Change Management for Service Desk Processes

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Session Description

Most of us understand change management from the ITIL perspective—typically in the form of changes rolling into our IT infrastructure. But what about changes to internal service desk processes? Changes here can be fast and furious, and are often unmanaged. That’s how it was for Continuum’s service desk, until they introduced an internal CAB and change management process. In this session, you’ll see how they implemented a standardized process and internal tool changes that follow a monthly release schedule that made an enormous difference in the communication, training, and auditing of process change.

Speaker Background

Jacque Rowden is freakishly certified and experienced in the help desk management world. She is a certified MCSE, HDI Support Center Manager, and HDI Support Center Director who has also earned KCS certifications and, long ago, a BS in biology. Jacque has managed global technical support teams for more than thirty years, and she currently manages a help desk team of 160 with 61,000 external customers. She loves her work, her team, and her customers, and meeting others who feel the same.
Using Change Management for Help Desk Processes

Jacque Rowden
Why Change Management for Internal Processes?

Top complaints of team members, always:

- Communication
- Change

Who is ITIL?

- SPOC
- CAB
- KCS
- Continuous Improvement
What is Change Management?

• Deming Cycle - PDCA
  1. Plan
  2. Do
  3. Check – AUDIT (Trust? Verify!)
  4. Act - Revise

Examples

• HDCM-13
  – Define Consistent Language to use when Referring to our Partners

• HDCM-56
  – Add a Punch Clock system and have Technicians use it to log time worked

• HDCM-125
  – Deploy a Script to keep the computer from “Sleeping” when scheduling Overnight Work
Why Change? Provide the Following Data:

- Business Case:
- Stakeholders (Affected Parties):
- Benefits:
- Negative Effects:
- Consequences if not implemented:
- Cost:
- Communication Plan:
- Pilot Plan:
- Audit Plan:

CAB Process of a Proposed Change

- Change is requested and enters a “Backlog” of suggested changes
  - Anyone can submit a change
CAB Process of a Proposed Change

- CAB meets weekly to review the Backlog
- The CAB then determines where to categorize the proposed change:
  - On Hold: May be taken up in the future, but not in the immediate timeframe
  - Authorized: Approved to move forward
  - Formulation: Needs additional information before Approval or Rejection
  - Rejected: CAB determines this change is not valid/necessary

Changes are Prioritized based on several factors:
- Proposed change has been reviewed and approved (with sufficient information)
- Impact
  - If an Emergency, this would be sent to Emergency Change Advisory Board for approval
- Level of Effort
- Current Release Calendar
  - Avoid too many large-scale changes at one time
CAB Process of a Proposed Change

- Once prioritized, proposed changes are assigned
  - The Assignee will manage the proposed change, and coordinate with cross-functional teams if necessary
  - Assignee can be a member of CAB or other employee with knowledge/skills relevant to the proposed change

- Additional teams are involved (if necessary)
  - Engineering
  - Marketing
  - Human Resources

CAB Process of a Proposed Change

- Once an item is assigned, a Pilot will occur (if possible)
  - Pilots should be used if possible, as a pilot can show impact and effectiveness in a real-world scenario
CAB Process of a Proposed Change

• Check-In
  – Prior to the release, CAB will confirm the Proposed Change will be ready for the release day

• Communication Plan
  – Communication plan is distributed prior to the release
  – Documentation is to be updated in conjunction with the release
  – Any additional training necessary in regards to the release is given prior to the release
CAB Process of a Proposed Change

• Release Day
  – A changelog is given to all staff indicating the changes that were made, and any affects it may have on operations

• Auditing occurs after the change goes live
  – Data is attached to the Change item in an ongoing fashion, and will be reviewed by the CAB for effectiveness (and improvement opportunities if necessary)
Live Review of an Email Changelog

Live Review of a TechTalk

Helpdesk Monthly Change Log
continuum
IT management platform

Log In
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