AS-IS analysis workshop for the process Infra Change Management

Date: 27.11.2020

List of the workshop participants

Solvay: Eric NUEZ; Teemar Ratanasirigulchai; Di MONTAGARD; Giovanni Giusti; Naveensrikantaiah; Claire FABRE; [elise.creniaut-ext@solvay.com](mailto:elise.creniaut-ext@solvay.com); Marie-pierre Deramond; JuLin Chuang; [hamza.salah-mars@magellan-consulting.eu](mailto:hamza.salah-mars@magellan-consulting.eu)

Infosys: Naveensrikantaiah, Venkat Deepak Katta, Vamsi Krishna Gunda, Mikhail Chepaykin, Kirthika Sethuraman, Akanksha Sharma, Srikanth Karapanahalli Srinivasrao, Patricia Capatina, Sergey Znamenskiy

The goal for the AS-IS analysis workshop: to understand the AS-IS implementation of the Change management process in Solvay, requirements and expectations for TO-BE process.

| **№** | **Topic** | **As-Is Process** | **Additional requirements** | **Objective** |
| --- | --- | --- | --- | --- |
| 1 | CM scope/Themes Identification | RemedyForce is used based on Release management process  Link: [Here](https://docs.google.com/document/d/1A5Mq5YcB5Ftg-9DH9KrLzbfEau1lBTwqiBBhrI3bsNA/edit)  Changes are reviewed weekly in OCC meeting and based on decision changes may move to CAB.  Infra changes eg: app set-up, new infra setup, global impact changes targeting a region.  Currently no KPI Matrix is followed. |  | Discuss and understand the goals and the scope for the CM process  CM deliverables:  1. Change mgmt definition, role/governance and KPI metric  2. Change mgmt process and themes finalization.  3. Standard Change mgmt SOP (standard operating procedures) design (e.g. categorization per service granularity and Change catalog)  [Technical Enabling] CMDB, Standard CM template, Chatbot/Operator usage to fulfil/resolve requests |
| 2 | Change - Form & Fields (Without Master Data) | RemedyForce CM RFC templates used: Named as Change Adhoc |  | Describing and understanding the RFC forms and fields used in the same. |
| 3 | Templates for CM | Templates are used for all changes in Remedy Force |  | Discuss templates for Change requests  AS IS and TO BE |
| 4 | Change Request Categorization and Classification | Change Priority:  Minor, Major & Emergency  Risk & Impact : High, Medium and Low |  | Discuss the categories and classifications needed for Change: types of changes to be implemented (AS-IS), TO BE |
| 5 | Change Request Prioritization | Change Priority:  Minor, Major & Emergency  Risk & Impact : High, Medium and Low  Prioritization is discussed during OCC meeting |  | Discuss the prioritization matrix, questionnaire list and Impact/Risk categorization matrix :AS-IS, TO BE |
| 6 | Conflict Detection | Manual conflict detection process is followed.  Discussed during OCC meeting, priority is for urgent changes with proper business justification by the request owner. |  | Discuss the ways of detecting conflicts(manual or automatic) and usage of blackout and maintenance schedules :AS-IS and TO BE |
| 7 | Blackout and Maintenance Schedules | Only emergency changes during maintenance window  Eg: Security and authorization changes |  | Discuss and finalise the approach for configuration and updating the Blackout and Maintenance Schedules/windows |
| 8 | Normal Change Workflow | Same approval process with followed with normal, Std, and emergency changes.  OCC to review first and decision on certain changes for further review in CAB.  OCC: Weekly meeting  Regular meeting: Bi-weekly |  | Discuss the approval levels and flow needed to be adapted for an Normal change process (includes conditions to be met for routing changes to relevant CAB groups): AS-IS and TO BE |
| 9 | CAB Definitions & Meetings Setup | All the change are reviewed in OCC first and discussed whether change further needs review in CAB or not. |  | Discuss and define the mechanism to create/update CAB definitions, meetings and setup. |
| 10 | Standard Change Workflow | Same approval process with followed with normal, Std, and emergency changes.  OCC to review first and decision on certain changes for further review in CAB.  OCC: Weekly meeting  Regular meeting: Bi-weekly |  | Discuss the approval levels and flow needed to be adapted for a Standard change/template creation process. As Std changes are pre-approved, identify and finalize the approving authority : AS-IS and TO BE. |
| 11 | Emergency Change Workflow | Same approval process with followed with normal, Std, and emergency changes.  OCC to review first and decision on certain changes for further review in CAB.  OCC: Weekly meeting  Regular meeting: Bi-weekly |  | Discuss the approval levels and flow needed to be adapted for an Emergency change process (includes conditions to be met for routing changes to relevant ECAB groups). |
| 12 | Change - Transversal | Manual linking of Incident and Problem tickets to change. | Automatic and dynamic mapping of tickets or every element or process linked by affected CI. | Review the form level integrations between PM, IM, KM and Change, CMDB processes. |
| 13 | Change - Lifecycle - Statuses - Workflow | Following status is currently used:   1. Registered: Draft mode. 2. Ready to be approved 3. To be submitted to IS-CAB 4. Opened 5. Pending 6. Closed |  | Discuss the CM lifecycle, statuses structure description, CM workflow diagrams (AS IS) |
| 14 | Change Notifications | Manual notifications are sent through Remedy force reports which is synced to Dashboard.  Currently notification is set to OCC and CAB consolidated in report(Weekly or Bi-weekly).  Requester responsible to send notification to other audience as per the communication plan. |  | Discuss the various notifications sent throughout the change(includes Normal, Standard and emergency) lifecycle. |
| 15 | Change Closure Code |  |  | Discuss and align on the closure codes needed for the change process. |
| 16 | Change management - Roles and Responsibilities |  |  | RACI for Change Management: AS IS, TO BE |
| 17 | CM process KPI used | NO KPI matrix is followed |  | List the KPI used for CM |
| 18 | CM – Reporting and Dashboards |  |  | Discuss and align on the Roles, dashboard views and reports AS IS and TO BE |
| 19 | Finalize Normal Change Process + Notifications |  |  | Align and finalize the normal change lifecycle along with notifications |
| 20 | Finalize Emergency Change Process + Notifications |  |  | Align and finalize the Emergency change lifecycle along with notifications |
| 21 | Finalize Standard Change Process + Notifications |  |  | Align and finalize the Standard change lifecycle along with notifications |

RACI AS-IS

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| № | Activity | Change Manager | Change Coordinator | Change Advisory Board(CAB) | Emergency Change Advisory Board(ECAB) | Change Owner | Change Requester/Initiator | Change Approver | Change Implementer |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

RACI TO-BE

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| № | Activity | Change Manager | Change Coordinator | Change Advisory Board(CAB) | Emergency Change Advisory Board(ECAB) | Change Owner | Change Requester/Initiator | Change Approver | Change Implementer |
| 1 | Requesting change | I | I |  |  | R/A | R |  |  |
| 2 | Change assessment | A | R |  |  |  | I | C/I |  |
| 3 | Classification/ prioritization of change | R/A | R | R |  |  | C/I |  |  |
| 4 | Plan and schedule Normal change | R/A | R | R |  | R | C/I | R | I |
| 5 | Plan and schedule Standard change | R/A | R |  |  | R | I |  | I |
| 6 | Plan and schedule Emergency change | R/A |  |  | R | R | C/I | R | I |
| 7 | Execute/implement normal/Standard change | A/C | R |  |  | I | I |  | R |
| 8 | Execute/implement Emergency change | A/C |  |  |  | I | I |  | R |
| 9 | Perform PIR | A/R | R |  |  | R | C/I |  | R |
| 10 | Notify requester of change results | A/C | R |  |  | R | I |  | R |
| 11 | Close change | R/A | R |  |  | R | C |  | R |

Change lifecycle example

Implement change

Review and close change

Approve and plan Change

Prioritization of change

Assess & evaluate change

Request for change