

A scenario-based approach to help you implement the right processes and maximize success.

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## Introduction

The Change Management module in ServiceDesk Plus ensures that standardized processes are followed while implementing a change to ensure business continuity and high availability, with minimal business risks.

This process flow guide recommends the best processes to follow while implementing the three types of changes mentioned below. These changes are explained with real-time scenarios, life cycles, and process flowcharts.

We will discuss the following types of change:

1. Major
2. Standard
3. Emergency

## 1. Major change

### 1.1 Scenario

A large email marketing company has 450 employees, and a customer base of over 20,000. Earlier on, the company used a shared physical server to host its web application and mail server software. After some time, the exponential increase in its user base and email transactions made things more complex. Emails from end users were either lost, or kept pending. As a result, the company has now incurred a high loss in both productivity and profit.

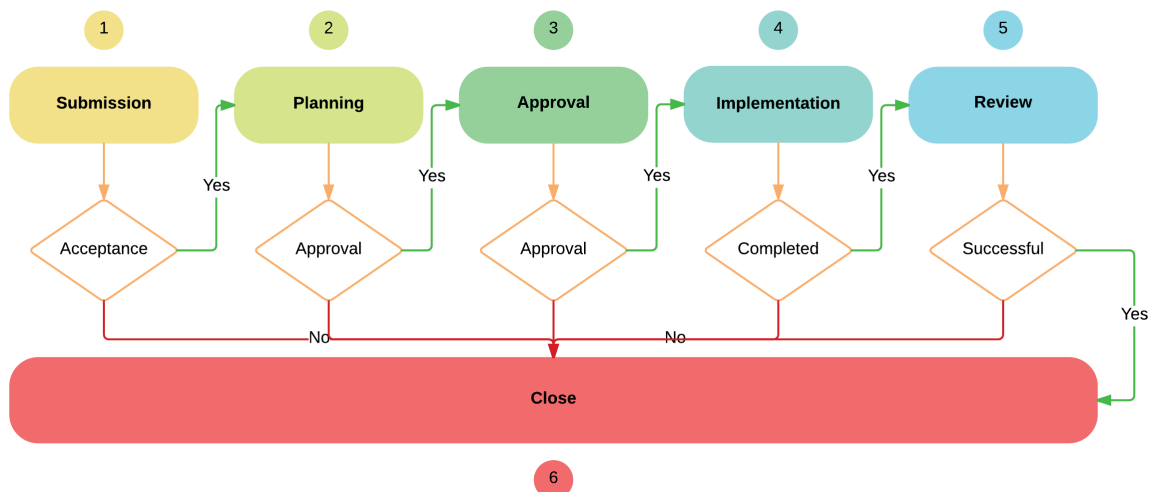
Now, let's assume that you are the IT head of this company. You have analyzed the issue, and found that the shared server is unable to manage the load from these necessary applications. You've also concluded that separate physical servers would solve the issue, and recommended a change so that the company would be able to have a hassle-free transition with minimal downtime, and less business impact.

## 1.2 Prerequisites

Firstly, identify the values and benefits that the change would bring to your organization, and the required downtime to implement it. Then, assign a suitable change manager and technician to collect information about the change. Let's say the downtime required for implementing this change is eight hours. In that time frame, employees will be restricted from sending or receiving emails in the company and accessing the web application. Therefore, there would be no business for eight hours. On the other hand, after the change is implemented, there would be separate servers for the mail server and the web application, increasing productivity, efficiency, and profitability.

Next, identify the type of change based on its impact on the organization. In this scenario, the change would impact the entire organization. So, categorize it as a Major Change. Let's say that all the major changes in your organization go through six stages.

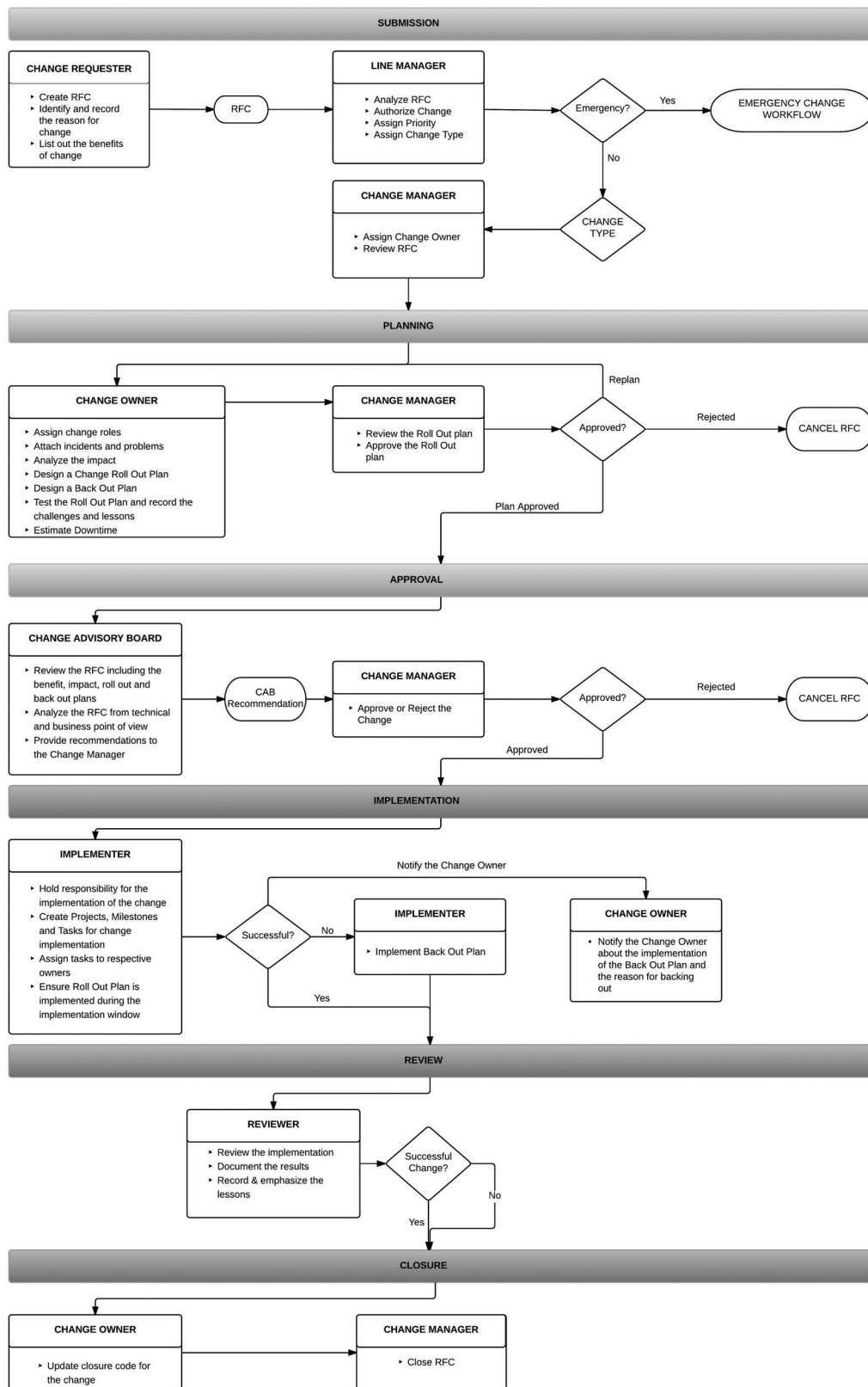
As an IT head, the next step would be to assign a technician to collect information on how this particular change would add value to the business. After you have the required information, create the change (RFC). The change request then goes through a six-stage cycle, as shown in the diagram.



6 STAGES OF A CHANGE LIFE-CYCLE

## 1.3 Recommended processes:

This workflow will give you a fair idea of the process involved in this major change.



The following screenshots of ServiceDesk Plus will help you understand how to implement a major change in your organization.

### Life Cycle of a Major change in ServiceDesk Plus:

- Submission
- Planning
- Approval
- Implementation
- Review
- Closure

## STAGE 1 - SUBMISSION:

### VIEW: CHANGE REQUESTER

All Changes ▾		Calendar View	CREATE RFC					
<b>New Change</b>	Delete	Pick Up	-- Select Technician ▾	Assign	1 - 4 of 4	⌕	⌕	⌕
						Show	25	per page
<input type="checkbox"/>		Title	ChangeOwner	Category	Priority	Change Type	Stage	Status
<input type="checkbox"/>		Server migration	Unassigned	-	-	Significant	Implementation	In Progress
<input type="checkbox"/>		Application Upgrade	Elena Makkena	Payroll Application	-	Major	Close	Completed
<input type="checkbox"/>		Security breach in the server	Unassigned	-	-	N/A	Approval	Approval Pending

**Title\*** Install new, separate physical servers for Web application and the mail server.

**Reason For Change** Productivity improvements **Identify and record the reason for change**

Description

**Benefits:** List out the values of performing this change

1. Increased productivity
2. Increased performance of the applications
3. Quick and easy schedule of emails

### VIEW: CHANGE MANAGER

Change Details [Edit](#)

<b>Emergency</b>	No	<b>Emergency change?</b>	<b>Template</b>	Major Change
<b>Retrospective</b>	No		<b>Workflow</b>	Major change <b>Associate change workflow</b>
<b>Change Type</b>	Major	<b>Identify the type of the change</b>	<b>Group</b>	Not Assigned
<b>Category</b>	Payroll Application		<b>Subcategory</b>	Not Assigned
<b>Item</b>	Not Assigned		<b>Impact</b>	High
<b>Urgency</b>	Normal		<b>Priority</b>	High <b>Prioritise the change</b>
<b>Risk</b>	High		<b>Scheduled Start</b>	N/A
<b>Scheduled End</b>	Mar 14, 2015 11:00 PM		<b>Created Time</b>	Mar 11, 2015 08:02 PM
<b>Completed Time</b>	N/A		<b>Services Affected</b>	Application Login Communication Software
<b>Assets Involved</b>	N/A		<a href="#">Go to</a>	

Roles [Edit](#)

**Assign Change Roles to the appropriate technicians and users**

<b>ChangeManager</b>	Elena Makkena	<b>ChangeOwner</b>	Howard Stern
<b>ChangeRequester</b>	Andy Dillon	<b>ChangeApprover</b>	Ariel Vivian
<b>Line Manager</b>	Cynthia Alejandra	<b>Implementer</b>	Heather Graham
<b>Reviewer</b>	John Roberts		

## Authorize Change:

☒ Accept
 ☒ Reject

Status : Requested ▼

## STAGE 2 - PLANNING:

### VIEW: CHANGE OWNER

In-Progress

☒

Submission	Planning	Approval	Implementation(0/0)	Review	Close	History
------------	----------	----------	---------------------	--------	-------	---------

**Analysis**
 Problems (1) Incidents (5)
 Attach problems and incidents pertaining to this change

**Impact**
[Edit](#) | [Attach a file](#)

Record the impact of this change here

**Roll Out Plan**

No description found. [Add](#) | [Attach a file](#) Document the roll out steps to implement the change

**Backout Plan**

No description found. [Add](#) | [Attach a file](#) Document the reversion steps in case of change failure

**Check List**

No description found. [Add](#) | [Attach a file](#) Checklist needed for implementing the change

**Downtime**

No downtime found. [Add](#) Record the downtime needed for implementing the change

Status Comments [View](#)

### VIEW: CHANGE MANAGER

Approve or Reject the plan

☒ Approve
 ☒ Reject

Status : Approval Pending ▼



## STAGE 3 - APPROVAL:

### VIEW: CHANGE MANAGER

**Install new, separate physical servers for Web application and the mail server.**

Requested by : **Avery Clayton**




Scheduled End Time : N/A

Waiting for CAB Reco...

Submission	Planning	Approval	Implementation(0/0)	Review	Close	History
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**CAB Recommendation**  
**Seek CAB recommendation**

☐

<input type="checkbox"/>	 <b>Recommended</b>	<b>Brett Skyler</b> E-mail : req2@sdpmssplnmail.com Sent on : Apr 20, 2015 03:40 PM <b>Recommended On</b> : Apr 20, 2015 03:41 PM <b>Comments</b> : This is a much needed change to our organisation. I hope it will increase our productivity.
<input type="checkbox"/>	 Recommended	<b>Gregory Roberto</b> E-mail : req5@sdpmssplnmail.com Sent on : Apr 20, 2015 03:40 PM <b>Recommended On</b> : Apr 20, 2015 03:44 PM <b>Comments</b> : Implementing the change, its a great news! But my only concern is, How are we going to make such a huge trar
<input type="checkbox"/>	 Recommended	<b>Hanna Macy</b> E-mail : req3@sdpmssplnmail.com Sent on : Apr 20, 2015 03:40 PM <b>Recommended On</b> : Apr 20, 2015 03:42 PM <b>Comments</b> : I understand that this transition will give us a huge leap in our productivity and profits.

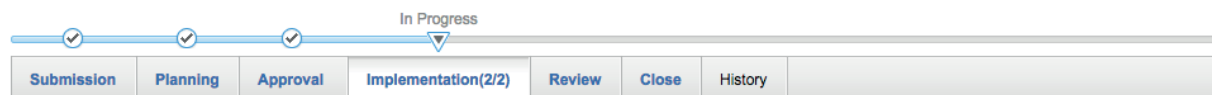
## STAGE 4 - IMPLEMENTATION:

### VIEW: IMPLEMENTER

**Install new, separate physical servers for Web application and the mail server.**

Requested by : **Avery Clayton**

Scheduled End Time : N/A



#### Associated Project

[Dissociate Project](#)

Title	Install new, separate physical servers for Web application and the mail server.		
Schedule End	-	Tasks	0 / 0
Projected On	-	Milestones	0 / 0

#### Task Details

Actions

+ Add New

Templates

Dependencies

Trigger

?

Row Count : 2

<input type="checkbox"/>	Title	Status	Owner
<input type="checkbox"/>	Set up a test server	Closed	Andy Dillon
<input type="checkbox"/>	Install the web application in the server	Closed	Elena Makkena

List of tasks involved in implementing the change

## STAGE 5 - REVIEW:

### VIEW: REVIEWER

In-Progress

Submission Planning Approval Implementation(10/10) **Review** Close History

**Review** Reviewer's observations are documented

It is a successful change. The implementation of this change has been carried out within the implementation window.

The change has not created any incidents so far.

All the processes are promptly followed and documented.

It's good to standardise the workflow followed.

Next Review Schedule: 2015-03-21 00 Hours 00 Minutes **Schedule next review**

**Save** **Cancel**

## STAGE 6 - CLOSE:

### VIEW: CHANGE OWNER

Waiting for Code

Submission Planning Approval Implementation(10/10) **Review** **Close** History

**Closure Code**

Code: --- Select Closure Code --- **Apply closure code**

Comments:

**Provide comments**

☐ Trigger asset scanning process

### VIEW: CHANGE MANAGER

**Complete the change** ☒ Complete ☐ Cancel

Status: Completed

Follow the steps above to identify and standardize the right processes to perform a major change in your organization.

## 2. Standard change

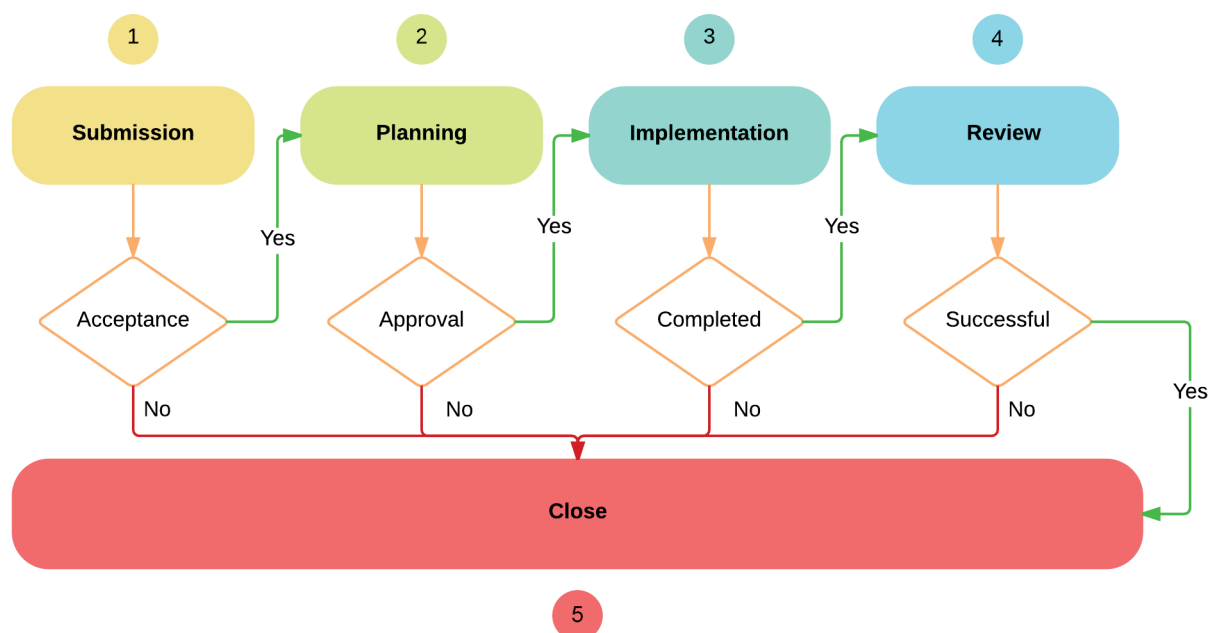
### 2.1 Scenario:

Assume that there are 20 LaserJet printers in your organization. Due to the frequent failure of the internal CPU and high maintenance costs, the management and the board members of the company have decided to replace all the LaserJet printers with LED printers. This will help the company lower maintenance costs and ensure quality prints. The management has pre-approved certain processes to implement this transition.

### 2.2 Prerequisites:

Categorize this change as a Standard Change, because it is pre-approved.

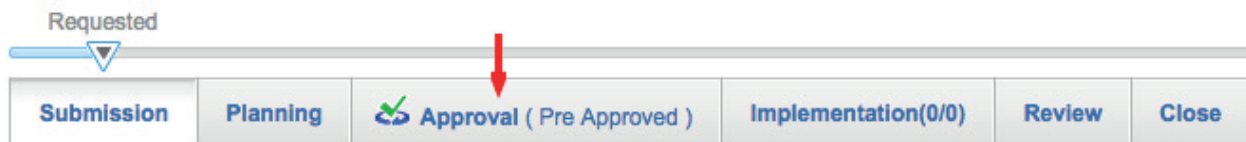
A standard change skips the approval stage. The following diagram gives you an idea of the stages for a standard change.



5 STAGES OF A STANDARD CHANGE LIFE-CYCLE

## Life cycle of a standard change in ServiceDesk Plus:

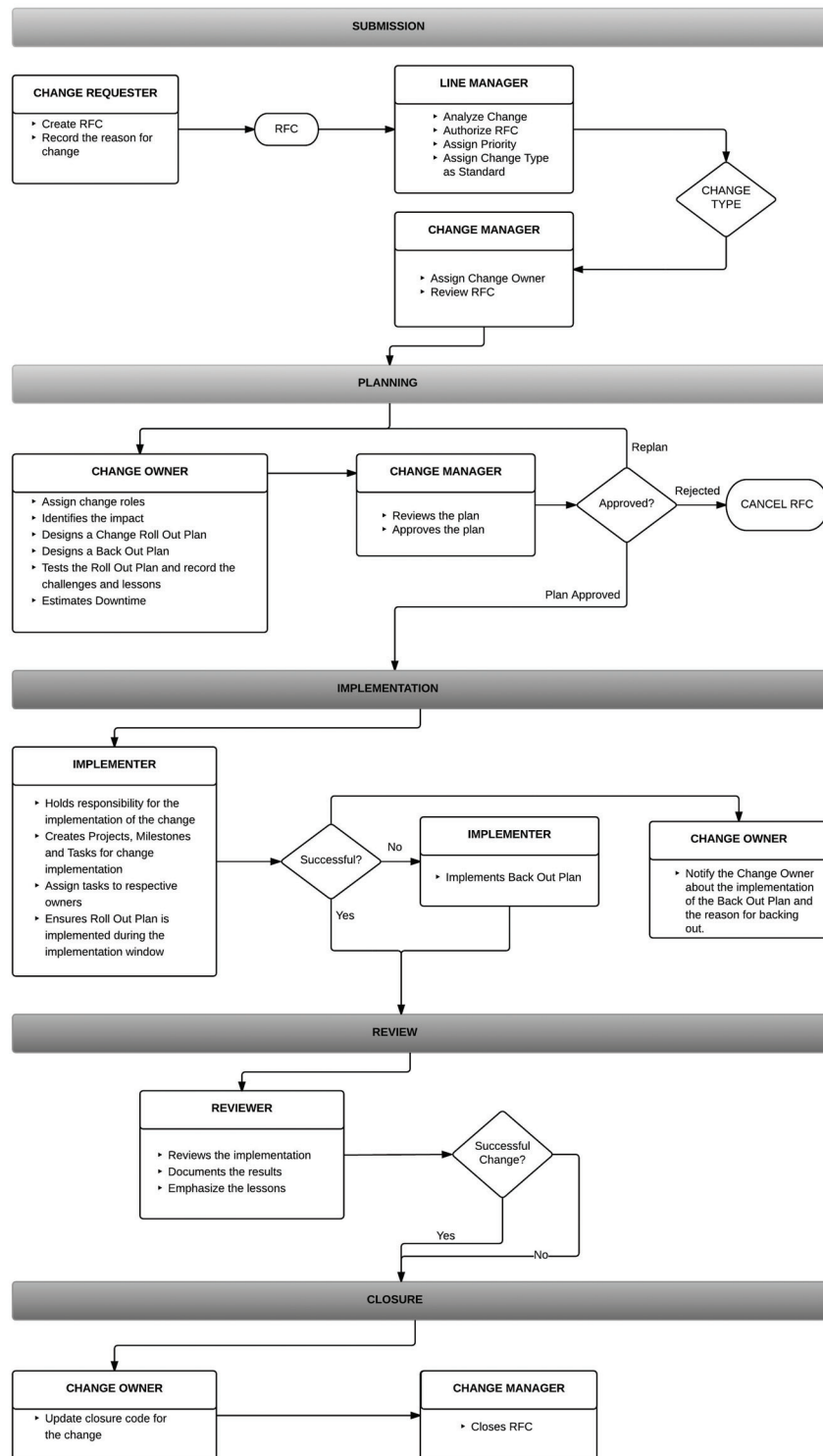
The following screenshot, from the ServiceDesk Plus application, depicts the stages involved in replacing your organization's printers.



**Note:** Standard changes are generally considered pre-approved. Therefore, they skip the approval stage and go directly into implementation after the planning stage.

### 2.3 Recommended processes:

Consider the following workflow diagram to learn the recommended processes involved in performing a standard change.



List the standard changes in your organization and create a workflow similar to the above mentioned workflow to save time for your technicians and CAB members.

### 3. Emergency change

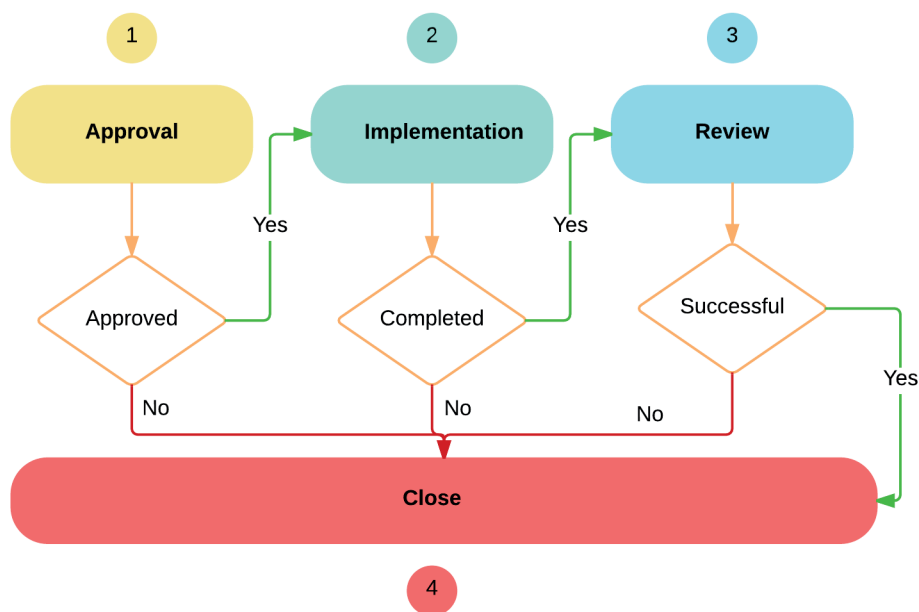
#### 3.1 Scenario:

Suppose your technicians are off to have a fun-filled weekend and you detect a data center security breach. Your security team has analyzed the issue and found that installing a patch on your data center would fix the issue. How would you handle this process, especially under a time constraint?

#### 3.2 Prerequisites:

Classify such changes as emergency changes and have an emergency workflow for them.


Emergency changes skip two stages: submission and planning. The following diagram will give you a fair idea of the life cycle for an emergency change.



4 STAGES OF A EMERGENCY CHANGE LIFE-CYCLE

## Life cycle of an emergency change in ServiceDesk Plus:

The below screenshot, from ServiceDesk Plus, depicts the stages that are involved in fixing the security breach in your data center.


**Security Breach in the Data Center**
Indicated by an alert icon

Requested by : **Heather Graham**  
 Scheduled End Time : N/A

**Stages skipped**
Approval Pending

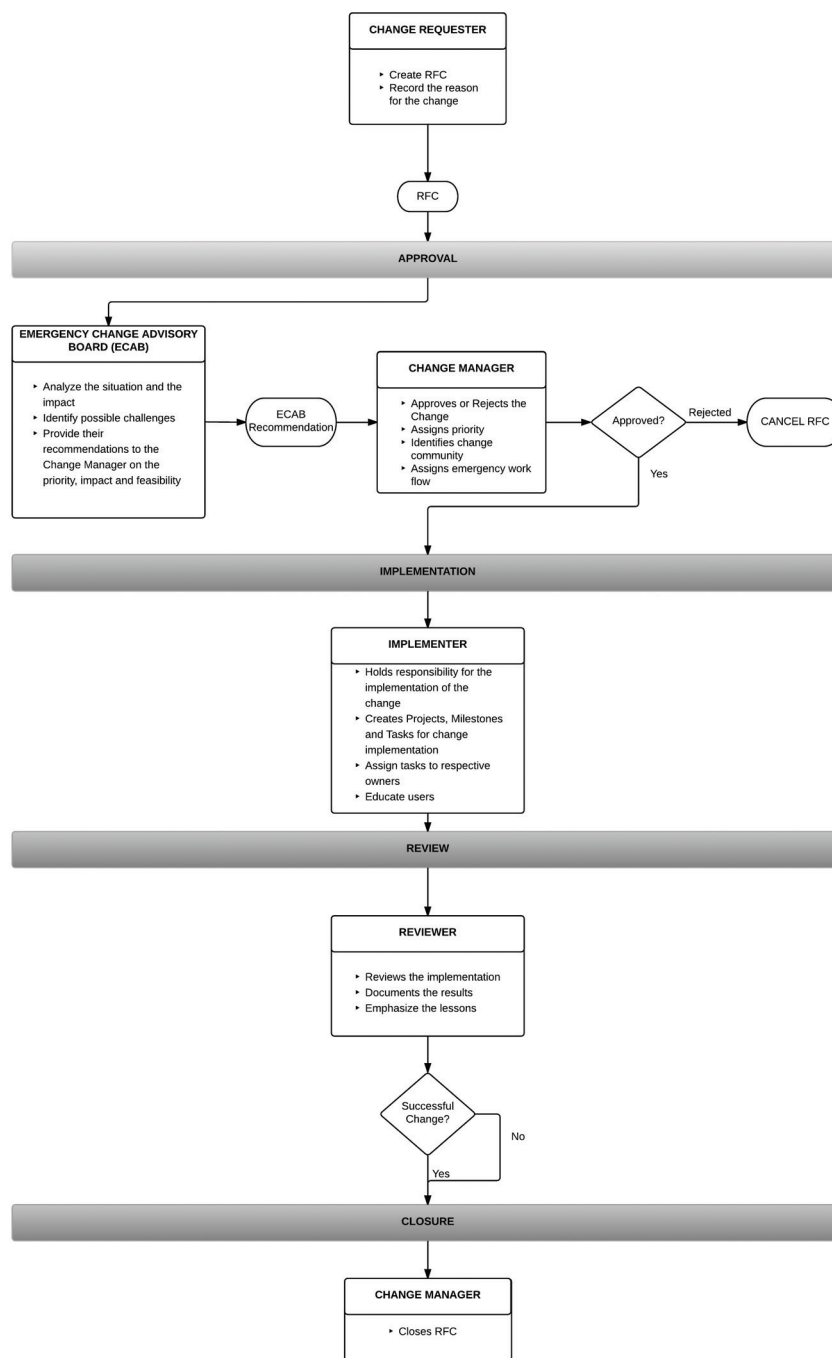
Submission	Planning	Approval	Implementation(0/0)	Review	Close
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**CAB Recommendation**

### 3.3 Recommended processes:

The following workflow will give you a fair idea of the processes involved in implementing the emergency change.





**Note:** Your organization is considered to have a healthy change management process if the number of standard changes is higher than the number of emergency changes.

We hope that we've given you a clear picture of the processes involved in change implementation. We'd be delighted if you would explore more on change management processes, play them out, and discover the best options for your organization.

For more details, email us at [support@servicedeskplus.com](mailto:support@servicedeskplus.com)