

Optimize Your Change Management Process

Let your battle with change-related incidents begin!

Infrastructure Managers and Change Managers to re-evaluate their Change Management process. They are suffering from much of the following:

- Too many change-related incidents.
- Slow change turnaround time.
- Too many unauthorized changes.
- Difficulty evaluating changes.

Pick your battles wisely.

You need to design a process that is flexible enough to meet stakeholder demands for change and strict enough to protect the live environment from change-related incidents. Before you begin, assess current process success and identify major gaps. You may not need to create the Change Management process from scratch and you can gain significant value by addressing problem

A perfectly designed Standard Operating Procedure (SOP) for Change Management will not protect your live environment if staff do not participate in the process.

ITIL provides a useable framework for Change Management, but full process rigor is not appropriate for every change request.

Remember that the purpose of Change Management is to minimize user disruption and change-related incidents, rather than to create extra paperwork. Once a good process is in place and workflows are established, you will be able to increase the pace of change and not slow it down.

Start with ITIL, but do not try to implement it perfectly. Your process will need to be adaptable to different types of change and different levels of urgency.

Stakeholders often resist Change Management because they see it as slow and bureaucratic.

It is critical to balance the needs of the stakeholder requesting the change with the risk that the change poses to the infrastructure. An emergency change request (CAB) meeting, but you still need to assess it before it is deployed. Your process must be flexible enough to respond to all types of requests.

Phase 1: Project Foundations

1.1 - Project Rationale

Change Management is not the same as change control. It is not in place to slow the pace of change; it is in place to allow you to apply change faster without threatening the live environment.

1.2 - Launch the Project

Treat the SOP as a project and leverage the right skills to complete it faster.

1.3 - Identify Your Current/Target State

Perform a current state assessment to scope your project. Depending on the strength of your process, you may be able to jump ahead to a specific process area instead of completing the entire SOP.



Phase 2: Design SOP

2.1 - Design the Intake Process

If your intake process is strong, you should still review roles and responsibilities to ensure that the right process owners are in place.

The Change Manager is not a coordinator or administrator. He or she owns the process and must have enough cross-functional knowledge to understand the potential impact of changes on both IT and the business.

2.2 - Design Change Assessment Process

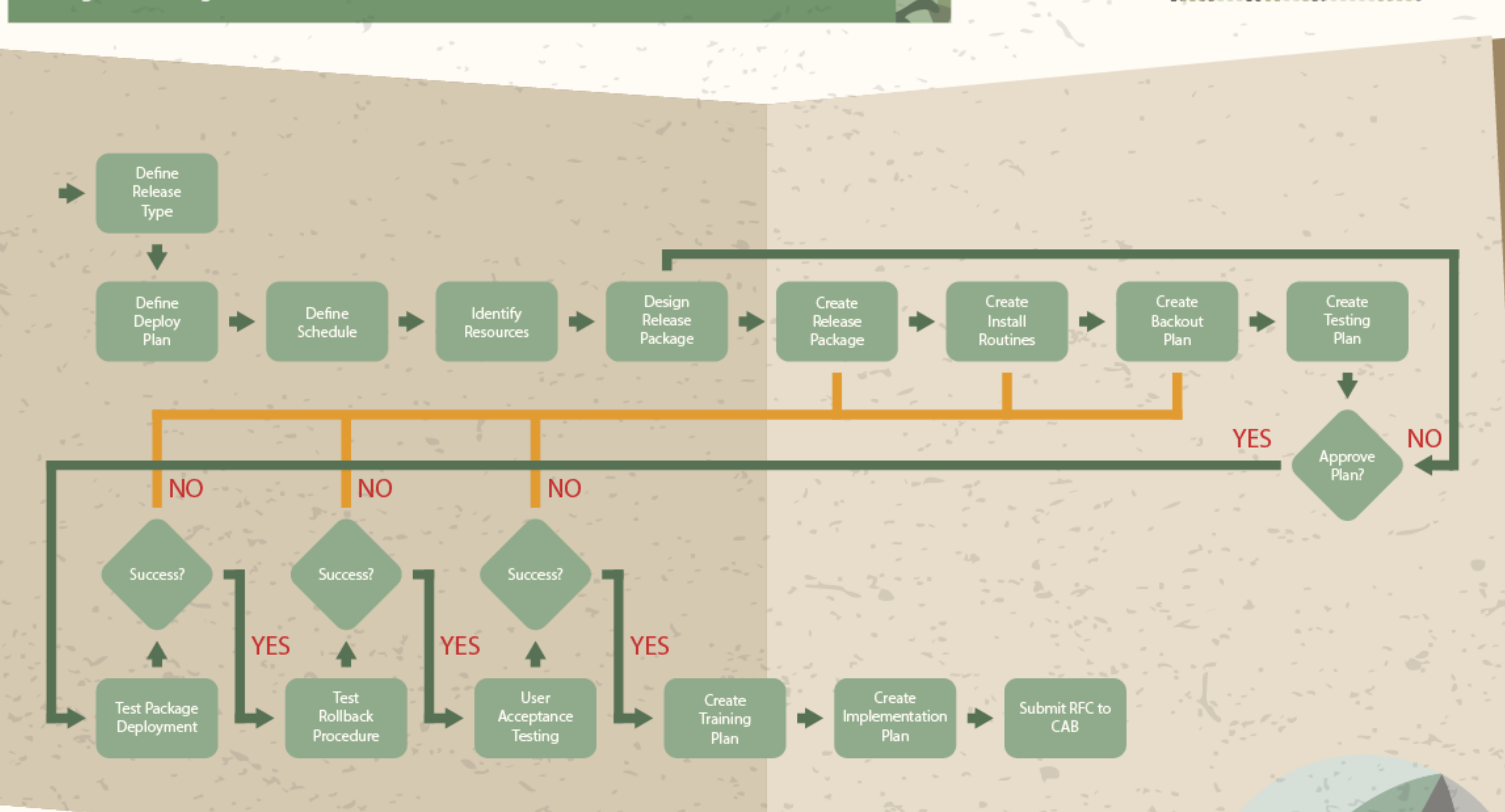
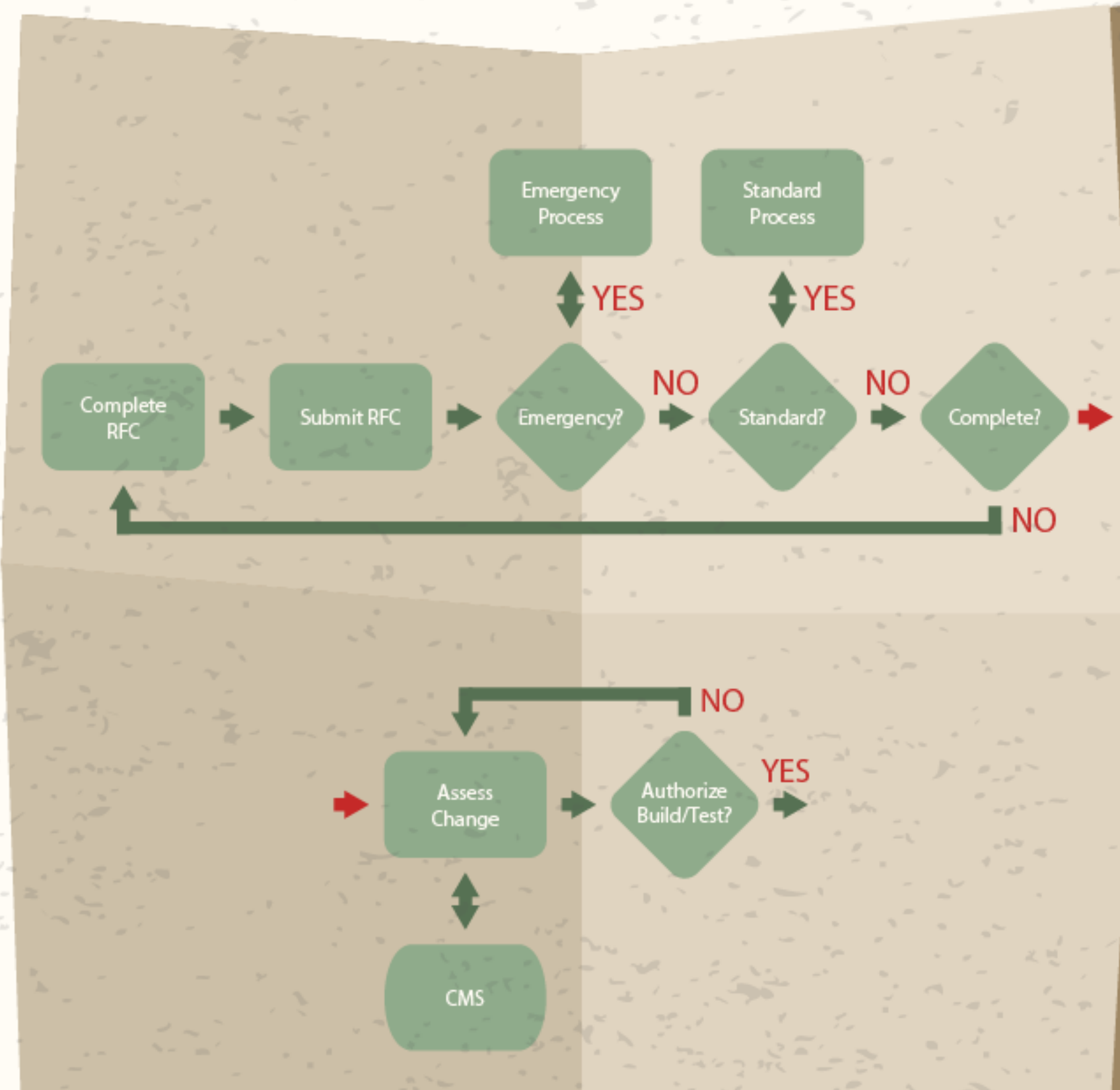
Change assessment should be focused on impact – both the potential negative and positive impacts of the change.

Getting this phase of the process in order presents an opportunity for a quick win; create a culture where every change is assessed for impact and reduce incidents even if your CAB is not yet established and approving changes.

2.3 - Review Plan/Test Process

Most of these activities fall under Release and Deployment Management, but it is important that your process includes them to ensure that working on changes is adhering to the same standards and protocols.

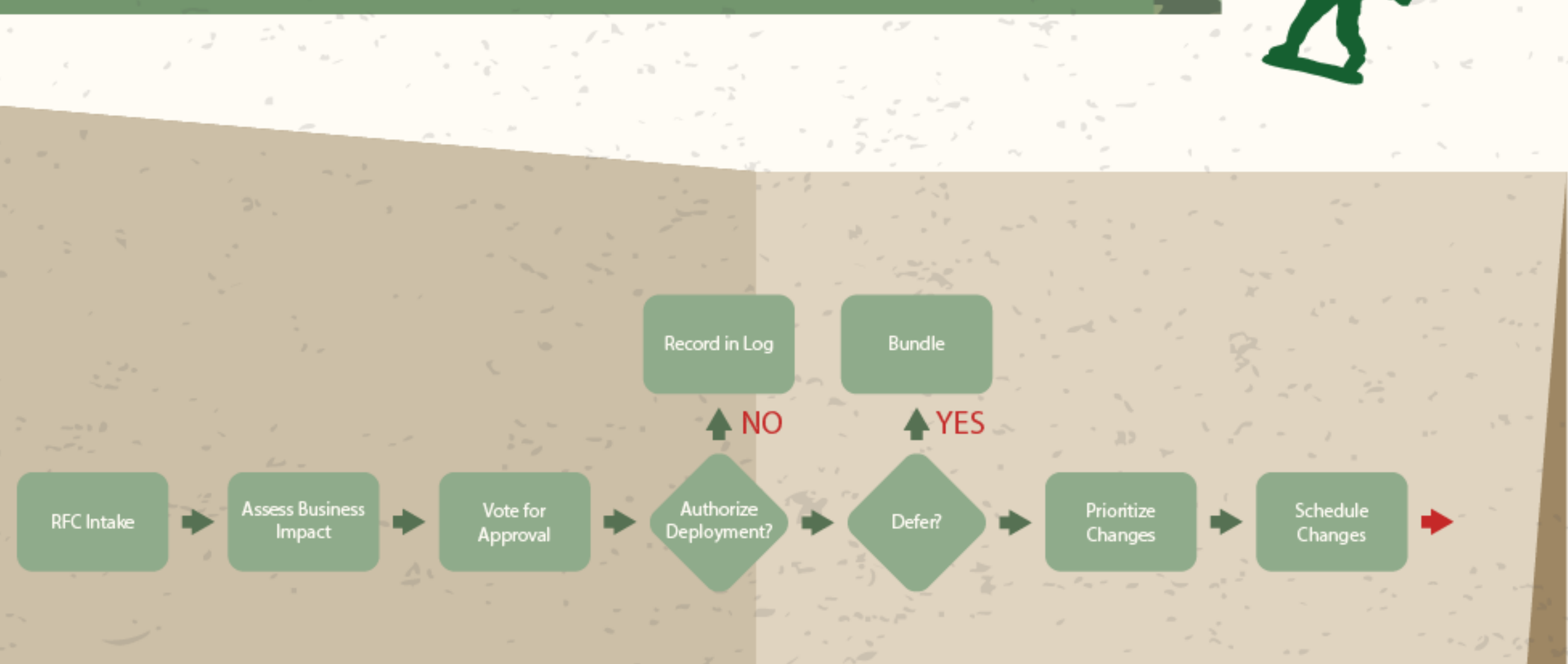
If this process area is strong, simply ensure that you have agreed upon the documentation required by the CAB to formally approve the request for change (RFC) (e.g. test results).



2.4 - Establish CAB

This is a critical step. You need a governing body to oversee approval and prioritization of changes. Even if your CAB is small, take the time to formally establish and empower one.

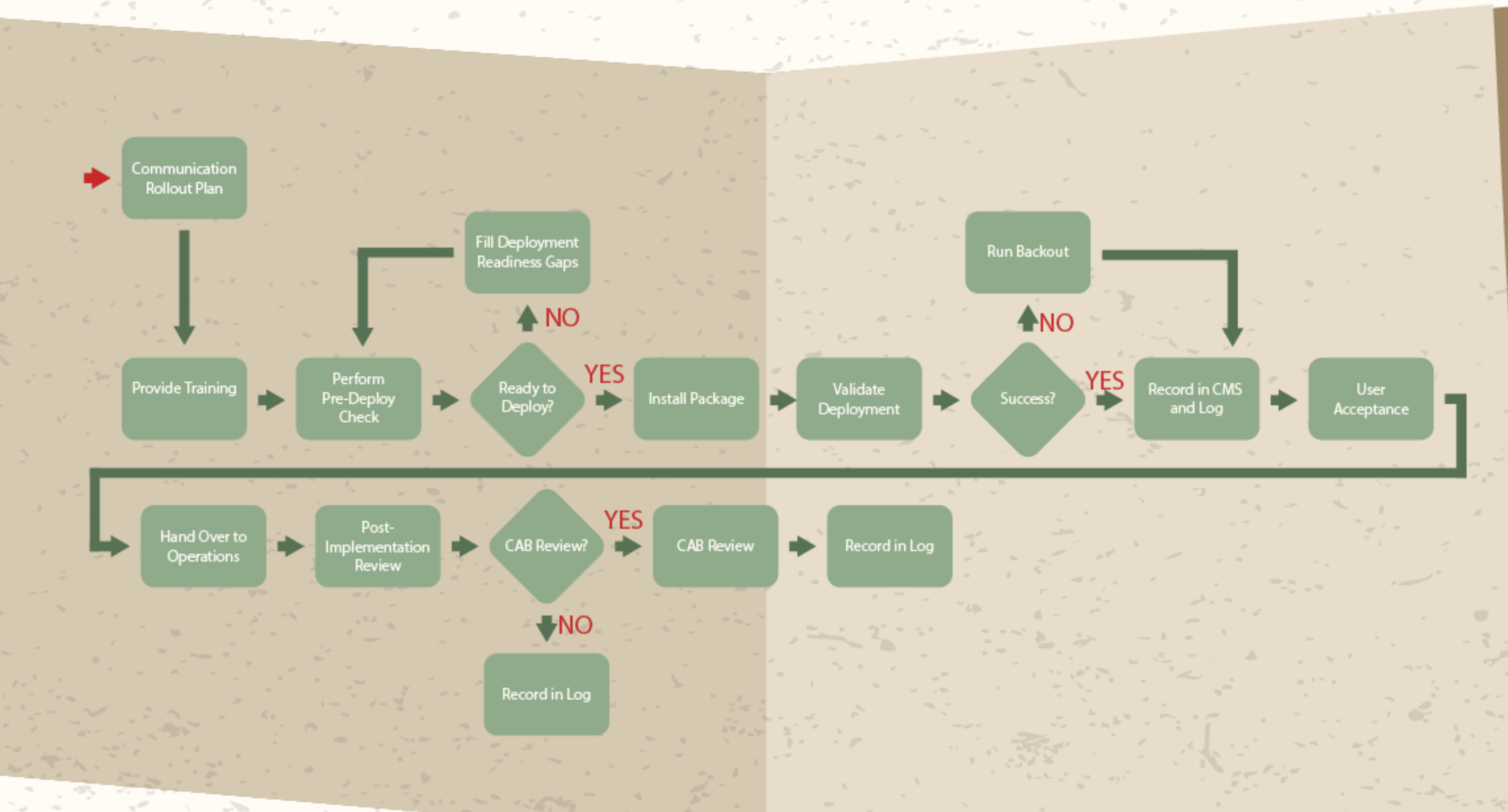
The detailed assessment of changes should be completed prior to the CAB meeting; the value of a CAB is in increasing IT and business visibility into upcoming changes and ensuring the changes are scheduled in a way that minimizes conflict and disruption and meets business need.



2.5 - Design Deployment and Post-Deployment Process

Enforcing proper change communication is another quick win. By simply increasing user and staff visibility into upcoming changes, you can reduce disruption and increase business satisfaction with IT.

You should use the post-implementation review as an opportunity to continually reassess your processes.



Phase 3: Implement the

Communication is key: Even if you have only worked to re-design one or two process phases, you need to communicate with users in IT and the business to ensure the new process is supported and adhered to. Otherwise, your work on the SOP will go to waste.

