



No Surprises!



The Support Center's Role in Successful
Change and Release Management

How Change Impacts the Support Center

- Increased:
 - Contact volume
 - Stress
 - Support costs
- Decreased:
 - Customer satisfaction
 - Support Center moral
 - First contact resolution



More than IT is changing...

ITIL expands the role of the support center

An ITIL Service Desk:

- Extends the range of services beyond handling incidents and problems
- Provides an interface for other activities such as:
 - Customer change requests
 - Service Level Management
 - Configuration Management
 - Availability Management
 - Financial Management for IT Services
 - IT Service Continuity Management



The Service Support Cycle



Deming
Quality
Circle

“We have learned to live in a world of mistakes and defective products as if they were necessary to life. It is time to adopt a new philosophy.”

~ W. Edwards Deming, 1900-1993

The Service Desk Role

- The Service Desk supports the integration and management of change across distributed business, technology and process boundaries
- Reactive activities include:
 - Managing incidents
- Proactive activities include:
 - Communication
 - Preparation
 - Training



The Service Desk Role (cont.)

Change Management participation includes:

- Proactively communicating the impact and cost of change (to the Service Desk)
- Registering Requests for Change (RFCs)
- Serving as the Voice of the Customer (when needed)
- Issuing the Forward Schedule of Change (FSC)
- Communicating the status of changes
- Implementing changes (e.g., Standard Changes)
- Registering incidents related to changes
- Registering incidents related to unauthorized changes
- Providing valuable management information

The Service Desk Role (cont.)

Release Management participation includes:

- Communicating the Release Calendar
- Communicating the status of releases
- Ensuring Service Desk requirements are included in the project plan for a release
- Preparing the Service Desk to support a new release
- Participating in User Acceptance Testing
- Supporting / participating in a pilot release
- Receiving and reviewing problems and known errors
- Providing valuable management information

Determining Support Requirements

- Determine support expectations
- Map support expectations to current capabilities
- Determine staffing, training and technology requirements
- Calculate estimated support costs



Support Considerations

- Business need / criticality of product / system
- Budget allocation
- Fit within defined Service Desk scope
- User base size
- Skill requirements for Service Desk
- Availability of second and third line resources
- Existing relationship(s) with supplier(s)
- Proper engagement of process
- Availability of alternative support options

People Requirements

- Staffing requirements
 - Size and technical expertise of user base
 - Complexity of product / system
 - Planned training
 - Expected contact volume for initial / ongoing implementation

Expected contacts per month = X% of customer base

- Training requirements
 - Product / system overview
 - Technical training
 - Process / procedure training
 - Troubleshooting / known error handling

Negotiate having a SME on site / on call day one (for X days)

Process Requirements

- SLAs, OLAs, UCs
- Incident Management
 - Priority definitions / escalation paths
- Problem Management
 - Known errors / workarounds
- Knowledge Management
 - FAQs
 - Knowledge base solutions (e.g., from 3rd party vendors)

Process Requirements (cont.)

- Documentation
 - End user documentation
 - Technical documentation
 - RFC / Release records
 - ✓ Release plan
 - ✓ Communication plan
 - ✓ Backout plan
 - ✓ Implementation plan
- Change and Release Management reporting requirements
- System administration procedures

Technology Requirements

- Product / system installed in Service Desk / lab
- ITSM Tool requirements
 - Category, type, item data
 - Business rules
 - Reports
 - Customer data
 - Configuration Item (CI) data
- Telephony requirements
- Contact management system requirements
- Associated support tool requirements
 - Remote diagnostic, system administration

Information Requirements

- Release contents (related RFCs)
- Impact statement
 - On business
 - On related systems
- Rollout schedule
 - System test
 - Pilot
 - Go live
- Implementation approach
 - Phased
 - Big bang

Information Requirements (cont.)

- Problems, known errors, workarounds from development, system test, pilot
- Change / Release-related contact information
 - Customer liaisons (business contacts)
 - Project manager
 - Release manager
- Vendor contact information / procedures
 - Contract details
 - Warranty details

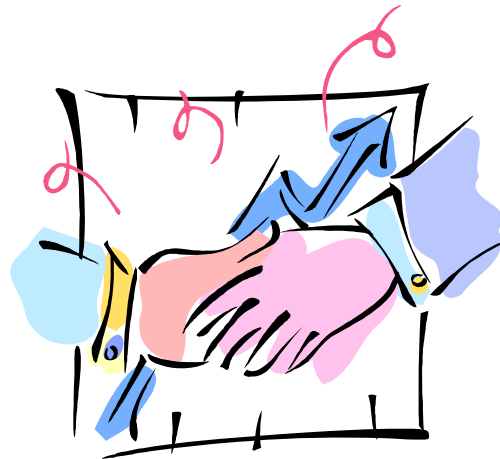
Implementing Support Acceptance

A support acceptance process ensures the Service Desk has sufficient information to:

1. Fully understand the expectations and requirements for providing support for an IT product / system
2. Make a determination of whether to accept or decline support of a new product / system
3. Provide support cost information back to project managers for inclusion in the product / system business case

Implementing Support Acceptance (cont.)

- Create a Support Acceptance Form
- Create a Support Acceptance Checklist
- Promote the benefits
- Show Proof of Concept



Support Acceptance Form

- Brief description of product / system
 - Capability it is providing the business
 - Business function supported
- Value of product / system to the business
 - Critical business process?
- Related projects
- Projects / systems being replaced
- Type of product / system
- Technical architecture
- Integrated products / systems

Support Acceptance Form (cont.)

- Are maintenance contracts in place / being negotiated?
- Is system administration required?
 - Who is providing?
- Is Service Desk support during the system test expected?
- Is a pilot being conducted?
 - What are the planned start and end dates?
 - Is Service Desk support during the pilot expected?
 - How many users are participating?
- When is the planned production release?

Support Acceptance Form (cont.)

- Number and location of users requiring support following production release?
 - Provide dates / describe implementation phases (if applicable)
- What is the plan for training users?
- Can users install this product / system themselves?
- Describe peak processing periods or other factors that may generate higher contact volumes
- During what hours / days is Service Desk support expected?
- During what hours / days will second line / third line support be provided?

Support Acceptance Form (cont.)

- Indicate the anticipated types of support calls for this product / system
 - Installation / Access – Incidents
 - Installation / Access – Requests
 - Application functionality – “How to”
 - Application functionality – Incidents / Known Errors
 - Data errors
 - Infrastructure-oriented – Incidents
 - Business process-related – Incidents
 - Other (Please describe)

Support Acceptance Form (cont.)

- Indicate the degree of support expected for this product / service
 - **Platinum** – Service Desk works up to one hour attempting to resolve incident before escalating
 - **Gold** – Service Desk works up to 30 minutes attempting to resolve incident before escalating
 - **Silver** – Service Desk works up to 15 minutes attempting to resolve incident before escalating
 - **Bronze** – Service Desk works up to 5 minutes attempting to resolve incident before escalating

Support Acceptance Checklist

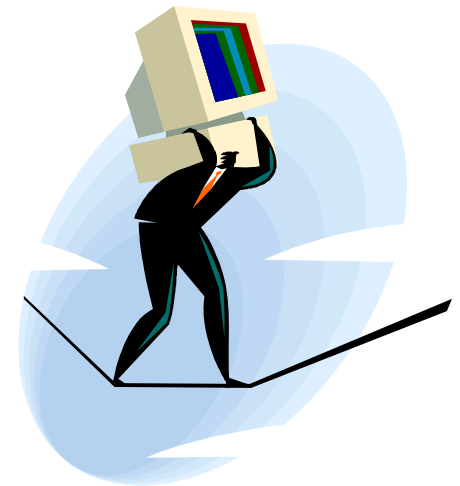
- Project Leader submits Support Acceptance form
- Service Desk analyzes completed form
- Determine support options (including associated costs)
- Negotiate support expectations (as necessary to justify costs)
- Select Service Desk representative
- Meet with Project Leader to establish Support Acceptance Checklist (this document)
- Add Checklist tasks to Project Plan

Support Acceptance Checklist (cont.)

- Service Desk / Project Leader determine support requirements
 - People, Process, Technology, Information
- Service Level Manager negotiates / Refines SLAs, OLAs, UCs
 - Communicates to Service Desk / IT / Customers / Users
- Service Desk attends Project Status Meetings (or obtain meeting minutes)
- Assess status of project relative to Checklist
 - Identify issues, concerns, required Checklist revisions
- Promote awareness of the new product / system within the Service Desk

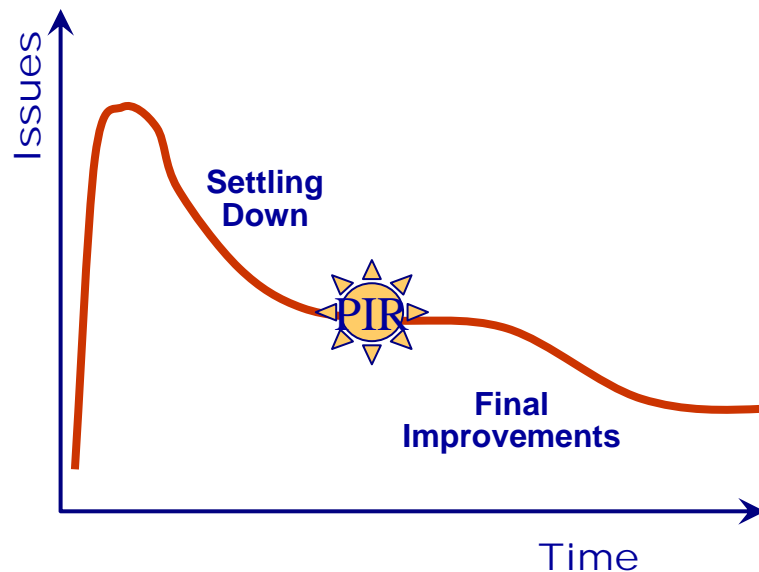
Support Acceptance Checklist (cont.)

- Negotiate SME resources required for post-implementation support
- Implement required changes to:
 - Staffing levels
 - Service Desk processes and procedures
 - Service Desk tools and technologies
- Prepare / Deliver required training
- Verify L1 / L2 / L3 readiness
 - All support requirements satisfied
- Service Desk signoff
- Begin support



Checking the Quality of Change

Both failed and successful Changes are reviewed after a pre-defined period



- ✓ Did the Change achieve its objectives?
- ✓ Are customers satisfied?
- ✓ Number of expected incidents?
- ✓ Number of unexpected incidents?
- ✓ Were resources used as planned?
- ✓ Did it implement on time/budget?
- ✓ Did the backout plan function correctly?

Checking the Quality of Change (cont.)

- A high percentage of Change and Release Management process metrics require incident / Service Desk data
 - Breakdown of reasons for Change (User requests, enhancements, business requirements, service requests / incidents / problem fixes, procedures / training improvement, etc)
 - Number of incidents traced to changes and the reasons
 - No evidence of unauthorized reversion to previous versions at any site
 - No evidence of use of unauthorized software at any site

Summary

- Don't be a Victim!
- Communicate the Service Desk's requirements early and often
- Engage a willing Project Leader
- Pilot the Support Acceptance Process
- Show Proof of Concept

