**CM Roadmap**

**Major Milestones:**

1. Managers to create a list of all Standard Changes by 5/31/14. All Standard Changes identified after this date will need to go to the OIT CAB for review.
2. Complete drafting Standard Change workflows before procurement of the new ITSM tool.
3. Create one OIT Change Calendar. Each manager will invite the OIT Change Calendar to their departmental calendar when scheduling and documenting Changes.
4. Modify the Activity / Outage form at <http://alaska.edu/oit/activities/submitActivity.xml> to include a new field stating whether the notice is DRAFT, PRE-CAB, POST-CAB, or DISTRIBUTED. Forms will be adjusted as they go to the CAB.
   1. When the form is filled out, the calendar invite will be created. The calendar invite will include the link to the activity/outage notice.
   2. The subject line in the OIT Calendar Invite will have the use of code words (1. Outage 2. Activity 3. Emergency Activity 4. Emergency Outage) with a (colon:) and then the status (Completed, update, canceled) ex- Outage: Completed
5. Hold the first OIT CAB Meeting on April 16th, 2014 at 10:30am.
6. Conduct OIT CAB meetings on a continual weekly basis and at all remaining workshops.
7. Final list of all Standard Changes targeted for 5/31/14. Standard Changes identified after this date will require OIT CAB review.
8. Create a workflow (package) for a complex Standard Change that flows through multiple departments- Building a File Server- DDS, WSA, NO, SO, SC, Data Center Ops, NE.
9. Identify date when Standard Change packages will need to be entered into the new ITSM tool.
10. Agree on Service Catalog categories, necessary to configure services in the new ITSM tool.
11. Develop implementation plan for the new ITSM tool.
12. Go-live with Incident Management in the new ITSM tool before going live with Change Management.
13. Execute departmental Change Management Training Plans to coincide with OIT wide training on the new ITSM tool.
14. Execute Communication Plan for targeted audiences.
15. Turn finalized Change Management document into a Smart Document, posted to the ITSM Program website and distributed throughout OIT.

**Homework To Be Completed After January’s Workshop:**

1. Kevin to define External Review in Key Terms and Definitions. The team can provide comment and feedback.
2. Update Standard Change Checklist to include the 3 conditions identifying a Standard Change and departmental examples of Standard Changes
3. Managers to create a departmental sub-folder to house all Change Management documentation within the shared folder titled Departmental Change Documentation.
4. Continue drafting Standard Change workflows and all associated documentation (packages). All Standard Change packages to be assembled by 5/31/14.
5. Managers to provide Kevin 3 Standard Change packages to be reviewed at March’s “mock” CAB meeting.
6. Create a list of all Changes processed in each department during the month of February and March so that we can see how they fit into our definitions for Minor and Normal Changes.
7. Kenny to produce a list of Changes currently processed through HPSM.
8. Kenny to review the Managers Google Group to ensure membership is accurate. This Google Group will be added to all activity and outage notices.
9. Create calendars for each service area. Bill to send info to the team about the next steps needed to “mash up” all calendars into a view much like UAF events and begin using the Change Calendar for the upcoming “mock” OIT CAB meeting on 3/26/14.
10. ITSM Core Team to provide James Gentry with support in creating his initial Standard Change packages. Initial meeting to be set up after the Pink conference is over.

**Workshop Dates of 2/26/14- 2/28/14**

**Workshop:**

Rescheduled for June

**Workshop Dates of 3/26/14- 3/28/14**

**Workshop:**

1. Review list of changes processed by departments in February & March- Does volume affect the criteria for a Normal Change?

a. Department:, Standard: #, Normal: #, Emergency: #

2. Review Change Calendar(s)-

a. Level of detail for calendar entries

b. Calendars by service, department, Service Catalog Categories (14 currently) or a mixture?

c. Add reference to service index in the catalog?

d. If multiple departments are supporting the same change, will each department have an entry?

e. Additional code words: Add titles such as Bump (bounce, quick restart) or Black-out dates (registration, start of semester)?

f. Single Calendar for all? One calendar with all scheduled maintenance windows, semester start/end and the standard network freeze window

g. Which scheduled outages need to be on the calendar? Recurring back-ups or patches?

3. Hold Mock OIT CAB meeting

a. Review 1-3 Standard Change “Packages” from each department

b. Discuss when we should review Standard Changes needed to map a printer

c. Process Discussion- CITO Staff to review the Change Calendar. When do we start meeting weekly for CAB meetings? Cut-off date for including Standard Changes without OIT CAB approval?

d. Services changing ownership- requires new Standard Change approval from CAB?

4. Update OIT\_Normal\_Change\_Explained Document

a. Update Change Management process document

b. Determine what type of documentation departments will need to provide when bringing Normal Changes to the CAB.

**Homework To Be Completed After March’s Workshop:**

1) Modify the Activity / Outage form at <http://alaska.edu/oit/activities/submitActivity.xml> to include a new field stating whether the notice is DRAFT, PRE-CAB, POST-CAB, or DISTRIBUTED. Forms will be adjusted as they go to the CAB.

a. When the form is filled out, the calendar invite will be created. The calendar invite will include the link to the activity/outage notice.

b. The subject line in the OIT Calendar Invite will have the use of code words (1. Outage 2. Activity 3. Emergency Activity 4. Emergency Outage) with a (colon:) and then the status (Completed, update, canceled) ex- Outage: Completed

c. Managers to start using the new process involving the new OIT Change calendar and revised Activity / Outage form for all Normal Changes.

2) Continue drafting list of Standard Changes. Final list containing all departmental Standard Changes to be completed by 5/31/14. All Standard Changes added to the list after 5/31/14 require OIT CAB review.

3) Adjust all documentation to reflect the decision to categorize all Major/Minor Changes as Normal Changes.

4) Hold OIT CAB meetings every Wednesday at 10:30am

**Workshop Dates of 4/28/14- 4/30/14**

**Monday morning (Service Catalog)-** Discuss Service Catalog as it relates to Change Management (current process, key terminology, how the Service Catalog relates to their services and the Incident/Change processes, 1. Define business functions/processes, 2. Define IT Services 3. Define IT Systems 4. Define IT components).

**Monday afternoon (Incident Management)-** Incident Management as it relates to Change Management- 1. Review the process documentation, 2. Explain the pieces that will be in place before procurement of the new ITSM tool, 3. Incident to be the first process implemented in the new tool (retire HPSM asap), 4. Identify a high level workable implementation plan for transitioning departments to using the new tool, 5. Importance of categories and service names in the new ITSM tool

**Tuesday morning (New ITSM Tool)-** In-depth discussion of developing an implementation plan for the new ITSM tool, milestones, communication plan, training plan, roll-out plan (do we group departments together?), any additional questions surrounding implementation of the new tool, *possible demo from vendors*

**Tuesday afternoon-** Review all workflows (package) for a complex Standard Change that flows through multiple departments- Building a File Server- DDS, WSA, NO, SO, SC, Data Center Ops, NE.

**Wednesday morning-** Hold OIT CAB meeting followed up with reflection / process improvement / lessons learned from the OIT CAB meeting.

**Wednesday afternoon-** Agenda building workshop

**Homework To Be Completed After the April Workshop:**

1) Finalize CM Process document and turn into “Smart Document.”

2) Post finalized CM document to the ITSM Program website to allow OIT to become familiar with the new process.

3) Begin execution of Communication Matrix targeting specific audiences.

**Workshop Dates of 5/28/14- 5/30/14**

**Workshop:**

1) Collect final list of Standard Changes by department. Confirm final date of 5/31/14 to add to list.

2) Touch base with Managers to see if they require assistance with training their staff on the new CM processes.

3) Discuss OIT wide training for the new ITSM tool.

**Homework :**

1) Develop training plans for the new tool or specific departments, if necessary.

2) Continue executing comm plans for targeted audiences.

**Workshop Dates of 6/24/14- 6/26/14**

**Workshop:**

1) TBD

**Homework:**

1) TBD