**[CUSTOMER NAME]** RELEASE AND DEPLOYMENT POLICY

<table>
<thead>
<tr>
<th>Code:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Version:</td>
<td></td>
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<tr>
<td>Date of version:</td>
<td></td>
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<tr>
<td>Created by:</td>
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<td>Approved by:</td>
<td></td>
</tr>
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<td>Confidentiality level:</td>
<td></td>
</tr>
</tbody>
</table>

**Comment [BV1]:** All fields in this document marked by square brackets [] must be filled in.

**Comment [BV2]:** Every customer has its own release and deployment policy. Insert customer’s name here. The word “Customer” in document name should be replaced with customer’s name. Ensure that this policy forms an integral part of customer’s SLA either as one of the SLA’s sections or as a stand-alone appendix of the SLA. Release and deployment policy can be made on the service basis as well.

**Comment [BV3]:** The document coding system should be in line with the organization’s existing system for document coding; in case such a system is not in place, this line may be deleted.
Change history

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Created by</th>
<th>Description of change</th>
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<tr>
<td>xx/xx/2013</td>
<td>0.1</td>
<td>Branimir Valentic</td>
<td>Basic document template</td>
</tr>
</tbody>
</table>

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1. Purpose, scope and users

The purpose of this policy is to ensure that releases provided by [organization name] for [customer name] are planned, built, tested and deployed through an established process.

This policy applies to all [company name] full-time, part-time and contracted employees, vendors and suppliers involved in release and deployment activities within [company name].

Users of this document are employees of [IT service management organization] and [role description of customer representative].

2. Reference documents

- Release and Deployment Management Process
- Service Level Management Process
- Change Management Process

3. Policy

3.1. Release and Deployment Manager

[role description] is assigned the role of Release and Deployment Manager for [customer name].

Responsibilities of Release and Deployment Manager:

- Overall responsibility for carrying out activities within the scope of Release and Deployment Management for [customer name].
- Responsible for reporting, Planning and coordinating [organization name] resources needed to build, test and deploy each release.
- Ensures that deployment plan of new or changed service, as well as acceptance criteria, are agreed to with [customer name].
- Ensures that change authorization is given before any activity that requires one.
- Takes over responsibility for unsuccessful releases, investigation and definition, i.e. implementation of corrective measures.
- Releases monitoring, measurement and analysis of respective results.
- Defines opportunities for improvement.

3.2. Release unit and release package

The release unit is a part of a service or infrastructure that is released as a single entity.

The release package (referred to as “release”) is a set of Configuration Items (CIs), i.e. one or more release units that will be built, tested and deployed together as a single release.
[role description] is responsible to define release units and releases.

[customer name] defines a release as follows:

<table>
<thead>
<tr>
<th>Service</th>
<th>Release Type</th>
<th>Frequency</th>
<th>Release window</th>
<th>Deployment method</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERP</td>
<td>Major</td>
<td>E_1</td>
<td>As available from vendor</td>
<td>Mon-Wed; 11PM – 05 AM</td>
</tr>
<tr>
<td></td>
<td>E_1.1</td>
<td></td>
<td></td>
<td>Phased, Automation, Push</td>
</tr>
<tr>
<td>ERP</td>
<td>Emergency</td>
<td>E_1.1.1</td>
<td>As required</td>
<td>Immediately</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERP -</td>
<td>Major</td>
<td>E_F_1</td>
<td></td>
<td>Weekends, except last 5 and first 3 days of the month</td>
</tr>
<tr>
<td></td>
<td>Minor</td>
<td>E_F_1.1</td>
<td>Monthly</td>
<td>Phased, Push, Automation</td>
</tr>
<tr>
<td></td>
<td>Emergency</td>
<td>E_F_1.1.1</td>
<td>As required</td>
<td>Big-Bang, Push, Automation</td>
</tr>
</tbody>
</table>

3.3. Deployment options

The release and deployment process and options are managed by:

- [customer name] – [role description] manages all release and deployment activities

Deployment options include:

- Deployment method, frequency and type of releases

[customer name] uses the following release types:

- Major release – a large number of new functionalities are implemented. Such releases often require significant updates for core and support teams, and must always be tested, planned and implemented in stages. [role description] is responsible for major release implementation, and [Change Manager] for authorization.

- Minor release – small enhancements and fixes are implemented. Such release replaces emergency releases. [role description] is responsible for major release implementation, and [Change Manager] for authorization.

[customer name] uses the following deployment methodologies:

1. Big-Bang: Service is deployed to all users at the same time. "Phased deployment": Service is deployed to smaller groups of users and the users are spread out gradually and according to the business need and to other groups of users.
2. Push (service is deployed to users automatically, i.e. without user intervention) vs. Pull (user start deployment at their own convenience)

Comment [BV6]: This is an example. Create this table according to your own services and service assets, i.e. components.

Comment [BV7]: This is either someone from RDM, like Release and Deployment Manager.

Comment [BV8]: Delete if some of the they exist.

Comment [BV9]: e.g. Release and Deployment Manager, Service Level Manager, Project Manager.

Comment [BV10]: e.g. Release and Deployment Manager.

Comment [BV11]: It could also be someone from the business process.

Comment [BV12]: e.g. Change Manager, Release and Deployment Manager, Service Level Manager, Project Manager.

Comment [BV13]: This best practice can be defined on a service level.
3. **Automation (tools are used to improve deployment speed and efficiency) vs. Manual (manual tasks are used to deploy service) methods.**

Deployment of releases are followed by Deployment Planning see Release and Deployment Planning in Appendix. [role description] is responsible to agree with [customer name] on a Deployment plan for every release.

[role description] is responsible to agree with [customer name responsible] on acceptance criteria and enter them into Release and Deployment Planning; see Appendix

CIs which are developed or changed during the (see Service Asset and Configuration Management Process document).

4. **Validity and document management**

This document is valid as of [date].

Owner of this document is [job title], who must least once a year.

5. **Appendices**

- Appendix 1: Release Planning template

  Confirmed by [customer name]

  [job title]

  [name]

  [signature]

  [job title]

  [name]