

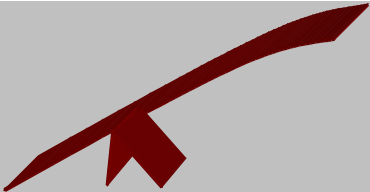
“Service Support”

Change Management



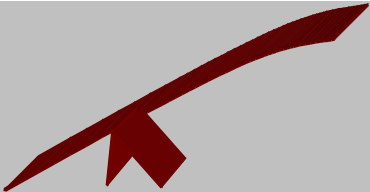
Module Objective

- ◆ Define the scope of the Service Support function of Change Management in the IT Infrastructure Library (ITIL)
- ◆ Provide an overview of the basic Change Management functions
- ◆ Show relationships between Change Management and
 - ◇ Incident Management
 - ◇ Problem Management
 - ◇ Configuration Management
 - ◇ Release Management
 - ◇ Capacity Management



Goals of Change Management

- ◆ Changes arise as a result of Problems
- ◆ Changes also can come from proactively seeking business benefits such as reducing costs or improving services
- ◆ The goal of the Change Management process is to ensure that **standardised methods and procedures** are used for efficient and prompt handling of all Changes, **in order to minimise the impact of Change-related Incidents upon service quality**



Goals of Change Management - 2

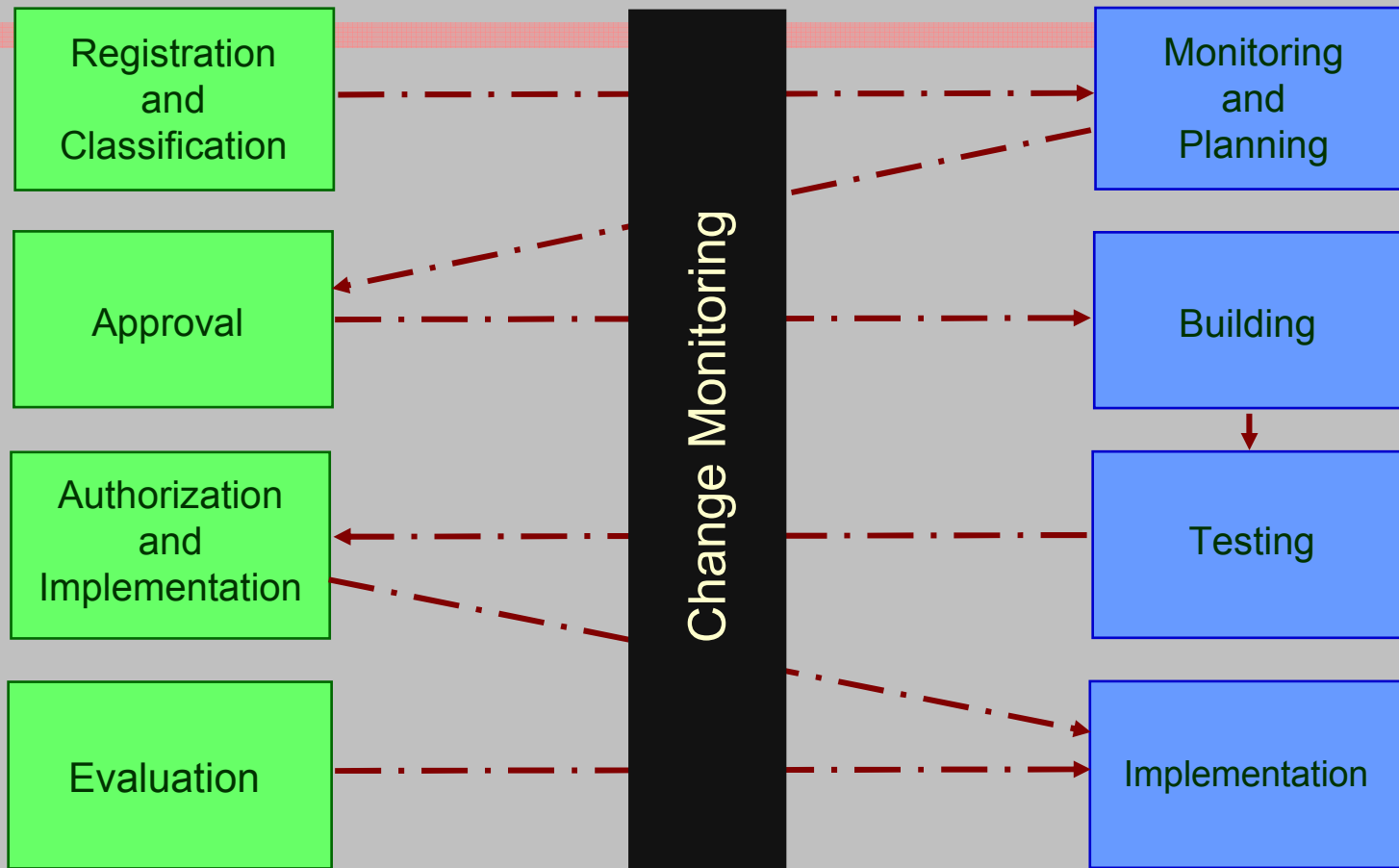
- ◆ To make an appropriate response to a Change request entails a considered approach to:
 - ◇ Assessment of risk and business continuity
 - ◇ Change impact
 - ◇ Resource requirements and change approval
- ◆ This considered approach is essential to maintain a proper balance between the need for change against the impact of the change



Change Management and Configuration Management

- ◆ It is generally accepted that Change Management and *Configuration Management* are best planned and implemented **concurrently**
- ◆ Implementing Change and Configuration Management concurrently allows the organisation to weigh the risks of not implementing either process properly at the planning stages

Change Management and Project Management





Scope of Change Management

- ◆ Change Management is responsible for managing change processes involving:
 - ◆ Hardware
 - ◆ Communications equipment and software
 - ◆ System software
 - ◆ ‘Live’ applications software (In production)
 - ◆ All documentation and procedures associated with the running, support and maintenance of **live systems**



Scope of Change Management - 2

- ◆ This means that changes to any components that are **under the control of an applications development project** – for example, **applications software**, documentation or procedures – **do not come under ITIL Change Management!**
 - ◆ These would be subject to **project** Change Management procedures
- ◆ The Change Management team will, however, be expected to liaise closely with Application Management project managers to ensure smooth implementation and consistency within **the changing management environments**



Scope of Change Management - 3

- ◆ NOTE: Change Management makes the process happen, but the decision authority is the Change Advisory Board (CAB), which is made up for the most part of people from other functions within the organisation
- ◆ NOTE: It is Configuration Management who is responsible for ensuring that information regarding the possible implications of a proposed change is made available, and that these possible impacts are detected and presented appropriately



Scope of Change Management - 4

- ◆ *Change Management* is not responsible for identifying components affected by *Change* or updating *Change Records* (the domain of *Configuration Management*),
- ◆ Change Management is not responsible for the *Release* of new or changed components (the domain of *Release Management*).



Scope of Change Management - 5

- ◆ **An Incident is not a Change!**
- ◆ A *Problem* may not lead to a Change
- ◆ A **Change** in infrastructure management terms **is the result of Problem fixing where there is 'a state different from a previously defined condition'**
- ◆ The *Change Management* process should ensure that any Change plans **include plans for back-out in the event of serious unforeseen problems**



Change Management

- ◆ The basic concepts of **Change Management** are principally **process-related and managerial**
- ◆ **Incident Management** is **primarily technical**, with a strong emphasis on the mechanical nature of some of the processes

Request for Change

- ◆ RFCs can be concerned with any part of the infrastructure or with any service or activity:
 - ◆ Hardware
 - ◆ Software
 - ◆ Documentation
 - ◆ Telecommunications facilities
 - ◆ Engineering cover
 - ◆ Training courses
 - ◆ IT infrastructure management procedures
 - ◆ Tactical plans
 - ◆ Environmental infrastructure





Change Review

- ◆ Change Management **must review all implemented Changes** after a predefined period has elapsed
- ◆ The purpose of such reviews is to establish that:
 - ◇ The change has had the desired effect and met its objectives
 - ◇ Users and Customers are content with the results, or to identify any shortcomings
 - ◇ There have been no unexpected or undesirable side-effects to functionality, availability, capacity/performance, security, maintainability etc.
 - ◇ The resources used to implement the change were as planned
 - ◇ The implementation plan worked correctly (so include comments from the implementers)
 - ◇ The change was implemented on time and to cost
 - ◇ The backout-plan functioned correctly, if needed

Change Advisory Board (CAB)

- ◆ The Change Advisory Board (CAB) is a body that exists to approve changes and to assist Change Management in the assessment and prioritisation of changes
- ◆ Its members should be chosen who are capable of ensuring that all changes are adequately assessed from both a **business** and a **technical** viewpoint
 - ◆ The CAB needs to include people with a clear understanding of the Customer business needs and the User community, as well as the technical development and support functions





Change Advisory Board (CAB) - 2

- ◆ Suggested CAB membership includes:
 - ◆ Change Manager
 - ◆ Customer(s) affected by the Change
 - ◆ User manager(s)
 - ◆ User group representative(s)
 - ◆ Applications developers/maintainers (where appropriate)
 - ◆ Experts/technical consultants
 - ◆ Representatives of all major areas within the Service Management process
 - ◆ Senior Users, or their representatives.
 - ◆ Services staff (as required)
 - ◆ Office services staff (where Changes may affect accommodation and vice versa)
 - ◆ Contractor's or third parties' representatives (as required – for instance in outsourcing situations)



Impact and Resource Assessment

- ◆ When conducting the **impact and resource assessment** for RFCs referred to them, Change Management, CAB, CAB/Executive Committee or any others who are involved in this process, should consider the following items:
 - ◇ Impact that the change will make upon the Customer's business operation
 - ◇ Effect upon the infrastructure and Customer service, as defined in the SLA, and upon the capacity and performance, reliability and resilience, contingency plans, and security
 - ◇ Impact on other services that run on the same infrastructure (or on software development projects)



Outsourcing and Change Management

- ◆ When outsourcing is under consideration, the receiver of services needs to take into account the following issues concerning the Change Management process:
 - ◆ Who is responsible for managing day-to-day changes arising from RFCs, from whatever sources
 - ◆ What control do I have over the service provider so that I am not being made to pay for unreasonable changes?
 - ◆ How do I know that changes are not approved piecemeal, with a consequent impact on service and service cost?
 - ◆ Who is responsible for ensuring that major business changes are properly costed, approved, planned, controlled and implemented?
 - ◆ Who is responsible for the integrity of systems and services following changes?
 - ◆ Has security of systems been properly considered?
 - ◆ Who should sit on the CAB?



Outsourcing and Change Management - 2

- ◆ The Buyer is responsible to ensure that service providers (outsourced or in house) provide the **change management** function and processes that match the needs of your organisation
- ◆ Ensure that you coordinate the Change Management, Incident Management, Release Management and *Configuration Management* processes across all of the organisations involved in service support, delivery and management