

***Change Management
Onboarding
March 17, 2010***



Change Management Onboarding

Agenda

- *Change Management Onboarding Talk – Mike Kaiser*
- *Release Management Preview – Alden Clifford*

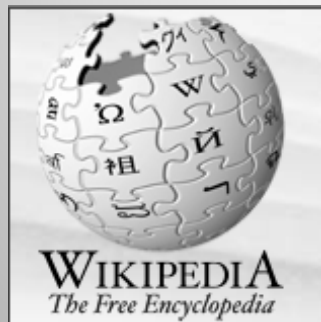


Change Management Onboarding

Onboarding

What is it?

Onboarding is the process of acquiring, accommodating, assimilating and accelerating new team members.





Change Management Onboarding

Change Management

What is it?

Change Management is an IT Service Management discipline. Its objective is to ensure all changes are assessed, approved, implemented and reviewed in a controlled manner. Change Management is governed by “shall” statements.

“Shall” have changes approved, verified and implemented in a controlled manner.



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Why are we doing this?

- *Change management has been shown to:*
 - *minimize the number and impact of change-related incidents*
 - *reduce the number of backed-out and failed changes*
 - *and consequently improve the day-to-day operations of the organization*
- *This is part of the lab's ISO 20000 Certification process.*



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What are we going to control?

Configuration Types

1. *Computer System*
2. *Service*
3. *Database*
4. *Application*
5. *Operating System*
6. *Business Entity/ Experiment*
7. *Documentation*
8. *Equipment (including Network Gear)*



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What can I expect and what is expected of me?

- You are asked to provide feedback on the guidance documents that will be provided if there are any issues/concerns.*
- Please let us know of any tool issues. Early groups helped debug the Change Management processes.*
- Configuration Item (CI's) will be "cleaned up" as they are changed (before the Request For Change (RFC) is entered into the Change Management System).*
- We are starting out slow. Each week additional Support Groups and Configuration Types are being added to the process.*



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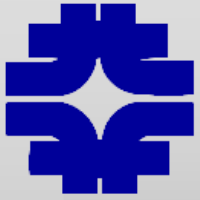
Before the RFC hits the Change Manager for approval

Your group is accountable for having substantially correct RFCs entered into the Change Management System.

- The Change Manager evaluates the overall change, but does not examine the technical details of every change.*
- Change Management is accumulating statistics on changes.*

Your group leader or line manager will provide initial approval.

- For “authorization to build”.*
- For “approval to implement”.*



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What's needed for Authorization to Build?

- Business Justification in plain language for a person in an oversight role - ***“Shall” have a clearly defined scope for service and infrastructure changes.***
- Change Risk Statement
 - Comparable Changes
 - High Level Plan (statement of tasks/milestones needed)
 - List of Relevant CI's / Change Constraints
- Valid Request For Change entered into the Remedy tool



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What's needed for Implementation Approval?

- Risk/Impact Assessment (***“Shall” assess risk, impact and business benefit of requests for change***)
- Test Plan and Results
- Implementation Plan
- Technical /Documentation Deliverables
- Communication Deliverable - should include:
 - Stakeholders to the change
 - Service Level Manager (or Customers)
 - Service Desk (or Users)
- Backout Plan (***“Shall” include the manner in which the change is reversed or remedied if unsuccessful***)

Note: Length of prose in these plans should be proportionate to the complexity and impact of the change. Plans should be small for small changes.

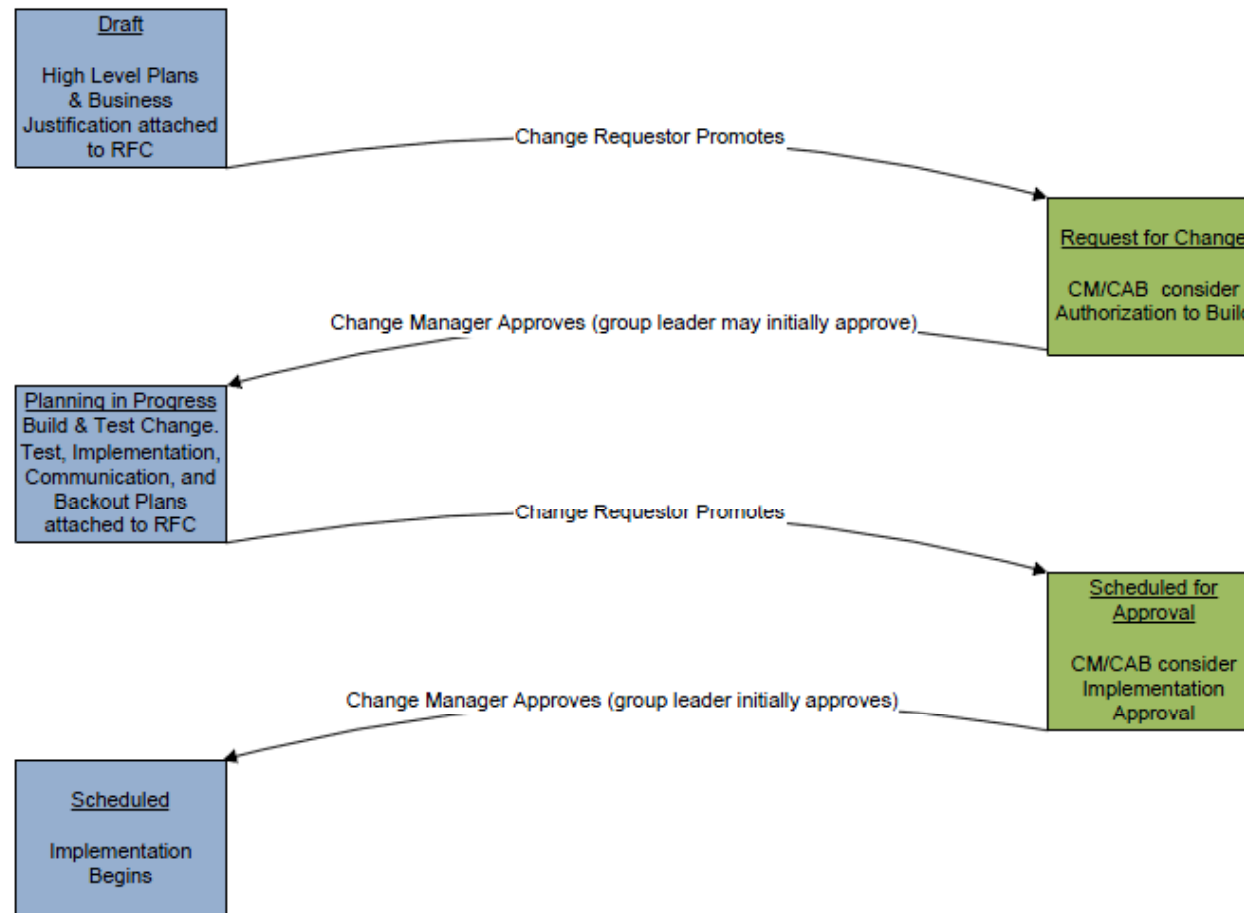


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Change Management Workflow

In Requestor's/Implementer's Queue

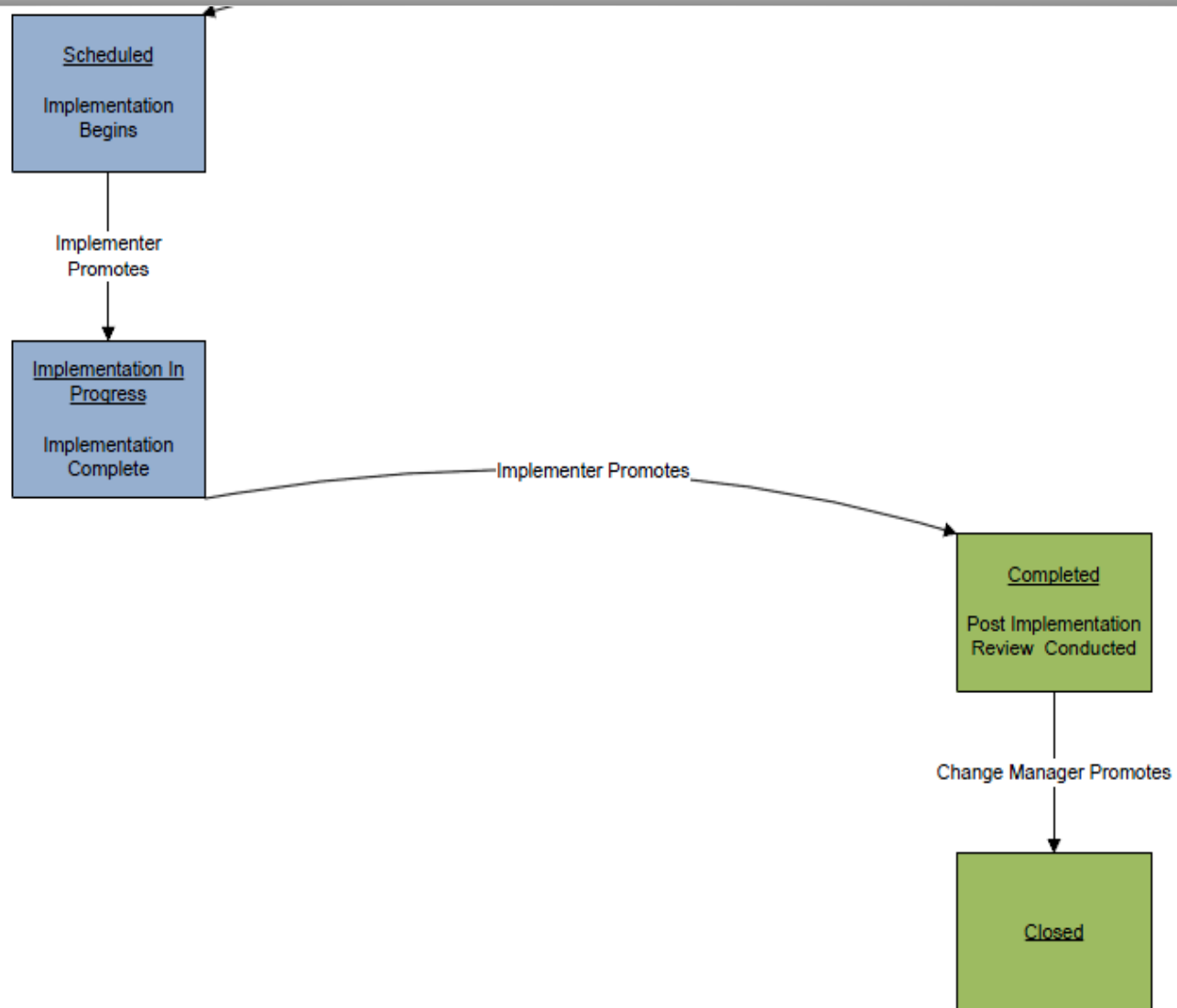
In Change Manager's Queue



“Shall”
have
scheduled
implementation
dates of
approved
changes
communicated to all
impacted
parties



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“Shall” have all changes reviewed for success and any actions taken after the implementation



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“Shall” record and classify all requests for change, examples include:

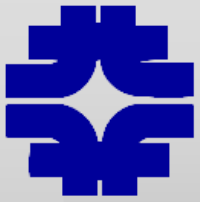
- Day-to day work will not be considered a change and will not be entered into the Change Management System.
- Normal Pre-Approved (Standard) changes will be pre-approved once they have gone through the process successfully and have been approved to become a Standard Change.
- Minor (Low Risk) changes will be approved by the Change Manager, but not usually discussed at the Change Advisory Board (CAB) meeting.
- Major (High Risk) changes will be discussed at the CAB meeting and approved by the Change Manager.
- Emergency ***“Shall” have policies and procedures that control the authorization and implementation of emergency changes.***



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What's next?

- You will receive further information in email including links to
 - This presentation
 - Change Management Tool Training
 - Approval and Risk Guidance Documents
 - Development Remedy System
- You will enter a “practice RFC” in the test system. Please try to get this done on or before this day next week.
- A meeting will be scheduled to discuss and negotiate your proposed work types (work, standard, minor, major).
- You will begin entering ALL “non-work” changes into the production system.



Release Management Preview

