Localisation Service Management Principles

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Abstract
Traditionally, the translation and localisation industry is considered to follow the management principles of project management. This paper presents service management principles and best practices according to the IT Infrastructure Library, currently the most comprehensive framework for service management, and discusses their application and adaptation to the translation and localisation industry. This paper identifies management practices in localisation and aligns the role of the localisation project manager to the operational functions defined in service management. It ultimately reflects on the influence of service management principles in localisation and provides grounds for further study of service management as a managerial approach for the localisation industry.

Keywords: service management, project management, management by projects, ITIL, ITSM

1. Introduction

Service management has evolved over the years and is nowadays a very developed field in the IT sector. The localisation industry, as a language services sector, is very much involved in service management practices. Nevertheless, it has mostly postponed the study of service management so far, or it might have circumscribed it to internal knowledge in language service providers.

There are several possible reasons for this. On the one hand, the attachment to the already well-established terminology and research focus on project management in the localisation industry. We are used to referring to translation projects and project management rather than translation service management, even if the term language service provider is widely used. On the other hand, it could have been the current focus on solving the issues technology presents in the use of language and management tools, which might have detracted from promoting industry talks on actual service management. Moreover, language service providers might consider they have already acquired the necessary service management expertise to meet their (and their customers’) goals, through their constant reaction and adaptation to the needs of the market over the years.

At its current level of maturity, the localisation industry is ready to adopt service management best practices standards in order to improve service operations and delivery. However, there is not an established framework for localisation service management best practices yet. Thus the study of service management and its application to localisation can be best achieved by the analysis of existing service management standards, particularly the IT Infrastructure Library, the de facto standard for IT service management and the most extensive framework for service management in general.

2. From Project Management to Service Management

Localisation is evolutionary in nature. It must adapt constantly, as the software industry changes, new ways of creating content appear, and more and more content is localised. It transitioned from the unstructured efforts in the early 1980s to the creation of in-house teams with the technical and linguistic savvy to carry out localisation. In the 1990s, many language service providers emerged as the model shifted, with the IT industry often outsourcing localisation. Language service providers hired engineers, linguists and desktop publishers to handle the localisation process; more importantly, project managers were tasked with the coordination of complex multilingual projects (Esselink 2003).

The content explosion in the 2000s, along with the development of more sophisticated tools, standards that increased interoperability and guaranteed a certain degree of quality, as well as the consolidation of larger multi-language vendors, laid the grounds for further standardisation of the localisation workflow.
Language service providers (LSPs) gradually adapted to new market trends, increasing their ability to manage larger volumes at lower costs while incorporating value added into their services. Localisation underwent a strong transition into a modern service industry.

At present, service management (SM) clearly comes into the equation as the localisation industry attempts to find out ways to deliver content faster, with high quality and automatically, while seamlessly integrating the localisation workflow into its customers’ business models. Management practices have evolved too. Even if we still retain the terminology, the very concept of localisation project can no longer be defined only from the traditional perspective of project management. Project management, management by projects and service management coexist nowadays in what is known as localisation project management. In order to understand the application of service management practices in the localisation industry, the relevance of each of these three separate yet related areas to localisation management must be discerned.

2.1 Project Management and Management by Projects

A Guide to the Project Management Body Of Knowledge (PMBOK) by the Project Management Institute is the main framework for project management. It gives a very concise definition of what a project is: “a temporary endeavour undertaken to create a unique product or service” (1996, p.4). Projects are initiated with a set of goals, and a clear beginning and end, and they address work that has not been done before. The PMBOK clearly separates projects and operations: operations are predictable, “on-going and repetitive” activities (ibid, p.4). According to the PMBOK, project management is “the application of knowledge, skills, tools and techniques to project activities in order to meet or exceed stakeholder needs and expectations from a project” (ibid, p.6) and it is concerned with project scope, time, cost and quality, among others.

Mantel et al make a difference between project management and general management (2011, p.5). General management deals with exceptions to the overall routine tasks of an organisation, while in projects almost everything is an exception (thus the concept of project). In order to accommodate projects into the workload of an organisation, restrictions concerning departmental divisions, knowledge management and budgeting, amongst others, must be lifted or adapted.

The difference between projects and operations might not always be as clear as the theory suggests, and that might be the case in localisation. Often, localisation projects are not an exception in a company’s organisational framework. The production department of a localisation company might run projects according to patterns, thus streamlining many project management processes and effectively bringing them closer to operations within the organisation. Mantel et al acknowledge the limitations of the traditional definition of project in their well-known study on project management, Project Management in Practice (2011). One of the several trends that Mantel identifies in project management is in achieving routine goals. He refers to the adoption of a projectised workflow to perform routine work. Scholars such as Roland Gareis (1991) refer to this operational scenario as management by projects: the management of both projects and operations following project management practices. The PMBOK briefly acknowledges it:

The term project management is sometimes used to describe an organisational approach to the management of ongoing operations. This approach, more properly called management by projects, treats many aspects of ongoing operations as projects in order to apply project management to them. (PMBOK 1996, p.6)

Management by projects applies to project-oriented companies, such as many LSPs, that “carry out small and large projects, internal and external projects, and unique and repetitive projects to cope with new challenges and potential in a dynamic business environment” (Gareis 1991). It could be argued that, in localisation, each project is unique. But their uniqueness in terms of content does not detract from the fact that translation and localisation projects can be grouped in project types or categories that follow standard or well-delimited definitions and workflows. Project categorisation enabled the development of reliable management systems, which depend on flexible yet well-defined workflows and standard practices, among others. Localisation service providers are usually project-oriented and the application of project management practices to routine work—projects with certain characteristics that fall within a project category—makes it possible to disregard the difference between projects and operations (or, at least, to diminish its relevance). Project categorisation is also a key enabler of the application of IT service management practices in localisation.
Steve Crago introduces some of the benefits of this approach in his white paper ‘Management by Projects’ (2006), most of which reflect the close connection between management by projects and service management. To name a few, he refers to the use of project management tools “fed continuously from a number of sources” (2006, p.9) as a knowledge base for organisations, to the fact that data collected from many projects can be available to different stakeholders simultaneously, and to the positive effect on customer-perceived value as all services are managed as projects, among others.

2.2 Service Management
A service is “a means of delivering value to customers by facilitating outcomes customers want to achieve, without the ownership of specific costs and risks” (ITIL 2007a, p.5). Service management is concerned with the implementation and delivery of quality services and the optimisation of the supply chain in order to do so. “Delivering value” is the key in the definition of service, a clear goal for all service providers including localisation organisations.

Knowledge on service management is primarily centralised through the IT Infrastructure Library (ITIL), a vast framework for IT service management (ITSM), with over 1,500 pages spread throughout five core books. The large extension and the ambitious scope of ITIL are what make it the best reference, not only in IT service management, but also in general service management. Moreover, ITIL is extensive and flexible enough to allow extrapolation to sectors outside of the IT industry. Much of what ITIL has achieved, and been acknowledged for, can be applied to localisation service management in particular.

The ITIL framework was first released in 1989, with a major update in 2000 (v2). The second version soon acquired popularity, particularly the volumes on service management. The impact of ITIL resulted in the development of the ISO/IEC 20000 standard on IT Service Management in 2005. ISO/IEC 20000 comprises ITSM best practices mostly according to the ITIL framework.

The purpose of service management is to provide customers with resources and to fulfil particular needs in the form of services while meeting the customers’ required levels of cost, quality and risk (ITIL 2007b, p.39). An organisation that requests a service from a specialised service provider is freed from the workload it would have to assume if it were to develop such a service on its own. Customers have their own goals which depend on the services requested in terms of ownership, control and utilisation. Service management coordinates these dependencies, for example, by providing a customer with access to its own resources as well as the service provider’s outcomes and possibly to a set of resources of the latter as well. Service needs can vary greatly: a customer might only require utilisation of resources while avoiding ownership costs; or it might require ownership of resources as well.

Translation and localisation services fit this scheme, as LSPs use their resources to carry out translation projects that their customers cannot carry out on their own (for instance, because of constraints in terms of resources and expertise). LSPs also help their customers relax constraints in terms of ownership, for example, through shared ownership of a translation memory (TM), if the LSP is responsible for the maintenance of the TM while the customer retains ownership of its contents and rights of use.

ITIL refers to specialisation as one of the main principles of service management. Service providers tend to specialise as coordination of resources and tasks that are interrelated and serve a specific purpose is best placed “under the control of the group most capable” of managing it (ibid, p.40), and interrelated resources and tasks are grouped together so that less coordination is needed.

According to ITIL, an organisation might decide to perform activities that are outside of its core competences internally—instead of outsourcing them to a service provider with the expertise to carry them out—if such an organisation is confident on its capability to do so and deems the project feasible. This might sometimes be the case in the localisation industry, where the large scale of some multilingual projects drives some corporations to create their own localisation departments so as to better coordinate outsourcing efforts, or to carry out localisation projects internally, or even to apply some of the most recent localisation models that are gathering momentum, such as crowdsourcing.

3. IT Service Management Functions and Localisation Project Management Roles

Achieving a consensus on what localisation project management comprises is a challenge, as the responsibilities of a project manager in one LSP might be significantly different to what project managers (PMs) do in other LSPs. A better
understanding of localisation project management can be acquired through the analysis of the actual work performed by project managers in different localisation companies. DePalma and Pielmeier’s report for Common Sense Advisory, The Responsibilities of Project Managers (2013), is a useful source to find out which tasks PMs often perform.

Based on a survey of 409 localisation project managers representing 182 LSPs from 52 countries, the report reveals that, out of the 44 tasks listed in it, none of them are performed by all respondents. There are, however, certain patterns which might serve as an indication of what localisation PMs often do. Their most common responsibilities are related to the traditional translation and localisation workflow, and include project planning and execution, some financial aspects (quoting), communications management, file management, and signing off projects for delivery (ibid, p.5). Other, peripheral functions include recruiting vendors, formatting tasks and training other employees, and many PMs also have secondary roles as linguists or account managers. Multitasking is frequent among PMs.

According to the survey, localisation PMs “handle the vast majority of production and client-related issues” (ibid, p.6) and serve as the contact to the customer in most cases (73%). This can be linked to the strong customer focus in service management best practices, which stress the importance of efficient incident resolution.

The two factors that make the most difference in respondents’ answers are experience and rank and whether PMs work in general or specialised projects. Different profiles of PM perform different tasks, pointing out access management, hierarchy and escalation as well as task assignment—all of them considered in ITSM—as important managerial aspects in localisation organisations.

DePalma and Pielmeier describe the importance of support positions to PM functions as “critical” (ibid, p.16). They hint at the intermingled relationship between projects and operations in localisation companies, as PMs are supported by assistants, functional production teams and “even operational teams” (ibid, p.16).

Unlike management by projects or agile project management, IT service management is not an evolution on management practices based on traditional project management, but a methodology in its own right, based on the Deming cycle (plan-do-check-act). Therefore, even if much of the terminology and many processes in project management and ITSM are shared, there is not a specific project management role in ITIL. In fact, ITIL does not usually refer to projects, but to services. The terms project and service are neither mutually inclusive nor exclusive. Services can be provided through both projects and operational activities; at the same time, projects can be carried out for both services and products.

According to Service Operation (ITIL 2007d), there are four main functions in service operations management: service desk; technical management; IT operations management; and application management. Each of these functions is carried out by a team, a functional unit within the organisation, in which different roles must be fulfilled (ITIL lists over 20 different roles spread over them). As pointed out above, a localisation PM is supported by different functional units in its organisation, effectively acting as a cross-functional link among stakeholders. For this reason, circumscribing the role of localisation project managers to a single function in ITIL is not possible. Nevertheless, some functions are closely related to the most common responsibilities of localisation PMs: service desk and IT operations management. Some technical and application management activities can be linked to the role of a localisation PM on occasion, yet these functions are more directly linked to what the leads of particular departments in an LSP would do.

The definition of the service desk already brings to mind some of the responsibilities of localisation PMs:

The Service Desk . . . should be the single point of contact for IT users on a day-by-day basis—and will handle all incidents and service requests, usually using specialist software tools to log and manage all such events. (ITIL 2007d, p.198)

The service desk is the point of contact for customers, which helps improve and clarify accessibility to information. With an effective centralised service desk, customers are likely to receive answers to their requests faster, and requests are sent to the relevant stakeholders and solved in a controlled manner. This improves both communications and information management.

Service desks in ITSM are responsible for logging and escalating incidents, informing customers and
receiving their feedback, and updating the information in the management system accordingly (2007d, p.199). ITIL also refers to the possibility of creating specialist groups in the service desk to handle particular services, much like what specialist PMs do according to CSA’s The Responsibilities of Project Managers.

As for particular roles within the service desk function, Service Operation includes the service desk manager, who reports to senior management; the service desk supervisor, who acts as the escalation point for complex issues; and the service desk analyst, who handles service requests, reports incidents, performs request fulfilment and provides first-level support.

Operations management refers to “the department, team or people responsible for performing the organisation’s day-to-day operational activities” (ibid, p.227). The IT operations management function encompasses the execution and monitoring of activities, as well as tasks such as job and shift scheduling and transitioning plans into actions. IT operations require an efficient use of resources to save costs and focus on achieving a return on investment strategy. Important information about activities in IT operations must be logged (e.g. completion of jobs, delivery, performance, and so on).

As for particular roles within IT operations management, Service Operation includes the IT operations manager, in charge of monitoring operational activities and scheduling routine work; and the shift leader, who takes responsibility for decision-making and control of activities.

The cross-functional nature of the localisation PM position implies that some of the responsibilities of other roles listed in Service Operation are related to what a localisation PM does. These include the incident manager, who handles incidents and the information regarding such incidents; and the problem manager, who performs follow-ups on major problems, acts as the contact point for suppliers and makes sure they fulfil their obligations.

**4. ITSM Principles in Localisation Service Management**

Senior management is responsible for deciding company policy regarding the market needs an organisation intends to address, the workflows and tools used, the organisation’s strategic goals, and so on. Project management is one of the most—if not the most—relevant function in executing company policy. The importance of project managers in executing company policy should be considered not only regarding what project managers do but also how they do it.

There are two main factors that impact the work of localisation project managers: the management principles in place and the management system in use. Technology considerations are essential in this regard: it is hardly possible that project managers will be able to efficiently follow the management principles of a localisation organisation if the management system itself—usually a translation management system (TMS) in LSPs—does not enable them to do so. For over a decade, LSPs have embraced advanced and constantly evolving management systems, in an increasingly competitive environment, with the goal of reducing overhead and increasing efficiency and throughput. Currently, many LSPs rely on complex translation management systems to manage most operational aspects. To a large extent, TMSes are intended to capture and spread company policy in an organisation. Sargent and DePalma (Translation Management System Scorecards, 2007) outline three main TMS categories: translation-centric solutions, business management solutions and enterprise solutions. This concurs with the idea that there are various business and production models among LSPs. A TMS that conveys the principles of service management is likely to be a great asset for organisations that aspire to instil SM best practices into their operational model.

The service lifecycle (see figure 1) is structured around five main stages in ITIL: Service Strategy, Service Design, Service Operation, Service Transition and Continual Service Improvement. This paper mainly draws upon the first three, as they provide an overview on service management that accounts for the principles of service management.

Service Strategy (ITIL 2007b) is at the core of the service lifecycle. It focuses on the role of service management towards meeting business goals, the relationships between customers and service providers, service provider types and the organisational aspects of service management. Service Design (ITIL 2007c) is concerned with the practical aspects in the application of a service strategy, in terms of utility and warranty. Service Operation (ITIL 2007d) focuses on the processes and
functions in service management necessary to successfully operate services.

4.1 Customer-Perceived Value of Services

Service customers have two main expectations. On the one hand, a high degree of utility, that is to say, an increase in the performance of their assets. On the other hand, warranty that a potential deviation in service performance will not offset the benefits in utility.

The concepts of service warranty and utility are related to managing uncertainty. Customers need to be reassured that, at a certain cost, they will obtain a service of a certain quality. Warranty backs up utility and shifts the costumer’s concerns from the risks and doubts of demanding a service to the potential gains the service yields.

4.1.1 Utility

Utility means “fitness for purpose” (ITIL 2007b, p.54). It is communicated by means of establishing clear outcomes for a definite service from the beginning of the service lifecycle, as well as in terms of the ownership costs and risks the customer avoids.

Commonly, service providers help remove or relax certain constraints their customers find in their business strategy. For example, the translation of a website removes a constraint in access from the people of a locale. This is perceived by the customer as a gain. Moreover, utility also comes from the risks avoided by the customer by purchasing a service from a specialised service provider instead of developing and carrying out certain tasks on its own. Typical constrains a customer might find are a limited capacity to perform some type of work internally or maintaining non-core assets to perform sporadic work (with the associated costs this approach implies).

Regarding the outcomes supported by the service provider, the concepts of service portfolio and service catalogue are relevant here. The service catalogue of an organisation includes all services the organisation markets, offers and, consequently, is capable of delivering. In localisation, these services might be website localisation, software localisation, legal translation, interpreting and so on. The service portfolio covers a wider range of services. It includes all services an organisation is capable of delivering even though they might not be part of their core offering and the organisation does not actively market them. The service portfolio might include third-party services, some of which might not be visible to the customer. These services are most often supporting services required to perform the core services (e.g. in localisation, desktop publishing, graphic design and machine translation, notwithstanding whether these services are outsourced or insourced). Moreover, the service portfolio includes services that the organisation no longer offers or carries out, that is to say, retired services (ibid, p.120).

The inclusion or not of a service in the service catalogue is not dependent on the nature of the service itself but rather on service strategy. That is to say, the above examples are just likely candidates and
not set in stone. Desktop publishing, for instance, might be included in the service catalogue of an LSP if it fits company policy regarding availability, capacity, value creation and market interest, among other factors.

Flexible service portfolio management involves a high degree of customisation that, for each new service, enables specific key performance indicators and metrics, financial reporting, status information, integration with third party tools, customisation of workflow designs and responsibility assignment, and individual definitions to be created for each service. In localisation, the TMS should ideally enable this degree of parametrisation and functionality.

A key reason that drives customers to require a service from a specialised service provider is that of avoiding ownership costs and risks. An organisation that requires a service outside of their core competences and tries to obtain it internally often finds itself constrained by the lack of expertise and, most likely, by the inability to estimate the associated costs and risks accurately. The demand of a service from a service provider not only helps the organisation obtain result-oriented benefits. It also helps remove such constraints and derives accountability to the service provider, at least to a certain extent. This is a clear motivation for customers of localisation services.

An organisation that outsources translation to, for instance, a legal or medical text to an LSP does so, on the one hand, to avoid the risk of incidents (lawsuits, negligence) from happening and, on the other hand, to derive ownership of such risks to the LSP (through a contract, a service-level agreement or other means), among other reasons. Accountability is transferred to the service provider or shared with it, and this creates utility, that is to say, it is perceived as added value by the customer. Undoubtedly, the outcomes (time, cost, performance) from the translation service are extremely important, but the ownership costs and risks avoided are a benefit not to be neglected.

4.1.2 Warranty
Warranty means “fitness for use” (ITIL 2007b, p.35). Utility and warranty are interconnected: a service that meets its required purpose might still be a failure if it is not delivered how the customer needs it in terms of availability, capacity, continuity and security, defined in Service Design (ITIL, 2007c) as the core processes of correct service design.

According to ITIL, a higher level of warranty is what makes some service providers stand out from the crowd, as warranty offers competitive advantage. ITIL refers to this circumstance in a way that echoes very closely changes currently taking place in the localisation industry, as the value of warranty as a basis for competitive advantage “is particularly true where services are commoditised or standardized” (ITIL 2007b, p.61). In a commoditised industry, the value of utility becomes harder to distinguish among service providers; therefore warranty becomes a strong selling point. Commoditisation leads customers to assume a certain quality and to start focusing on how they are delivered a service (faster, safer, cheaper, and so on).

There are several ways to communicate warranty of provided services to customers. ITIL points out certainty and transparency as two of them. A customer might need to know in detail the work that needs to be carried out before he is delivered a particular service, so as to know certain, predictable conditions of the delivery of a service. One of the effects of the application of quality standards such as the ISO 9001 and the EN 15038 standards is adding predictability to translation and localisation services.

Capacity is concerned with matching resource availability to business needs in order to maximise resource efficiency while reducing response times and the risks associated with unexpected workload increases (ITIL 2007c, p.134). Capacity directly affects service warranty. Service providers must be prepared to deal with a non-constant work stream and peak demand. This type of flexibility ensures that a service will be available in a timely manner even if there are changes in requirements and/or inputs from the customer. It also increases reliability, as periods of peak demand serve as a test where the service provider can show the opportunity gains from their service offering. Capacity management is also concerned with identifying patterns (and volume) of service requests so as to better adjust performance requirements and help service-level management better understand the customers’ capacity requirements.

Capacity constraints in the industry are not usually linked to server speed or storage limits, but to human resources in the supply chain. Most LSPs create and maintain a detailed vendor database which includes suppliers (both companies and freelancers) covering all services in their service portfolio, from translators and reviewers to DTP specialists and IT companies.

Availability is one of the most visible aspects of
service warranty from the customers’ perspective: a service should be delivered on time and, at delivery, it should be readily available for use under the agreed-upon conditions.

The high visibility of availability as value added makes for good availability management, a competitive advantage in the localisation industry (and most service industries). It should be regarded as a complex management field that goes far beyond the promise of shorter delivery times. Different levels of availability are vital so as to offer service warranty. Depending on the potential deviations in service management, incomplete instances of a service deliverable might be made available for use to a customer (or other particular stakeholders) so delays will still leave a customer some room to manoeuvre.

Commonly, customers demand confirmation of availability as soon as possible after they place a service request. If the right metrics are in place, delivery times might be estimated accurately. Availability of a service can only be high as long as it is reliable. A system offers reliability as long as it provides comprehensive, relevant information to help the manager determine availability. Availability issues in a particular component might have a ripple effect and ultimately affect service delivery, therefore solving them should be a priority.

**Continuity** is related to risk management in the wider sense. For the most part in ITIL, continuity is centred around IT infrastructure and short-term risks from critical failures in IT components (service disruption). In the context of localisation, we regard continuity in relation to the possibility of recovering past work or backtracking to previous processes in case of failure or error.

Continuity is even more important in localisation than in many other service industries. As an industry heavily reliant on leveraging past work, continuity failures could potentially have disastrous consequences for an LSP. The customers’ business decisions are impacted by post-service support, and leveraging content (terminology, translated segments, and so on) is a great asset for any LSP that wants to remain competitive. Due to the costly implications of continuity issues, LSPs tend to adopt the rough measure of creating server-based back-ups of absolutely all contents and data handled and installing recovery systems to mitigate any potential loss. Even if it can be argued that this reactive measure is not disproportionate in the context of localisation, full back-ups are not intended for any and all continuity failures. Cost-efficient continuity management also requires more compartmentalised reactive measures, and proactive measures must be considered as well.

Risk analysis involves inputs from availability, security and capacity but it is mostly considered integral to continuity. An established methodology, such as Management of Risk (ISO 31000) is recommended in ITIL. Management of Risk follows the cycle of identifying and assessing risks, planning, then implementing solutions, thus reducing the chance of potential risks.

**Information security** implies avoiding risks by using a customer’s assets only if authorised and for the agreed purposes. This involves providing access to the relevant stakeholders only and under the customers’ approval, and protecting the customers’ assets from “unauthorized or malicious access” (ITIL 2007b, p.60).

Information security is paramount in localisation as service providers retain and maintain their customers’ assets in the form of files and documents, and store information in translation memories and terminology databases (TDB), among others. Notwithstanding to whom the property of the content within TMs and TDBs, databases and documents belongs (whether to the customer or the service provider), it is in the best interest of an organisation to maintain a tight policy on information security.

Information security management in ITIL is structured around three principles: availability, confidentiality and integrity. Information availability involves providing access to information to the relevant stakeholders. Moreover, information security must ensure that integrity is kept, that information remains complete and cannot be modified without authorisation. Regarding confidentiality, security management is responsible for avoiding information leaks and unauthorised access. As an example, it is common practice in the localisation industry to ensure confidentiality by means of non-disclosure or operational-level agreements signed by vendors.

### 4.2 Service Operation Processes and Management Activities

There are three main aspects to service operations: processes, activities and functions. The third refers to the roles played by different member of an organisation in the service lifecycle and have been briefly referred to above. The focus on processes and
activities implies that this area is more concerned with particular features that enable the application of service management best practices through a management system, commonly a TMS. Particularly, management activities in ITIL refers to the use of technology features that enable and ensure that management principles are followed according to service strategy and company policy.

4.2.1 Service Operation Processes
In ITSM there are five main processes for appropriately carrying out and monitoring service operations: event management, request fulfilment, access management, incident management and problem management. Service Operation (ITIL v3, 2007d) covers these processes in depth. The correct implementation of service operation processes supports competitiveness and centralises knowledge on operations performance. ITIL operation processes are very relatable to service management in general and localisation service management in particular. Adequately managing project requests, monitoring and escalating issues appropriately, delivering outcomes to the relevant stakeholders and preventing potential disruptions to operations are some of the core ideas behind ITIL service operation processes. All of these aspects are most likely a top priority for most localisation organisations.

According to ITIL, an event is “any detectable or discernible occurrence” with an impact in service delivery or in the management of the IT infrastructure (2007d, p.67). Events can originate from either regular operations or deviations from standard service operations. Event management is used to measure actual performance against expected performance of a service, as well as to detect potential incidents early.

Event management implies automation of certain monitoring events so as to help managers carry out their work efficiently. In an LSP, this usually takes place by means of particular functionality in the TMS in use. Event management requires passive monitoring of actions and, above all, alerting the user about events. Notifications of all sorts often signal events: a translator has uploaded a file, a user has logged into the system, new e-mail has arrived, a delivery date for a project has not been set, a file could not be delivered or uploaded to the system, a task has not been assigned, costs of a project exceed its assigned budget, and so on. The list is almost endless. It should be noted that, even if some events might point out potential issues (e.g. a file could not be delivered), they should not be considered incidents as long as they do not require diagnosis and intervention; in other words, most events can be dealt with immediately and notifications are there to provide the user with meaningful information or exhort them to take remedial action immediately. If that is not the case, events should be reported as incidents.

An incident is an “unplanned interruption” to a service or a “reduction in the quality” of a service (2007d, p.86). Issues that have not yet impacted service operations but might do so in later stages are also considered incidents according to ITIL. Incidents should be dealt with in order to resume service operations or to avoid interruptions. A problem, on the other hand, is “the cause of one or more incidents” (ibid, p.111).

Incident and problem management are concerned with detecting, diagnosing and resolving such occurrences. Typical incidents include system failures and—commonly in localisation—queries sent by stakeholders. In localisation, PMs are usually responsible for passing queries sent by linguists to the relevant stakeholder (e.g. the customer’s validator). It is not uncommon that they cannot resume their work until the queries are resolved. Technical issues are also common incidents. Usually, workarounds are used until a problem is diagnosed and resolved, so as to minimise its impact on current operations.

The goals of request fulfilment include providing “a channel for users to request and receive standard services” (ITIL 2007d, p.105), informing about service availability and pricing, delivering outcomes and gathering feedback. Service requests do not only involve services themselves but anything related to services (e.g. information and quotes). Requests differ from incidents in that—whereas incidents are unplanned—they are planned or expected (ibid, p.105), therefore an organisation must be prepared to fulfil requests in a predictable way. It is within the policy of an organisation to decide how it will handle service requests. This includes quoting as well as initiating projects and, on the other hand, delivering outcomes and terminating projects.

Access management in ITIL Service Operation is quite focused on IT, but can be extrapolated to general service management. Access management is directly related to security management, but refers more specifically to granting access to a service to the relevant people, whereas security management was also concerned with the strategy of an
organisation in keeping confidentiality and content integrity. Access management is, nevertheless, the application of both security and availability management principles when running service operations. It should be noted that a user who manages access rights (e.g. a PM) is not responsible for deciding who has access to which information or content. That is within the scope of security management. Access management is responsible for the execution of the access policy established by the organisation.

Access management is extremely important for localisation organisations and for service providers in general. Controlling access to information and assets serves various purposes. Granting specific access rights enable stakeholders to carry out their assigned tasks while preventing errors and avoiding undesired modifications of information and/or assets by unauthorised users. And, undoubtedly, it is necessary so as to keep confidentiality. This management process is also known as identity management, as it also involves saving the appropriate information on users and verifying their statuses.

4.2.2 Activities

According to ITIL, activities “ensure that technology is aligned with the overall Service and Process objectives” (2007d, p.146). Activities support service operations and mostly refer to technology management. Admittedly, ITIL does not provide a list of activities for general service management. This is due to the fact that different service sectors might require different technology or different approaches to use similar technology.

For a mature service organisation, technology is a means to achieving business goals. This is easier said than done. For this to be true in the case of the management system in use in an organisation, there must be a correlation between the organisational approach to technology management and the capabilities of the management system itself. This is the idea behind service operation activities in ITIL, which makes it necessary to consider localisation-specific activities in the application of service management to localisation. Technology management activities should above all align service goals and technology tools.

Service Operation (ITIL, p.2007d) includes a number of service operation activities required to manage IT. Even though many of them are very specific to ITSM, some can be applied to service management in general and localisation service management in particular. These include, for instance, naming conventions and folder structures, interconnectivity, communication among users and re-routing of workloads, monitoring and control of key operational tasks, the implementation of a well-designed operations bridge, systems support, database administration and automation of repetitive tasks, among others.

As for localisation activities, some of the most common among them can be identified in the evaluation of TMSes carried out by Benjamin B. Sargent and Donald A. DePalma in their CSA reports How to Select a Translation Management System (2011), Translation Management System Scorecards (2007) and Translation Management Systems (2008). Among others, support for translation tools, quality standards, file management and workflow management can be discerned as some of the core technology activities relevant for LSPs and with a key role in aligning the functionality of a management system with the business and operational needs of LSPs.

5. Conclusions

At present, a detailed framework for localisation service management does not formally exist. Nonetheless, ITIL provides the necessary knowledge to understand service management and enables the identification of key ideas in service management that play a role in localisation. Even if project management accounts for many management aspects in localisation organisations, it can hardly continue to be considered the main and only management framework in an industry that is increasingly reliant on technology, focusing on the goal of meeting customers’ needs, competing in a commoditised market where competitive advantage is acquired by means of improving how services are delivered rather than what is delivered. Quality alone is not enough. Efficiency is a driving force as well. Service management is much more inclusive of technology considerations than project management—partly due to its strong development in the IT industry—and it still places the necessary importance on the people and processes involved in service operations and delivery. Efficient service management, with its clear focus on reducing overhead and improving processes, offers key benefits to localisation organisations.

LSPs that have achieved a high degree of maturity often have project managers specialised in particular
fields. Even if the roles defined in ITIL cannot be directly matched to localisation project managers, these usually have responsibilities which are similar to the responsibilities listed in ITIL Service Operation for several of the most common roles in service management.

Service management can be closely linked to localisation management. It is likely that experienced localisation project managers would recognise the importance of SM principles such as availability and capacity management, access management, monitoring or request fulfilment in management practices in localisation organisations. Further research on service management and the incorporation of industry talks into the study of service management would move forward the discussion and help communicate the idea—frequently expressed in this paper—that the establishment of a standard framework for localisation service management would help the localisation industry improve efficiency of project management and operational activities, even if the challenge in doing so is considerable.

References


