

SIGNIFICANT EVENT MANAGEMENT

What is it and Why Should I Care?

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As an information technology (IT) professional you are paid to be both economical and efficient. IT has one of the shortest business cycles of any industry, and this week's hot property may be obsolete long before it's paid for. The search for the latest software, hardware, and memory is only a small piece of the puzzle that includes issues as complicated as the security of your system and as seemingly straightforward as the geographic location of your hardware.

As a system administrator, CIO, or IT Director, this is just a starting point for your trip to the top of the optimum system performance pyramid. The investment in these huge building blocks doesn't even include the time and process by which you actually arrive at the top.

So here's some questions you may want to ask: If I'm investing my hard earned dollars, how do I ensure the significant modifications will be a complete success? What do I do if something goes wrong or how do I know I am completely prepared for the transition? The system has to be completely accessible at the end of your change window with or without a completed modification.

A significant change to your system can be dangerous if proper preparation, testing, investigation or teamwork has not been developed. On top of the necessary preparations, can you find the time to properly allocate and coordinate required resources? Significant Event Management (SEM), offered by Lund Consulting Services can assist you.

SEM might be described as an effective means of overseeing major system events to maximize effectiveness of both the purpose of the event and the event itself. A high-quality deliberated plan will increase the probability of success in addition to leveraging the success of future transitions. In order for your internal customers; management and partnering departments, to subscribe to your transition you must show that there will be no ill affect on production and the resources requested will be utilized at maximum optimization. Most significant events are also somewhat labor intensive, which can only be exacerbated by lack of organization. Significant events may include operating system upgrades, hardware installation, volume set implementation, system consolidation, memory installation or relocation.

By utilizing the ISO 9001 approach, you leverage the knowledge and information from today and yesterday to make better business decisions tomorrow. A project is initiated with basic pre-project planning. At this point it is decided who will be a part of the SEM team and when the event will take place, system preparation is initiated and timelines for the change window allocated start to be designed. An assessment of the current system should be completed to clarify the changes that need to occur both before and during the change window. Finally, and perhaps most important, this is where you begin to design your personal "road map", the Change Control Document.

A change control document should contain a high-level and low-level management plan for the completion of the significant event. The high-level portion of the document summarizes the event phases whereas the low-level portion contains very detailed checklists for the engineers to use. In order for the Change Control Document to be a useful tool in the future, detailed information about the process and methodology by which your department plans to accomplish the goal should be included. An effective Change Control Document details the following aspects of a significant event:

Project Schedule – A master calendar should be created that includes regular administrative meetings, on-site visits, a schedule of events, deadlines for significant benchmarks, and a contact list of all the SEM team players. The schedule of meetings should be developed early and continually updated to ensure the preparation process is monitored and scheduled tasks are completed. Decide who will attend meetings at what point in the project and what the objectives are at major meeting points. Look at how you will effectively track action items as they arise and who will follow through so that they become “actions” and not just “items”. A separate meeting inclusive of department supervisors should be conducted to increase widespread confidence in the success of the significant event. Throughout the course of the significant event planning, communication and reassurance should continue to be offered to those potentially impacted by the change.

Project Overview – A description of the event changes should be documented to satisfy the “who, what, where, when and why” methodology. To summarize the significant event, a description of the changes should be followed by a high-level timeline for the change window, a contact list of the complete SEM team, a list of needed documents, the products being changed and the Go/No-Go decision points. This portion of the document can be extracted and used for collateral when presenting the significant event to those not directly involved with the changes on the system.

Project Timelines – There are various stages of SEM that help ensure that your system is available for use upon the conclusion of the change window. In addition to an overview of the significant event, a timeline and checklist for each stage should be documented on a low-level to ensure all steps are included. Each stage of the event should include decision points, action points, flow of work charts, and the role of each individual involved, including who is responsible for the lead in each stage. The stages may include system preparation, system installation (or the established significant event), a backout plan, system startup, system testing and return to production. These stages may include Go/No-Go decision points, system preparation checklist, and system installation timeline. Each timeline should include diagrams of system configuration, architecture, and computer room plans where applicable. As the well-developed SEM plan is followed, actual times of completion should be documented.

By the time your event is complete, you will have effectively created a working exit portfolio to be used as part of your planning for future significant event management. This document can also be effectively modified with each event, as you further learn tricks, tips and techniques that are more and less effective for your particular organization or department. In using this approach to significant event management, you maximize your return on investment in three ways. One, your system benefits from the improvements made, whether it's a memory or operating system upgrade, or expanded hardware. Two, your department has smoothly and successfully pulled off the event of the year. Three, you offer a model for success within the company for any minor or major change.

Above are just a few suggestions on how you can turn what could be a highly stressful aspect of your job into a positive learning opportunity for both you and the company. How you decide to get there is up to you, but no matter your decision, you don't have to re-invent the wheel. Stop by the Lund Performance Solutions booth (#773) to get more information on how you can come out on top.