Please release me, let me go!

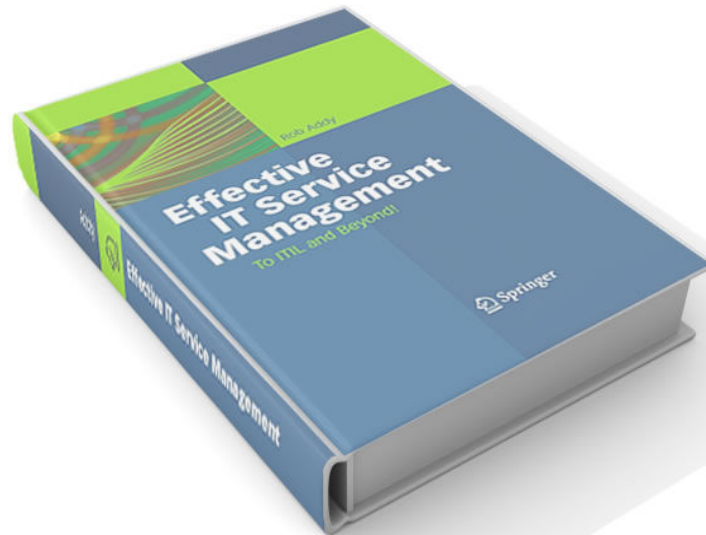**Rob Addy**

Author of "Effective IT
Service Management: To
ITIL and beyond!"
(www.effectiveitsm.com)

Are you sitting in the right session?

- Please release me, let me go!
    - Release Management is perhaps one of the more mysterious processes within the ITIL framework, this presentation expands upon the 4 common purposes for which this title is used and determines which definition (if any) should prevail.

A little about me…

What my publisher says…

- *Rob Addy is an ITSM professional with over a decade of hands on experience in the field with both enterprise and medium sized organisations. During this time Rob has been fortunate to work for many of the biggest names in the industry in a variety of roles in the UK and the US. From application development and support, to direct solution implementations, to product management and marketing, to consulting management and technical sales, Rob has gained insight into the ITSM world from a wide variety of angles. This 360 degree view of the market enables Rob to balance real life scenarios, customer requirements, best practice processes and technical solution capabilities and limitations to give a unique pragmatic approach to improving IT services using a combination of current best practice and tried and tested experience.*

Disclaimer

- The content of this presentation does not necessarily represent the position of my employer. Nor does it represent any intent upon their part to deliver products and services to meet the objectives and requirements covered. Any product references or comparisons are not intended to show a preference and should in no way be taken as a recommendation or otherwise

What we will be covering…

- Release Management – A definition

- The 4 common uses of the term

- An analogy for Release Management

- Focusing on the specifics

- A (not "the") way forward

Isn't there already a definition of Release Management?

includes a reference to the Configuration Item and a version number. For example, Microsoft Office 2003 SR2.
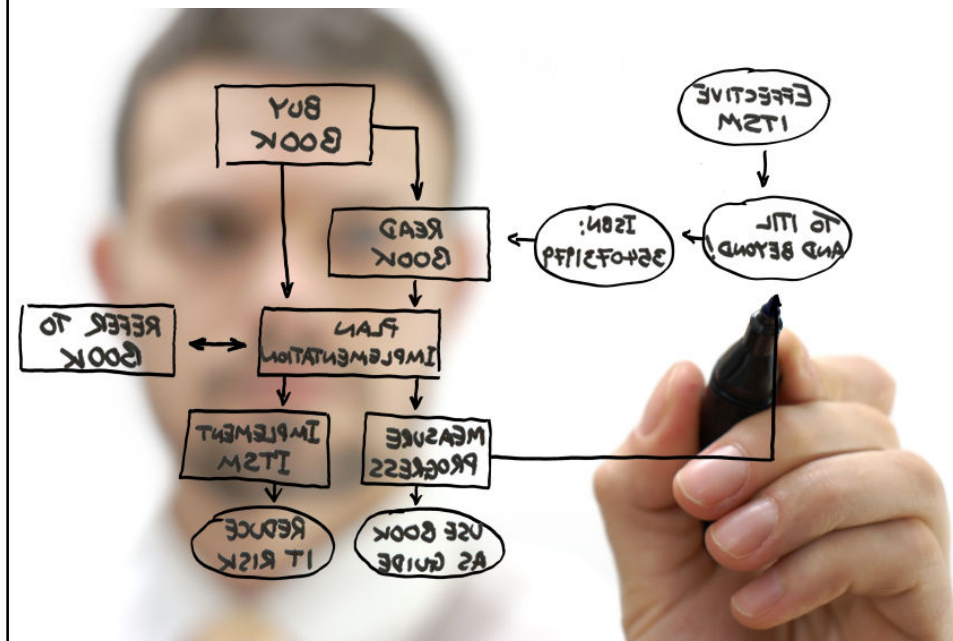
Release Management

(Service Transition) The Process responsible for Planning, scheduling and controlling the movement of Releases to Test and Live Environments. The primary Objective of Release Management is to ensure that the integrity of the Live Environment is protected and that the correct Components are released. Release Management is part of the Release and Deployment Management Process.
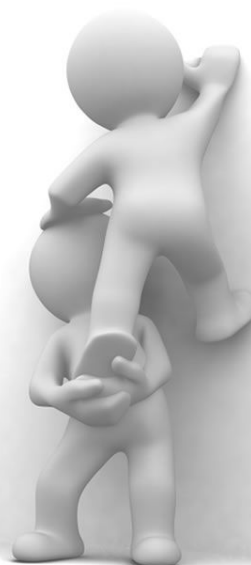
Release Process

Release…

A process is a process is a process…

Therefore, Release Mgt is…

- The process for managing the controlled escape of changes into the production environment…

Alternatively, Release Mgt is…

- The process of pushing changes from development into the production environment…

There are several points of view…

The 4 common usages of the term

- Change implementation process
- Software development management process
- A means of coordinating a bundle of related change requests
- A process for implementing changes that affect significant numbers of assets and/or users

Change implementation process

Software development
management process

A means of coordinating a bundle
of related change requests

Process for implementing changes that affect lots of assets or users

The 4 common usages of the term

- Change implementation process
- Software development management process
- A means of coordinating a bundle of related change requests
- A process for implementing changes that affect significant numbers of assets and/or users

But which is right?

There is no right or wrong

So what are we going to talk about then?
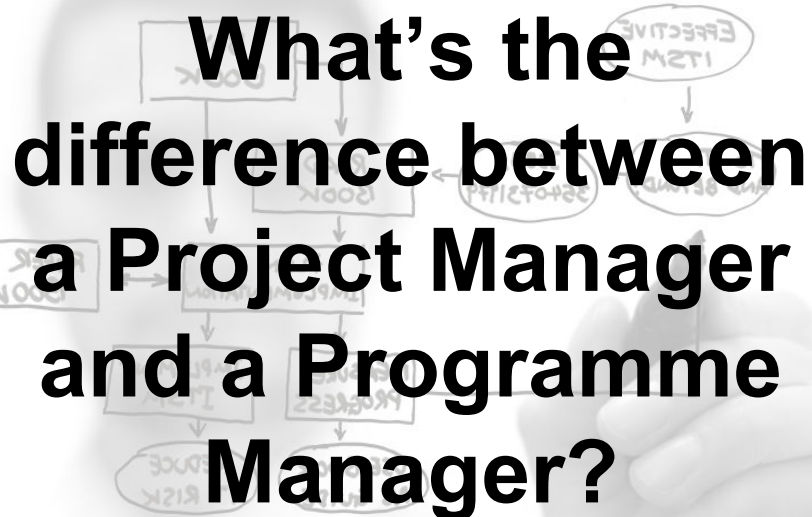
We will focus on 2 of the definitions

- Change implementation process
- Software development management process
- A means of coordinating a bundle of related change requests
- A process for implementing changes that affect significant numbers of assets and/or users

An analogy…

Change Management is to Release Management what Project Management is to Programme Management

What's the difference between a Project Manager and a Programme Manager?

About 50k on the base salary in today's job market!

The similarities are obvious…

- Project Management
  - Track task assignment, completion and resource usage to meet project goals
  - Collate requirements and manage change request process for the project
  - Identify shared objectives between tasks
  - Facilitate communication and collaboration between specialist implementation groups
  - Act as an arbitrator in cases of conflict or difference of opinion
  - Ensure overall project objectives are included even where they may conflict with short term tasks
  - Suggest areas where different project team members may work together for mutual benefit

- Programme Management
  - Identify shared objectives between projects
  - Facilitate communication and collaboration between isolated implementation teams
  - Highlight potential conflicts and inefficiencies
    - Similar resource requirements
    - Sequencing / Scheduling issues
    - Potential areas of duplication
  - Act as an arbitrator in cases of conflict or difference of opinion
  - Ensure overall organisational objectives are included even where they may conflict with the short term project goals
  - Suggest areas where different project teams may work together for mutual benefit

The similarities are obvious…

- Change Management
  - Systematic planning and implementation of work packages (Defined series of interdependent tasks) to successfully reach a predefined outcome after analysing impact and risk
  - Efficient and error free implementation of changes to assets and processes

- Release Management
  - Holistic planning and overseeing of multiple changes in parallel to successfully reach a predefined outcome taking into account wider business objectives and priorities
  - Successful implementation of complex releases involving many changes

Really really really really obvious…

identify a release. The release identification typically includes a reference to the Configuration Item and a version number. For example, Microsoft Office 2003 SR2.

Release Management
(Service Transition) The Process responsible for Planning, scheduling and controlling the movement of Releases to Test and Live Environments. The primary Objective of Release Management is to ensure that the integrity of the Live Environment is protected and that the correct Components are released. Release Management is part of the Release and Deployment Management Process.

Release Process

But it is the differences that are key

- Candidate selection
- End-point definition
- Packaging
- Target selection
- Baseline levelling
- Implementation strategies
- Mopping up

Selecting candidates for inclusion

Defining an end point

Trust technology to ruin a perfectly good example…

Packaging and targeting

Pre-requisites / Baseline levelling
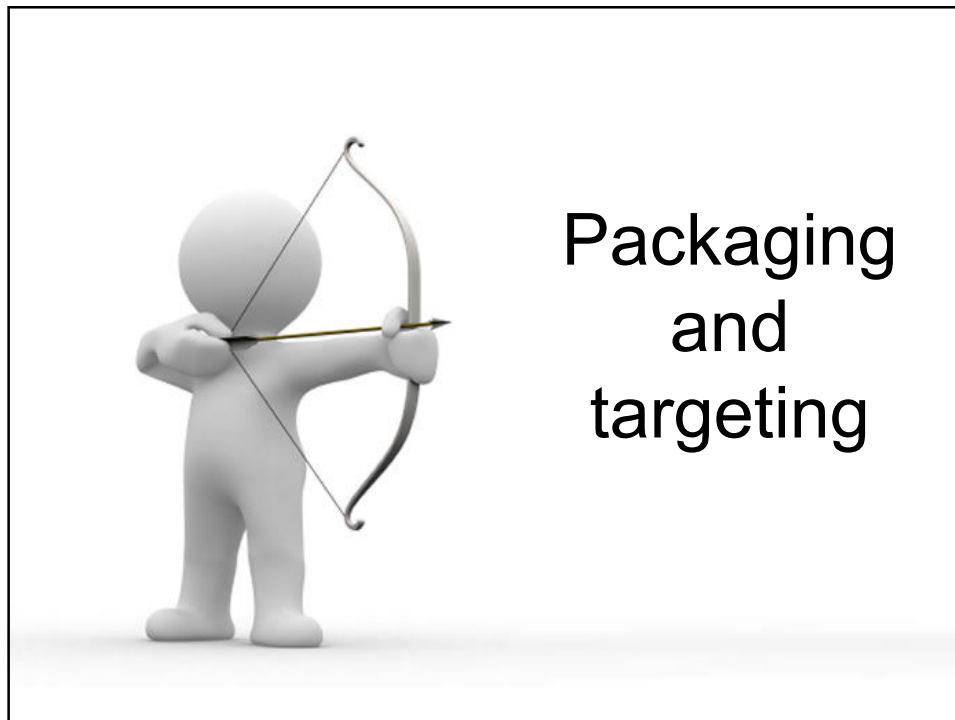
Multiple implementation strategies

PHASED APPROACH

BIG BANG

SHELF UPDATE
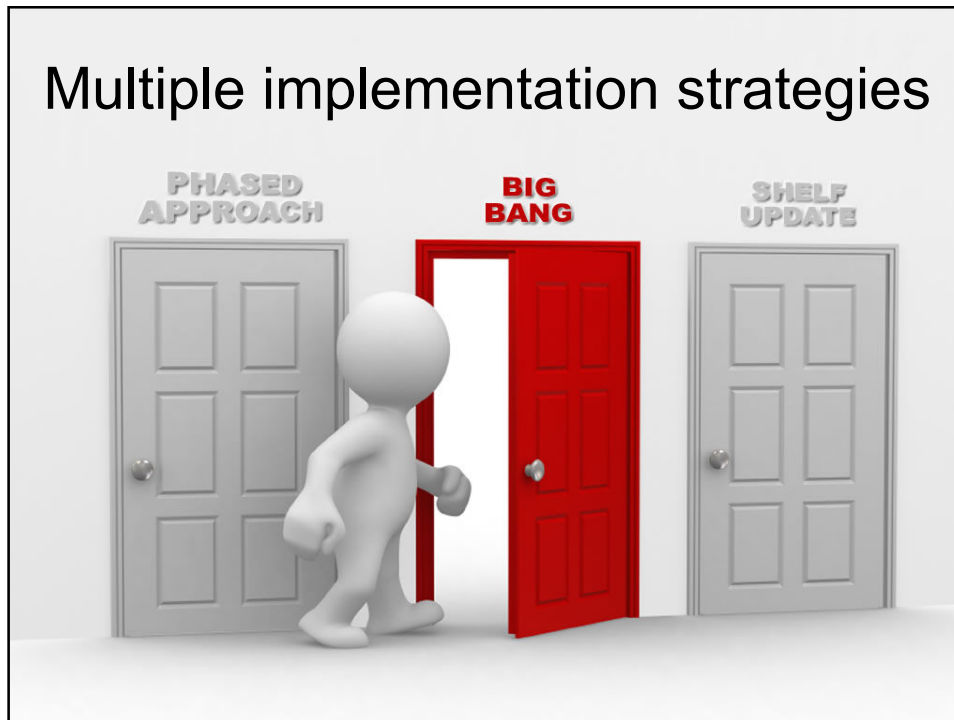
Mopping up

(AKA Picking off the stragglers)

CAUTION

WET FLOOR

So Change and Release Management are similar but slightly different…

Ok, so what do I think?

ITIL is turning a black art into an overly complicated science

- From 10 processes to 20-26
- Not even the V3 authors agree on how many processes there are
- The names have changed arbitrarily
- Separation for the sake of separation
- "Release Management" has been extended with "Deployment Management" to pander to the whims of the major players

A single robust *"change management"* process should be sufficient…

A process…

Change Management

- Review requirements(s) / Identify goal
- Formulate high level plan
- Obtain approval to proceed
- Define tasks and dependencies
- Conduct risk assessment and back-out planning
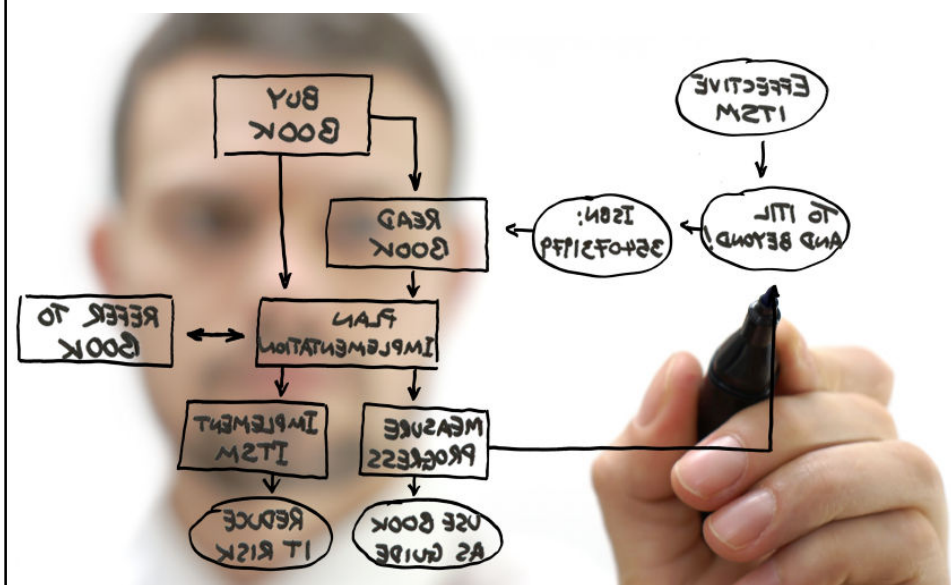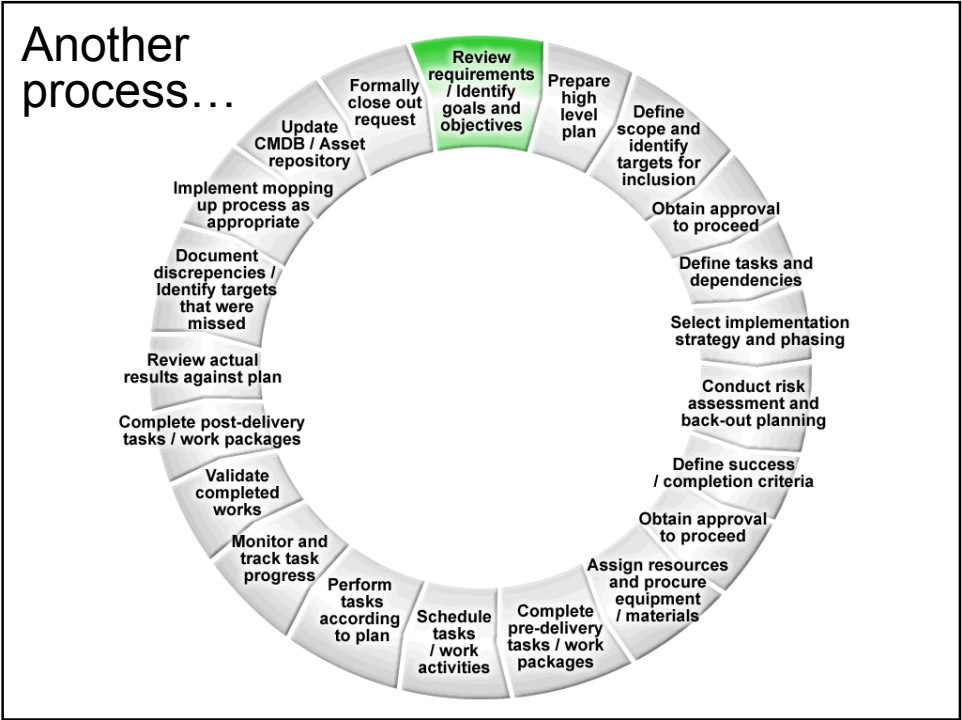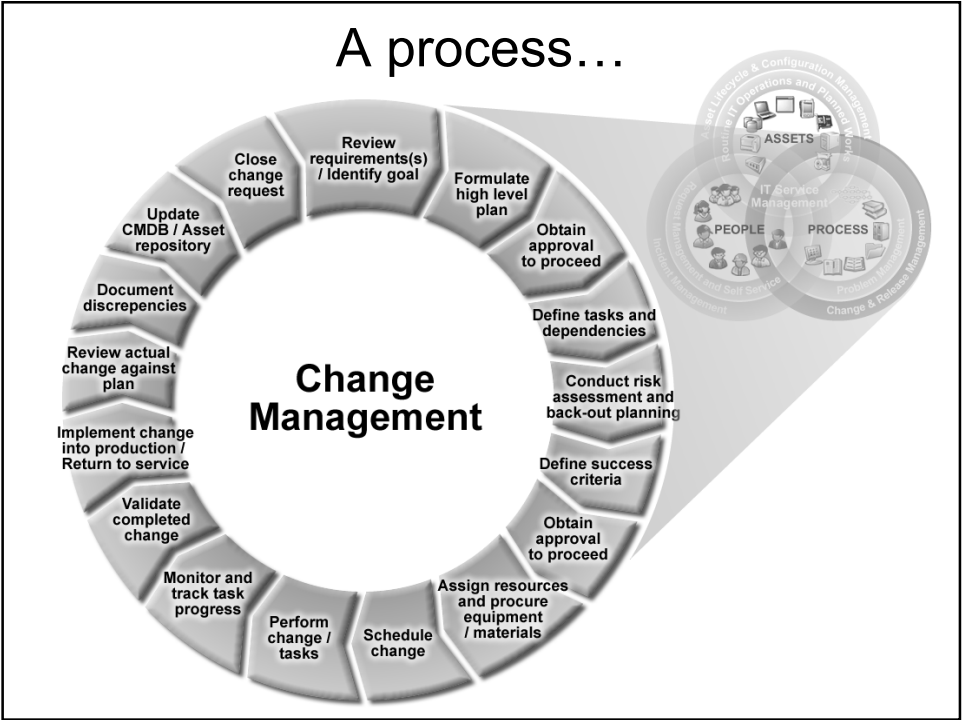- Define success criteria
- Obtain approval to proceed
- Assign resources and procure equipment / materials
- Schedule change
- Perform change / tasks
- Monitor and track task progress
- Validate completed change
- Implement change into production / Return to service
- Review actual change against plan
- Document discrepencies
- Update CMDB / Asset repository
- Close change request

Another process…

- Review requirements / Identify goals and objectives
- Prepare high level plan
- Define scope and identify targets for inclusion
- Obtain approval to proceed
- Define tasks and dependencies
- Select implementation strategy and phasing
- Conduct risk assessment and back-out planning
- Define success / completion criteria
- Obtain approval to proceed
- Assign resources and procure equipment / materials
- Complete pre-delivery tasks / work packages
- Schedule tasks / work activities
- Perform tasks according to plan
- Monitor and track task progress
- Validate completed works
- Complete post-delivery tasks / work packages
- Review actual results against plan
- Document discrepencies / Identify targets that were missed
- Implement mopping up process as appropriate
- Update CMDB / Asset repository
- Formally close out request

The biggest obstacle to such an initiative should be deciding what to call the combined process

…and if it isn't, then the process must be flawed

Change and Release Management

So what did we cover?

- Release Management – A definition

- The 4 common uses of the term

- An analogy for Release Management

- Focusing on the specifics

- A (not "the") way forward

Before you go…