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## Change Management in ITSM

*Why embracing Service Management to Manage Change in your IT Infrastructure is Critical to Success"*

Don Page  
marval-group.com

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## Speaker Industry Credentials – Don Page


- 1 Co-author of ITIL (worldwide best practice in ITSM)
- 2 Co-author of BS15000 (British Standard for IT Service Management)
- 3 Co-author of ISO 20000 (the first worldwide ISO Standard in ITSM)
- 4 Co-author BSI Code of Practice for ITSM (BS 15000-2)
- 5 ITSMF Life-Time Achievement award
- 6 One of the first BS15000 certified consultants
- 7 Award winning ITSM software & projects

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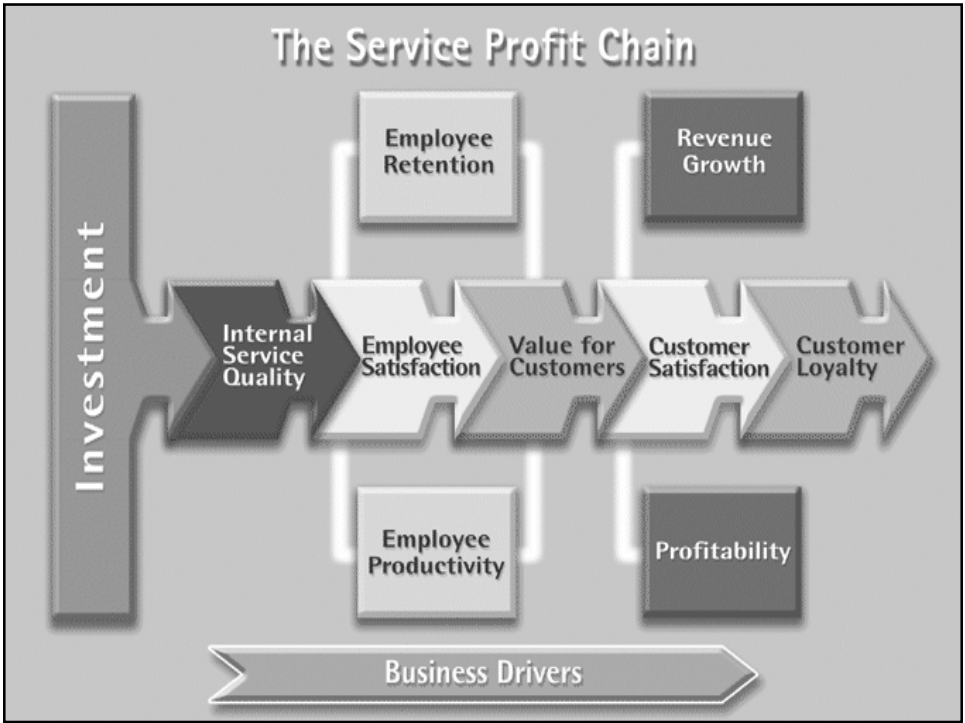
**Business Focus**

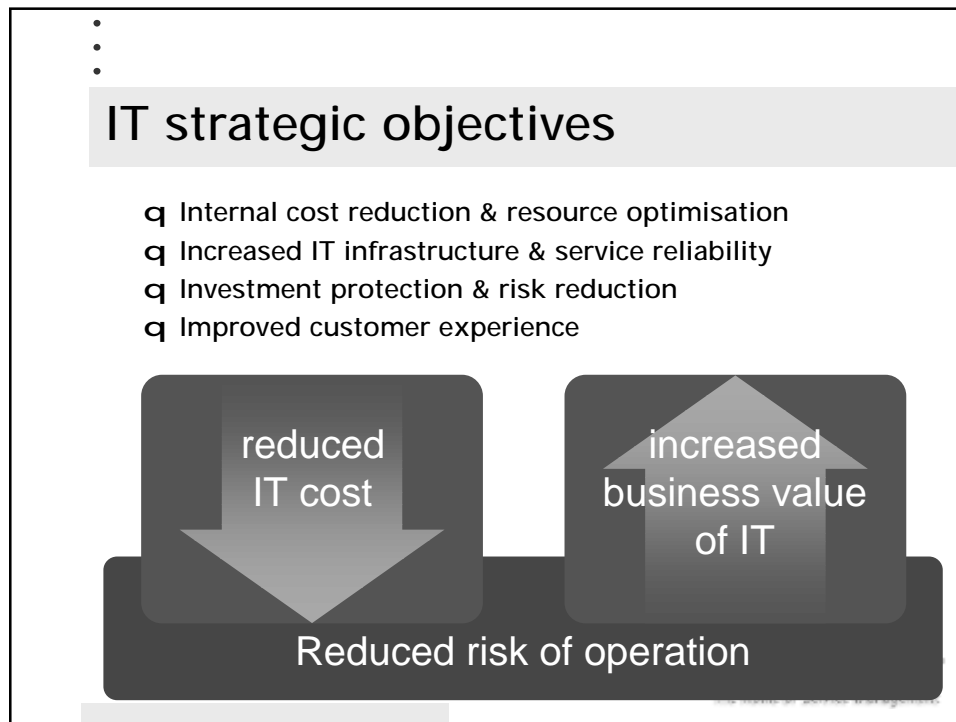
*”Seconds of computer downtime can result in thousands of unsatisfied customers & a significant drop in revenue“*



**“Providing a reliable, stable & well managed IT infrastructure is critical to success”**

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- ## Objective
1. Permit the absorption of potentially high numbers of changes whilst minimising adverse impact upon the quality of IT services.
  2. Ensure that all changes are introduced to the infrastructure on schedule & within the allocated resources.
  3. To avoid bottlenecks delaying the provision of new or amended facilities & functionality.
  4. To produce decision making reports for use by IT Service Managers highlighting any potential problem areas & ensuring that the effectiveness & efficiency of the Change Management process is being maintained.
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## Why is change management so hard?

1. No formal change process in place
2. Current process too bureaucratic
3. Cultural difficulties in getting support teams to accept a single Change Management system & process
4. Staff unclear what constitutes a change
5. Not understanding the impact & risk of change on related business services
6. Staff believe it's too much 'paperwork' & often quicker to "just do it".

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## Key Process Interfaces

### 1. Configuration Management

- All changes to Configuration Items (CI's) that affect nature, location or purpose must be properly authorised through the Change Management process.
- The accuracy of the CMDB (Configuration Management Database) assists accurate change risk assessment.

### 2. The Service Desk


- Be aware of impending changes so that they can keep customers informed & deal with any related incidents.
- Be aware of successful bug fix changes so that they can close all outstanding incidents.
- Understand what changes may have impacted the service (e.g. what happened over the week-end)

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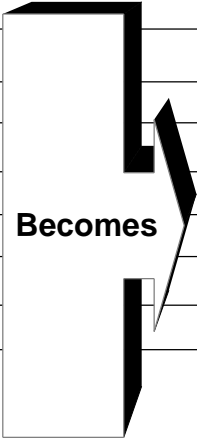
## Process Interfaces


1. **Problem Management** – process to aid better quality of changes
2. **Release Management** – helps on major change roll outs.
3. **Capacity Management**
  - Changes must be evaluated for their impact on capacity & performance.
4. **Service Continuity** – has veto on all changes affecting business continuity
5. **Service Level Management**
  - Impact on the quality and integrity of SLA's



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## My Service Transformation Approach

Traditional IT		ITSM Process
Technology focus	 <p><b>Becomes</b></p>	Process focus
'fire-fighting'		Preventative
Reactive		Proactive
Users		Customers
Isolated, silos		Integrated, enterprise wide
"one-off", ad-hoc		Repeatable, accountable
Informal process		Formal best practice
IT internal perspective		Business perspective
Operational specific		Service orientation

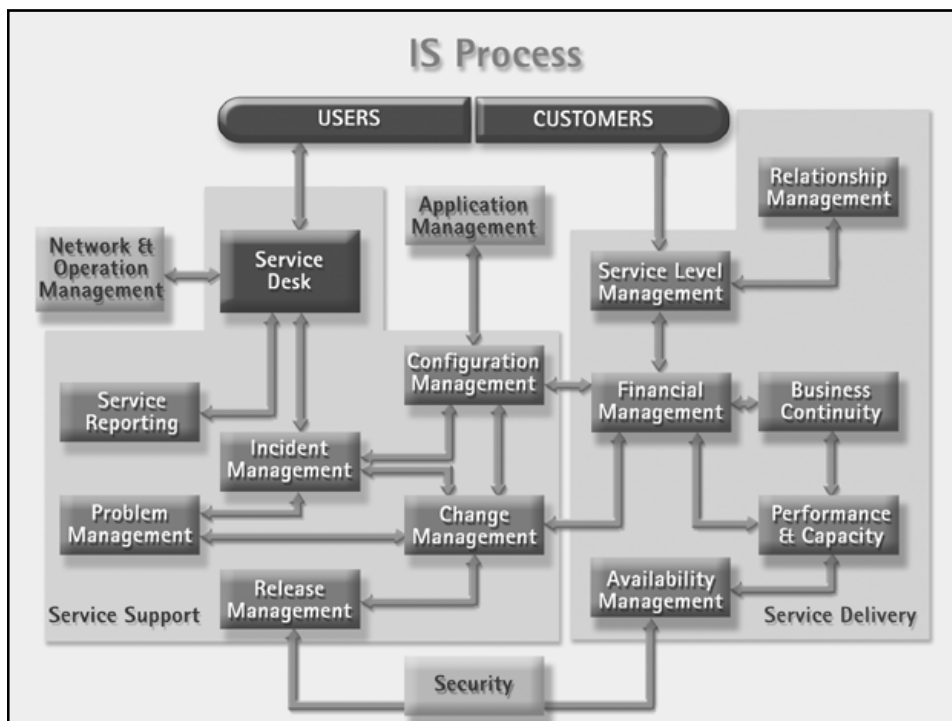


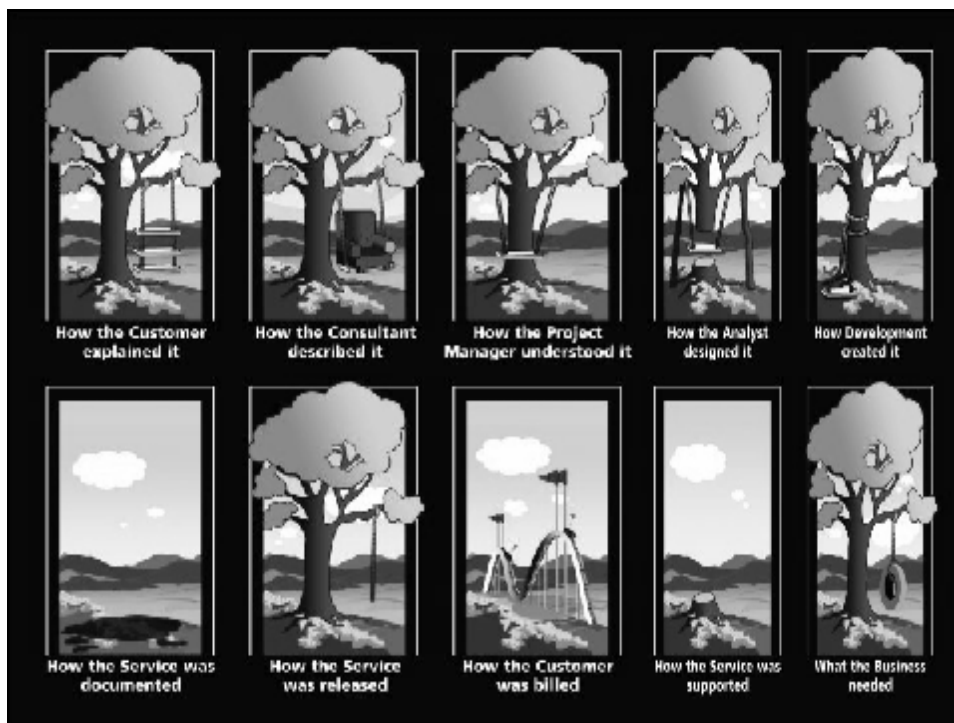
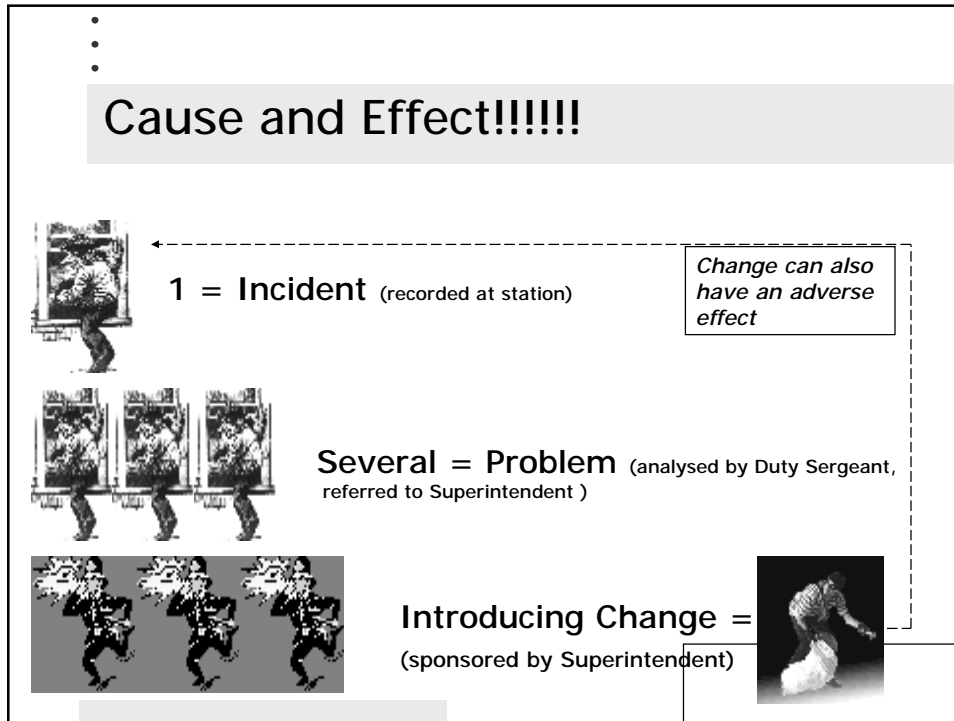
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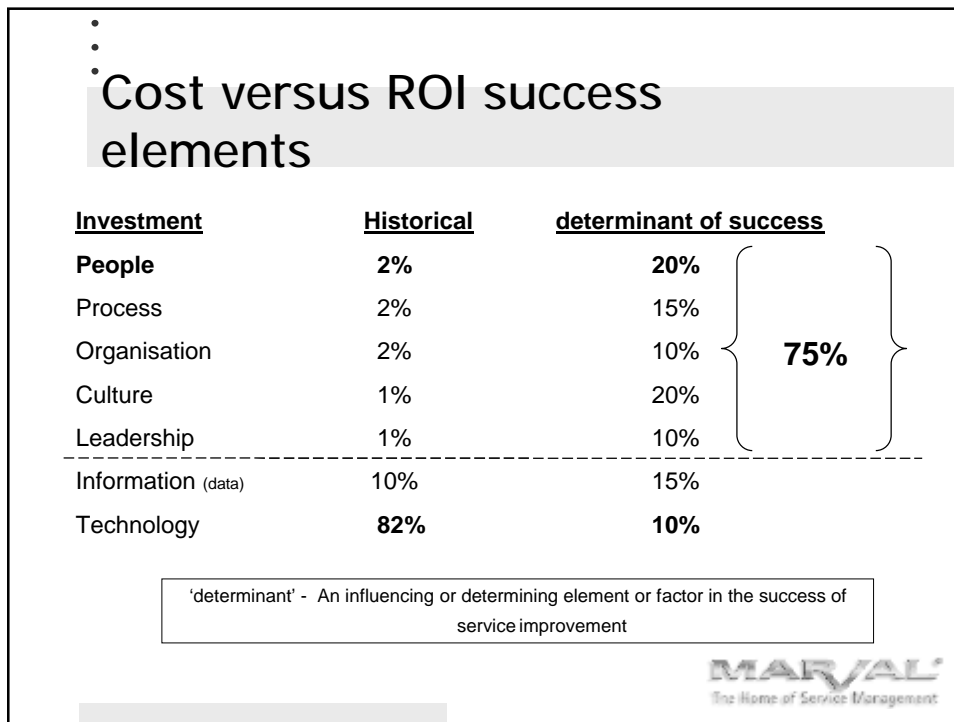
## Purpose of Change Management

1. The IT Infrastructure is in a constant state of change, whether to enable new requirements to be accommodated, errors to be corrected or problems to be solved.
2. Change Management is the discipline that is used to control that process
  - by understanding the risk of service failure by ensuring that it is minimised & understood.

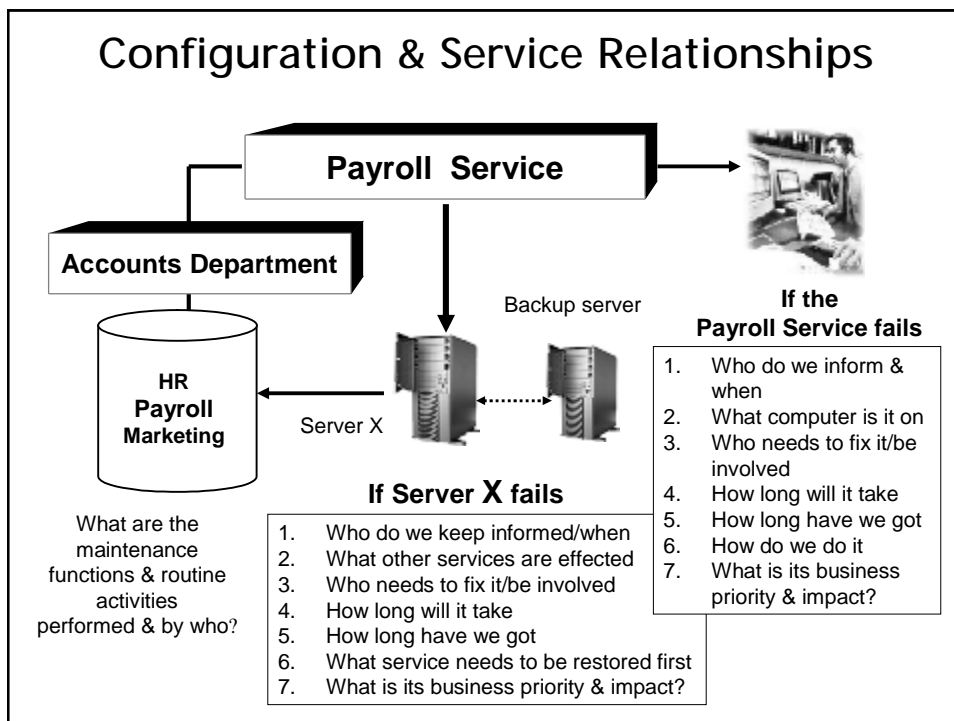
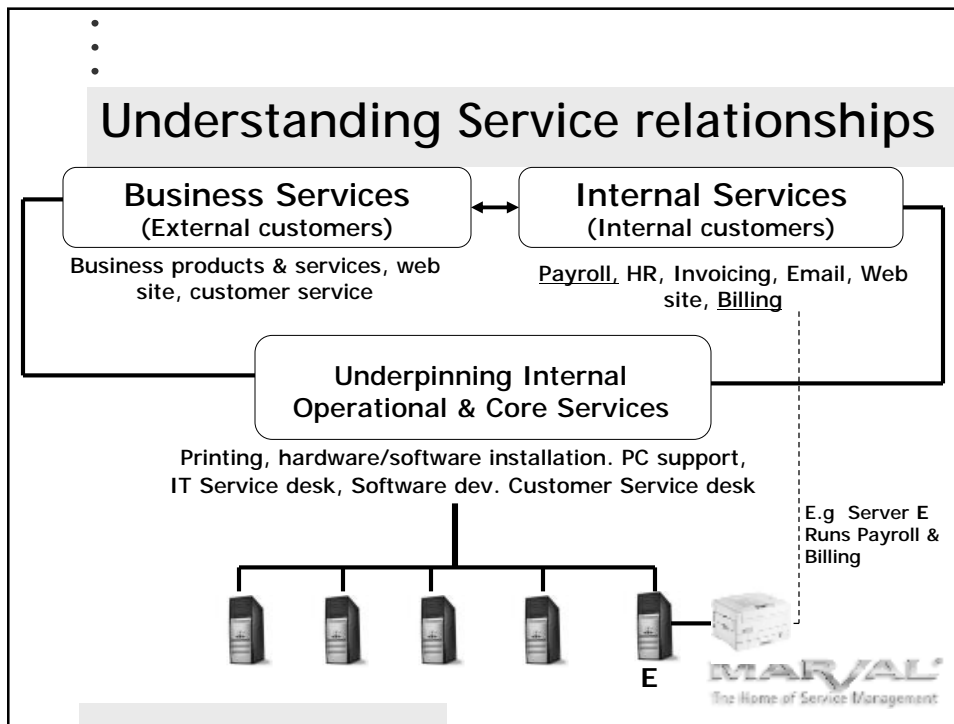
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- ### Change in the Business
1. Change Management occupies a position between the business customers & the IT organisation, & operates in the interests of both parties.
    - **The Business Customer** - Change Management is concerned with maintaining services by ensuring all changes are implemented in a controlled & structured manner with business approval when required.
    - **The IT Organisation** - Change Management is concerned with ensuring that the maximum numbers of changes with clear business benefit are implemented.
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## Making change easier

1. Split between high & low risk activities
  - **Changes:** high risk, requires high level approval
  - **Tasks:** well understood, low risk but still may require approval

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## Sample Changes

1. High impact / high risk
2. Untried & untested
3. Business approval required
4. Typically: -
  1. Major Software/hardware Installs/releases
  2. Introduction of new business service
  3. Configuration changes
  4. Major moves
  5. New projects
  6. Introduction of new system staff
  7. Update of critical process, procedure & documentation



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## Sample Tasks

1. Low impact / routine changes
2. Repetitive, tried & tested
3. Minimal approval required
4. Typically: -
  1. Software/hardware Installs
  2. Scheduled server re-boots
  3. New Starter Set-up's
  4. Equipment moves
  5. Update of standard process, procedure & documentation
5. Handled by team leaders



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## Simple actions to speed-up change

1. Allow web access
  - For low impact change registration
  - Management approval
  - Customer progress checking
2. Automatic Email to keep customers & support staff informed
3. Maintain CI & Service Relationships

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**Top 10 Change & Task Management Metrics**

1. Change trends within a pre-set period
2. Number of successful & failed changes
3. IT Component downtime due to changes
4. Service unavailability & costs due to change
5. Number of re-scheduled changes
6. Reasons why changes were not started or completed on schedule
7. Changes by business service
8. Emergency changes & reason
9. Top 10 changes by occurrence, elapsed time, time spent & business service
10. Number of related incidents and problems due to change

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**'Operational Rules' to Guarantee Success**

1. All changes shall be recorded, risk assessed, scheduled, documented & updated
2. All tasks shall be recorded, scheduled, documented & updated
3. All incidents shall be recorded, documented & updated
4. All problems shall be recorded, documented & updated
5. Time spent shall be recorded against each request
6. Reasons for failing to meet agreed targets shall be recorded
7. All critical service relationships shall be maintained & understood
8. Customers shall be kept informed
9. Support teams shall communicate
10. There shall be NO surprises (except nice ones)

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## Warning !

“You are at risk until the best practice principles of Change Management are firmly embedded into the psyche of the business culture “

*Don Page*

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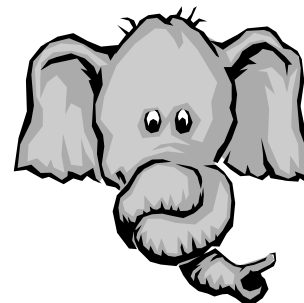
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## MOST OF ALL ...

### REMEMBER

1. Change is NOT something someone else can do for you
2. It takes Time & Effort
3. You're the one who has to do it!
4. Place controls where you really need them
5. Keep it Simple

There is always room for improvement!



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## The End

Don Page  
d.page@marval.co.uk  
marval-group.com

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