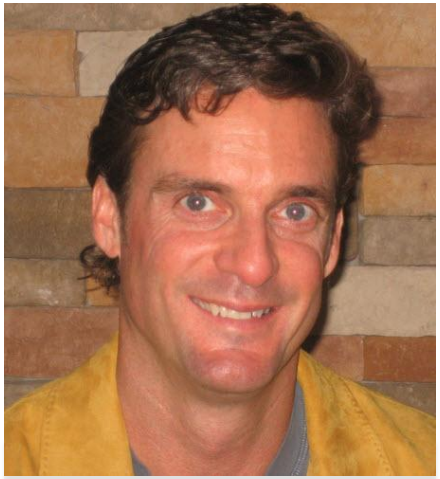
THE BREAKTHROUGH SERIES

from Thought Rock

Thought Rock Live Presentation



Mark Sherry
VP
ITSM Division, Stroma

Should Change and Release Management be the Same Process?

Over the years Mark Sherry has managed many ITIL implementations and the same questions always come up related to Change and Release Management:

Where does the Change Management process stop and the Release Management process take over?
Should they be combined into one process?
Should they remain separate processes?
What type of change classifications do we need?
Who decides if a release should be backed out?

The webcast today will answer these questions and others.

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SHOULD CHANGE AND RELEASE MANAGEMENT BE THE SAME PROCESS?

Mark Sherry

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Who is Marval?

Your "One Stop Shop"

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Definitions

- Change Management
  - "The process for controlling the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services".
- Release Management
  - "The process for planning, scheduling and controlling the build, test and deployment of releases, and for delivering new functionality required by the business while protecting the integrity of existing services".

ITIL® Service Transition, 2011 Edition

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Change According to ITIL

- Types of Service Change
  - Standard
  - Normal
  - Emergency
  - Major
- Change Coordination Activities
  - Build and Test
  - Deployment

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Release According to ITIL

- Release Activities
  - Release and Deployment Planning
  - Release and Build and Test
  - Deployment
  - Review and Close

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What really happens?

- Many Change workflows in real world
- Workflows are usually a combination of Change and Release
- Tasks are used to assign the work to resources for Changes/Releases
- Change approval is in many organizations a pre-release approval
- Changes cycle through development, test, production,and training environments

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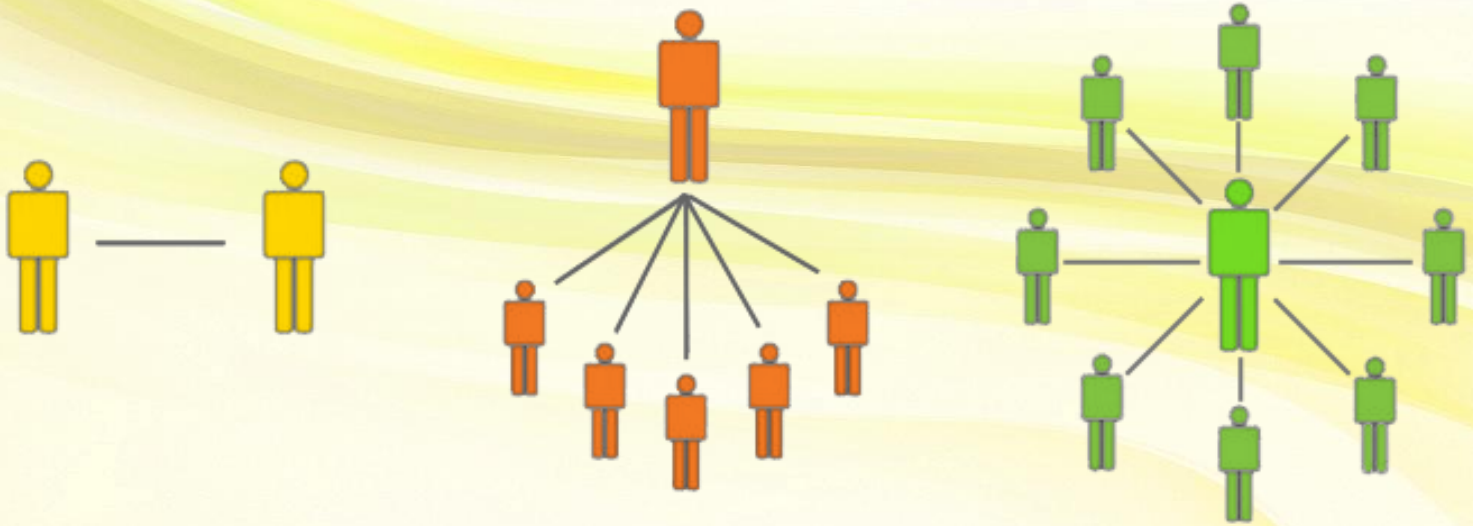
Change/Release Relationship

- One to One Relationship
- One to Many Relationship
- Many to One Relationship



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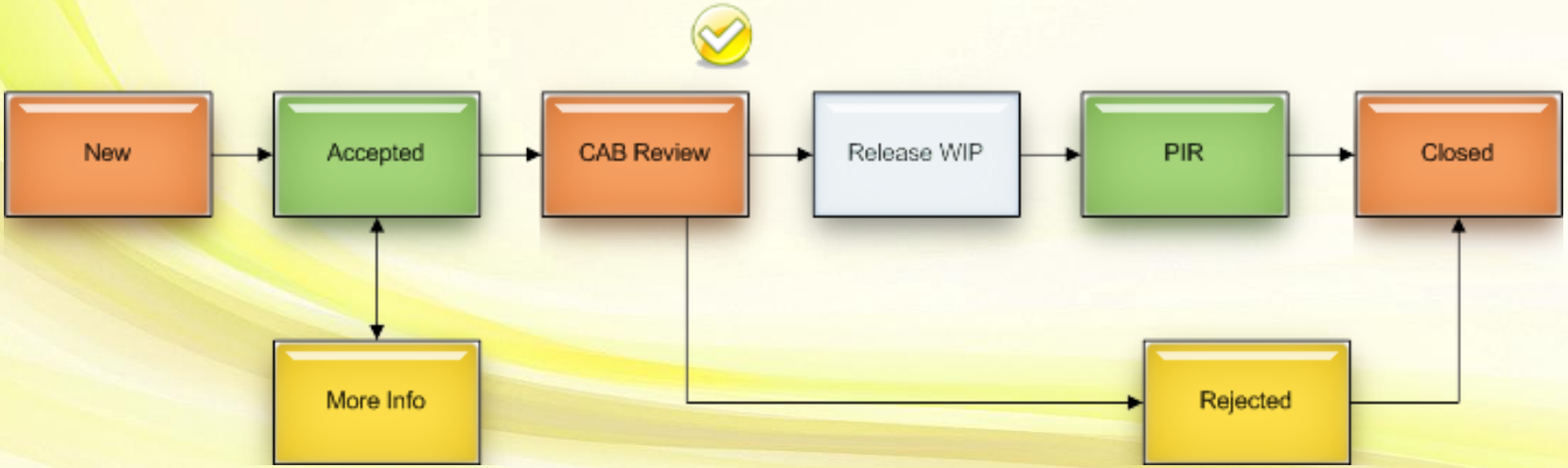
Process Flow – Change Only



Approval Status

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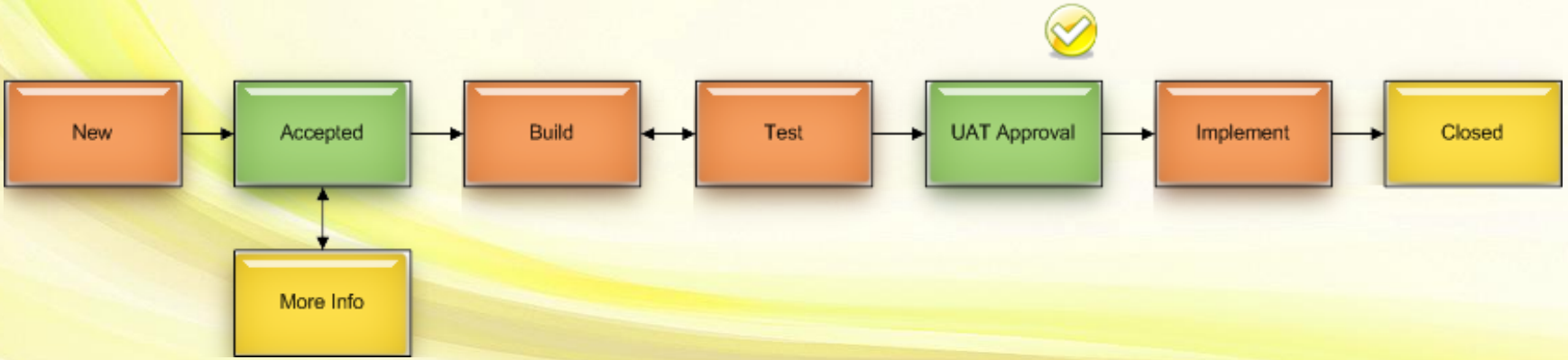
Process Flow – Release Only



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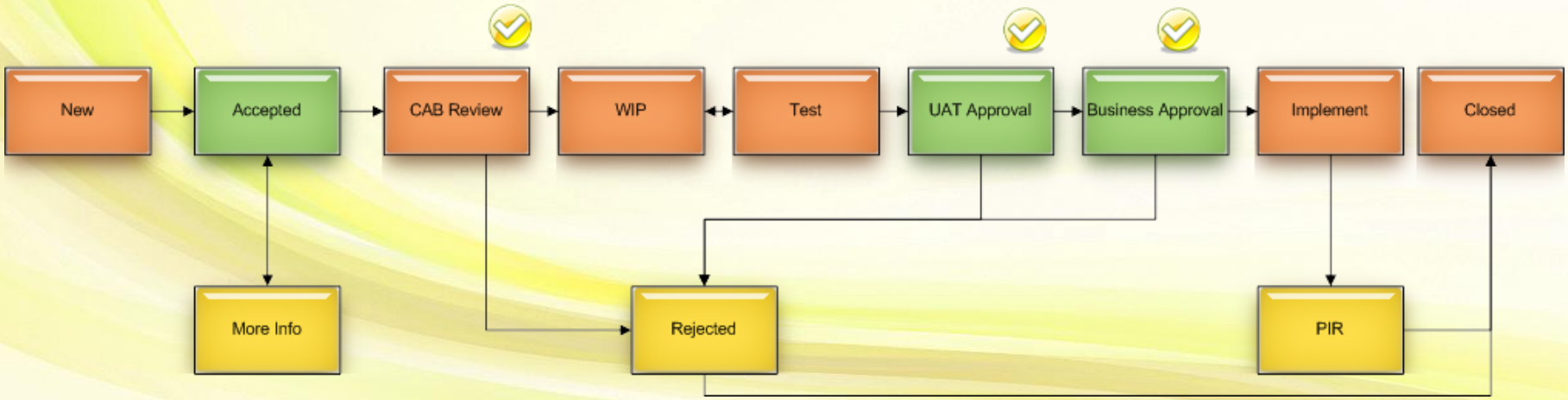
Process Flow – Change and Release Combined



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What is the Best Approach?

- If you create separate change and release workflows then you need to manage more requests and relate releases to changes and visa versa.
- If you use one workflow you lose the ability to add multiple changes to a release.

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Does a Certain Change Type Work Better with a Particular Workflow ?

- Standard
- Minor
- Normal
- Significant
- Major
- Emergency
- Specific Types – i.e. Software Request

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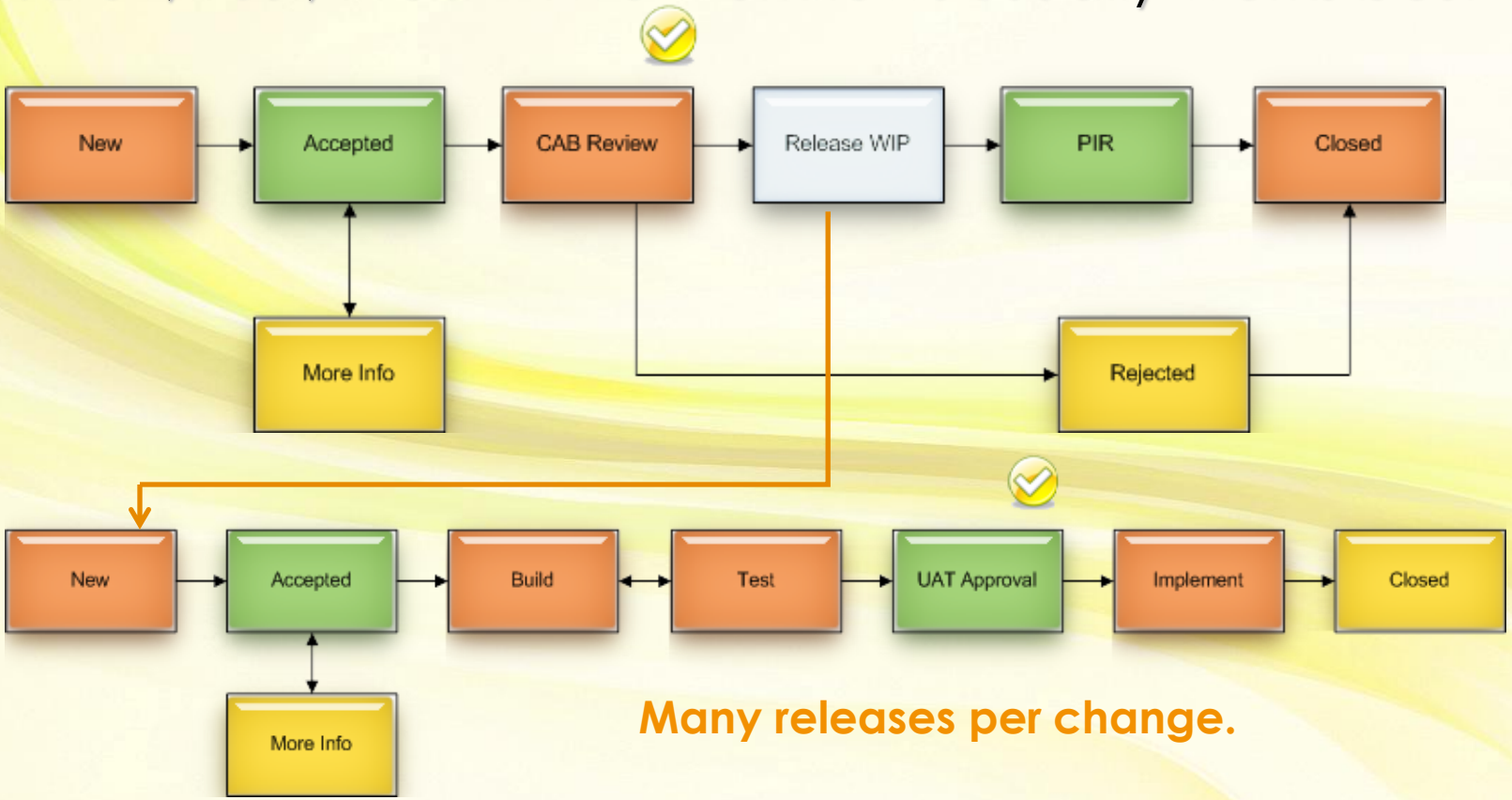
For a Change that involves multiple Releases

i.e. Dev, Test, Prod – Two workflows usually works best



Many releases per change.

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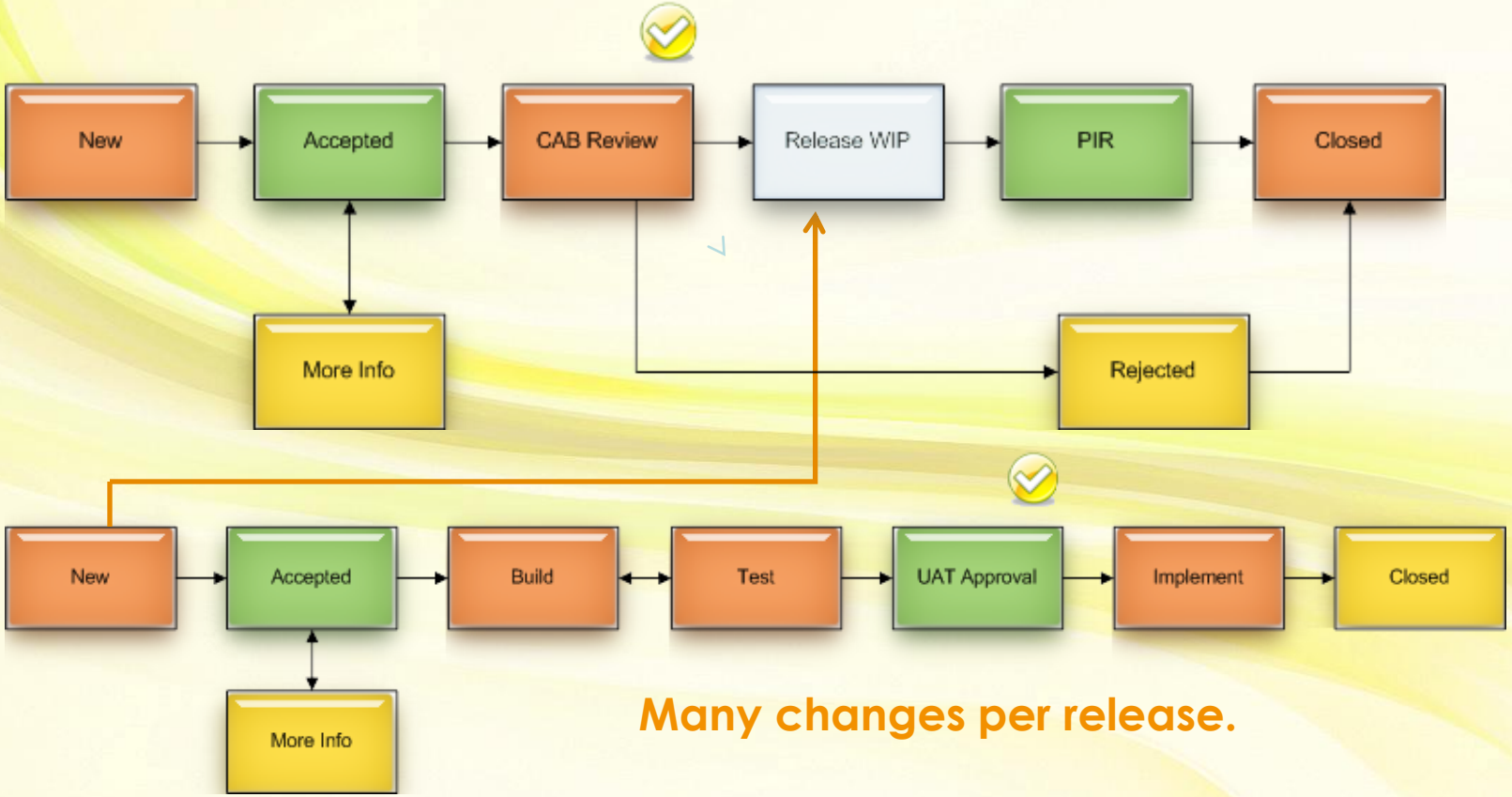
For a Release that involves multiple Changes

Two workflows usually works best



Many changes per release.

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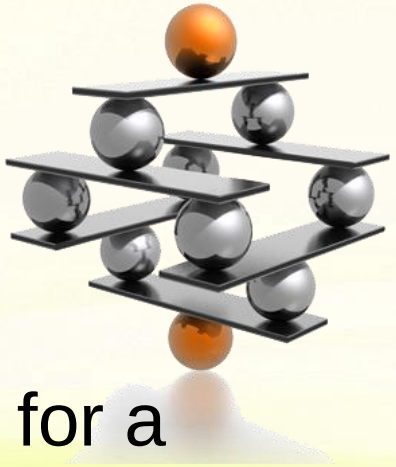
Multiple Changes/Releases Change Type



- Normal
- Significant
- Major
  - May have multiple changes for a given release.
  - May have multiple releases for a given change.
  - Therefore makes sense to separate.

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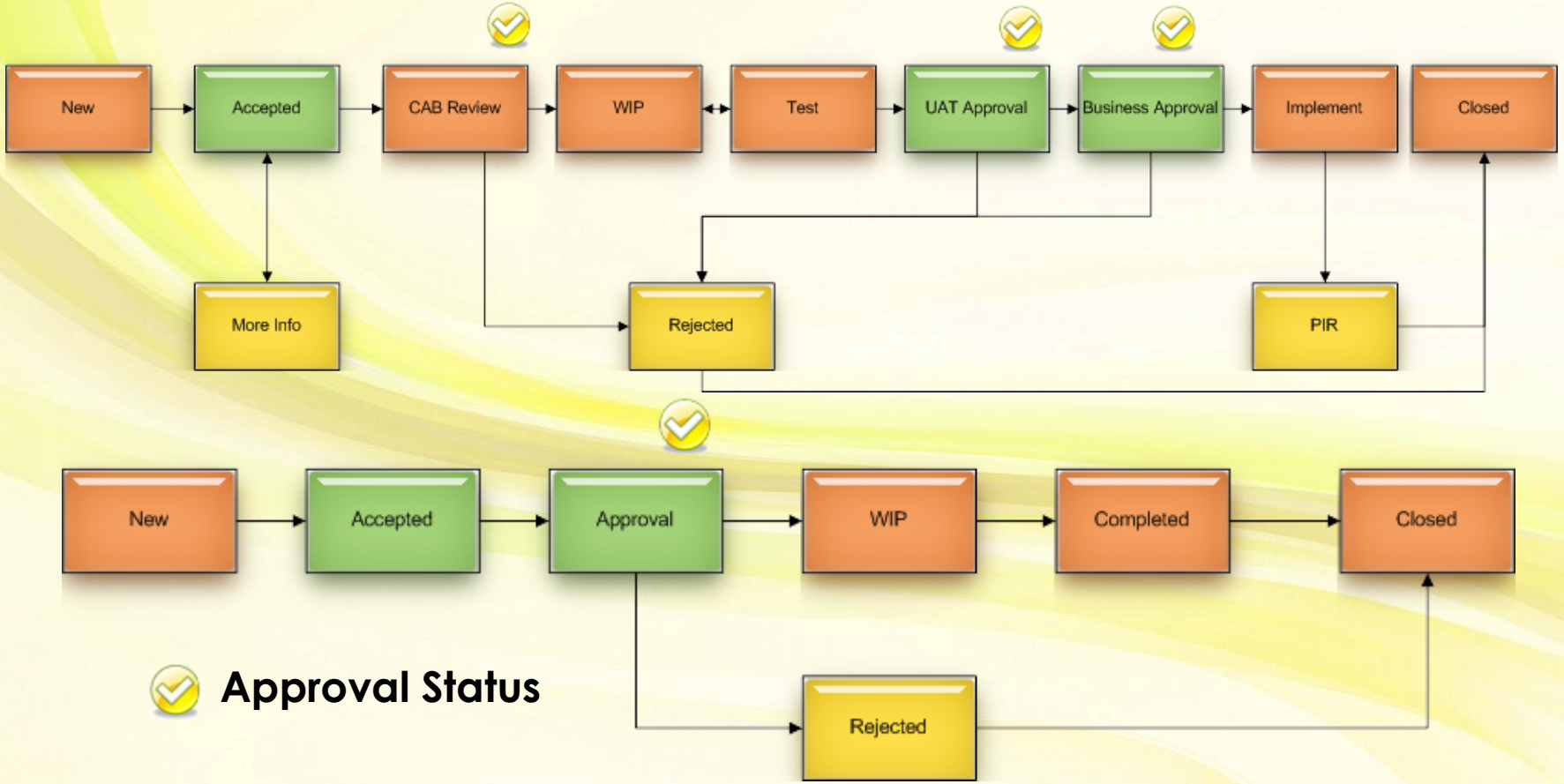
For a Change that involves a single Release



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One Change One Release

- Minor
  - Minor release are usually straight forward and can be managed.
- Standard
  - Usually managed as a Service Request.
- Emergency
  - Usually changes occur outside a workflow and entered into ITSM system posthumously.

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Is It That Simple?

- No just use as a guide.
- Tasks (Assignments or Sub-Requests) can allow multiple tasks (Releases) to be created that are related to a change. If this is the case is there need for Release?
- Think through the complexity of the changes and releases. Generally the more complex the higher the likelihood that they should be separated.

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Is It That Simple?

- If you can get away with just one workflow for two processes your process is streamlined.
- Just because you have two processes in one workflow does not mean that there is no release process. Release just gets reassigned the request (ticket) somewhere in the workflow.
- One workflow may make change and release work better together.

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Post Implementation Review

- Change is responsible for the PIR but Release needs to be involved.
- Think of Change as the quality control point.
- The more risk associated with a Change the more a PIR needs to be completed.

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Approvals

- What the process requires.
- Do not get hung up on change needs to approve everything at each step in the process especially if you have combined both processes.

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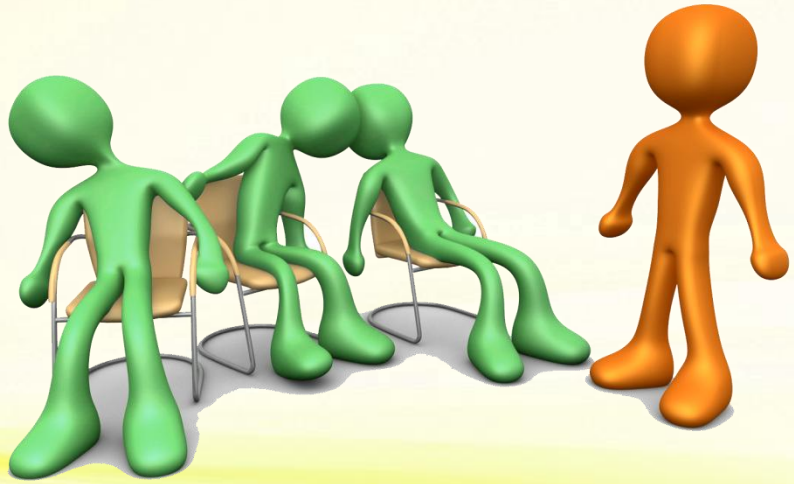
Change Classifications

- Start with:
  - Standard
  - Minor
  - Normal
  - Significant
  - Major
  - Emergency
  - Specific Types – i.e. Software Request



- System should be set up to use other Request Classifications, such as Service, Application, Hardware, Resolution.

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Questions

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The End

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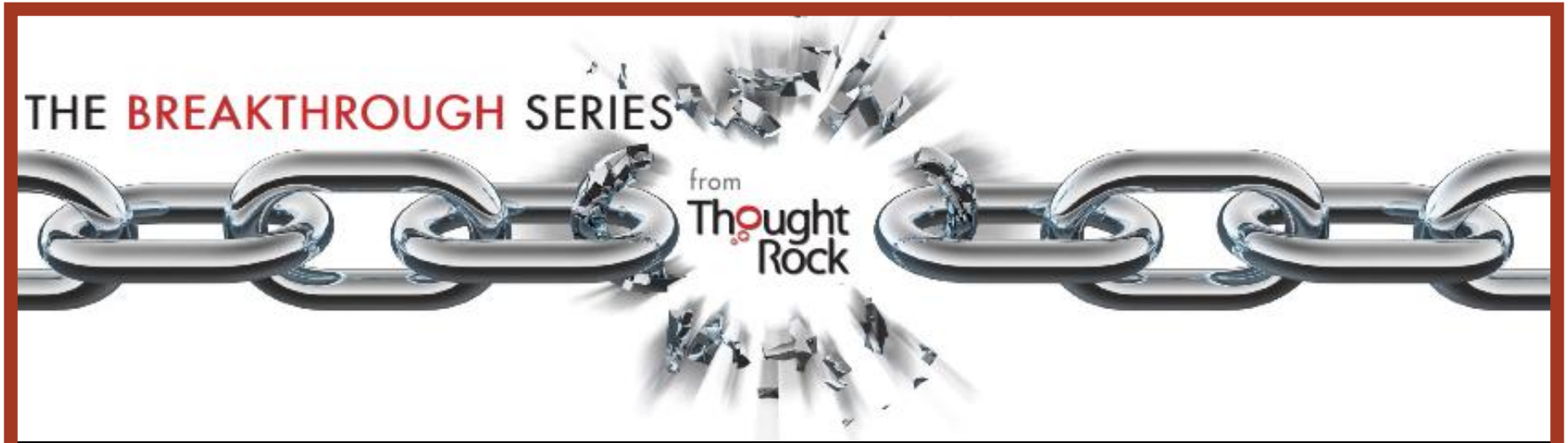

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