

CHANGE ADVISORY BOARD WORKFLOW FOR CHANGE MANAGEMENT

OVERVIEW

Designed and implemented a custom Jira-based Change Advisory Board (CAB) workflow to formalize change tracking, improve oversight, and streamline approvals—resulting in a scalable, documented process adopted across the organization.

PROBLEM STATEMENT

In early 2023, the organization lacked a formal Change Advisory Board (CAB) process. Weekly changes such as minor updates and even major deployments were handled inconsistently by team leads. There was no oversight, documentation, or standardized steps for approval. There were no deployment or rollback plans, and no centralized tracking system, which led to operational risk and inefficiencies.

PROPOSED SOLUTION

To address this issue, I proposed the creation of a custom CAB workflow within JIRA, along with the implementation of a structured change management process. The process included:

- 1. Collaborative Planning:** Partnered with a newly hired Process Improvement/CAB Lead Engineer to gather requirements. Drawing from our shared background, I recommended a CAB intake screen, which would require users to include deployment plans, rollback steps tested in lower environments, and documentation links before submitting for CAB review.
- 2. Workflow Design:** Designed a step-by-step JIRA workflow tailored to the CAB process, including custom statuses, transition steps, change types, and fields to ensure clarity and consistency.
- 3. Access Control & Automation:** Established role-based permissions for transitions and built automations to notify assignees, enforce field completion, support users with reminders, special notification will be sent the CAB stakeholders when an Emergency CAB ticket is submitted.
- 4. Testing & Feedback Loop:** Organized a pilot with CAB lead engineer and a product manager to test the workflow and incorporated iterative feedback for improvement.
- 5. Documentation & Training:** Worked with the CAB engineer to create end-user guides, technical documentation for administrators. The CAB lead scheduled and led all training because he is the owner of this program. I attended all training sessions to answer any technical related to the CAB workflow.
- 6. Launch & Optimization:** After management approval, I pushed the project to production with appropriate permissions, published resources to the knowledge base, and introduced dashboards and automated reporting features.

RESULTS

- A formal CAB process was established across the organization.
- Leadership gained visibility into all proposed changes.
- Pre-deployment validation and rollback planning became mandatory.
- CAB meetings became more efficient and data-driven.
- Emergency change handling was streamlined through automated notifications.