

THE **BREAKTHROUGH** SERIES

from  
**Thought  
Rock**

# Process Design: Change Management



**Graham Furnis, Senior Consultant  
ITIL Service Manager and Expert**

**B Wyze Solutions**

# So what's the Challenge?

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“I see the ITIL generic process model, but how do I make this fit our organization?!”

“I've taken ITIL classes and read the books, but I still don't know how to build my own process”?!

“How do I continue to evolve my processes”?!

# Agenda

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- What are we Managing?
- What's the Change Goal?
- What's the Change Scope?
- What do we need to be successful?
- Process Documentation
- Wrap up

# So What are we Managing?

- Service Change:
  - The addition, modification or removal of a Configuration Item (CI)
- Configuration Item (CI):
  - An authorized, planned or supported IT **Service** or its hardware and software **Components** along with associated **Documentation**



# But What are we Really Managing?

- **Business Impact!**

- The degree of ***both positive and negative effect*** on the organization

- What are Negative Effect Changes?

Changes that either:

- ***fail*** to deliver the business benefits expected, or

- ***fail*** to function correctly, or

- cause other components / services to ***fail*** to function correctly



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# Change Management Goals & Objectives

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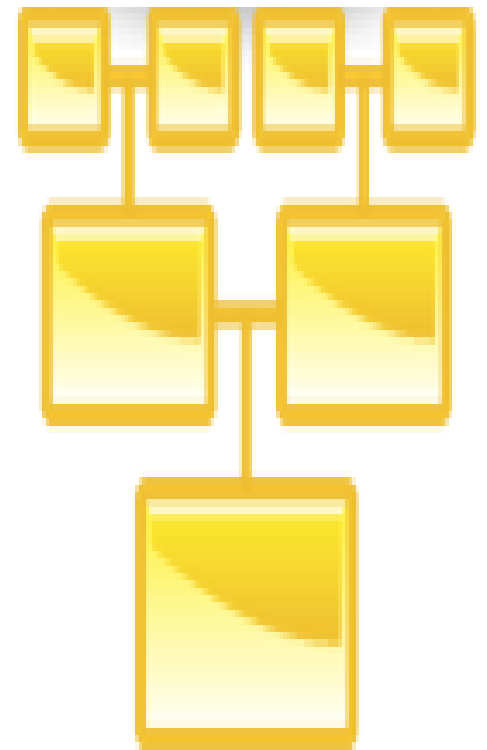
- Respond to the customer's changing business requirements
- While...
  - Maximizing customer value
  - Minimizing disruption to IT services caused by incidents, disruption and re-work
- By completing changes in a controlled manner
  - Changes are recorded, evaluated, authorized, prioritized, planned, tested, implemented, documented and reviewed

# Scope: How Much to Include?

- Scope is an Important Factor...
  - IT Services
  - Processes
  - *Any other items whose impact needs to be under change control*
  - Configuration Items
  - Documentation
- However....Not all Changes are Equal
  - The more you manage the less successful you are
  - Some Changes are more important than others

# Scope: How Much to Include?

- Three Basic Change Types:
  - Standard Changes
    - Pre Approved and Delegated
  - Normal Changes
    - Centralized Assessment and Control
  - Emergency Changes
    - Rapid Centralized Assessment and Control



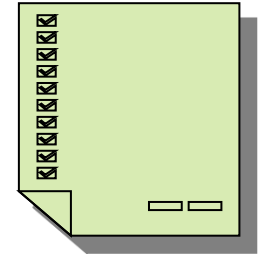


# How are we Managing Changes?

## Success Factors...

### A Good Service Management System (SMS)

- Used for “searching and matching” previous or similar incidents and accessing knowledge



### Priority Tables of Impact and Urgency

- Priority = Impact x Urgency

### Categorization Tables

- No more than 4 levels deep and 5 wide



# How are we Managing Changes?

## Success Factors...

### Asset and Configuration Management

- Critical to identifying “what is important” to be managed and controlled by Change

### Release and Deployment Management

- Critical to achieve the Change goal of making effective changes (good quality) that are aligned with and meet business objectives

### Incident Management and the Service Desk

- Critical to integrate this monitoring process that detects change failure



# How are we Managing Changes?

## Success Factors...

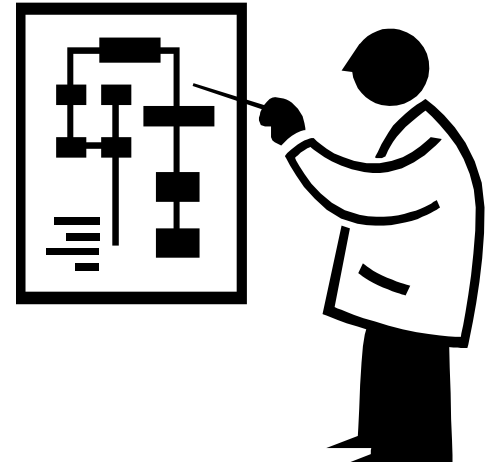
### Change Evaluation and Authorization

- Change Management
- Change Advisory Board (fixed and variable)
  - Business
  - Technical
- Emergency Change Advisory Board
- Stakeholders...



# Process Documentation: From What Perspective?

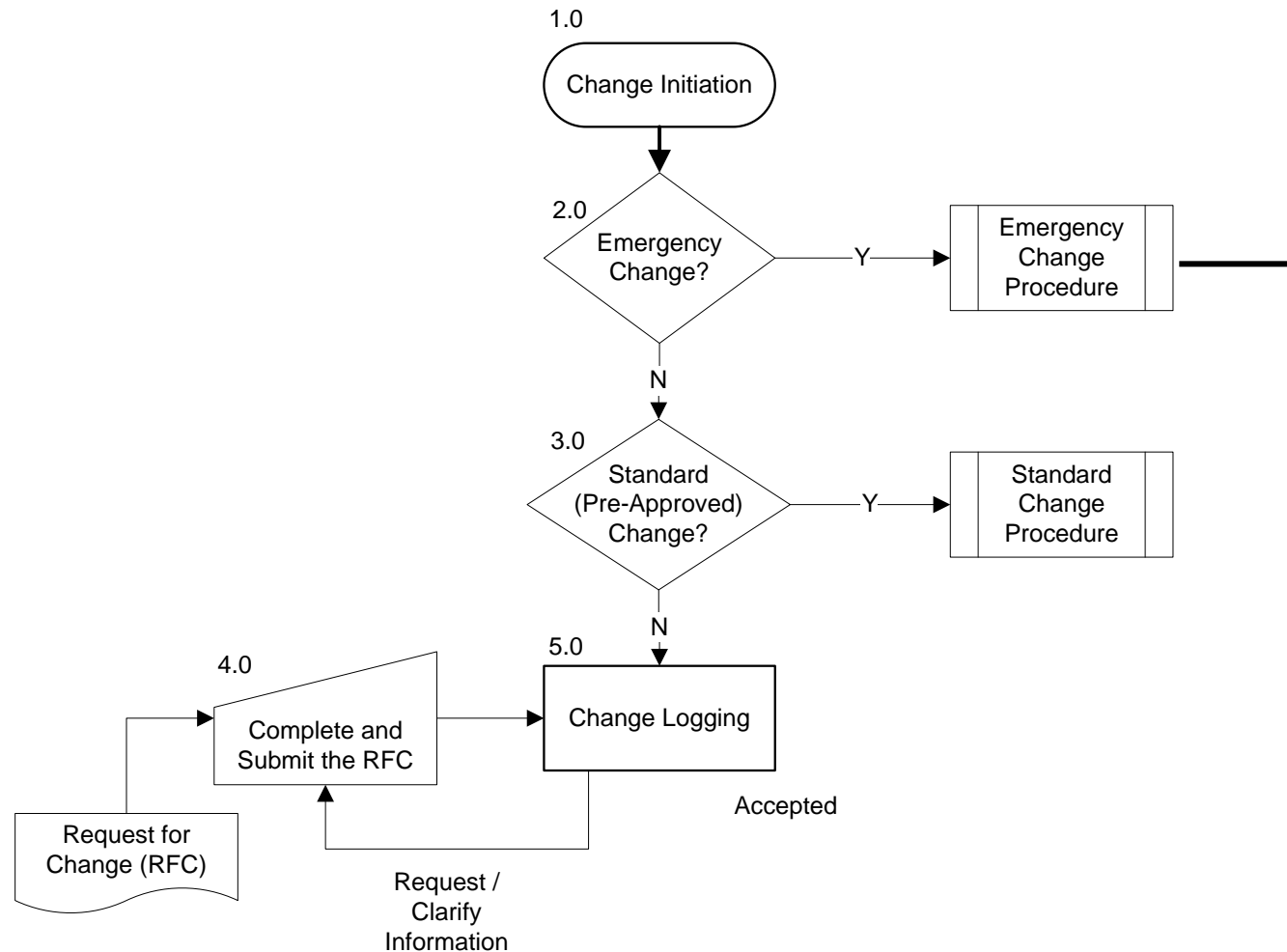
- This presentation and associated ThoughtRock Template focuses at the **Activity Level**
  - These are activities that “manage” the “Problems”
  - This is done at a generic process model level



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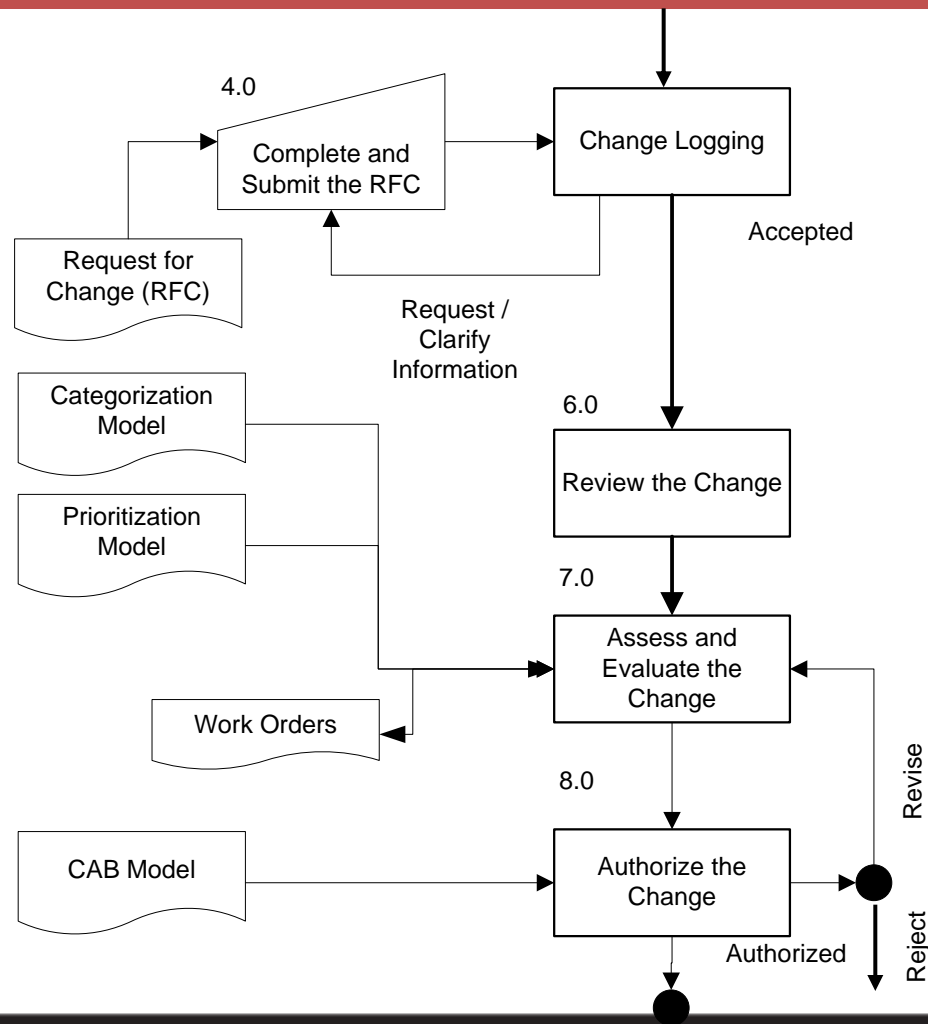
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# A Walk-Through Example: Activity Flowchart - 1



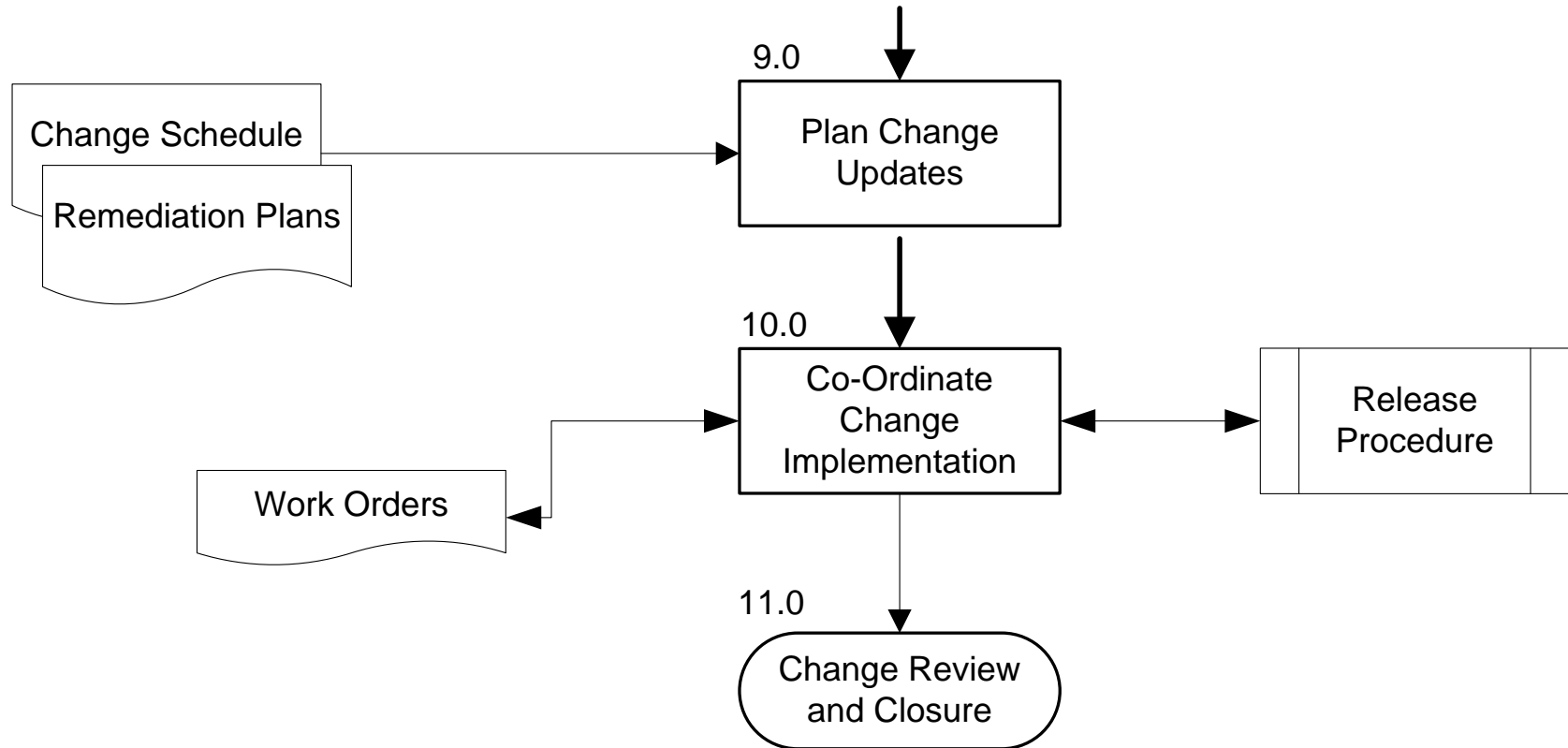
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# A Walk-Through Example: Activity Flowchart - 2



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# A Walk-Through Example: Activity Flowchart - 3



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# A Walk-Through Example: Define your Activity Roles Catalog

- Change Owner
- Change Manager
- Change Requestor
- Change Coordinator
- Technology Stakeholders
- Business Stakeholders
- Change Authority
- Change Advisory Board (CAB)
- Emergency CAB (ECAB)
- Emergency Change Team Lead
- Change Analyst
- The Service Desk
- Incident Management
- Request Fulfilment
- Problem Management
- Configuration Management
- Release and Deployment Management

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# Summary

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- Define your Change Goals and Scope
- Manage Change Impact for success (minimize failure)
- Manage Scope by using the three basic Change Types
- Use a good enterprise-wide ticketing system that links related processes of Incident, Release, and Configuration
- Appropriate stakeholders for Assessment and Review
- Publish the process and walk through with stakeholders

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