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# DITY™ Newsletter

*The workable, practical guide to Do IT Yourself™*

## ACCELERATING CHANGE MANAGEMENT

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By [Hank Marquis](#)

Few realize Change Management has two purposes: to limit change-related incidents *and to improve the efficiency and effectiveness of day-to-day operations.*

That last part is what most implementers forget, often resulting in a Change Management process perceived by staff as bureaucratic, unrealistic, and impossible to manage.

However, the ITIL has a solution that may be able to improve your efficiency and effectiveness, cut your Change backlog, and make IT staff more content and empowered! The secret is using Standard Changes correctly.

The ITIL describes a Standard Change as “...a change to the infrastructure that follows an established path, is relatively common, and is the accepted solution to a specific requirement or set of requirements.”

The following 7 steps outline how to identify candidates for Standard Changes, implement them, and ensure they function properly.

1. **Create a Process for Authorizing Standard Changes.** Create a *Request For Change* (RFC), involve the *Change Advisory Board* (CAB), and create a formal process for the identification, definition, implementation and management of Standard Changes.
  - a. The Standard Change requires pre-approval by Change Management before authorization. Once approved, they no longer require change management approval on a case-by-case

basis.

- b. Establish regular audit and review to make sure that as the organization changes, Standard Changes remain appropriate. Change Management is a dynamic process and should itself be under Change Management control!
  - c. Establish specific authorizations for an approved group. Be specific here, only the authorized group has permission to perform the Standard Change under certain conditions.
  - d. All standard changes require reporting on a regular basis. Put in place regular reporting, audit and review processes. First to track work completed; and secondly to evaluate 'b' above.
  - e. Create and agree to a definition of those change types that are candidates for Standard Changes, for example, "Customer Service Requests as documented in Service Level Agreements," or other similar definitions.
2. **Identify Candidates for Standard Changes.** While not all-inclusive, the following steps can help to identify candidates for Standard Changes.
- a. Ask IT Staff what changes or activities *they* think ought to become Standard Changes.
  - b. Review the change log and history for the Changes done most often. Be sure to involve functional management as well as technical staff in this evaluation.
  - c. Look for tasks that are well known, proven, and "done every day." These are the ones you should document and institutionalize.
  - d. Consider who is to perform work. Many Standard Changes begin at the Service Desk in response to Service Requests.
  - e. If cost is a factor, seek those changes where budgetary approval lies with requester.
3. **Document a Standard Operating Procedure (SOP).** The SOP lies at the heart of the Standard Change. The SOP defines when (and when not), where, how, by whom and under what circumstances the Standard Change occurs.
- a. Define the scope and timeframe for authorization.
  - b. Allow the group approved to perform the Standard Change to drive the SOP creation. This captures their organization skill-set and their buy-in to the Standard Change. *Failure to perform this step will almost certainly result in the exact opposite of what you desire.*
  - c. Do not forget to include procedures for failed Standard Changes. Change Management, and the designated lead or contact from the technical functional group that "owns" the Standard Change must examine every occurrence of failures when performing the Standard Change.
  - d. The approved group must record, track and report all changes made to Change Management.
4. **Authorize the Standard Change as Low in Organization as Appropriate.** After establishing the SOP for the Standard Change, review it to see if it a lower level of the organization can perform the task. The goal is to empower the lowest appropriate level of IT staff to perform the task. Over time as the ability to perform the Standard Change increases, it becomes "part of what we do here" -- and becomes institutionalized as the "new normal."
5. **Train, Test, and Release.** Communicate as the SOP and the Standard Change process evolves. Keep those who will do the work up to date on status.
- a. Before releasing, train staff in how to use the SOP; and if required, how to perform the tasks contained within the SOP.
  - b. Have involved staff perform supervised tests to ensure their capability and success.
  - c. Publish a date when the new process and the SOP "goes live".
6. **Put the SOP (and the Standard Change Process) Under Change Management Control.** That is, allow no changes or modifications to the SOP without formal Change

Management review.

7. **Manage, Monitor, Audit and Report.** Review the success of the SOP, and of the Standard Change process, to make sure they are indeed appropriate.
  - a. Reporting should show no adverse impact due to the Standard Changes.
  - b. Reporting should show a percent reduction in change backlog.

Standard Changes empower an organization, involve IT Staff, reduce bureaucracy, improve performance, and cost virtually nothing to implement!

Involving the functional groups and IT Staff that will actually do the work under the Standard Change allows you to absorb and formalize what they already know. Those involved will feel empowered and a part of the Change Management process. In effect, they will be driving the process from their perspective. [See '[Smoothing the way to ITSM](#)' DITY Vol. 1 #6 for more on empowerment.]

Allowing your staff to make changes they are competent and capable of performing has the added bonus of spreading the work of Change Management around the organization. Benefits of this include:

- **A Wider Appreciation of Change Management** -- Involving all levels of staff (even customers and vendors where appropriate) helps all involved understand the needs and benefits of Change Management.
- **Staff Empowerment** -- Since they helped develop the SOP, this is "their process" and they will tend to enforce it among and between themselves in ways that mandates simply cannot achieve.
- **Increased Efficiency and Effectiveness** -- The Change Manager, relieved of the work now decentralized throughout the organization, has more time to focus on those Changes that do require stringent control, ensuring higher quality of changes.

Institutionalizing work that is already getting done in your organization as Standard Changes can help you achieve the twin goals of Change Management: limit change-related incidents and improve the efficiency and effectiveness of day-to-day operations. You will also have a reduced backlog, a happier staff that is more empowered and committed, and no one will feel that Change Management is bureaucratic, unrealistic, and impossible to manage!

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