Q: Does your Change Manager have another functional role within the company, or is Change Manager their only role?
A: It's their only role, and for us it's definitely a full time job. They are the backup to Problem and configuration, and also a trainer.

Q: Could you elaborate on why there is an issue when a person is called a Change "Manager"
A: It's a cultural thing, in our environment, a Manager has certain roles and responsibilities, which are not part of our Change Manager's job description.

Q: What do you use for your Change Management/Service Management tool?
A: BMC Service Desk Express.

Q: How did you go about creating your standard changes and what requirements from the initiator are needed for a standard or pre-approved change. Can you give some examples of these types of changes?
A: We don't call them standard change, we call them recurring. These changes must go through CAB twice before becoming reoccurring. Examples include patch management, monthly re-orgs, monthly downtime maintenance - mainframe

Q: What is your ratio of urgent changes vs. non-urgent changes?
A: 10% of our changes are Urgent

Q: Are the "self"-approved changes restricted to standard changes, or are staff empowered to make a judgment call as to whether something is a low risk?
A: Team members and mangers were empowered to make this call when developing the change data collection for each level of change (self, manager, CAB). Self-approved must be minimal impact to customer, not part of disaster recovery and no security risks

Q: Were you able to discuss the 5 RFC within the allotted 30-min session?
A: Yes. We only discuss CAB level changes that have not been approved through our process (pending due to questions or sometimes lack of CAB member approvals). Do not discuss self approved changes.

Q: How do you push the persons to document the standard changes? Which best practice to mature the standard changes?
A: What drives that is our policy and corporate culture.

Q: Do you have any metrics before and after you implemented "Contractor Mandatory ITIL Change" program?
A: unfortunately no baseline for before due to the manual change control process typically mainframe changes. However, we have a benchmark as we started the new process and continue to measure against maturity

Q: How much more maturity to you think you can get if you are already at 4, and how much more expensive do you think that is going to be?
A: It's taken us the last 3 years to get funding for CMDB. We do have an inventory control program that has SACM in mind. The good news is, we did get resources to move forward with this tool. We are building strong processes, but we don't have a discovery tool yet. Our maturity level goal is 4.7 by 2012.

Q: How many Urgent Approvals do you discuss on average a month or year?
A: Average 3 to 5 per week

Q: How do you manage urgent changes and keep everything or a large percentage of changes from being urgent?

A: Must go to manager on call to be approved 1st. Work with groups who we see a trend in this area. Everything is managed through the tool

Q: You mentioned having the recurring changes appear on the change calendar, what tool are you using for that calendar?
A: We use WebEvent - PeopleCube Calendar. It does not interface with the tool so we have to manually update. We are currently working with our development team to produce a calendar that will interface.

Q: Did you build a custom calendar to detect change collisions? How do you detect collisions and overlap?
A: We use the WebEvent Calendar for this as well. A change analyst looks at it daily and the CAB looks at it before changes are made to look for collisions.

Q: Culturally, it sounds like you have very little turnover in the majority of the roles you discussed today. Is that true? Why do you think that is the case?
A: I have been with the organization for 10 years. In that time our turnover is less than 2%. Working in healthcare can be very rewarding but I believe that our culture drives the folks to stay.

Q: Change Management enforces processes from bottom up instead of top down. This makes it difficult for buy-in from all parties. How would you suggest that we approach Change Management that in order to get buy-in of processes they have to start from top?
A: It all has to come from the top. If you have total buy in from the TOP and you can show the win/win for the stakeholder, then you can win them over. If you can show where it can benefit them you will get farther.

Q: Is the CAB and Urgent Approval Board made up of some of the same staff?
A: No, there are 23 functional managers on the cab. But it works well for us. There is only 1 person that is the UAB and it is the Manager on call for the week.

Q: Do you manage your service request as recurring changes?
A: No as a general rule, but there are some. For example: All request come as Service Request, an analyst can create a change request direct from there depending on what their data collection indicates as the level of change approval required.

Q: How do you manage emergency changes that involve impacting incidents that require changes to be implemented to resolve the incident? (work them through service desk or an on-call manager with special approval authority, etc.)
A: We use the event management process owned and managed by the Service Desk. We get all together on conference bridge line and talk it out. Once the decision is made the manager on call approves making the change. Our incidents are linked to our whiteboard (major incident)

Q: Is the ITIL certification you mentioned during the presentation industry certification through a 3rd party or is it internal certification based on training you have developed?
A: I conduct ITIL Overviews for the staff and we use ITSM Academy for all of our formal education.

Q: How did you navigate the world of ITIL training and choose a vendor for training? What qualifications or certification did you look for?
A: We chose the Academy because of the customer experience we had with them.

Q: Do you have an ITIL Release Management System in place to go along with your Change Management Process, and if so, how well do they work together?
A: We are currently designing that process and look to have it up in November. We already do a lot of it with Change management and our project management methodology.

Q: How often do you review recurring changes for renewed approval?
A: Weekly. When needed we required the change initiator to attend CAB and resubmit for new timeframe.

Q: When working through the implementation project how far did you reach into the business to gather requirements or was it only within IS? How did you approach the business areas to get resources?
A: We reached out to our customers to get their input on downtime request. We had them engaged on how to communicate downtime in a business language. Customers told us when the best times were for them.

Q: How do you feel about online voting for CAB approval instead of meeting? Our CAB meeting is there just for the Changes that have questions.
A: The "voting" which is handled through automatically through SDE allows us to move the other changes through quicker.

Q: How do they handle Dev and QA within change?
A: Development is handled by committee. Control of CI is not yet done at an organization level. Just starting to do this with the introduction from SACM.

Q: Do you have a standard list of questions that have to be answered during the CAB meeting?
A: We do not have a standard set of questions as a CAB but each of our CAB members have questions based on their responsibilities. However, our change form requires input in each field and answers the necessary questions (risk, impact, rollout, backout, customer approval, facilities affected etc.)

Q: Can you explain how your release management process ties in with your change management CAB? For example, code quality control, lab testing, change window and post change/end of change window validation, etc. Does Release Mgr sit on CAB and present for proposed releases?
A: release mgmt is not in production, still in development. However, the release analyst will be on the CAB; we will require user acceptance testing sign-off; our CAB process reviews all change windows and timeframes subsequently reporting on all planned and extended changes with and without downtime. That is required on our change record.

Q: Prior to undertaking the ITIL process, what tools did you use to cost-justify the expense?
A: we were very lucky our CIO wanted ITIL framework in place and knew the education and my role would be an initial expense but they didn't go through a formal ROI

Q: How do you create job/role descriptions for ITIL process owners? Do you have any you could share?
A: Yes, see below.

<div align="center">

Service Desk and Resolver Groups
(functional areas fixing the issues)

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Incident Management
- For our clients, the Service Desk is the most important function in the BayCare IS organization
- WHY? – it's the only 24/7 point of contact we offer to them
- Therefore they deliver both **Client Perception and Satisfaction**

Incident Management Roles and Responsibilities
- Service Desk - Owns the resolution of all three types
  - Interruption
  - Request
  - Events

- "Controls" the Incident Records and influences the Resolver groups when work orders need to be dispatched
- Our skill is both managing ownership and managing <u>influence</u> to get Incident Records resolved

Resolvers –
- For the Service Desk, you are the most important function in the BayCare IS organization
- WHY? – you provide them with the remediation steps to resolve incidents
- HOW? – in two ways:
  - Quality knowledge
  - Timely resolution for work orders

Change Management

Roles
Standing Members
Change Approval Board (CAB)
- Chair of weekly Change meeting -I.S. Director
On-call or CIO and IS Manager On-call
- Functional Group Managers (applications, systems, network, telecom, disaster recovery)
- Change Coordinator

Non-Standing Members
- Analysts –such as Applications & Technology
- PMO

Standing Members Responsibilities:
- The manager is ultimately responsible for their group, and duties delegated in their absence.
- CAB representation is a formal duty with formal requirements for participation during the weekly CAB meeting
- Daily review/approval of CAB change requests, manager requests and Urgent requests as needed

Manager and Analyst responsibilities

- Managers have the responsibility, authority, and a certain amount of flexibility regarding the their group use in the change control system (i.e. exempt, self and manager level of approvals)
- Analysts have the responsibility to use the new process and application as defined by their manager
- The analyst responsible for the change must be present at the weekly CAB meeting to answer questions concerning new requests if approval is still pending, and to be present at subsequent meetings if requested to discuss the success of the change, issues encountered, and failed/backed out changes
- Each Functional Group must have a backup representative if the primary representative is not available