Release **and** Deployment

An ITSM narrative

Daniel McLean

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Release and Deployment

An ITSM narrative account

DANIEL McLEAN

IT Governance Publishing

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PREFACE

During a consulting engagement, I was interviewing a high performing and very successful EVP of sales for a multi-billion dollar company. We discussed IT, its role in leveraging business capabilities, and its historical performance in providing that leverage at his company.

I told him I was trying to identify what IT could do to provide the greatest amount of leverage for the business. If it were up to him, what would he have IT concentrate on above all else? What would he like IT to have as its number one priority?

I expected a laundry list of technology tools to aid in managing his sales force, prospects and customers. I was a little surprised at his instant response, "Don't break anything that's working." There is tremendous insight and truth in what he said.

There are some best practice processes that are foundational and need to be implemented first. There are others that can be enabled more slowly.

Imagine you're the head of a company whose IT organization can't effectively restore service after incidents. When a business service fails, IT might or might not be able to get it working, or even know what to do to make it work again.

If you can't depend on IT to restore service, then you would either want to change the people in your IT organization, or come up with another way to provide that business leverage.

Preface

Just as an effective incident management process is required in any IT organization, so is an equally effective release and deployment process. They are part of the group of best practice processes needed from the start.

Much of the work involved in enabling release and deployment processes involves changing how people work. The words, "People – Process – Tools," are in that order for a reason. If People don't embrace the activity, then the Process and Tools won't matter. Changing people's behavior is one of the hardest things we do in business and something IT people find most difficult.

High performing IT organizations learn how to change people's behavior as easily as they change technologies. Changing behavior is one of the most difficult things you will ever do in business. IT is often at a disadvantage because IT organizations are not known for their strong people skills but that doesn't mean they can't learn.

This is one in a series of books designed to help you understand how others implemented new processes and made the necessary changes to people's behavior.

These fictionalized narratives are based on the actual experience of people just like you … dealing with the same types of people and issues you face every day.

Look at what worked … see what failed … understand the traps to avoid. Learn from the characters' successes and avoid their mistakes.

ABOUT THE AUTHOR

Mr McLean is a consultant who has designed, implemented and operated processes supporting ITSM for over 12 years. He has worked in IT for over 20 years.

He has been involved in the development of global best practice standards and courseware customized to company-specific operational practices and needs. He has worked in the US and the Middle East.

Mr McLean is the author of *The ITSM Iron Triangle: Incidents, Changes and Problems, No One of Us Is As Strong As All of Us: Services, Catalogs and Portfolios, Integrated Measurement – KPIs and Metrics for ITSM* and *Availability and Capacity Management in the Cloud*.

These narratives are designed as both standalone works and components of a larger integrated story arc covering the ITSM world and its challenges.

Mr McLean's consultancy focuses on fusing best practices from multiple ITSM standards into practical operational processes, optimized for each organization's particular environment and needs. He provides this support at the design, implementation and daily operation levels.

Among other honors, Mr McLean holds multiple ITSM related best practice and ISO/IEC certificates.

Mr McLean holds both Bachelor's and Master's degrees from Cornell University.

Mr McLean resides in Chicago, Illinois, US.

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No IT organization can survive for long without an effective release and deployment process.

Without it, IT will either be supplanted by a third party organization at the demands of the business, or the entire company will collapse. An IT organization without an effective release and deployment process is like an IT organization without incident or change management.

Like a public utility, release and deployment is highly visible only when its failures disrupt the business. When done correctly, very little activity should be visible to the business.

Release and deployment processes exist to plan, build, test, schedule, and control the deployment into production of releases that will increase the capabilities of the business without damaging the integrity of the current services.

Release and deployment touches virtually all of the ITSM processes. Each one of those connections presents a risk of failure points that need to be managed. There are so many ways release and deployment can vividly fail that it is a testament to the skill and commitment of those involved when it quietly succeeds without notice by others.

But not every release deployed into production goes smoothly. When something does go wrong, a trickle of calls and alerts can quickly become an avalanche. The service desk is soon overwhelmed with calls from users. The pagers and phones of the development and support teams light up at all hours of the day. Senior business leaders are

on the phone to the leadership of IT yelling about lost revenue and threatening replacement by third parties.

Within IT, the finger of blame always points to the owners of the impacting process – Release. This is unfair and displays the confusion that often exists in IT about the exact nature of deploying releases, who is involved, and the ways in which things can go wrong.

At its simplest level, release is a noun, describing a number of changes which are built and tested to be deployed together. Deployment is a verb describing the enablement of a release in the live production environment.

The actual introduction of the release into live production is just the tip of a process that interacts with a number of other organizations, such as application development, quality assurance, infrastructure, business relationship management, change, finance and others. The challenge is that these organizations are not normally part of the release manager's team, except on a loan and as available basis. Regardless, the release and deployment manager remains accountable for the result.

To succeed in that role, release and deployment managers need to successfully navigate the web of relationships between those groups and, more importantly, the people in those organizations. Success is highly dependent on the ability to manage, by influence, those other teams. In this case that means not just managing your relationships with others but also helping them manage their relationships with each other.

This is especially true in the foundational area of business requirements and its critical link with design and development. You often see IT organizations celebrate their

activity and achievement, only to find out they have failed to meet the needs of the business. They failed because they were successful at doing the wrong thing. They did it right but it was not what the business needed.

The minimum essential steps that need to be taken are to empower a role gathering the business requirements, ensure it is tightly coordinated with design and development in a way that is responsive to the dynamic business environment, and charge the release manager with building connections between the functional knowledge towers. That level of agile engagement is difficult. Even with the right person in place, it takes practice and time to become proficient.

The next time someone raises questions about resourcing release and deployment, or delaying its enablement, tell them that these are not essential questions.

Remind them that the real question is, "Do you and your IT organization want to survive"?

All actions, places, organizations, people and events described, while based on real experiences, are fictitious. Any resemblance to real people, living or dead, is entirely coincidental. Any resemblance to actual places, organizations or events is entirely coincidental.

CHAPTER 1: WINNING THE JOB

Megan rubbed her fingertips against each other, giving the impression she was either praying for guidance or contemplating her prey. She took a slow, very deliberate breath and paused. As the silence filled the room, her smile made it clear she was looking for a victim, not guidance. And it was my bad luck to be the quarry sitting across the desk from her.

I was tired of job hunting. It had been almost four months since Jessica, my boss at the last company, was forced out in some smooth manipulations by a few other directors. Apparently they were jostling for a soon to be announced VP vacancy and she was just the first casualty in what became a sharp-elbowed conflict for supremacy. It was not unusual, just what goes on at that level in most big companies. What I found perplexing was that every time I saw it, the company's senior leadership was well aware of what was happening. They knew it did nothing for the stockholders or the customers, yet stayed out of it and almost encouraged it. Perhaps it was because that is how they all rose to their positions. Or maybe it was their way to determine who had what it takes to work at their level. I'd probably never get the chance to find out.

Once Jessica had been ousted, the other directors created systematic cases to clean out her entire team, regardless of their individual performance. This scorched earth behavior was very standard behavior and they were very efficient at it. About the only thing they didn't do was to salt the earth and conduct some sort of ritual public mutilation.

And of course I was one they pushed out after Jessica.

1: Winning the Job

The job market was still weak in this part of the country, so being forced out of a company was definitely a career threatening situation. I knew there were a lot of candidates for each job in the area. All of them reasonably qualified so it was hard to go wrong. It was just the way employers liked it, because it kept the staff quiet and obsequious. Networking was the only way to find a position and even then you had to stand out from the rest in some unique way. But when almost your entire network is out of work too, it doesn't help you a lot.

Megan leaned across her desk. Her words snapped me back to the interview.

"Tell me, Chris. What makes you more appropriate for this position than the other people I've talked to this week? Why should I take a chance on you"? Then she glanced at her watch and huffed as if she were behind schedule and had three more people waiting outside her office for interviews.

I sat silently for a moment, composing an answer that wouldn't sound like, "Because I'm the best you are going to see and you'd be a fool not to hire me. Release may not be my career aspiration, but I've done this before and am so over-qualified for this role that I can do it standing on my head while holding my breath."

But after all the interviews I'd had over the last couple of months, I knew that would be unwise, unless I was looking to cut the interview very short. I started to speak, but with the exquisite timing of a chess grandmaster, she cut me off.

"Let me put it differently. I just don't understand why you would even consider applying for this job. You'd be bored to tears in a week. I mean, after all, you have an amazing

background. You must know so much more about the release and implementation of apps than anyone else here … even me, and I've been through one of those 'All-Told' fundamental classes for IT services."

I mentally winced at her apparent lack of awareness and understanding. Perhaps this was a test to see if I knew what she was talking about and how, or would, I correct her.

Megan leaned back in her chair, looking oh so contented with her questioning. It was a well-structured inquiry. It was seemingly simple at first glance, but full of complex nuance just below the surface. She had put me in a position where defending my skills would give her a reason to reject me, while down-playing them would also give her a reason to reject me.

I'd researched Megan thoroughly and been lucky enough to discover leadership had parachuted her into this role straight from her work overseeing construction of solutions by the development teams. She'd been incredibly successful building tools, but had little experience in making them useful. I guessed that leadership was testing her with this assignment. This mundane role couldn't be her dream position. She probably viewed it as a way to show that she was the company's next golden child and not some one-hit wonder. My sense was that she was trying to break out of IT and into the business side of the house … the place where all the advancement, glory and money resided. She seemed experienced enough to know that if she brought me in and I failed as release manager, it would be viewed as a negative on her. And in the hyper-competitive world of director and above, even something as mundane as a bad hire into a key area could be enough to hold you back … if she were lucky enough to keep her job.

1: Winning the Job

I didn't want her to be threatened by me, but at the same time I wanted her to feel I would have no problem executing the role, and I would present little risk to her career if she hired me. Despite her display of ignorance illustrated through her personal training comment, I didn't need her to know what I knew to succeed. But it was important to her ego that she thought she did. She needed to feel comfortable that I was not a threat to her or her success. And that was her mistake. Managers, who insist they know just as much, if not more than everyone who works for them, are never very effective.

The good news was that people who get parachuted into a situation by leadership almost never have any expectation of having a career in that role. They simply see it as a way to show leadership how good they are at producing results and reinforcing the common mistake weak leadership can make … namely that a good manager can manage anything, regardless of their background. Once she had reinforced leadership's preconceptions of the world, they would move her to the next crisis and to become their go-to warrior … at least until she stumbled. Then they would replace her with their next superhero with a cape. To them, she was expendable proof of their superior vision and understanding of the business. After all, they were senior leaders because they possessed those attributes, and anyone whose performance called that into question was clearly substandard and needed to be replaced. Failing to confirm and reinforce that was a sign of a failed superhero, not a gap in leadership assumptions. I'd always found that to be nearly hilarious … only in a company could the idea flourish that when reality doesn't agree with preconceived assumptions, clearly reality is wrong and will be ignored until it corrects itself and aligns with their assumptions.

1: Winning the Job

I struggled to keep wearing my best poker face and reminded myself that people who become senior leadership have some superb insights that we could all benefit from. So I followed the example of many great leaders by answering the question I wanted to answer, not the one Megan had asked.

Shaking my head slightly, I broke eye contact for a moment and looked up at the ceiling. That was an okay kinesthetic. Looking down would have been a disaster. After a moment of silence to encourage her to think she'd thrown me off balance, I looked straight at her, gave a slightly exaggerated sigh and said, "You know, Megan, it is really very sad. Fortunately, the fact that I am here talking to you makes it clear your company gets it. It is tragic so few companies do."

Her mouth parted slightly, as if to speak, but no words came immediately out. A response that jerked the conversation in a different direction by letting me frame my response from a, "can't win" to a, "can't lose" path was not what she had expected. But I was determined to stand out and show her I could play the interview game as well as any.

I pressed the palms of my hands together in front of my face for a moment, before putting my hands palms-down on the desk and leaning a little closer across the desk. Not close enough to violate her personal space, but just enough to make her feel I was very serious … that I was sharing a deep insight with her … that I was giving her a special and perhaps even secret message. I lowered the register and volume of my voice. Slowly shaking my head back and forth I said, "The transition of projects into production is

where so many companies stumble and so much great development work is wasted."

I sat back a little in my chair. "I'm sure you've seen it before. Uncountable hours of hard work designing, building and testing a brilliant solution, and then when it's time to bring it to life for your customers, it all falls apart at their first touch and no one appears responsible. It falls apart not because anything has changed about the solution. It falls apart because of how the solution is developed, moved into the live environment and integrated with all the other applications."

I slowly shook my head. "It's tragic. That's why I was so excited to see that your senior leadership understood the dynamics and was determined to avoid that happening again by putting someone with your strengths and background in charge of putting the team in place to manage the solution. That's the kind of executive vision and commitment that inspires us all."

I looked up and straight at her. "Don't you agree"? Sometimes a thematic non-answer beats a content rich response.

She nodded, and for the first time in our interview, that smirky smile of power was nowhere to be found on her face.

"Yes," she stumbled, not wanting to sound like she thought senior leaders were making a mistake. Then swallowing hard to regain her composure and show me how insightful she was, she nodded and said, "I've seen it too, of course." After a brief pause, she added a weak face-saving, "At other firms, of course. That's why I agreed to this role, this

opportunity to build a team to rescue the company from a faulty process."

I cut her off before she could continue. You had to be careful with thematic answers. Sometimes they induce the other person to ramble around and around your statement, endlessly confirming it. One of the pieces of interview coaching I'd received from my mentors was to always try to turn the interview around, so that they're trying to impress you, not the reverse. "Yes. I could tell you understood the situation. It was very clear from your line of questions in this interview. Your leadership vision made you want to ensure it would be covered for this role by over-hiring the skill set and not relying on someone who only met the minimum qualifications."

By the way she nodded and smiled it was clear she was aligning with me.

She responded with, "That's why they put me in this role … to get the right set of resources and processes in place to ensure we can support the needs of the business."

"Have you begun any efforts to establish a process to make things work better"? I moved the interview away from me to a tactical review of how she was currently addressing the issue, so the focus of our conversation became my reviewing her actions so far, rather than her trying to find a reason to knock me out of the competition.

I already knew the answer because I had done enough research and networked with enough former employees to know that the transition of bright and shiny projects into customer solutions was consistently a train wreck here. And despite the oblique wording of the posting for the position opening, it was clear they didn't have a solution and

probably not the will to fix it, even if they knew what the solution should be. That's the role they were really interviewing me for, even though the official position title was, "Project Manager."

That didn't bother me. Almost every company I knew had the same problem. Leadership was always overly impressed with activity, but the grunt work of making it operational and successfully transitioning it into a means of adding value, was too mundane to hold the interest of leadership for extended periods. They just wanted it fixed.

What many missed was that the real value was not in the production of the application itself. There was a lot of incredible work by highly talented people to create something that was often amazing. The teams that made that happen deserved credit and reward for their efforts. But the ultimate value went back to the real purpose of IT – to increase through partnership and technical leverage, the capability of the business to achieve their goals. If we weren't doing that, as far as the company was concerned, we were simply consuming oxygen and reducing the occurrence of rust in the building.

I had a simple question. If they wanted someone to help build a way to successfully integrate projects into the customer's world, why hadn't they been more direct about it. Either they really had no idea of what or how to do it, or there was someone on the grey organization chart who had the job and was failing but hadn't been removed because they had a lot of pull on the grey chart.

Every organization has a formal organization chart as well as a grey chart. The formal chart is the one they show to people and use to give titles. The grey chart is where the real power lies. It's a roadmap to whose voice rings the

loudest. The reason so many people struggle with the grey chart is that it is never written down. There are no records and no documents to investigate. The only way you know what it looks like is by paying close attention to the relationship dynamics between people independent of title. If you are lucky a mentor or friend may share what they have learned with you. No one ever seems to know all of the grey chart, only sections of it, and the grey chart is in a constant state of flux. But the more you know, the more you can impact how the company works.

By the time we got to the end of the interview, I was almost confident Megan would recommend hiring me. The way she talked it seemed more like she was selling me on the company than I was selling her on me. It felt really good.

"I was wondering who my direct manager would be in this role? It is a little unusual to get to this point in the interview process and not meet them, or even know who it would be."

She nodded. "We are still structuring the role in the organization. We needed to see the skills and experience of the best candidate before we decided how and where they would fit on the team."

"Oh … " That sounded like cover for leadership indecision or fighting over reqs.

"But I think that if you are the right person for this opportunity, with your background and experience, moving forward … rather if we decide to move forward, it makes more sense for you to report directly to me."

I tried to cover my surprise and pleasure at the idea of working directly for a senior leader like Megan, especially one who knew very little and would therefore let me set my

own agenda, as long as it advanced her career and position amongst her peers.

By the time I was in the parking lot, I was convinced the job was mine. I made a mental note to make sure everything was in order outside work. I hoped to start this new job quickly because I really needed the money and I wanted to give it my all, especially in the beginning. I knew that a good 90 day halo would stick with you for years if it was strong enough.

Two weeks later, I had a signed sweet job offer and a start date. This was going to be good.

Knowledge that would have helped Chris

- You will often find your immediate boss may not be able to do your job, even if their career depended on it. Remember that is why they hired you. They were smart enough to hire someone who knew a lot more than they did. If you find yourself working for a boss who can do your work as well, or better than you can, you may find yourself working for a micromanager who will focus on how you do your job, as much as what you deliver. Regardless of the type of boss you end up with, your success and survival demands that you determine the level of involvement they need in your work as soon as possible. In other words, knowing how involved your boss wants to be in your job is essential information to your survival.
- Always look at the situation independently from the job description, to see if the two are in sync. Many times the hiring organization will not fully understand what is needed to solve the issue. This will give you a

tremendous advantage during your interviewing and hiring negotiations. Being able to take them from what they think they need, to what they may really need, can be a game-winner for you. The risk is that you are talking to someone who is insecure, suffers from hubris, or is otherwise convinced they know more than anyone else.

- When you develop the solution to achieving a goal, there is still a lot more to do. You must also sell your solution to others. Too many ultimately fail, not because they were weak, but because they weren't effectively sold to the right constituencies. Always remember, people are the single biggest contributors to success or failure. Which alternative you get depends on how well you convince people to align with your solution.

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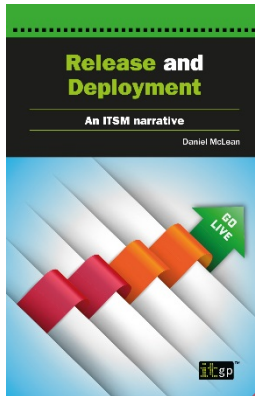
The latest narrative account from ITSM consultant Daniel McLean follows a release and deployment lifecycle, describing common pitfalls and offering helpful advice. Based on real-life experience, the book enables you to learn from expert ITSM practitioners through anecdotal accounts of the release & deployment process, from start to finish.

"Super read, entertaining and informative with some great statements about how things are and/or should be. Cannot wait for the next instalment (or is that Release?)"
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