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# Change 201: Delivering Effective Changes

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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 change implementations**
  - Create workflows to automate repetitive actions
  - Allow End Users to submit standard changes
    - Provide new standard changes quickly and easily
  - Know what works – and what doesn't – with Post Implementation Reviews
  - **Develop a scalable, data driven implementation process**
- Provide an opportunity to ask questions!

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# Lab Agenda

Value of automating change

**Change models** – and lab

**Standard changes in the Service Catalog** – and lab

**Post Implementation Review** – and lab

Other resources and Q&A

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## Best practices

How can we implement change better?
And how can ServiceNow help?

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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

Improving service for our customers

Controlling change effectively

Getting the right decision

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# Rule of thumb for a change

- Do you need a Change Record?

Is authorization/approval is necessary?

or

Does it needs to be on the Forward Schedule of Change?

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# Types of changes

## Emergency

- Must be done as soon as possible to maintain SLA, resolve major incident

## Normal

- Not emergency or standard

## Standard

- Pre-approved, low risk, Change that is relatively common and follows work instructions

## Service Request

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

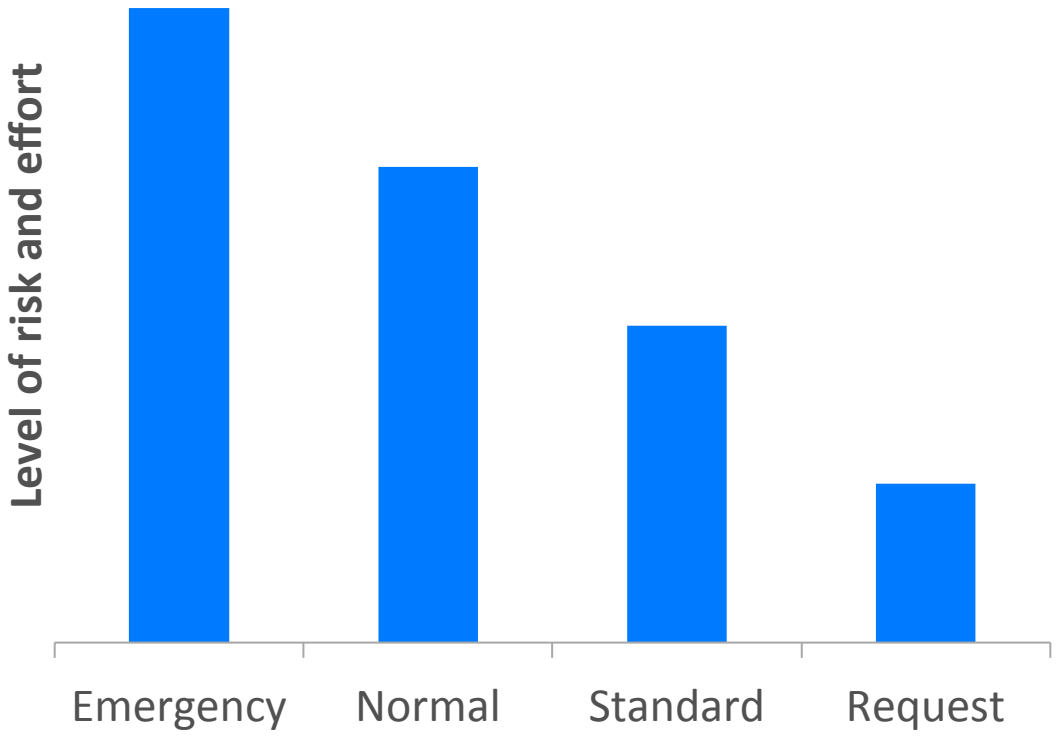
## Change model

- Predefining the steps that should be taken to handle a process in an agreed way.
- Ensure that such changes are handled in a predefined path and to predefined timescales.

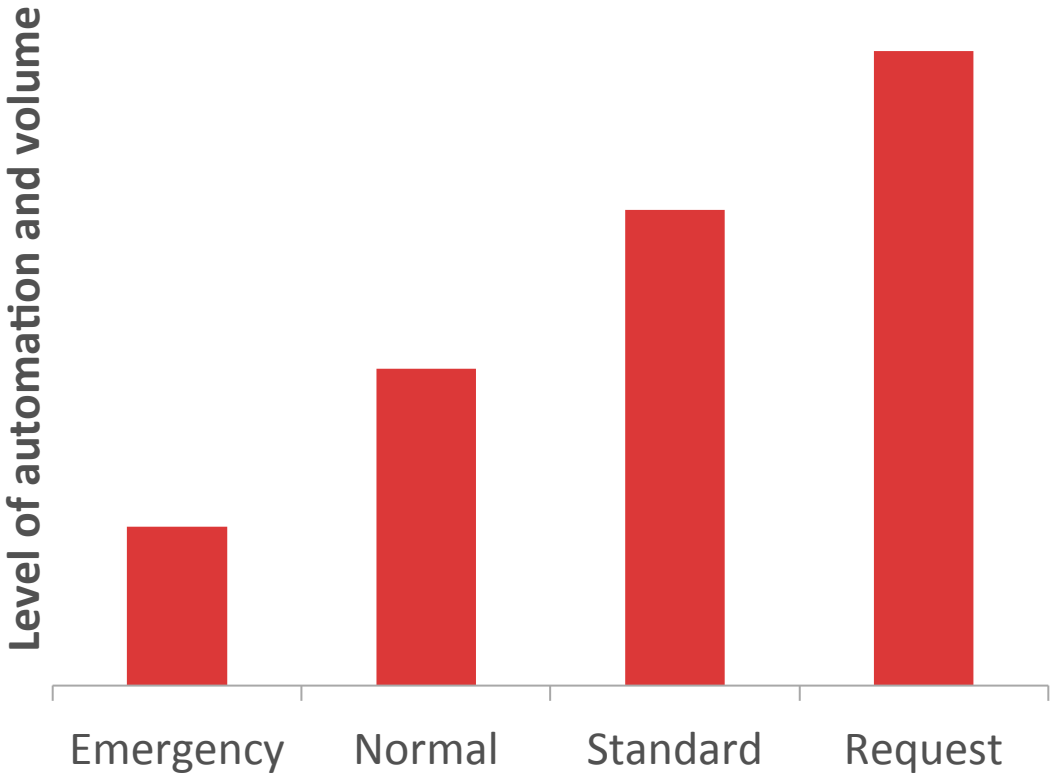
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# Understanding types of change

## Risk and effort



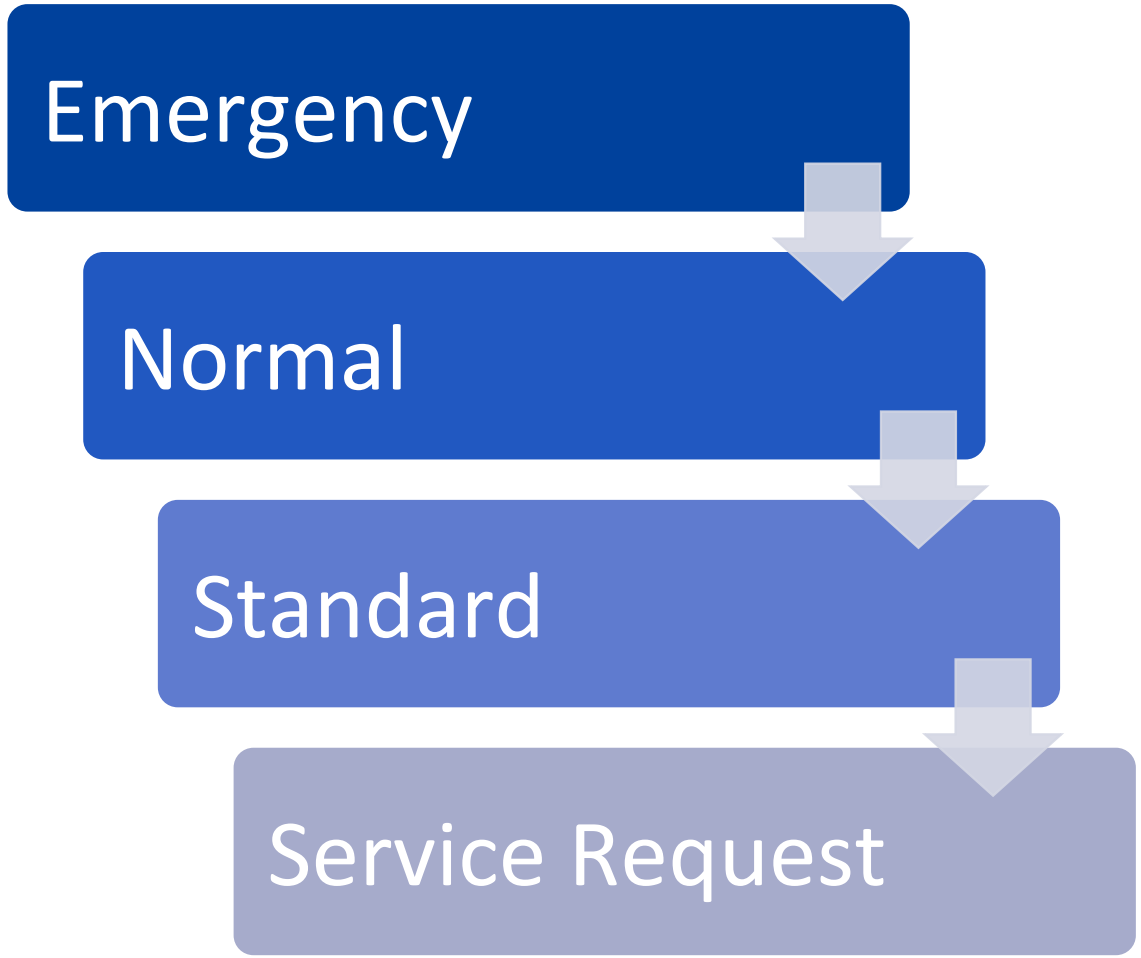

## Automation and volume




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# Start to automate

- Work down the chain
  - Reduce the level
- Speed up a Standard Change, and make it a Service Request
  - Need a new server? Automate its deployment!
- Reduce risk by standardizing
- Feedback from Post Implementation Reviews into Continual Service Improvement




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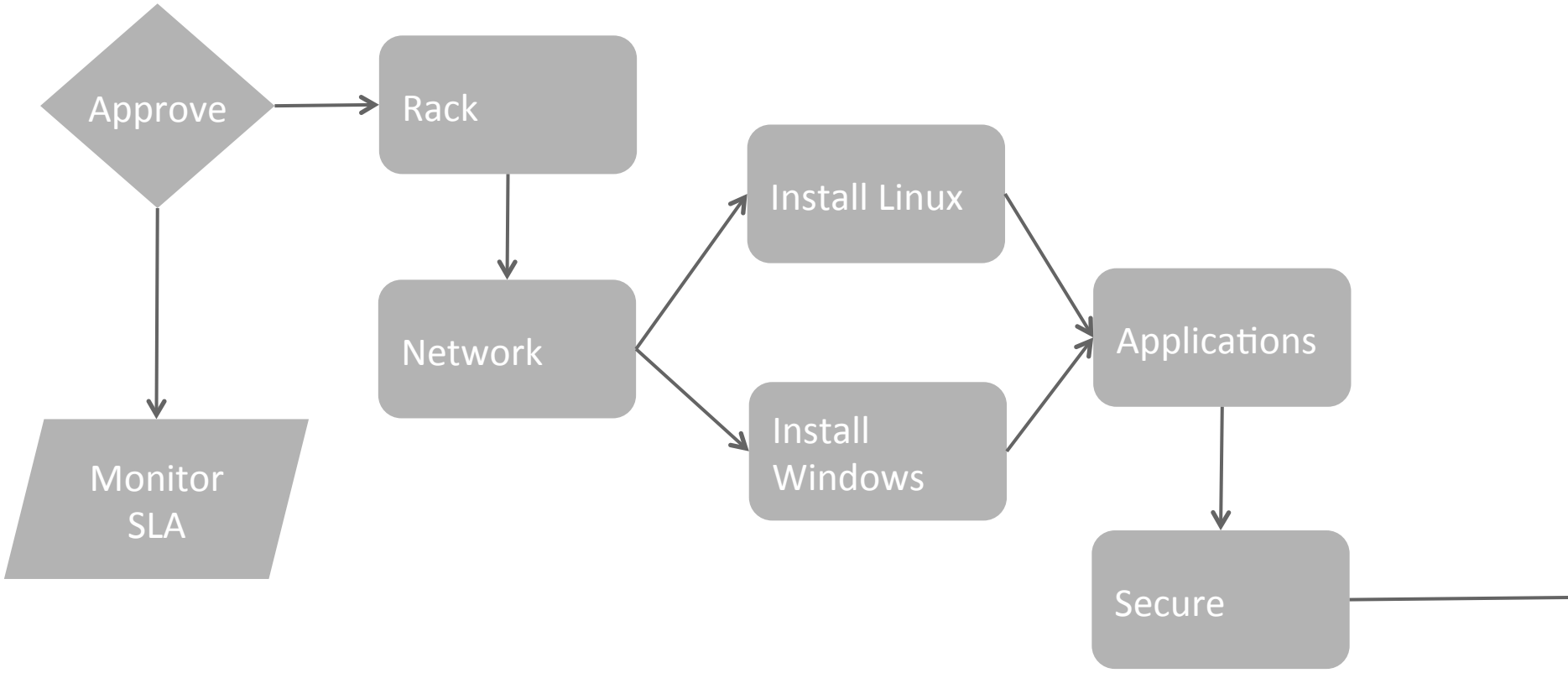
# Change Models

Automating assignment and approvals

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# Change Models

- Install new server
  - Insert in racks
  - Connect to network
  - Load OS
    - Have a choice!
  - Install application
  - Run security scan
  - …
- New employee
  - Service Request?




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# Generic 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 build out what works




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# Exercise 1 – Change Models through workflow

- Goal
  - Save time by predefining steps
  - We'll create generic workflows that can be chosen when the change is created
- Method
  - Create two workflows with data driven tasks
    - Single task
    - Two tasks
  - Add a field to choose the workflow
  - Create a workflow starter to trigger the right workflow
- Steps
  - Listed in exercise 1
  - Lots of them! Ask for help if you need it

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# Creating standard changes

## Publishing to the Service Catalog

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# Understanding the Service Catalog

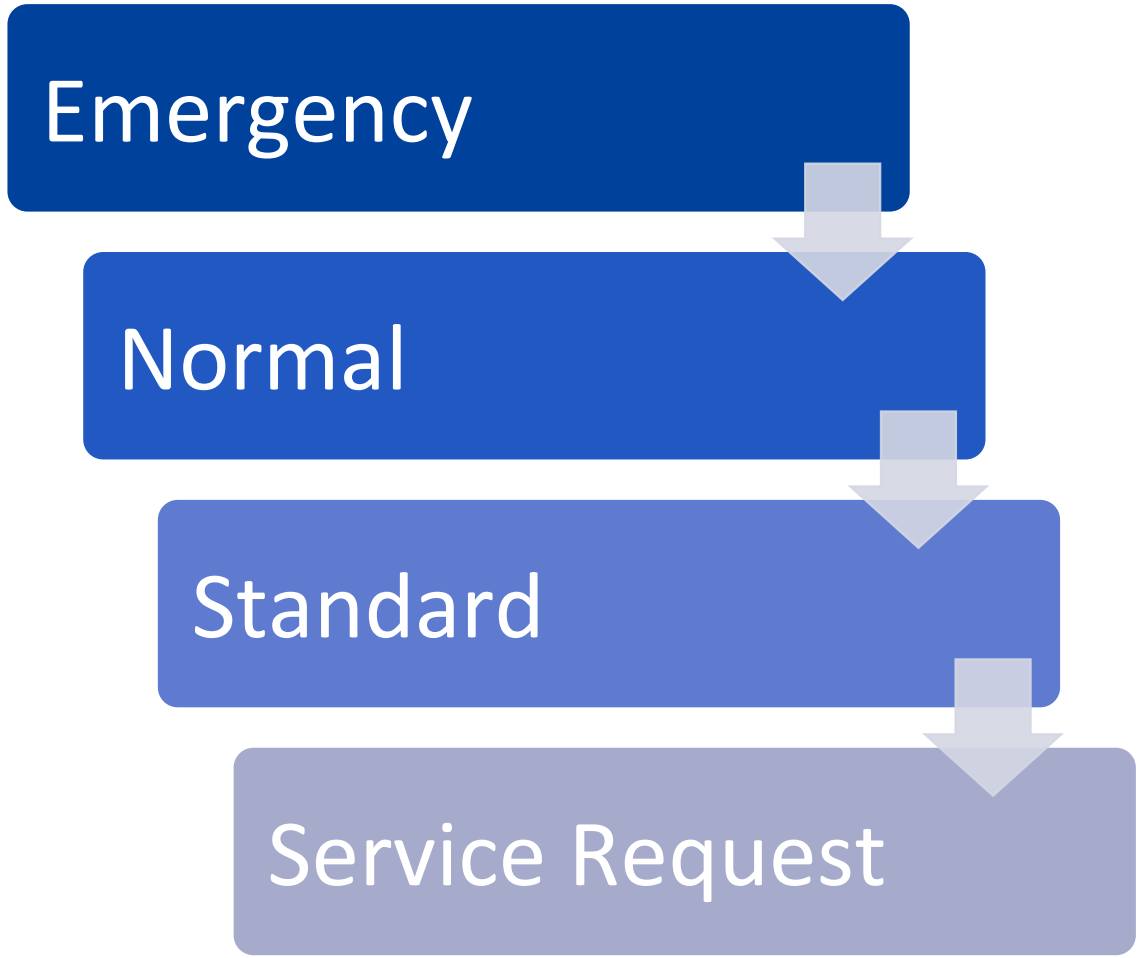
- The Service *Request* Catalog
  - Order and consume items
  - Initiate requests
- The one stop shop for IT
  - Often used for Incident Management
  - Why not Change?
- The “Consumerization of IT”
  - Internal and external focus
  - Make raising a Change easy, and avoidance may decrease!
  - Provide extra help text, a simple interface, and useful options
- Different catalogs for IT and End Users



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# Service Catalog strategy

- Identify appropriate changes
  - High volume
  - Well understood
  - Little deviation
  - Probably little or no 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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# Understanding the Service Catalog

## Bespoke

- Custom Catalog Item for each change

- Advantages
  - Ask relevant questions
  - Provide relevant help text
  - Do custom processing
  - More control!
- Disadvantages
  - More configuration necessary
  - Needs testing

- Demo!

## Generic

- Single Catalog Item, but can pick from a variety of templates

- Advantages
  - Data driven, via templates
  - Very simple to add new templates
  - Faster changes!
- Disadvantages
  - Less information
  - Less relevancy

- Let's build it!

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# Exercise 2 – Creating standard changes

- Goal
  - Make it easy for End Users to request Standard Changes
  - Define a data driven Catalog Item
- Method
  - Create two templates
    - Change SAP form
    - Create report in PeopleSoft
  - Create a Catalog Item Record Producer to create a Change Request record
- Steps
  - Listed in exercise 2

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# Post Implementation Review

Understanding what happened

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# What ITIL says

## Post Implementation Review

- Takes place after a change has been implemented.
- Determine 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 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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# Exercise 3 – Creating standard changes

- Goal
  - Get feedback from Assigned to on how the change went
  - Gather information for metrics
- Method
  - Create a survey
    - Sample questions
    - Runs after every change
  - Create a change, and test!
- Steps
  - Listed in exercise 3

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# Wrapping it up

Some final thoughts

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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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# Final thoughts

1 Automate with Change Models

2 Make it easy with the Service Catalog

3 Find out success with Post Implementation Reviews

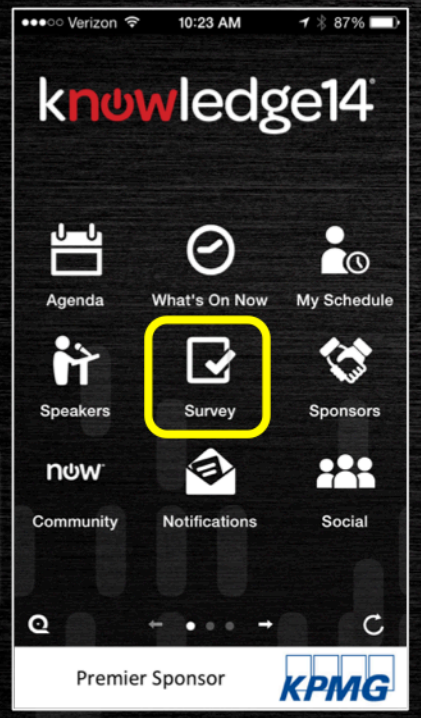
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# More resources

- 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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# Tell us what you think!




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# Thank You

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