiently (e.g., access requests, software installations).

- Action 1: Create a self-service portal (use free tools like Freshdesk, Zendesk, or a shared Google Form).
- Action 2: Define standard response times:
- Example: "New user account setup within 24 hours."

Step 6: Adopt Basic Monitoring & Reporting

Objective: Track performance and improve over time.

- Action 1: Use free monitoring tools (e.g., Uptime Robot for uptime, Spiceworks for network health).
- Action 2: Generate a monthly report with:
- Number of incidents resolved
- Average resolution time vs. SLA targets
- Top 3 recurring issues

Step 7: Train Your Team

Objective: Ensure everyone understands their role.

- Action 1: Host a 1-hour workshop to review ITIL Lite processes.
- Action 2: Share SLAs and incident workflows with all staff.

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Step 8: Iterate & Improve

Objective: Continuously refine your processes.

- Action 1: Hold a quarterly review to:
 - Update SLAs based on performance data.
 - Simplify workflows causing bottlenecks.
- Action 2: Celebrate improvements (e.g., reduced downtime).

Free Tools for ITIL Lite

- Incident/Request Tracking: Trello, Jira Service Management (Free for 3 agents)
- Monitoring: Uptime Robot, Spiceworks
- Documentation: Google Workspace, Notion
- SLAs/Reporting: Google Sheets, Airtable

Quick Start Checklist

1. Document 3 critical IT services and draft SLAs.
2. Set up a shared incident log.
3. Schedule your first CAB meeting.
4. Train staff on new workflows.