

**IPA Planning Kit with sample Question sets for VNP**

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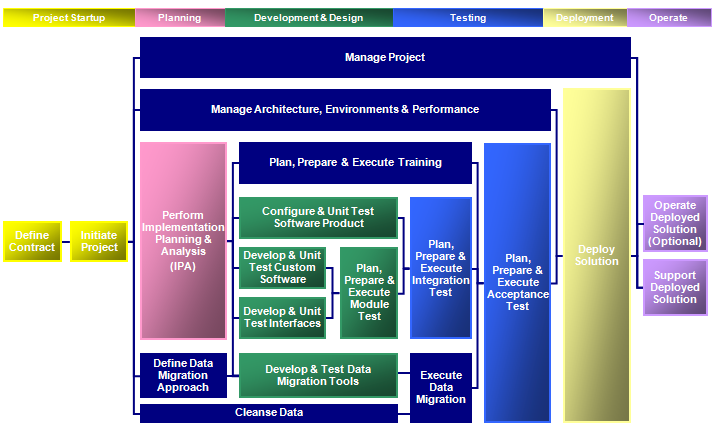
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# Preparing for the Implementation Planning Analysis (IPA)

The Implementation Planning Analysis is typically the first activity in the overall Comverse ONE implementation process. This process requires a dedicated customer project team during the period of the IPA analysis, and will take from 1 to 4 months, depending on the complexity of the project. The goals of the IPA process are to:

1. analyze customer requirements in detail, and develop a full solution design including customer, service and product model to be defined in Comverse ONE
2. identify implementation strategy
3. enable a common understanding of roles and expectations during the implementation
4. identify integration points and the development efforts during implementation
5. validate the overall technical architecture of the solution
6. identify test strategy
7. identify plan to prepare the site for installation of hardware, systems software and the application (Technical Architecture task)
8. identify timeframes
9. identify level of effort



The Comverse methodology is to assign a small, highly-focused project team to work with the customer’s project team and subject matter experts. Where possible, they install a copy of the Comverse ONE software on the customer site, and the customer project team receives Comverse ONE training that enables them to gain hands-on experience with the functionality during the IPA. This facilitates communication and feedback from the customer functional areas during the information-gathering phase. It also allows ongoing business rules modeling, pilot data conversions, and configuration training early in the process. As the Comverse project team gathers information during the IPA meetings, they begin leveraging additional in-house areas of expertise within Comverse for special integration, sizing and configuration issues.

At the end of this analysis, the Comverse project team will deliver the IPA document. The completed IPA document will:

1. Enable Comverse to design any custom? functionality required for the Comverse ONE products
2. Contain a detailed customer, service and product data model
3. Have field-level design specifications for any external systems interfaces
4. Include descriptions of customer service and other user interfaces
5. Describe the use of Application Programmer Interfaces (APIs) where needed
6. Document the proposed system architecture
7. Contain a detailed workflow and timetable for project activities, including customer and Comverse responsibilities

In conjunction with the IPA, the Comverse project team will work with the client to produce a Technical Architecture document. This document will validate the technical architecture, size the hardware components, and document the plan for system production, delivery, and installation.

# Project Complexity Factors

Project timeframes are typically a function of the level of complexity of the project. The factors below usually determine whether a project will be simple or complex and consequently are closely related to the expected project duration. This information can be used early on by the customer in order to correctly set expectations.

1. ***Client familiarity with Comverse ONE*:**  
   Are any Comverse products already in-house? Are they being used? Have the client team members received training? This will shorten the project cycle.
2. ***Type of service(s) being offered, also referred to as Lines of Business, or LOBs:***  
   The number of lines of business being deployed, the services within them and the phasing to be used; e.g. Wireline switched telephony, wireless, broadband services, wireline un-switched telephony, internet services.
3. ***Maturity of the client product offering:***

Is there an existing customer base, along with mature, embedded business processes and functionality? Projects that involve newer services and/or without existing customers are less complicated to implement

1. ***Data volumes:***

How much transactional data (particularly usage) will be run through the system? What are the archiving requirements (in particular for prepaid versus postpaid)?

1. ***Integration Needs.***

With how many systems will Comverse ONE have to integrate? What are the integration requirements?

1. ***Geography.***

How distributed are the operations? Are customer service and billing operations distributed over a wide geographic area? If so, special consideration may need to be taken in architecting the systems solution. For example, the necessity of remote application servers (for user interfaces), remote replicated databases, etc

1. ***Customer Business Drivers***.

Are the motivating factors for the implementation time, functionality, technology, capacity, or other? How mature is the existing environment (system, process, users)?

1. ***Data Conversion***.

Are there existing customer, service or product data that will have to be migrated from an existing data base? What are the types, locations and volumes of that data? To what extent will the data need to be cleansed before migrating?

1. What is the data volume?
2. Will the current offerings need to be duplicated in Comverse ONE?
3. Are there any specific conversion requirements? E.g. conversion window, impact to 3rd party systems.
4. To what extent will the data need to be cleansed before migrating?

# Staffing for the IPA

## Customer Core Team

The customer’s project team should consist of the following key players:

1. Overall project sponsor: a high profile figure in the customer’s organization with decision-making authority and the power to ensure full involvement of personnel from each of the necessary departments
2. IT manager responsible for HW/SW acquisition and overall system administration including DBA.
3. Billing manager responsible for billing systems operation
4. Marketing and/or Product Management manager with responsibility for products and services
5. Finance manager with responsibility for accounting practices, taxes and G/L requirements
6. Customer Service manager with responsibility for CSR and collections activities
7. Network Operations manager responsible for interface to various network elements, both for usage and provisioning;

## Client Project Implementation Team

The client project team should consist of representatives from each of the functions described below. Skill profiles that are considered appropriate are as follows:

1. From the IT area, the project team members should be technically adept with UNIX and Oracle skills and preferably also with billing system experience. These team members will be responsible for system acceptance testing, preparing for production, system administration, and release management.
2. From the Billing group, a person knowledgeable in Oracle, UNIX, and Comverse ONE processes who will be responsible for billing processes and operation.
3. The marketing/sales/product management team members should have a full understanding of the company’s product and service offerings and a good knowledge of potential future marketing directions. These team members should also be familiar with the profiles of the company’s customers.
4. The finance team members must be familiar with the legal system financial requirements for the country in which the system will run, taxing and regulatory requirements, and the A/R, and G/L requirements for the system.
5. Customer Service team members should be knowledgeable of GUIs, customer care, bill inquiry, adjustments and collection processes.
6. Network operations team members should understand how customer accounts are provisioned within the network, how changes are made, how new products are enabled, etc.

## Production Team

### User Categories

The user categories involved in the running/use of Comverse ONE are the following:

1. **Customer Service Representatives (CSR’s).** These users are responsible for front-line customer care, including billing queries, and are normally authorized to review and make adjustments to individual accounts within certain amount thresholds.
2. **Supervisors.** These users are responsible for handling customer care escalation, and are authorized to perform general tasks not associated with individual accounts.
3. **Financial Users**. These users are responsible for financial reporting, accounting, and potentially for high-level customer care tasks involving financial investigations.
4. **Billing Operators.** These users are responsible for configuring and running billing processes, payment processing, and other Comverse ONE specific tasks.
5. **System Administrators**. These users monitor system activity and maintain the UNIX network and the Oracle database functioning properly, including archiving and recovery.
6. **Marketing/Finance Liaison**. This role is one of co-ordination between the two groups to ensure that pricing structures to be marketed are technical feasible for implementation in the billing system as products, rates and services. This may be a part-time role.

Note that the user profiles do not necessarily map to the customer’s organizational structure. It is left to the customer to decide the company’s organizational lines; for example they may choose to move some of the CSR’s functions to the Financial User, etc.

### Tasks

The following is a brief overview of the kinds of tasks that are commonly performed using Comverse ONE. It is not an exhaustive list.

1. **Order Entry**. Management of orders includes in some cases inventory management, order history, provisioning, contracts management, etc. Order Entry will require a large investment in the beginning to populate the system for rollout. Demand for this activity will vary with the rate of introduction of new products and sales made.
2. **Maintaining Products and Rates**. A task exists for establishing, implementing and maintaining products, rates and discounts in Comverse ONE.
3. **Treatments and Collections**. Once an invoice has been dispatched to the customer the responsibility for it passes to bill follow up. This task is to monitor payments and collections and if a customer does not pay a complete invoice then manage the dispute and/or apply late payment interest.
4. **Creating and Modifying Accounts**. This task involves creation of new customer accounts, assigning products and services to them, and recording initial refund requests.
5. **Adjustment Processing**. This task involves making adjustments to customers’ accounts up to a predetermined maximum and initiating refund requests.
6. **Payment Processing**. This task involves configuring the Comverse ONE processes that handle payments for accounts.
7. **Investigations**. This task involves investigation of particular transactions set aside by several Comverse ONE modules before they are completely processed. For example, if a call record cannot be processed by Comverse ONE, then Comverse ONE places the record on hold pending investigation.
8. **Reporting**. This task involves the generation and browsing of any predefined reports included with Comverse ONE.
9. **Journaling/Accounting**. The journals module is normally used to provide a feed to the customer’s G/L system.
10. **System Configuration**. This task involves handling hardware and operating system configuration and setting new users and user groups.
11. **System Monitoring**. This task involves monitoring system performance and making adjustments as needed to operating system, hardware and software parameters.
12. **Database Maintenance**. This task involves performing regular database backups, archiving of selected data, performing recoveries as needed, and monitoring space usage in database and translation logs.
13. **Customer Billing Inquiries**. This task involves handling inquiries made by end customers with regards to their invoices. This will entail interrogating Comverse ONE for customer account information and passing the information to the customer, possibly leading to adjustments being made.
14. **Billing Operations**. This task involves scheduling and monitoring bill runs to ensure that bills are issues regularly and that errors are corrected. System interface error files, such as usage and payments, should also be monitored.

## Comverse Team

During the IPA process, Comverse works with the customer to define the detailed requirements for the project implementation. This is a joint process with the core project teams from the customer and Comverse. Defining these requirements enables the project teams to:

1. specify the solution
2. develop the detailed project plan
3. clarify project task responsibilities
4. establish schedule and cost parameters

The analysis is accomplished through a series of functional breakout meetings with the various areas of customer expertise (as defined below), and results in the IPA document.

### Comverse Role

The scope of activities typically undertaken by the Comverse project team during a project implementations are

1. CUSTOMER AND PRODUCT DATA MODEL
2. analyze and construct the customer data model (account hierarchies and account characteristics)
3. analyze and construct the product data model (product groups, lines, elements and packages)
4. analyze and construct the charge data model (rates, discounts, contracts)
5. perform with the customer the initial installation of the complete data model to reinforce their training
6. resolve questions on data mapping for conversion of customers, Subscribers and products
7. support the customer in modeling additional products and rates as needed
8. SYSTEM INSTALLATION AND CONFIGURATION
9. establish initial Comverse ONE system parameters with feedback from the customer as needed
10. analyze and configure Comverse ONE tables with participation by and feedback from the customer (administration/customer/catalog tables as appropriate)
11. complete pre-install and initialization of Comverse ONE when customer systems environment is established
12. Deliver and install CBS 3 production system
13. provide table configuration information to the customer for ongoing interface mapping and to help resolve questions as they arise
14. IMPLEMENTATION
15. assist customer in analyzing interface alternatives
16. provide technical specifications to customer for interface APIs and evaluate queries on existing vs. requested functionality; provide response and/or manage design as appropriate
17. provide feedback to customer for their migration and conversion plans, analysis and design documents
18. provide support to customer during system, integration, and parallel testing; respond to questions and resolve issues as identified
19. coordinate Comverse ONE technical support as required for customer
20. provide input when feasible to customer on business processes as they relate to Comverse ONE
21. PROJECT MANAGEMENT
22. manage functional deliverables in Comverse ONE
23. document requests for additional functionality and analyze alternatives for implementation
24. coordinate responses to questions and support requests from customer
25. manage and resolve issues as identified
26. coordinate response to customer training and documentation requests

# IPA Process

## IPA Meeting Structure

The matrix below is a sample meeting structure; the actual meetings will be scheduled at a more granular level. Please note that the meetings and their structure may vary depending on the type of implementation. It indicates the knowledge and functional areas that are needed during the IPA process. The left axis indicates the topics that are discussed in the IPA meetings, and the top axis indicates the functional areas to be represented in those meetings.

Table 1 - Client Involvement During the IPA Topic Discussions

| **GROUP 🡺** | Project Lead/  Project team | Sales/  Marketing | Product Mgmt | Ordering/  Provisioning | Customer Service | System Admin | Network Ops | Billing  Ops | Finance/  Regulatory |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **TOPIC 🡻** |
| **Architecture** | **X** |  |  | **X** |  | **X** | **X** | **X** |  |
| **Data Model** | **X** | **X** | **X** | **X** | **X** |  |  |  |  |
| **Rating, Charging, & Promotions** | **X** | **X** | **X** |  | **X** |  |  |  | **X** |
| **Mediation and Roaming** | **X** |  |  |  |  | **X** | **X** |  |  |
| **Billing and Financials** | **X** |  | **X** |  |  |  |  | **X** | **X** |
| **Customer and Order Management**  **(CNS: Support)** | **X** | **X** | **X** | **X** | **X** |  |  | **X** |  |
| **Data Extracts and Reports**  **(CNS: Support)** | **X** |  |  |  |  | **X** |  | **X** | **X** |
| **Migration**  **(CNS: Support)** | **X** |  |  | **X** |  | **X** | **X** | **X** |  |
| **Operations, Administration, and Maintenance**  **(CNS: Support)** | **X** |  |  |  |  | **X** | **X** | **X** |  |
| **Miscellaneous** | **X** |  |  |  |  |  |  |  |  |