Best Practices For Change Management

Change Management sounds great in ITIL theory but many organizations struggle with it. Everyone appreciates the value of an effective Change Management process. However, a common complaint voiced by many well intentioned IT managers is that Change Management can be difficult to implement and manage because of what are perceived to be very bureaucratic procedures. Many face major resistance to a “control” culture and what are often unfriendly processes. These are definitely some of the pitfalls. But these can be overcome and once they are, the benefits are felt almost immediately and well worth the effort.

Here are some general guidelines and best practices to consider for effectively implementing and managing Change Management:

• **People, Processes & Technology – All Three Are Equally Important!**
  For an effective Change Management process, you need to invest equal effort, time and resources in all three areas of People, Processes and Technology. Any implementation or ongoing management effort that lacks focus in one of these three areas has a high risk of failure. You cannot implement a good tool (technology) without a good process to support it and skilled, knowledgeable people to use it. Similarly a very good, well documented process is nothing without knowledgeable people following standards and required procedures and using tools to enable and support it.

• **Deploy An Effective & Timely Awareness & Education Plan**
  Awareness and education plays an important part in the implementation and management of ITIL theory. When designing your Change Management process you need to involve everyone who will be using it. For them to truly buy into your process and support the change you are imposing on them, they need to feel part of the process, and understand the value. Also, remember to involve all stakeholders including: senior management and executives, IT staff, users/customers, business heads, process owners, etc. And customize your awareness and education campaigns to address every group’s specific needs and situation.

• **Who's Driving The CAB?**
  Give very careful consideration to the key role of Change Manager within the Change Advisory Board (CAB). Choosing the wrong individual to fill this key position can create major problems, and may be the biggest mistake you make in trying to establish an effective Change Management process. The Change Manager role within IT never lacks challenges and wears many hats including: business expert, change agent, facilitator, organizer, tactician, leader, customer service expert, analyzer, problem solver, planner, negotiator, decision maker and more! The person in this key role must possess many skills but often organizations make the mistake of not appointing the right individual, or not giving the appropriate level of authority and seniority to the role.

• **Who's In The CAB?**
  Another important aspect about the CAB is making sure that those involved in the process are aware of their roles and responsibilities. And making them accountable for the role is also a key success element. Members of the CAB may change depending on the specific set of circumstances. Members typically include: Service Managers, Release Managers, Configuration Managers, Project Managers/Leaders, Technical Architects, Business Relationship Managers, and Business Managers/Customers. While it is important to include the right people, what’s really critical to the success of the CAB is having well documented standards, making sure there’s a very good understanding of the process by all CAB members, and ensuring that members understand roles and accountabilities.
• **User Friendly Procedures**
  What makes a good Change Management process? This may receive varied answers, but generally speaking a good process is one that enhances what is done as well as how it is done. Simplistic as it might sound, a good process is one that people want to use because they understand it, and more importantly, see the value of it. Change Management is a critical process within ITIL's IT Service Management process model. There are strong links to many other processes and activities including the Service Desk, Incident, Problem, Release, Configuration and Service Level Management. Because so many different groups and processes are involved, there is sometimes a tendency to create a very complicated web of standards and procedures. Keep it simple. Be careful to avoid bureaucracy.

• **Is Your RFC EZ?**
  Make sure your RFC (Request For Change) process and form are not complicated. They should be thorough, to ensure that sufficient information is covered but strike a good balance between the need to have detail, against the need to keep it simple (remember the KISS rule). Also, automate whenever possible. And, avoid multiple layers of sign-off and authorization.

• **Continuous Improvement**
  How should you keep the process alive? From an ongoing perspective, don't think that once your Change Management process has been approved and is in use, that you can now sit back and watch the fruits of your labor! Unfortunately, at this point the battle is only half won! To make a good process work, you need to continuously review its effectiveness. At least once a year, conduct a formal process maturity assessment and make sure that what you're doing still adds value to the bottom line. Where you see errors or deviations, act on them immediately and implement enhancements.

**In Conclusion**

Change Management requires careful planning and ongoing attention, not just from IT but organization wide. To ensure success, it's also important to involve your internal business partners and customers in the change process. The more you have your customers and business heads on your side the more they will start trusting IT. Together with trust, comes a better working relationship and so the ability to achieve the ultimate goal - benefit to the bottom line.

**Want To Learn More?**

1. Attend Pink Elephant's **ITIL Implementation Road Map** at one of the locations below. This unique two-track workshop includes a major session about how to implement and manage ITIL's Change Management process, and the important integration with other key processes.
   - Vancouver, March 2 – 4, 2005
   - Dallas, April 13 – 15, 2005

The ITIL Implementation Road Map is being presented in numerous locations throughout 2005. To view the detailed agenda, and for a listing of all dates and locations, click here: [http://www.pinkelephant.com/pinkevents.asp?confid=rm5&id=pl48n2](http://www.pinkelephant.com/pinkevents.asp?confid=rm5&id=pl48n2)
2. Attend Pink Elephant’s **ITIL Service Manager Certification Program**, which is next being delivered in **Toronto** as outlined below. The program is the most comprehensive, intensive and in-depth of the ITIL certification courses.

   - Orientation – May 20, 2005
   - Classroom – June 13 – 17, 2005
   - Classroom – July 11 – 15, 2005
   - Exam – August 4 – 5, 2005

   To view the course outline, and for more dates and location, click here:  

3. Attend Pink Elephant’s **Managing The Changing IT Infrastructure According To ITIL Best Practices**, which is next being presented in **Toronto** on **April 25 – 27, 2005**. The primary focus of this practitioner level certification course is on Change, Release and Configuration Management Processes.

   To view the course outline, and for more dates and location, click here:  