PRECISION STUDIO

A LEADER IN EFFECTIVE COMMUNICATION

Project Management Methodology

Implement SubPhase

Course Purpose

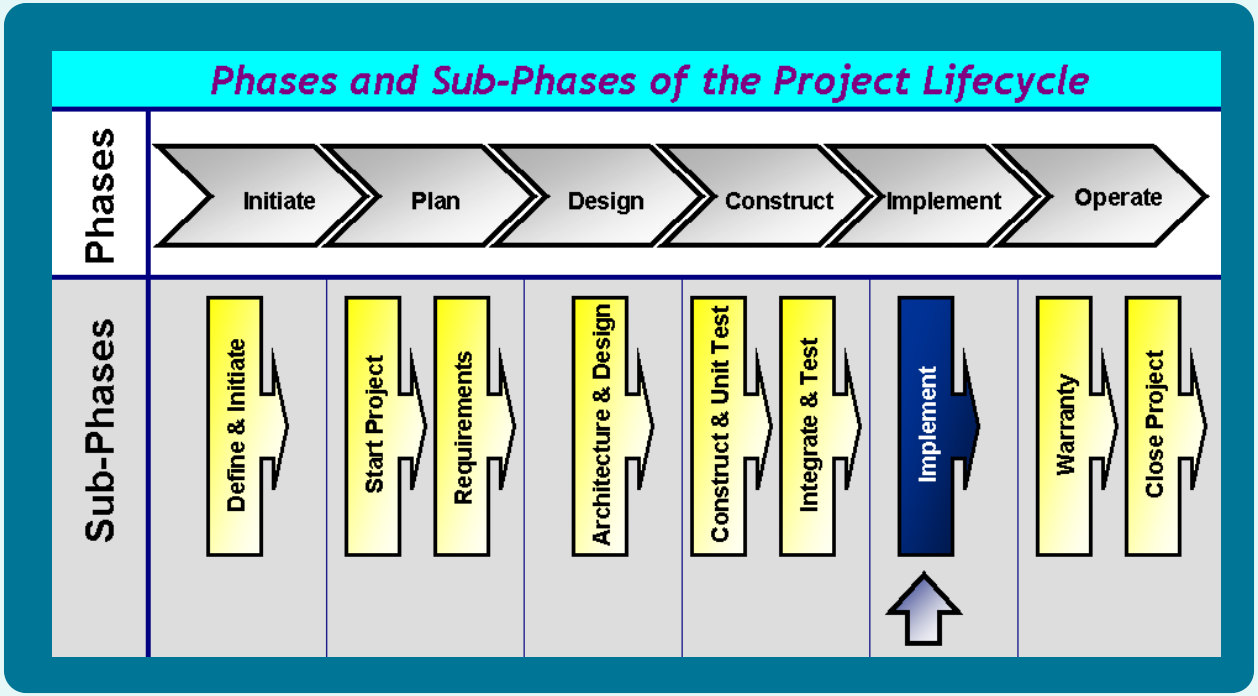
- Familiarize team members with the Implement Sub-Phase processes.
- Understand process flows, team member roles, and artifacts employed.
- Employ the course concepts to participate as a team member in the preparation of critical sub-phase deliverables.

Implement Sub-Phase

Agenda

- Course Outline
- The Project Lifecycle
- Sub-Phase Purpose
- Team Members
- Inputs/Outputs
- Overview of Sub-Phase Processes

The Project Life Cycle

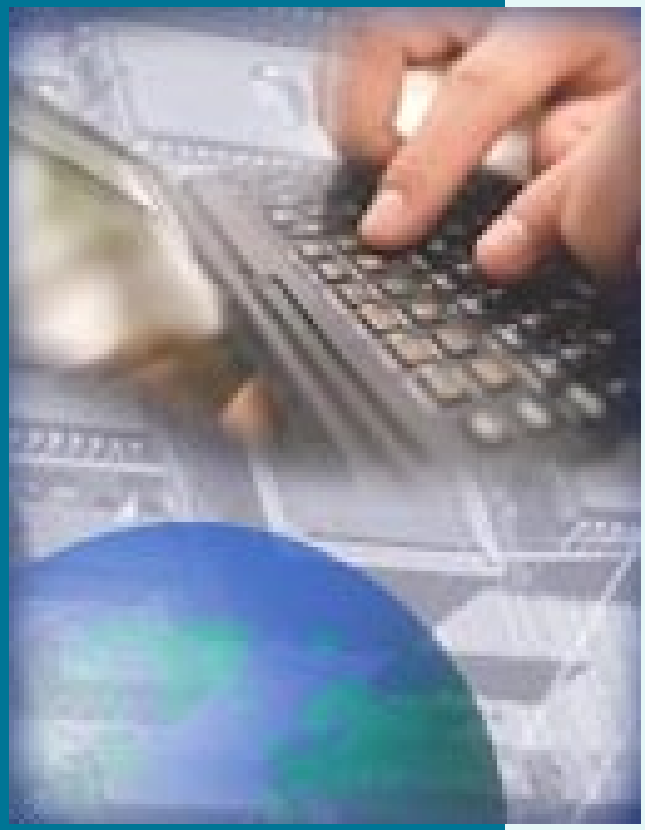


- A Project Solutions Methodology defines a standard project lifecycle.
- The Implement Sub-Phase is executed during the Implement Phase of the standard project lifecycle.
- It is the only sub-phase in the Implement Phase

What makes a ‘Good’ Implement?

- An implementation has been successful if the following is true:
  - New or modified processes have been established
  - Organizations, roles, and responsibilities have been assigned
  - Stakeholders have been prepared according to plan via communications, training, and incentives
  - Systems have been installed.
- Note, however, that a “good” Implement does not necessarily translate into a “good” project. A “good” project is one whose target metrics are achieved as a result of the Implement. Because many target metrics must be realized over time, whether a project has succeeded may or may not be immediately ascertainable.

Implement – What Will You Accomplish?

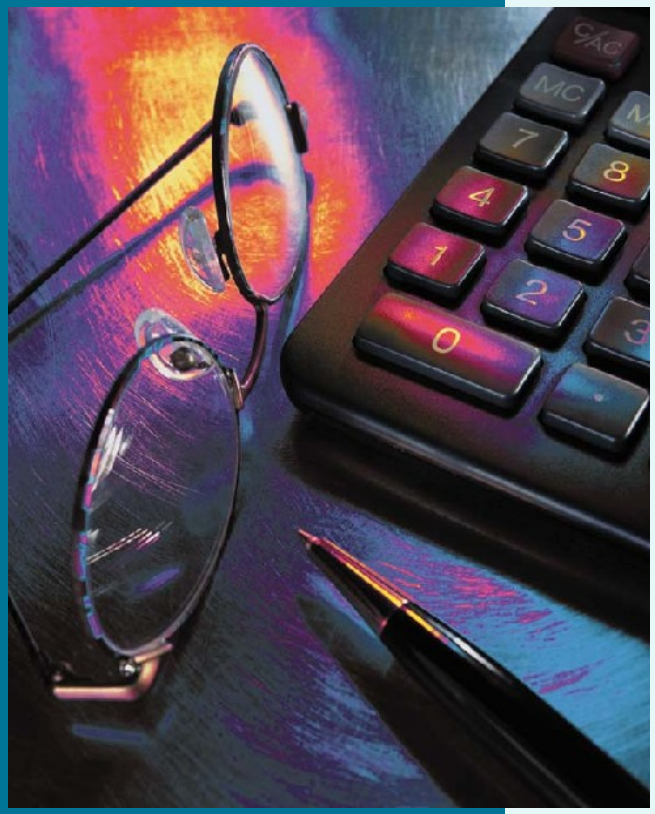


The purpose of the Implement Sub-Phase is to deploy the integrated project solution or solution release that was created to meet a specific set of business requirements and objectives. The solution release includes deliverables from all relevant subject areas, i.e.:

- Business Process
- Organization
- Application
- Data
- Technology.

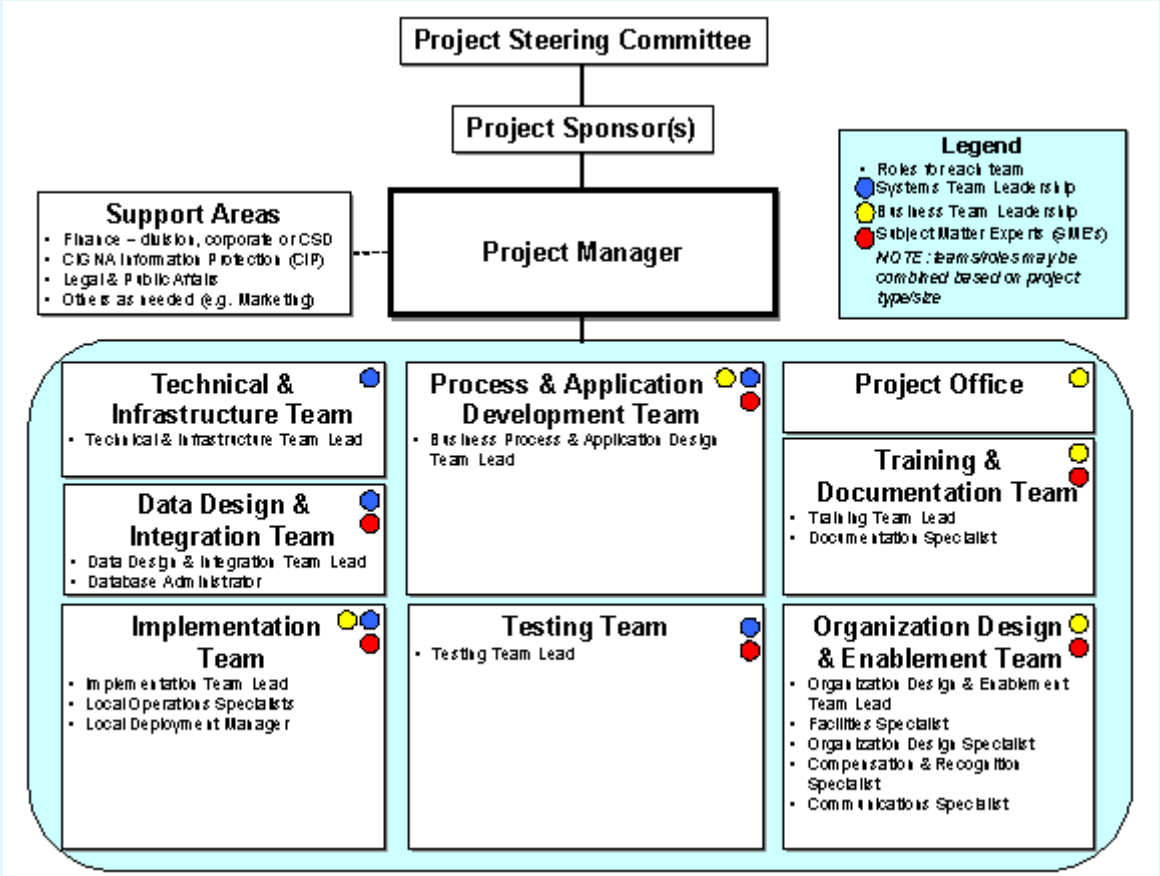
Implement occurs after all formal testing of solution elements is complete for a particular release, all major structural issues should have been worked out earlier in the project lifecycle.

Implement – What Will You Accomplish?



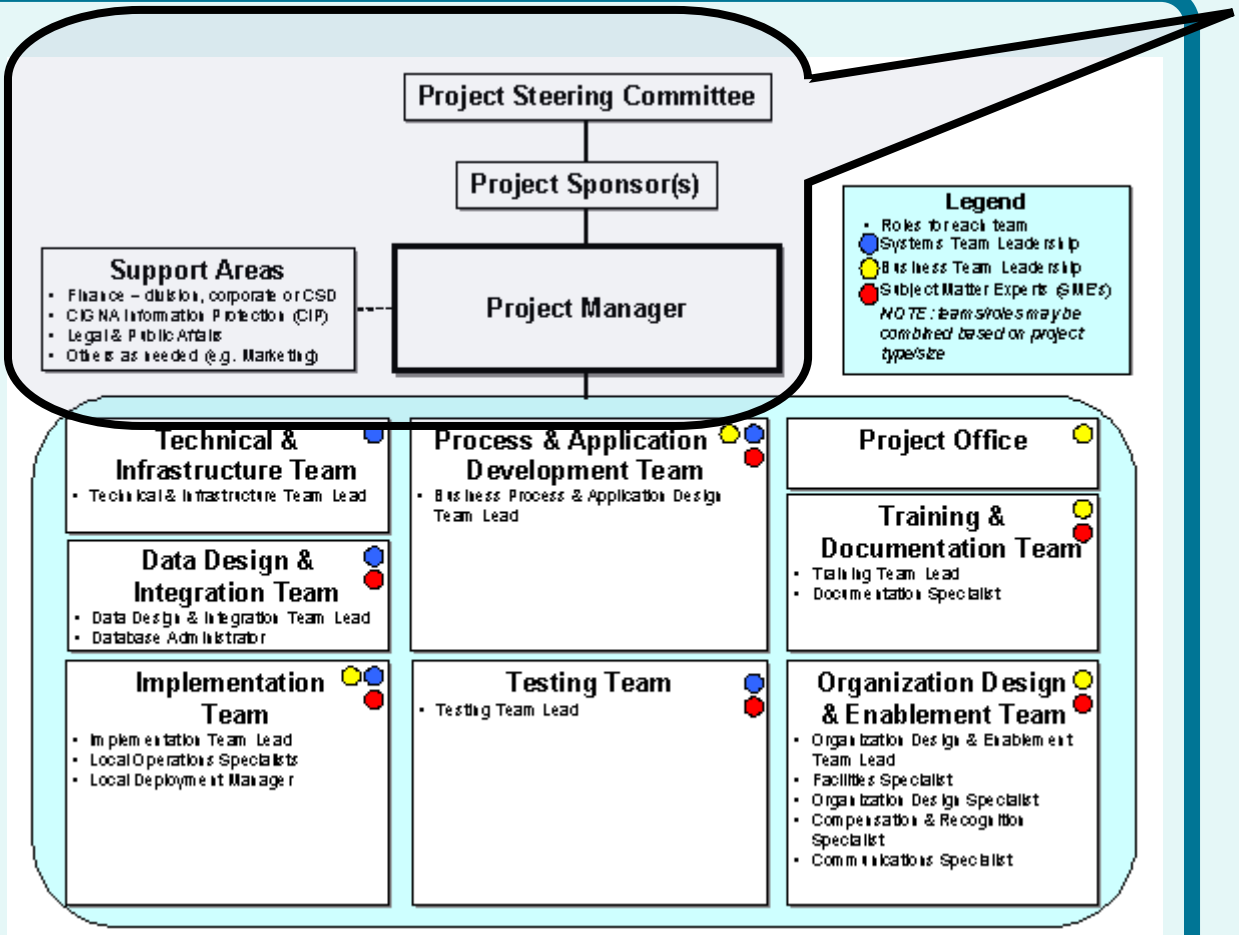
- The Implement Sub-Phase can span several release iterations, so, for some projects, the end of the Implement Phase will lead into the iterative nature of the methodology, returning the project to a previous phase to work on the delivered end product and produce its next generation.
- Other projects may be delivered in a single iteration. When a project release has completed the Implement Sub-Phase, it is ready to enter the Warranty Sub-Phase of the Operate Phase.
- Ultimately, by the time a project ends, all project artifacts will have been turned over to a third party who will become responsible for operations, maintenance and enhancements of the delivered solution.

Who Are Your Team Members?



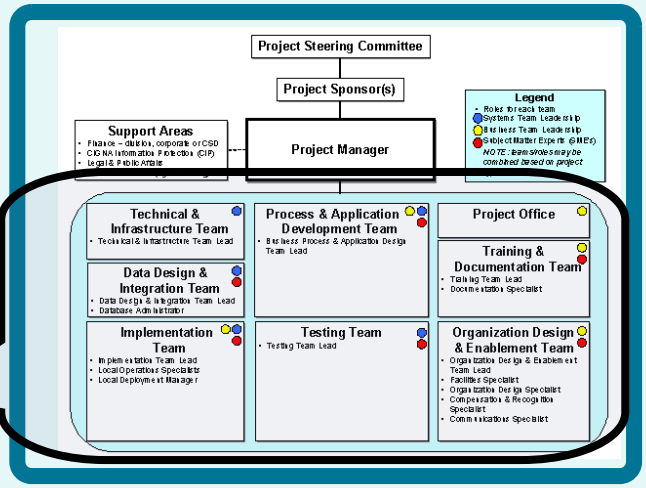
- Individuals with the appropriate skills collaborating to drive a successful project.
- Team roles are subdivided according to functional requirements.

The Management Team



- The Steering Committee provides senior management oversight and direction for a project.
- The Project Sponsor/Business Partner is the "owner" of a project.
- The Project Manager's primary responsibility is to manage and coordinate day-to-day project activities.
- Support Areas provide Subject Matter Expertise.

The Support Teams



Project Office
During the Implement Sub-Phase the project office will lead quality management activities. It may also maintain the detailed Implementation section of the Project Workplan, especially dependencies and time lines.

Process & Application Team
Business representatives on the team are responsible for making process changes to the solution being deployed. System representatives are responsible for making application changes, including modifications to data conversion processing.

Technical & Infrastructure Team
The Technical & Infrastructure Team is responsible for procuring, configuring, fine-tuning and implementing all system software and hardware elements of the solution architecture. This team is also responsible for creating the user Ids and access privileges.

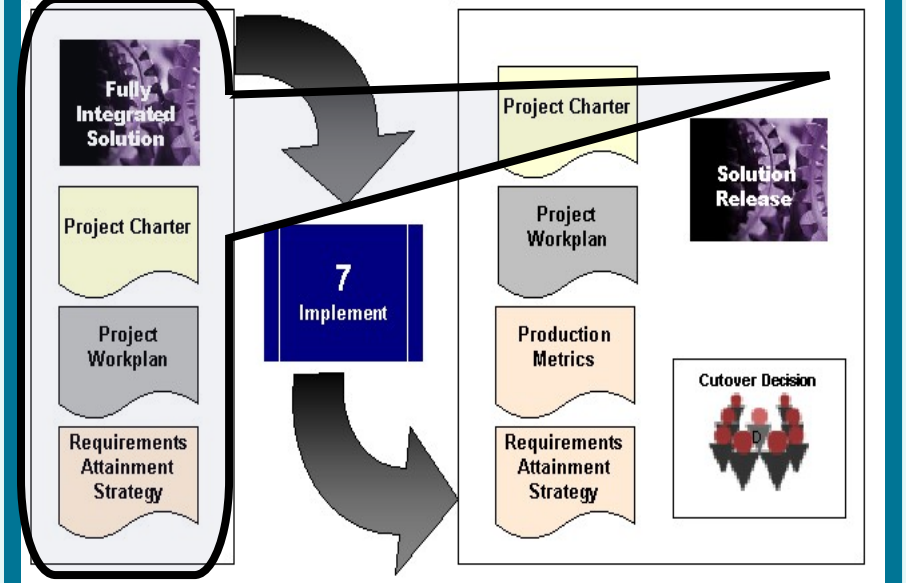
Data Design & Integration Team
The Data Design & Integration Team is responsible for fine-tuning all data stores.

Organization Design & Enablement Team
The Organization Design and Enablement staff is responsible for making organizational changes requested as a result of the initial deployment. These changes might include those to roles and responsibilities and the Work Force Enablement Strategy.

Training and Documentation Team
The Training staff is responsible for making changes to educational materials requested as a result of the initial deployment. Documentation staff is responsible for changes to operations manuals for both business and systems areas.

Implementation Team
The Implementation Team takes the lead during the Implement Sub-Phase. It is responsible for deploying the new system, processes, and roles and responsibilities to target stakeholders and for carrying out the System Implementation and Work Force Enablement Strategies. Finally, the Implementation Team is responsible for requesting necessary fixes and changes to the solution, and monitoring deployment results and effectiveness.

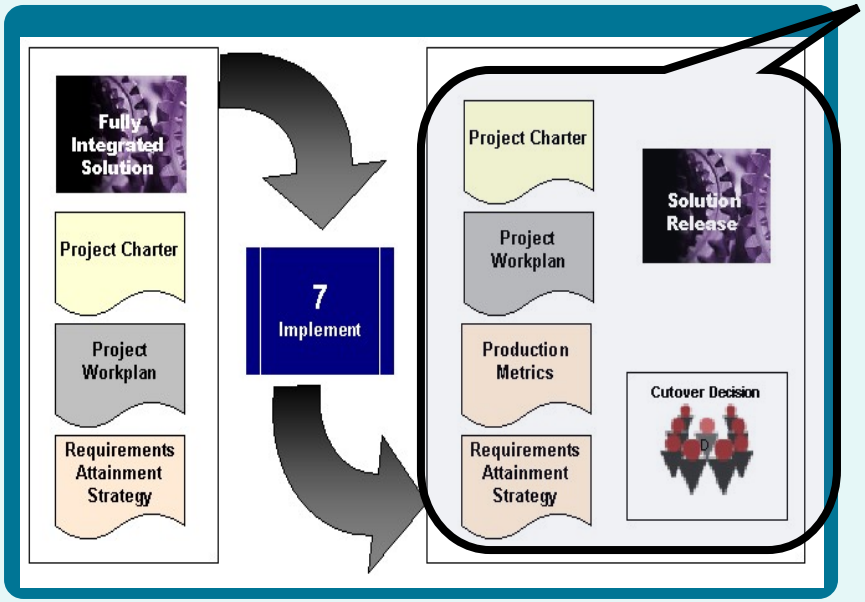
What are the Critical Inputs?



Key inputs to the Implement Sub-Phase consist of the following:

- **Fully Integrated Solution:** This deliverable is the fully tested, ready-to-implement solution that meets all of the requirements as specified – including requirements related to business process, technology, software applications, organizations, and work force enablement.
- **Project Charter:** This deliverable documents how the new functionality and operational changes will be released to the organization and identifies the list of subprojects related to each release.
- **Project Workplan:** This deliverable contains, among other things, the high-level activities, generic resources, and timing for executing the Implement Sub-Phase.
- **Requirements Attainment Strategy:** This composite deliverable, initially created during the Requirements sub-phase, consists of an up-to-date Requirements Management Strategy (including post-implementation procedures for monitoring solution results), Test Strategy, Work Force Enablement Strategy, and System Implementation Strategy.

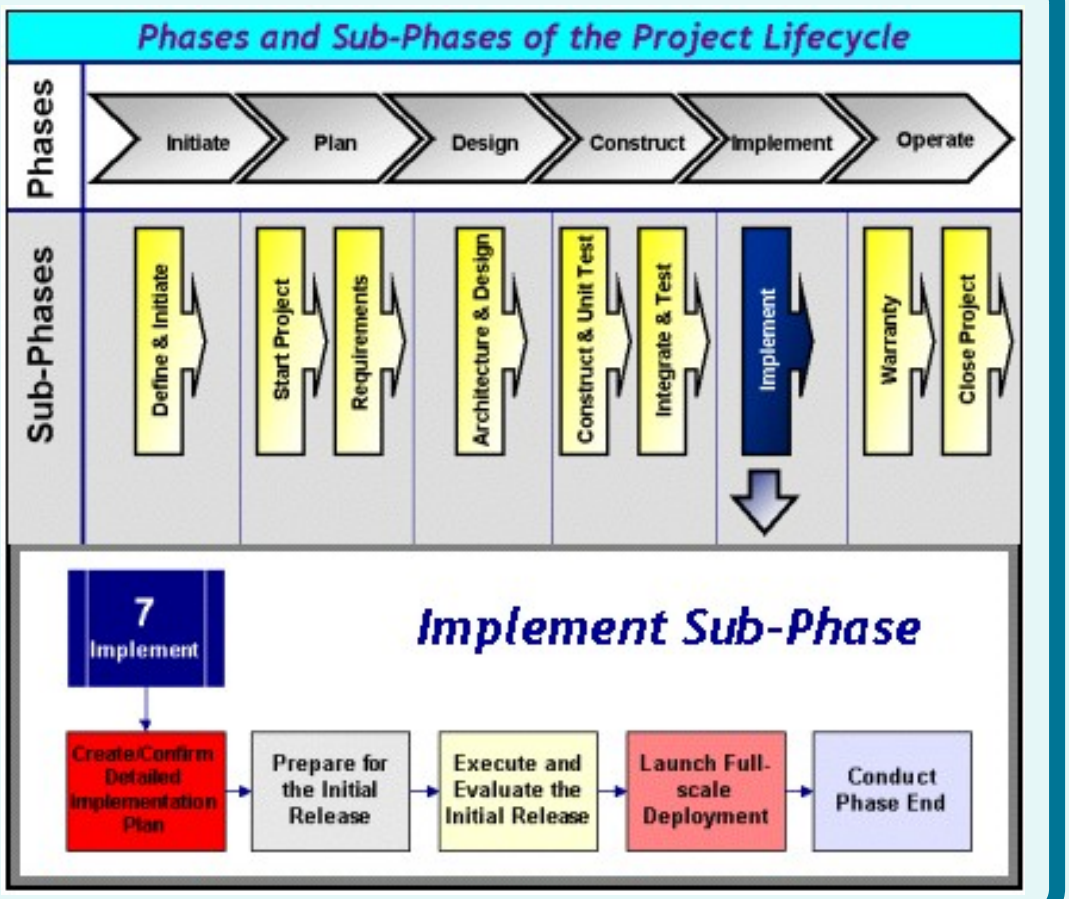
What Critical Outputs Will You Create?



Key outputs of the Implement Sub-Phase include:

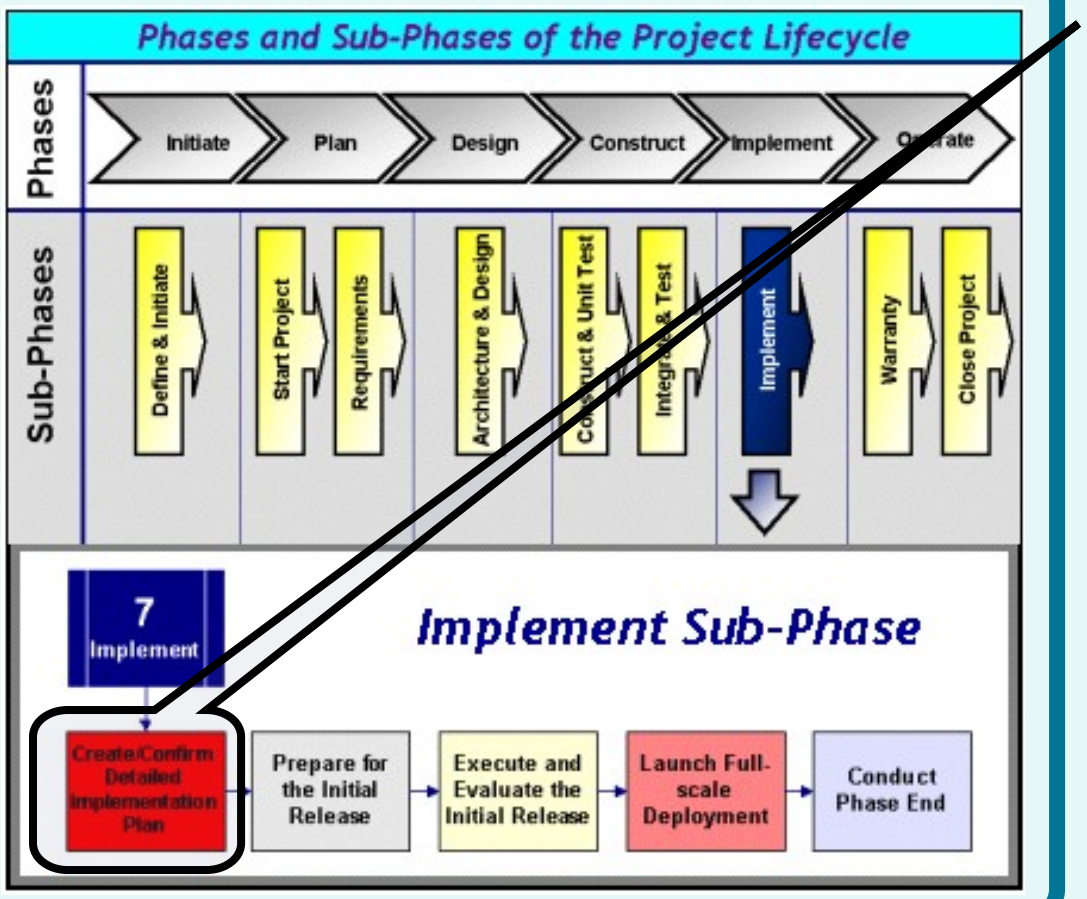
- **Project Charter (updated):** Includes the current project approach to developing and releasing the project solution.
- **Project Workplan (updated):** A detailed Implement section is added providing time frames, resources, dependencies, and deliverables for rolling out the project solution to target stakeholders according to the Requirements Attainment Strategy. If action items result from the initial implementation (or pilot), the workplan is updated to include related activities.
- **Production Metrics:** Requirements related measurements after each implementation for comparison to business and technical performance objectives established in the Requirements Sub-Phase.
- **Requirements Attainment Strategy (updated):** This composite deliverable is updated to include sufficient detail for ensuring that Requirements Management, Work Force Enablement, and System Implementation tasks are completed correctly.
- **Solution Release:** The fully integrated solution architectures for the current release are installed at target sites (which may or may not include a pilot site).
- **Cut-Over Decision:** The cut-over decision is truly a culmination of all the effort to date. It is the final decision to go or not go forward with full deployment based on the results of the initial implementation (or pilot).

How Does the Sub-Phase Breakout?



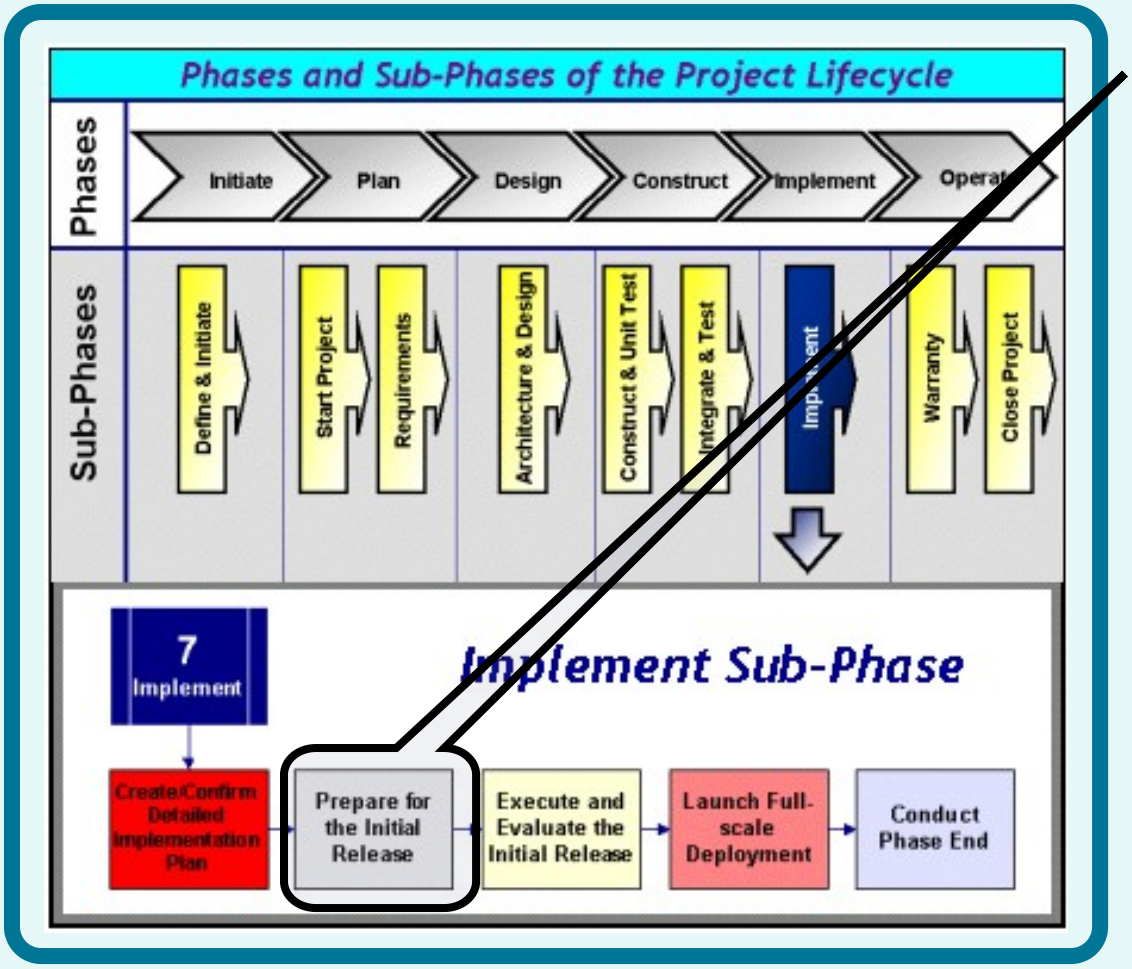
- The *Implement* sub-phase is broken into five processes.
- Depending on your role, you participate in one or more of the processes.

Create/Confirm Detailed Implementation Plan



- Confirm/update the approach to rolling out the project solution as described in the Project Charter.
- Confirm/update the System Implementation section of the Requirements Attainment Strategy.
- Confirm/update the approach to training and communications in the Work Force Enablement section of the Requirements Attainment Strategy.
- Create the detailed Implementation section of the Project Workplan to enact the Requirements Attainment Strategy.

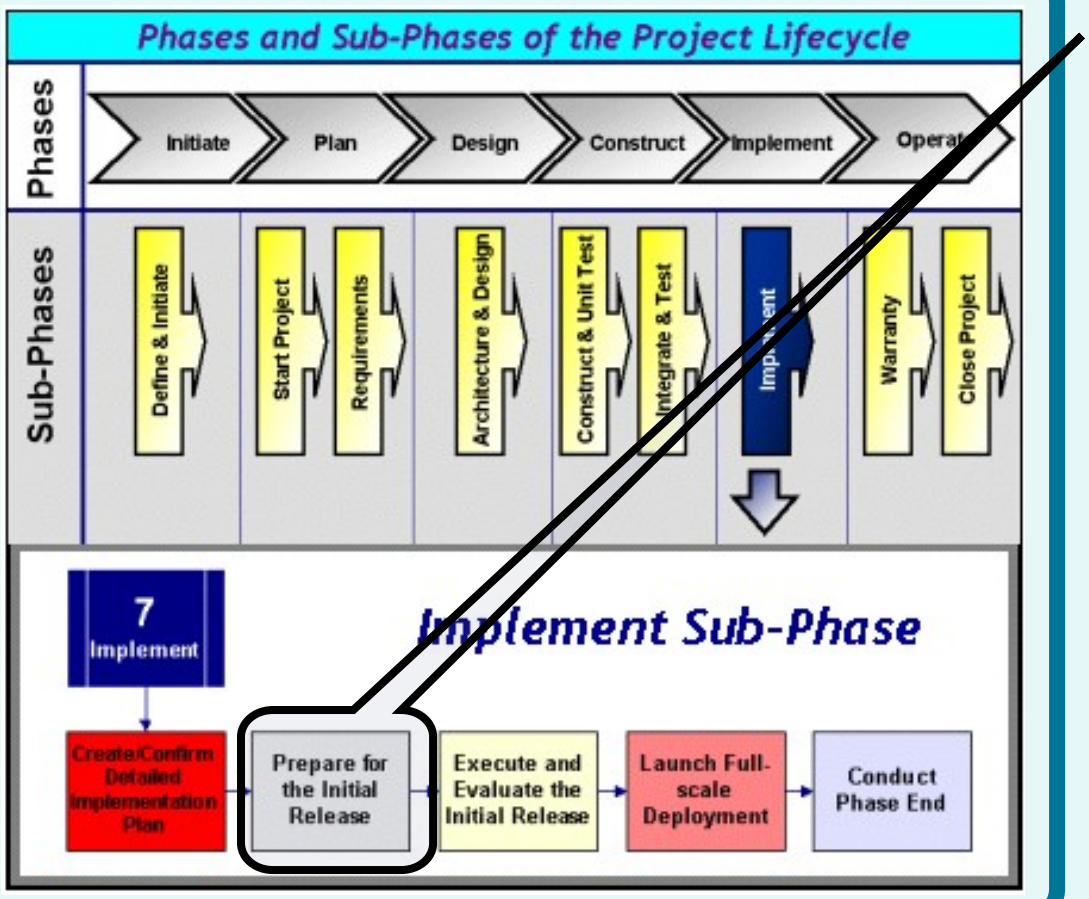
Prepare for the Initial Release



The first release of the project solution to production is treated as if it were a pilot. While not all projects require a pilot, piloting produces information that will help strengthen the solution and streamline the deployment process. This information, including lessons learned, are captured and considered when planning for full deployment.

Preparing for the first-release (or pilot) site will take significant effort. It requires the project team to do all of the same things that are necessary for a full deployment, but on a smaller scale. Real transactions will be executed, as opposed to simulated transactions used in the Integrate and Test Sub-Phase. True end-users of the system will be the executioners of the transactions as opposed to Testing Team members. Finally, production data or a copy of production data is used, as opposed to fabricated or ‘made-up’ data. Project team leads should take note of any problems during the initial release that will need to be addressed prior to full deployment into production.

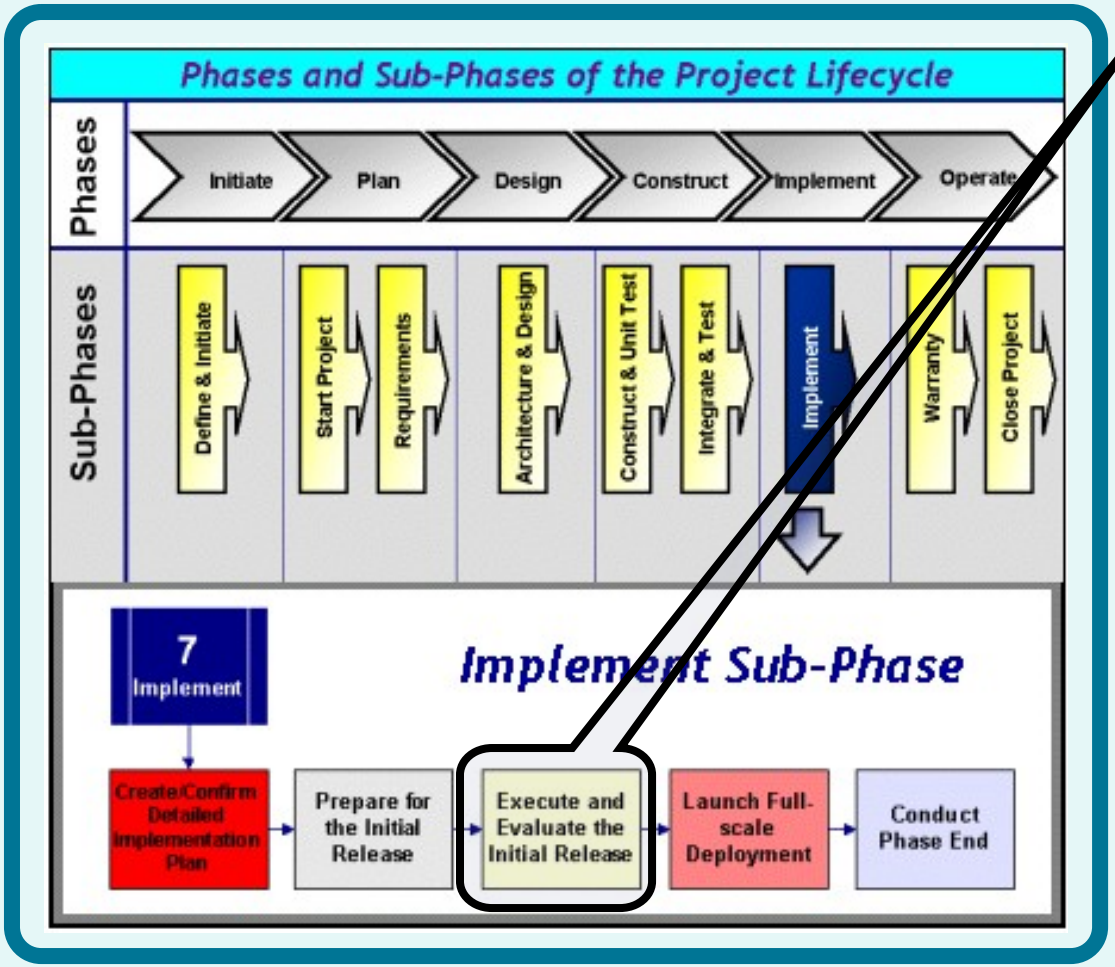
Prepare for the Initial Release



This process is broken out into 6 sub-processes:

- Set Up Metrics Gathering Procedures
- Prepare the System Environment
- Educate and Prepare Target Stakeholders
- Prepare the Help Desk
- Conduct Site Readiness Assessment
- Make Cutover Go/No-Go Decision

Execute and Evaluate the Initial Release



The initial release to production (pilot or not) produces information that will help strengthen and streamline the full-scale deployment process. During this period, the solution (people, process, and system) should operate in a live environment. If a pilot is being conducted, it should operate as close to a live scenario as possible, and as many different situations and transactions as possible should be exercised for and by the system and staff.

As a result of the initial release, lessons are captured and used to modify solution elements, strategies, and plans. In each specialty area --- process, organization, application, data, and technology --- the initial implementation provides a chance to experience the unexpected and modify solution elements accordingly.

Execute and Evaluate the Initial Release

During execution, observe the operation of the business process and compare it to stated objectives in areas such as:

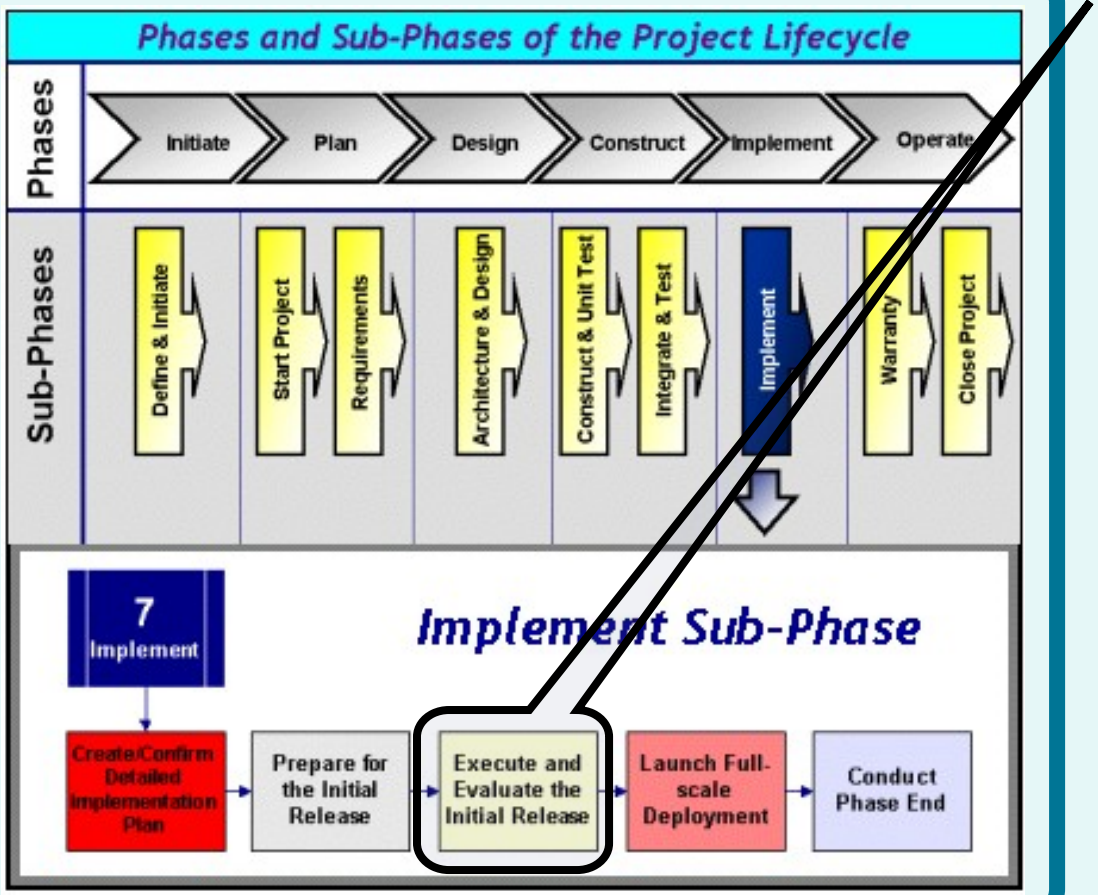
- Quality of process outputs
- Time to complete process tasks
- Response of client's customers
- Effectiveness of organization support systems
- Effectiveness of reward and recognition systems
- Organization morale, regulatory bodies, or labor unions

Work with the Implementation Team and management to:

- Identify problems as soon as possible
- Record problems
- Submit Change Requests/Problem Reports to the release board if resolution affects base-lined products, particularly if it affects the architecture or design
- Resolve outstanding problems or schedule them for resolution in subsequent releases.

Tune the business processes, using either a system-based or process-based approach. For example, modify application tables to add a missing order type or create a manual workaround to compensate for sourcing plan that is not yet online. Identify those problems that cannot be resolved with the timeframe of this sub-phase.

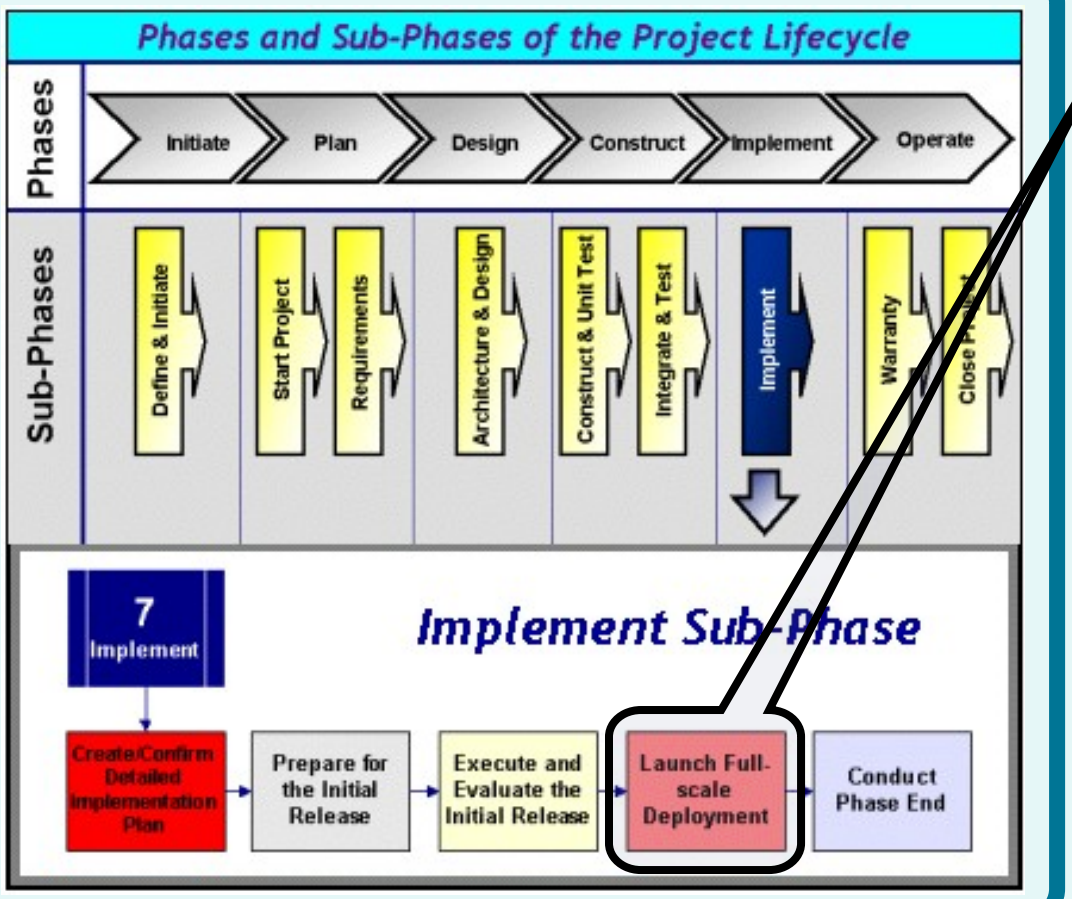
Execute and Evaluate the Initial Release



This process is broken out into 6 sub-processes:

- Perform Initial Implementation
- Evaluate Business Process Performance
- Evaluate Organizational Transition
- Evaluate Overall System Performance
- Address Areas Needing Improvement
- Conduct Release Management Review

Launch Full-scale Deployment

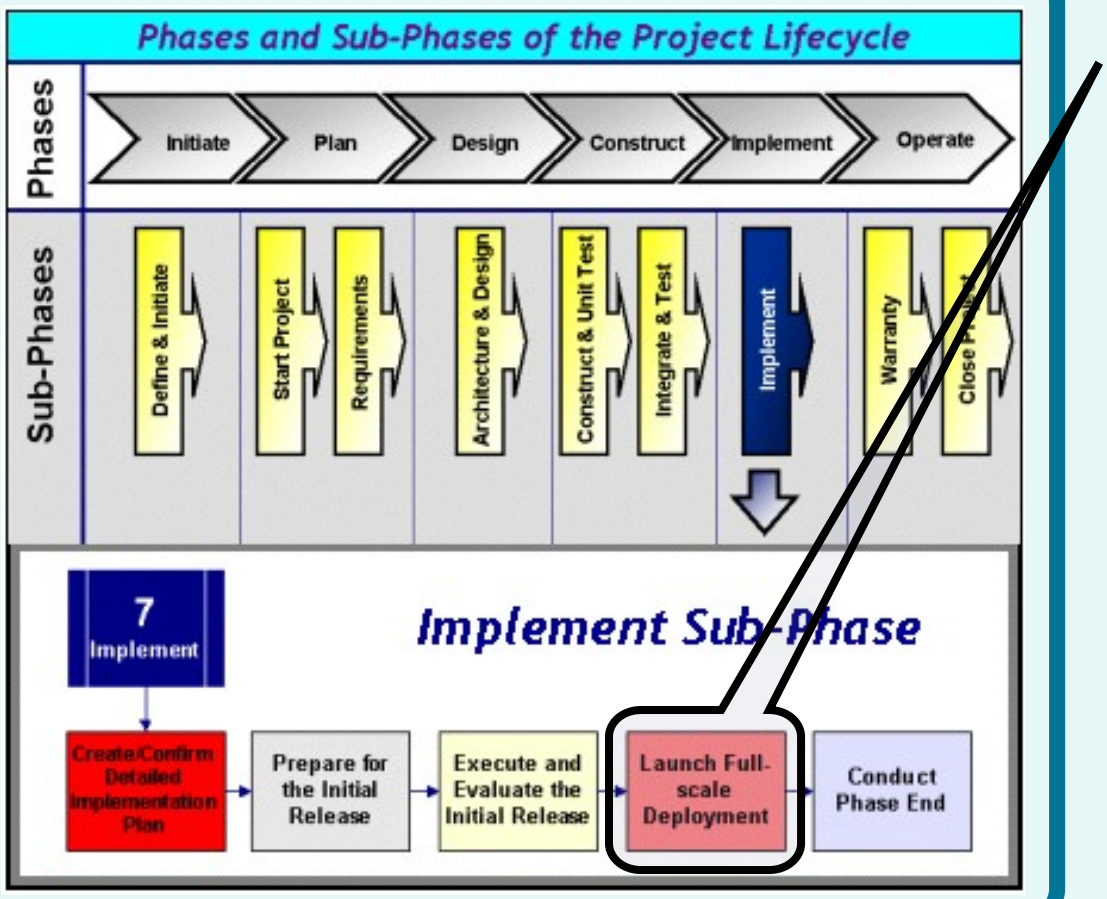


At this point, the initial implementation (or pilot) is considered a success, the release management team has assessed the situation, and they have decided to move forward with full deployment of the solution.

Paying close attention to lessons learned during the initial (or pilot) implementation, and using what was already developed as part of the detailed Implementation section of the Project Workplan, flush out the details of deployment for a *generic* target site. Include activities, dependencies, and scheduling.

Be sure to remove site-specific activities, dependences, resource names, and scheduling that you may have picked up unintentionally from the initial (or pilot) implementation.

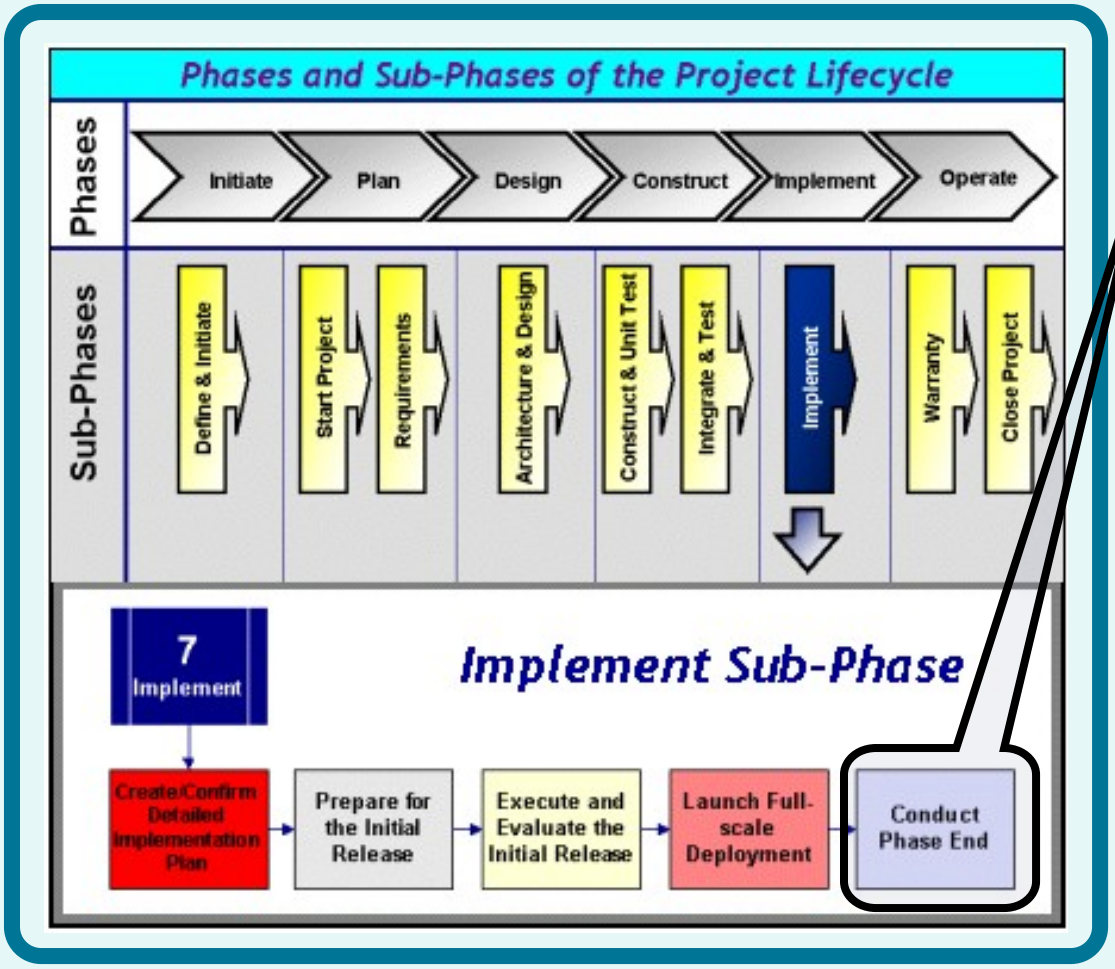
Launch Full-scale Deployment



Once the generic plan is completed, review it with management and operations teams *from each deployment site* in order to identify any site-specific variants.

Repeat all activities from handbook processes 2.0 Prepare for the Initial Release and 3.0 Execute and Evaluate the Initial Release, adapting any activities to the needs of each deployment site.

Conduct Phase End



The standard project phases, as defined in the project lifecycle, incorporate phase end gates or "decision points" to allow for a senior management review.

Just as a Business Case (with Cost Benefit Analysis) is presented to senior management for funding in the Define & Initiate Sub-Phase, additional validations of the project are performed at the subsequent phase end gates (e.g. Plan, Design, Construct).

Implement Summary

Purpose

- **The purpose of the Implement Sub-Phase is to deploy the integrated project solution or solution release that was created to meet a specific set of business requirements and objectives.**

Team Roles

- **Steering Committee, Project Sponsor, Project Manager, Support Areas, Project Office, Process and Application Team, Testing Team, Technical and Infrastructure Team, Data Design and Integration Team, Organization Design and Enablement Team, Training and Documentation Team, Implementation Team.**

Major Inputs

- **Fully Integrated Solution**
- **Project Charter**
- **Project Workplan**
- **Requirements Attainment Strategy**

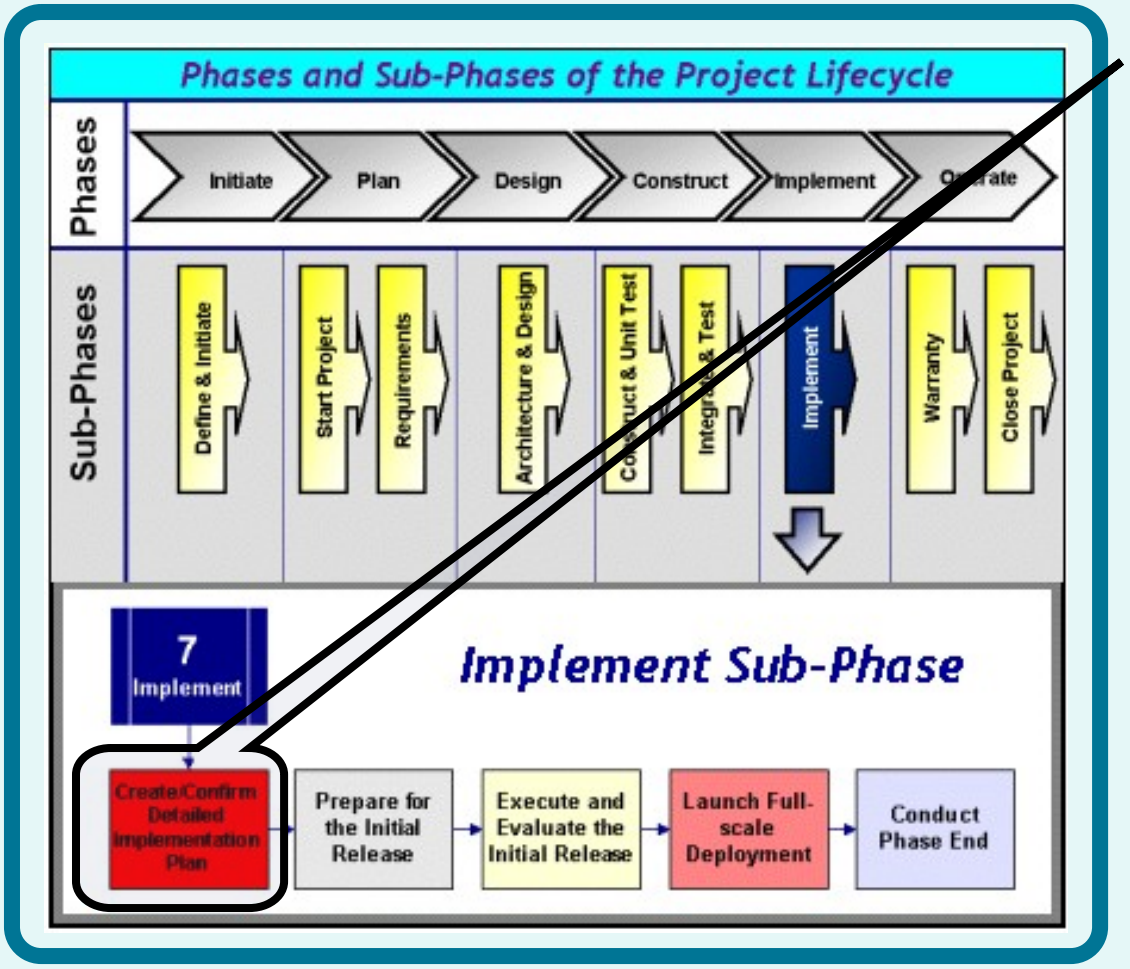
Major Outputs

- **Project Charter (updated)**
- **Project Workplan (updated)**
- **Production Metrics**
- **Requirements Attainment Strategy (updated)**
- **Solution Release**
- **Cut-Over Decision**

Processes

- **Create/Confirm Detailed Implementation Plan**
- **Prepare for the Initial Release**
- **Execute and Evaluate the Initial Release**
- **Launch Full-scale Deployment**
- **Conduct Phase End**

Details - Create/Confirm Detailed Implementation Plan



- Confirm/update the approach to rolling out the project solution as described in the Project Charter.
- Confirm/update the System Implementation section of the Requirements Attainment Strategy.
- Create the detailed Implementation section of the Project Workplan to enact the Requirements Attainment Strategy.
- Confirm/update the approach to training and communications in the Work Force Enablement section of the Requirements Attainment Strategy.

Create/Confirm Detailed Implementation Plan

Details - Create/Confirm Detailed Implementation Plan

Confirm/update the System Implementation section of the Requirements Attainment Strategy.

- Be sure to address site-specific variants for the release, such as whether you will run the new system in parallel with the existing one or perform a cutover.

- (While running the systems in parallel lets you back out to the original system if the new one has problems, parallel operations require significant effort from everyone involved. Users must do double entry, the operations staff must run both systems, the support staff must support two systems, and the development staff may need to create integration code that temporarily works behind the scenes to synchronize data. For many systems, particularly those supporting online customers via the Internet, a cutover is the only option. Few customers would be willing to place orders or service requests with two versions of the same website. With a straight cutover, plan for the downtime when the cutover occurs - a period that could last from a few seconds to a few hours or even a few days. The ability to back out is critical with this approach, requiring additional resources to develop and test restores scripts. In fact, many system deployment efforts fail because the development team did not consider how to back out the new system, only to discover that they had to do so because of an unforeseen problem during installation.)

Create/Confirm Detailed Implementation Plan

Details - Create/Confirm Detailed Implementation Plan

Create the detailed Implementation section of the Project Workplan to enact the Requirements Attainment Strategy.

- Create the detailed Implementation section of the Project Workplan to enact the Requirements Attainment Strategy, and determine how the solution will be rolled-out to the end-user community of specific target sites. Specify what, when, and who will execute these activities.
- An effective detailed Implement plan includes go and no-go checkpoints at which you determine whether deployment efforts are on time and working smoothly. If you do not have these crucial checkpoints, consider stopping and de-installing to a known and safe state from which to attempt deployment later. Never assume that your deployment will go smoothly.
- Most of the following considerations will have been addressed during the Requirements and Architecture & Design Sub-Phases and should have been documented in the Requirements Attainment Strategy. However, the details (who, what, when) by which the plan is carried out must be resolved in the detailed Implement section of the Project Workplan for the following areas:
  - Education and Preparation of End-Users
  - Communications
  - System Help-Desk
  - Technical Environment
  - Documentation
  - Facilities.

Create/Confirm Detailed Implementation Plan

Details - Create/Confirm Detailed Implementation Plan

Confirm/update the approach to training and communications in the Work Force Enablement section of the Requirements Attainment Strategy.

- Be sure to address site-specific variants for the release, such as how training will be deployed without impacting current business activity and who specifically should deliver critical communications.

- Include details, such as where training facilities will be located and course set-up checklists. As part of training portion, name the training instructors, who will set-up the training rooms, when training materials need to be printed and bound, etc.

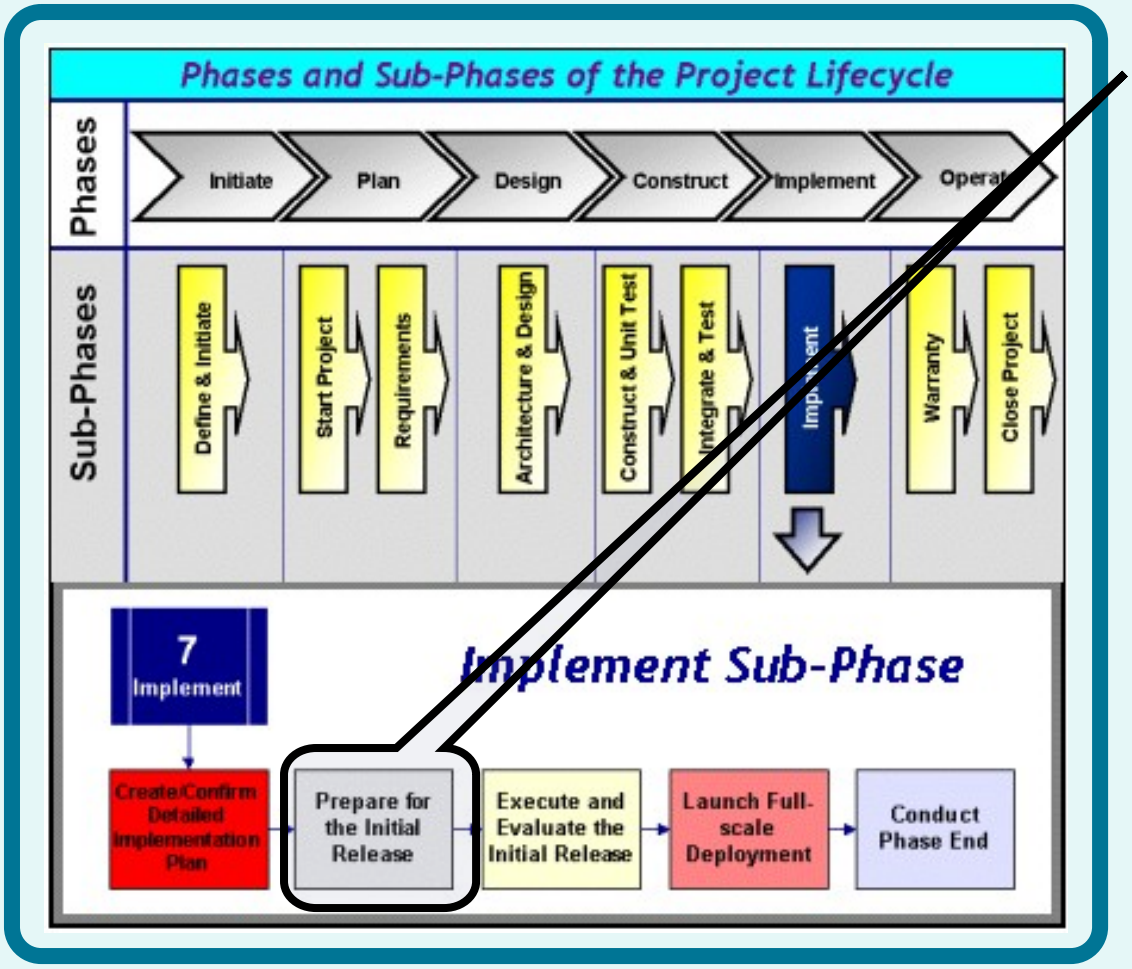
Create/Confirm Detailed Implementation Plan

Details - Create/Confirm Detailed Implementation Plan

Inputs & Outputs		
Inputs	Project Charter Project Workplan	Requirements Attainment Strategy Integrated Project Solution
Outputs	Project Workplan (detailed Implement section)	

Roles & Responsibilities	
Role	**Responsibility**
Project Manager	Executes this activity. Works with the other teams to determine the specifics for implementation activities and documents it in the detailed Implement section of the Project Workplan. Considers training, communications, help desk, technical environment, organization, and process changes.
Implementation Team Lead	Supports this activity. Provides local input regarding site-specific circumstances and workarounds that may be required during implementation, in addition to identifying who locally will be responsible for executing site-specific activities.
Technical & Infrastructure Team Lead	Supports this activity. Provides input regarding deployment of the initial implementation (or pilot) and production environments.
Training & Documentation Team Lead	Supports this activity. Provides input regarding implementing training and supporting documentation, such as Standard Operating Procedures.
Organization Design & Enablement Team Lead	Supports this activity. Provides input regarding implementing required facilities changes, communications strategy, and rewards & recognition strategy.
Process and Application Development Team Lead	Supports this activity. Provides input regarding implementing required process changes, both automated and manual.

Details - Prepare for the Initial Release



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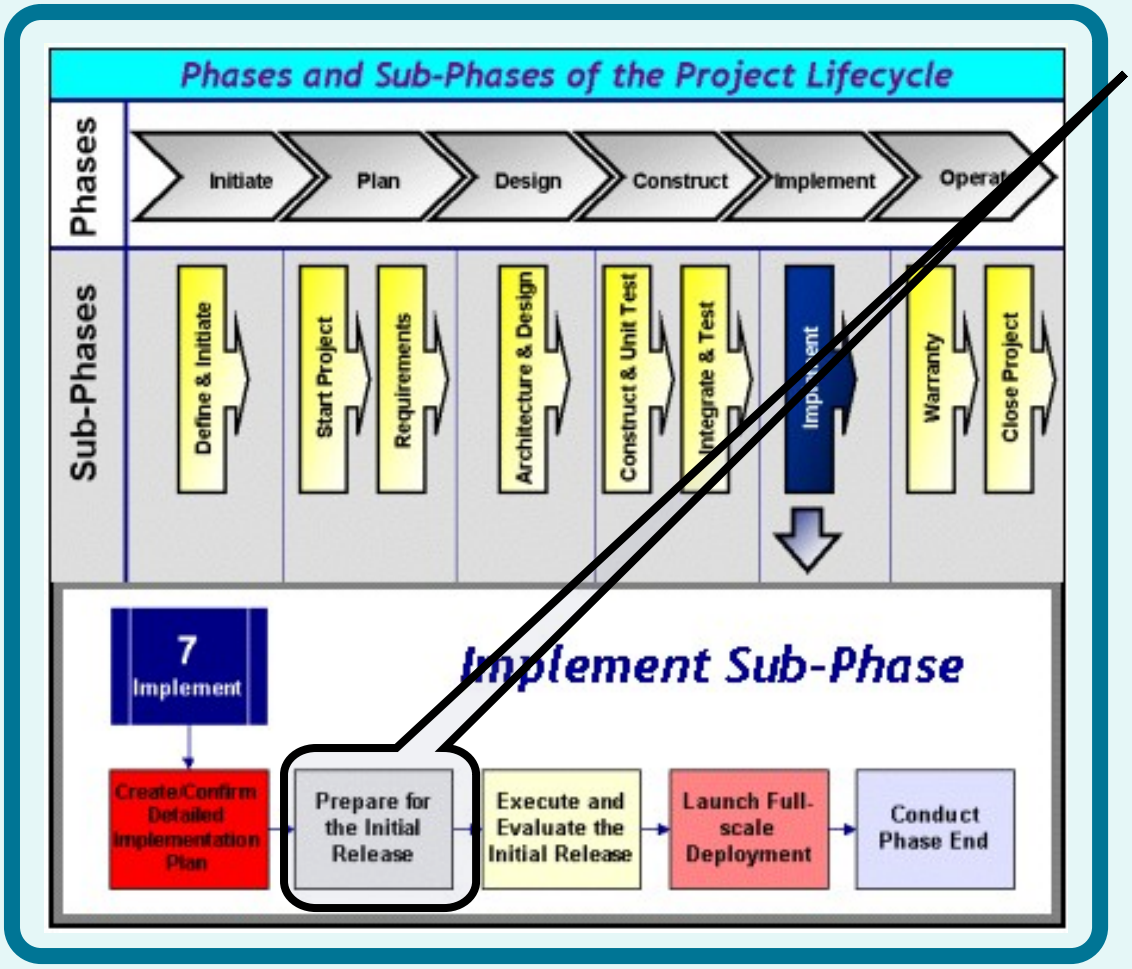

This process is broken out into 6 sub-processes:

- Set Up Metrics Gathering Procedures
- Prepare the System Environment
- Educate and Prepare Target Stakeholders
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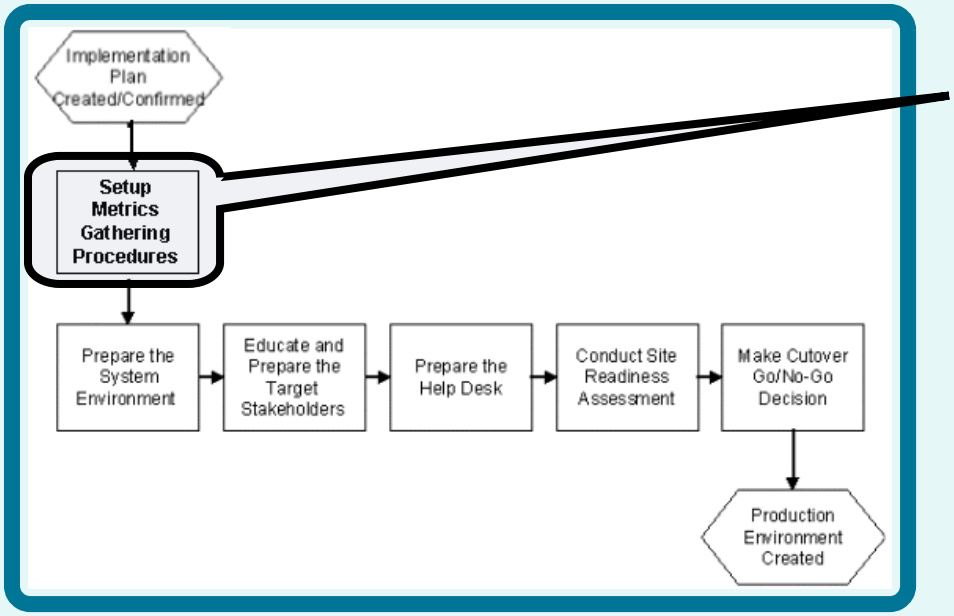
- Conduct Site Readiness Assessment
- Make Cutover Go/No-Go Decision

Set Up Metrics Gathering Procedures

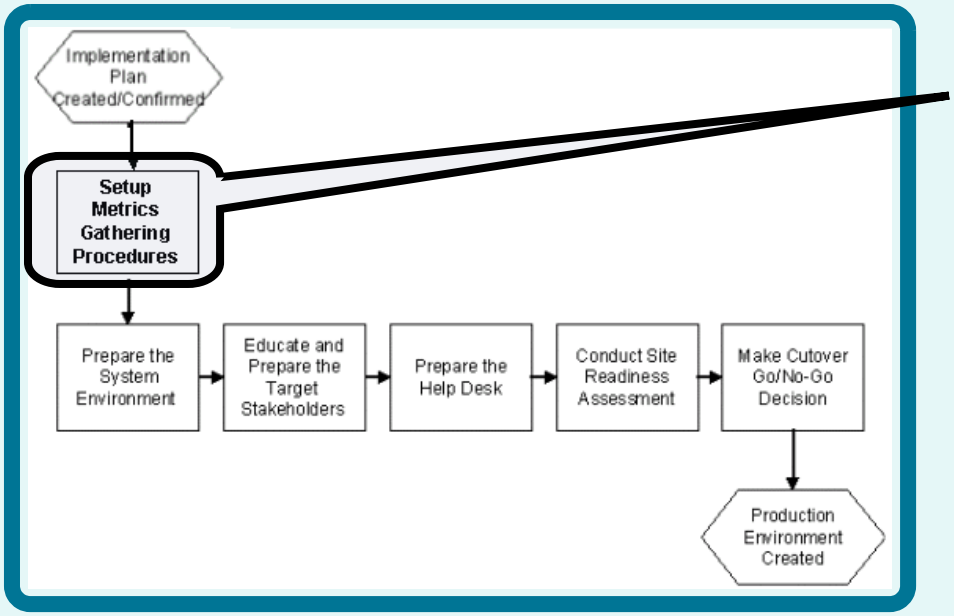


Review the Requirements Management section of the Requirements Attainment Strategy to understand the approach for gathering, monitoring, and addressing solution deficiencies in the production environment. Develop and ready supporting procedures for executing during the initial implementation (or pilot).

Review the Work Force Enablement section of the Requirements Attainment Strategy to understand the approach for transitioning the organization from current state to future state. Develop and ready supporting procedures for executing during the initial implementation (or pilot).

Prepare for the Initial Release

Set Up Metrics Gathering Procedures



Consider measuring the following to help determine how well the transition is going and if it's moving towards realization of project business objectives:

- Whether enablement activities are "to plan" and on schedule.
- Whether enablement activities are reaching the appropriate stakeholders.
- How well enablement activities are being implemented and their effectiveness; specifically whether targeted stakeholders have bought into the new business approach, activity, or situation.
- Whether business requirements are being met.
- Whether technical requirements are being met.

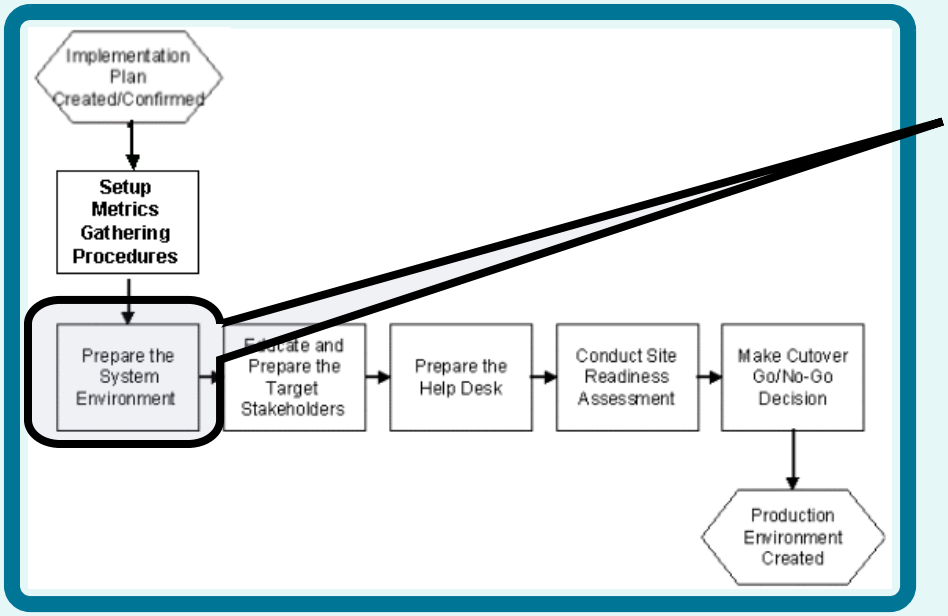
Set Up Metrics Gathering Procedures

Inputs & Outputs	
Inputs	Requirements Management section of the Requirements Attainment Strategy Work Force Enablement section of the Requirements Attainment Strategy Requirements Specification
Outputs	Metrics Gathering Procedures Requirements Management section of the Requirements Attainment Strategy

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Develops procedures for gathering implementation related metrics and analyzing same.
Implementation Team Specialists	Support this activity. Provide input on the best ways to assess progress for their areas of expertise, e.g. data, training, communications, etc.

Prepare for the Initial Release

Prepare the System Environment



Install the technical environment for deployment of the first-release site.

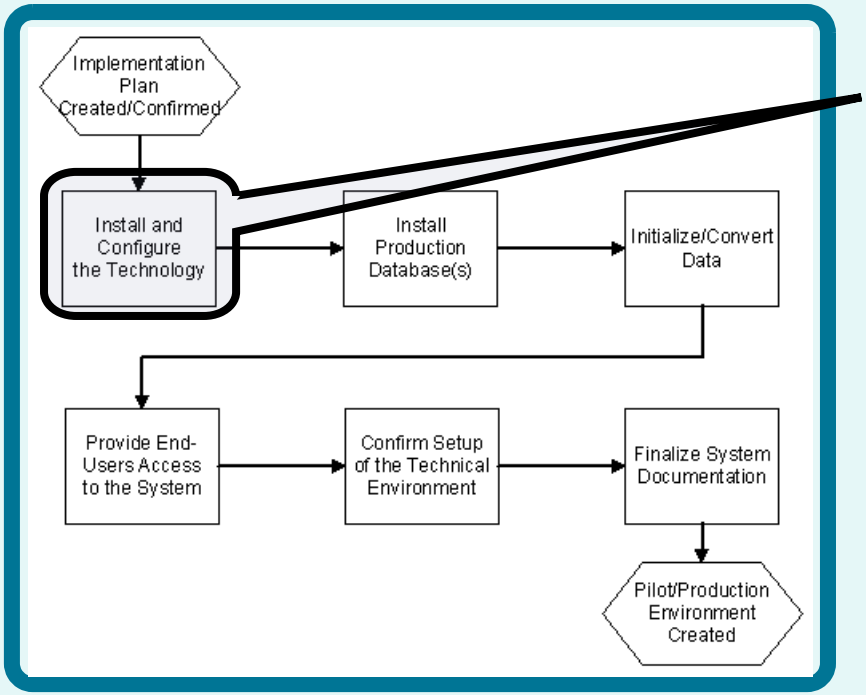
This process is broken out into 6 sub-processes:

- Install and Configure the Technology Infrastructure
- Install Production Database(s)
- Initialize/Convert Data
- Provide End-Users Access to the System
- Confirm Setup of the Technical Environment
- Finalize System Documentation

Prepare for the Initial Release

Prepare the System Environment

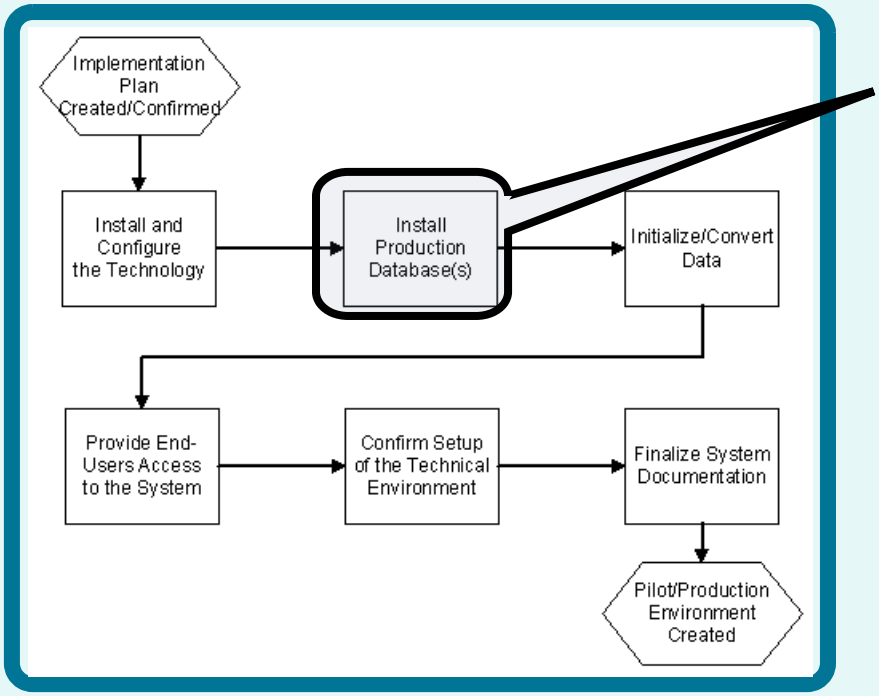
Install and Configure the Technology Infrastructure



- After infrastructure components have been procured, they are configured and built as documented within the Infrastructure Engineering Package (IEP). This activity includes staging, equipment installation, and facilities and infrastructure preparation. Infrastructure components are ready for testing after they have been configured. Most of this will already have occurred during the Construct and Unit Test Sub-Phase. However, it is possible that it may need to be done again for the pilot or the initial rollout. Since this activity must be completed in a production-supported environment, first complete a Production Readiness Assessment so that IOS is aware of all equipment entering a production-supported environment, its operating conditions, and how problems should be addressed to ensure service levels.

Prepare the System Environment

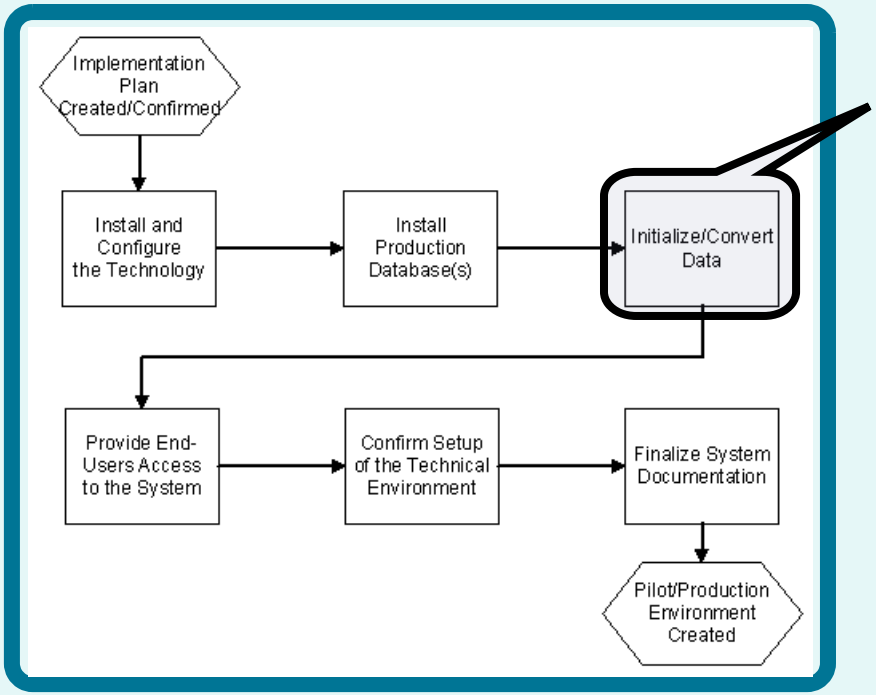
Install Production Database(s)



- With the technology infrastructure in place, it is time to install target database(s).

Prepare the System Environment

Initialize/Convert Data



Perform related initialization, conversion, and data-cleansing activities for relevant data stores.

Prepare the System Environment

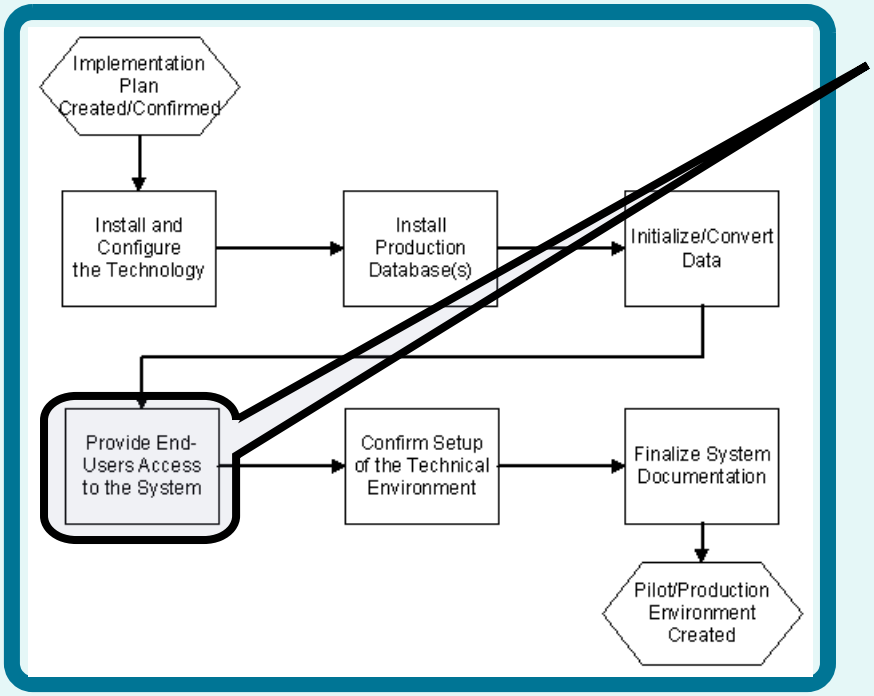
Initialize/Convert Data

Inputs & Outputs	
Inputs	Production Database(s) Conversion Strategy and Software
Outputs	Production Database(s)

Roles & Responsibilities	
Role	**Responsibility**
Database Administrator	Executes this activity. Grants production system access to end-users.
Business Systems Architect	Supports this activity. Provides input related to existing electronic data sources, quality, and relationships to other systems.
Business Analyst	Supports this activity. Provides input related to data sources, quality, and relationships to other systems and processes.

Prepare the System Environment

Provide End-Users Access to the System



- Grant production system access to end-users.
- Keep in mind that completion of training is usually a prerequisite for users to receive access.
- Distribute software in a controlled fashion, keeping a detailed distribution log.

Prepare the System Environment

Provide End-Users Access to the System

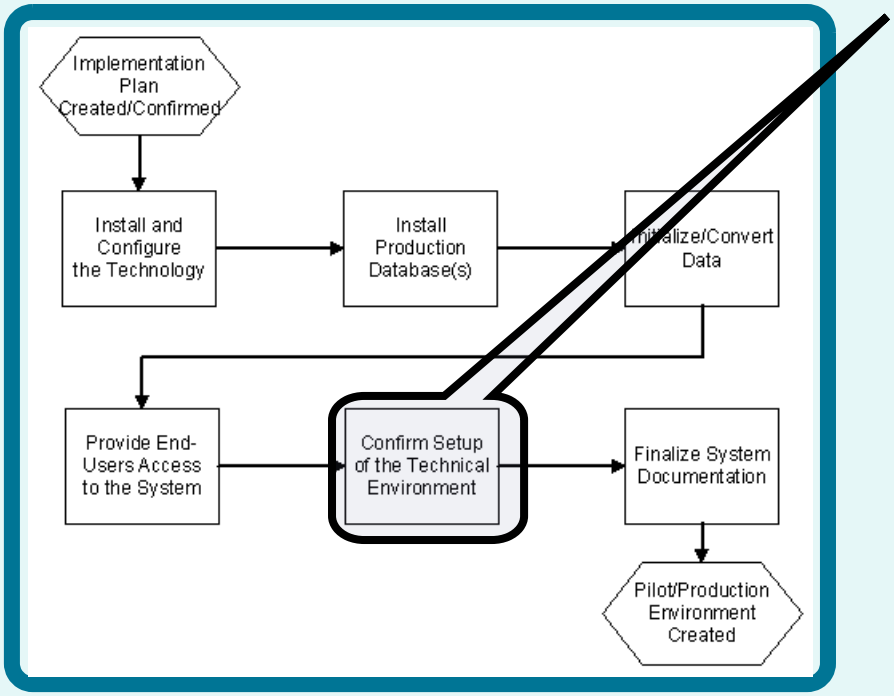
Inputs & Outputs	
Inputs	Information Security section of the Design Specification
Outputs	End – User Access Privileges

Roles & Responsibilities	
Role	**Responsibility**
Database Administrator	Executes this activity. Grants production system access to end-users.
Infrastructure Engineer	Supports this activity. Distributes software to the end-users in a controlled fashion. Keeps a detailed distribution log.

Prepare for the Initial Release

Prepare the System Environment

Confirm Setup of the Technical Environment



Verify that all technical elements of the project solution have been properly installed and readied for use. Review the data that has been initialized, converted and/or migrated. Do the following:

- Check the results of any data cleansing effort.
- Walk through the application, checking for any last-minute items that need resolution. Check the security set-up within the application.
- Compare the following areas to their expected results:
  - Online response times for significant or potential high-usage inquiries.
  - Traffic patterns and peaks, including hardware and network traffic analysis.
  - Capacity utilization.
  - High transaction volumes.
  - Downtime of any components of the system, and resulting impact.
- Contact the data center and confirm when the final cut-over will take place.

Prepare the System Environment

Confirm Setup of the Technical Environment

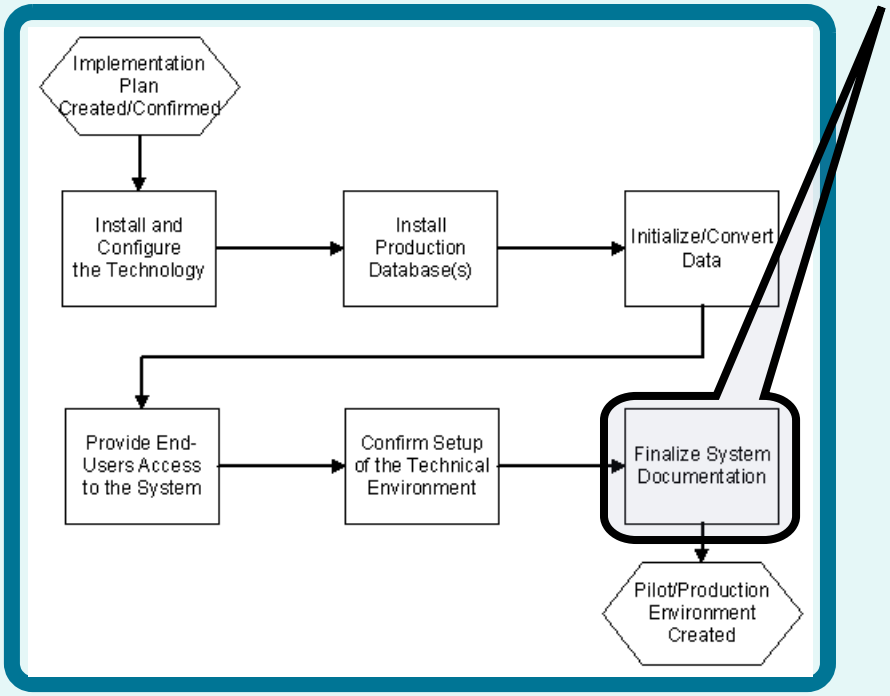
Inputs & Outputs	
Inputs	Integrated Project Solution (Data, Application, and Technology Infrastructure elements)
Outputs	Technical environment confirmed

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Ensures that all system related components and ready to implement (or pilot).
Database Architect	Supports this activity. Reviews the data that has been Converted and/or Migrated. Checks the results of the data cleansing effort.
Infrastructure Engineer	Supports this activity. Compares actual system performance (response time, traffic patterns, capacity utilization, transaction volumes, downtime) with specified performance.

Prepare for the Initial Release

Prepare the System Environment

Finalize System Documentation



Consolidate and verify previously created System Documentation into a single location for the initial release (or pilot). Take note that this will be the same system documentation used when the system is in production and fully deployed. This documentation should present detail of each core area within the application, from functional usage to technical specifications, including entity relationship diagrams for reference in the event of future customization.

Documentation should include:

- Run Books
- System Processes/Programs
- System Back-ups
- System Recovery/Catastrophe
- Maintenance
- Interface Programs
- System Architecture Diagram
- Reference Materials
- Functional Design
- Technical Design
- Design Specifications for Interface programs
- Design Specifications for Conversion programs
- Entity Relationship Diagram.

Prepare the System Environment

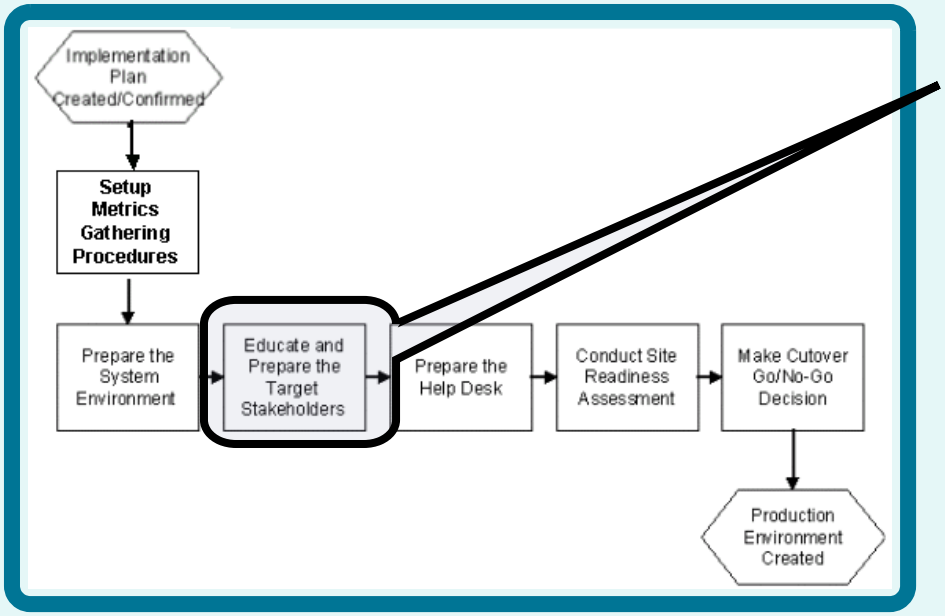
Finalize System Documentation

Inputs & Outputs	
Inputs	Design Specification Solution Architecture Requirements Attainment Strategy (particularly System Implementation Strategy) System Documentation (initial)
Outputs	System Documentation (finalized)

Roles & Responsibilities	
Role	**Responsibility**
Documentation Specialist	Executes this activity. Consolidates production Support Documentation into one location, presenting detail of each core area in the application.
Infrastructure Engineer	Supports this activity. Provides input based on technical infrastructure knowledge.
Business Analyst	Supports this activity. Provides input based on business process knowledge.
Business Systems Architect	Supports this activity. Ensures that the appropriate content is included in the final deliverable.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders



Train the end-users on the new/revised processes and system. Prepare them to take ownership of the system by ensuring that the training is effective and addresses how to accomplish their typical responsibilities.

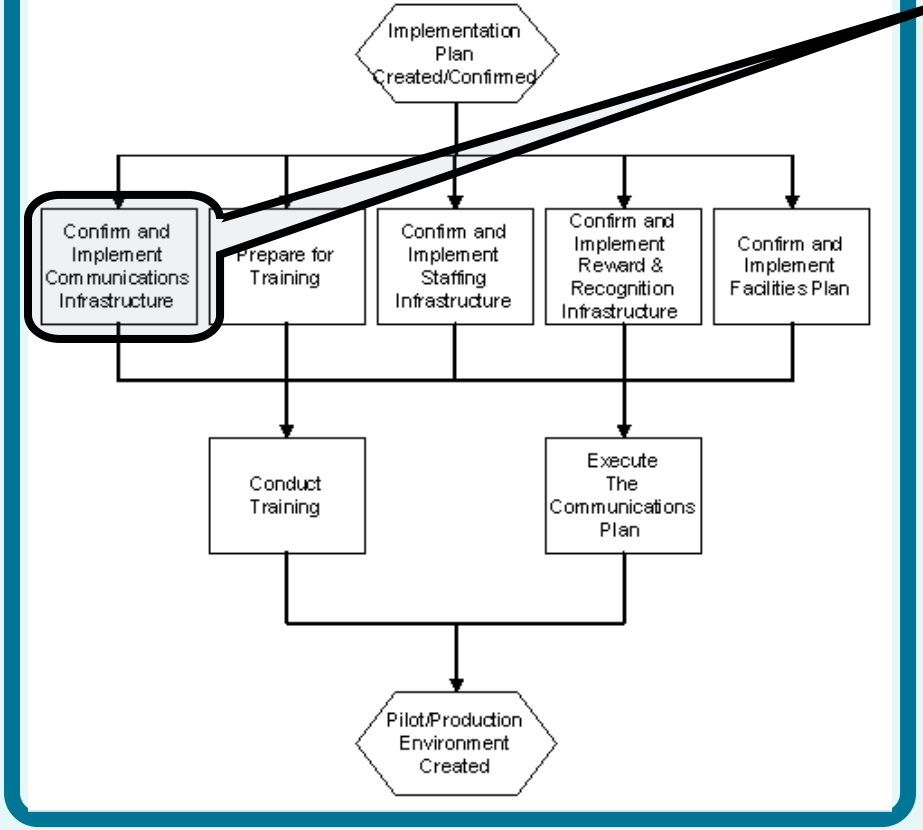
This process is broken out into 7 sub-processes:

- Confirm and Implement Communications Infrastructure
- Prepare for Training
- Confirm and Implement Staffing Infrastructure
- Confirm and Implement Reward and Recognition Infrastructure
- Confirm and Implement Facilities
- Execute the Communications Plan
- Conduct Training

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Confirm and Implement Communications Infrastructure



Review the Communications section of the Work Force Enablement Strategy to understand the approach.

Execute the plan to utilize channels of communication for stakeholder messages during initial implementation (or pilot) implementation.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

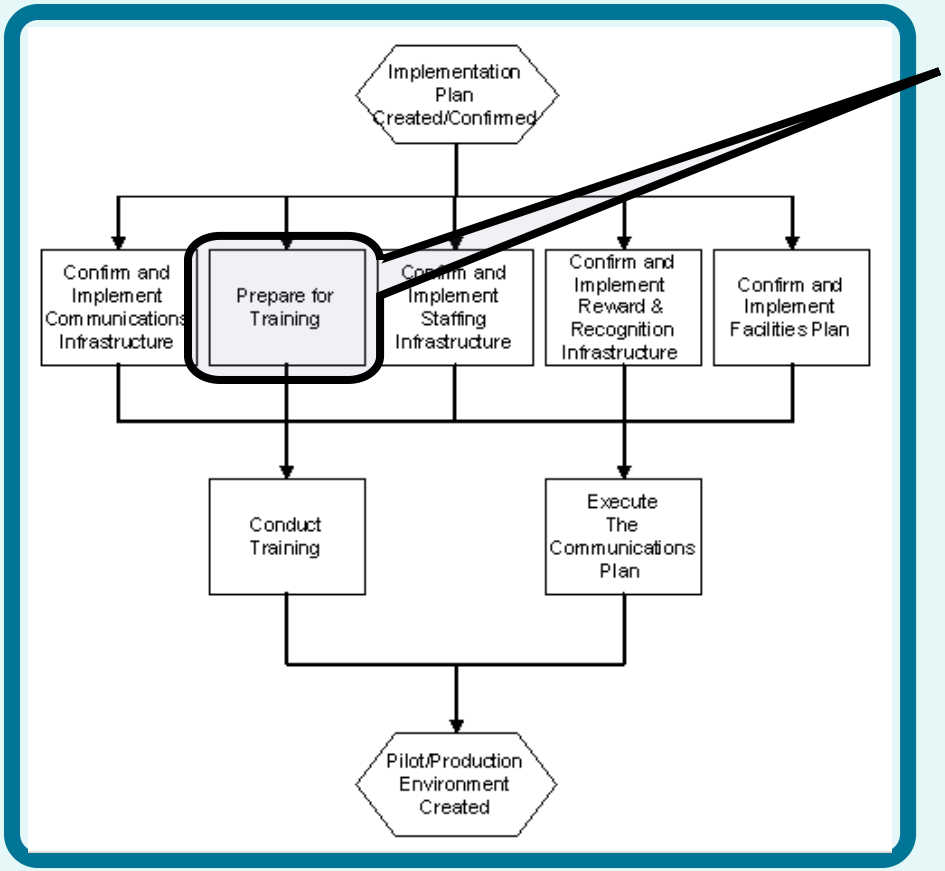
Confirm and Implement Communications Infrastructure

Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement section, Communication Approach)
Outputs	Communications Logistics Attended To
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Reviews the Communications section of the Work Force Enablement Strategy to understand the approach. Executes the plan to utilize channels of communication for stakeholder messages.
Communications Specialist	Supports this activity. Handles all communications related logistics.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Prepare for Training



Ensure that release-related courseware, class setting, and staff are ready. Schedule classes and notify the learners. Send learners any prerequisite reading material ahead of time. Train the training staff (Train-The-Trainer) to perform their roles in the learning process, giving them time to prepare and rehearse their instruction. Finally, prepare the area in which training will be conducted. Answer questions such as:

- How much space should we allocate for the classroom?
- Is there a configuration that works better than others? For example, is a wide and short classroom more appropriate than a square one?
- What type of seating arrangement should we use?
- How much table space should we allocate per student?
- Are computers needed? Will they be shared by more than one student?
- What visual aides are needed?

Note: Use this as an opportunity to provide basic training to your Help Desk. They can sign-up for classes that are not full, they can participate in instructor practice sessions, or you can create/add a class that is just for them. They should receive additional training from project team members that focuses on the area(s) they will primarily support

Educate and Prepare Target Stakeholders

Prepare for Training

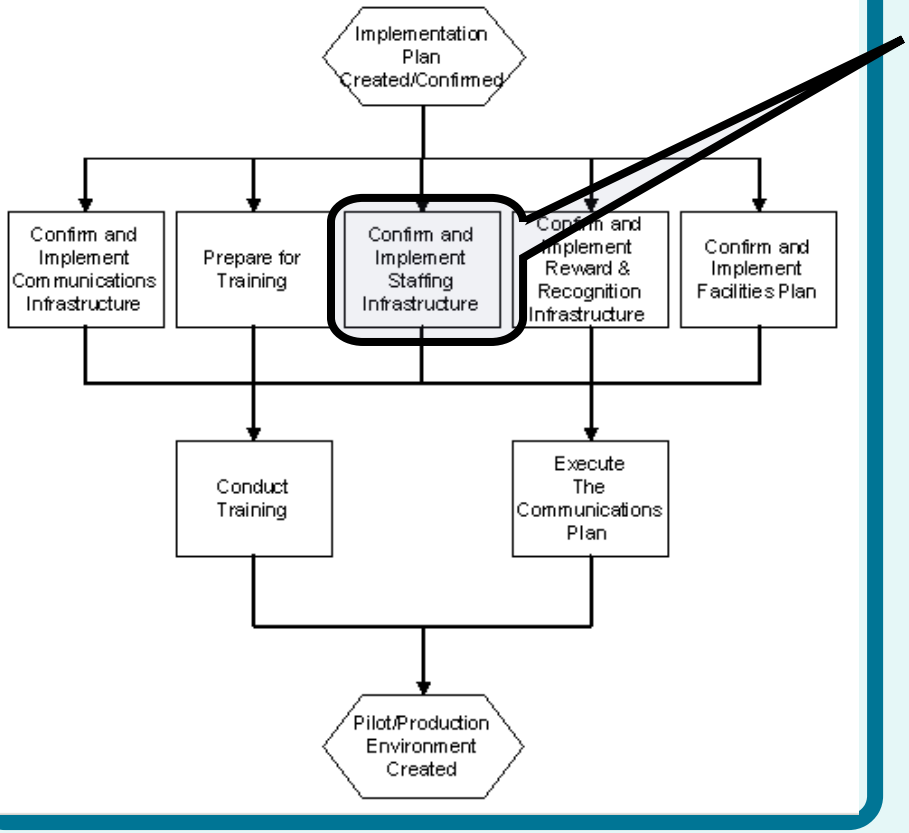
Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement Section, Training Approach) Educational Materials
Outputs	Training Logistics Attended To

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Lead	Executes this activity. Coordinates activities of the Facilities Specialist, Training Specialist, and Business Analyst to ensure that facilities and instructional materials are ready.
Facilities Specialist	Supports this activity. Identifies and acquires the required facilities.
Training Specialist	Supports this activity. Identifies and provides the required instructional materials.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Confirm and Implement Staffing Infrastructure



Review the Staffing section of the Work Force Enablement Strategy to understand the staffing approach.

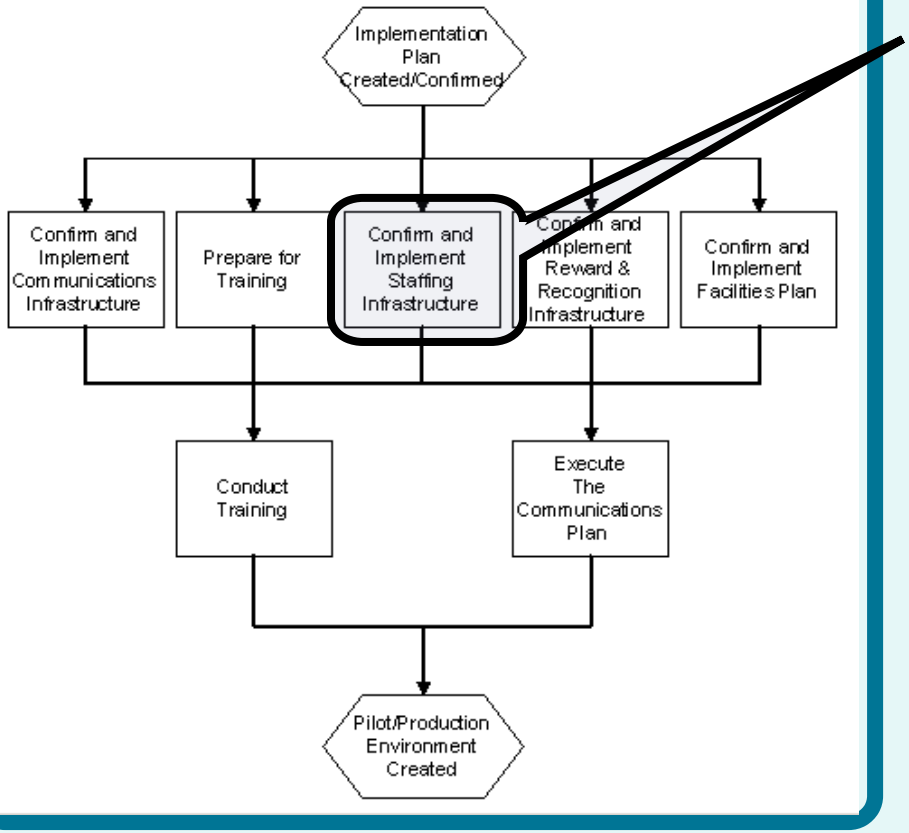
The target staff are those who are named in the Work Force Enablement Strategy and are part of the target site.

Execute the plan for staffing related-events and distribute preparatory materials.
Example: the Future Organization chart and/or Future Job descriptions needed to carry out the strategy.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Confirm and Implement Staffing Infrastructure



Consider the answers to the following questions before you acquire, reduce, or reassign staff:

- Is the staff requirement a long-term state or trend, or will it change in the near future?
- Are alternative staffing measures (outsourcing or temporary reassignment) appropriate?
- Who are the crucial staff members?
- What are the peripheral costs, such as those for unemployment insurance, career counseling, outplacement, public opinion, and goodwill?
- What are the implications of existing contracts, policies, and practices, such as special employee agreements or union contracts?

Educate and Prepare Target Stakeholders

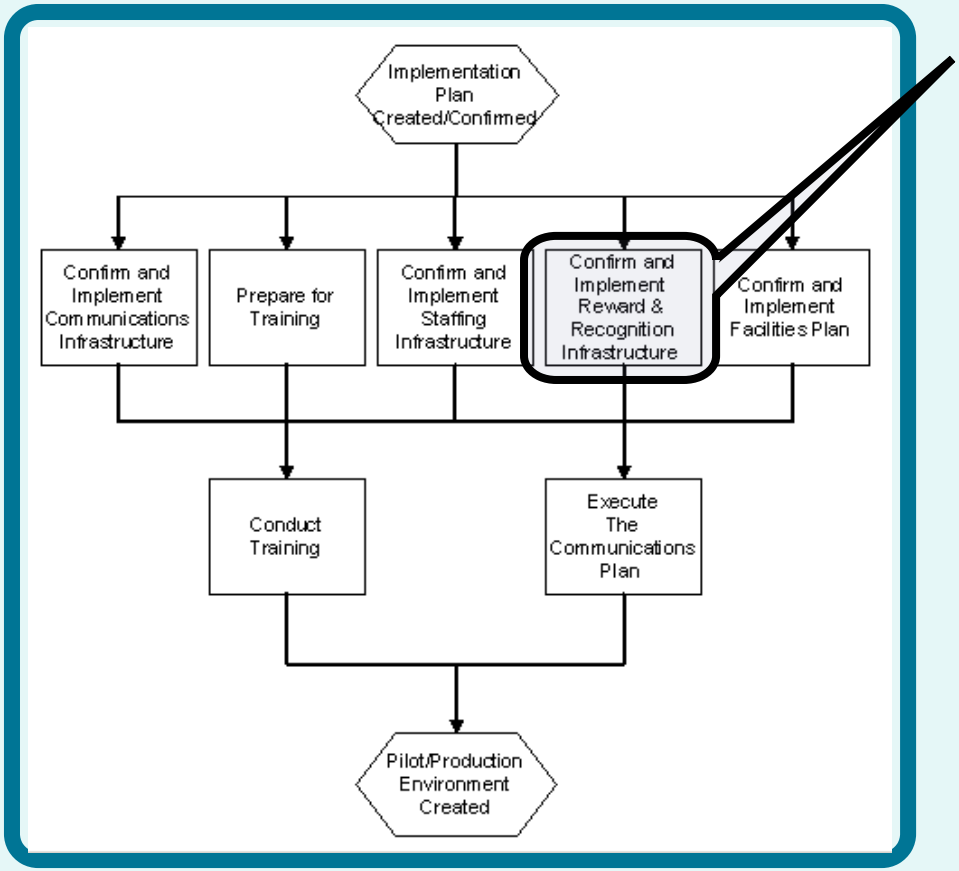
Confirm and Implement Staffing Infrastructure

Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement Section, Staffing Approach) Staffing Materials
Outputs	Staffing Logistics Attended To
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Reviews the Staffing section of the Work Force Enablement Strategy to understand the staffing approach. Executes plan for staffing related-events and distributes preparatory materials.
Staffing Specialists	Support this activity. Participate in staffing events and handle logistics.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Confirm and Implement Reward and Recognition Infrastructure



Review the Reward and Recognition section of the Work Force Enablement Strategy to understand the approach.

Execute the plan for compensation and recognition-related events and distribute preparatory materials needed to carry out the strategy.

These include materials for new or modified compensation formulas, special recognition events, and one-time rewards.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

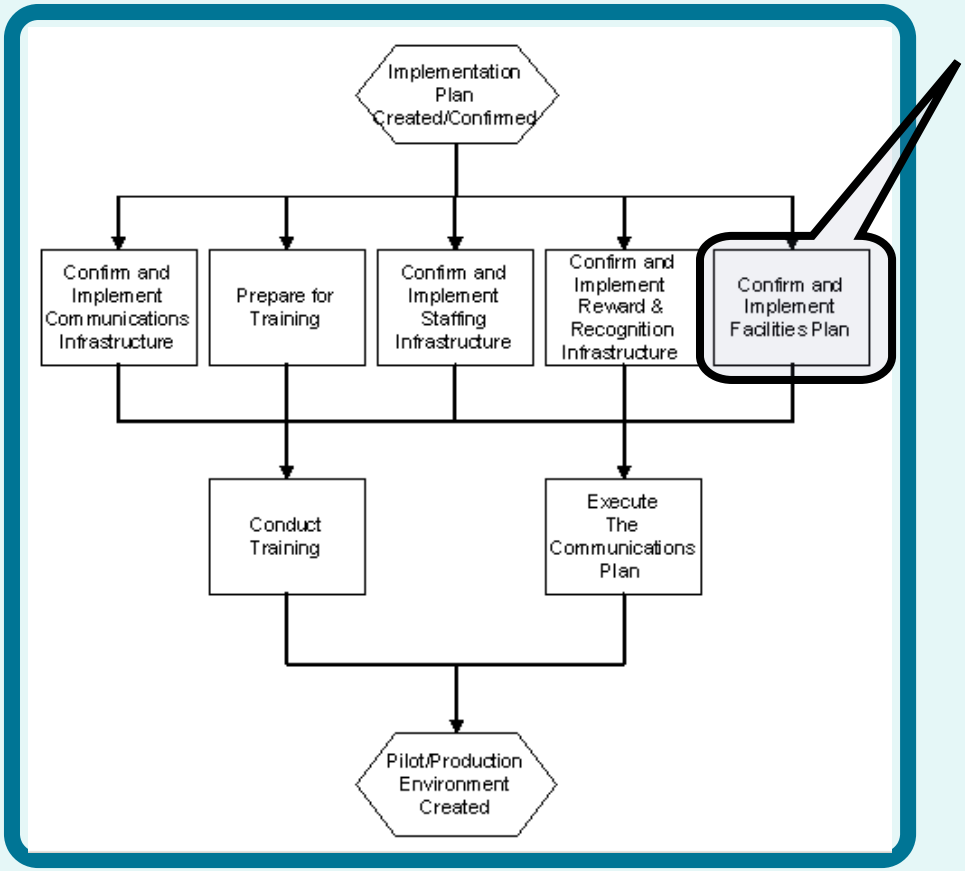
Confirm and Implement Reward and Recognition Infrastructure

Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement Section, Reward and Recognition Approach) Reward and Recognition Materials
Outputs	Reward and Recognition Logistics Attended To
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Reviews the Reward and Recognition section of the Work Force Enablement Strategy to understand the reward and recognition approach. Executes plan for reward and recognition related-events and distributes preparatory materials.
Compensation and Recognition Specialists	Support this activity. Participate in reward and recognition events and handle logistics.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Confirm and Implement Facilities



Review the Facilities section of the Work Force Enablement Strategy to understand the approach.

Distribute preparatory materials needed to carry out the strategy, questionnaires, building plans, work area plans, and space management materials.

Educate and Prepare Target Stakeholders

Confirm and Implement Facilities

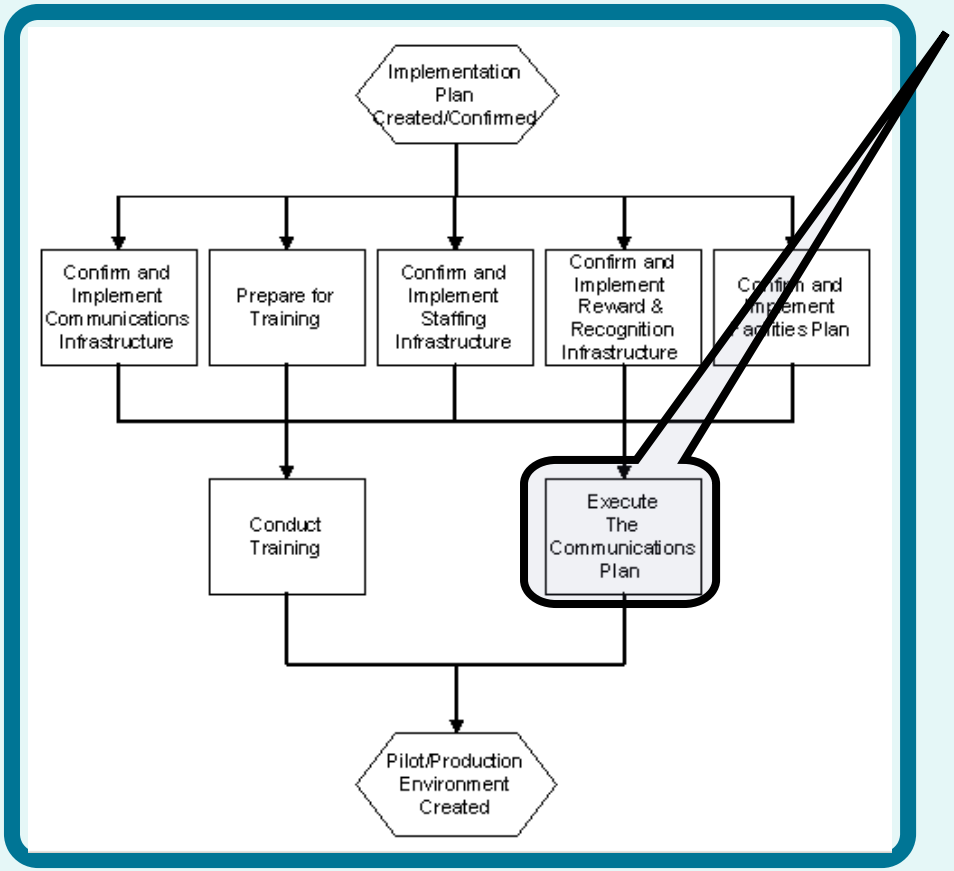
Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement Section, Facilities Approach) Facilities Materials
Outputs	Facilities Logistics Attended To

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Reviews the Facilities section of the Work Force Enablement Strategy to understand the approach. Distributes preparatory materials needed to carry out the strategy. Oversees execution of facilities related activities.
Facilities Specialist	Supports this activity. Handles all facilities related logistics.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Execute the Communications Plan



Implement the communications strategy, including procedures, roles, and responsibilities.

Distribute preparatory materials for carrying out the communications strategy and related follow-up materials; including, creating or modifying existing communication channels, such as newsletters, presentations, articles, and informal team overviews.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Execute the Communications Plan

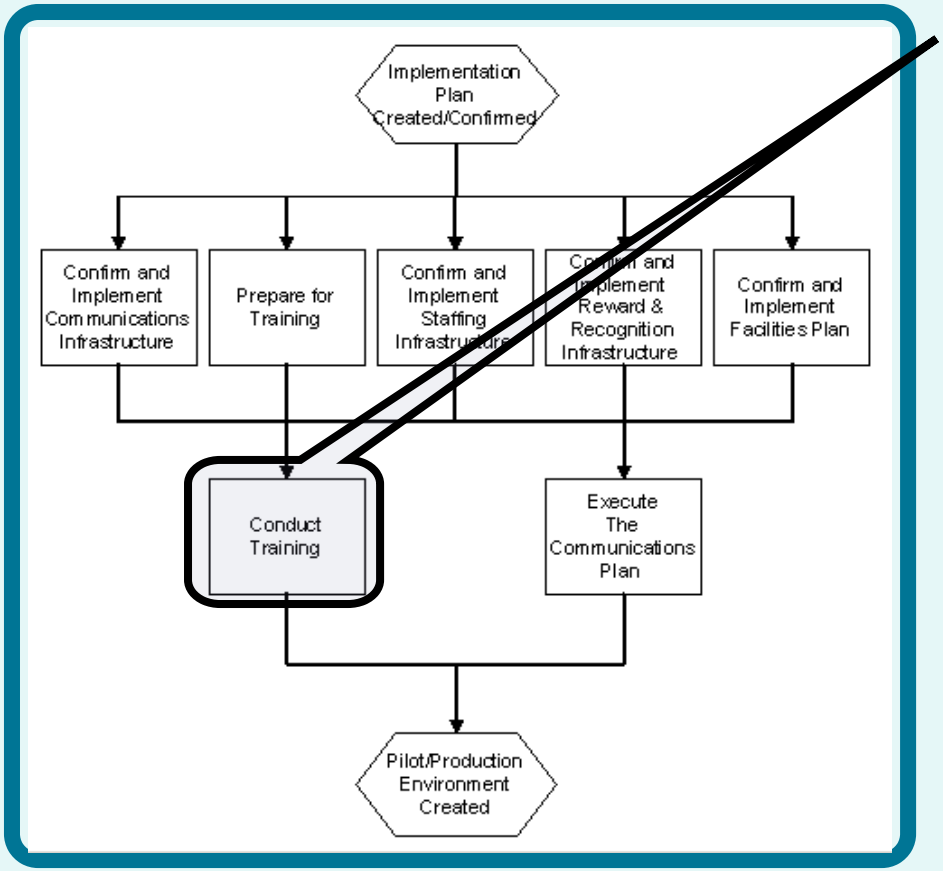
Inputs & Outputs	
Inputs	Requirements Attainment Strategy (Work Force Enablement Section, Communications Approach) Communications Materials
Outputs	Delivered Communications

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Implement the communications strategy, including procedures, roles, and responsibilities. Distribute preparatory materials for carrying out the communications strategy and related follow-up materials.
Communications Specialists	Support this activity. Handle logistics of communication events and developing ad hoc content.

Prepare for the Initial Release

Educate and Prepare Target Stakeholders

Conduct Training



Deliver courseware and other educational materials according to plan. Be sure to use well-prepared trainers; good trainers can bring a poorly designed course to life and make a well-designed course great. Skillful trainers bring the courseware to life through the ability to facilitate learning, not through their technical skills.

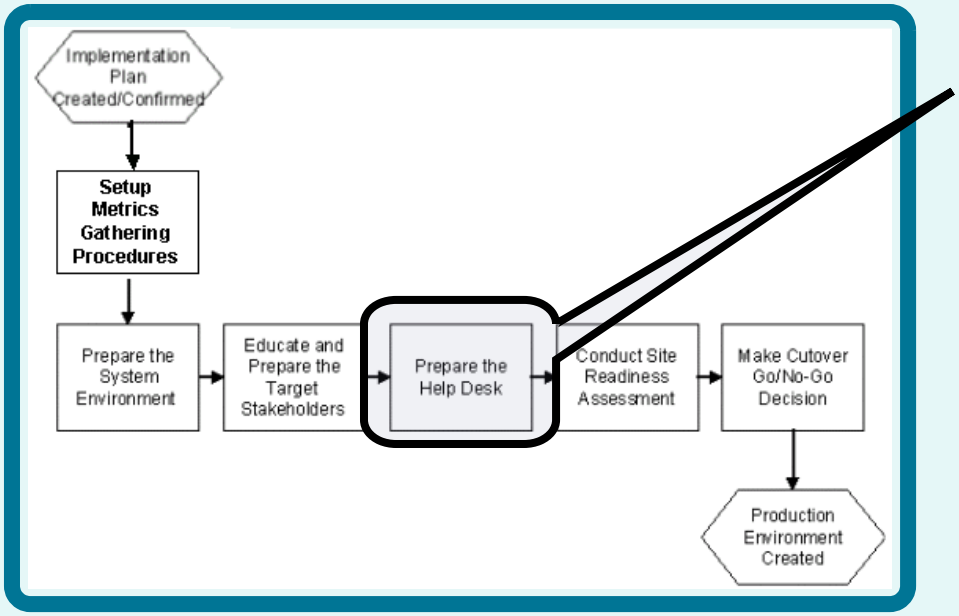
During training promote awareness of the operational efficiency to be gained by the new business process, organizational structure and technology. In addition, share customer satisfaction and other related metrics that have been taken of the processes and applications. This should all be done to help raise the end-user community's awareness and boost overall user adoption.

Educate and Prepare Target Stakeholders

Conduct Training

Inputs & Outputs	
Inputs	Educational Materials
Outputs	Educated Trainees
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Lead	Executes this activity. Ensures that the appropriate training is delivered as planned.
Training Specialists	Support this activity. Deliver the required training and administer logistics.

Prepare the Help Desk



Ideally, even if the initial roll-out site is a pilot, you should staff the help desk with people who will ultimately support the system after it has been fully deployed.

This is an excellent opportunity for knowledge transfer to take place between the project members and those who will support the system in the long run.

It is recommended that, when a problem is resolved, support technicians be prompted/requested to add their resolution to the knowledgebase, which then gets sent for approval before it is actually submitted. This way, technicians are urged to describe complete fixes in their resolution, and help desk management has the final say on which items will be most useful in the future.

The next time a user calls with a problem similar to a previously described problem, the technician will have this resolution at their fingertips and may be able to resolve the issue immediately.

Prepare the Help Desk

The following areas must be addressed for a help desk to be set-up:

- Policies and Procedures must be implemented.
- Staffing of the Help Desk and designated hours of operations must be determined.
- Logistics and facility/space requirements should be resolved and in place.
- Training on applicable software should be finalized.
- Communication between the Help Desk and end-users should be initiated and ongoing.

Below are some questions to consider when reviewing the performance of the help desk:

- Are incoming requests routed to the appropriate personnel right away, or is time being wasted as requests get bounced from person to person?
- Do you have an effective system in place for your lower level technicians to leverage the knowledge of your higher-level experts?
- Are you encouraging end-users to help themselves with user friendly and efficient methods?
- Who is involved in trouble resolution? What are their roles/tasks?
- What are the subjects of typical problems (e.g., PC hardware, keyboard, hardware error, etc.)?
- What resolution types do you use currently, or would you use?
- What kinds of information would you want available (and reportable) on look-up tables? For example, resolutions, call types, error codes...? What alerts do you want active? Do you need a crisis response group and procedure?
- What metrics do you want to use to measure quality of service? Number of calls handled? Mean-time resolution? Number of calls unresolved after 24 hours? Longest lifespan? Calls closed on First Contact?

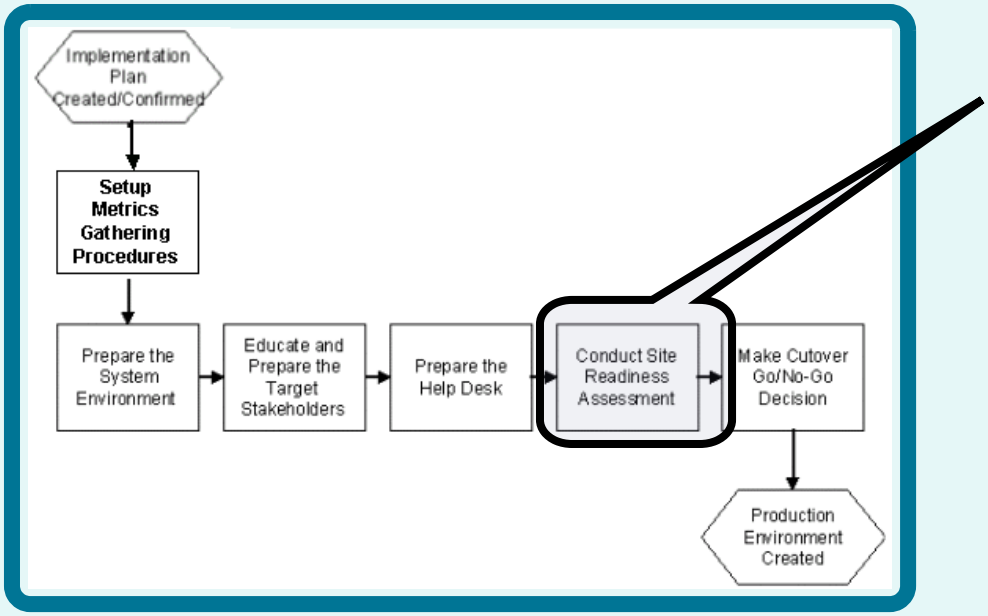
Prepare the Help Desk

Inputs & Outputs	
Inputs	System Documentation (final) Standard Operating Procedures
Outputs	Initiated Help Desk

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Lead	Executes this activity. Plans for and oversees the development of the project related help desk.
Facilities Specialist	Supports this activity. Provides work areas, computers, and communications equipment for the Help Desk.
Business Analyst	Supports this activity. Provides business knowledge to Help Desk staff.
Training Specialist	Supports this activity. Trains and coaches Help Desk staff as needed to support the initial implementation (or pilot).

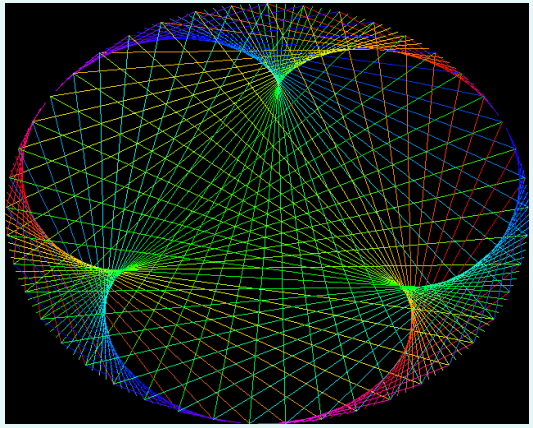
Prepare for the Initial Release

Conduct Site Readiness Assessment



Verify that the application, data, and technology infrastructure are working together at the initial implementation (or pilot) site.

Verify that all other parts of the solution (process, organization, data) are in place at the initial implementation (or pilot) site.



Conduct Site Readiness Assessment

Verify that the application, data, and technology infrastructure are working together at the initial implementation (or pilot) site.

- Application Recovery Test
- Application Regression Test (For selected functions)
- Technical Recovery Test
- Technical Performance Test

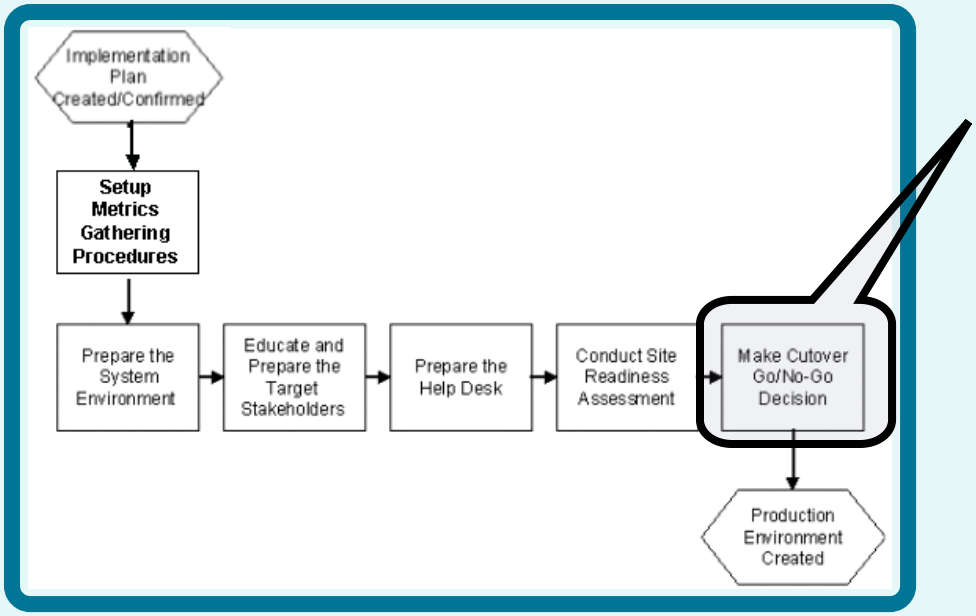
Verify that all other parts of the solution (process, organization, data) are in place at the initial implementation (or pilot) site.

- Confirm policies and procedures are well documented, perform user impact planning, and assure manual processes, workarounds and policies on new job procedures are defined and documented.
- Ensure that training on above policies and procedures and other needed training has been scheduled and has occurred prior to project implementation. Ensure training materials are updated, coordinate post-training evaluation and training follow-up activities.
- Ensure that changes to productivity and/or staffing have been assessed, that movement of responsibilities from one area to another happens seamlessly, and assess if there are any newly identified change management or HR needs.

Conduct Site Readiness Assessment

Inputs & Outputs	
Inputs	Work Force Enablement section of the Requirements Attainment Strategy System Implementation section of the Requirements Attainment Strategy
Outputs	Test Results (for the system elements of the solution) Target Site Readiness Status Report
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Verify that all parts of the solution are in place and ready for implementing at the initial (or pilot) site.
Testers	Support this activity. Verify that the system is ready for use.

Make Cutover Go/No-Go Decision



Review readiness testing results with target-site management and specialty team leads to decide whether the release is ready for cutover to production.

If not, identify the reasons for your decision in a Change Request/Problem Report and return the unacceptable solution elements to the appropriate development team if the problems can be resolved without a change to a baselined product.

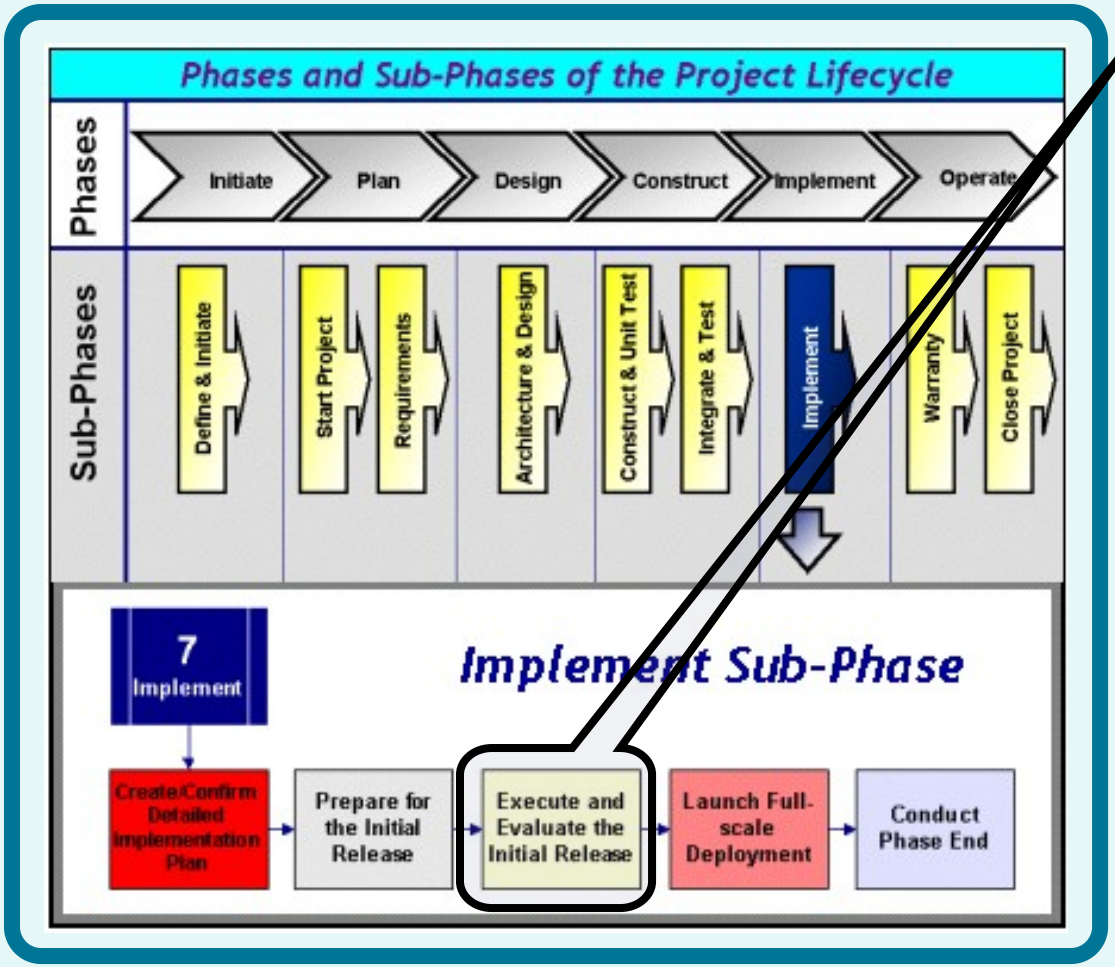
If the problems require a change to a baselined product, or if the problems involving capability or performance are critical, their resolution may require revising the design of or may necessitate changes to related business processes and organizational roles and responsibilities. Even minor problems that require time to resolve should be tracked the same as large problems.

Note: The purpose of this activity is to promote progress, not to obstruct it. Prevent a system from proceeding to production only as a result of major problems in design or quality.

Make Cutover Go/No-Go Decision

Inputs & Outputs	
Inputs	Test Results (for the system elements of the solution) Target Site Readiness Status Report
Outputs	Initial Implementation Cut-Over Decision
Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Reviews results with initial implementation (or pilot) site management and project team leads to decide whether release is ready for use. Identifies reasons for decision in a Change Request/Problem Report and returns appropriate work packages to Development Team or Project Team.
All Other Project Team Leads	Support this activity. Provide input from their respective areas to assist in determining whether the system is ready to use. Resolves problems that do not require changes to base lined products.
Project Team Specialists	Support this activity. Resolve problems that require changes to baselined products or have critical capability or performance impacts.

Details - Execute and Evaluate the Initial Release



The initial release to production (pilot or not) produces information that will help strengthen and streamline the full-scale deployment process. During this period, the solution (people, process, and system) should operate in a live environment. If a pilot is being conducted, it should operate as close to a live scenario as possible, and as many different situations and transactions as possible should be exercised for and by the system and staff.

As a result of the initial release, lessons are captured and used to modify solution elements, strategies, and plans. In each specialty area --- process, organization, application, data, and technology --- the initial implementation provides a chance to experience the unexpected and modify solution elements accordingly.

Details - Execute and Evaluate the Initial Release

During execution, observe the operation of the business process and compare it to stated objectives in areas such as:

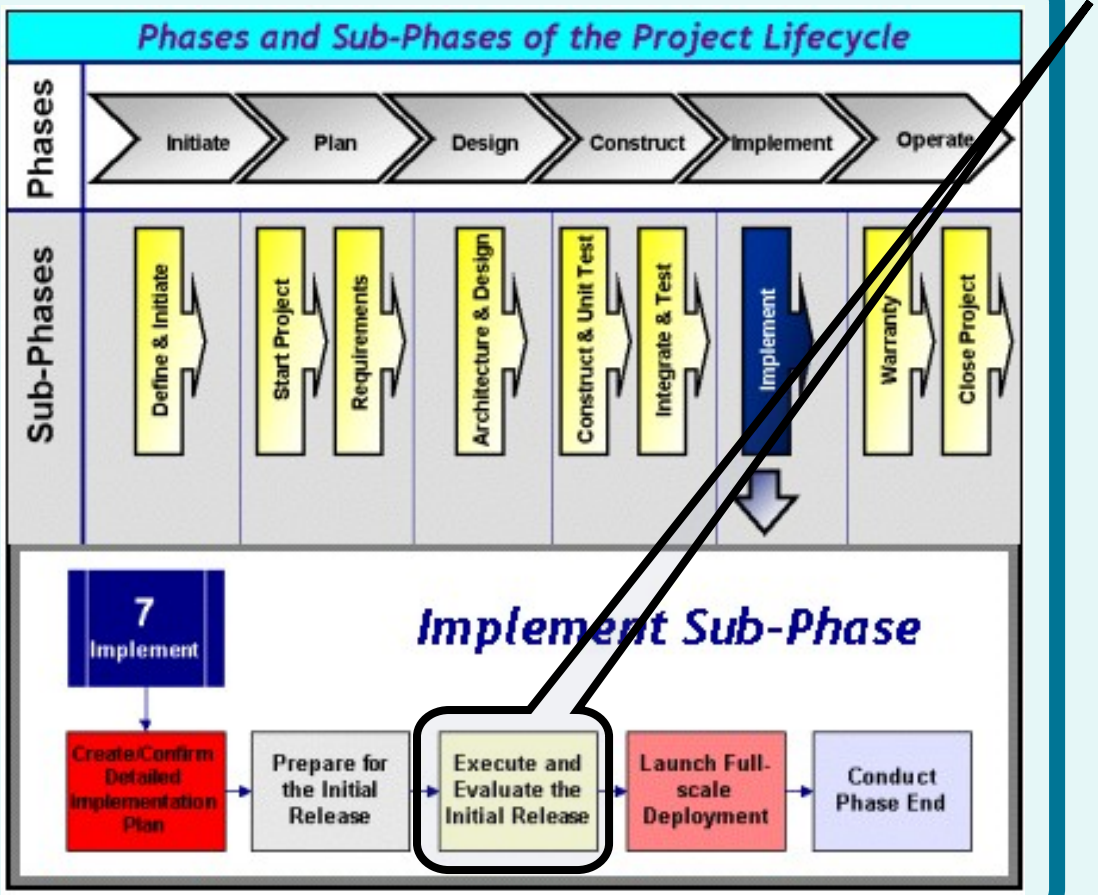
- Quality of process outputs
- Time to complete process tasks
- Response of client's customers
- Effectiveness of organization support systems
- Effectiveness of reward and recognition systems
- Organization morale, regulatory bodies, or labor unions

Work with the Implementation Team and management to:

- Identify problems as soon as possible
- Record problems
- Submit Change Requests/Problem Reports to the release board if resolution affects base-lined products, particularly if it affects the architecture or design
- Resolve outstanding problems or schedule them for resolution in subsequent releases.

Tune the business processes, using either a system-based or process-based approach. For example, modify application tables to add a missing order type or create a manual workaround to compensate for sourcing plan that is not yet online. Identify those problems that cannot be resolved with the timeframe of this sub-phase.

Details - Execute and Evaluate the Initial Release

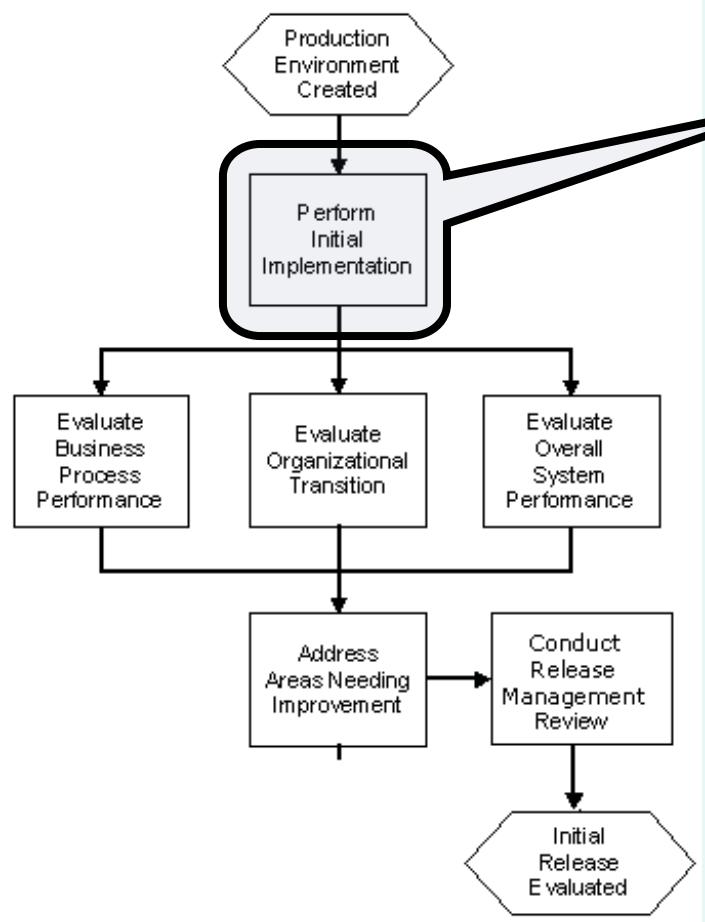


This process is broken out into 6 sub-processes:

- Perform Initial Implementation
- Evaluate Business Process Performance
- Evaluate Organizational Transition
- Evaluate Overall System Performance
- Address Areas Needing Improvement
- Conduct Release Management Review

Execute and Evaluate the Initial Release

Perform Initial Implementation



Implement the initial release of the solution, including metrics gathering activities. Do the following:

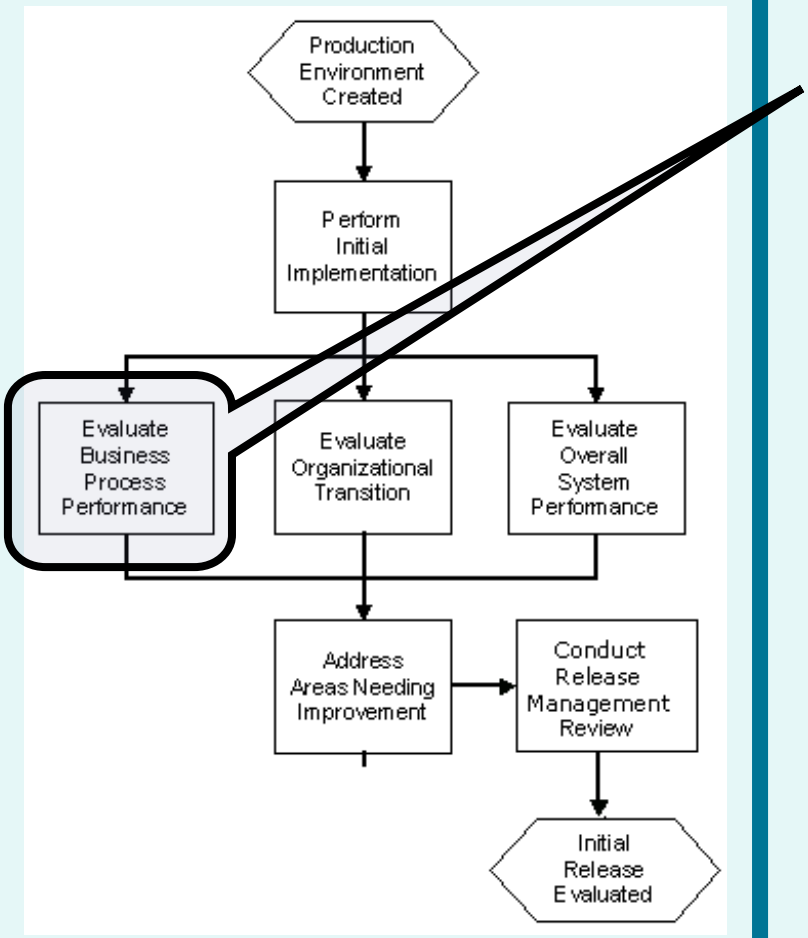
- Gather predefined metrics for review and analysis.
- Examine management reports, investigating and resolving issues according to level of severity and importance.
- Document findings in an implementation log.

Perform Initial Implementation

Inputs & Outputs	
Inputs	Installed Project Solution Live Data
Outputs	Production Metrics Implementation Log

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Ensures that metrics gathering procedures are followed. Generally keeps an eye open for significant problem areas that could endanger success of the project, if allowed to continue.
Implementation Team Specialists	Support this activity. These are the team leaders and their staff from the project organization specialty teams, e.g. Technical and Infrastructure Design. They are available to address significant problems related to the initial implementation of the project solution that falling into their areas of responsibility.

Evaluate Business Process Performance



Evaluate data that reflect business process performance as defined in the Requirements Specification.

Perform root cause analysis to differentiate between symptoms and the true reason(s) for falling short of expectations.

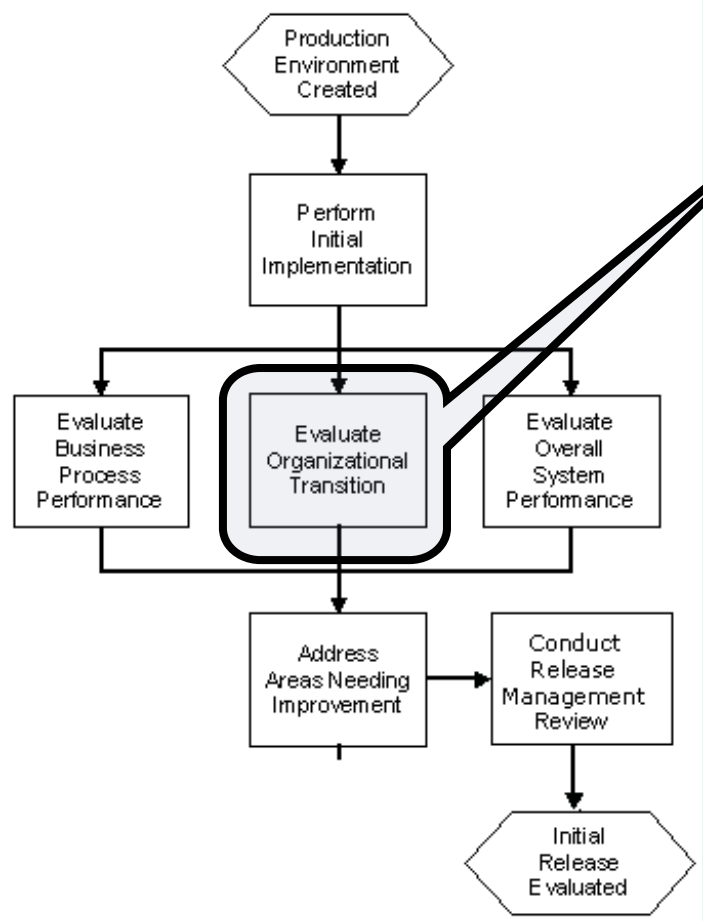
Document results in the implementation log.

Evaluate Business Process Performance

Inputs & Outputs	
Inputs	Business Process section of the Requirements Specification Business Process section of the Solution Architecture Baseline Metrics Live Data
Outputs	Production Metrics Implementation Log

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Examines business process metrics, looking for those that do not meet expectations. Must use a representative sampling on which to base evaluation.
Business Analyst	Supports this activity. Provides input regarding the overall business process and related applications.

Evaluate Organizational Transition



Assess the following metrics to determine how well the organization is transitioning to future state:

- Whether enablement activities are to plan and on schedule.
- Whether enablement activities are reaching the appropriate stakeholders.
- Whether targeted stakeholders have bought into the solution, activity, or situation.
- Whether roles and responsibilities are being performed effectively.

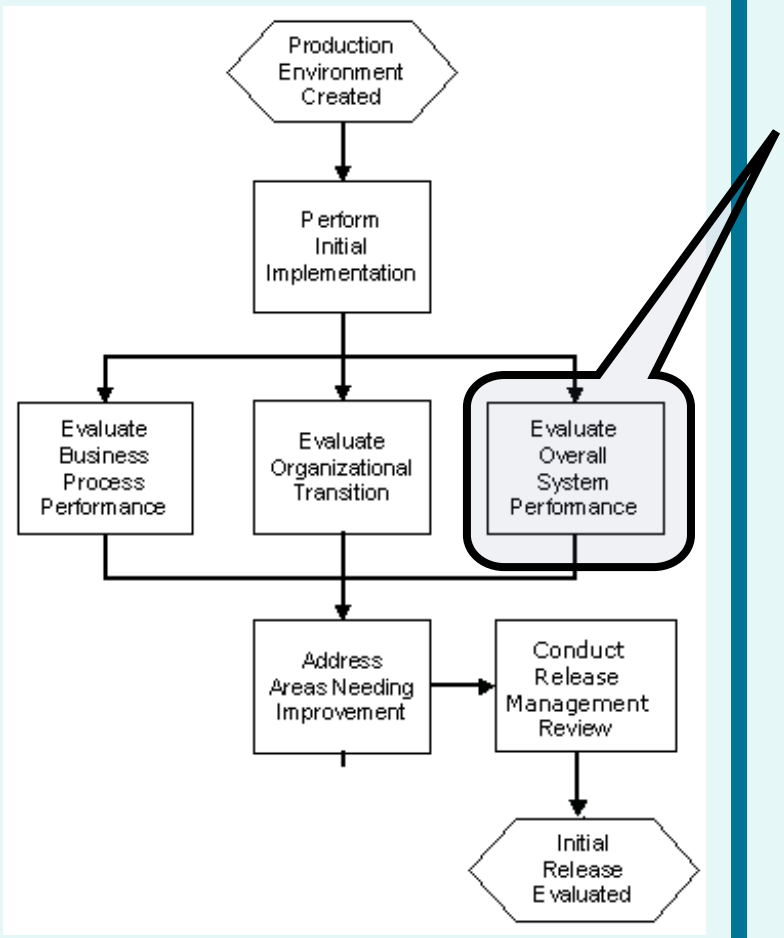
Execute and Evaluate the Initial Release

Evaluate Organizational Transition

Inputs & Outputs	
Inputs	Organization section of the Requirements Specification Organization section of the Solution Architecture Baseline Metrics Live Data
Outputs	Production Metrics Implementation Log

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Examines organizational metrics looking for those that do not meet expectations. These include all work force enablement metrics impacting stakeholders' ability to perform their appropriate roles and responsibilities. Must use a representative sampling on which to base evaluation.
Training Specialist	Supports this activity. Provides input regarding training performance.
Facilities Specialist	Supports this activity. Provides input regarding facilities performance.
Communication Specialist	Supports this activity. Provides input regarding communications performance.
Compensation and Recognition Specialist	Supports this activity. Provides input regarding compensation and recognition performance.
Organization Design Specialist	Supports this activity. Provides input regarding the organizational reporting structure, roles, and responsibilities.

Evaluate Overall System Performance



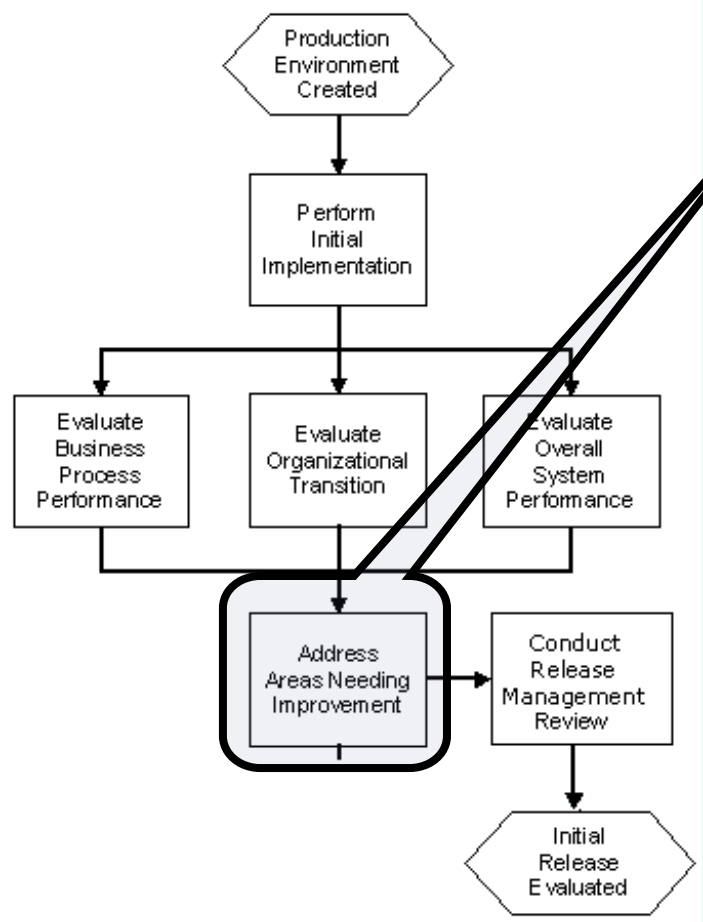
Review overall systems performance with an eye to the following.

Focus particularly on application, data, and technology infrastructure requirements documented in the Requirements Specification.

Evaluate Overall System Performance

- Hardware
- Servers
  - Do they have sufficient memory for the growth we expect to have in the near future?
  - Is there sufficient processing power for all of the expected transactions?
- Databases
  - Does the database have the capacity to handle the number of transactions the system will need to contend with?
  - When will we reach the maximum capacity of the database based on the projected number of transactions?
- PCs
  - Do they meet application requirements?
  - What is their ability to support future upgrades?
- Network
  - Is the network configuration appropriate?
  - Are the response times acceptable?
  - Is the network capable of handling the growth that is projected?
- Software
  - Do we have the appropriate number of licenses?
  - Does the delivered functionality meet end-user expectations?

Address Areas Needing Improvement



Develop an action plan to address solution elements that did not meet or exceed expectations as defined in the Requirements Specification. Determine relative weight and priority of areas requiring attention.

Modify the Project Workplan to include activities for addressing related issues. Request modification to solution elements according to predefined change control and configuration management procedures.

If there is a need to modify the deployment approach at a high-level, update the Project Charter accordingly.

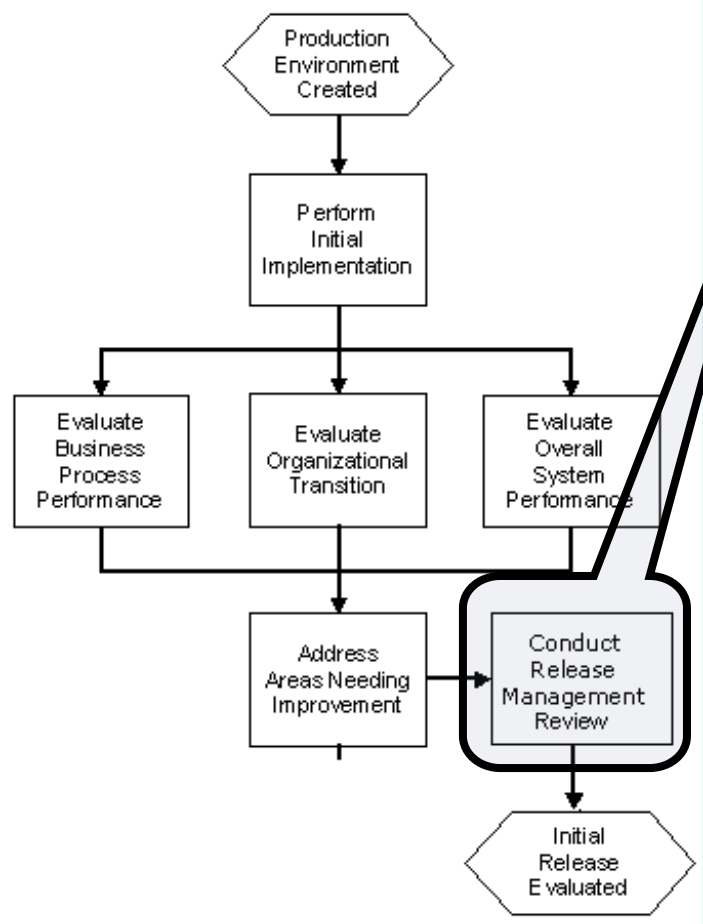
If there is a need to modify the Work Force Enablement or System Implementation Strategies, update the Requirements Attainment Strategy.

Address Areas Needing Improvement

Inputs & Outputs		
Inputs	Requirements Specification Solution Architecture Production Metrics	Design Specification Baseline Metrics Implementation Log
Outputs	Change Requests Project Charter (Approach section updated) Requirements Attainment Strategy (Work Force Enablement and System Implementation Strategies updated)	

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Execute this activity. Assess implementation results, and determine action plan for addressing areas of concern.
Project Manager	Supports this activity. Facilitates activities of the specialty Team Leaders in developing the plan.
Implementation Team Specialists	Support this activity. These are the team leaders and their staff from the project organization specialty teams, e.g. Technical and Infrastructure Design. They are available to address significant problems related to the initial implementation of the project solution that falling into their areas of responsibility.

Conduct Release Management Review



Once you have observed the initial implementation (or pilot) and resolved critical issues, meet with the Release Management Team to obtain approval for full-scale deployment. Do the following:

- **Review Initial Implementation Results**. Review the results of the initial implementation (or pilot), and reach agreement that performance objectives and related requirements have been met.
- **Review Acceptance Criteria**. Review the Acceptance Criteria, set forth by the Release Management Team, and reach agreement that they have been met.
- **Review Change/Problem Report and Log**. Review the Change/Problem Report and Log and verify that all problems have been corrected or deferred to a later release.

At conclusion of this session, the release management team will either agree or disagree that the solution is ready for full-scale deployment.

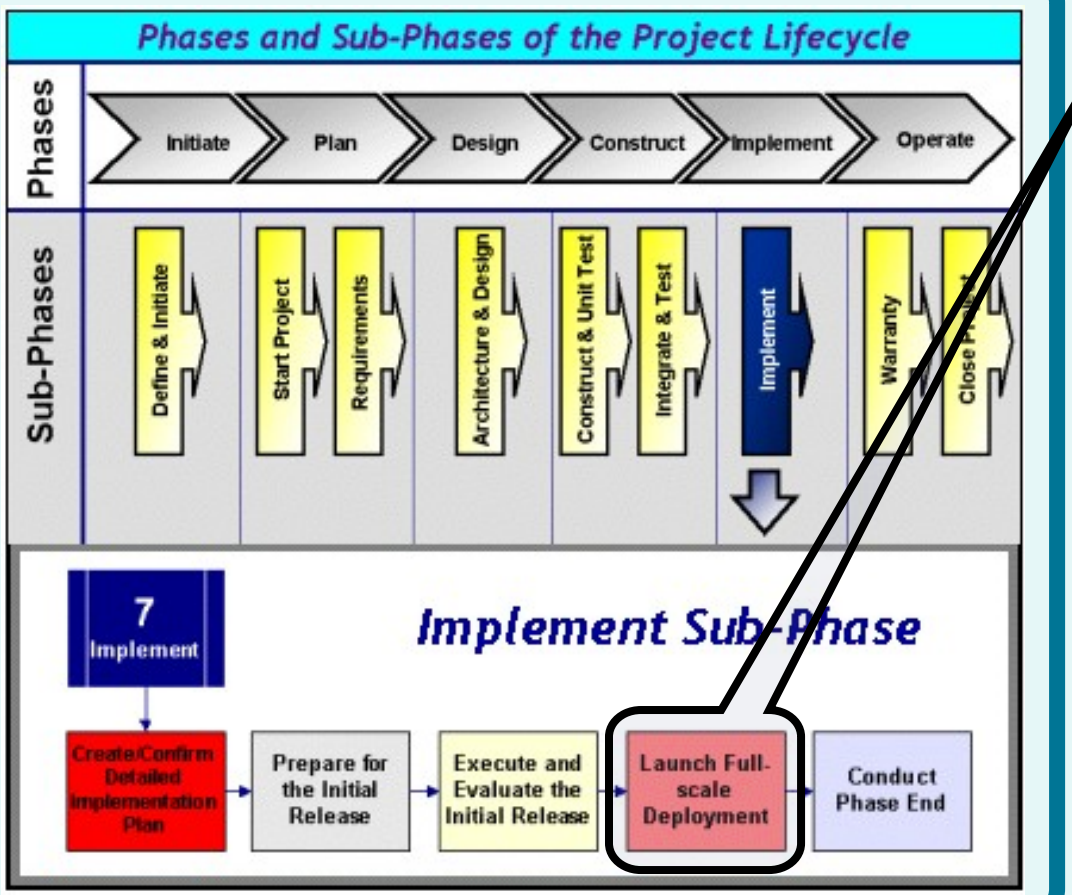
Should the decision be ‘No-Go’, the reasons supporting the decision should be documented. The team may need to revisit the design of the overall architecture and repeat impacted sub-phases. Depending on the changes and their level of impact, the initial implementation (or pilot) may need to be re-executed before moving to deployment.

Address Areas Needing Improvement

Inputs & Outputs	
Inputs	Requirements Specification Design Specification Solution Architecture Baseline Metrics Production Metrics Implementation Log
Outputs	Cut-over Decision

Roles & Responsibilities	
Role	**Responsibility**
Release Management Team	Executes this activity. Reviews initial implementation (or pilot) results, Acceptance Criteria, and Problem Log to determine whether the application is ready for release. Executes this activity, renders decision and reasons for decision.
Project Manager	Supports this activity by providing the initial implementation (or pilot) results. Supports this activity by receiving the decision and the reasons for the decision.

Details - Launch Full-scale Deployment

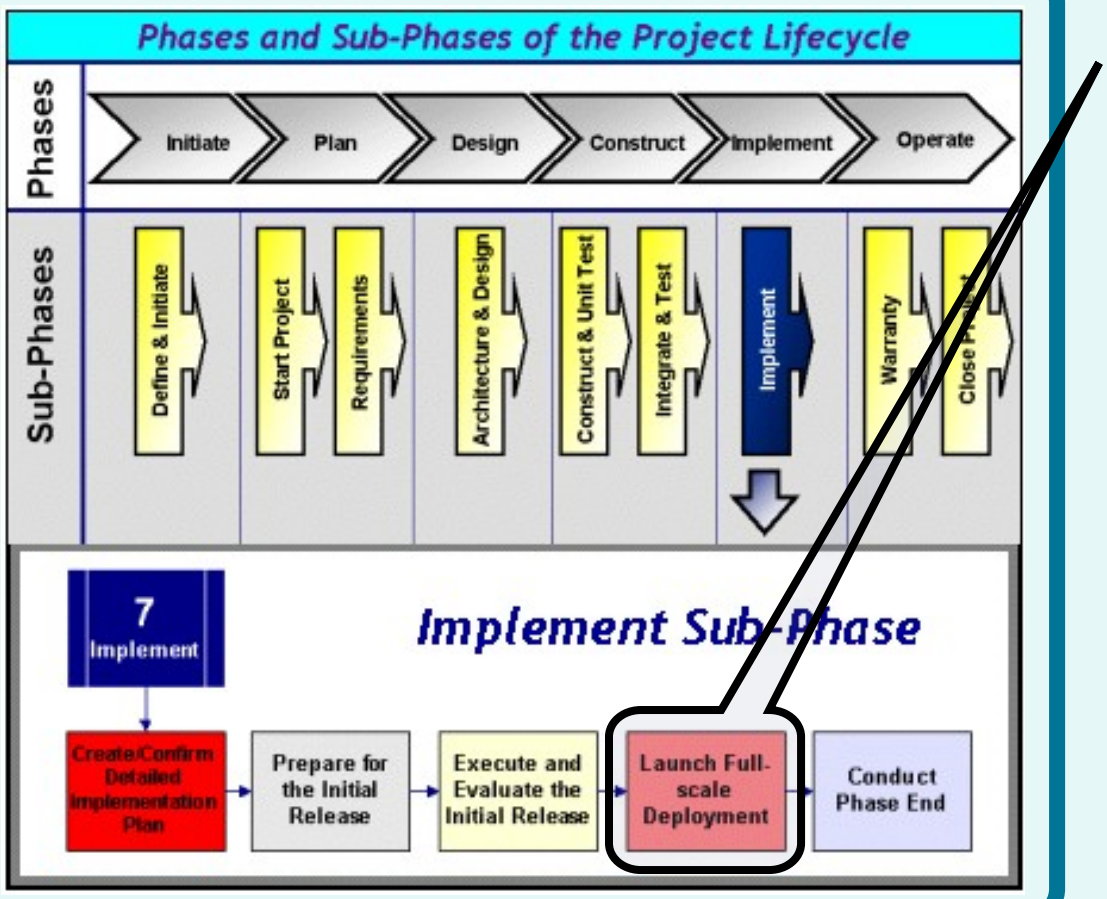


At this point, the initial implementation (or pilot) is considered a success, the release management team has assessed the situation, and they have decided to move forward with full deployment of the solution.

Paying close attention to lessons learned during the initial (or pilot) implementation, and using what was already developed as part of the detailed Implementation section of the Project Workplan, flush out the details of deployment for a *generic* target site. Include activities, dependencies, and scheduling.

Be sure to remove site-specific activities, dependences, resource names, and scheduling that you may have picked up unintentionally from the initial (or pilot) implementation.

Details - Launch Full-scale Deployment



Once the generic plan is completed, review it with management and operations teams *from each deployment site* in order to identify any site-specific variants.

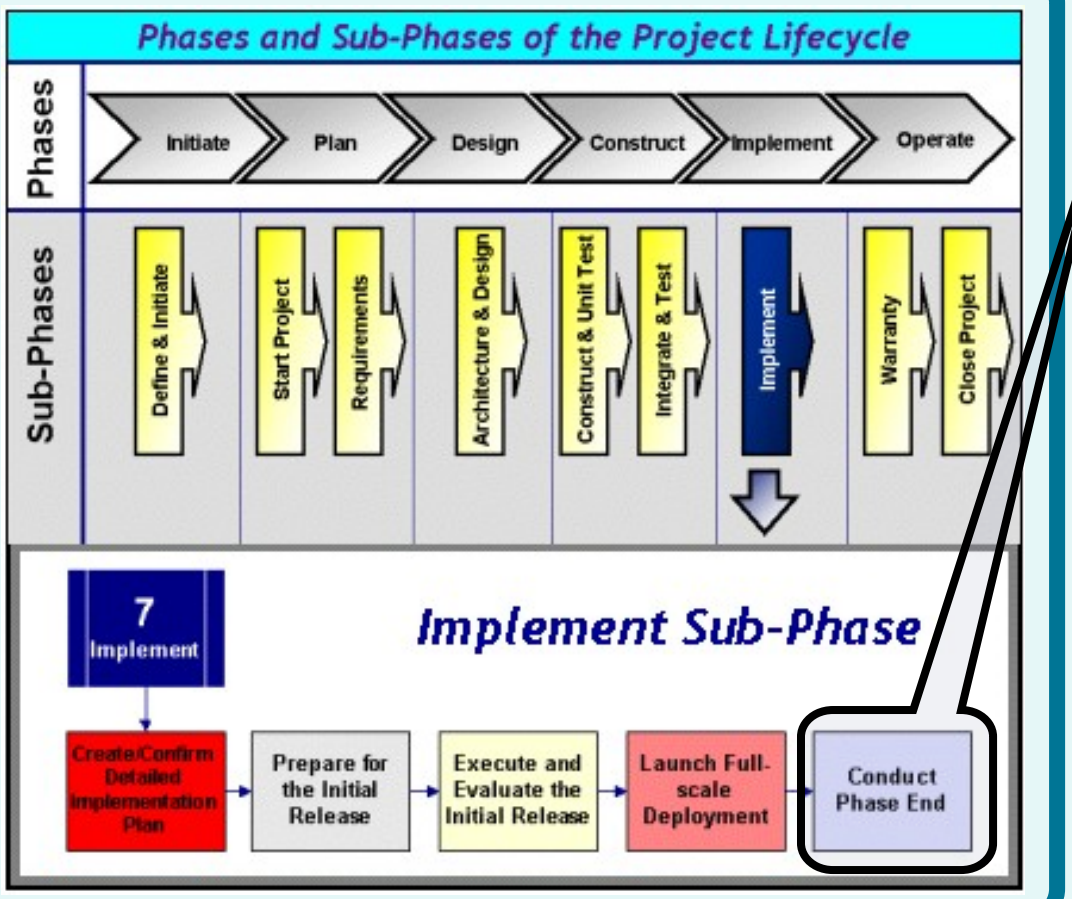
Repeat all activities from handbook processes 2.0 Prepare for the Initial Release and 3.0 Execute and Evaluate the Initial Release, adapting any activities to the needs of each deployment site.

Launch Full-scale Deployment

Inputs & Outputs	
Inputs	Project Workplan (Implement section) Lessons Learned from Initial (or Pilot) Implementation Requirements Attainment Strategy (System Implementation and Work Force Enablement sections)
Outputs	Project Workplan (Implement section updated) Deployed Project Solution Release

Roles & Responsibilities	
Role	**Responsibility**
Implementation Team Leader	Executes this activity. Works with management and operations personnel from targeted deployment sites to customize the deployment plan for each. Oversees execution of deployment activities for each site.
All Project Team Leads	Support this activity with focus to their area of responsibility and expertise.
Project Manager	Supports this activity by ensuring that all areas impacted are addressed, coordinates reviews, site plans, etc.
Deployment Site Management	Supports this activity by providing site specific information that should be considered in the deployment and by participating in the various activities and informing the project team of any issues.

Details - Conduct Phase End



The standard project phases, as defined in the project lifecycle, incorporate phase end gates or "decision points" to allow for a senior management review.

Just as a Business Case (with Cost Benefit Analysis) is presented to senior management for funding in the Define & Initiate Sub-Phase, additional validations of the project are performed at the subsequent phase end gates (e.g. Plan, Design, Construct).

Details - Conduct Phase End

Inputs & Outputs	
Inputs	All Phase deliverables Business Case Project Charter Project Workplan
Outputs	Updated Business Case Updated Project Workplan “Go” or “No Go” project decision
Roles & Responsibilities	
Role	**Responsibility**
Project Manager	Update Business Case, Project Charter and workplan. Prepare documentation and a presentation of project status, and present at Phase End Review.
Project Sponsor	Provide guidance to the Project Manager in preparation for Phase End Review.
Steering Committee	Participant in Phase End Review, provide direction when necessary, and provide a “go” or “no go” decision for project to enter the next phase.

Implement Summary

Purpose

- **The purpose of the Implement Sub-Phase is to deploy the integrated project solution or solution release that was created to meet a specific set of business requirements and objectives.**

Team Roles

- **Steering Committee, Project Sponsor, Project Manager, Support Areas, Project Office, Process and Application Team, Testing Team, Technical and Infrastructure Team, Data Design and Integration Team, Organization Design and Enablement Team, Training and Documentation Team, Implementation Team.**

Major Inputs

- **Fully Integrated Solution**
- **Project Charter**
- **Project Workplan**
- **Requirements Attainment Strategy**

Major Outputs

- **Project Charter (updated)**
- **Project Workplan (updated)**
- **Production Metrics**
- **Requirements Attainment Strategy (updated)**
- **Solution Release**
- **Cut-Over Decision**

Processes

- **Create/Confirm Detailed Implementation Plan**
- **Prepare for the Initial Release**
- **Execute and Evaluate the Initial Release**
- **Launch Full-scale Deployment**
- **Conduct Phase End**

Implement Sub-Phase

Thank You