

itSMF-SAB October 16th 2008

Objects in your mirror are
closer than they appear



AGENDA

1

Introductions

2

Today's Topic

- The value of looking back through requirements tracing
- Gathering and Aligning to Requirements
- Mapping project activities and IT services to Requirements
- OASIS Connected Frameworks

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Audience Participation

- I have some ideas but don't claim to have all the answers
- I want to engage the audience
- I want to share YOUR stories
- **Mostly, I want someone to bail me out if I get stuck with a heckler**

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Q+A



Looking Back
Objects In Mirror Are Closer Than They Appear





The Value of Looking Back

A project is complete when you stop working for it and it starts working for you

A poor example of looking back
(Bannister and Landy – 08/1954)



A great example of looking back
(Apollo 11 photo of Earth and Moon – 07/1969)



Questions:

- If moving forward is so important then why does your car have one windshield and three mirrors?
- Even your dashboard is a recorded history of things that have already happened
- How would you feel if you drove your car without any mirrors or gauges? Why?
- You wouldn't drive your car that way, why would you manage your IT Projects and Services that way?

Looking back:

- Those who do not learn from history are doomed to repeat it (George Santayana)
- Luck is when preparation meets opportunity (Seneca – Roman dramatist, philosopher, politician)
- Never have Children, they'll break your heart (My Mother)



Requirements Traceability

Mapping IT activities to Business Demand

Question:

Answer:

What serves as IT's rear view mirror?

- Service and Project metrics -How are we doing?
- Requirements tracing -Why are we doing it?

What is traceability:

- Traceability is a means of mapping business needs to activities, deliverables and ongoing services
- Serves as a set of 'bread crumbs' to continually validate and verify project work
- Provides a means of measuring success
- Means of learning and applying change to processes for continual improvement
- Other measures exist, but they are more related to 'How' than 'Why'

The need for traceability:

- Aligning Requirements to Project Activities (Architecture, Development, Testing, etc)
- Aligning Project Activities to Project Deliverables
- Aligning Project Deliverables to Changes in IT Services
- Ultimately mapping new requirements to changes in services (through to Service Catalogue and CMDB)
- My favourite quote: "What are YOU doing today that will sell US more burgers?" (Dave Thomas of Wendy's)

Governance:

- BA: Business Analysis is NOT just the responsibility of the business
- QA: Quality Management is NOT just the responsibility of the project testing team
- SM: Service Management is NOT just responsibility of Operations
- PM: Project Manager must bring all of these fields together

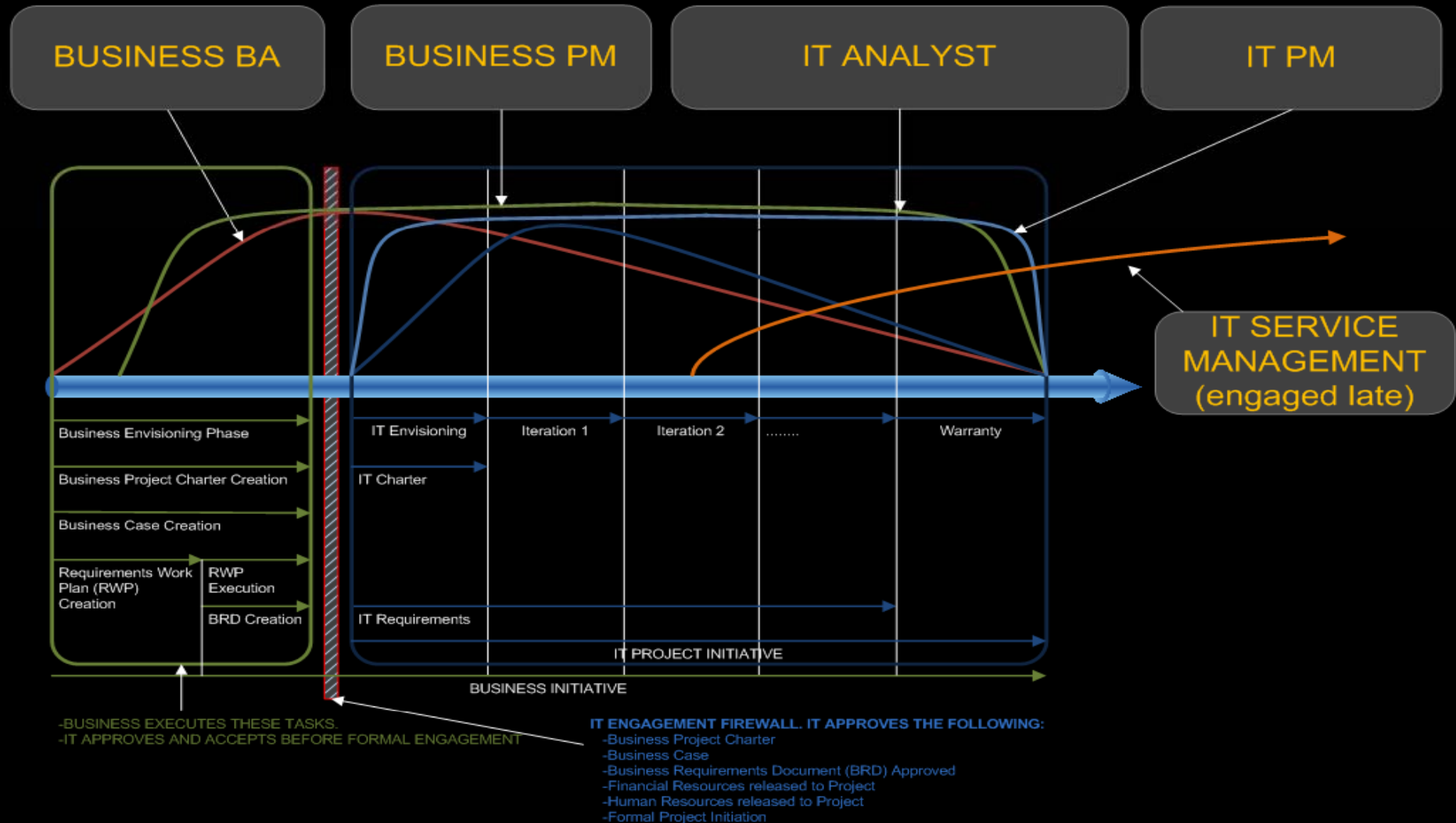
#1 Rule of Human Behaviour

When we know WHY we're doing WHAT we're doing, we'll do it BETTER



IT Project Engagement Process

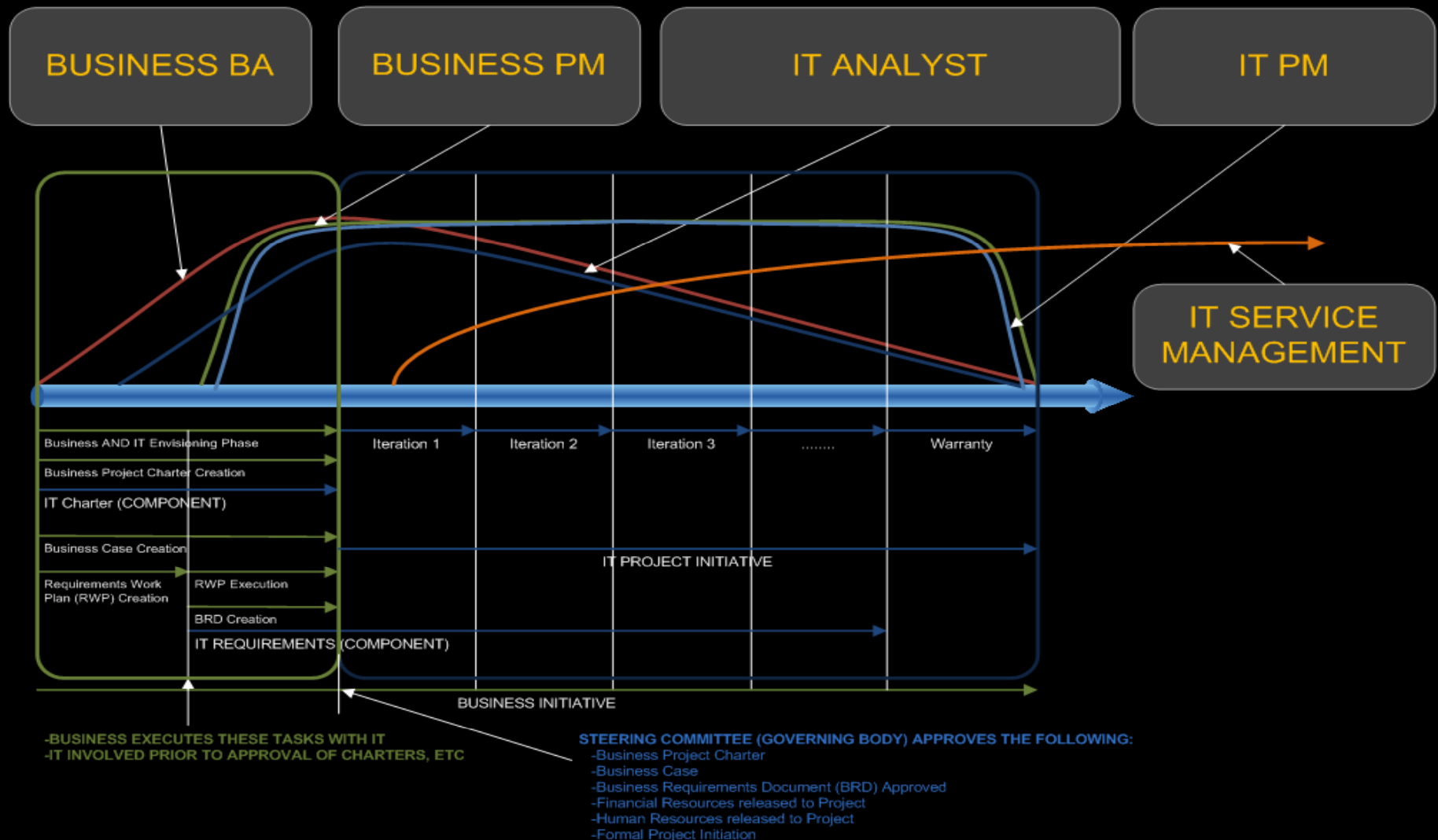
- Business Making IT Successful
- IT Does Not Engage Until Specific Criteria Are First Met
- A model for Misalignment





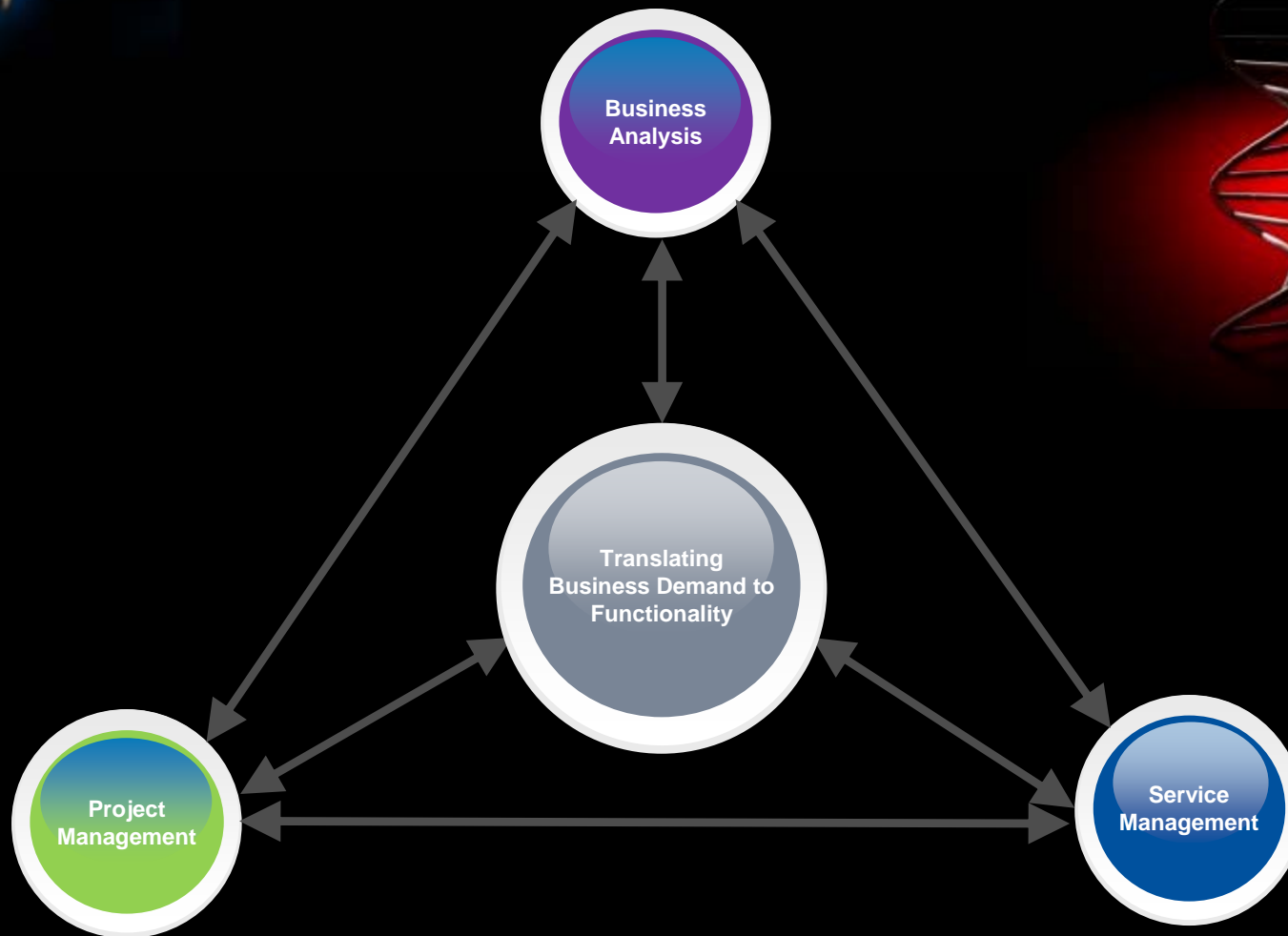
IT Project Engagement Process

- IT Making The Business Successful
- IT and Business Engaging Collaboratively
- A model for Alignment





Requirements Traceability DNA -The Three Pillars





Project Transitioning

Transition 1: Engagement

- Why ITIL:
 - At this stage, the Project serves the Service Management group
 - The project helps to ensure that the SM group is engaged early and consistently
 - Ensures that modified SM services are aligned to deliverables:
 - Service Level Management
 - Capacity, Availability, and Continuity Management
 - ITIL V3 contains a phases specific to Service Management Design
- You've hired a BA/PM/SM and they appear to have all the answers at the start of the project (What do you do?)
- Engage BA/PM/SM resources and phases Early and Tightly
- Continually trace requirements
- Communicate changes widely and frequently
- Enable feedback loop for changing / elaborating requirements (Change Control)
- Feedback future needs to the beginning of the cycle
- Plan to continually look back to ensure alignment from BA to PM to SM Capacity (current trends meeting plan?)



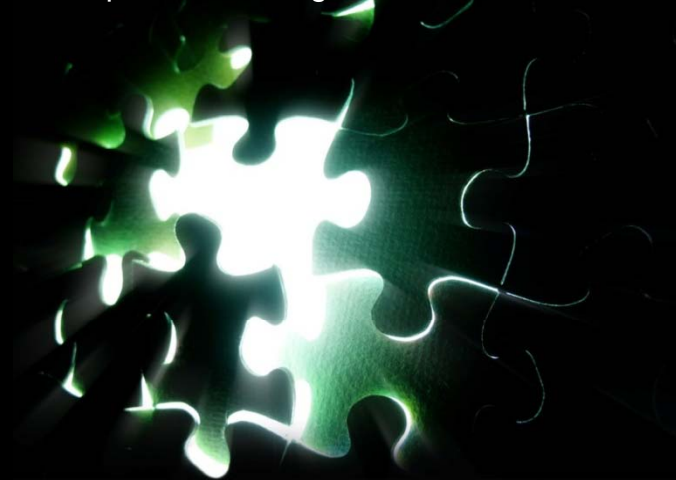


Project Transitioning

Transition 2: Deployment and Warranty

- Why ITIL:
 - At this stage, Service Management serves the Project
 - ITIL helps the project move smoothly into production
 - ITIL V3 places a major emphasis on Service Transitioning as a formal phase of Service Management
 - Ensures that the requirements move beyond the end of the project
 - Manages changes to the CMDB, Media Libraries, Service Catalogue and SLAs

- The Project Is the Thing That happens in the middle (Apologies to PMs in the audience)
- Has ITIL Operational Transition occurred?
- Training gaps closed?
- Release Management engaged?
- Change Management processes in place and followed?
- Confirm traceability of Requirements through to new current state deliverables?
- Service Desk / incident management / problem management readiness and transition





Project Transitioning

Transition 3: Disengagement

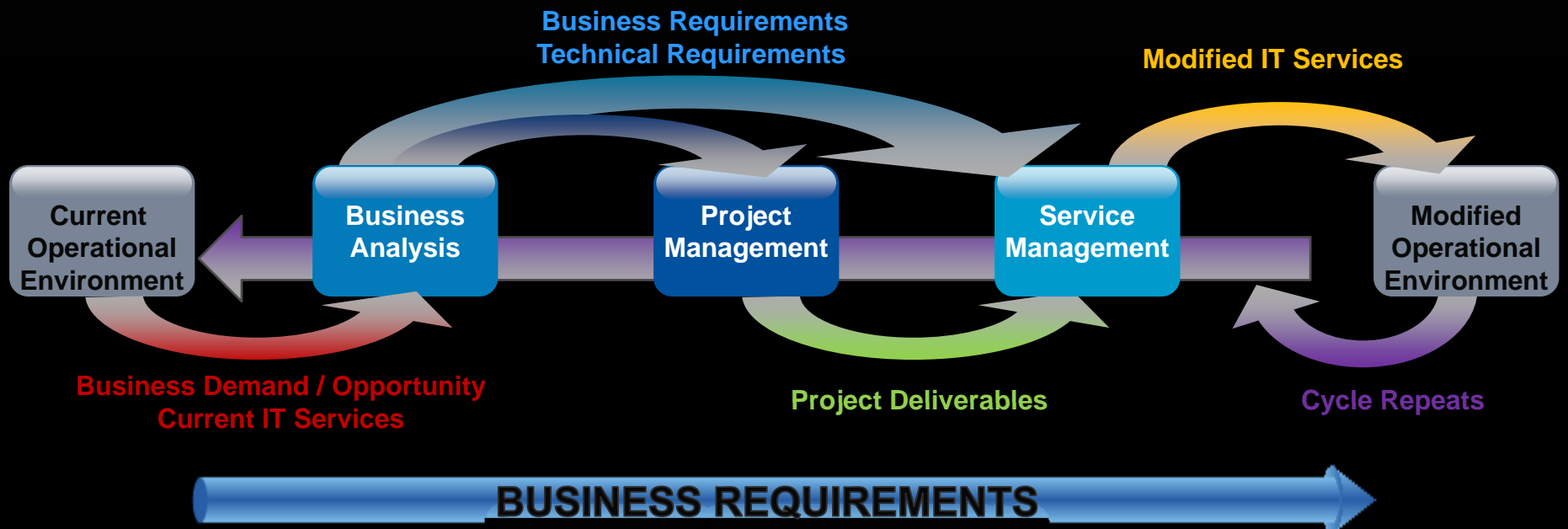
- Your Project is wrapping up....Now what?
- Looking back for success
- ITIL V3 also places focus on CI (Continual Improvement) as a discipline of Service Management
- Don't end the project until look-back is complete and gaps are closed through warranty
- Customer Satisfaction Survey executed?
- Deliverables Realization confirmed with client?
- Metrics pulled prior to Project Start? (Review Business Case / Charter)
- Are requirements traceable to the new operating environment?
- Deliverables Gaps Closed?
- Plan in place to close remaining gaps?
- Lessons Learned?
- Notification to other PM's of lessons learned (Deming Cycle at the PMO level)?
- Documents and Templates updated to reflect lessons learned?





Binding IT Activities, Deliverables and Services

- Business Requirements are the common touch-point
- BA, PM, and SM become aligned through the requirements lifecycle





OCF – Oasis Connected Frameworks

-Bringing It All Together

Primary IT Functional categories are:

- Business Analysis
- Project Management
- Service Management

Supporting Guiding Principles:

- Financial Management through Total Cost of Ownership metrics
- Quality Management through ongoing Service Levels metrics (Project and Operational)
- Management of the Delivery of business functionality (Project and Operational)
- Encouraging and supporting good Governance
- Corporate Guiding Principles are incorporated into the Oasis Connected Frameworks (OCF)

Supporting Disciplines and Frameworks:

- | | |
|------------------------------|--|
| ▪ Service Management | ITIL / ITSM / MOF (integrated with MSF 3.0) |
| ▪ Process Quality Management | 6Sigma |
| ▪ Governance | SOX / COBIT / FOIP |
| ▪ Enterprise Architecture | EABOK / ZACHMANN / TOGAF (The Open Group Architecture Framework) |
| ▪ Business Analysis | BABOK |
| ▪ Project Management | PMBOK / RUP / AGILE |

The OCF is repeatable and scalable depending on the following influencers:

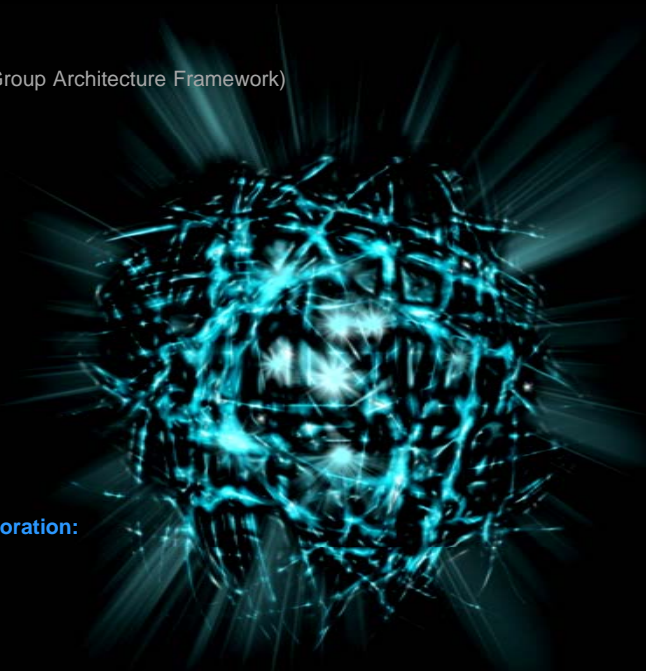
- Business drivers
- Business appetite for change
- Cultural Maturity
- Existing IT Methodologies
- Capability Maturity of both the business and competing influencers (CMM)

All disciplines are based on the following SMART Objectives:

- Specific
- Measurable
- Achievable
- Realistic
- Timely

Metrics are defined and tracked through both Recursive Quality Management and Progressive Elaboration:

- Plan
- Do
- Check
- Act





OCF – Oasis Connected Frameworks -A New Model Emerges

- The model is intended to be:
 - Open, Scalable and Light Weight (Remember SAA)?
 - Adaptable to various SM, PM, and BA methodologies
 - Technology and Vendor Independent
 - Leverage best of breed based bodies of knowledge on the state of the industry (Frameworks and Methodologies)
 - Integrate using Business Requirements as the common theme
- Will Focus on the following phases:
 - Organizing Business Analysis and Governance
 - Aligning Governance and consensus building
 - Solutioning Project Management, Service Management, and EA
 - Implementing Project Management and Service Management
 - Supporting Service Management and Quality Management - Kaizen / Deming

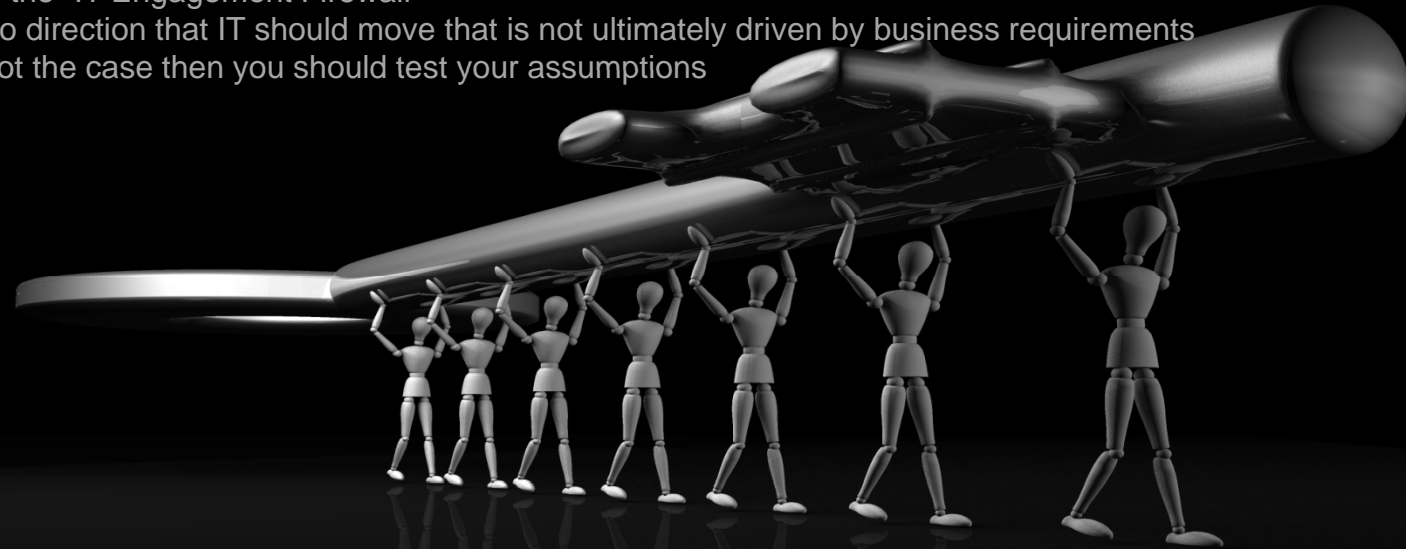




OCF – Oasis Connected Frameworks

-Key Points

1. Always keep in mind the expectations of the business:
 - 1) Anticipate and Respond quickly to Business Opportunities / Demands
 - 2) Keep expenses in line
 - 3) Continually maintain and improve service levels and align to Governance models
 - 4) There is no '4'
2. Beware of the "IT Engagement Firewall"
3. There is no direction that IT should move that is not ultimately driven by business requirements
4. If that is not the case then you should test your assumptions

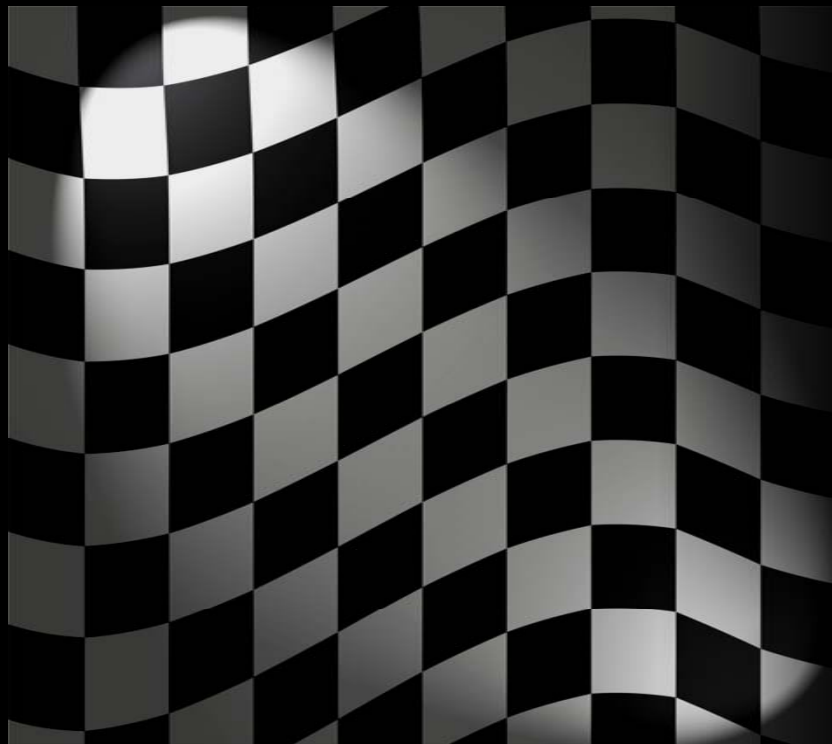




OCF – Oasis Connected Frameworks

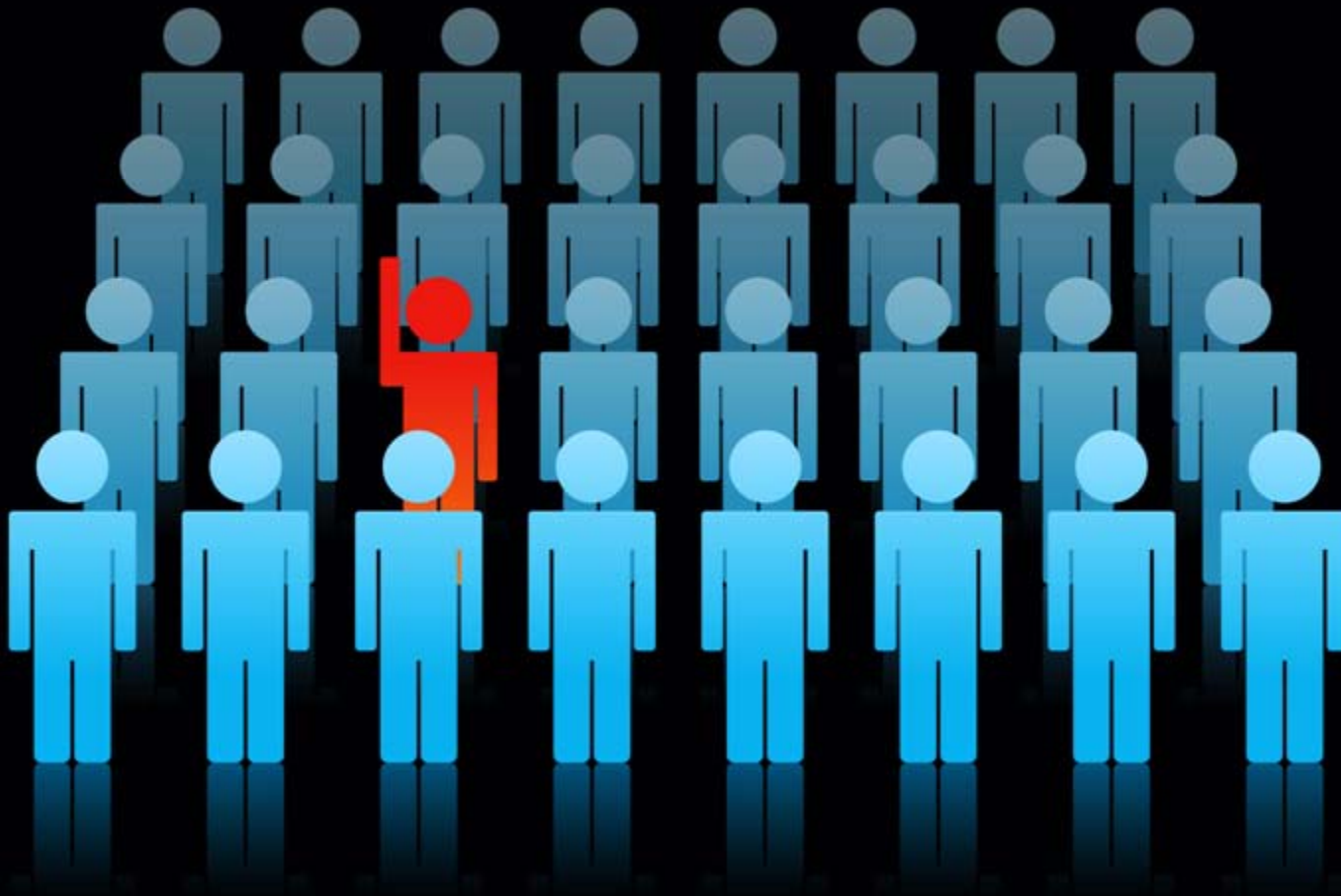
-Summary

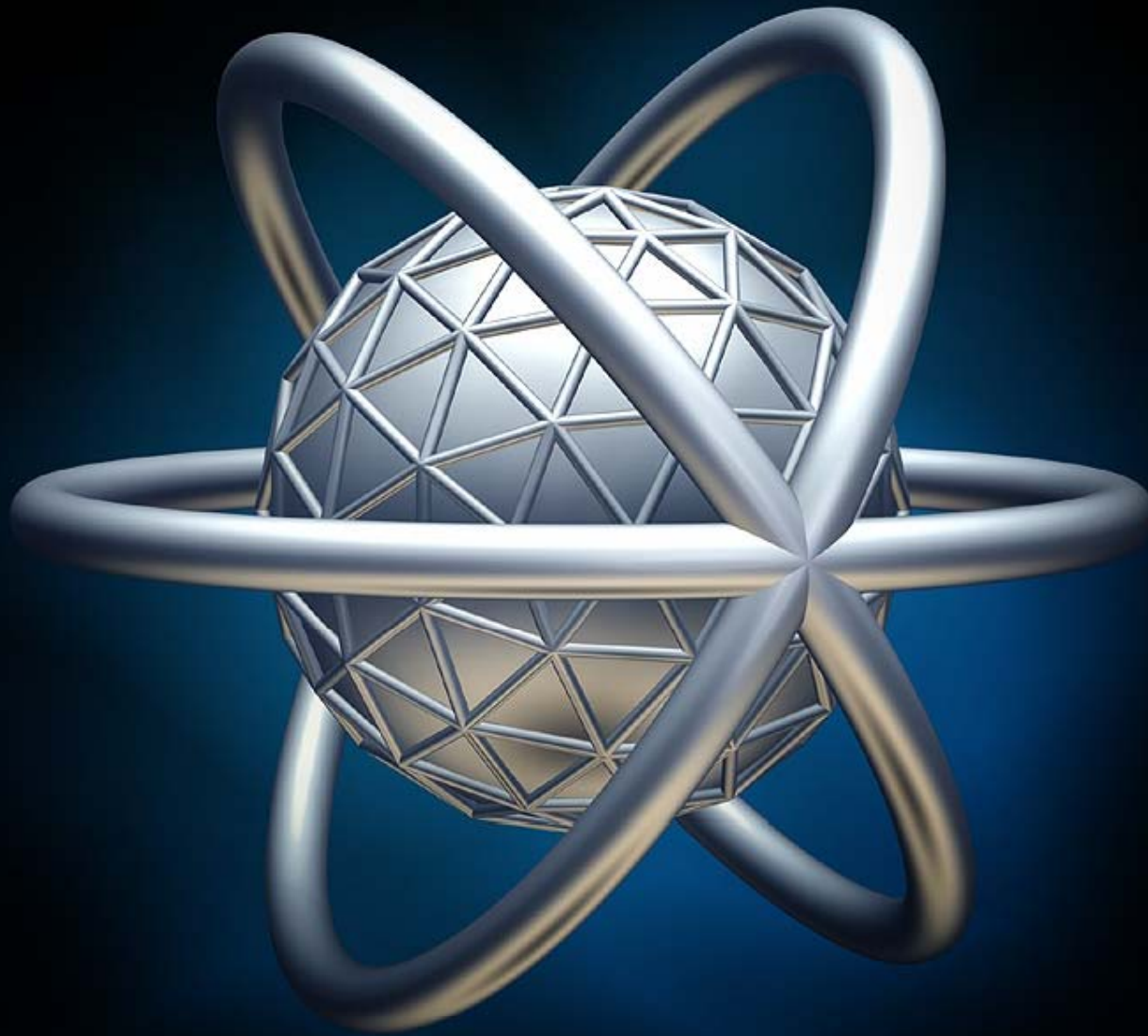
1. Trace business requirements to activities and trace activities to outcomes
2. Engage and establish baselines with the business early, formally and tightly
3. Align to the vision and look back to learn / socialize lessons
4. Ensure that BA, PM and SM activities become tightly integrated
5. Encourage desired staff behaviour to align with business expectations
6. Watch out for a gap between activities and requirements (this is an early warning for Misalignment)
7. You have the keys, now enjoy the ride!





QUESTIONS





THANK YOU