How do I set up an effective change advisory board?

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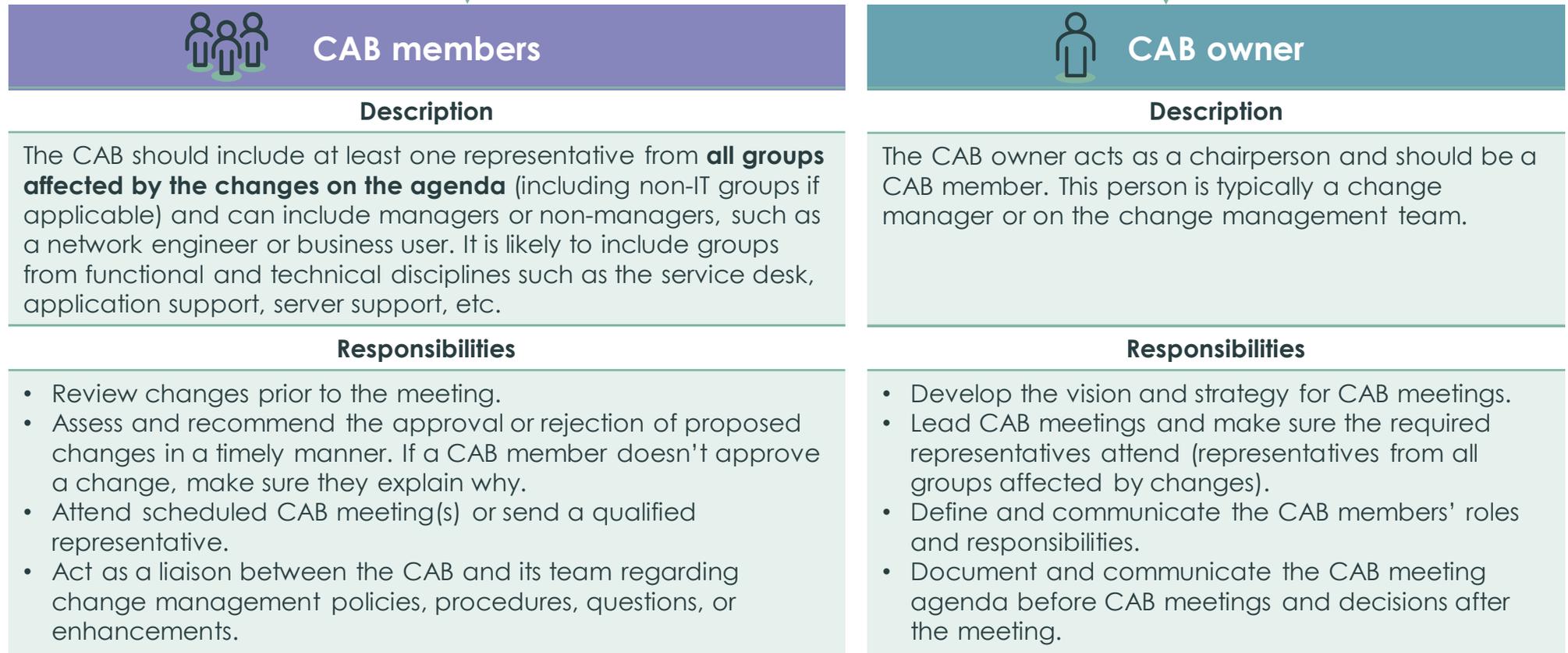- What are the steps to improve my CAB or start a CAB?

What is a change advisory board (CAB)?

A CAB is a group of people who run formal CAB meetings to assess, prioritize, authorize, and schedule changes as part of the change control process.

Do I have all the elements of an effective CAB?

There are two components of a best practice CAB: 1) The right people and 2) An effective CAB meeting structure.

1. The right people

CAB members	CAB owner
Description	**Description**
The CAB should include at least one representative from **all groups affected by the changes on the agenda** (including non-IT groups if applicable) and can include managers or non-managers, such as a network engineer or business user. It is likely to include groups from functional and technical disciplines such as the service desk, application support, server support, etc.	The CAB owner acts as a chairperson and should be a CAB member. This person is typically a change manager or on the change management team.
Responsibilities	**Responsibilities**
• Review changes prior to the meeting. • Assess and recommend the approval or rejection of proposed changes in a timely manner. If a CAB member doesn't approve a change, make sure they explain why. • Attend scheduled CAB meeting(s) or send a qualified representative. • Act as a liaison between the CAB and its team regarding change management policies, procedures, questions, or enhancements.	• Develop the vision and strategy for CAB meetings. • Lead CAB meetings and make sure the required representatives attend (representatives from all groups affected by changes). • Define and communicate the CAB members' roles and responsibilities. • Document and communicate the CAB meeting agenda before CAB meetings and decisions after the meeting.

How do I set up an effective change advisory board? (Continued)

Do I have all the elements of an effective CAB? (Continued)

2. An effective CAB meeting structure

A regular CAB meeting schedule

CABs usually meet once a week or more depending on the changes on the agenda and the business need. For example, DevOps/Agile teams may meet daily; global teams may meet multiple times a week. Try to keep it as consistent as possible.

Practitioner insight: The CAB owner should identify and define continual service improvement items (CSIs) to make sure the CAB is continually supported and effective. This can include quantitative CAB performance data, such as failed changes, or qualitative data such as opinions on efficiency. The CAB owner often does this through reporting analysis and/or surveys.

All required attendees

All teams affected by a change should be represented in the CAB meeting.

A comprehensive meeting agenda

The meeting agenda should include, at a minimum:

➤ All high-risk changes and changes marked as required by the CAB
➤ A review of all failed and backed out changes
➤ Change management process updates
➤ Reviews for each change that include:

- A risk/impact assessment (on the business)
- The effects on the infrastructure and customer service as defined in the SLA as well as on capacity and performance, reliability and resilience, contingency plans, and security
- The impact on other services that run on the same infrastructure (or on software development projects)
- A resource assessment, including the IT, business, and other resources required to implement and validate the change
- The effect, risk, and/or impact of not implementing the change
- Other changes being implemented on the schedule of change
- Technical capability and technical approval required

Why is having an effective CAB important?

A change that goes into production can impact many teams, including management, customers, users, IT, and other departments. If you don't consider all technical impacts of a change, there is a higher risk of a system outage or malfunction. **This makes an effective CAB essential because it provides awareness of the changes for impacted teams and makes sure all technical aspects of a change are considered.**

How do I set up an effective change advisory board? (Continued)

What are the steps to start a CAB or improve my CAB?

1
Assess gaps (if any) in your current CAB.
If you don't have all of the elements of a best practice CAB (people and process), document the gaps to plan remediation. If you don't have a CAB, document who would participate in a CAB and confirm the CAB owner.

2
Get approval to change or improve your CAB (or to create a formal CAB, if it doesn't exist).
Engage your leadership and CAB stakeholders to discuss your gap analysis from the previous step and gain support to improve your CAB. Here's a Community post about the benefits of a CAB, if you need further justification.

3
Confirm the CAB owner.
Identify the CAB owner who will be accountable for CAB owner duties.

4
Confirm the CAB's standard agenda.
CAB meeting agenda items may vary from meeting to meeting, but it's important to create a standard agenda template so the meetings are thorough (based on CAB meeting best practices).

5
Confirm the CAB meeting cadence.
The frequency of CAB meetings can sometimes change based on the change items on the agenda, but still confirm a regular cadence to avoid non-emergency ad hoc occurrences.

6
Host CAB meetings and iterate.
Host a CAB meeting and take notes to improve the efficiency and effectiveness of the processes, and iterate.

Related resources
- Product docs – Managing a CAB meeting with CAB Workbench
- Optimize change management with the ServiceNow Change Management application

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us.