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WORK at LIGHTSPEED

# Mitigate Risk and Minimize the Impact of Change 101

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servicenow

# Speaker Introduction



**Name:** Gareth Oliver

**Title:** Advisory Solution Consultant

**Company:** ServiceNow

**Based:** Brisbane, AUS

**Function:** Help solve customer business issues with ServiceNow

**Fun fact:** Scout leader, soccer player, learning to SCUBA dive, first half-marathon in November



**Name:** Johnson Chang

**Title:** Senior Solution Consultant

**Company:** ServiceNow

**Based:** Singapore

**Function:** Help solve customer business issues with ServiceNow

**Fun fact:**. 3½ years as Change Manager at IBM. Trained to operate heavy artillery.



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# Introduction

- This session will help you:
  - Understand how ServiceNow can power your decision making
  - See how **conflicting** changes can be quickly detected
  - View **upcoming** changes on a configurable timeline
  - Understand the **risk assessment** options
    - Qualitative – using information the instance already knows
    - Subjective – asking the requester relevant questions
  - Leverage the approval process including automating assignment of approvers
- Provide an opportunity to ask questions!

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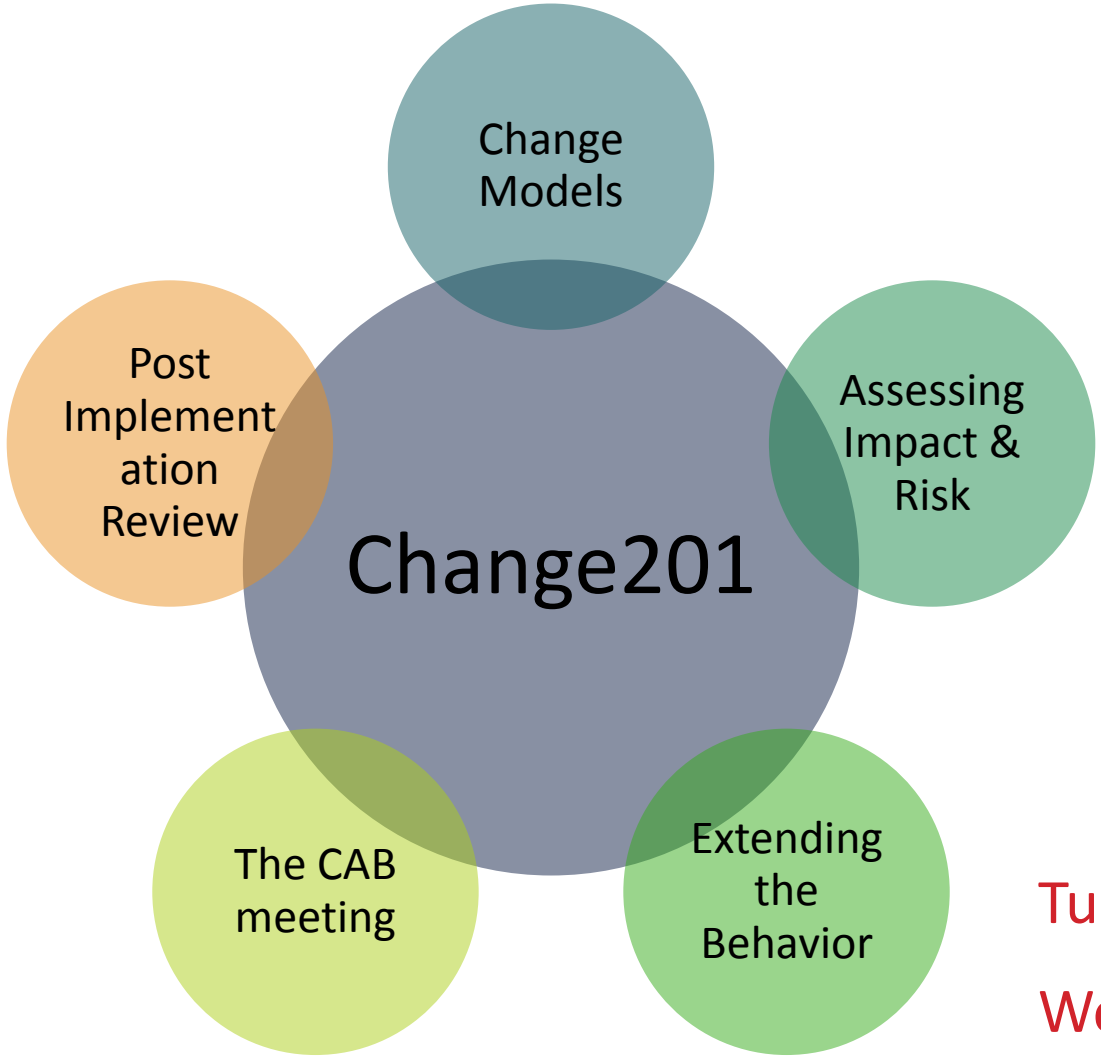

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# Agenda

- Change Management Overview and Objectives
- Conflict Detection and Lab
- Risk Assessments and Lab
- Change Approvals and Lab
- Wrap-up


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# What's next in 201? *Deliver Change Management Efficiency*







Tues 3:50pm-5:50pm W109B

Wed 3:50pm-5:50pm W109B



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# Change Management Overview and Objectives



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# What Is Change Management?

Change Management is:

*"The process responsible for controlling the life cycle of **all** changes. The primary objective of change management is to enable beneficial changes to be made, with **minimum disruption** to IT services."*

ITIL V3



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# What ITIL Says

## Goals

- Respond to changing business requirements, maximizing value and reducing disruption
- Align services to business needs

## Purpose

- Standardized methods and procedures are used
- Changes to Configuration Items are recorded
- Business risk is optimized

Dealing with decisions effectively


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# Why Is Change Management Important?





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# Interview with JJJ Co.

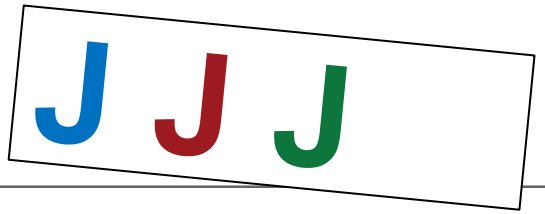






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# Almighty Change Management Tool : EXCEL!




## PROJECT CHANGE REQUEST FORM

CRF #: | MS Project #: | Date:

Project Name:

Project Manager:

Sponsor:

**Change Details**

Change Requested By:

Email Address:

Contact Number:

Location:

Reason For Change:

**Change Impact Analysis**

Action

Number of people responsible for carrying out change/ impact analysis:

How will this Change affect the following?

Execution Date: | Cost: | Schedule: | Scope:

**Authorisation**

Expenditure Approved

Sponsor Sign Off: | Approved PM Sign Off:

**Change Close-Out**

Follow up Comments:

Has appropriate and effective action been implemented?

SponsorName:

Project Manager Name:



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# Trying to answer audit questions





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# How Do You Make a Decision?

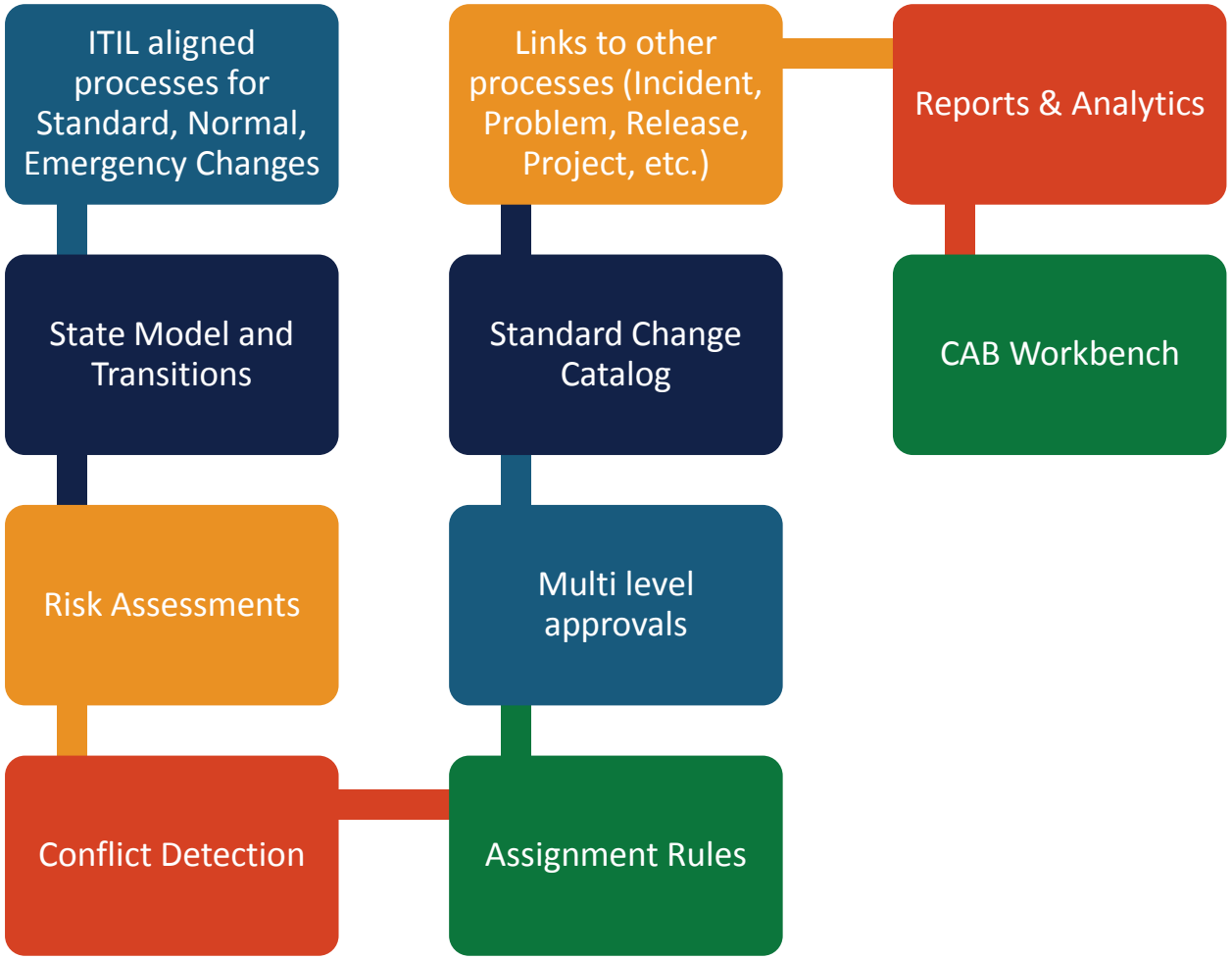
- What you are changing and why?
  - Record it against one or more CIs
- Who should we talk to?
  - Construct a relevant Change Advisory Board
  - Ensure other processes are aware of the activity – e.g., Incident, Problem, Release
  - Use the CMDB to help
- Is it likely to go wrong?
  - Conflicts are detected
  - Risks are identified
  - Approval is granted






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# ServiceNow offers the following for Change Management






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# Conflict Detection

Avoid issues by leveraging the CMDB and other checks

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# Conflicts Are Bad

- John in the data center team is upgrading the RAM in a server, taking it offline
- At the same time, Bob in the software team wants to perform an upgrade to SAP

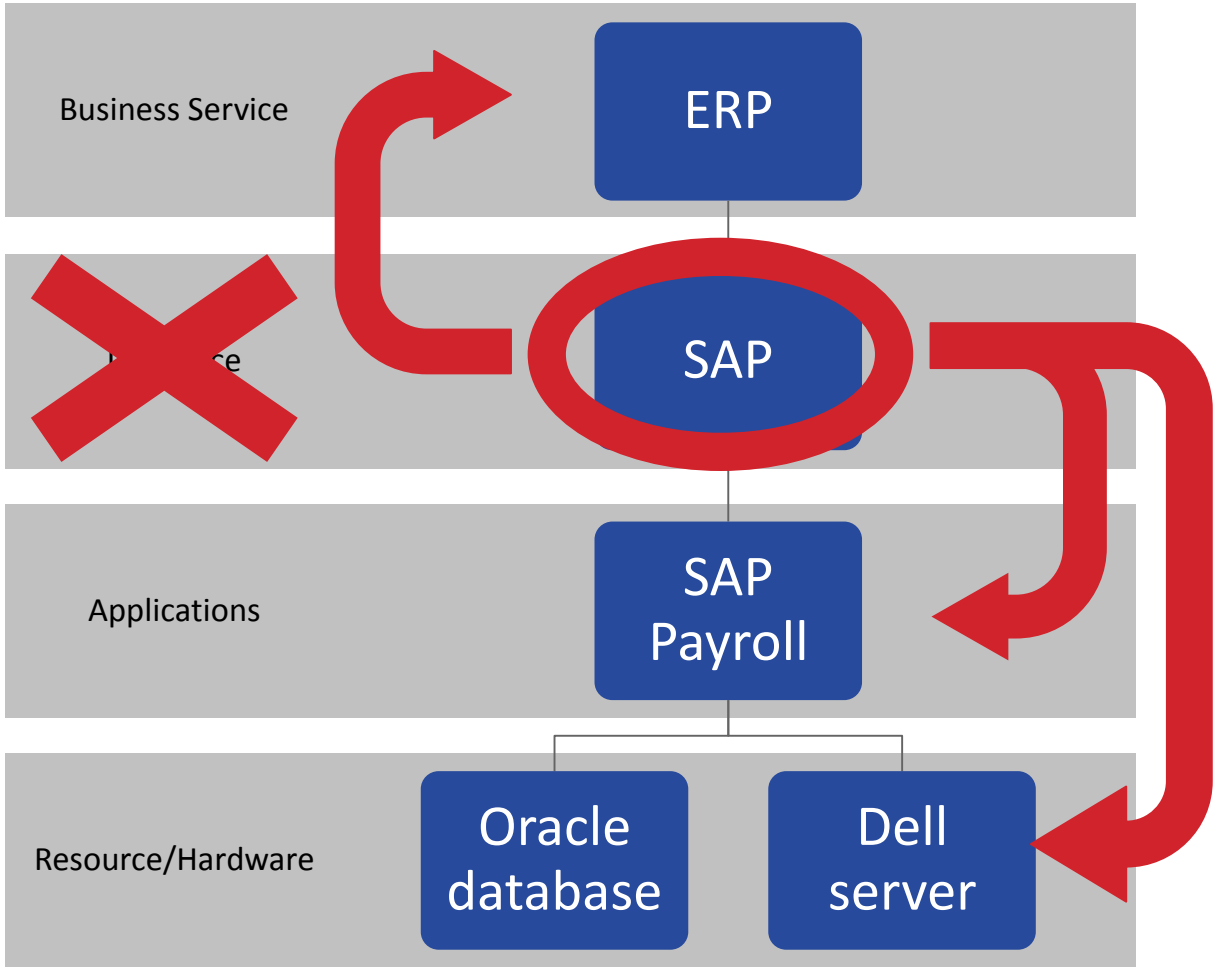




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# Conflict Detection

- Checks the Configuration Item
  - Make sure something is not already scheduled for the same CI
  - Can also check the parent CIs
  - Can also check the children CIs
  - Can assess what business services are impacted
- Checks the maintenance window
  - When to change
- Checks the blackout window
  - When not to change!





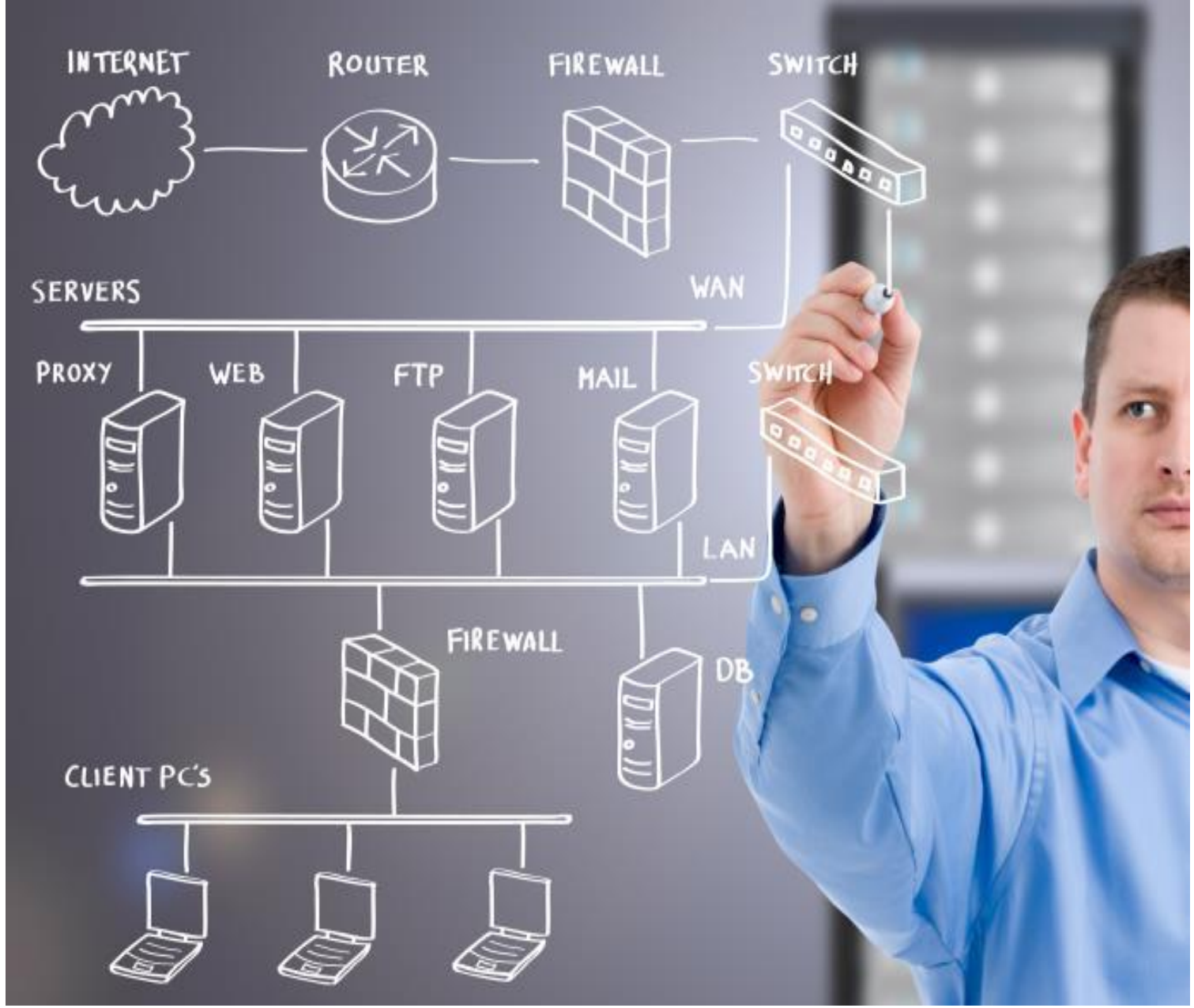
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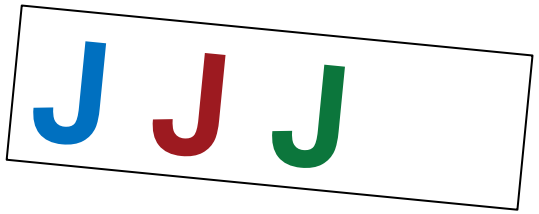
# Back to the interview with JJJ Co.





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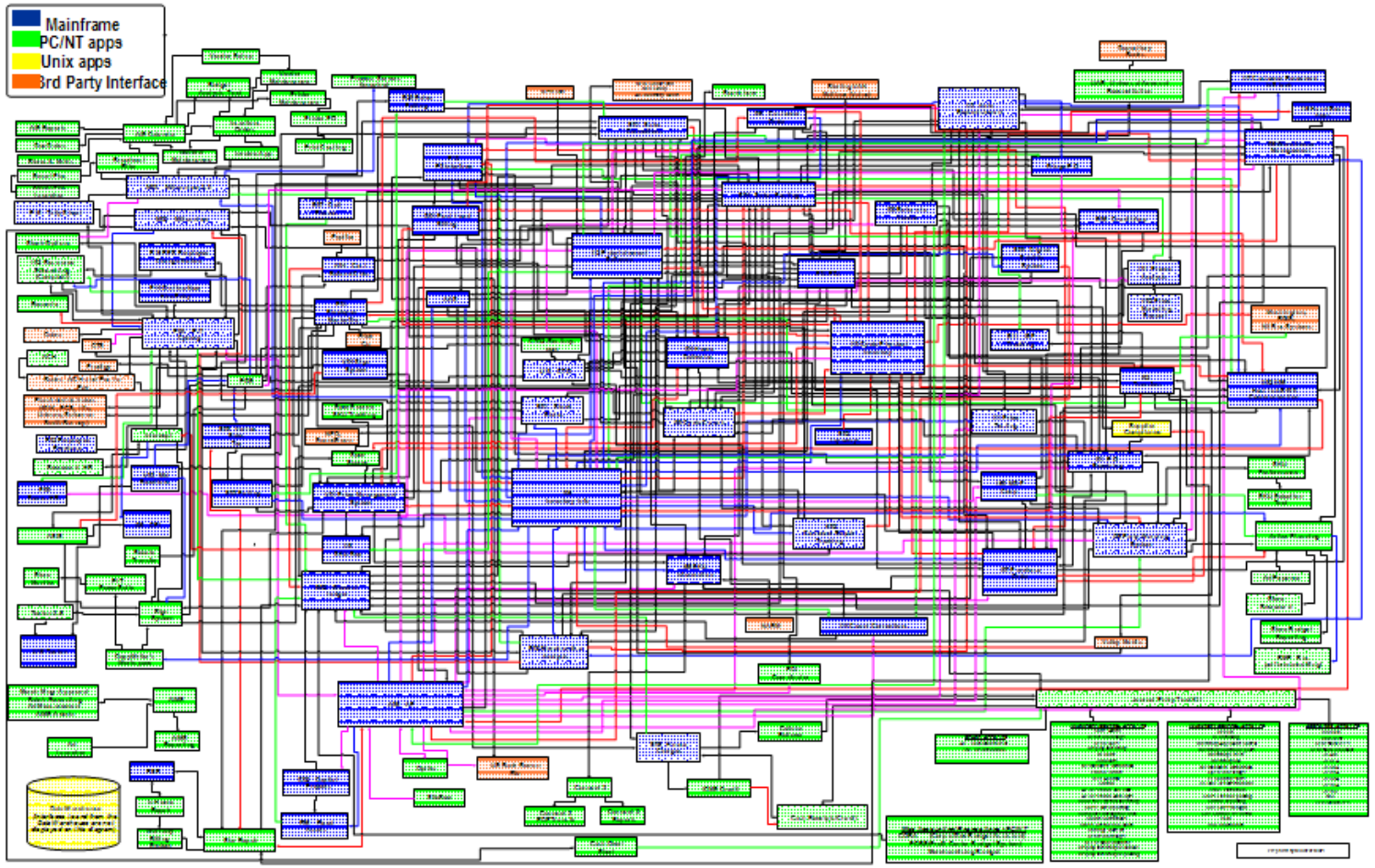



The original plan…



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J J J

… now looks like this.

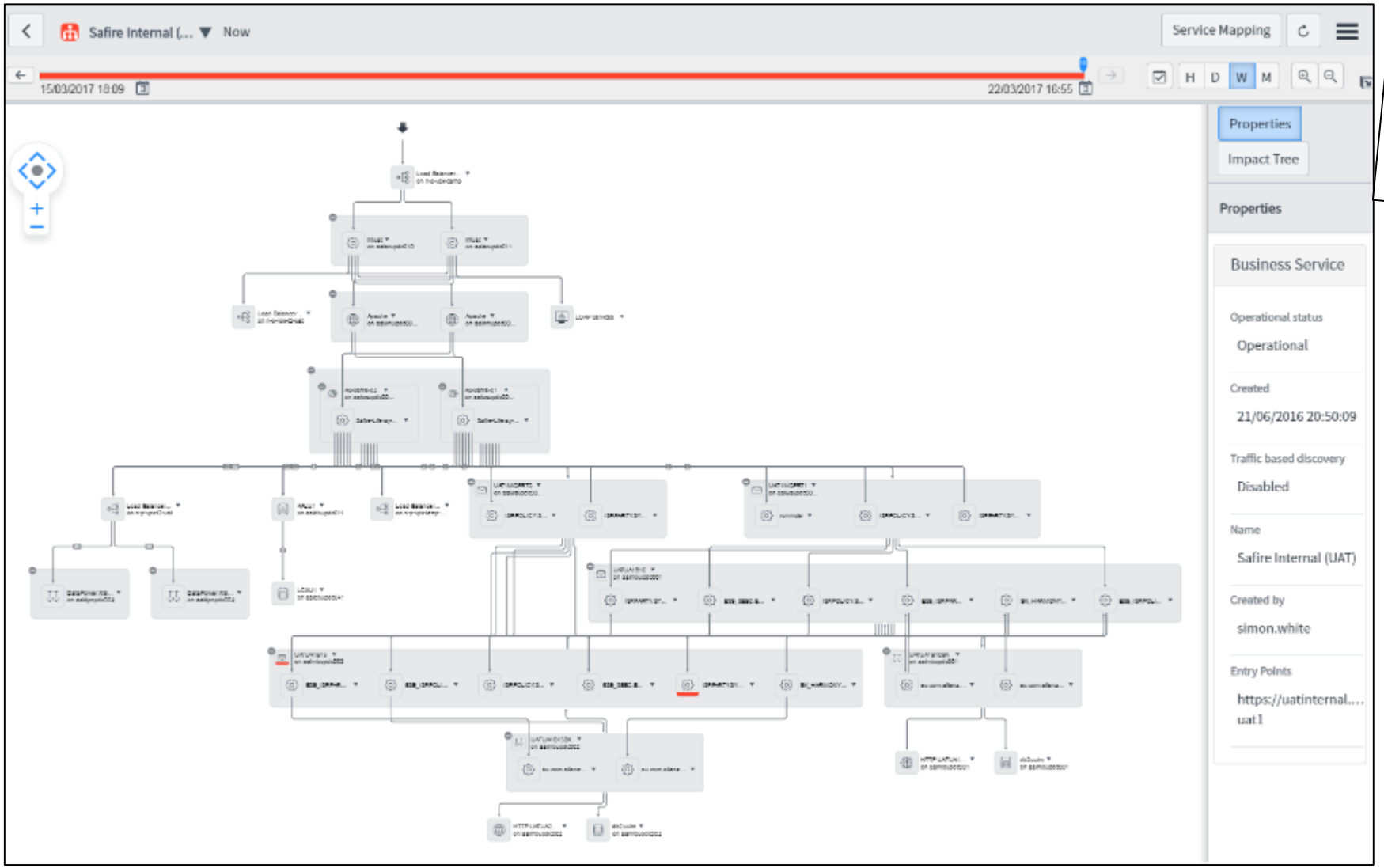
At least it did yesterday.

This has been and continues to be.



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# A Real Example – Insurance Company Customer-Facing Service



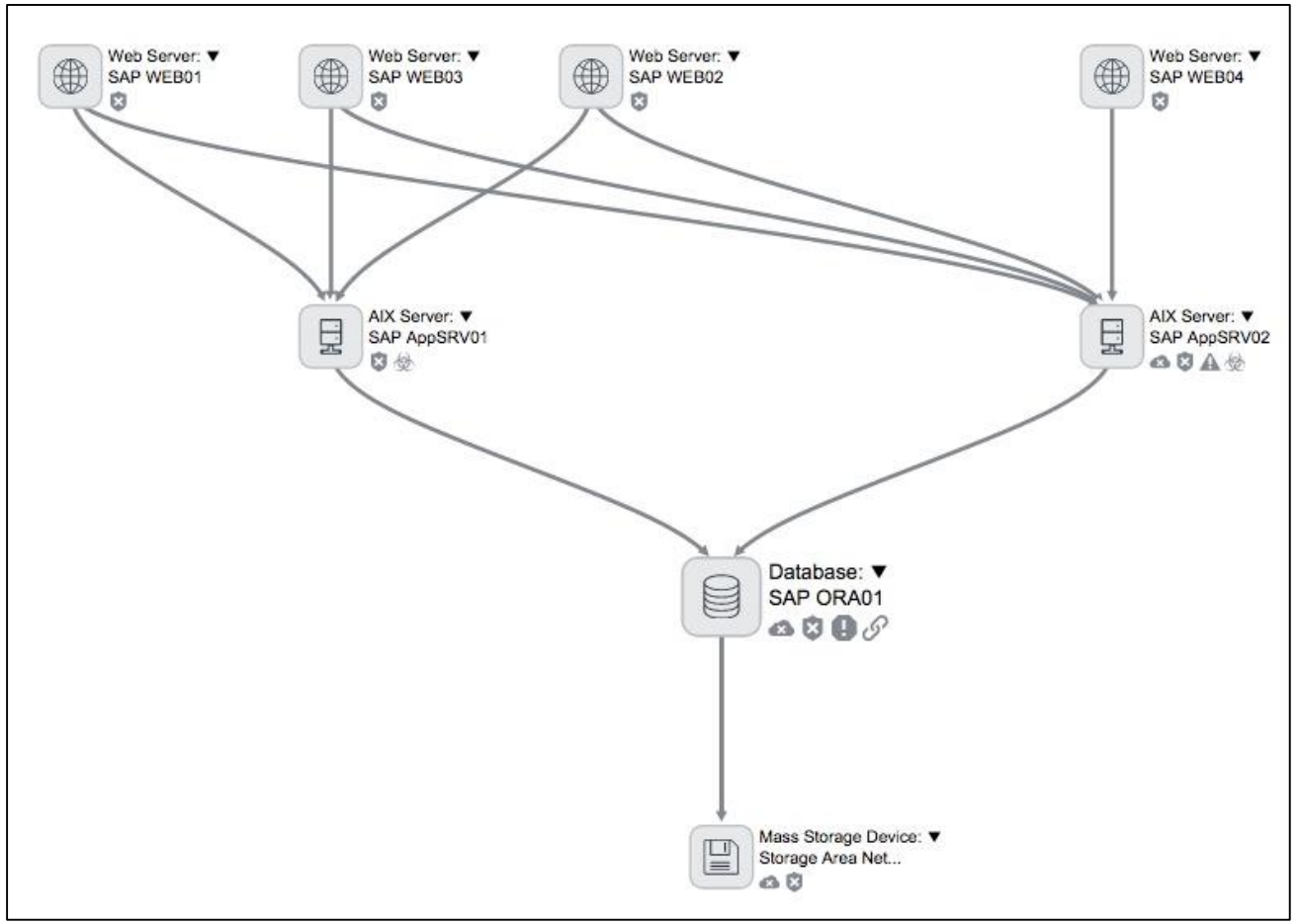

J J J



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# Conflict Detection Example

- A new change is scheduled and the CI is **`SAP ORA01`**
- Scheduled for Saturday between 5am and 10am






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# Conflict Detection Example (cont'd …)

- Check Conflicts reveals the following immediate conflicts

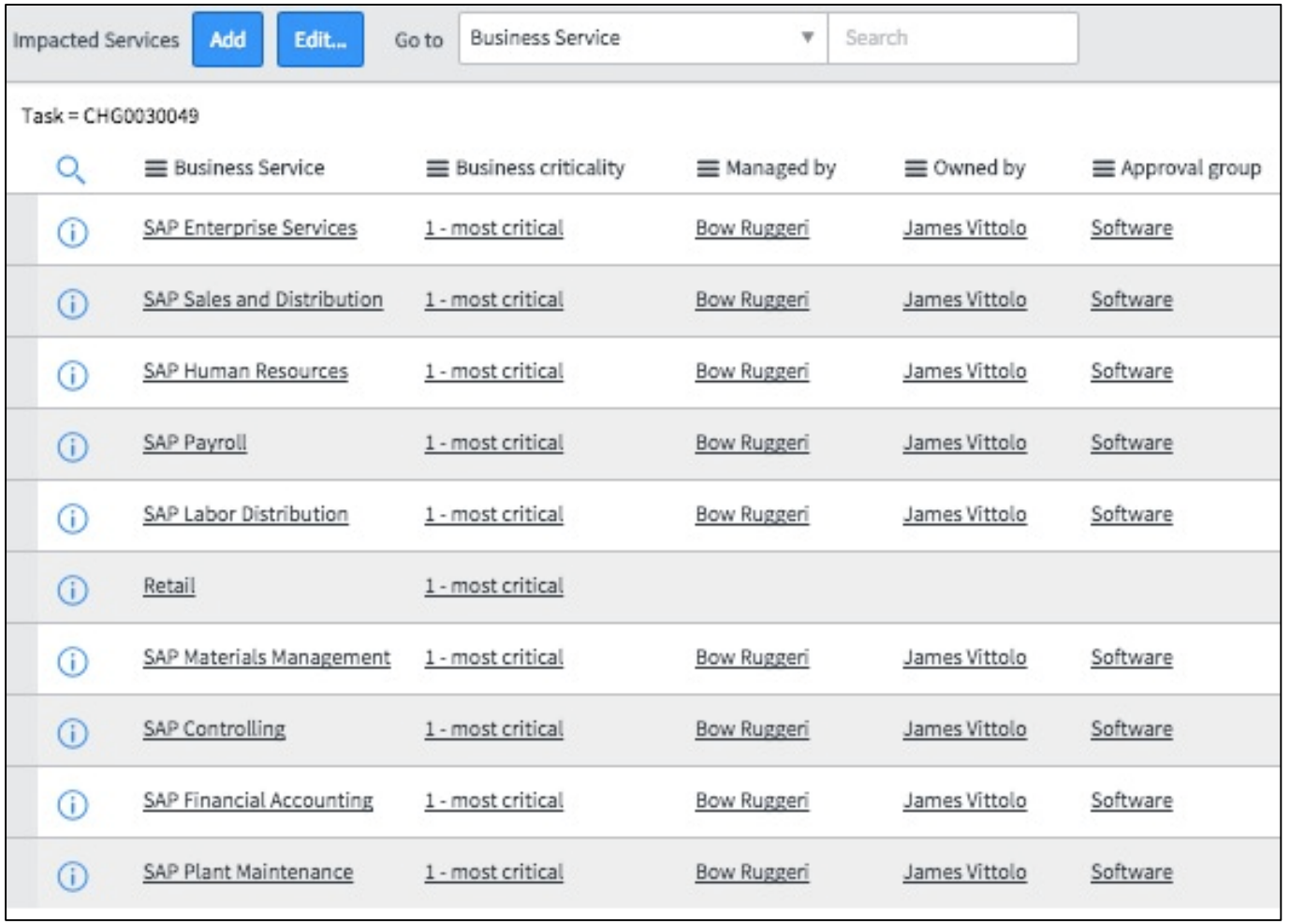
Conflicts Detected

| | | Change | Affected CI | Type | Schedule |
|---|---|---|---|---|---|
| ✕ | ⓘ | CHG0030049 | SAP ORA01 | Parent Not In Maintenance Window | Global Infrastructure |
| ✕ | ⓘ | CHG0030049 | SAP ORA01 | Child Not In Maintenance Window | Global Infrastructure |
| ✕ | ⓘ | CHG0030049 | SAP ORA01 | Parent Not In Maintenance Window | Global Infrastructure |
| ✕ | ⓘ | CHG0030049 | SAP ORA01 | Not In Maintenance Window | Global Infrastructure |


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# Conflict Detection Example (cont'd …)

- Refresh the impacted services to see what business services might be impacted by the change

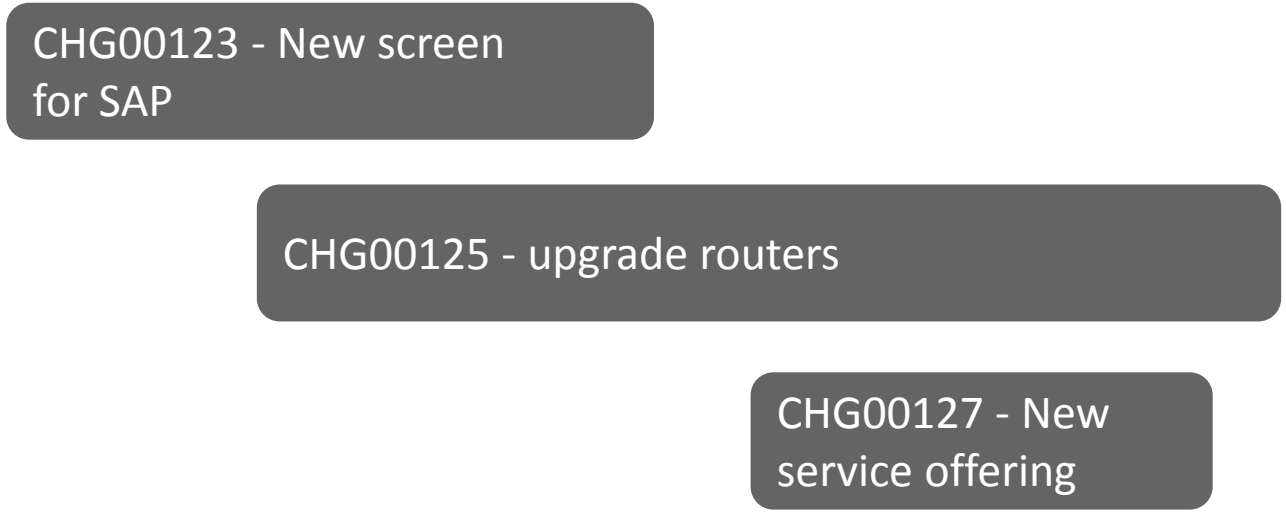





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# Forward Schedule of Change

- What is changing?
  - By Business Service
  - By Configuration Item
- When is it changing?
  - See a list of Changes
  - On a calendar
  - Using a timeline





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# Lab 1.0 – Conflict Detection and Service Identification



## Goal – *why are we doing this lab?*

- Ensure Changes do not impact other CIs or services
- Monitor the amount of change for a service

## Method – *how are we doing this lab?*

- Create a Change Request
- Use Conflict Detection:
  - Against the CI
  - Against the child and parent CIs and other services
- Create a Forward Schedule of Change report
  - Show your services
  - View the upcoming changes

## Steps

- Listed in Lab 1.0 of Lab Guide



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# Lab 1.0 – Lab Guide Addendum




- Pg 8 Step 5
  - After you press ‘Check Conflict’, close the dialog window and continue.
- Pg 10 Step 3
  - After you press ‘Check Conflict’, close the dialog window and continue.
- Pg 13 Step 5
  - After you press ‘Check Conflict’, close the dialog window and continue.


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# Risk Assessments

Capture information from the end user to make informed decisions

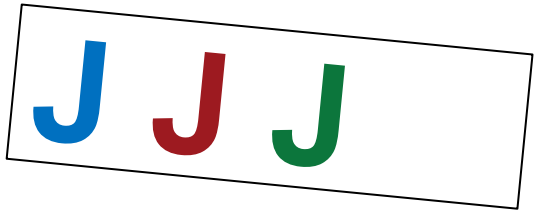
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# Back to JJJ Co…









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# Managing Risk

- Items to evaluate
  - Understand the effect on the service itself
    - SLAs, performance, reliability, security, etc.
    - And the effect on other related services
  - Will it affect non-IT infrastructure?
  - What will happen if we don't do the change?
  - What resources are required?
    - Costs, people, time
  - Impact on the 'plans'
    - Continuity, capacity, security, testing, etc.
- Distill into a single value
  - Very High, High, Moderate, Low
    - All changes are a risk!
- Understand business risk
  - 30% chance of failure is 70% chance of success!





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# Risk Conditions

- Risk calculator / condition
  - Rules based, generating risk and impact
    - Late submission: high risk
    - Critical business service: high impact

Planned Start Date is less than 3 days from now
Risk: very high

- Risk calculator / condition
  - On demand, or automatically
  - Useful for data based decision making
    - Qualitative assessment
    - Use information in ServiceNow


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# Risk Assessment

- Risk assessment
  - Questionnaire-based, generates risk only
    - How complex is the change?
    - How difficult is it to back out the change?

How complex is the change?
Very complex: 5 points
More than 3 steps: 3 points
Simple set: 1 point

Total points more than 5: Risk: moderate
Total points more than 10: Risk: very high

- Risk assessment
  - On demand only
    - Assessor required
  - Useful for when the CMDB is not complete
    - Subjective analysis
    - Use information provided by assessor


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# Lab 2.0 – Risk Conditions and Assessment



## Goal – *why are we doing this lab?*

- Flag CIs that are constantly being changed
- Better assess network changes

## Method – *how are we doing this lab?*

- Create a risk condition that is high risk if the CI has been updated in the last week
- Create an assessment for network equipment CIs
- Make risk field read only

## Steps

- Listed in Lab 2 of the Lab Guide



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# Change Approvals

Who approves and should we proceed?

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# Back to JJJ Co…





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# Getting the okay… Okay?

- ITIL recommends getting approval based on:
  - Anticipated business risk
  - Financial implications
  - Scope of the change
    - Internal effects only, within the finance service, specific outsourced services




**High risk, high cost**
- Business Executive Board

**Change impacts multiple services or departments**
- IT Management Board

**Change impacts local or service group**
- CAB or eCAB

**Standard change**
- Local authorization


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# Approvals in ServiceNow

| | |
|---|---|
| Generation | •Manual or workflow<br>•Data driven approvals use the CMDB, Business Service to find relevant approvals |
| Change Advisory Board | •Virtual CAB – voted on in the tool<br>•CAB Workbench |
| Organizational approvals | •Manager of Requested For<br>•Department Head<br>•Business Owner |
| Multi-level Approvals | •Peer review, Team Leader, then Business Owner, then CAB, etc. |
| Rules | •First response by anyone<br>•First response from every group<br>•All must approve<br>•Majority decision (first to 50%) |
| Responses | •Via email<br>•Via ServiceNow app<br>•Standard web browser<br>•Mobile phone browser |


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# Lab 3.0 – Risk-Based Approvals



## Goal – *why are we doing this lab?*

- Explore the change approval process
- Dynamically assign approvers based on CI settings

## Method – *how are we doing this lab?*

- Modify the workflow to seek approval from the Approval Group configured in the CMDB for each Affected CI specified on the Change Request

## Steps

- Listed in Lab 3 of the Lab Guide



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# Lab 3.0 – Lab Guide Addendum




- Pg 46 Step 19
  - Where to get the script:

(Box.com)

http://bit.ly/2pnDykY

(Remove the line numbers after you paste!)

(DropBox.com)

http://bit.ly/2qicoRq



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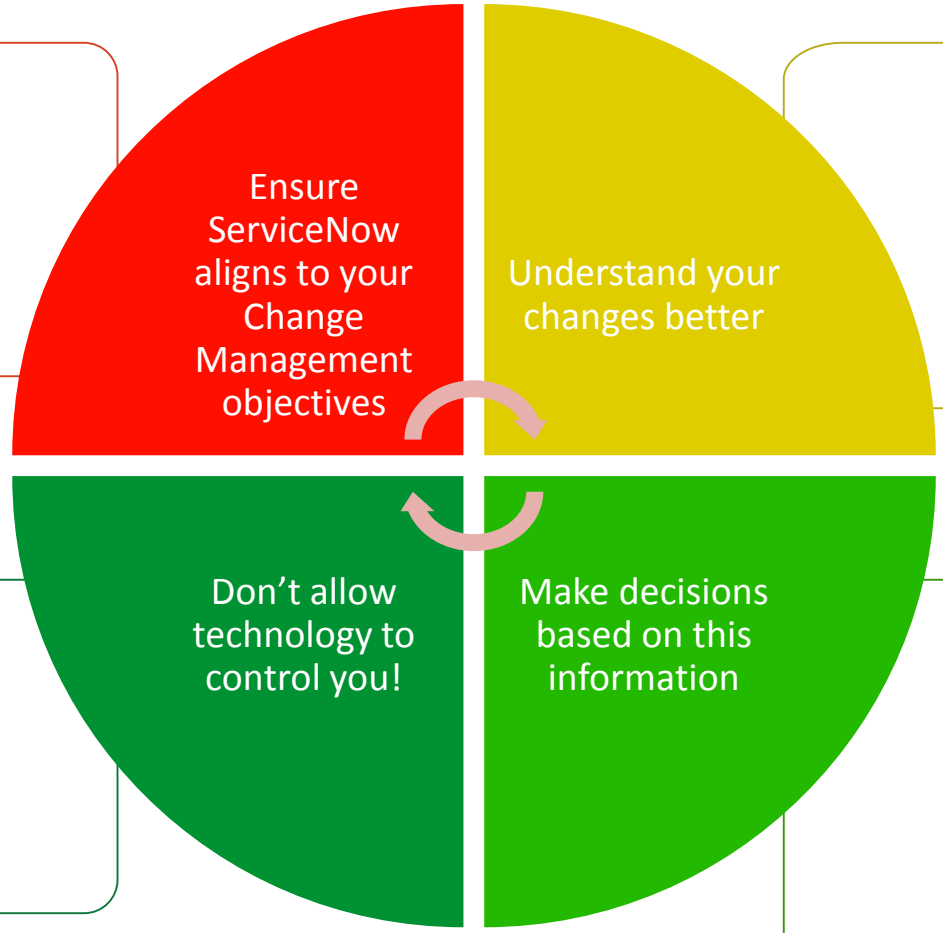
# Wrap-Up

*Final Thoughts, Q&A, and Additional Resources*

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# Mitigate Risk and Minimize the Impact of Change




- Automate where possible

- Ensure conflicting changes are detected automatically, and on a timeline
- Assess risk through qualitative and subjective methodologies
- Produce appropriate reports

- Have manual and automated options

- Request approvals appropriately
- Include other processes


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# More Resources

## Docs

- https://docs.servicenow.com/category/istanbul

## Community forum

- http://community.service-now.com

## KPI Library

- http://kpilibrary.com/categories/change-management

## Each other!

- What does the person sitting next to you do?



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# Top Takeaways

1

**Conflicts**

Detect automatically and leverage CMDB relationships.

2

**Risk**

Calculate with assessments or automate with conditions.

3

**Approvals**

Automate with dynamic assignments.



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# Final thank you to JJJ Co






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## Take the Survey

Please take a moment to complete a session survey in the Knowledge17 app.

# Thank You


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## Q & A

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