



# Identify the roles and responsibilities for your organization

6 minutes

Your technical director wants to understand what roles in the company are needed to make the “stay current” process a success. You’ve been asked to report back on which roles should be involved in the process and what they are responsible for.

## Who is involved in the stay current process?

To stay current, you’ll need to decide who does what by assigning a number of different roles. Each role comes with specific responsibilities and skills, and active during a particular phase of the process. The roles are as follows:

| Role                         | Responsibilities   | Skills   | Phases in scope               |
|------------------------------|--|--|-------------------------------|
| <i>Process manager</i>       | <ul style="list-style-type: none"> <li>- Manage the end-to-end process.</li> <li>- Ensure inputs and outputs are captured properly.</li> <li>- Ensure activities progress.</li> </ul>  | IT service management.   | Plan, Prepare, Deploy.        |
| <i>Application owner</i>     | <ul style="list-style-type: none"> <li>- Define application test plan.</li> <li>- Assign user acceptance testers to test application based on the test plan.</li> <li>- Certify that the application can be used.</li> </ul>     | Knowledge of critical and important applications.  | Plan, Prepare, Deploy (Pilot) |
| <i>Application developer</i> | Ensure apps are developed to be compatible with the latest versions of Windows.  | <ul style="list-style-type: none"> <li>-Application development.</li> <li>-Application remediation.</li> </ul>   | Plan, Prepare.                |
| <i>End-user computing</i>    | <p>This is a group, and can include multiple roles like infrastructure engineer, or deployment engineer. An infrastructure engineer would, for example, ensure upgrade tools are compatible with the new version of Windows.</p> | <ul style="list-style-type: none"> <li>-Bare metal deployment.</li> <li>- Infrastructure management</li> <li>- Application delivery.</li> <li>- Patch management.</li> </ul> | Plan, Prepare, Deploy.        |

| Role                | Responsibilities   | Skills  | Phases in scope  |
|---------------------|--|---|------------------|
| <i>Operations</i>   | Ensure support is ready and available for the Windows version. Provide post-deployment support procedures like user communication and plans for rollbacks.   | Troubleshooting apps and systems.                     | Prepare, Deploy. |
| <i>Security</i>     | Review and approve the security baseline and the security tools.   | Platform security.                                    | Prepare, Deploy. |
| <i>Stakeholders</i> | <p>The stakeholders represent the groups that will be impacted by the update process. These can include:</p> <ul style="list-style-type: none"> <li>- Head of Finance</li> <li>- Head of end-user services</li> <li>- Head of change management</li> </ul> | Key decision maker for a business unit or department. | Plan, Deploy.    |

## Who should lead the stay current process?

We recommend that Woodgrove identify a process manager. The process manager will oversee the tasks undertaken by everyone else during the process. Each phase in the process has a number of tasks that will be carried out by different roles across the different workstreams.

The process manager leads the process and has the authority to keep pushing the process forward. The process manager is also informed of the outcome of the different work that is carried out during process. Here is list of some of the tasks that the process manager should be responsible for engaging teams to start the process, and be kept informed of under the different workstreams:

| Compatibility                  | Deployment   | Capability and modernization       |
|--------------------------------|--|------------------------------------|
| Assigning application priority | Reviewing infrastructure requirements for new products | Determining infrastructure changes |
| Application assessment         | Validating current infrastructure against requirements | Determining configuration changes  |
| Device assessment              | Defining infrastructure update plan                    | Creating capability proposal       |

The process manager also carries out tasks like:

- Collecting remediation outcome reports
- Escalating failures
- Determining whether the environment is ready for Pilot deployment at the end of the Prepare phase, and then Broad deployment after Pilot deployment

If the process manager role can't be assigned for some reason, for example because of resource constraints, then the role should be owned by your IT or end-user computing group.

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## Next unit: Plan for application functionality and compatibility

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