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April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Change 101: Managing Approvals, Conflicts and Risk

MARTIN WOOD
PRINCIPAL TECHNICAL CONSULTANT
ServiceNow

LYNDA REES
SENIOR SOLUTION CONSULTANT
ServiceNow

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Who are we?

- Martin Wood
  - Over 6 years working with ServiceNow
  - Almost 5 years working for ServiceNow
  - Favourite ServiceNow aspect:
    - Being able to automate anything
    - Freedom!



- Lynda Rees
  - 3 years working for ServiceNow
  - Favorite ServiceNow aspect:
    - Change Management!



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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
  - **Develop a scalable, data driven approval process**
- Provide an opportunity to ask questions!

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Lab Agenda

Change Management objectives

Conflict detection – and lab

Risk assessment – and lab

Getting approval – and lab

Other resources and Q&A

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Change Management objectives

What is the point of Change Management?

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What is Change Management?

Change Management is:

"The addition, modification or removal of anything that could have an effect on IT services"

ITIL 2011 glossary

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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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Change

How do you make a decision?

- What you are changing and why?
  - Record it against the CI
- Who should we talk to?
  - Construct a relevant Change Advisory Board
  - Ensure other processes are aware of the activity
  - Use the CMDB to help
- Is it likely to go wrong?
  - **Conflicts** are detected
  - **Risks** are identified
  - **Approval** is granted



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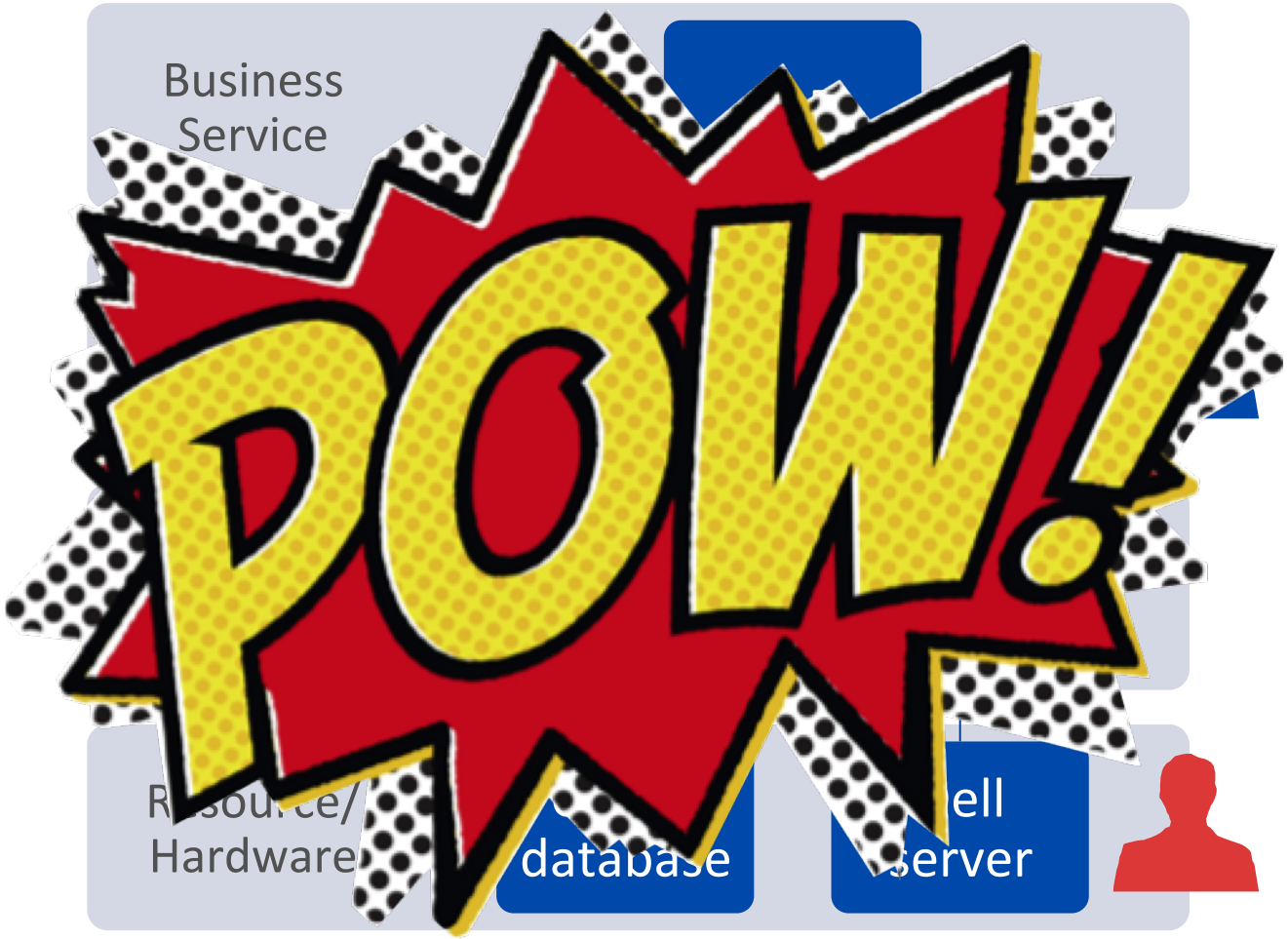
Detecting conflicts

Through automation and reporting

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Conflicts are bad

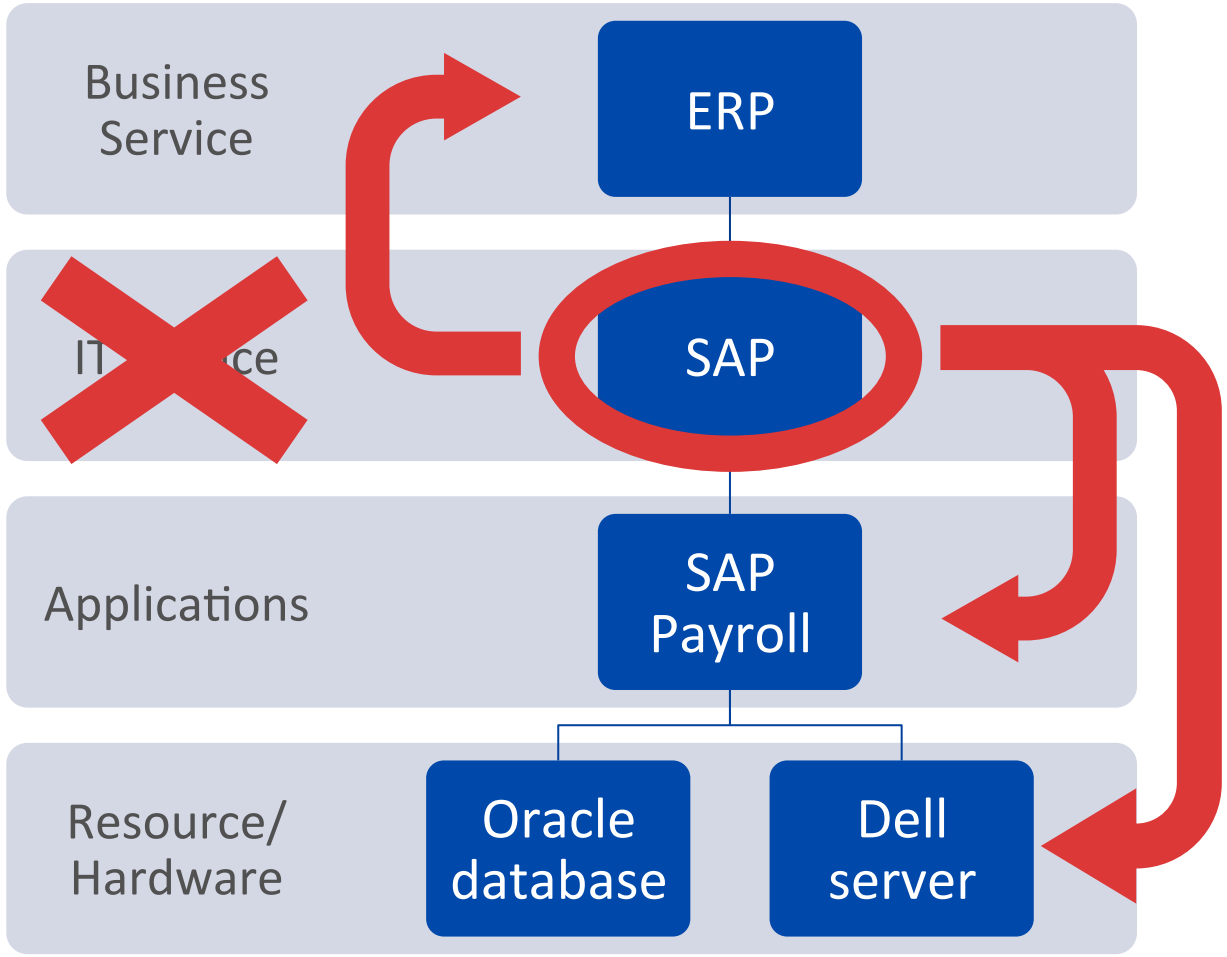
- John in the data center team is upgrading the RAM in a server, taking it offline
- At the same time, Bob in the software team wants to perform an upgrade to SAP



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Conflict detection

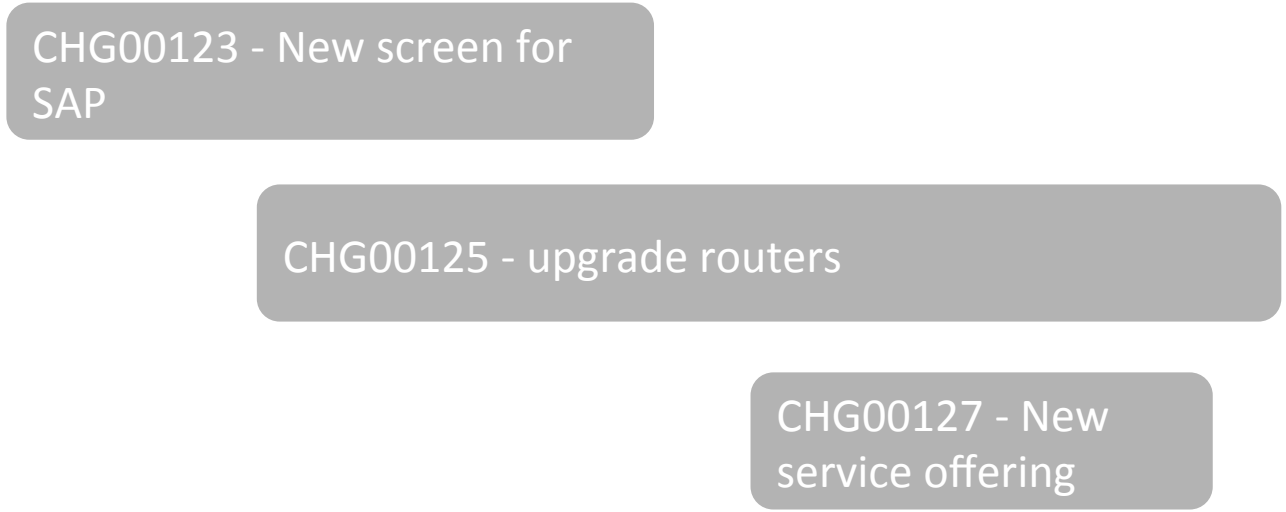
- Checks the Configuration Item
  - And the parent
  - And the children
- Checks the maintenance window
  - When to change
- Checks the blackout window
  - When not to change!



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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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Exercise 1 – Conflict detection

- Goal
  - Ensure Changes to the same service do not happen at the same time
  - Monitor the amount of change for a service
- Method
  - Create a blackout window
  - Create a Change Request
  - Use Conflict Detection:
    - Against the CI
    - Against the Service
  - Create a Forward Schedule of Change report
    - Show your services
    - View the upcoming changes
- Steps
  - Listed in exercise 1

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Risk assessment

Getting the information we need to decide

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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 calculation

- Risk calculator
  - 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 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

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Risk calculation

- Risk calculator
  - On demand, or automatically
  - Useful for data based decision making
    - Qualitative assessment
    - Use information in ServiceNow
- 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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Exercise 2 – Risk assessment

- Goal
  - Flag CIs that are constantly being changed
  - Better assess network changes
- Method
  - Create a risk condition that is high risk if the CI has been updated in the last 2 weeks.
  - Install the risk assessment plugin and create an assessment for networking CIs
  - Make risk field read only
- Steps
  - Listed in exercise 2

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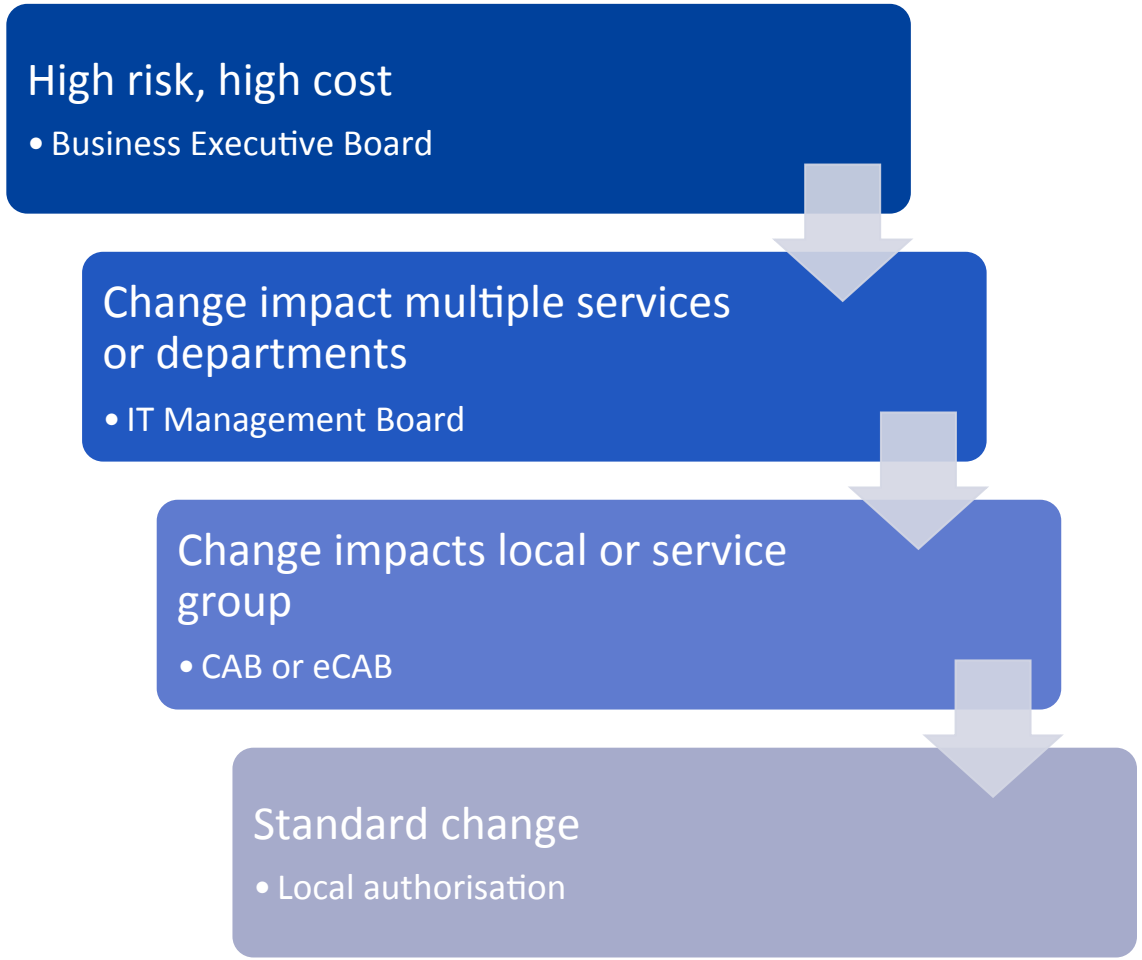
Getting approval

Should we proceed?

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Getting the 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



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Approvals

- Generation
  - Manual or workflow
  - Data driven approvals use the CMDB, Business Service to find relevant approvals
- Change Advisory Board
  - Virtual CAB – voted on in the tool
- Organisational approvals
  - Manager of Requested For
  - Department Head
- Rules
  - First response by anyone
  - First response from every group
  - All must approve
  - Majority decision (first to 50%)
- Responses
  - Via email
  - Standard web browser
  - Mobile phone browser

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Exercise 3 – Approval

- Goal
  - Efficient change approval
  - Assigning the tasks to the right teams
- Method
  - Modify the workflow to seek approval only if risk is high
    - If risk is high, approval done by the manager of the CI
    - If risk is very high, approval is performed by CAB of the Business Service
  - Modify the workflow tasks
    - Associate each task with a stage
    - Have each task assigned to the group responsible for the CI
- Steps
  - Listed in exercise 3

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Wrapping it up

Some final thoughts

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Managing approvals, conflict and risk

- Ensure ServiceNow aligns to your Change Management objectives
  - **Automate** where possible
- Understand your changes better
  - Ensure conflicting changes are **detected** automatically, and on a timeline
  - Assess risk through **qualitative** and **subjective** methodologies
  - Produce appropriate reports
- Make decisions based on this information
  - Request approvals **appropriately**
  - Include other processes
- Don’t allow technology to control you!
  - Have manual and automated options

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Final thoughts

1 Conflicts – detect automatically, and using reports

2 Risk – calculate with questions, or data

3 Approvals – ask the right person, often determined from the risk

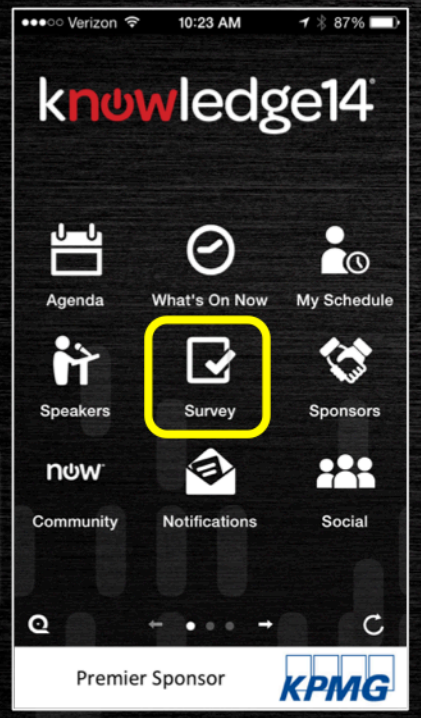
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More resources

- Wiki
  - http://wiki.service-now.com
- Community forum
  - http://community.service-now.com
- Each other!
  - What does the person sitting next to you do?

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Thank You

Martin Wood

Principal Technical Consultant

ServiceNow

martin.wood@servicenow.com

Lynda Rees

Senior Solution Consultant

ServiceNow

lynda.rees@servicenow.com

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