



The World of Change, Configuration & Release Management

The Challenge of Informal CC&RM in a Retail Banking Environment

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Presentation Overview

- Background
 - Organisation
 - Production System Focus
 - System
 - Role
- Issues
- Organisation Change
- Action Plan

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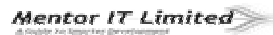


Bank of Ireland UK FS

- Bristol & West
 - UK arm of Bank of Ireland
 - Employs over 4000 staff.
 - Consumer & Business Banking services
 - Separate IS functions supporting each business unit
- April 2004 Strategic Decision for UK FS Division:
 - Operational Cost Savings
 - Migrate to centralised divisional manufacturing model.
 - benefits of scale through reuse and specialist areas
 - Create a level of repeatability into processes
 - Ensure compliance to industry bodies
 - e.g. FSA, Sarbane Oxley.
 - Support business growth

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Production System Focus

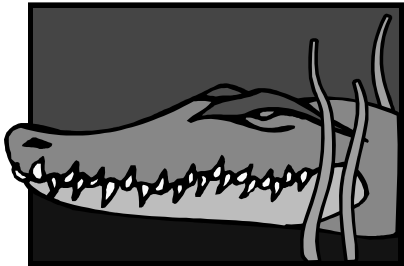
- Production (Live) System
 - Change Management via Remedy Application
 - Help Desk incident management
 - Change Request management
 - ITIL Compliant
 - Outsourced Service management
 - All changes subject to CAB Approval
- Application Development
 - Informal CM
 - Business Requirement Change via Change Board
 - Change visibility within development teams
 - Code Change via Changeman DS (Serena).
 - Build Change Management via Remedy
 - No link to bugs or code releases
 - Essentially used for tasking environment builds
 - Informal collaboration with production support.

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Issues



- Build Failures
- Perceptions
- Compartmentalisation
- Process
- Organisation
- CM &RM Support Tools
- 3rd Party Software

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Building Your Future Through Development

Build Failures

- Cause
 - Wrong component versions
 - Incorrect task sequence
 - Success dependant on the knowledgeable few
 - Point of failure occurred in use
 - Developer script failures
- Resolution
 - Formal review of component release documents
 - Standardise task list
 - Transfer knowledge into:
 - task list
 - Automated scripts
 - QA Build process

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Perceptions

- Organisational Perception of CM Role.
 - Environment Build Team
 - Development Process belongs to developers (Hands off)
 - Change Control jurisdiction of business & development
 - Deliver Test & Development Environments to order.
 - Any delays or failures due to CM build team.
- CM Team Perception
 - Unpredictable build time
 - Defective components
 - Unscheduled component releases
 - Unscheduled changes
 - Success dependant on the knowledgeable few
 - DBA, OSG, Citrix,
 - Developers
 - Build Team always to blame

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Compartmentalisation

Several Project Learning Reviews identified the lack of "End to End" CC&RM due to the organisational separation between support, development, testing and application delivery.

- Separate informal change processes for:
 - Business change
 - Development *
 - Support *
 - Production
- Asynchronous communications between:
 - Business
 - Development *
 - Support *
 - Production

* Challenge to set up change control across these areas

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Process

- Development Issues:
 - No common set of procedures
 - Reliance on:
 - Prince 2 training
 - Skills of the individual
 - Use of Changeman CM Tool.
- Resolution
 - Identify failures occurring through lack of procedure
 - Work with teams to develop procedure to meet needs.
 - Obtain procedure sign off by wider community.
- Resistors:
 - No process owner
 - Slow to obtain sign offs.

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Organisation

- Issues:
 - Decision making structure
 - Development & Support
 - Separate line managers
 - Independent areas
 - No high level CM
 - Isolated Towers of development.
- Resolution:
 - Open the gates into the Towers
 - Link Project to CM and Quality
 - Leverage Release Management Role.
 - CM Evangelism

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CM & RM Support Tool.

- CM Support Tool:
 - No application structure
 - Defect Management independent MSAccess Application 'owned' by Testing
 - Remedy used for Change Management
- RM Support Tool
 - No concept of code promotion
 - Deployment by series of manual drag & drop actions
- Resolution:
 - Automation
 - Build process
 - Code promotion
 - Integration
 - Ability to track bugs from open to code fix to code release to deployment
 - Similar for new requirements
 - Re-evaluate
 - Is this tool appropriate for the business
 - Tweak or replace?

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3rd Party Application

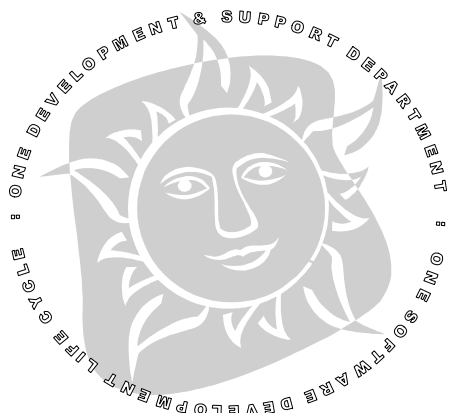
- Issues:
 - Over 150 defects
 - No defect clearance plan
 - Poor relationship
 - Supplier will continue to fail
 - Supplier does not understand our business
- Resolution:
 - Business prioritise defects
 - Involve supplier in bank release planning
 - Gain commitment to resolve (e.g.) top 6 defects
 - Improve communication at all levels
 - Managerial
 - Release Management
 - Technical
 - Improve 3rd Party Defect tracking

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Software Development

Organisational Change

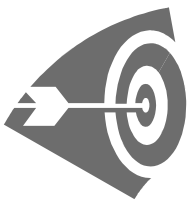


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Software Development

Organisational Change Goals



- Realise benefits of scale
 - Reuse / modularisation
 - specialist areas
- Process repeatability
 - Common framework
 - Adaptable implementation
- Controls
 - Constrain costs
 - Industry compliance
- Scalability
 - support business growth

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Organisational Change Requirement for CC&RM

- SDLC Mandated
 - One set of processes
 - Common framework
 - Adaptable Implementation
- Compatible Organisation
 - All applications in one IS Development & Support Department
 - Development
 - Minor Changes
 - Live Systems Support.
- CC&RM Centre of Excellence in Development & Support
- Migration from independence to a common approach
- Implementing 'enterprise' CC&RM.
 - Common CM processes
 - Configuration auditing
 - CI identification & Labelling
 - A CM Tool for all systems?
- Implement Project Metrics
 - CIs as deliverables
 - Status Accounting for metrics

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Action Plan

- CM Strategy:
 - Plan for CC&RM harmonisation
 - Raise CC&RM Awareness
 - Phased regulation of applications
- Tactical Activities:
 - Driving CC&RM into SDLC
 - Configuration Audits
 - Establish UK Platform wide Release Management Program
 - Automation / CC&RM Resource Management
 - Evaluate CM Tool against new organisational requirements



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Thank you

- Any Questions?

- Speaker information
 - John Metcalfe, Mentor IT Ltd.
 - The Guide For Smarter Development
 - consult@mentor-it.ltd.uk
 - Mobile 07971 817 651
 - Tel: 01524 32797

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