High-Performance IT

Quotations and Change Control

Quotations

The Best practice IT Standard is:

A quotation template that formalizes and integrates the three processes of scoping, estimating, and quoting. The quote requires the scoping of hardware, software, and services with prices from an IT services catalogue and/or an architecture products catalogue. The quote should have a fixed validity period.

Around 50% of business work requests disappear after a proper quotation has been prepared. Using the 'Mandatory, Highly Desirable, Nice to Have' technique when determining scope in conjunction with an IT services catalogue improves accuracy and rapidly speeds up the quoting process.

Sample Catalogue Listing

The official definition of an IT Services Catalogue is from ITIL and it defines it as a database or structured document with information about all IT Services that includes information about deliverables, prices, contact points, ordering and request processes.

Category	Service
Software	Software Distribution, Licensing, Implementation, Licensed Software, Web Developer Tools
Support and Training	FAQs, Online Help, Training Programs, Teaching and Learning, Knowledge Sharing
Networks and Connectivity	Wi-Fi, VPN, LAN, WAN, Network Monitoring
Messaging and Collaboration	Email, Instant Messaging, Mailing Lists, Calendar, File Sharing, Fax
Voice	Mobile, Telephone, Audio Conferencing, Video Teleconference, Radio
Accounts and Access	Identity Management, Guest Accounts
Cloud Services	Provisioning
Data Centre	Off-site Storage, Facility Management
Hosted Services	Web Hosting, Database, Data storage, Backup Services, Content Management
Security	Security and Privacy Policy, Disaster Recovery, Network Monitoring
Video	Video Equipment, Television
Print	Printing, Copy, Printer Maintenance
Infrastructure	Web Services, Wiring Services, Load Balancing, Mainframe
Hardware	Desktop PC, Laptop, Mac, Mobile Device, Server, Accessibility Resources, Tape Management
Professional Services	Strategy, Planning, Project Management, Document Management, Application Integrations, Digital Asset Management

Performance Assessment

1. How are quotations currently prepared?
2. How accurate are current quotations?
3. Are there scoping and estimating processes integrated to form a single quote?
4. Is there a standard quotation template in use?
5. Is there an IT services catalogue?
6. If there is no IT services catalogue is in use, how are hardware, software and services identified and priced?
7. How long is IT bound by its quotations?

Sample Task list

1. Create an IT services catalogue.
2. Create a standard quotations template for use across IT.
3. Create an umbrella quotation process to manage the activities of multiple teams involved with creating a quotation.
4. Create an estimating guide.
5. Who will prepare quotes?
6. Who will own the quotation process?
7. Determine further works required and scope out.
8. Breakdown the scope of works to task level, ready for loading into the change management project schedule.

Change control

The Best practice IT Standard is:

A Change Advisory Board (CAB) being in place, with evidence-based change control acceptance criteria needing to be approved before a change is promoted to Production. Since Change Control is the process that promotes changes into Production systems with the intent of no disruption to those systems, the CAB is held accountable for any subsequent Production systems availability issues, stability issues, integrity issues and failures. (This last sentence is highly contestable by some as it is seen as being too burdensome on the CAB. But if you want guaranteed production worthy promotions then a policing approach with clear accountability is what is required.)

Performance Assessment

1. Are Change Control and Version Control processes in use?
2. Are these processes documented?
3. What change management software is in use?
4. Is there a Change Advisor Board (CAB)?
5. If not, how is change control managed?
6. Are CAB acceptance criteria clearly spelt out?
7. Does CAB enforce its acceptance criteria and process?
8. Is the CAB accountable for any postproduction promotion problems?
9. What authority does the CAB have?
10. Are the CAB acceptance criteria documented and enforced?
11. Who is the final CAB arbitrator?
12. Who can override CAB?
13. Do the CAB acceptance criteria include items like?
    a. Back-up testing completed.
    b. Disaster Recovery plan updated?

     c. First level Service Desk staff trained.

     d. Level 2 support staff trained.

     e. Interface testing completed.

     f. Software licensing in place?

     g. Parallel runs completed?

     h. Operations procedures updated?

     i. Known problems reported to Service Desk?

14. Are there any current change control operational issues?
15. What is the promotion to production update failure rate?
16. Is there a warranty period for production changes and releases?
17. How are urgent fixes managed?

Sample Task list

1. What is the level of risk of introducing errors or untested changes into the production environment?
2. What needs to be done to mitigate any risks?
3. Review the process for introducing urgent fixes.
4. Implement a CAB.
5. Review CAB submission guidelines.
6. Empower the CAB.

IT Function	Best Practice IT Standards
Service Desk and ITSM	ITIL compliant Service Desk application and ITIL/ITSM Service Management Framework.
Workload Management.	End-to-end process comprised of Gating, Work Management, Work Classifications and Management Reporting.
Process and Intranet	All work is process driven, with documentation management and templates managed in accordance with the Capability Maturity Model (CMM Level 2). All process, how to guidelines and other documentation sourced only from an Intranet. All documents are baselined with a single production version. The Intranet acts as IT memory and the single source of truth.
Managed Services	Contract Manager with a Outsource Diary, detailed knowledge of SLAs and contract schedules and weekly contract reviews.
Staff Training	Vendor product training.
Infrastructure.	Fleet upgrade strategy.
	Capacity Management function for servers and network.
	Desktop refresh strategy.
	Standard Operating Environment (SOE).
	DBMS management function.
	Server performance management function.
	Formal naming standards for servers and network hardware.
	Policy on use of scripts.
Applications Development. Methodologies.	Tailored SDLCs, Applications development suite, Documented legacy applications. Documented methodologies, guidelines, and policy on use of scripts.
Projects.	End to end project management delivery process with supporting templates, guidelines, and reporting documents.
Project Management Office.	Active PMO (as against passive), project management processes, templates, and guidelines.
Quoting, Scoping, Estimating.	Services catalogue, standard quotation template.
Security.	Five levels of security management with penetration testing.
Change Control.	Change Advisory Board (CAB) with evidential submission criteria.
Disaster Recovery.	BCP, DRP. Testing, back-up site.