knowledge17

http://clabs.link/LAB132001

WORK at LIGHTSPEED

Deliver Change Management Efficiency 201

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servicenow

Agenda

- Introduction – Speakers and Objectives
- Best Practices and Automating Changes
- Change Models – and Lab
- Assessing Impact & Risk – and Lab
- Extending the Behavior – and Lab
- Post Implementation Review – and Lab
- Recommended Labs
- Wrap Up



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Speaker Introduction



Name: Liz Fassone

Title: Solution Consultant

Function: Commercial team

Company: ServiceNow

Experience: 7 years Adept, 1.5 years ServiceNow

Expertise: Support, Training, Business Analysis, Change Control, Sales

Achievements: Implemented more than 40 sites in Australia, New Zealand, Singapore and UK; trained more than 250 people; Change control of SaaS-based product from inception to v6.8

Current Projects: ITSM specialist

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Speaker Introduction



Name: David Bourland

Title: Solution Consultant

Function: Commercial Team

Company: ServiceNow

Experience: 2 years at ServiceNow, 14 years at VzW, IoT

Expertise: Facilities, project portfolio, CSM, business processes

Current Projects: Connecting automated responses to ServiceNow from machines, B2C to field services and CMDB population.

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Objectives and What You Will Learn

Objectives

- Understand best practices and leverage ServiceNow to transform change management into a streamlined and standardized process
- Ultimately improve change management efficiency

What you will learn

- Understand how ServiceNow can empower your change implementations
- Create templates to automate repetitive actions
- Allow End Users to submit standard changes quickly and easily
- Quickly identify risk, impact and collisions
- Tailor the process relevant to your business
- Know what works – and what doesn't – with Post Implementation Reviews

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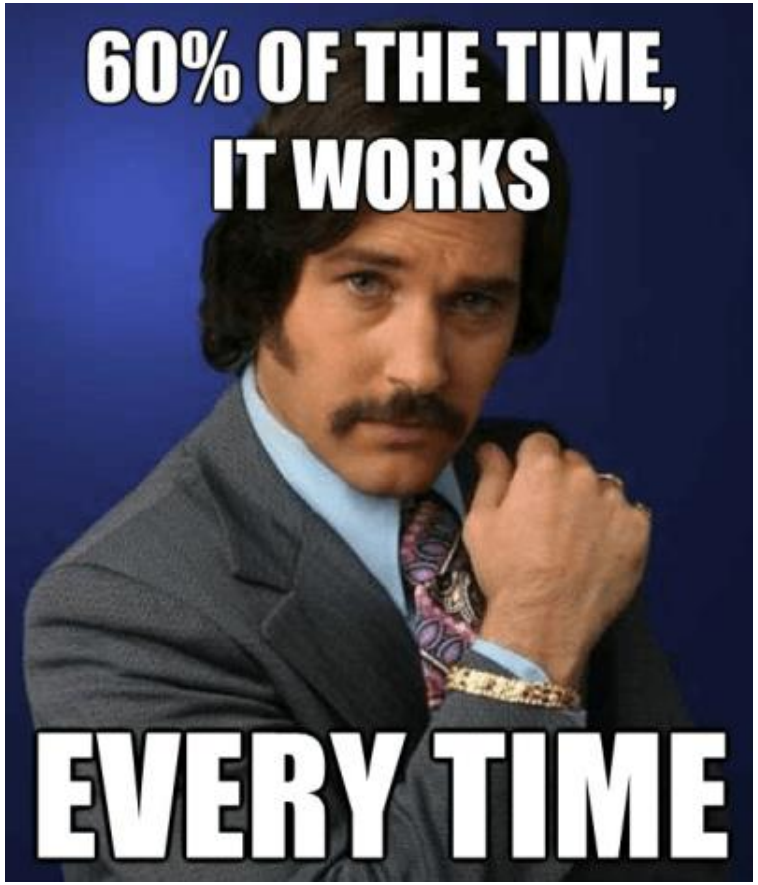
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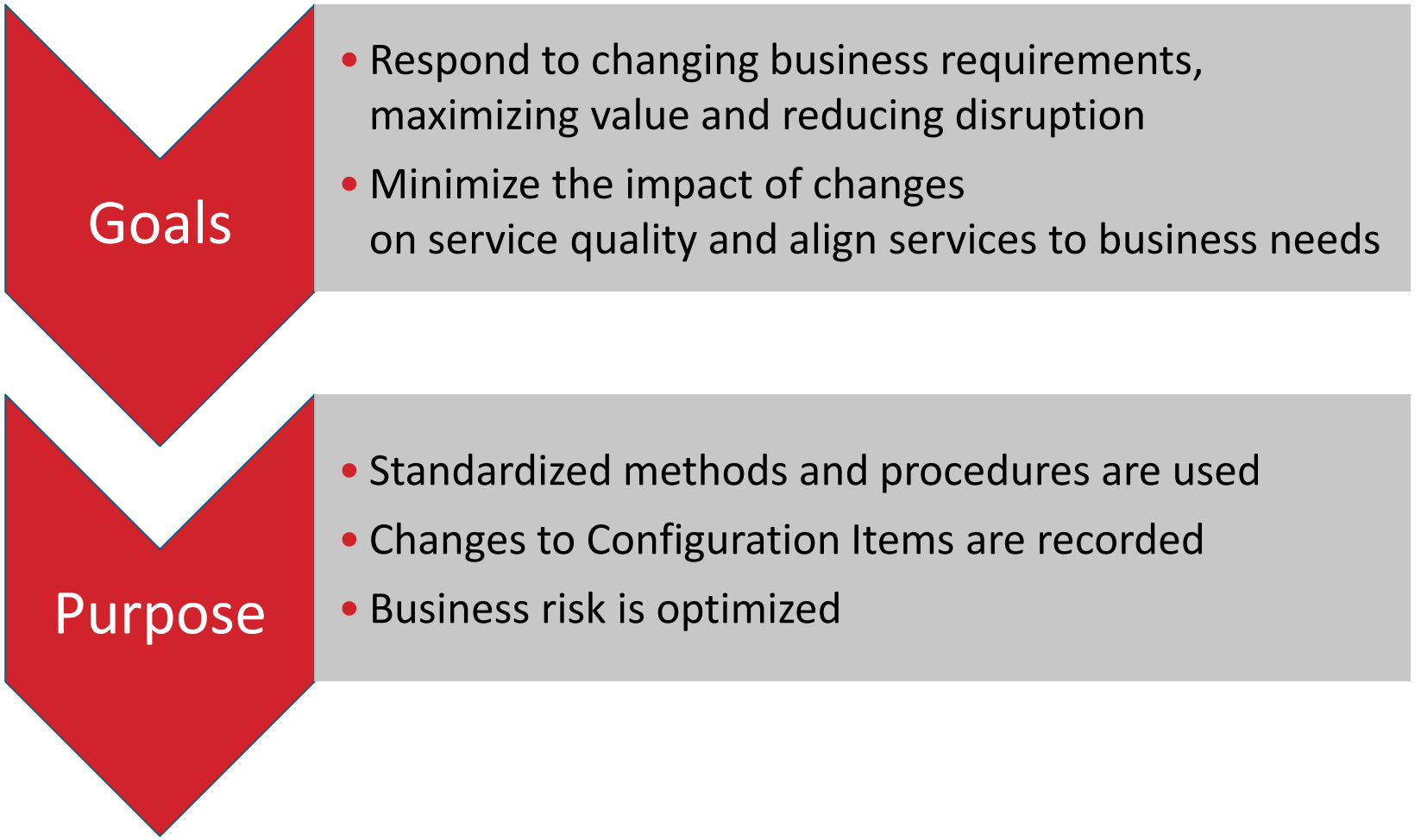
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Hard Research on Change Management



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What ITIL Says About Change Management



Improving service for our customers

Controlling change effectively

Getting the right decision

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What is a Change?

Change is an activity that involves the addition, modification, or removal of anything that could have an effect on IT or business services. The scope includes all:

- ✓IT and Business Services
- ✓Configuration Items
- ✓Processes
- ✓Documentation



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Types of Changes

Emergency

- Unplanned changes necessary to restore a service. CAB authorization Only
- Should only be considered where it is impossible to schedule a Normal change

Normal

- Normal Changes cover the bulk of all Changes that require full assessment and authorization
- Not emergency or standard. Requires Approval and CAB authorization

Standard

- Pre-approved, low risk, Change that is relatively common & follows work instructions
- Typically follows an established and repeatable implementation process

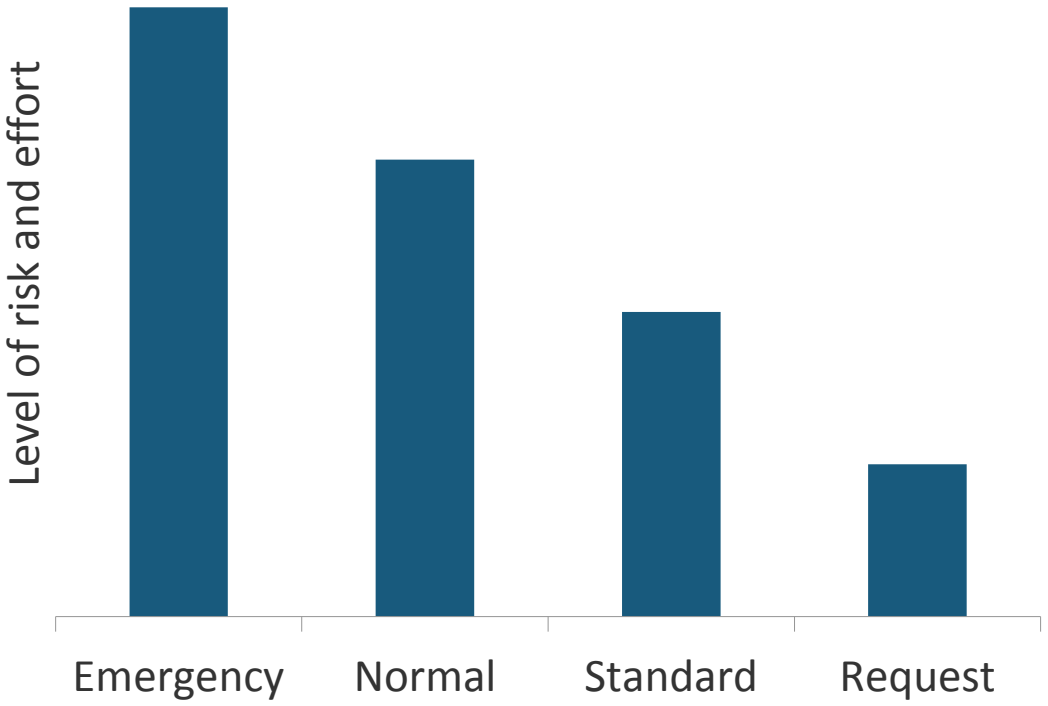
Service Request

- Very low risk, typically BAU
- Not a Change…

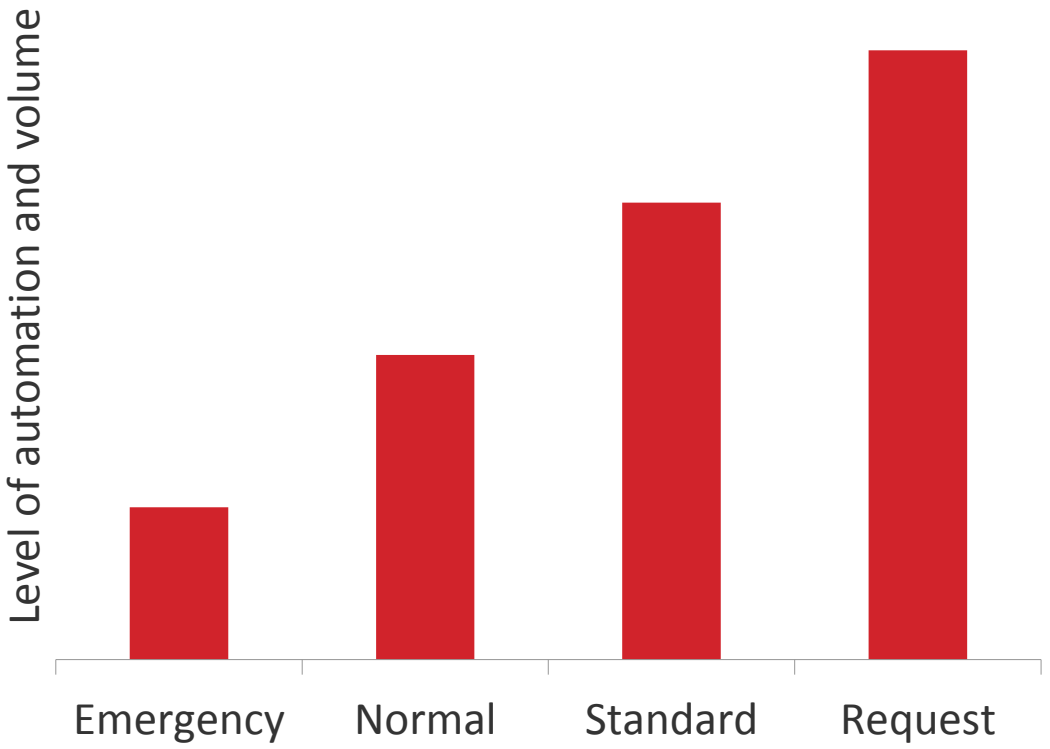
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Understanding Types of Change

Risk and Effort



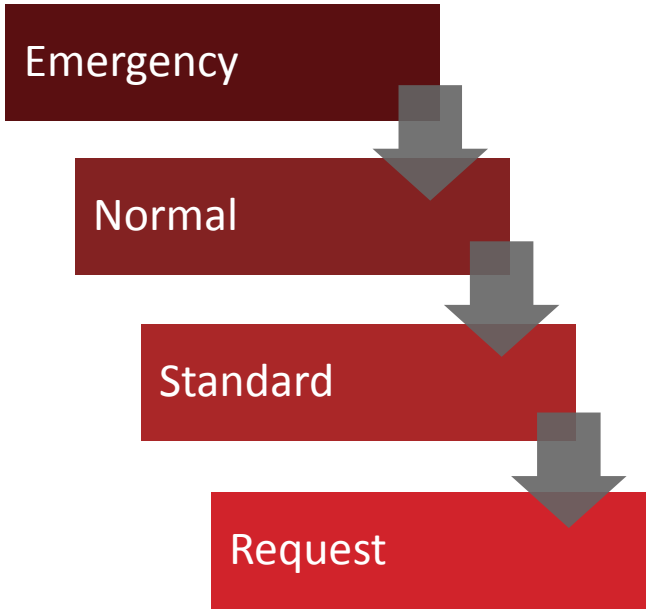
Automation and Volume



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Start to Automate

- Push changes down the chain
  - Increasing automation reduces risk by reducing human error
- Speed up a Standard Change, and make it more of a Service Request
  - Need a new server? Automate its deployment!
- Reduce risk by standardizing to match your business
- Feedback from Post Implementation Reviews into Continual Service Improvement

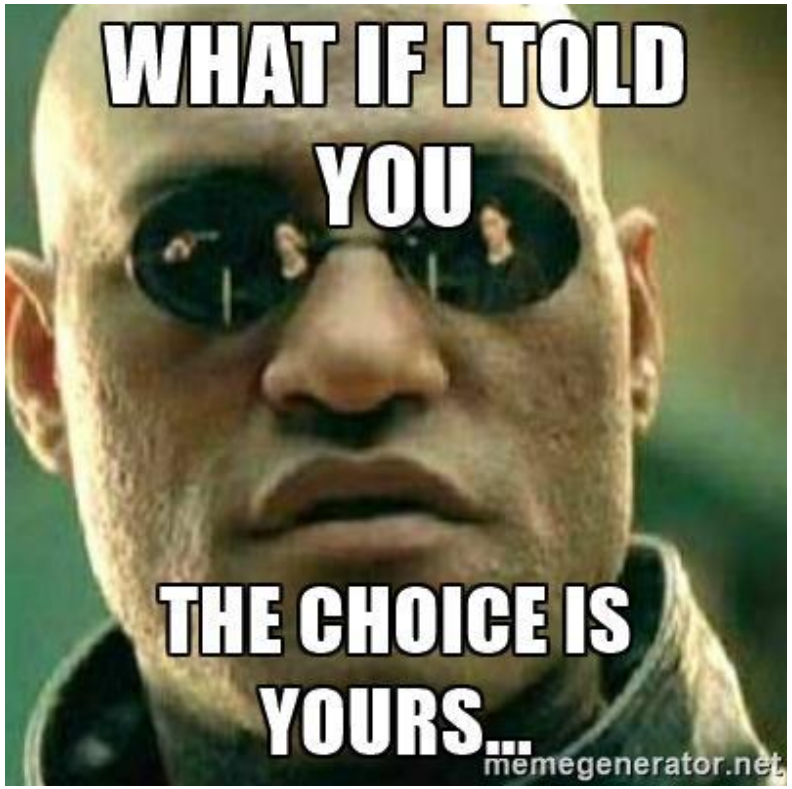


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How We're Going to Run the Show Today

Three options:

1. Watch first, then your turn
2. Click at the same time we do
3. Work your way through the lab



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Lab

Scenario: You want to login so you can join the lab today

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Make Change Easier Using Standard Changes

- Standard Changes are driven by Categories and Templates
- Standard Changes make it simple to:
  - Implement – As the change templates can and should use detailed descriptions for implementation (how to guide), what to test and a backup plan.
  - Consistent – Similar changes are done in a consistent way; knowledge is no longer in people's heads but is a list of steps that can be followed. Backup plans are standard so that they can be implemented should the worst happen.
  - Reporting – Ensuring data consistency makes reporting on successful/unsuccessful implementations easily visible, and allows the templates to be reviewed and updated to make them more effective.
  - End User Friendly – Standard change templates can be published to a self-service catalog enabling users to put in change requests or a simple process for a service desk personnel.

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Labs 1.1 – 1.2

Scenario: Check out the default configurations

- 1.1 Verify Default Configuration for a Normal Change
- 1.2 Verify Default Configuration for a Standard Change

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What Happened?

- There are three main change workflows in the baseline version of ServiceNow:
  - Emergency – CAB approval, 2 tasks
  - Normal – Approval and CAB authorization, 2 tasks
  - Standard – has 3 further change options (Network, Server, and Template) No Approval, 2 tasks



- Each Workflow is tied to the Type field

- Standard Change uses specific templates for change categories – for the next Labs, we will focus on Standard Changes

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Labs 1.3 – 1.5

Scenario: Create a new standard change template

- 1.3 Create a Standard Change Template

Scenario: You assess one of your templates and understand that it can be improved with an additional step

- 1.4 Review the Usability of the Template
- 1.5 Modify and Improve a Template

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What Happened?

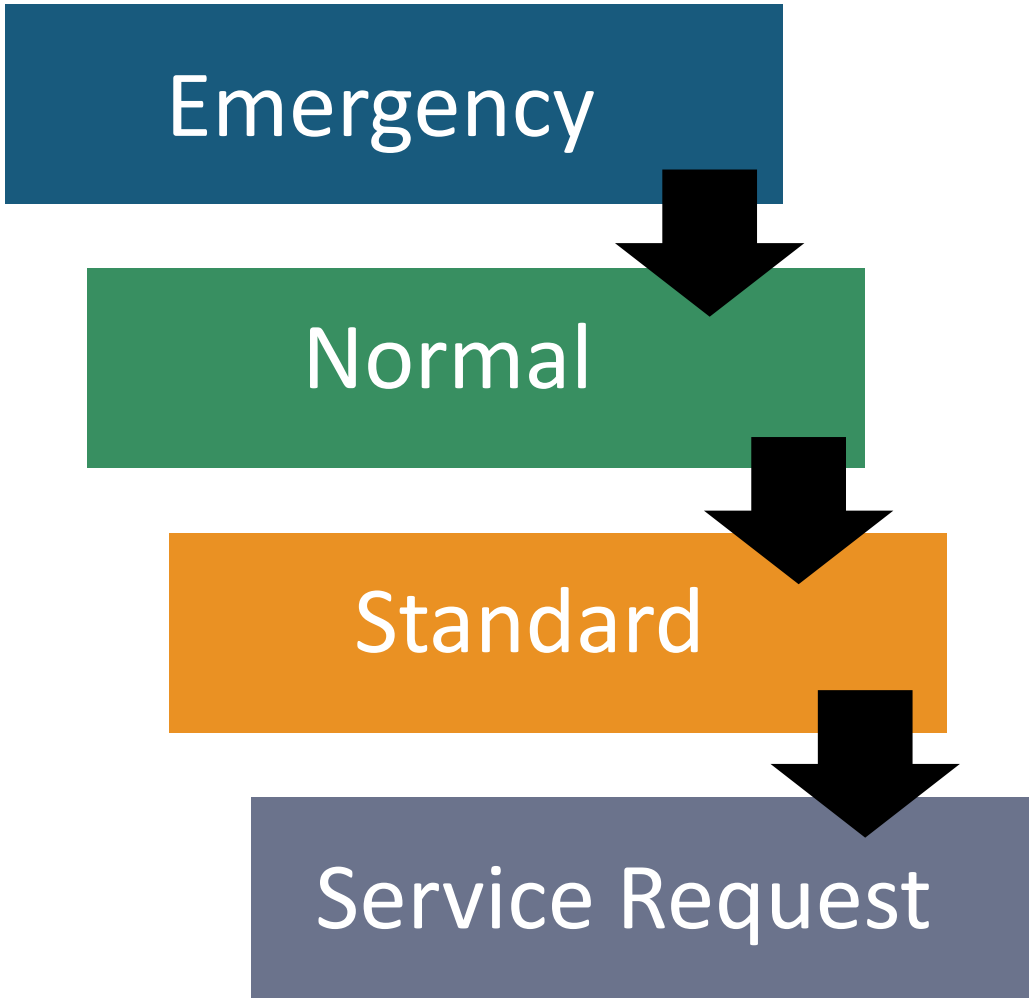
- Created a new Category for a Standard Change and a New Standard Change Template
- Simple form-filling lab, then this goes for approval by the Change Manager to publish the new Template
- Modified a template to make it better (Continual Improvement) and noticed that it became a new version with the stats reset
- Now, let's make access even easier for them…



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Service Catalog Strategy

- Identify appropriate changes
  - High volume
  - Well understood
  - Little deviation
  - Little or no discussion needed for authorization
  - Still needs to be on Forward Schedule of Change
- Multi-phase approach suggested
  - Make biggest impact first
  - Understand what works, and what doesn't
  - Use generic items
  - Build bespoke items later



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Lab 2.1

Scenario: We want to expose our new standard change template, “**Server OS Update to Windows 2013**” in the service catalog.

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What Happened?

- Make the change request visible via self-service
- Standard Changes make it simple for IT and end users as well as help monitor the effectiveness



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Change Schedule Conflict

- Does your change conflict with other scheduled events in your environment?
  - Detect whether planned changes conflict with other changes or have other scheduling issues.
  - Avoid planning changes around maintenance/blackout windows
  - Marks change requests that fall outside the allowed maintenance period
  - Minimise risk and disruption



- Blackout Schedules
  - Periods of time where changes cannot be implemented – for example, create a blackout schedule for code freezes at the end of the year
- Maintenance Schedules
  - Restrict changes to being implemented inside a specific period of time – for example, you can create a maintenance schedule implement changes only on the weekend

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Lab 3.1

Scenario: We need to create a blackout schedule to prevent web server changes taking place on the last business day of every month.

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What Happened?

- The Change Management Collision Detector provides the ability to detect whether planned changes conflict with other changes or have other scheduling issues
- When the Collision Detector is run, any issues which are detected are added to the new Conflicts related list with an explanation as to what issues were detected
- You can also create blackout schedules – times during which changes cannot be scheduled



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Risk Condition & Assessment

- Risk Assessment (subjective rating)
  - Flexible way to capture information from the end user, in order to drive the risk of the associated change
  - Libraries of questions can be used to drive the risk of a change, based on criteria contained within the change – for example, a different set of questions could be set for a hardware change versus a software change
  - The assessment uses a weighted score approach for each question
- Risk Conditions (objective risk calculation)
  - Automatically assign a Risk rating (e.g., Very High, High, Moderate, Low) to the change record based upon a wide variety of conditions including related Configuration items – for example, a Risk Condition can be used to control the changes applied to configuration items supporting a particular service and set the Risk to Very High
  - Risk Assessments and Conditions can be used individually, or together, if both methods are used together, the highest risk value from both methods is always selected

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Labs 3.2 – 3.5

Lab 3.2

- Scenario: We're going to create a 'Very High' risk condition if any changes are requested for payroll with less than one week's (7 days) notice

Lab 3.3

- Scenario: We're going to create an Application Change Risk Assessment survey

Lab 3.4

- Scenario: Assign our new risk assessment survey to any change requests made for business services

Lab 3.5

- Scenario: Creating a risk threshold that will calculate the risk based on the score of the survey

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What Happened?

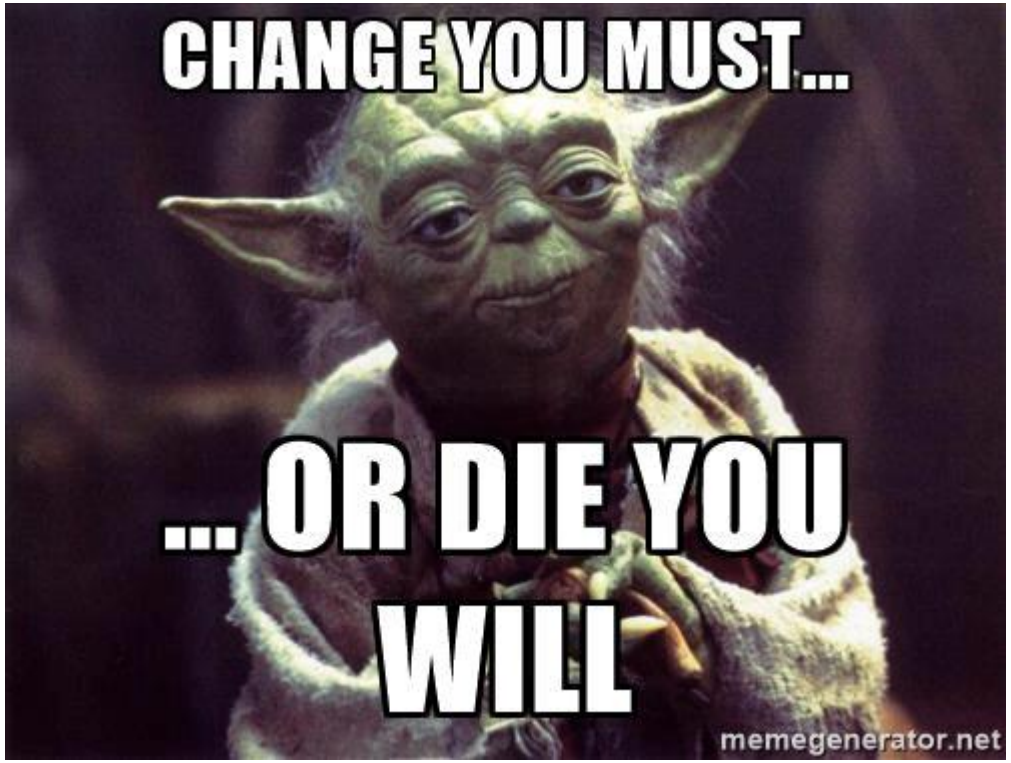
- We defined a risk condition to automatically assign a Risk rating to the change record based upon the attributes of the change
- We configured a new Risk Assessment survey to capture information from the end user, in order to drive the risk of the associated change. This included defining:
  - Assessment risk questions, condition, and threshold



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Agenda

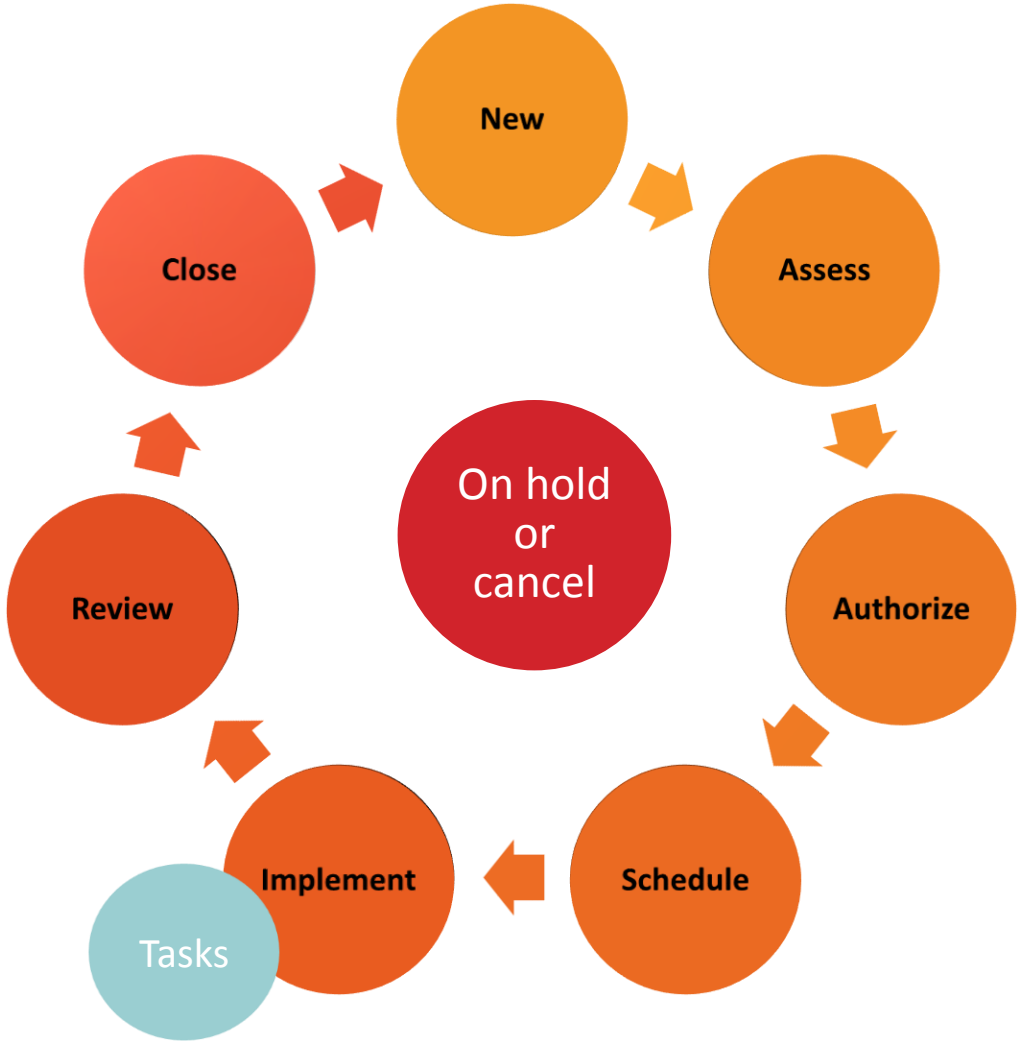
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Generic Change Model Workflows

- Automation is great
  - But build your Change model library based on CSI
  - Use the Post Implementation Review to understand what works
- Use the CMDB
  - Data driven workflows take information from the Change ticket
  - Use the support group of the CI to create tasks
- Empower your Change requesters
  - Start off with generic requests, then automate success



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Lab 4.1

Scenario: We're going to add a New Change Task, "check that change is fully documented," to the Standard Change Workflow

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What Happened?

- We needed to add a new task to ensure the change is implemented as per the defined process
- The Workflow is split into 2 for a Standard change, the basic change, and then the tasks related to that change type
- We modified the Workflow to add a new task
- By manipulating the workflow, the process can match your business processes



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Different State Transitions Based On Change Type

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Canceled
Normal	✓	✓	✓	✓	✓	✓	✓	✓
Standard	✓	✗	✗	✓	✓	✓	✓	✓
Emergency	✓	✗	✓	✓	✓	✓	✓	✓

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State Transitions Definitions

NEW	Change request has not been submitted yet for review and authorization. A change requester can save a change request as many times as necessary while building out the details of the change prior to submission.
ASSESS	Peer review and technical approval of the change details are performed during this state.
AUTHORIZE	Change Management and the CAB will schedule the change and provide final authorization to proceed.
SCHEDULED	The change is fully scheduled and authorized. It is now waiting for the planned start date.
IMPLEMENT	The planned start date has approached and the actual work to implement the change is being conducted.
REVIEW	The work has been completed. The change requester now determines whether the change was successful. A post-implementation review can be conducted during this state.
CLOSED	All review work is complete. The change is closed with no further action required.
CANCELED	A change can be canceled at any point if it is no longer required. However, a change cannot be canceled from a Closed state.

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Lab 4.2 – 4.4

Scenario: We're going to add a new state of 'Complete' before the Review in the state model

Lab 4.2

- We're enhancing the change process by allowing you to mark the change completion before going into post implementation review.

Lab 4.3

- Same scenario with more steps: We need to change the script that represents the state model for Normal Change to process the new 'Complete' state

Lab 4.4

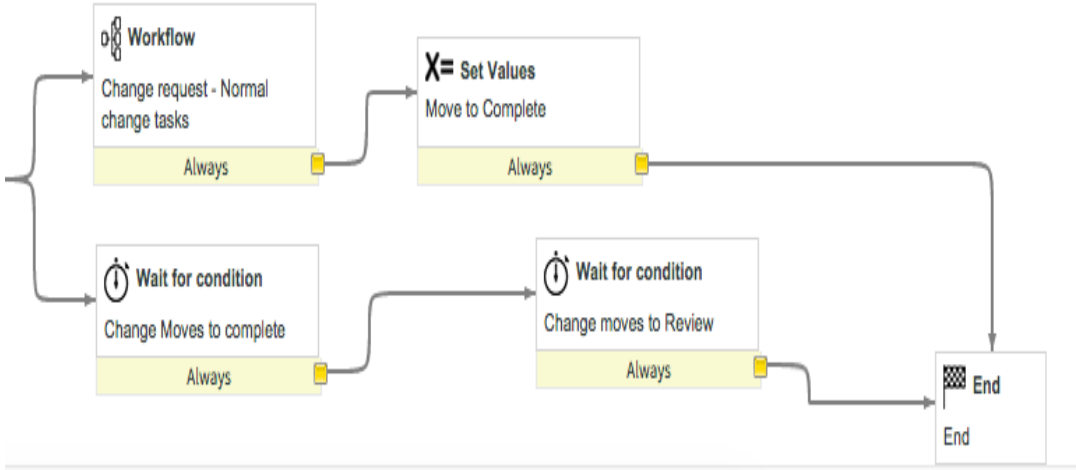
- Same scenario with more steps –We need to add a UI Action to activate the new state in the state model

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Process Flow Formatter and Workflow

- The process flow formatter provides a graphical summary of the stages in a process – the formatter is shown at the top of the change form (and others) showing which part of the process you are at
- Workflow drives the process (via automated and manual task and should align with the process flow (below)
- The two are closely linked from a usability perspective

- Remember:
  - Use workflow to drive your change process for whenever you add a new process in that flow





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Lab 4.5

Scenario: We're going to add a new state of 'Complete' before the Review in the state model

Same scenario with more steps – We need to add the new state to the graphical process flow

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What Happened?

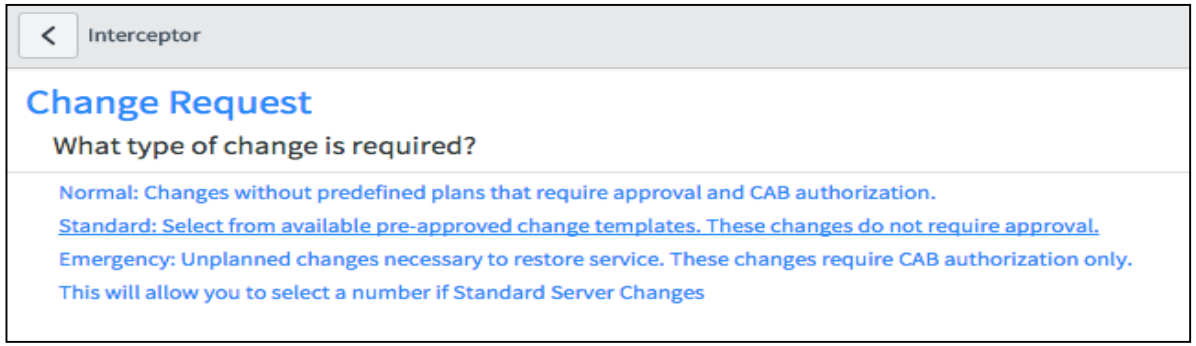
- We have added a new State to the Normal Change Process
- This meant a little scripting and a change to the workflow
- We also added a new UI Action and Process
- This means you can tailor the change process to match your business processes



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Edit Interceptor (Optional)

- It is a Handling Process that Intercepts the New Change request option and gives a series of options for the user
- Interceptors are defined in System Definitions / Interceptors and can be edited here or in the interceptor itself (edit option top-right)
- The Change Process Interceptor works by intercepting change_request.do
- We will add a new “question’ to this Change Interceptor



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Lab 4.6 (Optional)

Scenario: Add a ‘Server Change Requests’ as an option in the change interceptor

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What Happened?

- The interceptor lets you create new options on the main change selector screen which might be well used or important
- The interceptor allows us to run the new change request directly from the New Change screen
- Let’s make the main Change Requests easier for requesters or service desk operators to access



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What ITIL Says

Post Implementation Review

- Takes place after a change has been implemented
- Determines if the change or project was successful
- Opportunities for improvement
- May spot check, or be after every change

Purpose of review

- The change has had the desired effect
- With no side effects
  - Didn't breach SLA
- In budget
- In time
- To plan

Did it work?



How could we do better?

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Implementing Post Implementation Reviews

- A field on the Change Request form
  - Simple, though limited
- A Change Task created by the workflow
  - Assignable and traceable
- Attaching a document to the Change Request
  - Flexible, though lacks tracking
- Creating a survey
  - Create specific questions
  - Have multiple surveys
    - One for the customer
    - One for the implementer



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Lab 5.1

Scenario: We're going to create a survey called 'Change Post Implementation Review'

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What Happened?

- Use the drag and drop interface to build a survey
- Trigger conditions specify when the survey should run
- Reports and analysis can be done with the resulting data
- Consider asking for the Change Request number to tie the results together



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Recommended Labs

Mitigate Risk and Minimize the Impact of Change 101 – Lab 132006

- 1.30 – 3.30pm Wednesday

Managing a CAB Meeting – Lab 132004

- 9am – 11am Thursday

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Delivering Effective Change

- Ensure ServiceNow aligns to your Change Management objectives
  - Use appropriate Change types
  - Try to automate where possible
    - If risk allows
- Review how you do changes
  - For repetitive, high-volume changes, consider using Change Models
  - Automate the production of Changes
- Make it easy to submit changes
  - Use the Service Catalog to submit Standard Changes
  - Use the Service Catalog to get the right information into the Change Request
- Use Post Implementation Reviews effectively
  - Continuous Service Improvement is important
  - Use surveys to communicate with implementations and your requesters

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Top Takeaways

1

Automate with Change Models

2

Make it Easy with the Service Catalog

3

Find Out Success with Post Implementation Reviews

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Thank You

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Q & A

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