

Process Assessment

Conducting a Process Maturity Assessment

Brought to you by:



Welcome to the Training

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Assessment Stage

Introduction

- The Navvia Methodology

- An Approach towards Implementation

- Goals and Objectives

 - Assessment Scope

- Value of an Assessment

- Assessment Approach

 - Assessment Activities

 - Assessment Deliverables

 - Assessment Techniques

Planning and Preparation for the Assessment

Conducting the Assessment (up to the Analysis stage)



Course Objectives

Be able to properly explain the value of an Assessment

Understand the Activities, Deliverables and Techniques of Assessment

Learn how to Plan for an Assessment

Learn how to Conduct an Assessment

Learn how to Analyze Assessment data

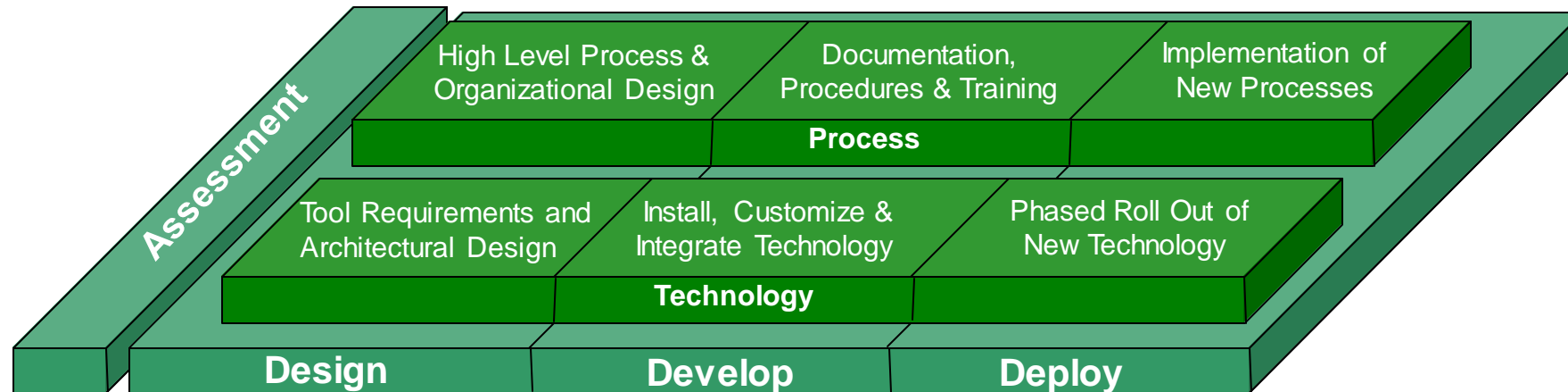
Learn how to Validate Assessment results

Learn how to Present Assessment results

This is not a training session in the use of the Navvia Survey tool



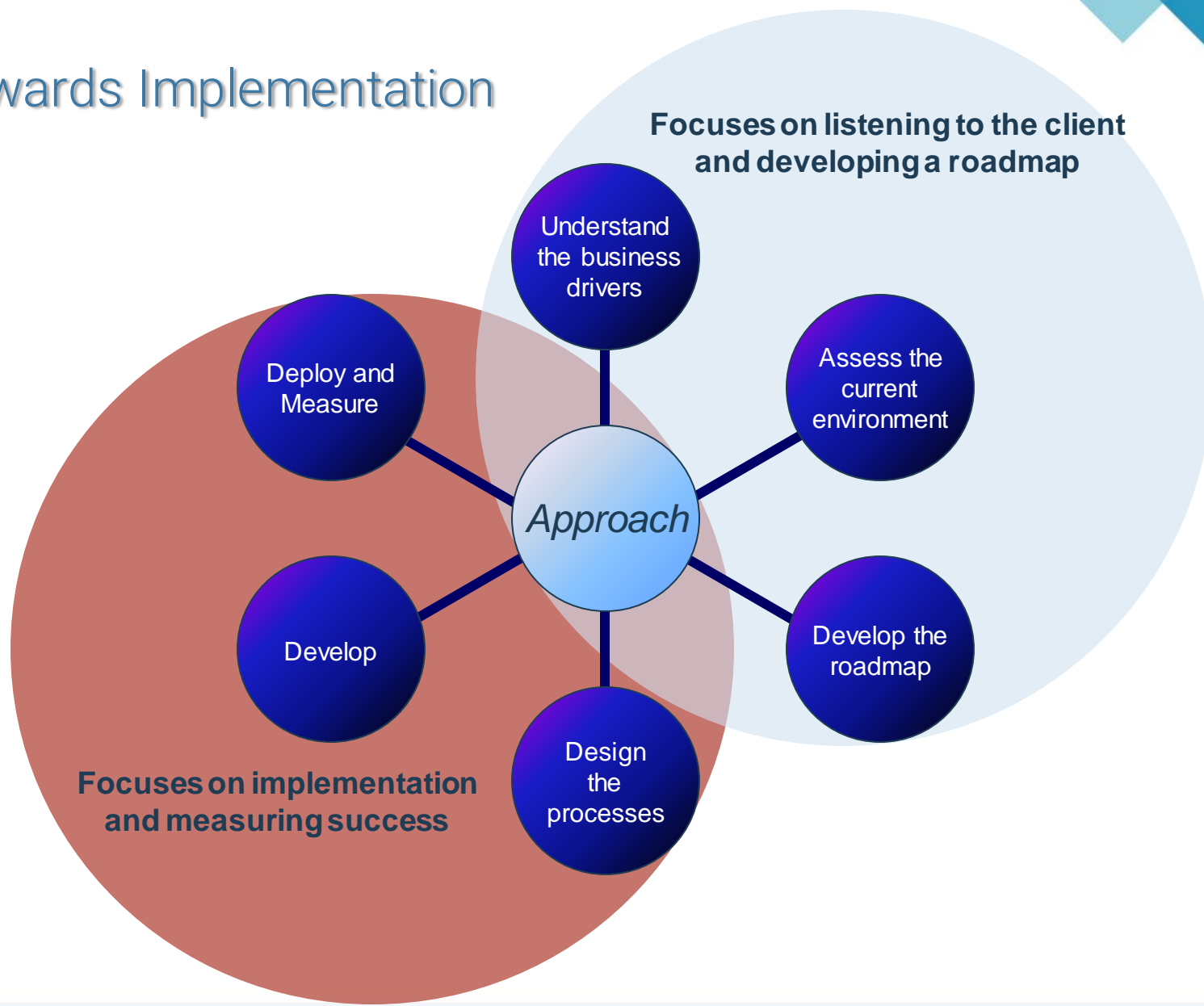
The Navvia Methodology



Full-spectrum Assessment followed by Designing, Developing and Deploying Process and Technology in parallel to:

- Increase the probability of success and
- Shorten time to implement

Approach Towards Implementation

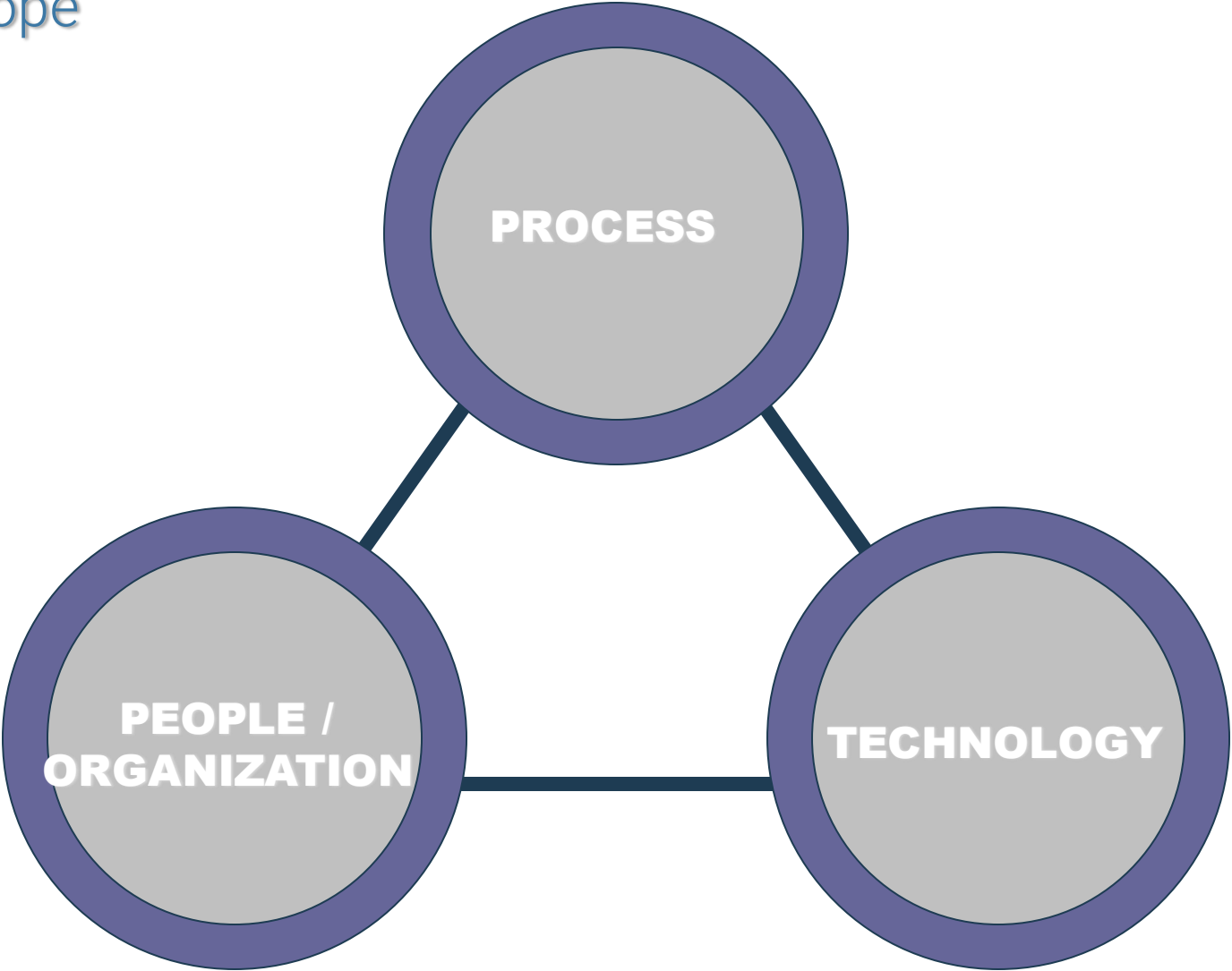


Goal of a Process Assessment



Evaluate the process implementation for an IT Process Management framework in terms of *People, Processes, & Technology*

Assessment Scope



Value of an Assessment



“The true value of an assessment is NOT a 1 to 5 score but the opportunity it provides to listen to your stakeholders and to bring about improvement ”

Why are Assessments Important?

- ✓ Assessments open a dialog with stakeholders
- ✓ Assessments are a catalyst for change
- ✓ Assessments provide a baseline from which ROI can be measured
- ✓ Assessments identify gaps which lead to recommendations
- ✓ Assessments are the basis for an implementation roadmap



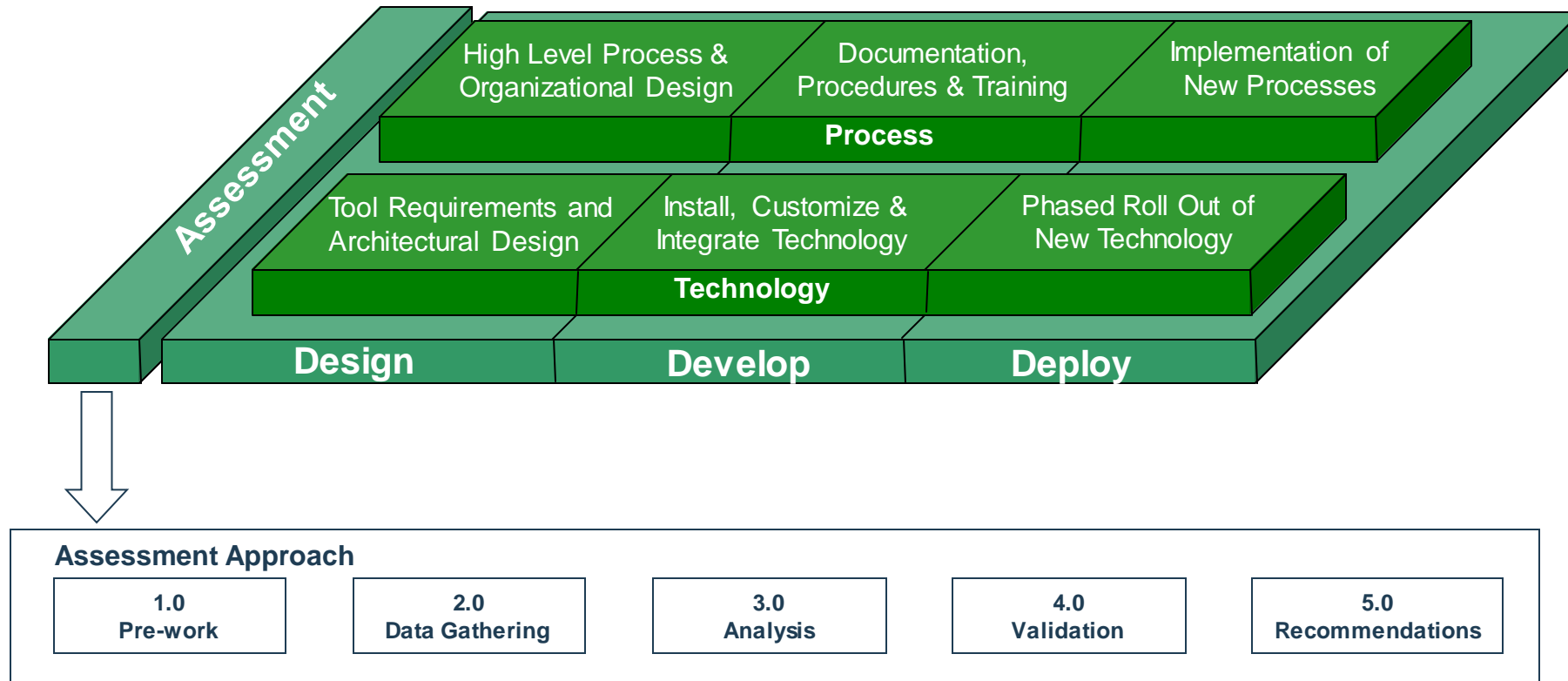
8 Step Approach for Change



Planning & Conducting the Assessment



Assessment Approach



Assessment Activities



- Determine Scope
- Plan your Work
- Interview Stakeholders
- Assess Maturity
- Compile and Validate Findings
- Develop Recommendations
- Develop Roadmap

Assessment Deliverables




- ✓ An executive summary
- ✓ Validation of key pain-points and opportunities for process improvement
- ✓ Summary of observations and findings
- ✓ Gap analysis - comparison to best practices and desired state
- ✓ Recommendations for organizational structure, tools, and processes
- ✓ Roadmap: Implementation activities and timeline

Assessment Techniques

Questionnaires

Question 1

Is there a **Process Owner** in place for the Incident Management process?



Definition: The role of Process Owner includes the following responsibilities: Organizational champion, sponsorship, overall accountability, and continual improvement of the process. The Process Owner does not have to be a dedicated job or job title.

People

I am not aware if there is such a role in place.

I know that we do not have the role of Process Owner defined.

We have a Process Owner(s) but I don't know who.

We have several people currently sharing these responsibilities.

We have a single Process Owner for this process.

Back Next
Return Later

Data Gathering



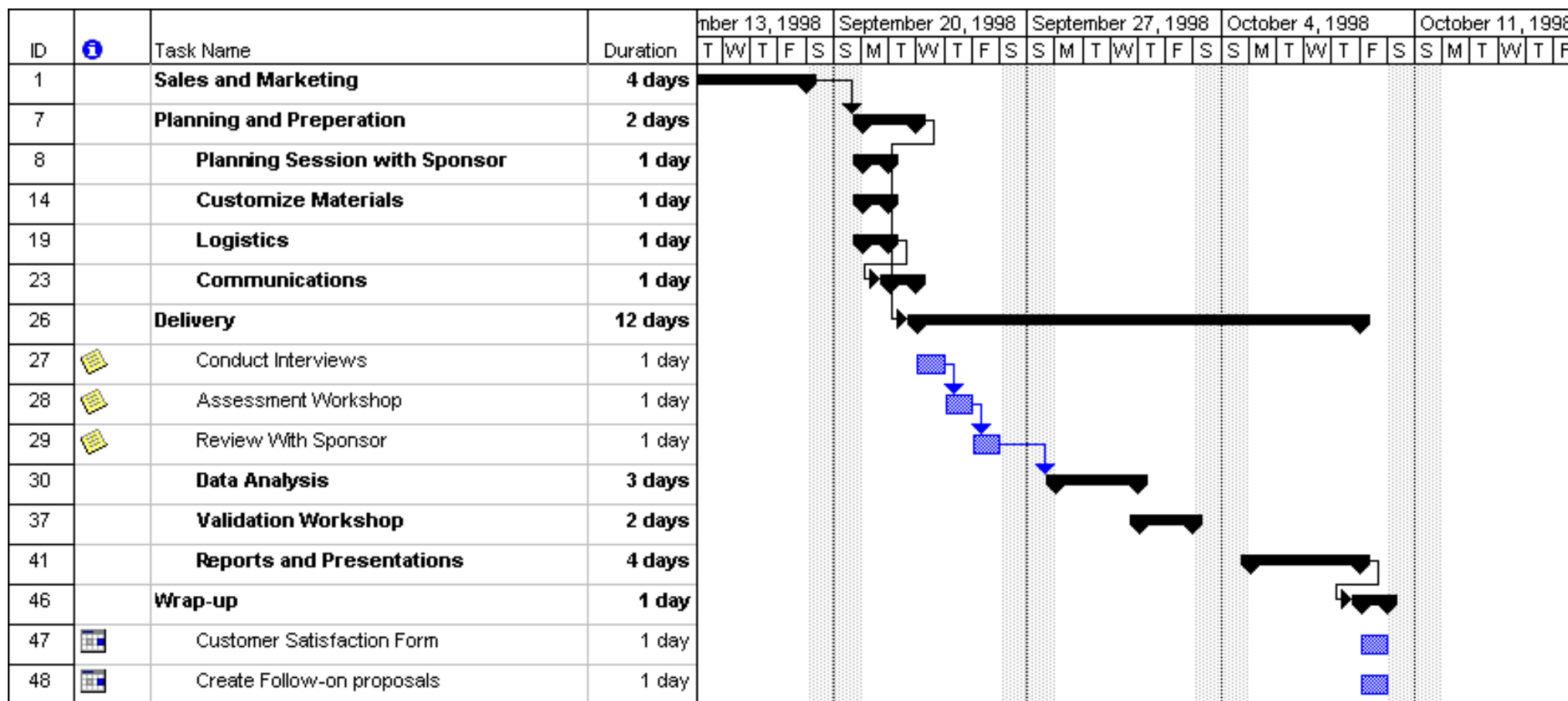
Interviews



Workshops



Create a Project Plan



Conduct Planning Session

Conduct Planning Session with Sponsor

Initial meeting with the sponsor once the project has been approved.

Planning

Review the project scope – make sure deliverables are clear

Review the Roles and Responsibilities

Review the project timeline

Review the project change control process

Review the issue management process

Review the progress management and reporting process

Review the risk analysis and management plan.



Customize Materials

The Navvia Product comes complete with a number of sample documents that can be customized for use. These include (among other samples):

- Kickoff presentation
- Assessment workshop materials
- Interview forms
- Sample final report
- Assessment preparation guide



Assessment Preparation Guide

- Data gathering checklist
- Required participants and their roles
- Synopsis of interview questions
- Workshop/interview invitation letters



Conduct a Kickoff Meeting

The kickoff meeting sets the overall tone for the assessment

Attendees should include:

- everyone directly involved in the assessment
- their management
- any other people designated by the sponsor.

Senior Manager should open it.

Conduct a Kickoff Meeting (continued)

Duration: 1.5 – 2 hours

Agenda:

- Open remarks (executive management)
- High level overview of the Assessment approach
- IT Service Management Processes (in-scope and adjacent)
- Goals and objectives of the assessment
- The deliverables
- Project schedule
- Stakeholders' involvements

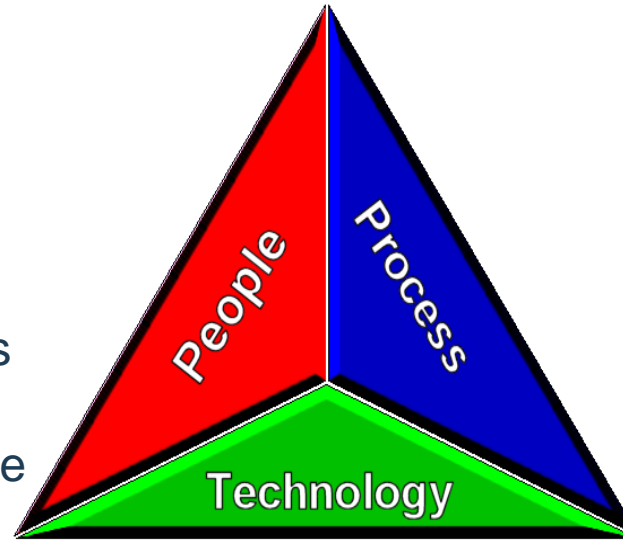
Gather Background Data



- ☑ Business Environment
 - Copies of other assessments or evaluations
 - Company mission statement and guiding principles
- ☑ IT Environment
 - IT Strategic Plan
 - IT Tactical Plan
 - IT Architecture
 - Configuration information and diagrams
 - Documentation on current IT initiatives and projects
 - Service Level Agreements
- ☑ The Organizational Structure
 - Organization chart
 - Telephone / e-mail directory
 - Site Locations
 - Lines of Business / key departments
 - IT User Profile (who are the key users of IT services)
- ☑ Documentation on Current Processes
 - Process Descriptions
 - Roles and Responsibilities
 - Supporting Technology / Tools
 - Process Measurements / Reports
 - Related Procedural Documentation
 - Current Pain / Issues

Gather Background Data

- Evidence of a Practice
- Process Ownership
- Roles & responsibilities
- Skills & training
- Organizational structure



- Documentation
- Consistent execution
- Links to other processes
- Metrics

- Tools supporting the Process
- Conformance to architecture
- Customization to support the processes
- Tool Integration
- Exploitation of tool features

Distribute Questionnaires

ITSM Process Maturity Questionnaire(s)

To be completed by selected staff

Separate questionnaires for each process under assessment

May select some people to complete more than 1 questionnaire

Browser based

Launched by the Navvia Survey tool

Estimated time to complete

10-15 minutes per questionnaire



Distribute Questionnaires (continued)

The questionnaires consist of:

- Process-specific questions unique to a particular process

- A common set of questions repeated for each process

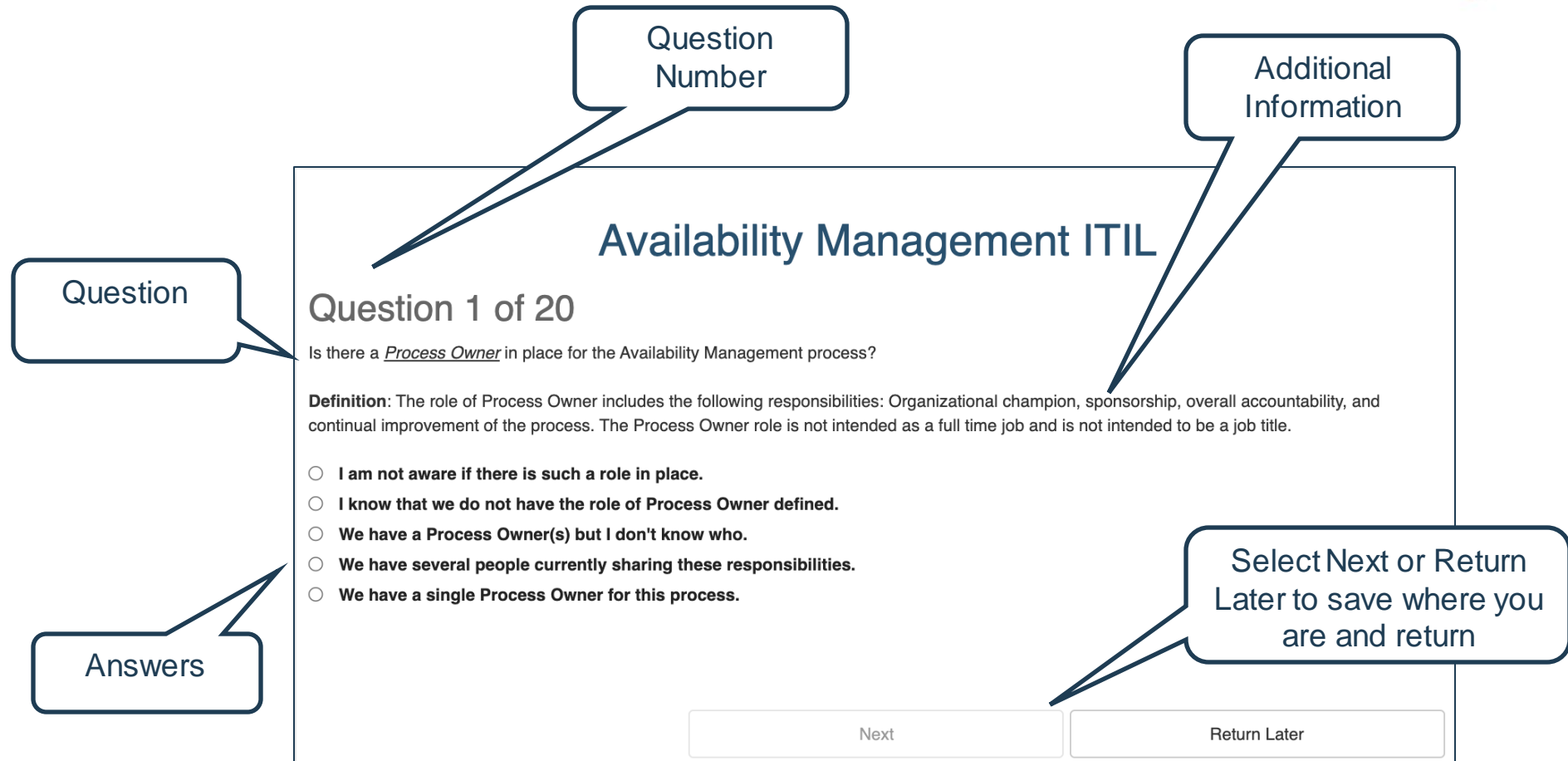
People can save and exit the questionnaire at any time and resume at some later point - the questionnaire remembers where they left off.

The questionnaires must be completed and returned prior to the expiry date (specified in the email invitation).

- The back-end processing system requires all questionnaires to be returned by a specific date (they are processed all at once)

- Questionnaires cannot be opened after they have expired

Question Structure



Questionnaire Workflow

Each respondent will receive an email containing the URL, Userid and password to access the questionnaire(s)



The URL will point to the Survey logon page



NAVVIA
service management made easy

User Name: *

Password: *

Log Me In

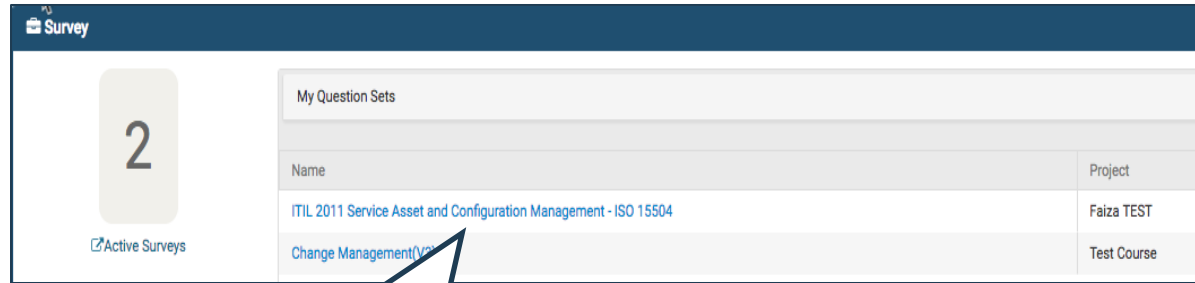
Invalidate Other Sessions

[Change Password](#) [Forgot Password](#)

My Question Sets	
Name	Project
ITIL 2011 Service Asset and Configuration Management - ISO 15504	Faiza TEST
Change Management(V3)	Test Course

Once the person logs on, they are taken to the Navvia Home page

Questionnaire Workflow (continued)

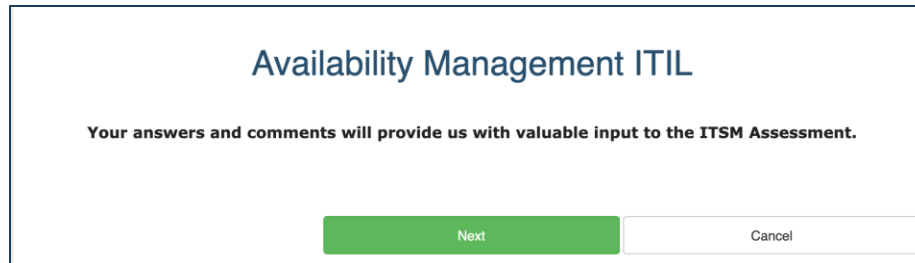


Survey

2
Active Surveys

My Question Sets	
Name	Project
ITIL 2011 Service Asset and Configuration Management - ISO 15504	Faiza TEST
Change Management(V...	Test Course

Select the questionnaire you wish to begin

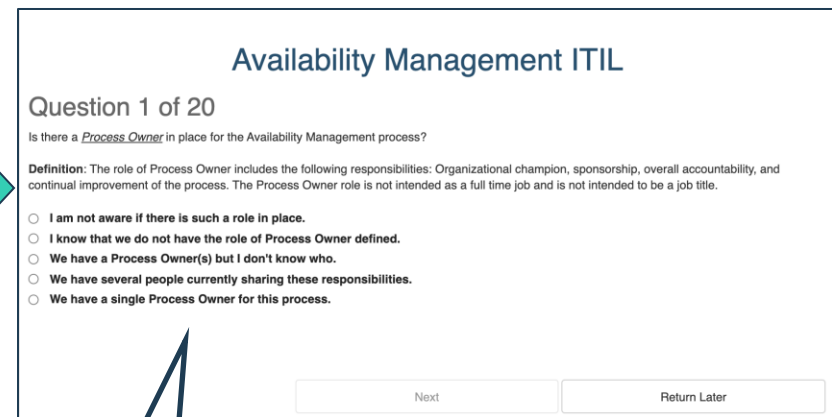


Availability Management ITIL

Your answers and comments will provide us with valuable input to the ITSM Assessment.

Next Cancel

Click on NEXT to begin the questions



Availability Management ITIL

Question 1 of 20

Is there a *Process Owner* in place for the Availability Management process?

Definition: The role of Process Owner includes the following responsibilities: Organizational champion, sponsorship, overall accountability, and continual improvement of the process. The Process Owner role is not intended as a full time job and is not intended to be a job title.

- I am not aware if there is such a role in place.
- I know that we do not have the role of Process Owner defined.
- We have a Process Owner(s) but I don't know who.
- We have several people currently sharing these responsibilities.
- We have a single Process Owner for this process.

Next Return Later

Select the appropriate answer

Click on NEXT to continue

Questionnaire Workflow (continued)

Change Management ITIL

Question 5 of 22

What *training* is available to you for the Change Management process?

Tip: Training refers to how to use the Change Management process, *not* generic job training or the specific skills training for the infrastructure that you support, e.g. Microsoft Office, Project Management, Linux, Microsoft Certifications.

- I am not aware of any training for the process.
- I only have informal or on-the-job training available to me.
- I have structured training available to me, using materials created specifically for our group.
- I have standardized training available to me that is also available for the entire organization.

Please identify the most recent training that you have completed and when e.g., year/month:

Links & Attachments

URL

Attachments

Select Files ...

[Click here for file attachment instructions](#)

Some answers will open a text box for additional details or a method for attaching a document or a URL



Thank You for completing the survey.

[Finish](#)

When you have answered all the questions, you select FINISH to return to the Home Page and continue with any other Questions sets you have.



Completing the Questionnaire

Instructions to Users

If you are not completely sure about an answer, please give your answer as if it were prefaced by:

“It is my understanding that...”

“As far as I know...”

“To the best of my knowledge...”

Select “No” for those questions for which you have no idea of the answer

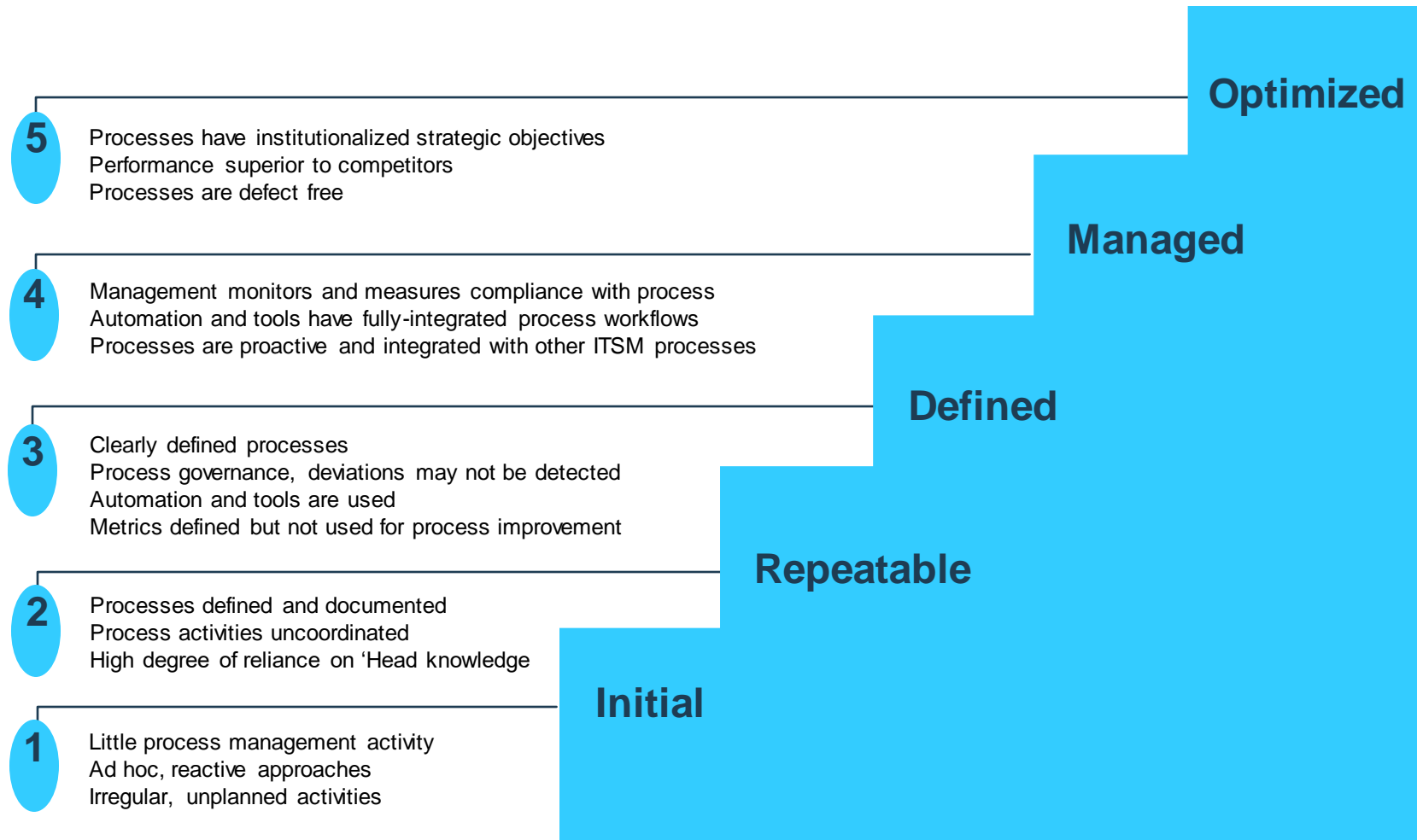
Questions that have a supporting question and to which you replied “Yes”, must have a textual response provided before the Next button becomes enabled

Use the Comments field

Additional information welcome!

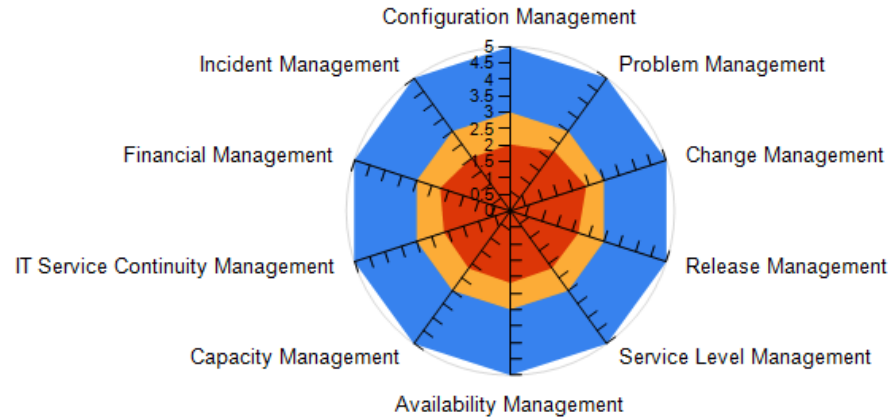


Questionnaire Scoring



Questionnaire Scoring (continued)

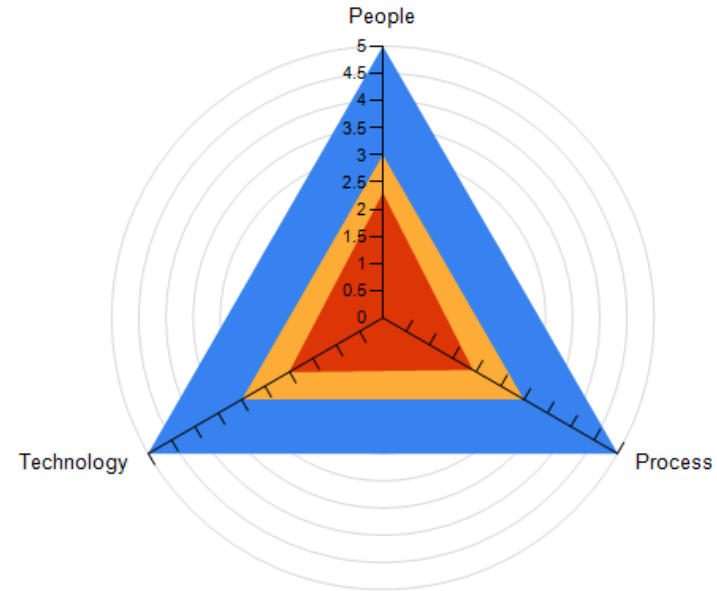
Project: Baseline ITSM Assessment



■ Potential Score ■ Meets Requirements Score ■ Your Score

Overall Assessment

Project: Baseline ITSM Assessment Question Set: Incident Management



■ Potential Score ■ Meets Requirements Score ■ Your Score

Individual Process Assessment(s)

Conduct Interviews

Process Assessment Interview Questionnaire

Name: _____ Date Of Interview: _____
 Position: _____ Interviewed By: _____
 Dept: _____ Interview Method: Phone
 Location: _____ In Person
 Phone: _____

General Observations / Comments:

Develop a
standardized
Interview
Questionnaire

I.2 PROCESS (CONT'D)

Question 6

Are you aware if the appropriate controls & measurements exist to ensure that issues with the process are quickly identified and corrective action is taken?

Rationale

For a process to be successful it must be able to adapt to ever changing environments. Without adequate controls and measurements, management does not have the necessary tools at their disposal to ensure that a process is healthy, and continues to meet requirements.

Alternate Question(s)

Have you seen reports? Is there a mechanism by which to provide feedback or suggestions on a particular process? Is the reported data meaningful (i.e.: 99% reliability vs. customer satisfaction)? Do the controls reflect the policies of the process, and are the policies aligned with changing business requirements?

Other Points to Consider

- Regularly scheduled process management meetings vs. c
- Published and regularly reviewed SLA's

Client Response

	B	C	F	G	H	
1	Date	Theme	Flag	Process	Initials	Comment
1175	14-May-04	Technology		Backup	GH	We have plans to migrate off of Omniback - it's not user friendly - requires dedicated drives -
1176	14-May-04	Technology		Backup	GH	We had a major tape related problem with our recent SAP implementation - took at least 2 n
1177	14-May-04	People		Backup	GH	We are totally dependent on the application folks for the distributed platforms - we don't unde
1178	14-May-04	Technology		Availability	GH	The midrange and server platforms are not industrial strength - like the mainframe
1179	14-May-04	Process		General	GH	The formal disciplines and procedures are lacking in the distributed area - although we are t
1180	14-May-04	Process		SLM	GH	There are no official SLA's - but you soon find out what is critical and react (ie: a fax server g
1181	14-May-04	Process		Problem	GH	We are very good at performing triage - we do a fair amount of diagnosis before escalating t
1182	14-May-04	People		Organization	GH	There is good synergy within the group - between automation, operations, network managen
1183	14-May-04	Process		Operations	GH	We monitor the health of the network - is data flowing?
1184	14-May-04	Process		Problem	GH	Some applications are very difficult to diagnose - ie: Navigator - many points of failure, diifcu
1185	14-May-04	Wish List		Backup	GH	Would love to have only two backup software products - 1 for the mainframe and one for the
1186	14-May-04	Wish List		Backup	GH	Would love to have one tape platform / one vendor across all platforms
1187	14-May-04	Technology		Storage	GH	Disks are not an issue - they just don't fail
1188	14-May-04	Technology		Backup	GH	I feel we have taken a giant step backwards with respect to tape (not industrial strength)
1189	14-May-04	Process		Contingency	GH	We in IT Operations have identified mission critical applications
1190	14-May-04	Process		Contingency	GH	If we went to the business, they would identify all of their applications as mission critical
1191	14-May-04	Process		Contingency	GH	We have identified everything Operations needs in the event of a disaster
1192	14-May-04	Technology		Contingency	GH	We do not have a central configuration repository that would aid in identifying the compon
1193	14-May-04	Process		Contingency	GH	Our DR tests with SunGuard have been very successful - I feel comfortable with our process

Capture responses
by process and theme

Conduct Interviews (continued)

Are the Processes Working?

Ask the interviewee one simple question....



...What was the most painful event in the last 6 months?

Conduct Interviews (continued)

General guidance on interviews.

- Be on time.

- Introduce your team if they and the subject aren't acquainted

- State the objectives of the interview.

- Provide the subject with some background information on the project. Do not assume that they are up to speed.

- Take clear notes. It's OK to ask the subject to repeat themselves.

- Let the subject do the talking. Ask open-ended questions that spur discussion.

- Adapt the interview dynamically

 - Don't leave out key areas, but don't ask questions that have now become meaningless

Conduct Interviews (continued)

Enter Interview notes in an Interview Data Collector spreadsheet.

Some recording tips:

- Record only what is important.

- Use the Report Flag, General and Process specific columns



Conduct Desk-side Observations

Conduct Desk-side Observations

- Seeing the tools in action
- Usability issues (pain points)
- Typical & power users
- Current tool developers



Attend Demonstrations, Ad Hoc Meetings

- With subject matter experts (SME) in each of the processes
- To validate what you have learned
- To ask additional questions
- To get hands on demonstrations of the processes at work

Conduct Assessment Workshops



Facilitator will review the goal and key activities of the process

A series of questions will be presented

Typically for each question area:

- Get a feel for consistency of thoughts

- Encourage discussion where thoughts differ

Collect data using the interview spreadsheet

Analysis



Analysis Stage

Conducting the Assessment (Analysis Onward)

Analyze the Data

Validate the Findings

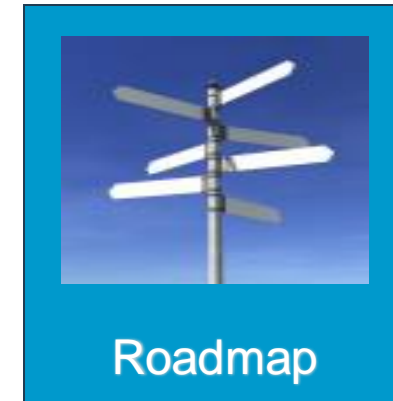
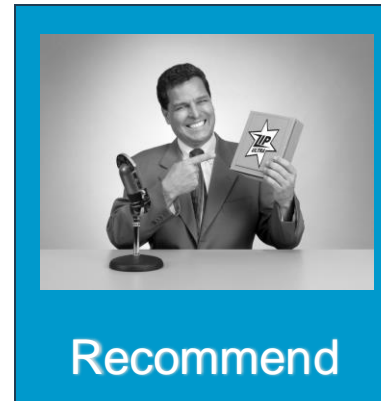
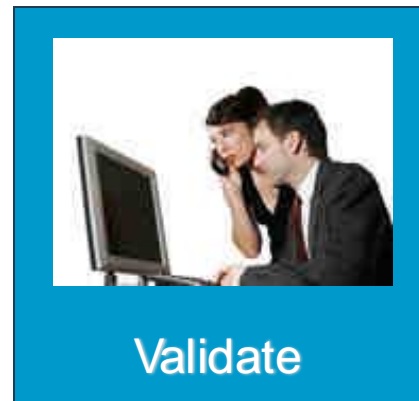
Develop a Roadmap

Prepare Reports and Management Presentation

Beyond the Assessment

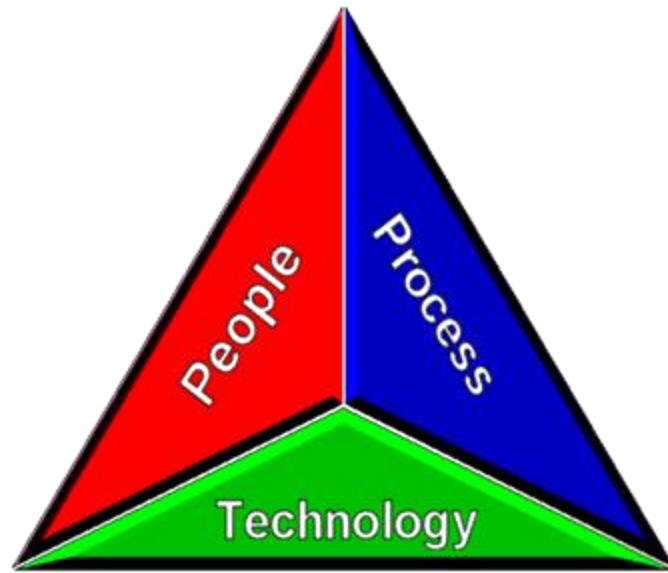


Analyze the Data

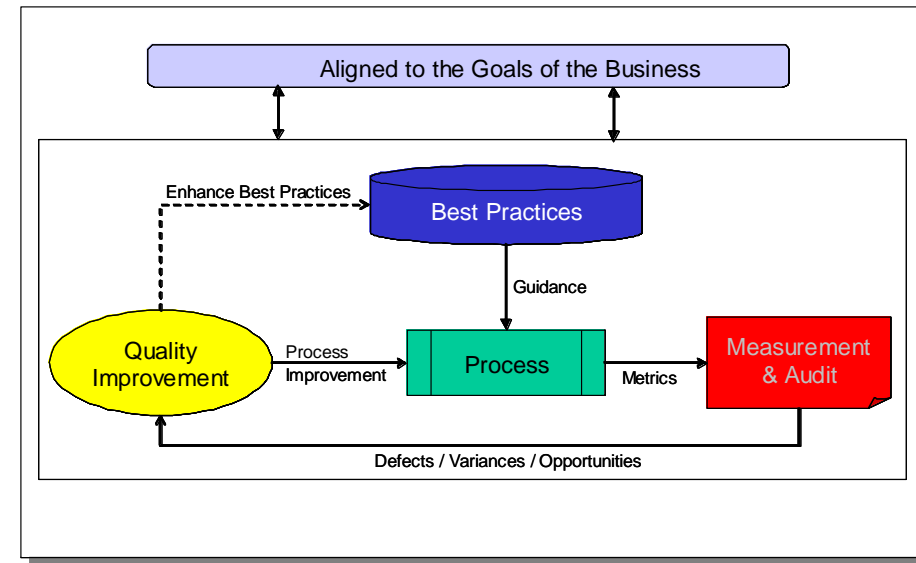


The four steps to building the roadmap

Analyze the Data (continued)



Look beyond the Process



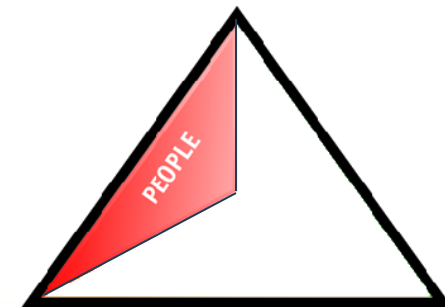
Look for evidence of a Practice:

- Process Management
- Process Governance,
- Continual Improvement

Analyze the Data (continued)

Common People Issues

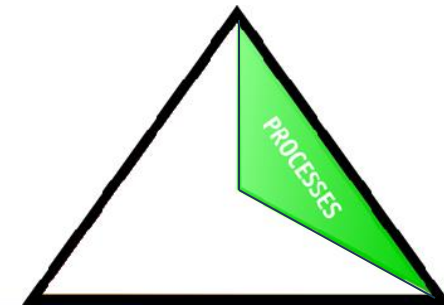
- No clear process ownership / multiple owners per process
- Unclear roles and responsibilities
- Lacking specific skill sets
- Inability to consistently access on call support staff (paggers)
- Many concurrent investigations and projects underway, people are stretched
- Inappropriate Staffing levels
- Poor Inter-departmental communications
- Inappropriate Organizational structure
- Poor Customer Satisfaction – perception of the value of IT



Analyze the Data (continued)

Common Process Issues

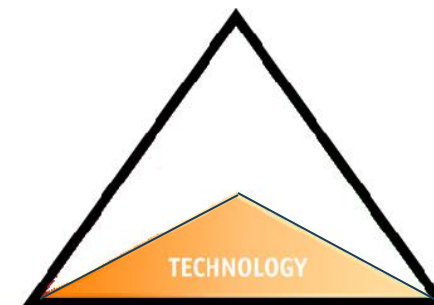
- Lack of common, formally documented and adopted processes
- Confusion between process and procedures
- Lacking Process Metrics or Data versus Information
- No continuous improvement / Corrective action
- Inconsistent administration across the enterprise & across technology platforms
- Poor inter-departmental handoffs
- Poor inter-process communication
- Lack of adequate controls (escalation guidelines, severity levels, work queues, etc.)
- Does not support predictive and proactive activities



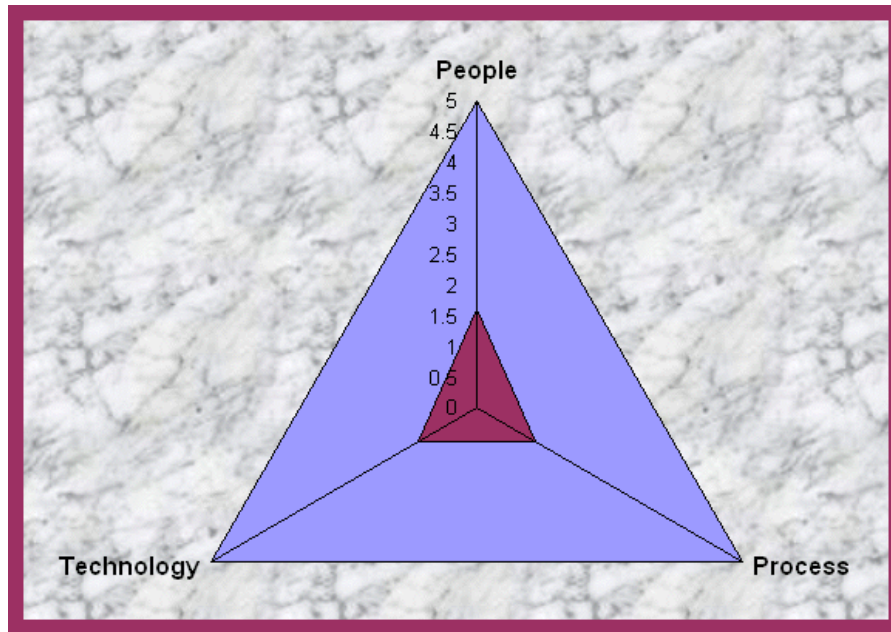
Analyze the Data (continued)

Common Technology Issues

- Lack of tools to support the process
- Multiple tools to support the same process
- Inconsistent use of tools across the enterprise
- Poor management of the distributed environment
- No Centralized administration and control
- Tool-driven process versus process-driven tools
- Lack of integration
- Lack of automation
- Failure to exploit potentially beneficial features of the tools

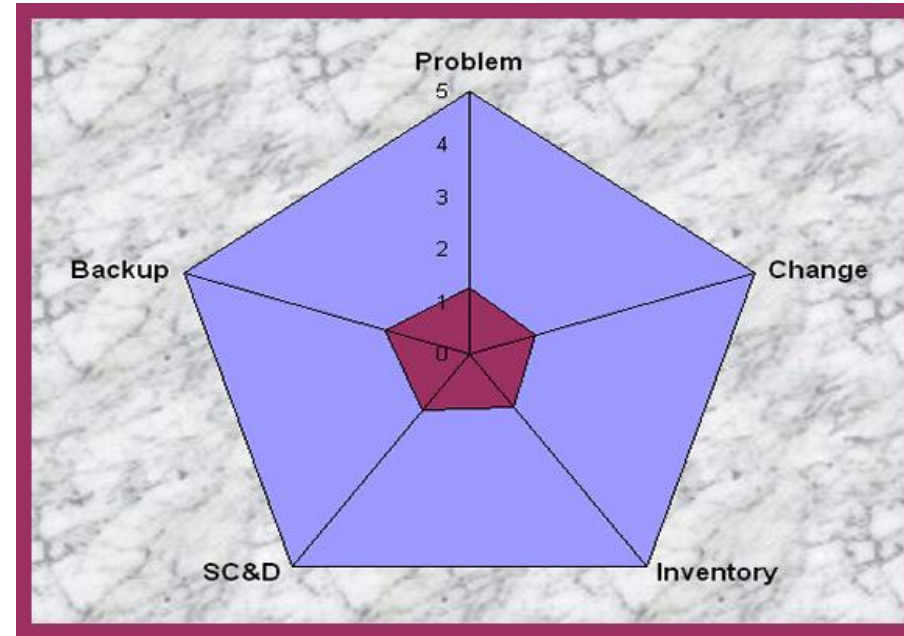


Analyze the Data (continued)



Individual Process Assessment

- Identifies which aspect of the process requires attention
- A graphic representation of the health of the individual process
- Establishes a baseline

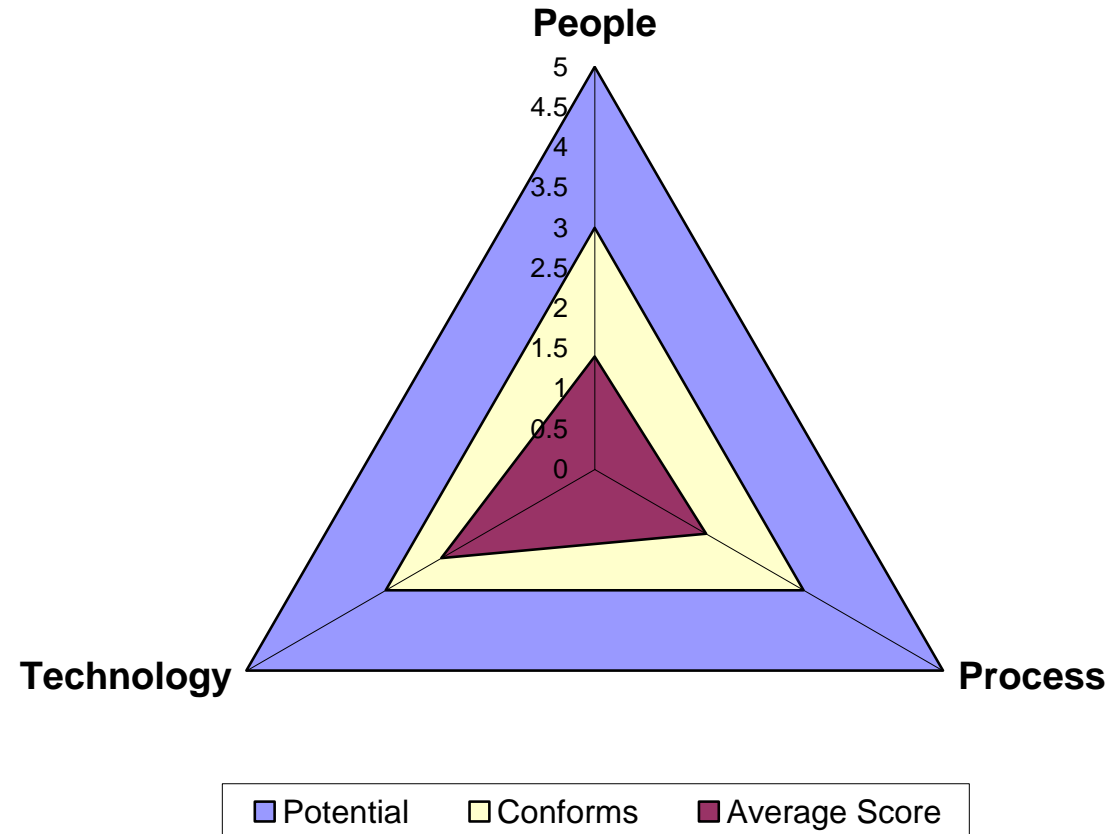


Overall Process Assessment

- A graphic representation of the health of the key Systems Management Processes process
- Identifies which process requires attention

Analyze the Data (continued)

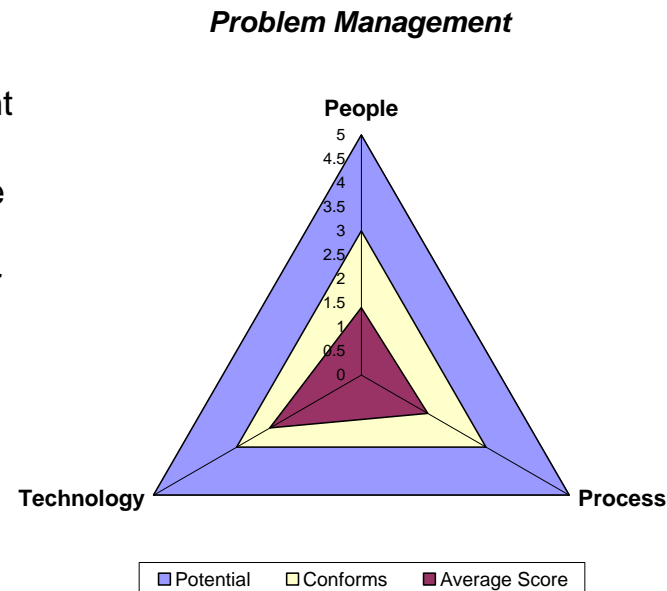
Problem Management



Analyze the Data (continued)

Problem Management

- Need to learn triage
- We very often do things on a heroic basis
- Different locations have different process for handling problems
- We have “Go-arounds” - people call person who can fix it
- Not leveraging tool to do proper categorization
- No severity / priority structure
- Lack of respect for Help Desk function
- No problem owner, “hot potato”
- Buy tools to solve procedural problems



Validate the Findings

Conduct a validation workshop for each of the processes

- To validate all findings before commencing the final documentation

Conduct an integration validation workshop

- To ensure that integration requirements and interfaces between the processes have all been identified and documented.



Validation Workshops
Validate Findings
Confirm Finding-Observation linkage
Consensus on Priorities
Representatives of all contributing stakeholders

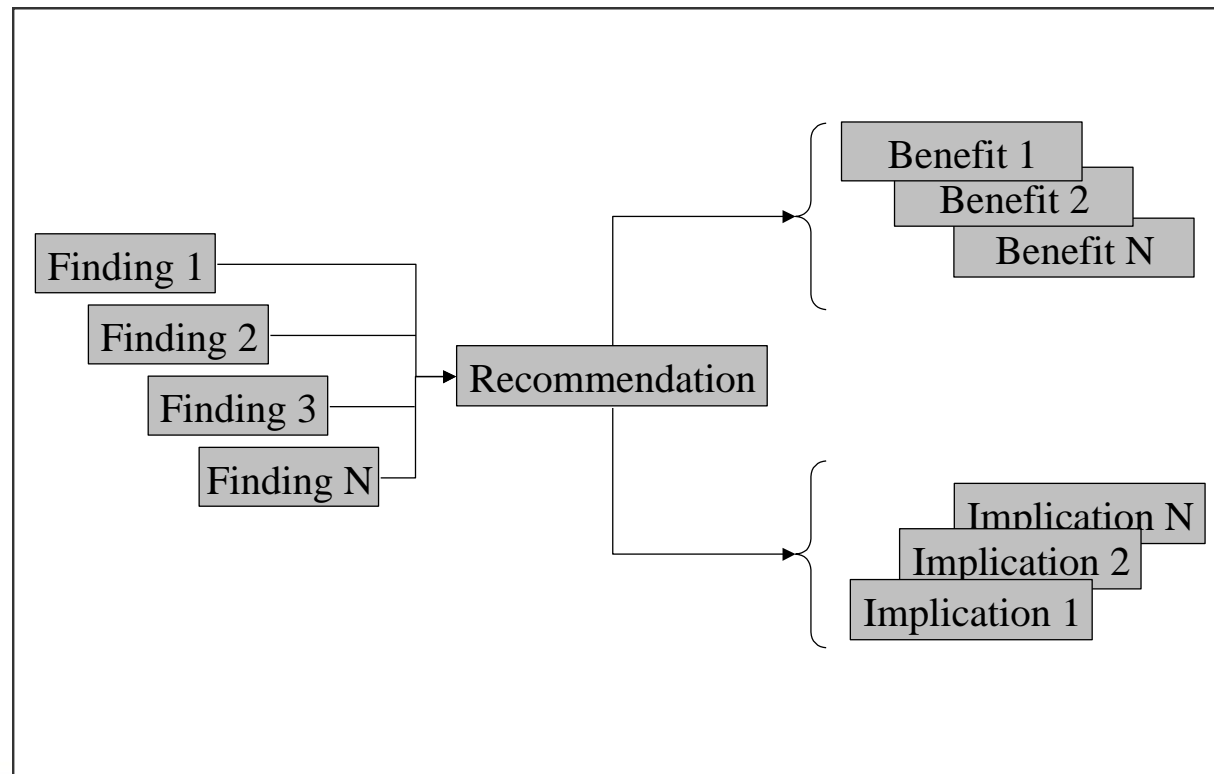
Consolidated Findings and Impact

<p>Findings</p>	<p>Findings</p>	<p>Findings</p>
<ul style="list-style-type: none"> • There is buy-in to ITSM <ul style="list-style-type: none"> – Many individuals in stakeholder positions expressed a desire to be more involved with ITSM activities • Incident Management and Problem Management processes are well documented <ul style="list-style-type: none"> – Process documented – Training provided • Single Point of Contact for the organization 	<ul style="list-style-type: none"> • Execution of the incident management process is not as effective and efficient as it could be <ul style="list-style-type: none"> – Many people voiced confusion over roles and responsibilities – For some issues, the Service Desk acts as a Call Centre (routing calls vs. 1st call resolution) – Many people had issues with confusion in mis-assignment of incidents – Tickets assigned to the incorrect person encroaches upon project work – Information required to diagnose users – Targets for resolution times are being missed 	<ul style="list-style-type: none"> • Problem management process is not effective at reducing or eliminating recurring incidents <ul style="list-style-type: none"> – The Problem Management Coordinators are not sure how to execute their role – Analyzing incidents to identify problems is not performed on a regular basis – Perception of not enough time to do root cause analysis – Too busy firefighting to prevent new fires – “The same Incidents happen each month” – Permanent fixes are not implemented, resulting in recurring incidents – Avoidable incidents occur
<p>Impact to (Name withheld)</p>	<p>Impact to (Name withheld)</p>	<p>Impact to (Name Withheld)</p>
<ul style="list-style-type: none"> • Better alignment with business objectives • Increased sense of ownership • (Name withheld) has been able to... 	<ul style="list-style-type: none"> • Resolution of incidents takes long decreased user productivity due to • More resources than necessary going to resolving recurring incidents resulting in fewer resources dedicated to projects 	<ul style="list-style-type: none"> • Productivity of end users is reduced through <ul style="list-style-type: none"> – Reporting of recurring incidents to service desk – Manual workarounds while service is being restored – Rework required to “catch-up” once IT service has been restored • IT support resources allocated to resolving recurring and avoidable incidents are not available for projects • Negative impact on system availability

Developing Recommendations

Bringing It All Together

Once you have completed the analysis you must develop your recommendations. Recommendations should be constructed in the following form:



The Pieces



Finding

A key challenge or opportunity identified based on observations made during interviews, workshops as well as on provided background data. The finding is the basis for the accompanying recommendation.



Recommendation

Recommendations to address one or more related findings.
Includes an implementation approach.
A typical assessment results in 10-20 prioritized recommendations.



Implications

Implementing the recommendation may have associated risks or demands that may need special consideration. There may also be consequences if no action is taken.



Benefits

What are the tangible benefits of implementing the proposed recommendation and who will realize such benefits.

Detailed Recommendations

Findings, Recommendations, Implications, Benefits and Supporting Details

Finding and Recommendation

- Execution of the incident management process is not as effective or efficient as it could be
- Many people had issues with categorization – difficulty selecting correct support group lengthens resolution time

Implications and Benefits

Implications

- Executive sponsorship
- Requires MLF-wide buy-in
- Allocation of resources for design (8-10 people – 320 hrs per process)
- Retraining on processes as implemented in the ITSM tool

Benefits

- Common view of all processes across the organizations will lead to improved service levels
- Metrics will be available to manage and improve the processes
- Reduction or elimination of duplicate work
- Process goals, objectives, roles and responsibilities are known by all parties
- Communication will be improved across MLF-wide IT organizations

Details

Details

- **Process Refresh Design Workshops**
 - Review existing categorization tree structure and identify changes that will drive incident diagnosis, assignment and workflow
 - Design priority calculator that can be used to objectively assign incident priority based on impact and urgency
 - Review interfaces between incident and problem management processes and modify as required to enable incident matching and integration with problem management
 - Plan on holding 4 workshops (2 for IM and 2 for PM) at approximately 4 hours each
- **Technical Design Workshops**
 - Every process design includes a technical design aimed at the selected tool
 - Identify the data and technology requirements for each activity
 - Identify integration points
 - Exploit automated workflow to ensure adherence to the processes
 - Develop a "Technical Design Document" based on data and technology requirements
 - This document will identify how existing support tools can be implemented and tailored to support the new process with workflow as appropriate
 - Plan on holding 8 (4 for IM and 4 for PM) workshops at approximately 4 hours each

Details

Details

- **Sample**

Recommendation

MLF undertake a "re-problem Management IT groups across MLF. Enhanced with elements of process remediation"

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Prepare Reports/Management Presentation

It is best to deliver all documentation in “presentation format”.

Make sure your sponsor buys in to this approach.

Make sure drafts are reviewed.



Prepare Reports/Management Presentation

The Draft / Final report should contain the following sections:

Executive summary

Two or three pages describing the project goals and objectives, the approach used to deliver the engagement and the highlights of the Recommendations

Introduction

Approach and Methodology

Observations and Findings

Analysis

Recommendations

Summary Recommendations

Detailed Recommendations

Implementation Plan

Prepare Reports/Management Presentation

The Draft / Final report (continued):

Appendix

The participants: A page dedicated to thanking the participants in the assessment. The names of all the participants should be listed here.

Appendix

The summary charts developed for the validation workshop.

The raw data gathered during the assessment workshop

The document summarizing all interviews, comments, and observations

Bibliography of documents reviewed

Prepare Reports/Management Presentation

Management Presentation

The management presentation is your opportunity to present your findings and recommendations in a formal setting, and more importantly, outline the next steps and get approval to move forward.

Duration

Schedule approximately two hours for the meeting.

Logistics

Be sure to send out the appropriate meeting notices and to book the room and equipment well before the scheduled meeting date.

Attendees in the management presentation should include:

- Facilitator's management and sales representation
- The Sponsor
- The Sponsor's senior management
- The Sponsors' peers
- The participants (if appropriate)
- Selected guests

Prepare Reports/Management Presentation

Logistics (continued)

The management presentation is basically the final report minus the appendix. Copies of the complete report should be handed out (depending upon the culture) either at the beginning or at the end of the presentation.

Area of focus

Don't spend too much time reviewing the details of the assessment. The bulk of the time should be used to discuss the next steps and to get approval to move forward.

Develop a Roadmap

Review outputs from previous assessments, benchmarks, customer satisfaction surveys and other sources of feedback

Take stock of the current business environment

Identify and prioritize ITSM implementation actions based on return on investment

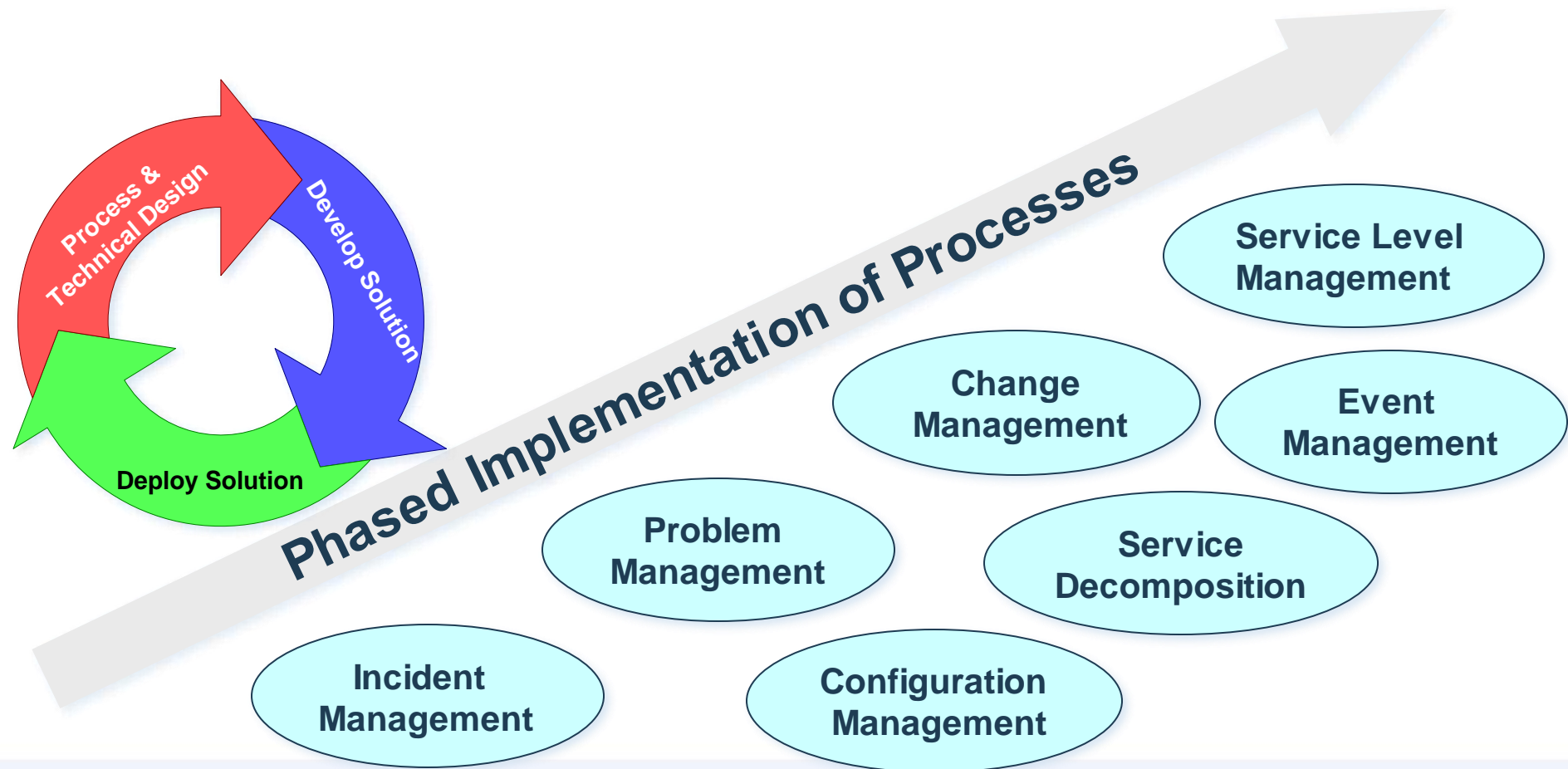
Gain consensus / approval for moving forward

Document and communicate the planned activities

Ensure your ability to Measure and Control the execution of the Roadmap - (Project Management aspects)

Develop a Roadmap (continued)

Begin with the Basics



Develop a Roadmap (continued)

When building a roadmap, consider:

- The importance of Quick Wins

- Having visible successes and milestones aligned to the business

- The importance of a business case

- Setting priority set based on value to the business

- Taking “Baby Steps” – don’t undertake too much at once

- The need to manage roadmap change and scope creep

- Having the right resources in place

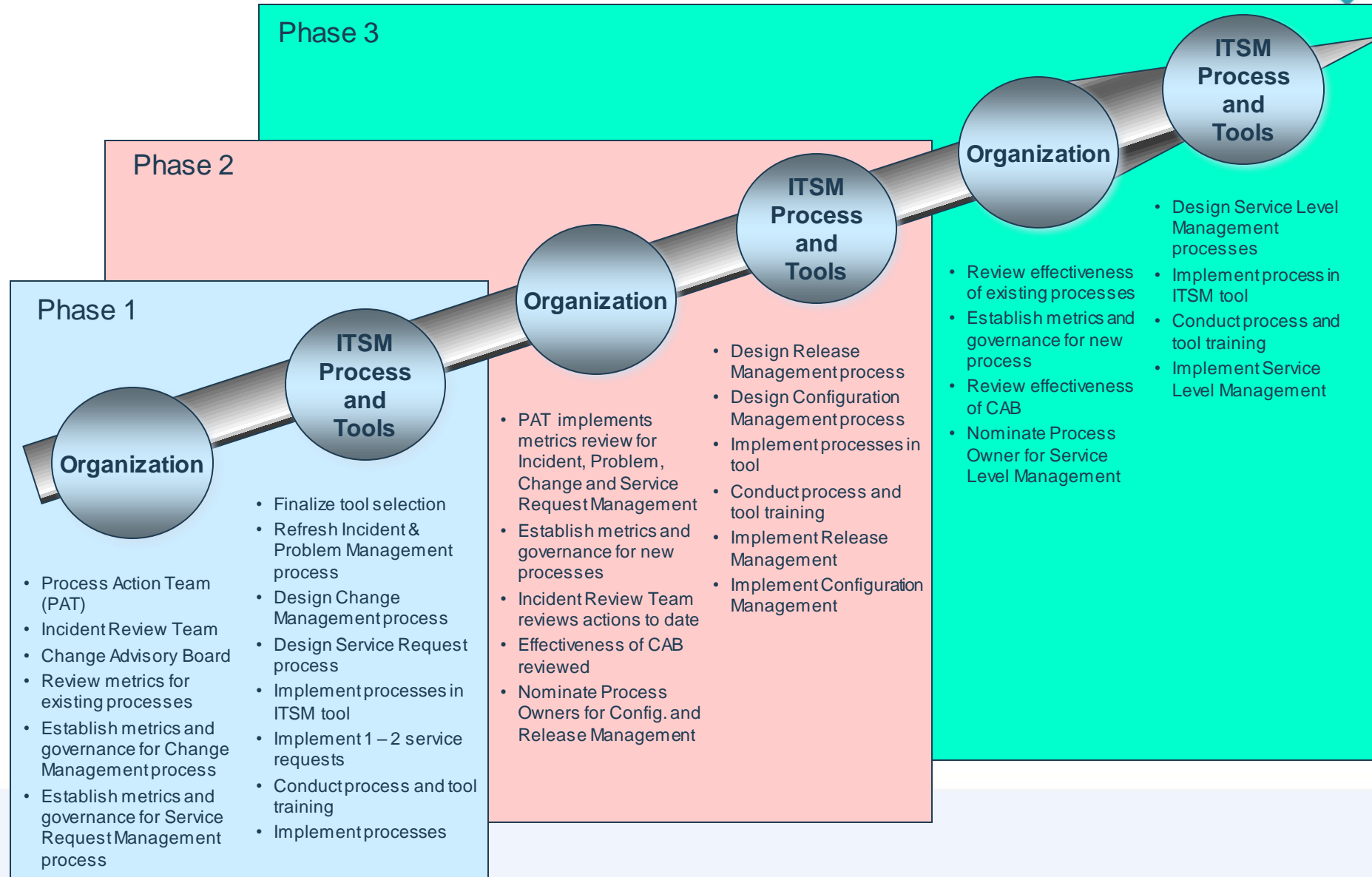
- The impact of resistance to change

- The importance of ITSM as a Practice

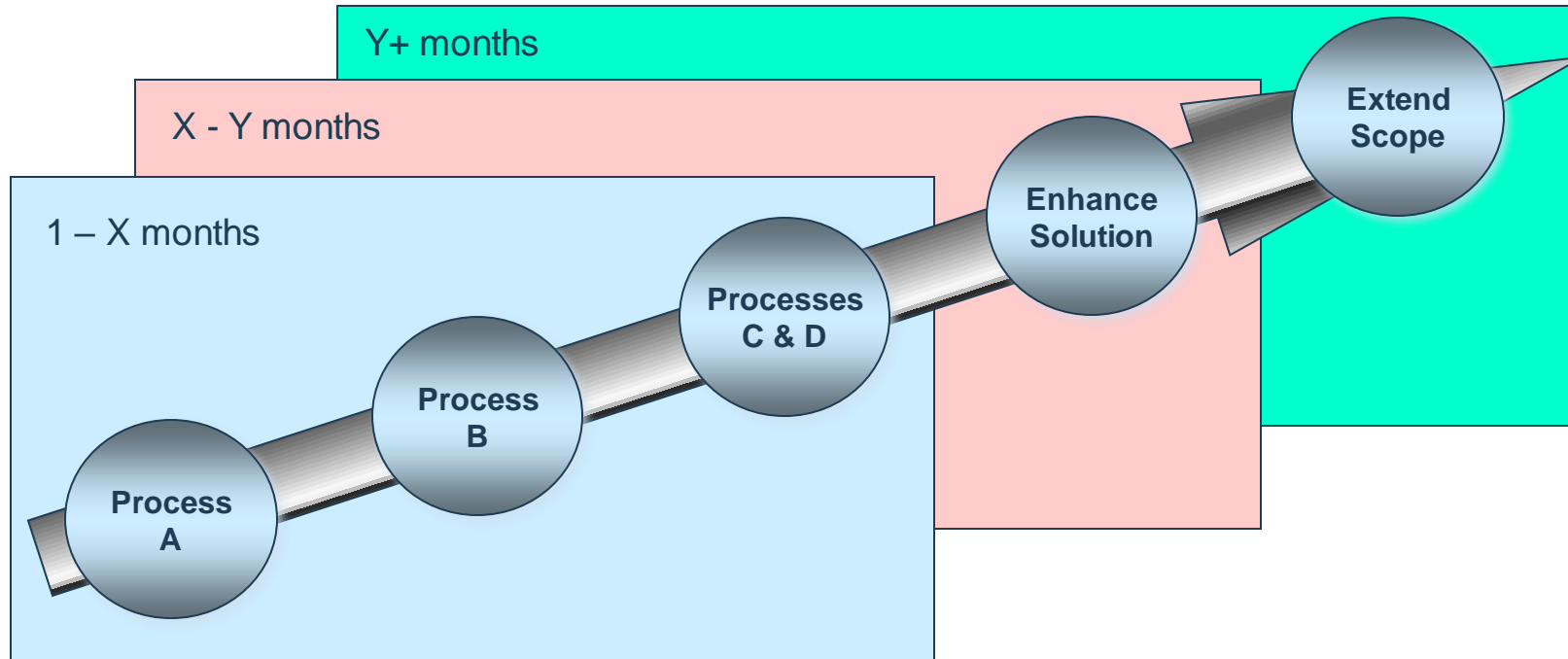
 - It’s all about making process part of the management philosophy



Roadmap Example #1



Roadmap Example #2

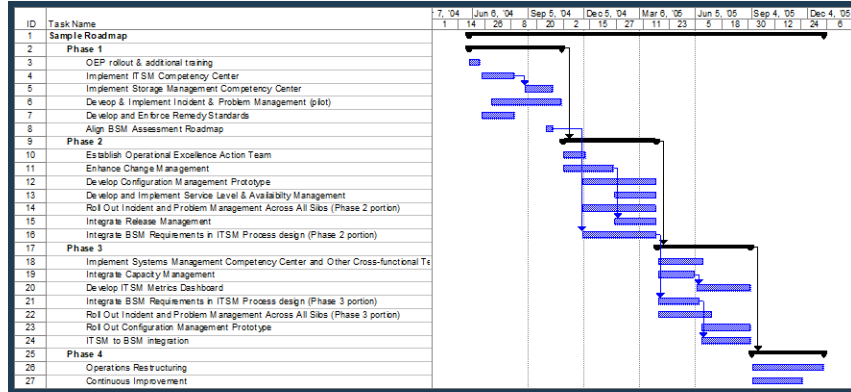


ID	Task Name	May	June	July	August	September	October	November	December	January	February	March	April	May
1	Implementation Plan													
2	Phase 1													
3	Implement ITSM Competency Center													
4	Implement Storage Management Competency Center													
5	Develop & Implement Incident & Problem Management (pilot)													
6	Develop and Enforce Remedy Standards													
7	Align BSM Assessment Roadmap													
8	Phase 2													
9	Establish Operational Excellence Action Team													
10	Enhance Change Management													
11	Develop Configuration Management Prototype													
12	Develop and Implement Service Level & Availability Management													
13	Roll Out Incident and Problem Management Across All Sites (Phase 2 portion)													
14	Integrate Release Management													
15	Integrate BSM Requirements in ITSM Process design (Phase 2 portion)													
16	Phase 3													
17	Implement Other Cross-functional Teams													
18	Integrate Capacity Management													
19	Develop ITSM Metrics Dashboard													
20	Integrate BSM Requirements in ITSM Process design (Phase 3 portion)													
21	Roll Out Incident and Problem Management Across All Sites (Phase 3 portion)													
22	Roll Out Configuration Management Prototype													
23	ITSM to BSM integration													
24	Phase 4													
25	Operations Restructuring													
26	Continuous Improvement													



Roadmap Contents

TIMELINES



ROLES & RESPONSIBILITIES

Role	Resource Requirement	Type	Hours Year 1
Process Owner	One process owner per maximum of 5 processes = 2 persons @ 10% each	Ongoing	400
Process Manager	One Process Manager per process = 2 persons @ 50% (Incident, Change) + 8 persons @ 10% (other Processes)	Ongoing	2,000 1,600
Process Administrator	To be determined based on the individual process	Ongoing	TDB
Competency Center Manager	Coordinates the activities of the various competency centers, one competency center manager for each of the four competency centers = 4 persons @ 20%	Ongoing	1,600
Competency Center Team	Provides input / subject matter expertise within their various areas 1 to 2 full time people per team 5 to 6 part-time people per team @ 10%	Ongoing	16,000 4,800
Process Design Lead	Expert in the area of process design, technical design, training, communication and implementation <u>Estimate:</u> 2 to 3 consultants @ 3 months / major process 2 consultants @ 2 months / minor process	Design Phase (consultant)	TBD
Process Design Team	Various subject matter experts to help define requirements / build process Up to 12 SME @ 12.5 hours / SME / Process	Design Phase	150 per process
Remedy Sponsor	A senior sponsor that can ensure the standards are adopted across the organization 1 person @ 5%	Ongoing	200
Remedy Team lead	Coordinates the activities of the Remedy standards group	Ongoing	200
Remedy Team members	Various subject matter experts to help define requirements / build standards 4 people @ 10%	3 month project	800

RESOURCE ESTIMATES

Role	Description	Grade Level
Executive Sponsor	Responsible for visibly supporting the initiation, deployment & ongoing support of the process	SVP
Process Owners	Responsible for ensuring cross-functional roll out and consistent execution of the process	Dir
Process Manager	Responsible for the day to day execution of the process	Manager
Process Administrator	Performs specific tasks related to the process. i.e., reviewing change records for accuracy	TBD (depends on process)
Competency Centers	Established to help break down silos and to promote standards and best practices. Includes ITSM, Operational Action Team, Storage Management and Systems Management	CP Advisory Role
Center Manager	Coordinates the activities of the various competency centers	Dir
Center Team	Provides input / subject matter expertise within their various areas	Dir or Mgr
Process Design	The activities associated with the design, development and implementation of ITIL based processes	
Design Lead	Expert in the area of process design, technical design, training, communication and implementation	CP Team
Design Team	Various subject matter experts to help define requirements / build process	Multiple Levels
Remedy Standards	Ensure standards exist regarding Remedy development, testing, customization and roll out	CP Advisory Role
Sponsor	A senior sponsor that can ensure the standards are adopted across the organization	Dir
Team lead	Coordinates the activities of the Remedy standards group	Mgr
Team members	Various subject matter experts to help define requirements / build standards	Multiple Levels



Beyond the Assessment

Design

- Project Launch
- Background Data Gathering
- Process Ownership
- Process Design Workshops
- Process Documentation
- Technical Design Document
- Communication and Training Document
- Design Phase - Interim Report

Develop

- Acquisition of new technology.
- The establishment of a development environment.
- Solution Development
- Training and Communication
- The selection of the pilot environments.
- Conduct Pilot
- Development Phase - Interim Report

Deploy

- This phase will consist of the execution of the detailed roll out plan developed in the Develop phase



The End

