

IT Services Management Service Brief

Release Management

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Introduction

A primary focus of IT Service Management (ITSM) is the application of IT best practices (founded in ITIL) to enable IT to be a more effective service provider across the enterprise to satisfy the organization's business requirements.

Although managing the IT infrastructure itself is a necessary component of most ITSM solutions, it is not the primary focus. Instead ITSM addresses the need to align the delivery of IT services closely with the needs of the business. This involves a transformation of the traditional *Business - IT paradigm* into one that is process-oriented, proactive, and enterprise wide. This service provider paradigm encompasses IT best practices using the perspectives of people, process, technology, organization, and integration.

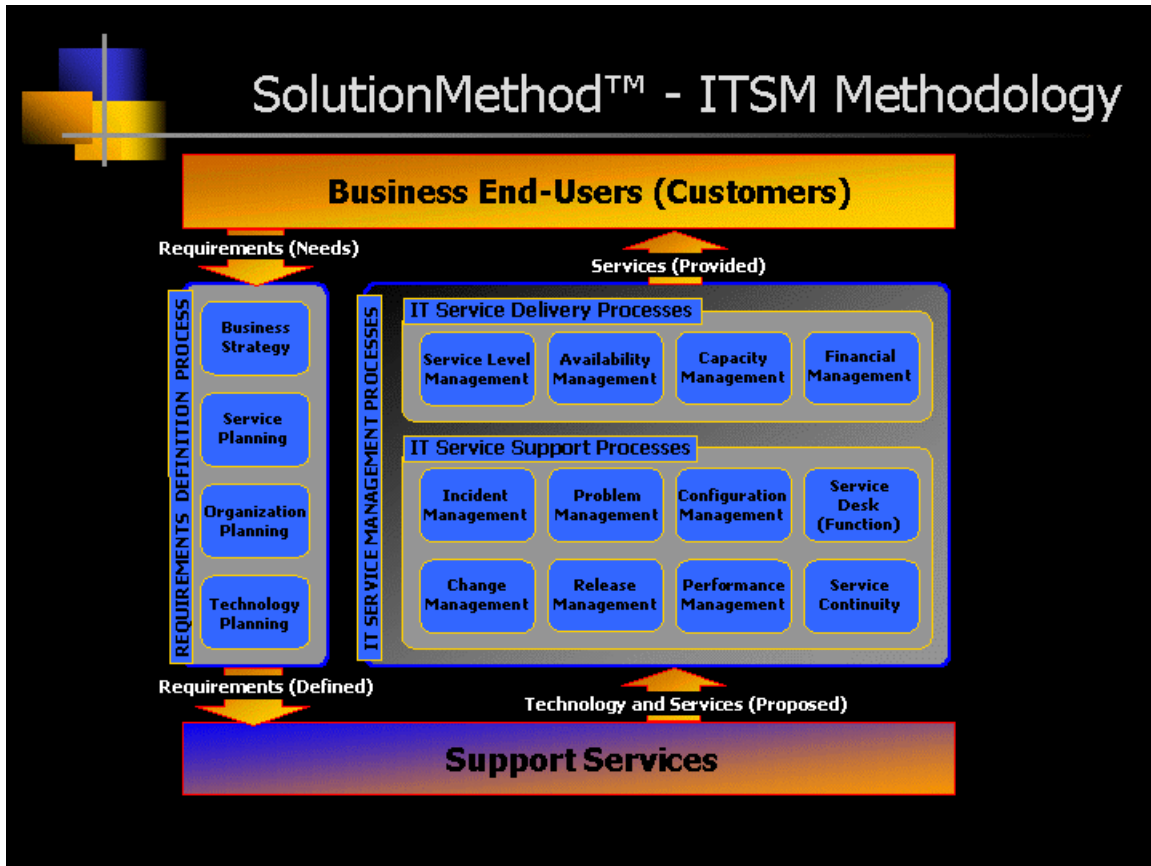
Within this ITSM service provider paradigm there are several focus areas such as business objectives, service level objectives, and technology infrastructure that along with other areas play critical roles in the ITSM methods and best practices.

Release Management is the testing, verification, and release of changes to the IT environment. It is assumed that these changes have already been processed and approved by the Change Management process. Release Management is part of the **SolutionMethod™** IT Service Support Processes.

SolutionMethod™ - A Roadmap to ITSM

SolutionMethod™ describes a service methodology framework for ITSM that is based on ITIL best practices. The focus of **SolutionMethod™** is to enable service, its delivery and management. It is an iterative methodology that has multiple entry points but most typically begins with business end-users/Customer requirements and concludes with a qualification and quantification of services provided to satisfy those requirements both tactically and strategically.

This evolutionary approach enables organizations the ability to adaptively integrate best practices based on their specific maturity level and priorities. **SolutionMethod™** employs a phased approach to ITSM that consists of assessment, architecture and design, planning, implementation, and support. With each phase 5 perspectives of people, process, technology, organization, and integration are evaluated.



The high level goal for ITSM *structure* encompasses the following:

- 1) Determine the current, existing IT infrastructure, processes, and services
- 2) Develop a desired future state of IT and the services it needs to provide
- 3) Architect a "roadmap" that depicts how to get to the desired state from the current state
- 4) Determine the steps needed to execute the "roadmap"

The **SolutionMethod™** ITSM *framework* for each of the ITIL Service Delivery and Service Management areas is a 5 phase model:

- **Assessment** - determine the current state and begin to collect and understand the metrics for the future desired state
- **Architect and Design** - develop a mature design for the future state
- **Planning** - develop those plans necessary to achieve the future desired state in a phased evolutionary fashion
- **Implementation** - implement and deploy the plans within IT and across the enterprise to achieve the future desired state
- **Support** - manage, maintain, and improve the future desired state being able to adaptively integrate enhancements as needed or required

Within this *framework*, **SolutionMethod™** effectively enables managing IT, as an enterprise wide, service oriented entity comprised of 5 separate and distinct *perspectives*:

- **People** - quantity and quality of expertise and knowledge
- **Process** - IT and organization specific practices, procedures, guidelines, etc. and the level of complexity and sophistication of them
- **Technology** - total logical and physical technology infrastructure that consists of hardware, software, communication networks, applications, DBMS, etc.
- **Organization** - internal and external business factors that affect IT, how IT and the organization interface, what is the organizations "corporate culture", what are the organization's direction and how does that affect IT
- **Integration** - how is IT integrated within the business model, what services does IT provide, how are the services provided, and how are best practices employed within IT

Scope and Objectives

The overall goal of this service is to assess and plan for tactical and strategic technology infrastructure in the ITSM release management areas within the 5 perspectives.

The specific service goal is to provide detailed procedures and recommendations that would enable the customer to implement a strategy of releasing changes into the IT infrastructure. These releases would have been processed and approved by the Change Management process, including the completion of planned maintenance in periodic releases and unplanned maintenance requests for both vendor and customer. This will reduce the total effort required for maintenance and minimize outages and ensure availability and service.

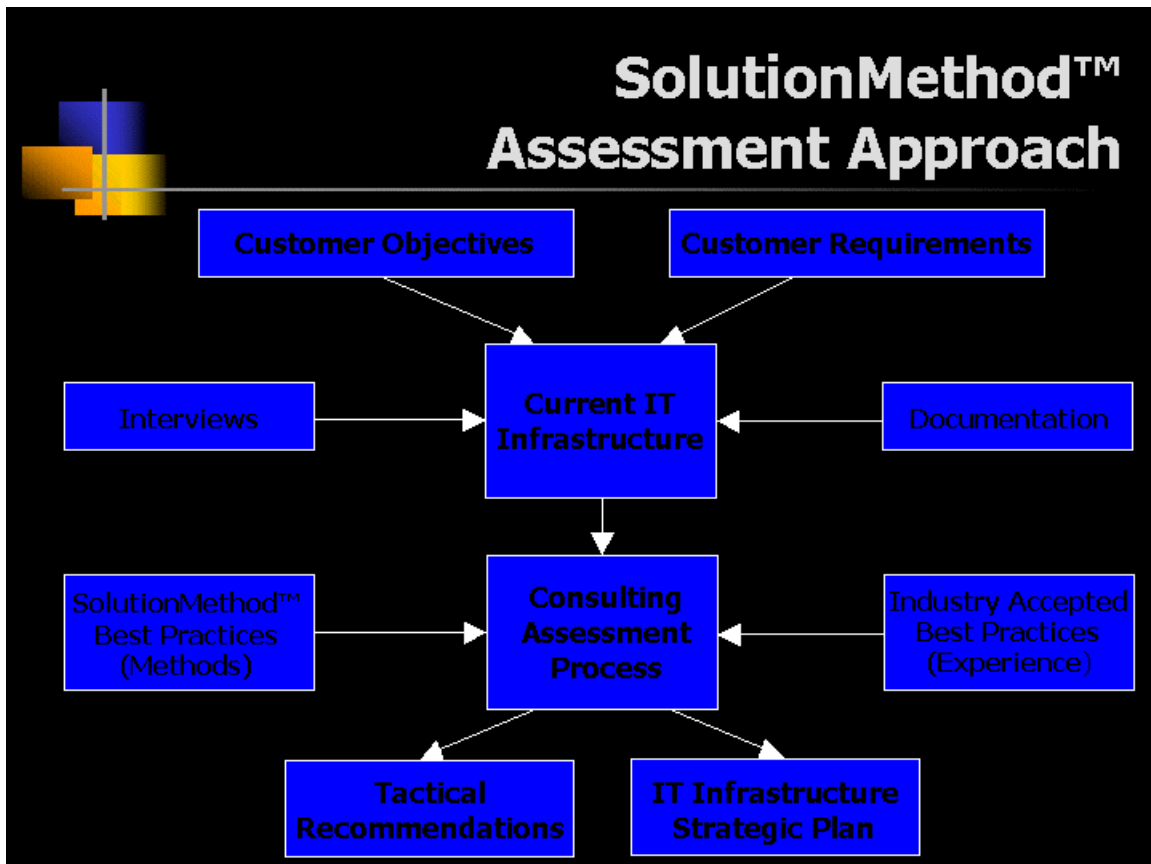
The scope of this service is to examine the existing maintenance practices and to determine which of them can be built into a recommended release strategy. The examination will include any used project life cycle methodologies, or programmer workbench facilities

The final outcome of this service is to assess and plan a customer unique set of best practices for release management processes that includes the appropriate synergy between them. This includes the dependencies and linkages of release management to other process such as incident and problem management, availability, service level management, change management, and configuration

management. This will provide the customer with a model to be used for developing a tactical and strategic position and direction for ITSM best practices.

Approach

The SolutionMethod™ approach depicted below is used for this Release Management service.



The following is a high-level list of tasks for this service:

- 1) Assemble a project team that includes the appropriate skill sets necessary to complete a successful project engagement
- 2) Conduct a project kick-off meeting between the consulting team and a comparable organization team. At this meeting an initial project plan will be developed and refined. This plan will be used to document, plan, and track the activities and results of the engagement.
- 3) Gather and assemble all appropriate information about the customer's current release management processes, its inter-relationship and dependencies. This includes the environment, the objectives,

requirements, and expectations for a desired future state. This information is supplied from existing documentation, interviews with the required organization personnel, and observation.

- 4) Analyze the information gathered as it relates to findings in the areas of IT service management and the processes that support it. This analysis will focus on organization's people, processes, technology, organization, and integration perspectives both in a tactical and strategic perspective. It will specifically focus on satisfying tactical requirements and strategic positioning to include full ITSM positioning.
- 5) Analyze the current Release Management process that includes but is not limited to:
 - The procedures that define the steps used in release management
 - The objectives of what release management needs to accomplish
 - The synergy and relationship of release management with other ITSM related processes that includes:
 - How maintenance requests are communicated and justified
 - Prioritization of maintenance requests
 - Current production support (or fixes) practices
 - Skill sets available to the maintenance effort
 - Organization of the maintenance effort
 - Use of life cycle methodologies and work bench like tools
 - Maintenance testing strategies
 - Current maintenance backlog, by major application
 - Maintenance procedures to allow for different skill and organizational approaches that includes:
 - Correction of failures
 - Changes in data and environments
 - Extension of functionality
 - Elimination of inefficiencies
 - Project planning, management and quality assurance of the maintenance effort
 - Scheduling and pacing of the maintenance effort
 - Testing and documentation of maintenance efforts
 - Possible duplication and reduction in maintenance changes made obsolete by a later change
 - Synchronization of the multiple software platforms that may exist
 - Improved, pro-active image for the IT infrastructure
 - Cost/benefit visibility for the maintenance effort.

- 6) Develop a list that includes prioritized tactical recommendations for release management in areas of IT Infrastructure and the processes that support it.
- 7) Develop a solution model that focuses on strategic IT infrastructure and processes based on an alignment with tactical recommendations, ITSM requirements, and strategic organizational goals.
- 8) Assess the organization training requirements for release management areas.
- 9) Develop a training plan for the organization team.
- 10) Develop an analysis report and associated customer management presentation that includes prioritized tactical recommendations for technology infrastructure and the ITSM processes that support it. These processes will be customer unique best practices for release management.
- 11) Develop an outline for recommended strategic IT infrastructure plan that includes “next steps” to meet the organization’s full ITSM requirements. This includes a size and scope for the effort and anticipated deliverables.

Deliverables

- 1) A report documenting the release management analysis findings within the customer’s IT Infrastructure at an appropriately high level that includes:
 - The organization’s current release management
 - The organization’s requirements and expectations for a desired future state
 - A gap analysis of the current state and the desired future state
 - The alternatives for achieving the desired state
 - A list of tactical recommendations, in customer specified priority order, for the steps to position the current state of the IT infrastructure to meet strategic ITSM requirements. This will encompass the perspectives of people, process, technology, organization, and integration
- 2) An initial IT infrastructure strategic plan for release management to achieve the desired state that encompasses the perspectives of people, process, technology, organization, and integration
- 3) A senior management level presentation summarizing findings, expectations, recommendations, and future ITSM direction.