From Zero to Hero: A Case Study in Change Management

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Session Description

Want a demonstration of the evolution of change management at Elon University? This session will tell you everything you need to know about the common challenges that businesses encounter when attempting to develop and implement change management. You’ll leave with the knowledge to effectively navigate the buy-in process for stakeholders, get the right people involved in your CAB and run the meetings effectively, and ask the right questions when evaluating proposed changes.

Speaker Background

Ryan Gay is the manager of service management and project lead for Instructional and Campus Technologies at Elon University. When not leading implementation initiatives that generate a campus-wide impact, he focuses on building and improving processes between the service desk and the rest of technology at Elon.
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About Elon University

- Founded 1889
- Approx. 6,800 students (undergrad and grad)
- 425 full-time faculty
- Approx. 70 full-time staff in Instructional & Campus Technologies
- Campus Technology Support, Application Technologies, Teaching & Learning Technologies, Information Systems and Technologies, & Information Security
Our Key Challenges

• The Buy-In Process
• How and where to start?
• What to ask when evaluating changes?
• Finding the right CAB
• Differentiating standard vs. normal

Our Outcome

• Optimized support (first tier and beyond)
• Less downtime
• More productivity
• “Trickle Down Happiness”
In the beginning…

The Big Bang:
Partnering with the Auditor
Identify our business needs

- Documentation
- Transparency
- Collaboration & Communication
- To be deliberate, nimble and thoughtful
- More control to protect enterprise

Adopt and Adapt

- Take what’s needed/what works
- Get rid of what’s not needed/doesn’t work
- Bend what you need to make it work for your environment
Solution to the Buy-In Problem, Part I

- Start early!
- Find the influencers
- Be cognizant people don’t like change
- Get people in at the beginning of “Why we are doing this?”
  - Offer Change Management crash course
  - We waited and it would have been much better to do earlier than we did

Where we started

- Support of ACIO and Directors
- Basic RFC Form on SharePoint
  - Description, Date, User Base Affected
- Master Change Registry
  - Document known changes
- Establish CAB
  - Meet every other week
  - Review completed and approve new changes
- Documentation
  - Easily accessible wiki documentation that helped with Buy-In because people had a workbook of how it worked to familiarize themselves with
### SharePoint RFC

<table>
<thead>
<tr>
<th>Change Type</th>
<th>Source of Change</th>
<th>Open/Closed</th>
<th>Was this change Successful?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Application</td>
<td>Open</td>
<td>Yes</td>
</tr>
</tbody>
</table>

#### How long is the change anticipated to take? (e.g., 6:00am-12:00pm; or all day)
- Time: 9:00pm - 1:00am

#### Brief Description of Changes
- Our Moodle vendor needs to upgrade our servers on the evening of March 21st. The downtime will begin at 9pm...

#### Communication Plan
- I have communicated the downtime with the Service Desk as well as with all graduate programs that are in sessions...

#### Back-out Plan
- We can contact our Moodle vendor if we need to back-out.

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### Challenge: The Right CAB

- When we started, loose org. that only flagged changes as risky to ACIO, we did not meet or review changes
- Clearly identify Change Manager
  - Original took back seat and CAB operated like it was majority approval, even though it ultimately came down to him anyway
- The more complicated CM became, the more natural it became for the CAB to be advisory (no one wanted blame)
The Right CAB (con.)

- CAB consists of:
  - 1 person from each department
  - 1 person from each level of leadership
  - Revise membership as duties and responsibilities change
  - Helps buy-in: Members are connected daily to colleagues and can provide insight on processes that would/would not work well

Challenge: How to evaluate Changes

- Back-Out and Communication plans are key!
- Things we learned to ask:
  - Who is affected?
    - Not just in department, but outside as well
  - What could go wrong?
  - Why is this necessary?
  - Is this the right time?
The Wild West

Wrangling the West
Wrangling the Wild West

• Strategy Plan
  – Business needs and goals
  – Areas to develop
    • RFC (Communication plan, timeframe, successful, what initiated change), Documentation, CAB meetings and thoughtful analysis
  – Things to implement
    • Policy, Change Schedule (via Office 365), Post-Implementation Reviews
  – Strengths, Weaknesses, Opportunities & Threats
    • This section truly provided the best understanding of what we faced moving forward

The Case of Standard v. Normal

• Many discussions of what differences are
• One of the harder concepts to shape to our environment
• Attaches to Buy-In Challenge because people resistant to filling out standard RFC every time
  – Why? They thought pre-approved just meant they could go ahead and do it.
The Verdict: Standard v. Normal

- We changed the word “Standard” to “Pre-Authorized”
- Began enforcement of standard changes being filed in system

The Kindness of Strangers

- Peer/aspirant institutions
  - Duke
  - WFU
- Insight & Advice
- Allowed us to see successful practices, policies, and what didn’t work to help inform our decisions
Solution to the Buy-In Problem, Part II

- Capitalize on failures
  - Change = outage = unnecessary tickets = more people filing changes to keep tickets from coming their way
- Service Desk as litmus test for communication
- The more deliberate you are, changes are more successful, and more colleagues will see value in the process

Edge of Tomorrow

Skyline night by Mysticartdesign, licensed under CC0 Public Domain
The Future of our Evolution

- Write & Implement Change Management policy, with governing standards, guidelines, and procedures
- Migrate from SharePoint to IT Service Management tool
  - Central location, automate workflows, more robust approval process, change calendar
- Return to Master Change Register and maximize information there
- Re-evaluate CAB membership for alignment
- Use CAB more deliberately for communication plans, remediation plans, and ways to continue to improve

ITSM-based RFC (Normal Change)
ITSM-based RFC (Normal Change 2)

The Challenge of Evolution

• As changes become more integrated, some continue to file RFCs at the last minute to avoid possible denial of approval or being forced to wait for change
• “I don’t need approval to do my job”
• Need to develop some sort of enforcement policy/procedure
Summary

- Optimized support, less downtime, more productivity, and trickle down happiness
- Happy Auditor, a happy CIO, and a happy Board of Trustees
- Start small, solicit feedback and input where possible, but still stick to what needs to be done – not everyone will be happy, so accept it
Questions?

Thank you for attending this session.

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