Improving the Health of Your CMDB

Transforming Your CMDB In ServiceNow Into A Trusted Compass

Christine Morris, Chris Padmore, Madan Raja, & Steven Socha | June 26, 2024

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Agenda

1. Welcome & Introduction

2. The Value of a Healthy CMDB

3. Improving Your CMDB Health

![Cask logo] Cask

Crafting exceptional experiences to make the difficult easy for clients

13+ Years ServiceNow Partner

11 Product Line Achievements

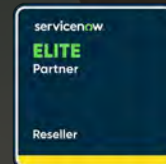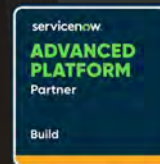**900+** Certifications & Accreditations

4.62 CSAT Leading ServiceNow Partner

150+ Apps Built on ServiceNow

6 Offerings Built with ServiceNow

servicenow
ELITE
Partner

Consulting & Implementation

servicenow
ADVANCED PLATFORM
Partner

Build

servicenow
ELITE
Partner

Reseller

Inc. 5000
Best Workplaces

AMERICA'S FASTEST-GROWING
Inc. 5000
PRIVATE COMPANIES

Cask is the only pure play ServiceNow partner with dedicated, fully certified practices across the platform.

IT SERVICE MANAGEMENT

IT OPERATIONS MANAGEMENT

IT ASSET MANAGEMENT

STRATEGIC PORTFOLIO MANAGEMENT

EMPLOYEE WORKFLOW

CUSTOMER WORKFLOW

SECURITY & RISK

APP ENGINE

STRATEGY	TRANSFORMATION	IMPLEMENTATION & APP DEVELOPMENT	OPERATIONS & ENHANCEMENT
Strategic Roadmapping	App Modernization	Product Implementation	Continuous Cloud Innovation
Advisory Consulting	UX & UI Design	Platform Engineering	Platform Architecture & Engineering
Platform Strategy & Governance	Product Management	Data Management & Integrations	Functional Process Execution
Demand Management	Org Change Management	App Development	Cask Reserve
	Testing & Quality Engineering		
	Program & Project Management		
	Agile Transformation w/SAFe		

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Introductions

Madan Raja
Director, Delivery
Cask

Steve Socha
Configuration
Management Architect,
AES

Christine Morris
Director, Platform &
Service Management,
Cask

Chris Padmore
Solutions Architect,
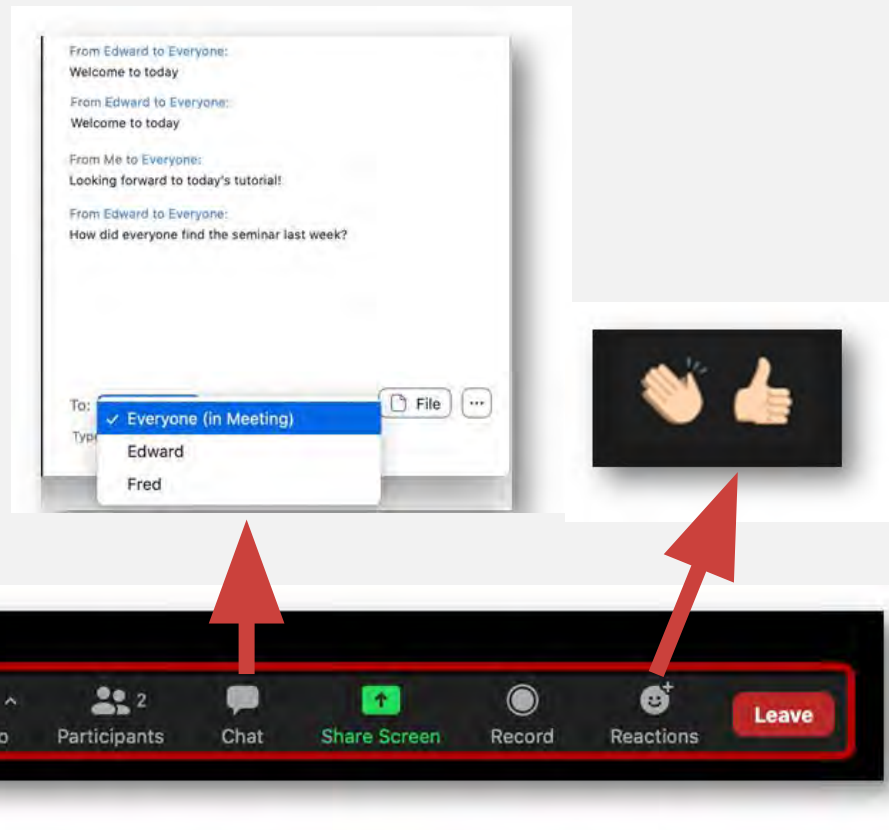ITOM Practice Lead,
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Join the Conversation: Using Zoom

Turn on Video – Let's get interactive and enjoy ourselves

Unmute – Click the microphone icon to unmute and participate
Chat – Message everyone or just one person
Get Help – Use Chat

From Edward to Everyone:
Welcome to today

From Edward to Everyone:
Welcome to today

From Me to Everyone:
Looking forward to today's tutorial!

From Edward to Everyone:
How did everyone find the seminar last week?

To: ✓ Everyone (in Meeting)   📄 File   ⋯
Typ   Edward
      Fred

👏 👍

🎤 ∧   📹 ∧   👥 2   💬   ⬆️   ⚪   😊⁺   **Leave**
Mute   Stop Video   Participants   Chat   Share Screen   Record   Reactions

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STRATEGY, SECURITY, VISIBILITY, ACCURACY

Part 1: Value of a Trusted CMDB

Sound Familiar?

"We need to implement CMDB."

"Is our CMDB good?"

"If we only had a CMDB…."

"Is our CMDB done yet?"

"How many CMDBs do we have?"

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The Enterprise Impact of a Strong CMDB

IT Operations Management
Prioritize response based on business impact

Cloud
Gain visibility of cloud resources & align spend to business initiatives

DevOps
Ensure governance and traceability of CI/CD process

Risk
Align technology risks to the business

IT Asset Management
Gain visibility of hardware and software across your operational estate

Security
Prioritize response based on business impact

IT Service Management
Increase efficiency and reduce risk when planning changes

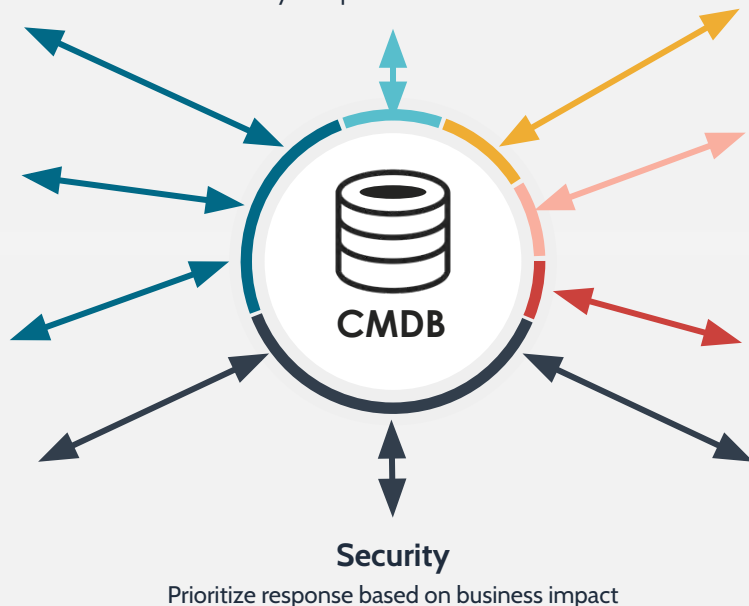**Application Portfolio Management**
Streamline build out of Application portfolio

Customer Service Management
Prioritize response based on customer impact

Certificate Management / Firewall Workflows
Eliminate outages due to expired certificates / misconfigured firewall policies

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Benefits of a Trusted CMDB

1

Strategy

A trusted CMDB provides the data necessary to understand the capabilities and capacity of the organization to allow for more informed decisions. With CMDB data connected to business and IT, leaders have a holistic view of their organization.

2

Security

A complete and connected CMDB can provide insight and understanding of the issues and risk that exist and the potential business impact allowing an organization to prioritize resources.

3

Visibility

A CMDB that includes relationships between business applications and the supporting applications and infrastructure help to ensure that work is focused and prioritized based on what drives value for the business.

4

Accuracy

A CMDB that is complete and contains accurate data allows for nearly unlimited opportunities to improve the efficiency of the IT organization.

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Configuration Management Reality Check

You need to address the **Process, People and Technology** issues related to the health of a CMDB.

You must do more than a 'quick fix' of technology, you must address the issues that will allow you to **keep** your CMDB healthy.

TECHNOLOGY
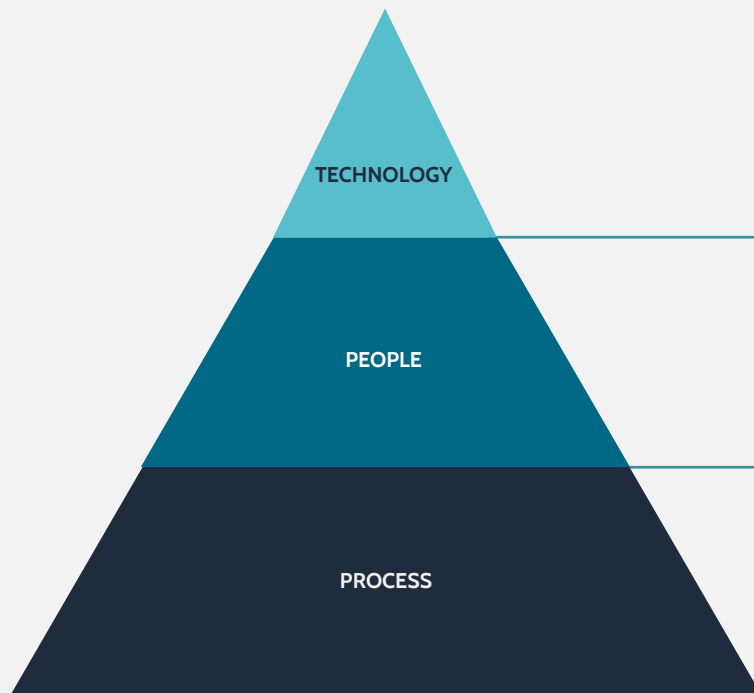
PEOPLE

PROCESS

TECHNOLOGY accounts for approximately 20% of the issues found with CMDB quality.

PEOPLE aspects account for approximately 30% of the issues found with CMDB quality.

PROCESS drives approximately 50% of the issues found with CMDB quality.

CASE STUDY

AES CMDB Journey

A chance to rebuild for AES

AES is a global utility company providing power and innovative energy solutions in over 15 countries.

Replatforming efforts began last November with **Cask** as a partner.

As a reimplementation, this project required a redesign of an old ServiceNow instance hampered by customizations and technical debt. This also meant key features of maturity had to be preserved or redesigned:

- Multiple languages supported at launch
- Full parity with existing Service Catalog scope
- Improved identity management (licensing, group memberships)
- Customized integrations migrated into new instances

Views expressed are based on personal experience and expertise and do not represent any official stance of AES or its subsidiaries.
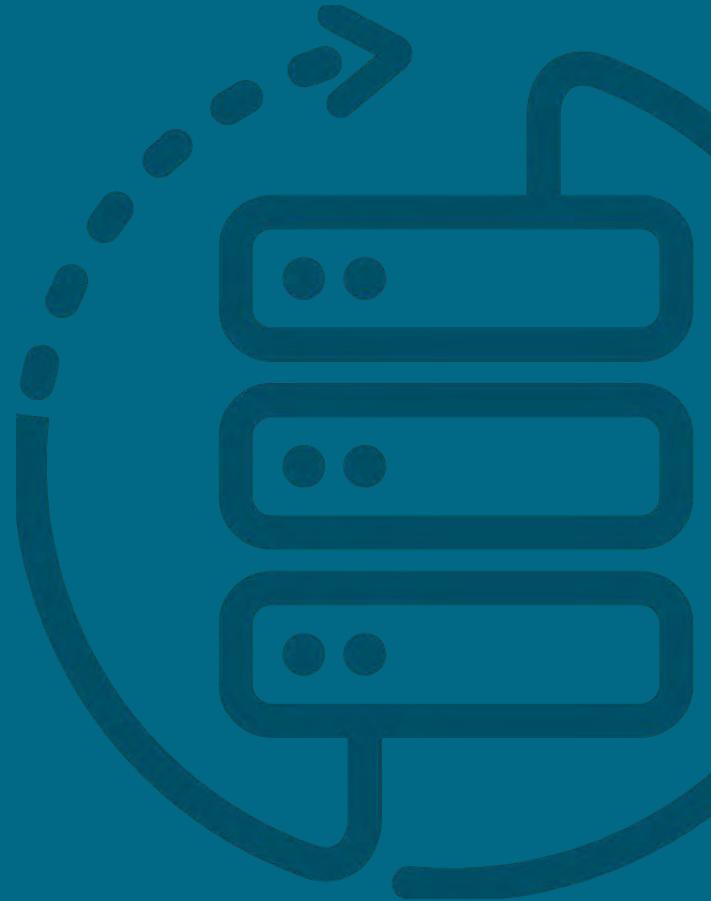
Current Crawl-phase CMDB Milestones

- Revamp feeds for **Core Data** tables

- Expand **CMDB** scope through Discovery, Service Graph connectors, and Health efforts

- Get immediate value through **ITAM**

- Use CMDB tables on Day 1 in **ITSM**
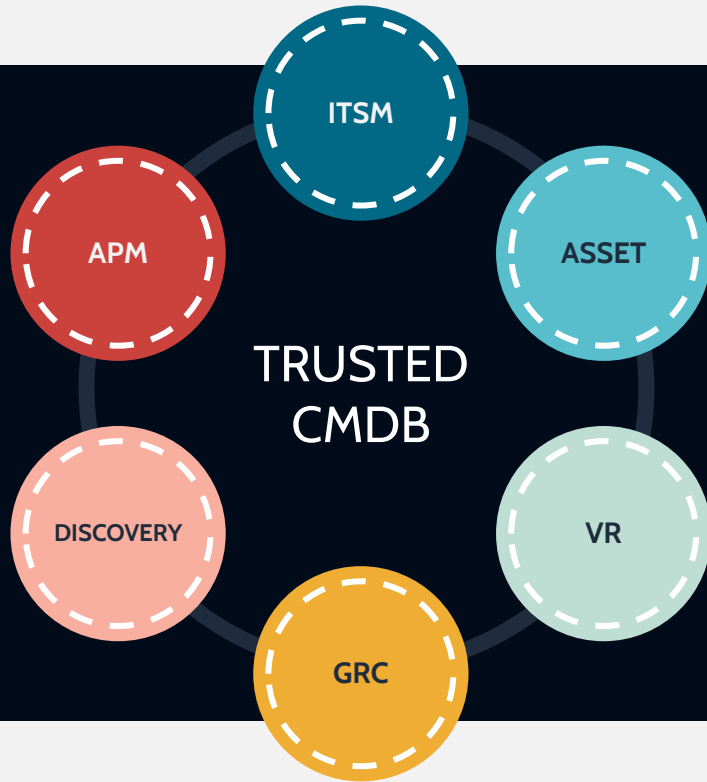
- Incorporate existing **APM** data + process

DEFINITION | GOVERNANCE | COMPLIANCE

Part 2: CMDB & Process

Think About All Of Your Consumers

ITSM

ASSET

APM

TRUSTED CMDB

VR

DISCOVERY

GRC

- Think through process(es) for each scenario / consumer

- A healthy CMDB is always evolving; never complete

- Common Services Data Model (CSDM)

- Be ready for increased demand

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Enabling An Integrated CMDB

ITSM

Incident tickets can be prioritized based on the importance of the affected service.

Incident tickets can be automatically routed to the appropriate support team, reducing MTTR.

Determination of root cause can be completed more quickly and accurately with a Service Map that is able to highlight the offending CI.

A CMDB with relationships can provide an accurate, automated assessment of the risk associated with a change and help identify change conflicts which can help avoid outages due to change.

ASSET

A CMDB with relationships, can greatly enhance hardware and software asset monitoring and tracking. Especially during the Move, Add, Change lifecycle process.

VR

A CMDB that has relationships and data about CIs can help to understand which vulnerabilities create the most risk for the organization to allow for prioritization of action.

Risk Management

CIs can be appropriately controlled and assessed for risk.

Indicators that continuously monitor CI attributes can raise compliance issues for remediation.

APM

An understanding of the operational components and performance of the service provide insight to the lifecycle management of applications.

DISCOVERY

Proper setup and identification of appropriate classes can ensure that the data is going to the right place to be used for other things/processes
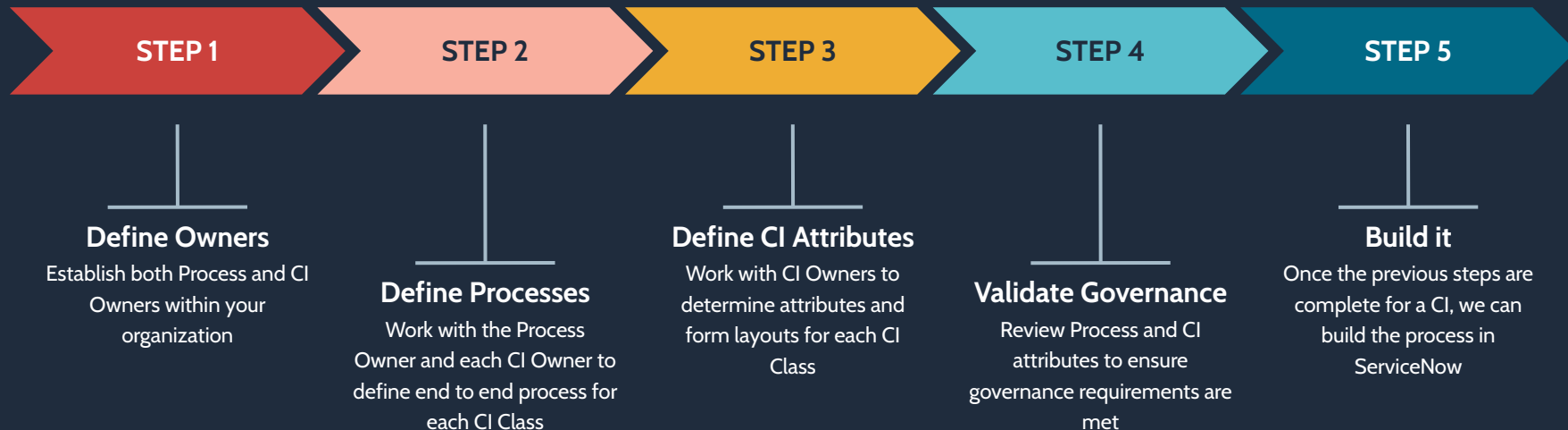
Ensuring proper credentials and access to the devices being discovered will ensure that you are capturing the right things and avoiding duplication.

TRUSTED CMDB

ITSM
ASSET
VR
GRC
DISCOVERY
APM

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Where Are You Today?

Process maturity map as it applies to CMDB

Level 1

Performed Process

Level 2

Managed Process

Level 3

Established Process

Level 4

Predictable Process

Level 5

Ongoing Process Optimization

Process Design Roadmap

STEP 1   **STEP 2**   **STEP 3**   **STEP 4**   **STEP 5**

Define Owners
Establish both Process and CI Owners within your organization

Define Processes
Work with the Process Owner and each CI Owner to define end to end process for each CI Class

Define CI Attributes
Work with CI Owners to determine attributes and form layouts for each CI Class

Validate Governance
Review Process and CI attributes to ensure governance requirements are met

Build it
Once the previous steps are complete for a CI, we can build the process in ServiceNow

ROLES | RESPONSIBILITY | OWNERSHIP

Part 3: CMDB & People

Personas and Roles

Might be same person

Configuration Process Owner

Owns the Configuration Mgmt. Process

Configuration Manager

Responsible for day-to-day facilitation of the Configuration Mgmt. Process

CMDB Admin

Maintains the Health of the CMDB, administrates the CMDB

CI Analyst(s)

Manages assigned CI tables. Keeps records updated and resolves tasks related to CMDB records.

Service or Product Owner

Person(s) accountable for managing all assigned services and related offerings

Ownership Of CI Record

Why is the CI Owner the best person to be responsible for the completeness, correctness and currency of CI Records?

They have the best knowledge of what exists and can confirm if the CMDB is complete.

They have the best knowledge of the data values for each attribute as they can access the actual CI.

They know when data should be changed and can ensure that the CI Record accurately represents the configuration item.

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Thoughts On People Aspects Of CMDB

1 — The Configuration Management Process Owner needs to own the process - not the data.

2 — Ownership for the Completeness, Correctness and Currency of the data within the CMDB to be needs with the CI Owner.

3 — Each role in your Configuration Management process needs to understand and accept their role in the process.

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CONFIGURATION | INTEGRATION

Part 4: CMDB & Technology

Technology

Leverage technology available to drive the accuracy of your CMDB data

Use integrations with other available data sources to create, populate and update Configuration Items.

Use ServiceNow Discovery to create and update Configuration Items.

Leverage the CMDB Dashboard to track the completeness, compliance and correctness of your CI data.

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Leverage The Power Of The Platform

Don't move from a free spreadsheet to an expensive spreadsheet ServiceNow.
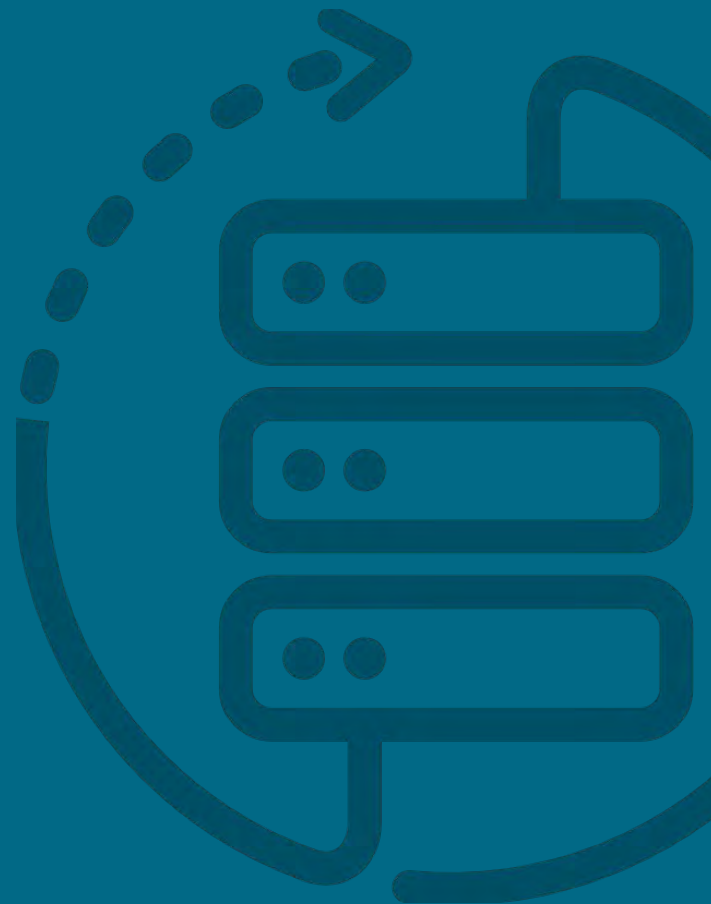
Alerting

Reports

Dashboard

Automation

Part 5: CMDB & Data

Types Of Data / CI Attributes / Relationships

Fixed	
Managed	
Controlled	
Referential	

FIXED DATA

Data about an Asset or Configuration Item that will not ever change.

. . . .

Examples: Manufacturer, Purchase Date, Serial Number

DIRECTION

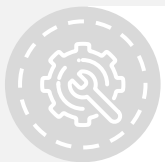Populate once and leave it alone.

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Types Of Data / CI Attributes / Relationships

Fixed

Managed

Controlled

Referential

MANAGED DATA

Data that is only modified when an approved Change Record is executed.

. . . .

Examples: Operating system, patch level, version

DIRECTION

Ensure that your Change Policy defines what CI Classes are Managed.

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Types Of Data / CI Attributes / Relationships

Fixed

Managed

Controlled

Referential

CONTROLLED DATA

Data that can be updated via automation directly from a trusted source.

. . . .

Examples: DHCP IP, Cluster

DIRECTION

Create integration to ensure automated update of CI data to improve accuracy.
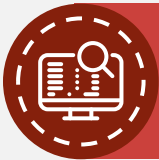
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Types Of Data / CI Attributes / Relationships

Fixed

Managed

Controlled

Referential

REFERENTIAL DATA

Data that can be updated without a Change Record.

. . . .

Examples: CI Owner, Support Team

DIRECTION

Ensure that you know what Referential data is mandatory and include in your CMDB audit.

Tips For Maintaining Healthy CMDB Data

AUTOMATION — The more data that can be populated the better off you will be.

OWNERSHIP — Ensure that CI Owners understand and accept their responsibility for their data.

CONSOLIDATION — If a CI Owner manages a piece of data on a spreadsheet, add it to the CMDB. Enable them to manage all of their data within one platform.
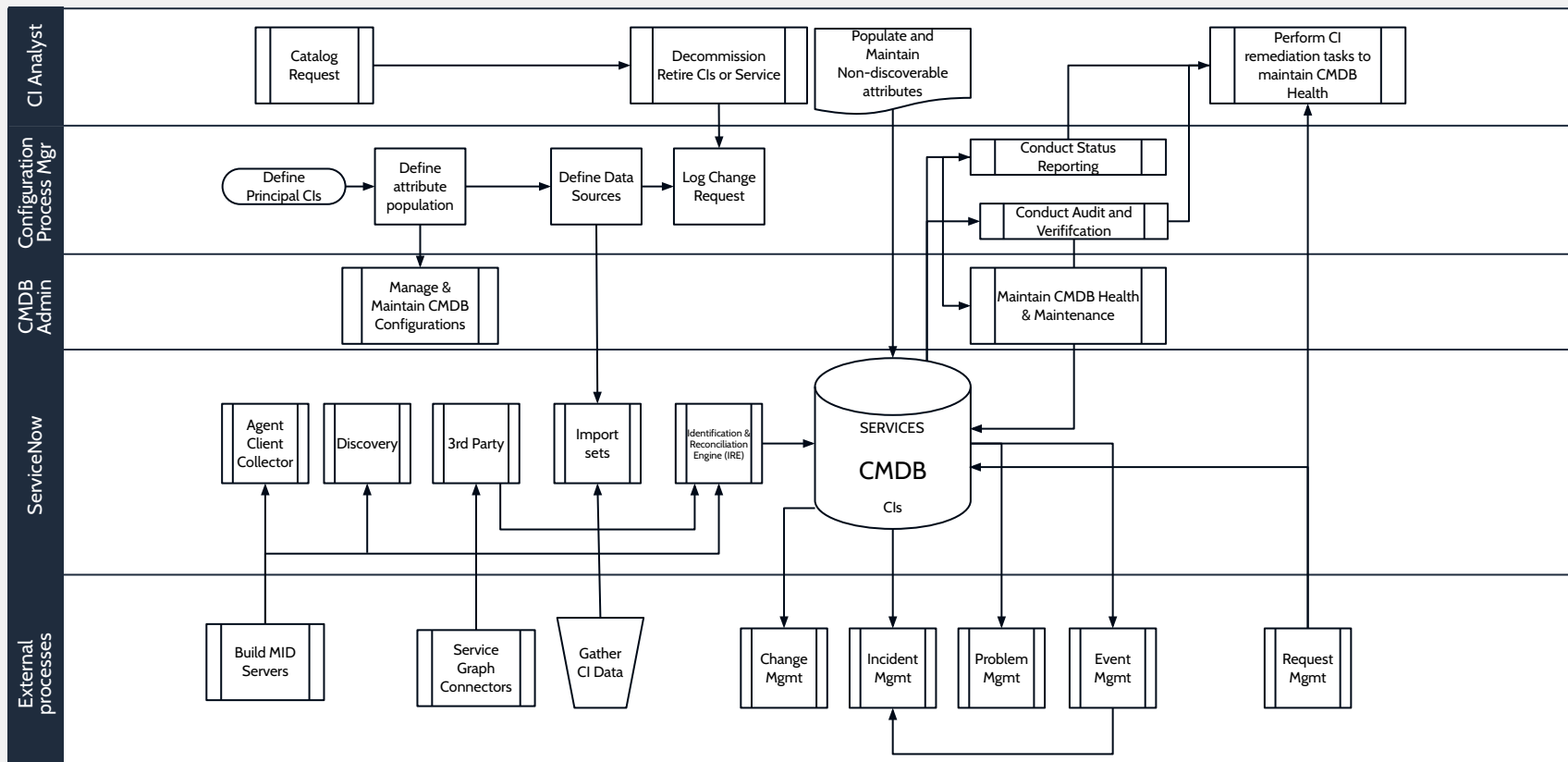
PERFECTION ISN'T THE GOAL — There will always be some level of imperfection in the CMDB data as not everything can be automated.

GOVERNANCE — Maintain metrics and report on the process, the data and the benefits derived.

Configuration Management Process Overview

Summary

Getting Started Is Easy!

Cask meets you where your CMDB is today

Need a quick CMDB assessment and rapid remediation? ▶	**CMDB** LAUNCHPAD
Need help managing your CMDB on an ongoing basis? ▶	**CMDB** EXPERT ASSIST
Need to get your CMDB ready to support asset management? ▶	**SAM-READY** CMDB
Need to implement or overhaul ITOM including your CMDB? ▶	**IT OPERATIONS MANAGEMENT** ESSENTIALS

Cask | CMDB FOUNDATIONS CLASS

WEBINAR
Kickoff the Summer with a Refreshed CMDB

13 JUN
9 am CT

REGISTER TODAY! ▶

LOOK FOR INSTALLMENT TWO COMING NEXT MONTH

(!)

Tell us what CMDB topics you want to learn more about!

· ·

Look for a survey following this session!

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Thank you!

Questions?