Do’s & Don’ts For Effective Configuration Management

Most everyone agrees that it is a major undertaking to implement and maintain a fully integrated Configuration Management process, including a consistently accurate Configuration Management Data Base (CMDB), but it’s definitely worth doing because the potential payback to the business is very high.

The business payback is large because the CMDB is the strategic core of the ITIL framework that supports all of the other service support and delivery processes. Consequently, an up-to-date and accurate CMDB empowers an IT organization to manage the components of its IT services (Configuration Items - CI) in order to maximize their positive, and minimize their negative impact on the business.

Here are some Do’s and Don’ts - general guidelines and best practices - to consider for effectively implementing and managing an effective Configuration Management process, according to ITIL best practices.

- **DON’T underestimate the time it takes to implement an integrated Configuration Management process.**
  
  Many organizations underestimate the time it takes to implement Configuration Management. Of all the service management processes, this is one of the most time consuming and complex, and often organizations do not plan effectively for it. A phased in approach is recommended with clear and realistic milestones, and all important quick wins, built into plans.

- **DO a process maturity assessment before starting.**
  
  One of the first important steps is to assess your current process maturity level, and once determined, planning can then take place to identify scope, goals, time frames and specific action items. Many organizations strive to take their Configuration Management process to at least a “Control” level of maturity (refer to PinkLink August 2005 issue). Every situation is different but by way of general timeframes, this can take a small IT organization between four to six months, a medium size organization between six to nine months, and a large size organization up to twelve months, or longer.

- **DO establish the proper CMDB scope and CI level of detail.**
  
  What's right for your organization? This is a key question to answer. Determining the scope and level of detail is an important aspect of setting up Configuration Management. If the CMDB scope is too small, important parts of the infrastructure won’t be easily checked, fixed, secured or restored. If the CMDB scope is too large, the cumbersomeness of the database will be an obstacle that slows down all service management processes. If there are too many CI levels, attributes and relationships it will take a great effort to maintain the CMDB. Too little detail can mean recording insufficient information about the CIs and related incidents, problems, known errors and RFC’s. When determining the depth and the relationships to be covered, the requirements, associated workloads and available resources must be carefully balanced.

- **DON’T implement Configuration Management without Change Management.**
  
  Change and Configuration Management are tightly coupled processes, and work very closely together – in fact you can’t really have Configuration without a mature Change process already in place. As soon as the CMDB is populated, there has to be some level of Change Management in place to ensure that CIs and other data are kept up to date. Change Management provides the major input for updating the CMDB, and Change Management
drives compliance for Configuration Management. The scope of the two processes needs to be closely aligned.

- **DON'T limit education to just ITIL Foundation level.**

  In order to fully grasp all that is required to implement and manage an effective and fully integrated Configuration Management process, key managers and other stakeholders should participate in ITIL Practitioner and Management level certification to ensure more that just high level theory and concepts are understood. ITIL Practitioner level education and certification specific to Configuration, Change and Release Management processes is available.

- **DO choose the right software tool.**

  For all but the smallest systems, Change Management and Configuration Management support tools are essential. Paper based, manual systems are impractical. It's critical to the overall success of Configuration Management that the tool chosen is flexible and can support integration with other processes (e.g. Change, Release, Incident, Problem, etc). Considerations for an effective tool, including planning for and obtaining budgetary approval, should start as part of the initial project planning activities.

- **DO carefully consider requirements for a Configuration Manager and a Configuration Management team.**

  A Role Specification for the Configuration Management process should be developed during the planning stage. There are many factors to consider when planning roles and responsibilities including:
  
  - the size of the IT Infrastructure, the level at which control is to be maintained in relation to the number of CIs to be controlled
  - the type of support tools available; manual versus automated processes
  - the complexity of Changes and Releases
  - the need to have dedicated focus versus joining efforts with Change and Release Management

**In Conclusion**

Configuration Management contributes to the cost-effective provision of high quality IT services. With very careful planning and ongoing attention, IT organizations can achieve successful outcomes and the ability to achieve the ultimate goal - benefit to the bottom line.

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