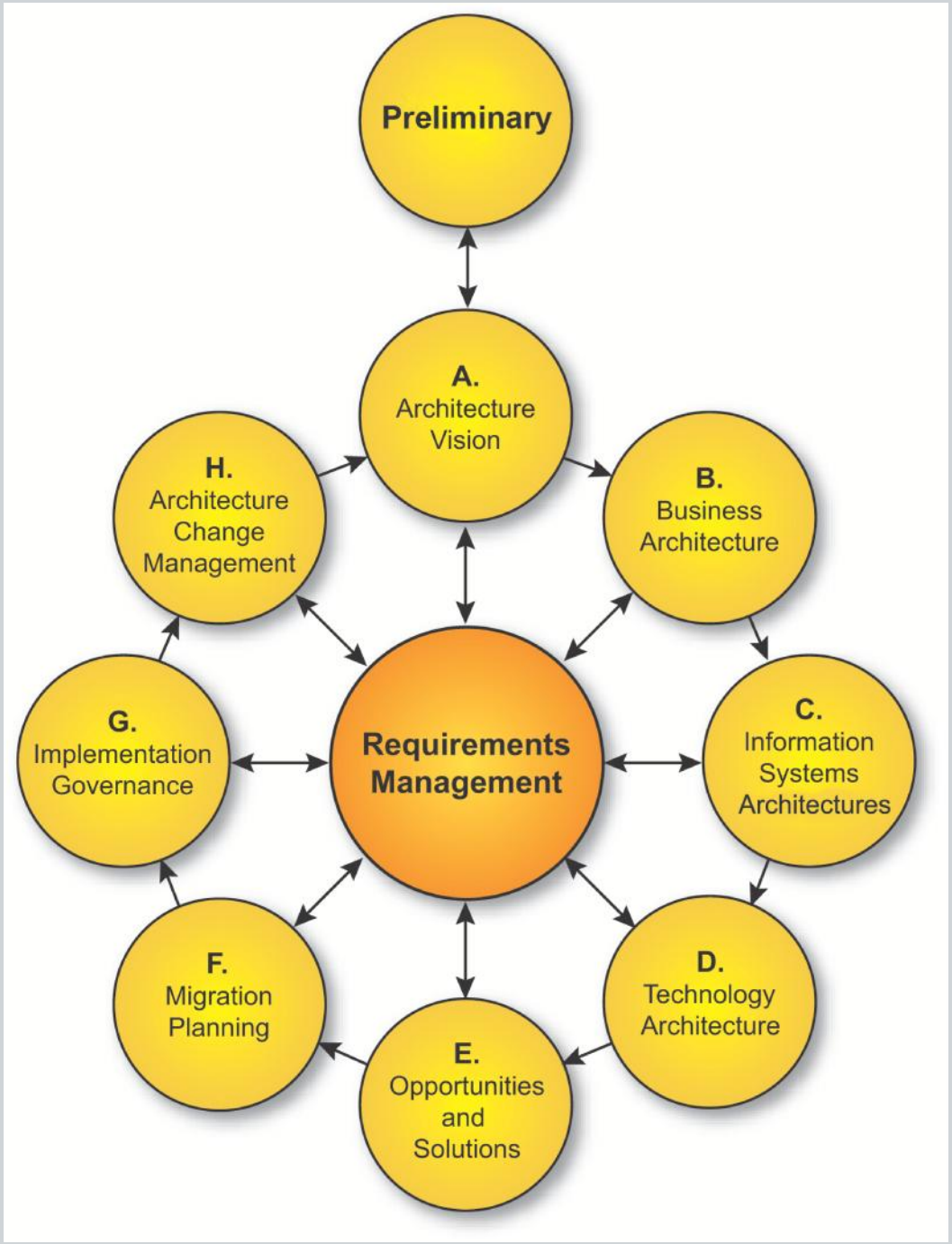
TOGAF®

Version 9.1 Enterprise Edition

Module 23
Migration Planning Techniques

THE Open GROUP

Published by The Open Group, 2011



Migration Planning Techniques

TOGAF®

Roadmap

Part I - Introduction
Preface, Executive Overview, Core Concepts, Definitions and Release Notes
Part II – Architecture Development Method
Introduction to ADM
ADM Phase Narratives
Part III – ADM Guidelines and Techniques
Guidelines for Adapting the ADM Process
Techniques for Architecture Development
Part IV – Architecture Content Framework
Content Metamodel
Architectural Artifacts
Architecture Deliverables
Building Blocks
Part V – Enterprise Continuum and Tools
Enterprise Continuum
Architecture Partitioning
Architecture Repository
Tools for Architecture Development
Part VI – Reference Models
Foundation Architecture: Technical Reference Model
Integrated Information Infrastructure Reference Model
Part VII – Architecture Capability Framework
Architecture Board
Architecture Compliance
Architecture Contracts
Architecture Governance
Architecture Maturity Models
Architecture Skills Framework

- Part III, ADM Guidelines and Techniques, Chapter 28

TOGAF®

Module Objectives

The objectives are to:

- Understand the techniques used in Phases E and F for Migration Planning
- Key areas include:
  - Using the *Implementation Factor Assessment and Deduction Matrix* to document factors impacting the Architecture Implementation and Migration Plan.
  - The purpose of the *Consolidated Gaps, Solutions and Dependencies Matrix*
  - The purpose of an *Architecture Definition Increments table*
  - Using the *Enterprise Architecture State Evolution Table* with the TRM
  - Using the *Business Value Assessment Technique*

The Implementation Factor Assessment and Deduction Matrix

- This matrix documents the factors impacting the Implementation and Migration Plan
- It is created in Step 1 of Phase E and updated throughout Phase E
- It is an input to Phase F
- It serves as a repository for architecture implementation and migration decisions
- The matrix should include
  - a list of the factors to be considered
  - their descriptions, and
  - the deductions that indicate the actions or constraints that have to be taken into consideration when formulating the plans

Example – Implementation Factor Assessment and Deduction Matrix

Implementation Factor Assessment and Deduction Matrix		
Factor	**Description**	**Deduction**
<Name of Factor>	<Description of Factor>	<Impact on Migration Plan>
Change in Technology	Shut down the message centers, saving 700 personnel, and have them replaced by email.	• Need for personnel training, re-assignment • Email has major personnel savings and should be given priority
Consolidation of Services		
Introduction of New Customer Service		

The Consolidated Gaps, Solutions and Dependencies Matrix

- This matrix is used when consolidating the gap analysis results from Phases B to D
- It is used to group the gaps identified in the domain architecture gap analysis results and assess potential solutions and dependencies to one or more gaps
- It is first created in Step 3 of Phase E
- It is an input to Phase F
- This matrix can be used as a planning tool when creating work packages
- The identified dependencies will drive the creation of projects and migration planning in Phases E and F

Example – Consolidated Gaps, Solutions and Dependencies Matrix

Consolidated Gaps, Solutions, and Dependencies Matrix				
No.	**Architecture**	**Gap**	**Potential Solutions**	**Dependencies**
1	Business	New Order Processing Process	Use COTS software tool process Implement custom solution	Drives applications (2)
2	Application	New Order Processing Application	COTS software tool X Develop in-house	
3	Information	Consolidated Customer Information Base	Use COTS customer base Develop customer data mart	

Architecture Definition Increments table

- This table allows the architect to plan a series of Transition Architectures outlining the status of the enterprise architecture at specified times
- It is created in Phase F
- It consists of listing the projects and then assigning their incremental deliverables across the Transition Architectures

Architecture Definition Increments table

Architecture Definition - Project Objectives by Increment (Example Only)				
Project	April 2007/2008	April 2008/2009	April 2009/2010	Comments
	Transition Architecture 1: Preparation	Transition Architecture 2: Initial Operational Capability	Transition Architecture 3: Benefits	
Enterprise e-Services Capability	Training and Business Process	e-Licensing Capability	e-Employment Benefits	
IT e-Forms	Design and Build			
IT e-Information Environment	Design and Build Information Environment	Client Common Data Web Content Design and Build	Enterprise Common Data Component Management Design and Build	
. . .	. . .	. . .	. . .	. . .

The Transition Architecture State Evolution Table

- This allows the architect to show the proposed state of the architectures at various levels using the TRM
- This is part of the Implementation and Migration Plan
  - showing proposed state of the architectures as they evolve
- It should be drawn up in Phase F, listing:
  - Services from the TRM used in the enterprise
  - Transition Architectures
  - Proposed transformations,
- All Solution Building Blocks (SBBs) should be described with respect to their delivery and impact on services

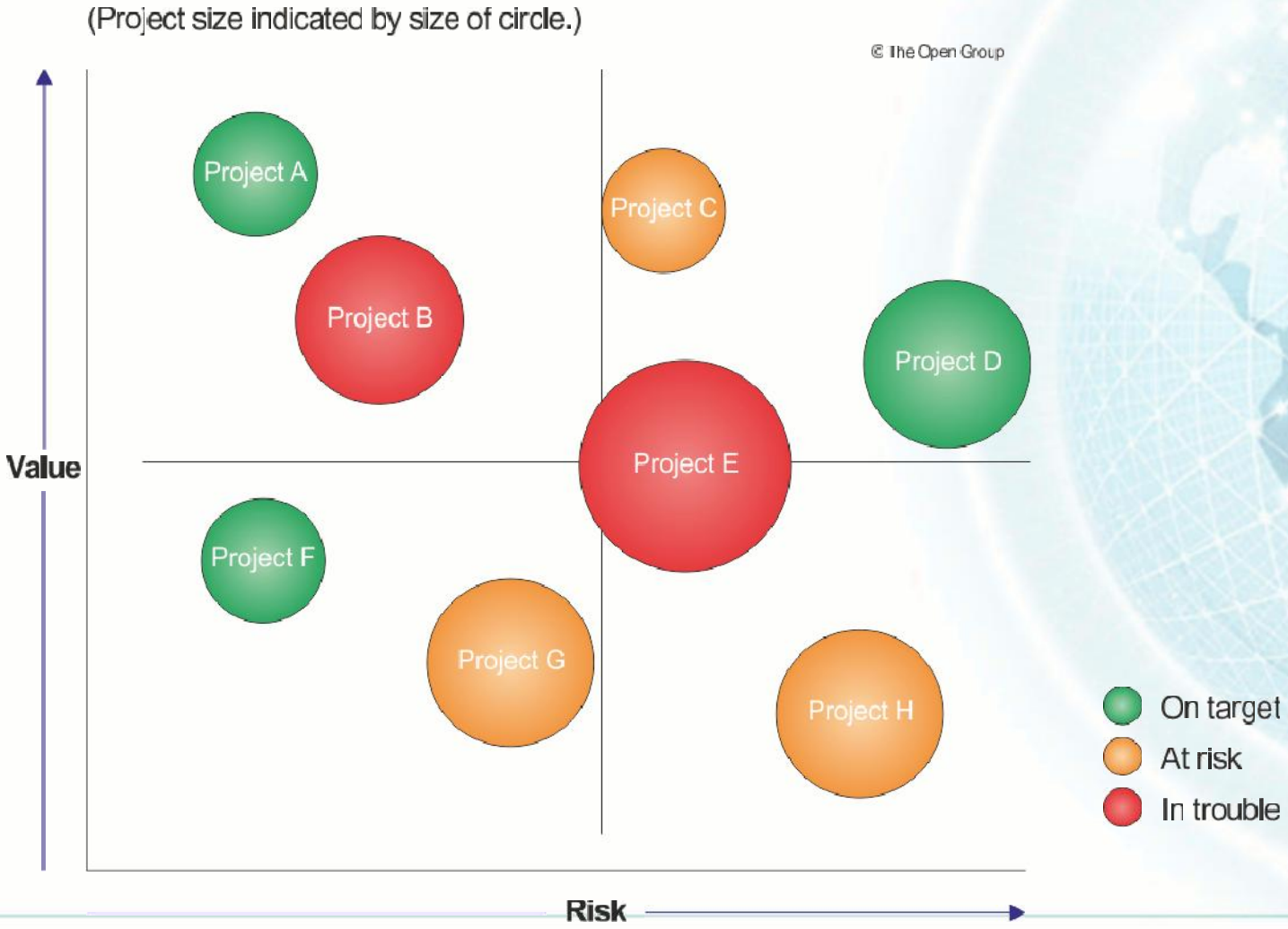
The Transition Architecture State Evolution Table

Architectural State using the Technical Reference Model				
Sub-Domain	**Service**	**Transition Architecture 1**	**Transition Architecture 2**	**Transition Architecture 3**
Infrastructure Applications	Information Exchange Services	Solution System A (replace)	Solution System B-1 (transition)	Solution System B-2 (new)
	Data Management Services	Solution System D (retain)	Solution System D (retain)	Solution System D (retain)
. . .	. . .	. . .	. . .	. . .

The Business Value Assessment Technique

- This technique to assess business value includes drawing up a matrix with value and risk index dimensions
- It is used in Phase F to develop an estimated value to the business for each project
- The value index should include criteria such as compliance to principles, financial contribution, strategic alignment, and competitive position
- The risk index should include criteria such as size and complexity, technology, organizational capacity, and impact of a failure. Each criterion should be assigned an individual weight

The Business Value Assessment Technique



TOGAF®

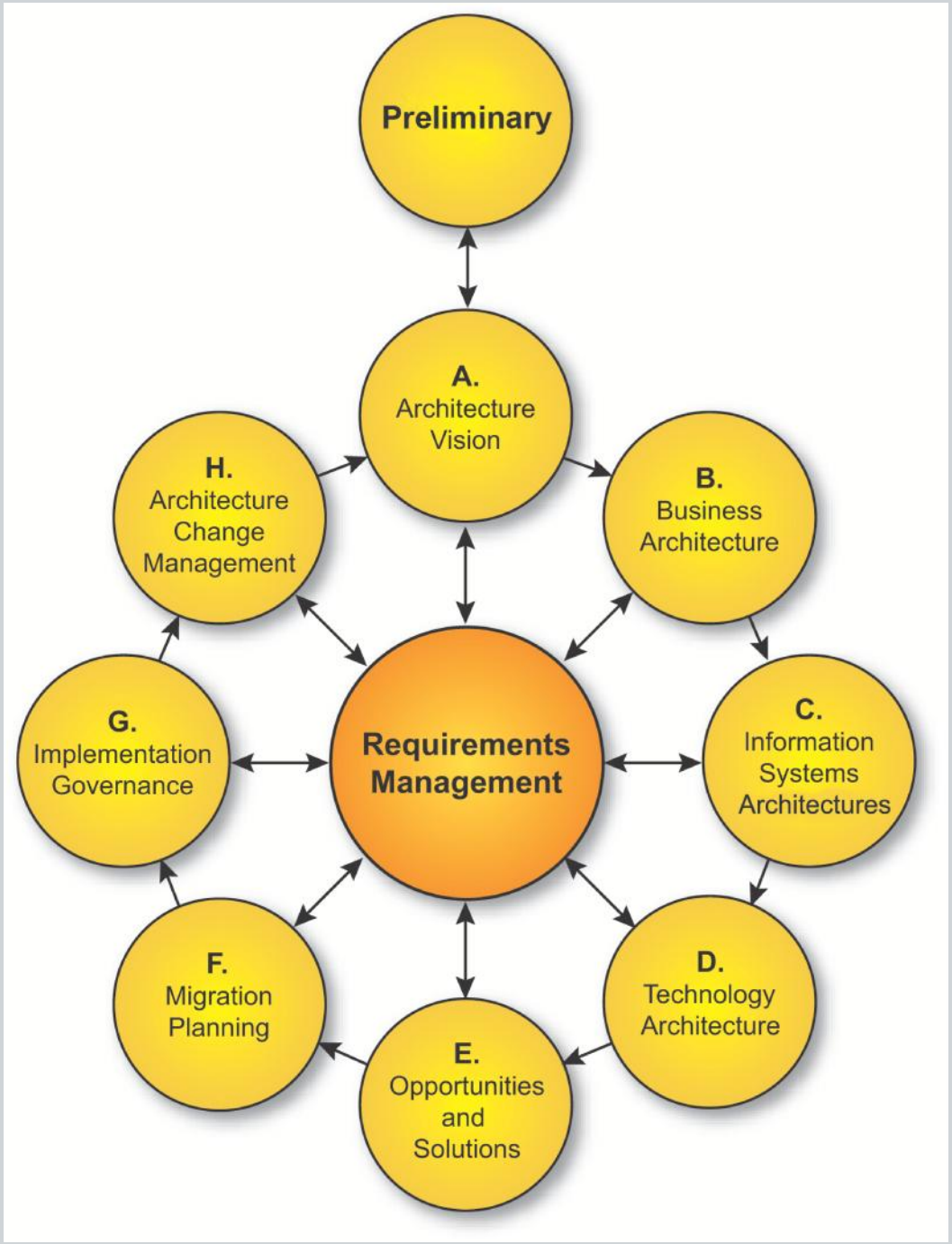
Summary

This module has explained the techniques used in Phase E and F for migration planning. In particular, it has discussed:

- 2 matrices (the *Implementation Factor Assessment and Deduction Matrix* and the *Consolidated Gaps, Solutions and Dependencies Matrix).*
- 2 tables (the *Architecture Definition Increments table* and the *Enterprise Architecture State Evolution Table).*
- 1 technique *(*the *Business Value Assessment Technique)*

Exercise: The Business Value Assessment Technique

- Suppose that you are the Chief Architect of a large project in your enterprise. The project complies with your architecture principles. It will make a considerable financial contribution. It is strategically aligned with your business and it will strengthen your competitive advantage.
- However the project is complex and will use cutting-edge technology. Your organizational capacity is high, but the impact of failure is also high.
- Score each criterion on a scale of 0 to 10 and give each a weighting using this information and your experience and so produce a value index dimension and a risk index dimension for the project.



Migration Planning Techniques

TOGAF®