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## *ITIL Change Management: Beginning with the End in Mind*

*Vance F. Brown*

*“As IT performance is increasingly measured based on alignment with the business and the delivery of quantifiable business value, many IT organizations are focusing their initial ITIL efforts and investments on change management.”*

*Brian Johnson, “Change Management: A Better Starting Point for ITIL”  
Mr. Johnson has authored more than 15 books on ITIL or related topics.*

*“Begin with the end in mind”* is the often-quoted *second habit* made famous in Stephen Covey’s best seller, *“7 Habits of Highly Effective People.”* In other words, Mr. Covey recommends having a clear understanding of the destination before beginning any journey. Accordingly, what is the most important “destination” to consider when applied to evaluating the automation and implementation of Help Desk / Service Desk activities?

To answer that question through the lens of a CEO or CIO, one has to ask the question: *“What element or activity of Service Support has the most potential impact to a company’s quantifiable “end goal” of financial profitability and business value?”*

*The answer: Change Management.*

*“What activity of Service Support has the most potential to impact a company’s “end goal” of financial profitability?”*

*Answer: Change Management”*

Incident Management typically is about dealing with a problem after it already has negatively affected an organization – i.e. putting out the fires! Why not focus on proactive problem elimination – i.e. preventing the issues and problems before they occur? Also, why not focus on continual improvement and positive change? ITIL defines the Change Management goal as follows:

*The process of controlling changes to the infrastructure, or any aspect of IT services, in a controlled manner, thus enabling approved changes to be implemented with minimum disruption.*

In other words, the Service Desk should be about the business of fixing problems and implementing IT infrastructure improvements without introducing additional problems – which have the potential of being “heart-stopping” to an organization and having devastating financial impact. According to ITIL, any changes related to hardware, communications equipment and software, system software, and live system documentation should go through the Change Management process.

Granted, the framework of ITIL’s Service Support works less like a prioritized linear hierarchy and more like a circle, where all the components of Change Management, Incident Management, Problem Management, Configuration Management, and Release Management are seamlessly intertwined. None of these components should be ignored or evaluated on a stand-alone basis. All have value, and they have the greatest value - or synergy - when all are properly implemented and automated together in an IT organization. The core roles of Incident, Problem, and Configuration Management are to provide evidence and data to an organization about what needs to be fixed, improved, or “changed” in the organization. Release Management is a logical extension of how to schedule and implement certain types of changes. Notice how Change Management is at the



heart of this ITIL universe. Continual improvement is the practical end goal for every company, because it has the greatest economic impact. It is fair to say that, within the ITIL Service Delivery framework, Change Management has the greatest impact to the financial bottom line of an organization and to the Return on Investment (ROI) of an IT software purchase. It therefore is ironic that the component that undoubtedly is the most important from a CEO/CIO company perspective is often the one that accompanies the common statement from a prospective IT software consumer, "...Oh, we don't need that right now!" Our company's response: "Oh yes you do!"

Companies are not static – they are about change. And the companies that change most efficiently and proactively, responding best to the demands of the customer, are the winners. The Service Desk is the catalyst for change for the IT infrastructure. They are change agents – change is what they do! So why is it that many organizations, when shopping for IT Service Desk or Help Desk software solutions, focus mostly on Incident Management? This is not meant to minimize the importance of Incident Management, but given the relative business value, it is unfortunate that many organizations do not require, and sometimes do not even consider, seamlessly integrated Change Management. It is negligent – or possibly just naïve – when many software vendors separate “the heart” out of Service Support and imply that Change Management is not needed or necessary. This is analogous to saying that the body does not need a circulatory system – or is something that you can tack on later. And just like a bad heart can quickly kill the body, poor change management can quickly bring an entire company to a standstill.

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Remember, failed changes can have the impact of stopping the heartbeat of the entire organization – having significant impact to the company's financial bottom line. And this is not just for the “big” changes, because a lot of “little” changes are just as important (or devastating) in the aggregate. Here is a quick test for whether or not your organization needs Change Management:

- Does your IT department configure and install new workstations when a new employee comes on board? Of course it does! *So you need Change Management.*
- Does your IT department have a process for approving the purchase of a new computer? Of course it does! *So you need Change Management.*

This is a “no-brainer” quiz! You already are doing Change Management tasks every day in your organization – so why not record, automate, and properly manage all the associated activities? Why not record and evaluate what processes work the best when changes are made, so that there is continual improvement in the Change process? It

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probably is because most IT software systems do not make implementing your Change Management processes easy. It is because they were not originally designed with ITIL in mind. You may have the false assumption that integrated Change Management always is more

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expensive. That is *not* the case with *all* software systems. Some companies believe that all healthy bodies should have a working heart, so they don’t try to pull it out! But in today’s IT software environment, with so many aging legacy systems, implementing Change Management feels complicated, overwhelming, and very expensive to add. Change Management therefore gets pushed aside as “...something we don’t need right now.”

“Yes you do!” You just need to find a system that was originally designed with Change Management in mind, and that makes Change Management easy. If you do, your organization will be shocked by the Return on Investment that Change Management will have on your purchase of an ITIL-compliant Service Desk software solution. But in order to be “easy,” Change Management must be seamlessly integrated into the other aspects of the Service Desk.

For example, you should be able to quickly evaluate all the incidents that are associated with a given problem. That is the best way to measure the impact of problems or issues in the organization and to evaluate the negative impact the problem is having on the organization. This is vital data to do a cost-benefit analysis regarding what problems need to be fixed and taken through the change approval process.

Once it is decided via an approval process to make a Change, if the end-user does not give feedback, it is difficult to measure the success or failure of a Change. And end-users (and even the help desk staff) typically will not log issues or incidents with Changes unless it is quick and easy to do. Accordingly, from the Self Service module, the end-user should be able to see all the Changes that could be of impact. And, if the change negatively impacts the end-user, with a “click of the button” the system should automatically be able to create an incident from the end user that is automatically attached to the associated Change record. You then should be able to immediately see all the incidents that are associated with a given approved Change implementation. That is the only way to effectively measure and evaluate the success or failure of a Change and to then make continual improvements to the change process.

Speaking of the “easy” requirement, there also needs to be an automated way to set up the approval process by the category and priority of the Change Request. Some changes can be approved by the Service Desk manager (or sometimes the “Change Manager”); others may have to be approved by the Change Advisory Board (CAB). You already have these approval processes in your organization – even if you

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don't yet use this ITIL terminology – but *your* approval processes need to be automated! ITIL does not dictate how you prioritize or approve your Change Requests. Your software system should allow you to incorporate and configure your business best practices. Otherwise, you will never use it. *Bottom line:* You have change approval processes in your organization, and these approval processes should be easy to administer with integrated Change Management software.

Incident matching to the approved Change Request, and being able to properly audit the approval process for Change, is critical for the purpose of making continual process improvements to a given type of Change. With continual Change measurement and related Change improvement, organizations can implement needed components to the IT infrastructure without causing a heart attack!

## Summary

The Service Desk is a change catalyst. Its job is about change! Change Management is more than an after-thought, it is the *end goal*: to implement improvements to the IT infrastructure – efficiently and effectively – with minimal or no disruption. The greatest ROI an organization can have with the automation and implementation of an effective Help Desk or Service Desk solution is in the area of Change Management. So this should be a high priority – not just an add-on!



**Vance F. Brown** has been involved in the IT Service industry for over 10 years. From 1996 - 2000, Vance was President and CEO of *GoldMine Software Corporation* (formerly Bendata, Inc. and currently FrontRange Solutions - the makers of *HEAT* and *ITSM* Service Desk solutions, and *GoldMine* contact manager). Under Vance's leadership, the *HEAT* product went from a rating by the Gartner Group as a "niche" player to the "market leader" in both "ability to execute" and "vision." Vance currently is CEO of Cherwell Software, the developer of Cherwell Service Desk ([www.CherwellSoftware.com](http://www.CherwellSoftware.com)). Vance graduated from *Wake Forest University*, *summa cum laude*, with degrees in Economics and Computer Science. He graduated from law school, *with honors*, from the *University of North Carolina*, finishing as a member of the Order of the Coif and the Law Review. Vance would love to get your feedback about this article at [Vance.Brown@CherwellSoftware.com](mailto:Vance.Brown@CherwellSoftware.com).