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WORK at LIGHTSPEED

Managing a CAB Meeting

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Agenda

- Introduction to the CAB Workbench
  - Why It's Needed
  - How It Addresses These Needs

Lab:

- Configure a Change Advisory Board
- Set CAB Schedule
- Conduct a CAB meeting
- Print/Save a Detailed Record of a CAB Meeting

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Speaker Introduction



Name: Joe Harris

Title: Advisory Solution Consultant

Function: Mapping Journeys and Illuminating The Art of The Possible

Company: ServiceNow

Experience: 20 years in technology, including over 16 years in Service Management

Expertise: ITIL, Process Improvement, Compliance and Audit-Proofing, IT Strategy, Analytics, Holistic Enterprise Service Management

Achievements: Completed over 75 ITSM implementations, managed support and service delivery organizations, transformed dozens of companies from poor/no process, to mature ITIL-based organizations.

Current Projects: Helping ServiceNow enterprise customers, understand and achieve the art of the possible.

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Speaker Introduction



Name: Alex Brayman

Title: Solution Consultant – Demo Center

Function: Demonstration Specialist

Company: ServiceNow

Experience: 10 years in technology and Service Management

Expertise: ITSM/ITOM/SecOps/Performance Analytics

Achievements: Completed ~400 ServiceNow demonstrations in 2016, to potential customers in North America. Advised over 50 existing customers with specific use cases referencing best practices.

Current Projects: Consolidation of disparate systems in multiple industries, CMDB Utilization, enhancement, and how it can modernize along with automate processes.

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Objectives and What You Will Learn

Objectives

- Learn how the ServiceNow CAB Workbench can change the way your company does Change Management.

What you will learn

- We will be walking through what it's like to run a CAB meeting in ServiceNow's CAB Workbench. In the past these meetings have often been disorganized, time consuming, and difficult to communicate or schedule, especially when multiple groups are involved. You will see how our CAB Workbench can provide structure and streamline the process behind these meetings.

Why it matters

- Today's lab will show you how using the CAB workbench can save time, provide a clear communication channel across all groups, prevent unplanned outages, and even prevent individuals from having to attend parts of a CAB meeting that are not relevant to them.

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Context – Setting the Stage

What is a CAB

- Change Advisory Board: A **change advisory board** (CAB) delivers support to a **change management** team by approving requested **changes** and assisting in the assessment and prioritization of **changes**.

To whom does this apply

- Change management is utilized across many lines of business, in practically every industry.
- Anyone needing to provide a structured approach and processes to approving, scheduling, and prioritizing changes to technology, documents, processes, etc.

Why the CAB Workbench is needed

- Change Advisory Board meetings are notoriously laborious, often disorganized and rarely something that people look forward to.
- Workforces are increasingly geographically spread out.
- There simply had to be a better way!

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Challenges

- Unplanned outages, due to poor change processes
- Wasted hours, as every person with a proposed change, sits through an entire CAB meeting
- Lack of organization during CAB meetings
- Lack of focus on the topic at hand, by remote attendees
- Poor or no record of the CAB meetings…
- Or substantial time wasted generating documentation, after a CAB meetings
- Conference bridges offer little insight into meeting attendance and participation

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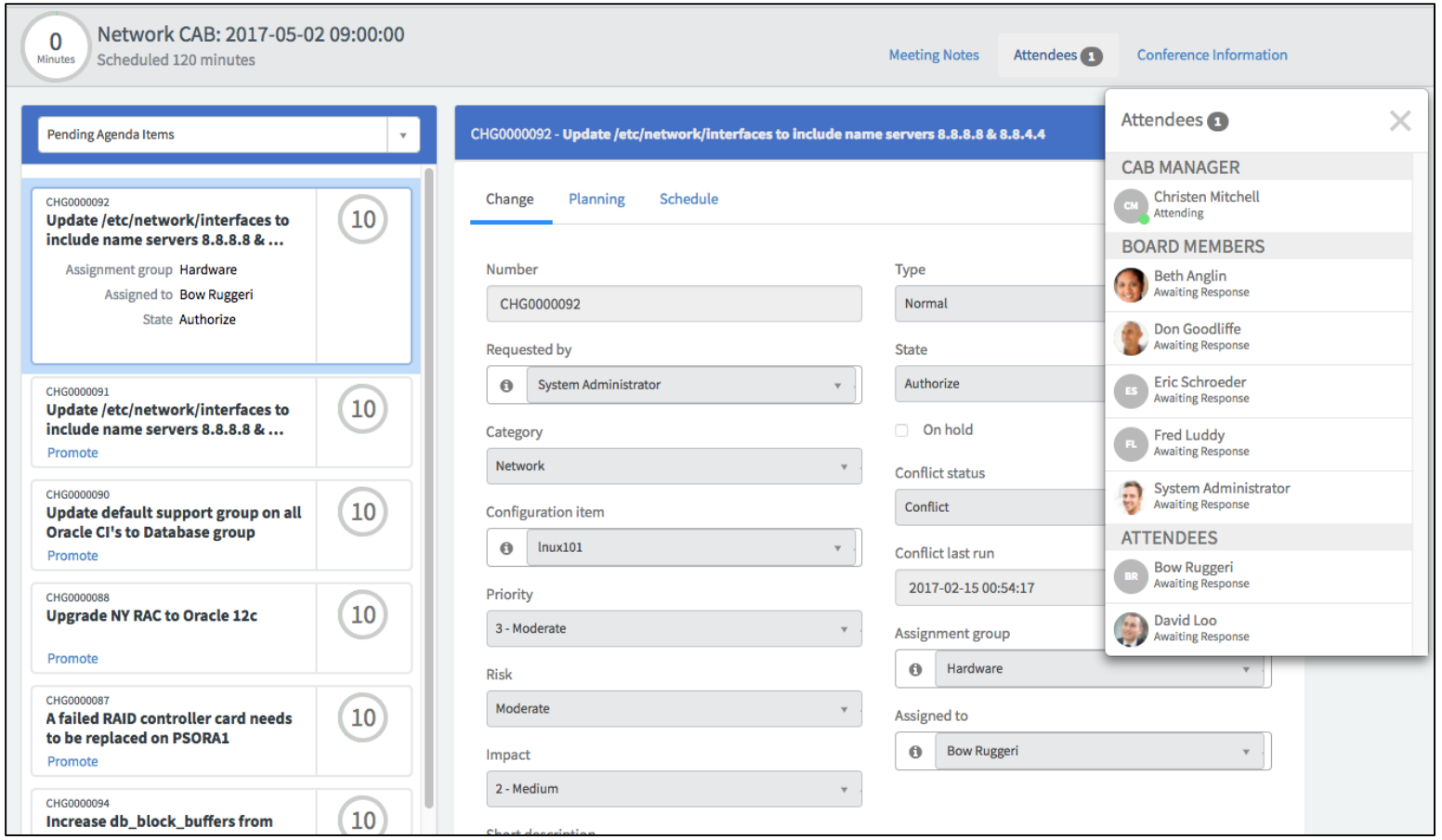
Goals

- Have fewer items slip through the cracks
- Waste less time and resources, per CAB meeting
- Ensure attendees are on the same page, as each agenda item is raised
- Easily monitor attendance/presence of all participants
- Automatically document entire CAB meetings, without any substantial effort

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Introducing the ServiceNow CAB Workbench

Bring order to your world of chaos!



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How CAB workbench addresses our challenges

- Unplanned outages, due to poor change processes
  - Improve collaboration and thoroughness during the review process
  - Ensure change owners are aware and attentive, when their item is up for discussion

- Wasted hours, as every person with a proposed change, sits through an entire CAB meeting
  - Attendees (change owners) are notified, when their agenda item is approaching, so they can join only during a portion of the meeting, relevant to them

- Lack of organization during CAB meetings
  - Agenda items are clearly displayed on the left side of the workbench and the current agenda item being reviewed, is displayed to all participants

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How CAB workbench addresses our challenges (continued)

- Lack of focus on the topic at hand, by remote attendees
  - The agenda item at hand, is always from and center, for all attendees.

- Poor or no record of the CAB meeting or substantial time wasted generating documentation, after a CAB meetings
  - A full record of the CAB meeting, all Change Requests on the agenda, all approval decisions and meeting notes, are exportable in a single PDF output.

- Conference bridges offer little insight into meeting attendance and participation
  - ServiceNow's presence feature, embedded within the CAB workbench, allows you to see who is currently in the meeting, who is scheduled to attend and keep a permanent record of when each person joins/leaves the meeting.

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How It Works

Let’s look at the components that make up the CAB Workbench feature

- CAB Definition
  - Defines major attributes of a Change Advisory Board
    - Name
    - CAB Manager
    - Delegates (authorized to fill in for the CAB Manager)
    - Board Members
    - Board Groups (all members of a Group can be dynamically assigned as Board Members)
    - Criteria of Changes to be included in the CAB’s meeting agenda
    - Audio bridge information
    - And more…

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How It Works (continued)

- CAB Schedule
  - Defines the recurring schedule on which a particular Change Advisory Board will meet
    - Start Date
    - End Date
    - Frequency: weekly, every 2 weeks, monthly, etc.
    - Repeat on: Day(s) of the week
- CAB Meetings
  - Each CAB Meeting record represents an Individual occurrence
  - Each meeting's agenda consists of items meeting the criteria in the CAB Definition, which are scheduled to be implemented prior to the next occurrence of the CAB meeting
- CAB Workbench
  - Presents a calendar view, from which you can launch scheduled CAB Meetings

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Solution Demo

Enough talking, let's have Alex show us!



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Lab Exercise

Let’s take it for a spin!

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Top Takeaways

1

CAB meetings have never been easier to organize and run!

2

With CAB Workbench, meetings are automatically documented.

3

Adopting the CAB Workbench is incredibly quick and easy.
There's no reason to delay. Start using it today!

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Thank You

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Q & A

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