



# 4 Steps To Managing IT Change

## Introduction—The Digital Enterprise And Role Of AI

The business world is evolving faster than ever. New technologies, services, and tools are disrupting and transforming workflows, processes, job roles, and organizational structures. Post-COVID, companies are dealing with different work models and the new level of support that comes with it. Advanced technologies such as artificial intelligence and machine learning are reshaping the way business is conducted. Change is one of the only constants. The Harvard Business Review reports that about three-fourths of change efforts fail, by not delivering the anticipated results or are stopped altogether. To avoid failure, organizations looking to effectively manage change are more likely to be successful through systematic and planned strategic initiatives and utilizing the formal process of Change Management.

### What is Change Management?

Change management most commonly refers to the methodologies used to implement change as it relates to people, processes, and culture. Due to the drastic changes caused by technology, much of organizational change is motivated by adapting to technological forces that are reshaping business.

*“...to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes to control IT infrastructure, in order to minimize the number and impact of any related incidents upon service.”*

IT change management is a discipline within Change Management that focuses on leveraging technology to implement identified changes. It is particularly helpful to IT leaders who need a systematic approach to large change projects. ITIL (Information Technology Infrastructure Library) refers to IT change management as the process within the Service Transition stage responsible for controlling the lifecycle of all changes and is outlined below when applied to IT Service Management (ITSM).

## Best Practices for ITIL

Change Management Change can be complex. When adopting ITIL change management approaches in an organization, there are a series of best practices that can help an organization make any change-oriented transition smoother and more successful. The following are four steps to implementing successful ITIL change management, pulled from established best practices for change management.

# 1 Implementing The Change Management Process



## Identify the Need for Change

Understanding that an organization needs to change is the first step of change management. While it may sound simple, properly identifying the precise areas where change needs to happen can be challenging. Dr. John P. Kotter, a professor at the Harvard Business School, suggests a first step as “Establish a Sense of Urgency” in his 8-Step Process for Leading Change. Kotter suggests ensuring everyone involved understands the impact the change brings by communicating a “bold, aspirational opportunity statement” that communicates the importance of immediate action.

## Creating a Request for Change

Creating a specific document that outlines specific change requests can be a guiding resource for all those involved in change. It should outline specifics on what should be changed, how change should be implemented, and why.

## Prepare and Plan for Change

Change can be challenging, so preparing for it can help alleviate the inevitable challenges. With a change plan in place, involved people can understand the course of change, resources used to complete the change, and a timeline.

## Testing Change

It's important to make tests before implementing change. It could be as simple as testing new software or practicing new procedures on a small scale, before any large deployment.

## Creating a Change Proposal

The final step before implementing a change is drafting a change proposal, which should communicate how the change management approach will be the change vision. It should list priorities for the steps that will follow and predict outcomes. It can also list out results from the tests conducted and list the overall change plan. Implementing Changes If the planning is done carefully, with the steps built into the planning process, implementing the change shouldn't be challenging or full of surprises.

## Reviewing Change Performance

After changes have been made, reviews are important to see if expected goals were achieved and if processes achieve the desired results. For an IT professional, metrics and analytics tied to a technology involved in change management can help provide insight. Closing the Process Once the planned process of change is completed, it's important to document the entire process—including the roadblocks along the way—so that knowledge can be built.

*“As end users seek information from a self-service portal, their level of satisfaction is typically tied to how fast they can retrieve the information they seek.”*

# 2 Assign Change Management Team Roles



During the change process, it's important to assign roles to drive the change process, including:

### Change Initiator

The change initiator identifies the need for change and understands the methods and tools needed to implement change. This role is often well suited to people who work with customer support services.

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## Change Coordinator

The change coordinator helps to manage requests for change from incident management, problem management, release management and/or continuity management. This person should note the requests for change from other people involved in the process and calculate the risk and impact for requested changes. Also, he/she should prepare implementation plans by creating tasks and monitoring change progress.

## Change Manager

The change manager is especially useful—and most likely only needed for— change management for mid-sized and larger organizations. If there is an IT department of a larger company, it can be helpful to have multiple people performing change manager roles. The change managers should focus on numerous things: change procedures, receiving and prioritizing change requests, evaluating the risk level associated with requests and keeping detailed records of the change results.

## Approver

The approver makes decisions regarding approval or rejection of the change processes.

## Change Implementation Team

The change implementation team should consist of people who implement change. This team should include IT managers, especially when change is technologically based.

# 3 Reviewing and Assessing The Change Request



It can be useful to establish a Change Approval Board that reviews and approves requested changes and helps assess and prioritize changes. This team should be carefully selected to ensure requested changes are checked and assessed from both a technical and business perspective. The team is usually made up of IT representatives that include: the change manager, user managers and groups, technical experts and even third-party members (if required). This team should establish a method of review where requests are evaluated based on practicality and priority. The reviewer(s) should identify if the change request is reasonable and provide necessary feedback.

# 4 Managing Expectations on Both Sides of the Change Request



IT leaders need to balance the demands of the business and manage the IT infrastructure. When it comes to ITIL change management, there are typically two expectations: The services should be stable, reliable, and predictable. They should change rapidly to meet evolving business requirements. To help manage these, the following steps should be taken: Assure all proposed changes are evaluated for their benefits and risks. Further, it is important that all impacts are considered. Prioritize changes so that resources are allocated to changes that produce the greatest benefit based on the business need. Require that changes are tested, and each deployment includes a plan that can restore previous states if a deployment fails. Ensure that the configuration management system is updated to reflect the effect of any changes.

## Summary

In today's environment, businesses must learn to adapt and change. As business needs become more fluid, IT leaders need to respond to the challenge with a technology architecture that supports business growth. Prioritizing what gets changed by understanding of the catalyst for transformation, having an underlying desire for the organization to change, and possessing leadership capabilities needed to see it through are essential to successful change management. By successfully implementing a change management process that follows a set of guidelines and principles, you can effectively respond to the new business requirements. In summary, here are the 4 steps to successful change management:

- Implement The Change Management Process
- Assign Change Management Team Roles
- Reviewing and Assessing The Change Request
- Managing Expectations on Both Sides of the Change Request

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