



Change Management

Process Guide - Executive Summary

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Overview

This Change Management Executive Summary was produced by the Navvia Process Designer and is just one of the many process artifacts that can be produced.

- Other artifacts include:
- Complete Process Document
- SIPOC Diagram
- User Story Documentation
- Technical Design Documentation
- Process Maturity Charts
- and much more...

To learn more visit our website at [Navvia.com](https://navvia.com)

Description

This process straw model is for use as an aid in the design of a full function Change Management process that will meet the needs of your organization. Tailor the process in navvia and quickly produce custom documentation.

Change Management is the process responsible for managing all changes to the Production Operations environment from inception thru completion. To be successful in managing Change, the Change Management process must ensure that all Changes are recorded and authorized at the appropriate level within IT and the Business without being overly bureaucratic. Simple (routine, standard) Changes would need minimal authorization but should still go through the process to ensure they are correctly recorded and appropriately tested. Complicated, high-impact Changes may need to be authorized at the Business Executive level as well as the IT Executive level before the implementation is initiated.

Objectives

Process objectives describe material outcomes that are produced or achieved by the process. The following are the objectives of this process:

- To ensure that all Changes are logged (or captured) in a centralized repository where the information can be shared by other processes.
- To assess all Changes based on their impact, cost, benefit and risk to the business and to approve or decline the Request for Change accordingly.
- To schedule all Changes based on the requirements of the business, the availability of appropriate resources and in consideration of other Changes being deployed.
- To ensure that all Changes are appropriately tested and certified and that the appropriate implementation and remediation plans are available.
- To provide timely communication of Change plans and schedules as well as the status of all Changes to appropriate stakeholders and affected users.
- To provide general reporting capabilities against the repository of Changes, including trending information and specific metrics relevant to the process.
- To provide a systematic approach to control the lifecycle of all changes.
- To facilitate beneficial changes to be made with minimum disruption to IT services.
- To control changes to the Configuration Management Database (CMDB).

Roles

Roles are allocated to work on specific tasks within the process. The responsibilities of a role are confined to the specific process and do not imply any functional standing within the hierarchy of an organization.

The roles for this process are:

| Name | Description |
|-----------|---|
| Requester | <p>The person raising the Change; i.e. the person who wants the Change to take place. This may be a business customer or user or someone within IT. It may also be the actual person requesting the Change.</p> <p>RESPONSIBILITIES:</p> <ul style="list-style-type: none"> - Initiates the Change to start the process. - Generates the business needs, goals, and objectives of the Change. - Provides additional information for the Change as requested throughout the process. - Sets the "priority" based on predefined parameters. - Confirms completion of the Change to enable closure. <p>Note: In the tool, the Requested By is defaulted to the person filling out the Change and it is assumed that this is the person this change is On Behalf Of. If you change the content to someone else, they assume the role of Requester</p> |
| Submitter | <p>The person filling out the Change and submitting (creating) it via the ServiceNow support tool. Provides all the details regarding the Change, including the business justification, implementation plan, CI details, remediation plan, etc. that are to be included in the request.</p> <p>RESPONSIBILITIES:</p> <ul style="list-style-type: none"> - Generates and submits the Change to start the process. - Enters the business needs, goals, and objectives of the Change. - Ensures the risk factors have been assessed and initial priority has been set. - Provides all necessary supporting documentation for the Change <p>Note: In the tool, the Requested By is defaulted to the person filling out the Change and this gets stored internally as Opened By.</p> |
| Assessor | <p>The Assessor role responsibilities include performing a technical assessment of submitted Change Request and return them to the Requester/Submitter if missing information or lacking clarity. The Assessor will also create any additional tasks that must be performed beyond those identified by the Requester. The Assessor may also provide expert input at the CAB meetings.</p> <p>Note: In the tool, the Assessor is defaulted to the Assignment Group entered going into the Assess state. It is handled as an Approval task for that group that is approved or rejected.</p> |

| Name | Description |
|-----------------|---|
| Change Manager | <p>Unlike process managers for the other processes the Change Manager has an active role in the day-to-day activities of the process as well as the responsibility for the day-to-day execution of the process.</p> <p>Specific over-site responsibilities include:</p> <ul style="list-style-type: none"> - Managing the day-to-day activities of the process - Gathering and reporting on process metrics - Tracking compliance to the process - Escalating any issues with the process - Acting as chairperson for process meetings. <p>Additionally, the Change Management-specific responsibilities include:</p> <ul style="list-style-type: none"> - Authorizing the Change Request - Convening & chairing Change Advisory Board (CAB) meetings - Ensuring that the Forward Schedule of Changes (FSC) is current and available - Conducts post-implementation reviews (PIRs) - Final confirmation point for Emergency Change type - Approving and maintaining Standard Change Templates. |
| Change Approver | <p>This is a generic role (may also be referred to as a Change Authority). Depending on the types and levels of approvals/authorizations to be implemented (e.g. Business management, IT management, scheduling, implementation) this role should be split out into separate roles to identify when, in the Change lifecycle, they will be involved.</p> <p>The role is accountable for reviewing the Change to determine the readiness for implementation considering such things as: potential risk associated with implementing (or not implementing) the Change; the scope and benefits that are expected to be realized; the suitability of the remediation plan, completeness of the implementation details; and the planned schedule for the various Change tasks. The role may authorize, reject as not feasible, or return the Change for further information/clarification.</p> <p>Note: In the tool, the Approver is handled as an Approval task for that group or assignee that is approved or rejected.</p> |
| Implementer | <p>Responsible for executing the Change tasks to which they have been assigned. Upon completion, they must update the task with appropriate information and select closure code and/or status. There may be multiple people involved in the implementation for a given Request for Change (RFC) (each assigned their own tasks).</p> <p>This role may also be referred to as Release packaging or deployment practitioner. Responsibilities of this role include the building, testing and physical deployment tasks associated with approved Changes that may be assigned to multiple individuals.</p> <p>Note: In the tool, the Implementer defaults to the Assignee entered. It is handled as an Approval task for that group that is approved or rejected.</p> |

| Name | Description |
|--|---|
| Change Advisory Board (CAB) | <p>Advises or assists the Change Manager with:</p> <ul style="list-style-type: none"> - Approval of high risk, high impact Change Requests - Change implementation scheduling (FSC) - Post-implementation reviews (PIRs) - Approving Change Process Models. <p>Reviewing proposed Standard change templates/models.</p> |
| Emergency Change Advisory Board (ECAB) | <p>Provides advice in the event of a declared Emergency Change. This role is a subset of the full advisory board may be called upon at any hour of the day to approve the Emergency Request for Change.</p> |
| Process Owner | <p>A Senior Manager with the ability and authority to ensure the process is rolled out and used by all departments within the IT organization.</p> <p>Specific responsibilities include:</p> <ul style="list-style-type: none"> - Defining the overall mission of the process - Establishing and communicating the process mission, goals, and objectives to staff - Resolving any cross-functional (departmental) issues - Ensuring consistent execution of the process across departments - Reporting on the effectiveness of the process to senior management - Initiating any process improvement projects. |
| Business Customer | <p>A functional manager or business unit who either purchases, authorizes, or receives the benefit of the IT-enabled Service.</p> |
| Change Coordinator | <p>There may be different people fulfilling this role for each category of Change.</p> <p>Responsible for</p> <ul style="list-style-type: none"> - Reviewing CR(s) to determine approval based on business value, potential risk, and the benefits - Performing a risk and impact assessment of submitted Change Requests - Coordinating the Change build, test, and deployment activities, as appropriate - Participating in the Change review prior to closure. - Providing expert input at the CAB meetings, as needed. <p>Note: In larger organizations, with larger Change volumes, the role of Change Coordinator can be used to balance workload.</p> |
| Release and Deployment Process Manager | <p>This role is included to allow for the contact point with the Release and Deployment Management process.</p> |

RA(S)CI

| Task | Assessor | Business Customer | Change Advisory Board (CAB) | Change Approver | Change Coordinator | Change Manager | Emergency Change Advisory Board (ECAB) | Implementer | Requester | Submitter |
|--|----------|-------------------|-----------------------------|-----------------|--------------------|----------------|--|-------------|-----------|-----------|
| CHG 1.1 Create Normal Change | | | | | | C | | | C | R/A |
| CHG 1.4 Provide Details | | | | | | C | | | C | R/A |
| CHG 1.5 Calculate Risk | | | | | | | | | | R/A |
| CHG 1.6 Perform Collision Detection | | | | | | | | | | R/A |
| CHG 1.7 Submit Change | | | | | | | | | | R/A |
| CHG 2.1 Review Change Request | | | | | | R/A | | | C | C |
| CHG 2.2 Perform Assessment | R | | | | | R/A | | | | |
| CHG 3.1 Authorize Change | | | C | R | | A | C | | | |
| CHG 3.2 Abandon Change | | | | R | | R/A | | | C | C |
| CHG 3.3 Schedule Change | | | C | | | R/A | | | | |
| CHG 4.1 Implement | | | | | | A | | R | C | |
| CHG 4.2 Execute Remediation/Backout | | | | | | A | | R | | |
| CHG 5.1 Conduct PIR | | R | C | | | R/A | | R | R | R |
| CHG 5.2 Verify & Close | | | | | | R/A | | | R | R |
| CHG 1.2.1 Access ESS Portal or Service Catalog | | | | | | | | | | R/A |
| CHG 1.2.2 Select Appropriate Standard Change | | | | | | | | | | R/A |
| CHG 1.2.3 Provide Requested information | | | | | | | | | | R/A |

| Task | Assessor | Business Customer | Change Advisory Board (CAB) | Change Approver | Change Coordinator | Change Manager | Emergency Change Advisory Board (ECAB) | Implementer | Requester | Submitter |
|--|----------|-------------------|-----------------------------|-----------------|--------------------|----------------|--|-------------|-----------|-----------|
| CHG 1.2.4 Perform Collision Detection | | | | | | | | | | R/A |
| CHG 1.2.5 Enter New Date for Change | | | | | | | | | | R/A |
| CHG 1.2.6 Submit Change | | | | | | | | | | R/A |
| CHG 1.2.7 Implement | | | | | | | | R/A | | |
| CHG 1.3.1 Create New Emergency Change | | | | | | | | | | R/A |
| CHG 1.3.2 Document Minimal Implementation Requirements | | | | | | | | | | R/A |
| CHG 1.3.3 Indicate Desired Change Date | | | | | | | | | | R/A |
| CHG 1.3.4 Calculate Risk | | | | | | | | | | R/A |
| CHG 1.3.5 Perform Collision Detection | | | | | | | | | | R/A |
| CHG 1.3.6 Request Approval | | | | | | | | | | R/A |
| CHG 1.3.7 Assess Emergency Change Request | | | | | R | R/A | | | | |
| CHG 1.3.8 Convene ECAB | | | | | | R/A | C | | | |
| CHG 1.3.9 Approve or Reject Emergency Change | | | | | | R/A | C | | | |
| CHG 1.3.10 Coordinate Deployment | | | | | R/A | | | | | |
| CHG 1.3.11 Cancel Emergency Change | | | | | | R/A | | | | |

Process Control

Process Controls represent policies and guiding principles on how the process will operate. They provide direction over the operation of the process and define constraints or boundaries within which the process must operate.

Controls

Controls identify what steps need to be in place to ensure the process is being executed as intended.

| Name | Description |
|---|--|
| BAI06.01 Evaluate, Prioritize and Authorize Change Requests | Evaluate all Requests for Change to determine the impact on business processes and IT services, and to assess whether the Change will adversely affect the operational environment and introduce unacceptable risk. Ensure that Changes are logged, prioritized, categorized, assessed, authorized, planned and scheduled. |
| BAI06.02 Manage Emergency Changes | Carefully manage Emergency Changes to minimize further incidents and make sure the Change is controlled and takes place securely. Verify that Emergency Changes are appropriately assessed and authorized after the Change. |
| BAI06.03 Track and Report Change Status | Maintain a tracking and reporting system to document rejected Changes, communicate the status of approved and in-process Changes, and complete Changes. Make certain that approved Changes are implemented as planned. |
| BAI06.04 Close and Document Changes | Whenever Changes are implemented, update accordingly the solution and user documentation and the procedures affected by the Change. |

Policies

Policies provide an element of governance for the process that provides alignment to business vision, mission and goals. They outline a set of plans or courses of action that are intended to influence and determine decisions or actions within the process.

Here are the relevant policies for this process:

| Post Implementation Review (PIR) | |
|----------------------------------|--|
| Statement: | Each Change record and associated task(s) must be reviewed for success and any identified post-implementation actions will be documented. ***When a Change requires a PIR and the decision criteria must be defined by the client*** |
| Rationale: | To learn from past mistakes and prevent them from reoccurring. |

| Unauthorized Changes | |
|----------------------|---|
| Statement: | There should be a culture of zero tolerance for unauthorized Change. |
| Rationale: | Unauthorized Change may have a negative impact on the production environment. |

| Change Categorization & Prioritization | |
|--|--|
| Statement: | All Changes must be prioritized based on categorization around new development, preventive and corrective Changes. |
| Rationale: | Prioritization allows the Change management process to be responsive to high priority business Changes. |

| Change Windows | |
|-------------------|---|
| Statement: | Establish Change windows and enforce scheduling of Changes along with authorization for exceptions. |
| Rationale: | Change Windows provide a standardized timeframe when Changes can be carefully applied. |

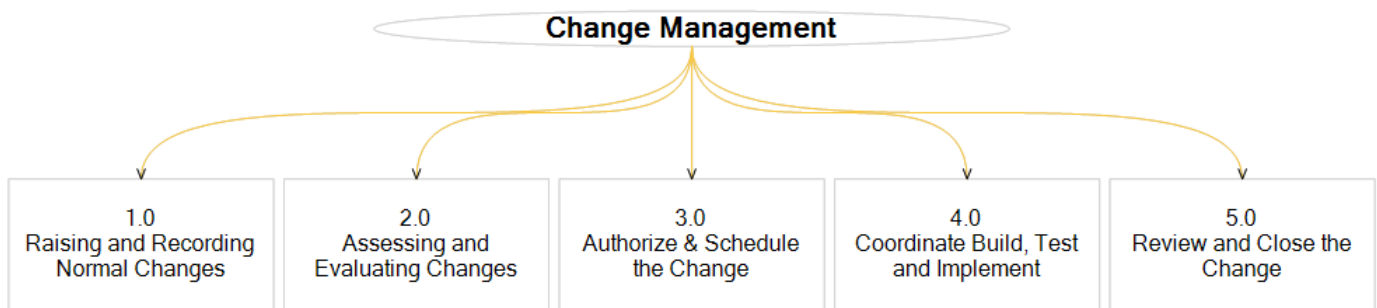
| Risk Assessment | |
|-------------------|--|
| Statement: | All Changes will be assessed for risk and appropriate actions established to mitigate potential incidents. |
| Rationale: | Effective Risk Management will decrease incidents and improve availability to the business users. |

| Logging | |
|-------------------|---|
| Statement: | Each proposed Change requires a Change record and associated task(s) be entered into the ServiceNow enterprise-wide Change Management tool. |
| Rationale: | Every proposed Change needs to be reviewed, authorized, scheduled and implemented to reduce the impact to the users and reduce cost. |

| Lead Time | |
|-------------------|---|
| Statement: | The Change Management process will only accept new Change Requests that follow the lead time policy. ***The Lead Time Policy must be defined by the client*** |
| Rationale: | Advance notice of Change Requests allows the process to ensure Changes are planned out to minimize impact and risk. |

| Approval Policy | |
|-------------------|---|
| Statement: | All Change Requests will be approved based on the defined approval model. *** the Approval Model must be defined by the client*** |
| Rationale: | Consistent, swift approval will enhance process efficiency and performance. |

Level 0



Workflow

The Workflow section identifies the process inputs, outputs, activities and task details along with the general task flow within each activity.

Activities

An activity is a collection of tasks that are related to each other. An activity may also be constructed to support a specific objective of the process.

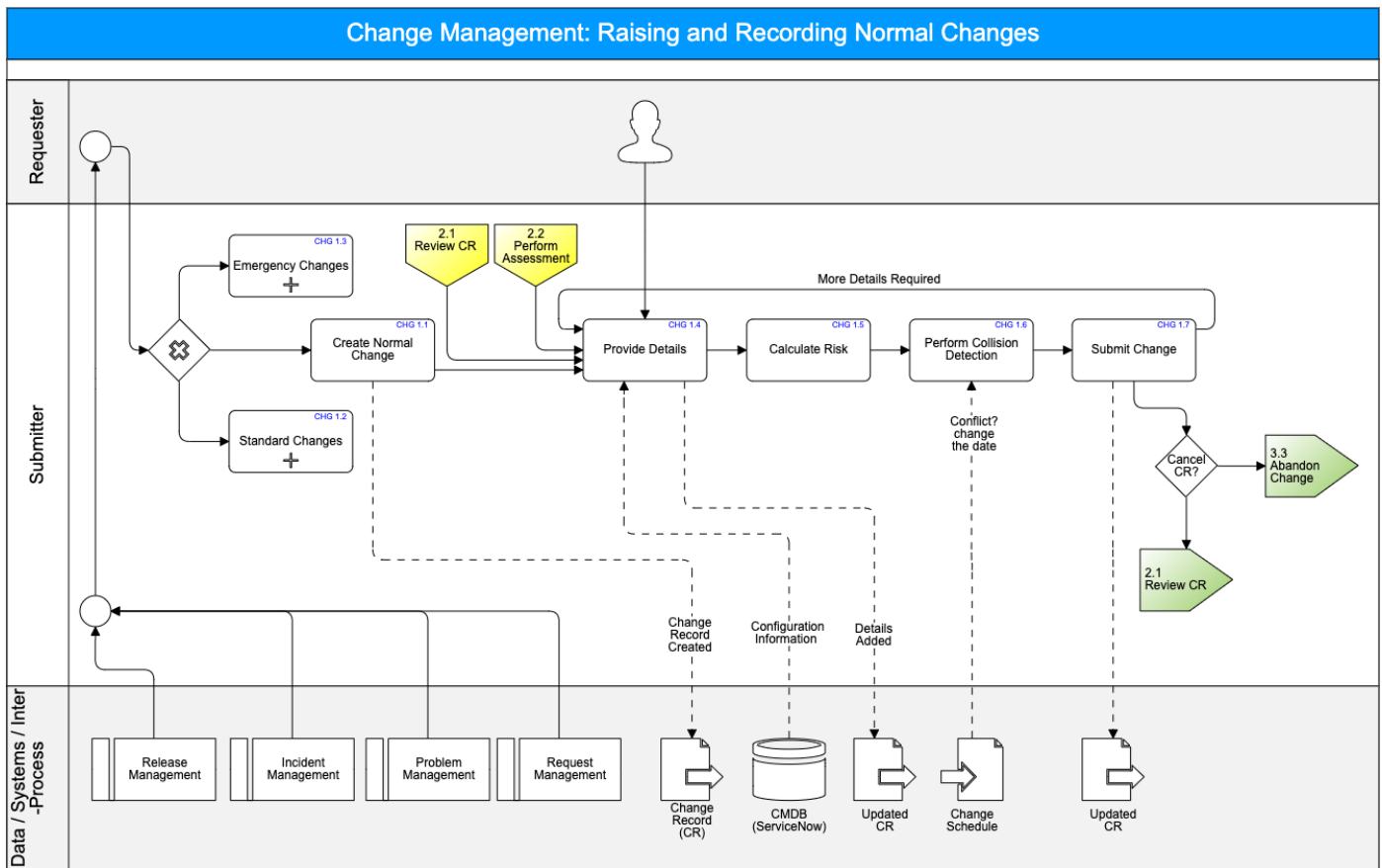
Raising and Recording Normal Changes

During this activity, the Change record is created and all necessary information is captured. Once the information has all been captured, the Change record is submitted for review, assessment, authorization, scheduling, and implementation (the next activities).

Activity RA(S)CI

| Task | Change Manager | Requester | Submitter |
|-------------------------------------|----------------|-----------|-----------|
| CHG 1.1 Create Normal Change | C | C | R/A |
| CHG 1.4 Provide Details | C | C | R/A |
| CHG 1.5 Calculate Risk | | | R/A |
| CHG 1.6 Perform Collision Detection | | | R/A |
| CHG 1.7 Submit Change | | | R/A |

Cross-Functional Flow Diagram



Tasks

CHG 1.1: Create Normal Change

A Change record is created (i.e., captured or logged) in the Change Management system. This task, performed by the Submitter on behalf of the Requester, includes identifying all of the basic information regarding the request. The Change may be the introduction of a modification to or the addition of any item of the IT supported infrastructure including hardware, software, and documentation. Changes may be as simple as a documentation Change, a user access request, or planned maintenance, and as complex as the rollout of a new business application, a project Change proposal, or changes to the overall Service (e.g., the Service definition or the Service Portfolio). Data entered at this point must conform to the published Change Management standards and policies. Since all of the request details may not be known or available at this time, the request should be saved in a draft state.

The defined Change types are Normal, Emergency, and Standard.

CHG 1.2: Standard Changes

Based on policies, some Changes may be handled as "standard" Changes. These pre-approved Changes do not require additional approvals and may or may not require scheduling. They follow a fast-path through the process.

CHG 1.3: Emergency Changes

The Change is first confirmed to, in fact, meet the requirements to be handled as an Emergency Change Request. Once confirmed, the Change Request follows an accelerated path through previously defined activities/tasks.

CHG 1.4: Provide Details

A Change record has been created and the basic information provided. This task will collect additional details such as steps required to ensure that the change is implemented (including testing and preparation). Configuration Items (CIs) that will be changed must be identified and related to the Change. Implementation steps, test plans, and backout plans are also documented. The desired change date is also indicated at this time. The Collision Detector is executed at this point to ensure there are no conflicts. Once all of the necessary information has been provided, the request will be submitted. Until that action is taken, the Change will remain in a new, open state.

CHG 1.5: Calculate Risk

If a risk calculator has been employed, all risk questions must be answered and the Change risk calculated here. Changes must be submitted in accordance with lead time policies.

CHG 1.6: Perform Collision Detection

Detect potential collisions with performing the requested Change at the requested date/time against the defined CI.

CHG 1.7: Submit Change

The purpose of this task is to review the Change details to determine whether the Change is submitted to the Change Management system or sent back to gather more Change details.

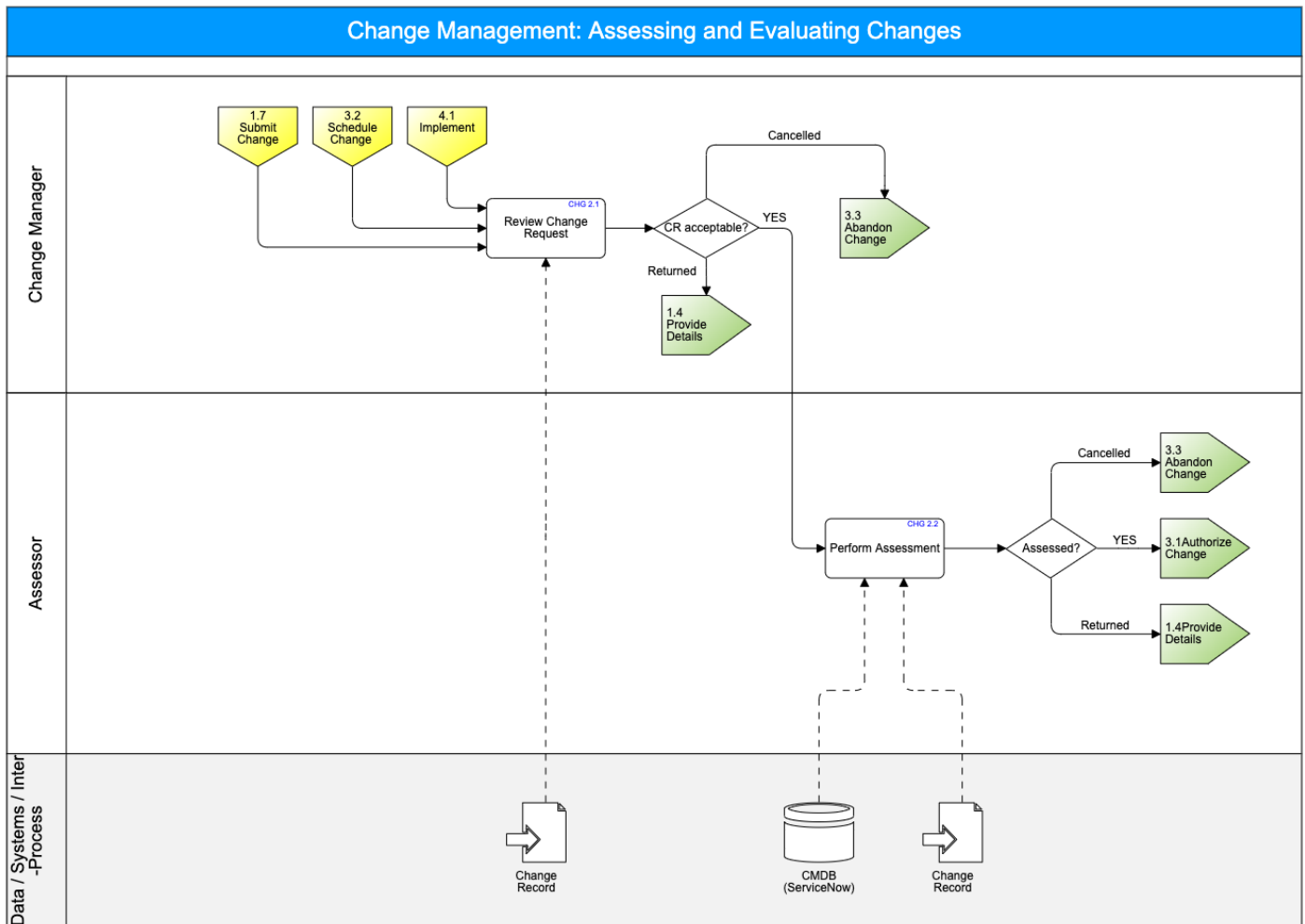
Assessing and Evaluating Changes

Review and Assess the Change record. A filtering step weeds out any unnecessary or impractical Changes.

Activity RA(S)CI

| Task | Assessor | Change Manager | Requester | Submitter |
|-------------------------------|----------|----------------|-----------|-----------|
| CHG 2.1 Review Change Request | | R/A | C | C |
| CHG 2.2 Perform Assessment | R | R/A | | |

Cross-Functional Flow Diagram



Tasks

CHG 2.1: Review Change Request

The purpose of this task is to determine whether the Change is appropriate (referred to as filtering). The Change Manager may determine that the request is impractical or unnecessary. There may already be a Change created that addresses the Change, or the effort and costs involved to implement the Change are not justified. Additionally, the Change Manager may adjust the priority and/or categorization.

CHG 2.2: Perform Assessment

Having been submitted and passed filtering, the Change must now undergo an assessment for accuracy and completeness. It is also during this step that any additional tasks that may be required are added to the Change. If the Assessor is not satisfied with any of the information in the Change, it may be returned to the Requested By. Upon successful completion of this task, the Change is considered to be authorized and may now proceed for required approvals.

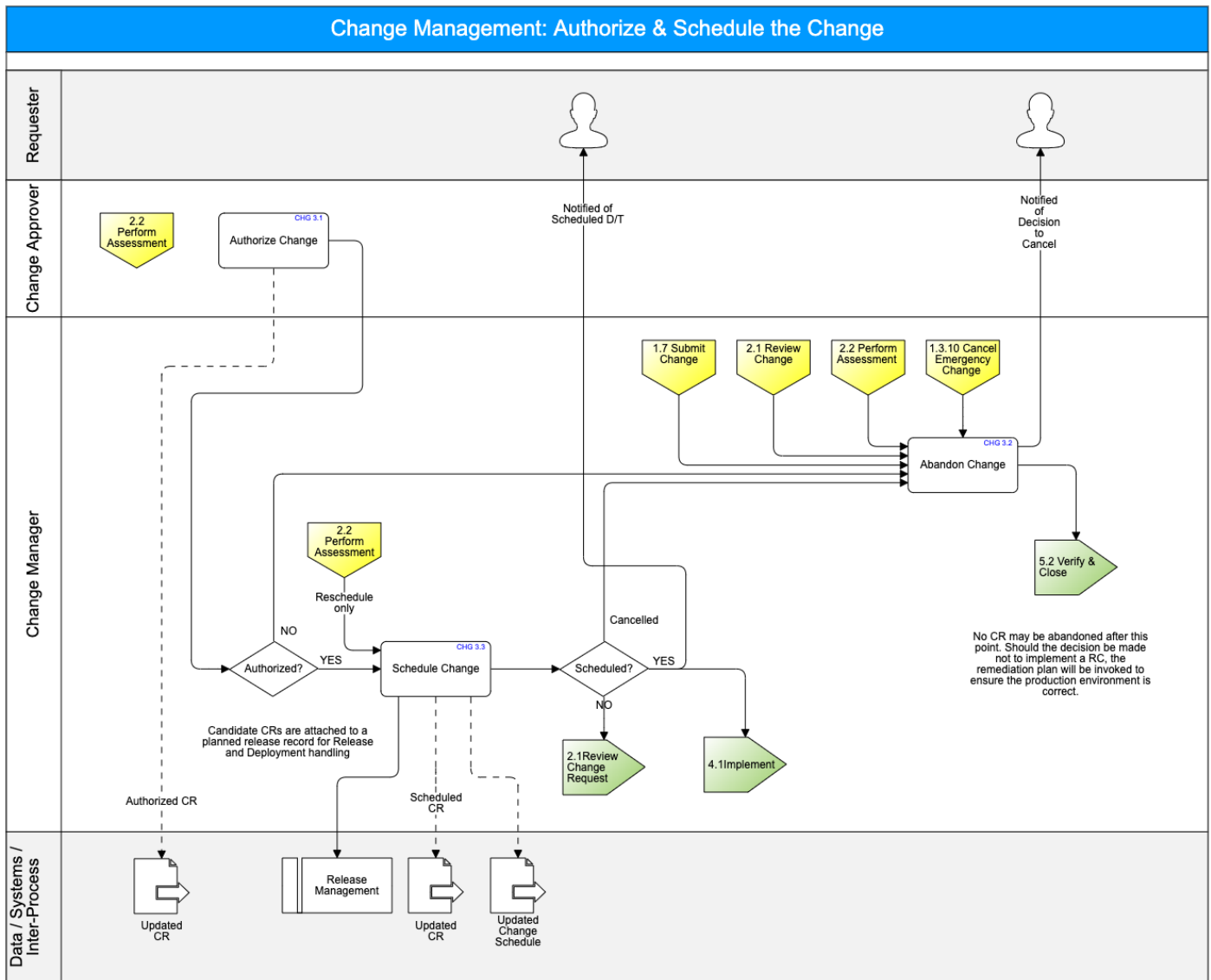
Authorize & Schedule the Change

All necessary approvals must be obtained in order for the Change to proceed. Once approved, the Change is scheduled for implementation.

Activity RA(S)CI

| Task | Change Advisory Board (CAB) | Change Approver | Change Manager | Emergency Change Advisory Board (ECAB) | Requester | Submitter |
|--------------------------|-----------------------------|-----------------|----------------|--|-----------|-----------|
| CHG 3.1 Authorize Change | C | R | A | C | | |
| CHG 3.2 Abandon Change | | R | R/A | | C | C |
| CHG 3.3 Schedule Change | C | | R/A | | | |

Cross-Functional Flow Diagram



Tasks

CHG 3.1: Authorize Change

All remaining approvals will be obtained as part of this task. Depending on the technique adopted for determining approvals. The actual number of approvals required may vary. The Change may be returned to the Requested By if an approver requires additional information or clarification.

CHG 3.2: Abandon Change

This task has been reached because one or more approvers have rejected the Change, it has failed filtering by the Change Manager, or the Requested By has cancelled the request. The reason for abandoning the Change must be captured at this point. Affected parties and stakeholders should be notified.

CHG 3.3: Schedule Change

The Change must be scheduled for implementation. Care should be taken not to schedule Changes without first verifying the availability of resources assigned to those tasks. Similarly, Changes to the schedule should be communicated to all assignees. The Forward Schedule of Changes (FSC) should be consulted and subsequently updated as a result of this step. This activity will also ensure that all necessary requirements are provided to the Release Management process, including the agreed-upon schedule.

Note: The Paris release introduces a new Scheduling Assistant enhancement which provides an improved message to be displayed when the scheduling assistant is unable to identify the next availability. It provides more information on why an availability cannot be found and suggests a duration that will yield availability if the schedule is for a longer duration.

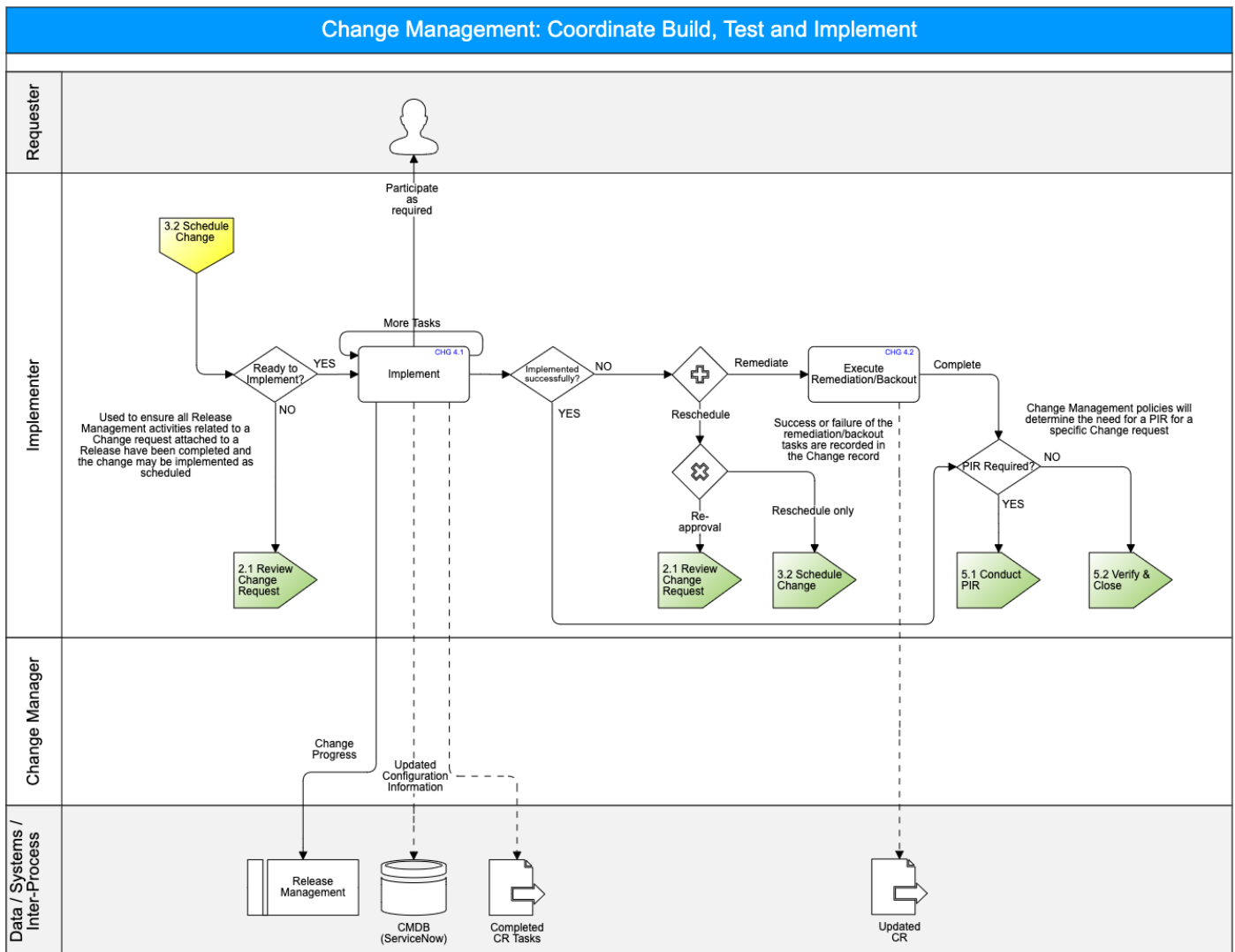
Coordinate Build, Test and Implement

If necessary, an acknowledgement is obtained from Release Management that the Change has undergone and met any testing requirements. The approved implementation tasks are now performed and verified. Remediation (fallback/backout) is implemented if necessary.

Activity RA(S)CI

| Task | Change Manager | Implementer | Requester |
|-------------------------------------|----------------|-------------|-----------|
| CHG 4.1 Implement | A | R | C |
| CHG 4.2 Execute Remediation/Backout | A | R | |

Cross-Functional Flow Diagram



Tasks

CHG 4.1: Implement

The time has arrived! The various tasks that have been scheduled may now be executed. Verification of the task completions must occur as part of this step. Release Management will be updated with the results of the implementation.

CHG 4.2: Execute Remediation/Backout

In the event that the Change is unsuccessful, or is partially implemented and cannot be completed, the Change may need to be backed out. In this case, the approved remediation plan(s) must be followed. If the Change was not successful, a PIR may need to be performed.

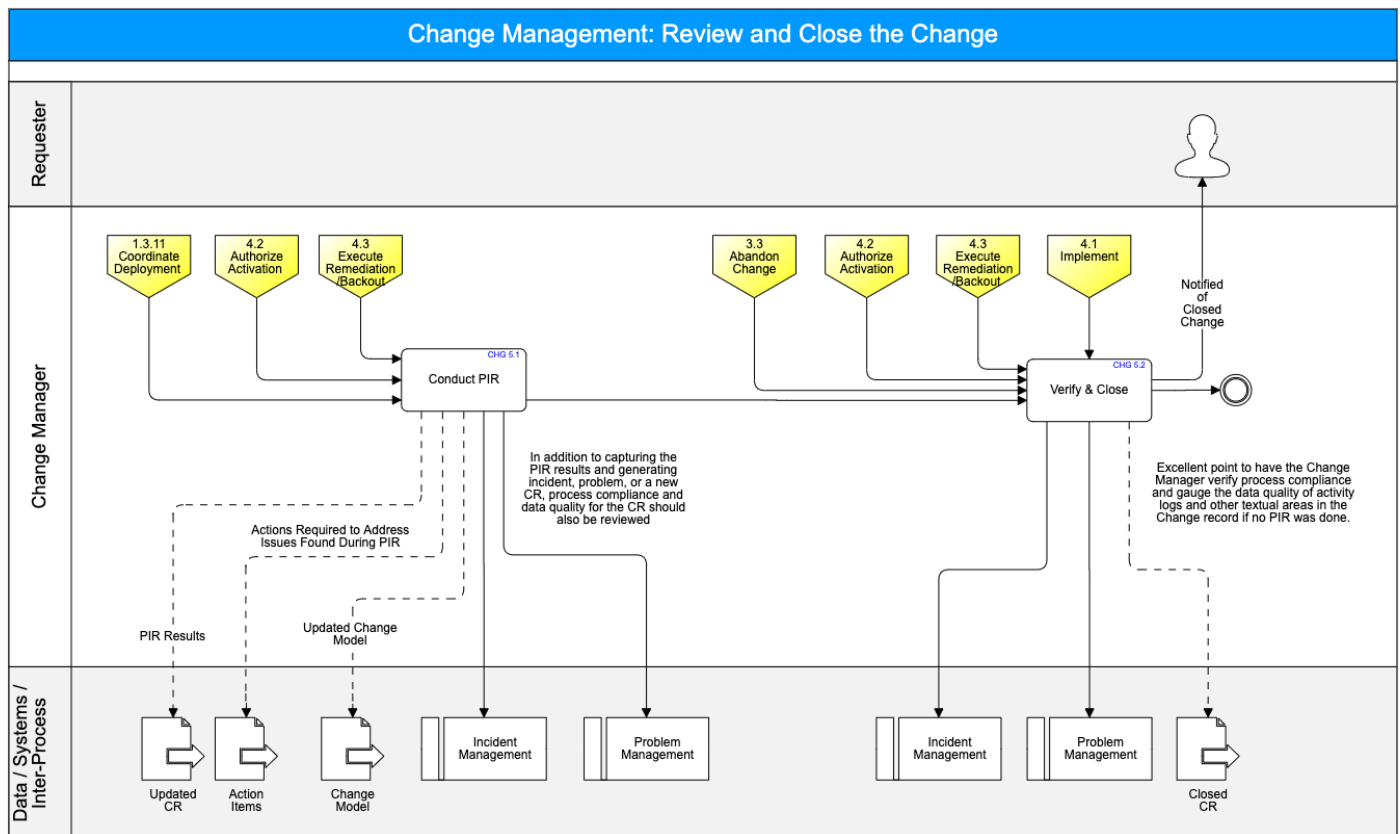
Review and Close the Change

Review and Close the Change record.

Activity RA(S)CI

| Task | Business Customer | Change Advisory Board (CAB) | Change Manager | Implementer | Requester | Submitter |
|------------------------|-------------------|-----------------------------|----------------|-------------|-----------|-----------|
| CHG 5.1 Conduct PIR | R | C | R/A | R | R | R |
| CHG 5.2 Verify & Close | | | R/A | | R | R |

Cross-Functional Flow Diagram



Tasks

CHG 5.1: Conduct PIR

A Post-Implementation Review (PIR) needed. The purpose of this activity is to examine how the Change was handled throughout its entire lifecycle, and whether it produced the desired results. Opportunities to improve the implementation of similar Changes in the future are tabled and action items assigned accordingly. PIRs may be conducted on their own, or as part of the regular Change Advisory Board (CAB) meeting.

CHG 5.2: Verify & Close

This step ensures that all information has been captured in the RFC. An appropriate closure code must be selected based on the results of the Change.

Appendix

Additional documents or information that are related to the process in some manner

Definitions

Definitions for unique terms related to the process that may aid in the understanding of the process and its documentation

| Term | Definition |
|---------------|---|
| Change | A Change is defined as the addition, modification, or removal of anything that could have an impact on an IT service. |
| Change record | The formal document (or screen) containing all information about the requested Change. This is the artifact that will be used during the entire Change lifecycle to record and track progress of the Change throughout the process. |
| Change Types | <p>Normal (comprehensive): The majority of all Changes follow the typical, normal workflow (including authorization and scheduling).</p> <p>Standard (routine): A Change for which authorization has been granted in advance (typically by the Change Manager). Such Changes are typically low risk, are routinely performed and have been implemented without incident in the past; i.e. a good track record. All Routine Changes (Standard Changes) should have a corresponding Change Process Model (or template) from which a new Change record can be created. There should also be defined criteria and policies for the use of a Routine Change (e.g. can only be implemented outside of normal business hours).</p> <p>Emergency (urgent): A Change that must be completed immediately to fix part of the infrastructure that has failed or is about to fail or to satisfy an urgent business need that was not previously known.</p> |
| RASCI Model | <p>The RASCI model is based on the principle that people act in one of five ways when executing a task. It accounts for the fact that more than one role may be active in performing a specific task while clearly defining specific involvement for that role.</p> <p>The actions are:</p> <ul style="list-style-type: none"> R Responsible for the action (may do the task) A Accountable for the action (including authorization/approval) S Support - who provides support during the implementation of the action C Required to be Consulted on the action I Required to be Informed of the action <p>Each role will have only one of the actions associated with it. The sole exception occurs when the role Responsible for a task is also Accountable for the task.</p> <p>Although there may be many roles 'Responsible' for the execution of a task there must be at least one such role for the task.</p> <p>However, only one role may be set as 'Accountable' for the task.</p> |