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Version 9.1 Enterprise Edition
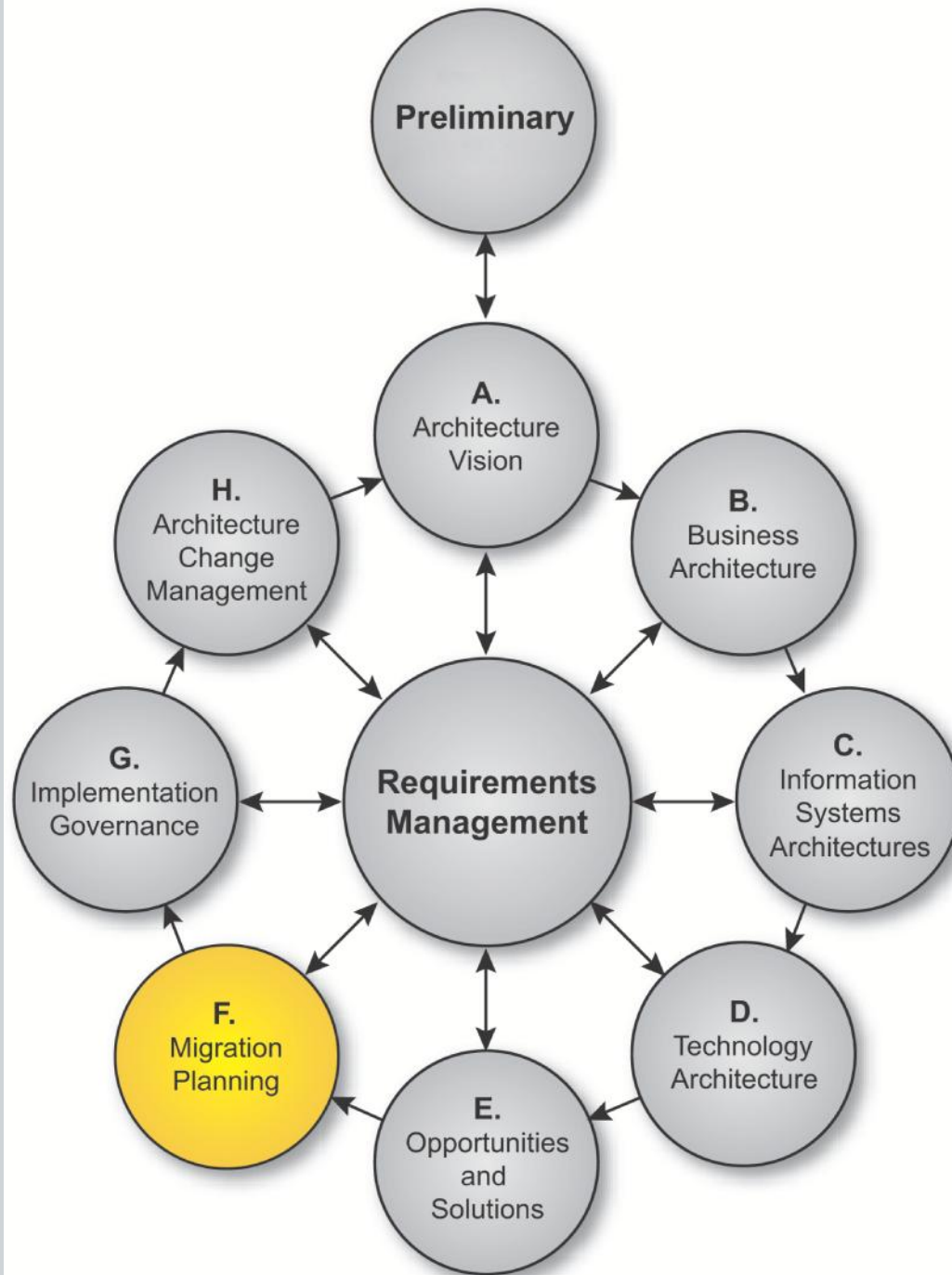
Module 25
Phase F
Migration Planning

THE *Open* GROUP

Phase F
Migration
Planning

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Module Objectives

The objectives of this module are to understand:

- The objectives of Phase F, Migration Planning
- What it consists of
- What inputs are needed for it
- What the outputs are

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Phase F Objectives

- Finalize the Architecture Roadmap and the supporting Implementation and Migration Plan

- Ensure that the Implementation and Migration Plan is coordinated with the enterprise's approach to managing and implementing change in the enterprise's overall change portfolio

- Ensure that the business value and cost of work packages and Transition Architectures is understood by key stakeholders
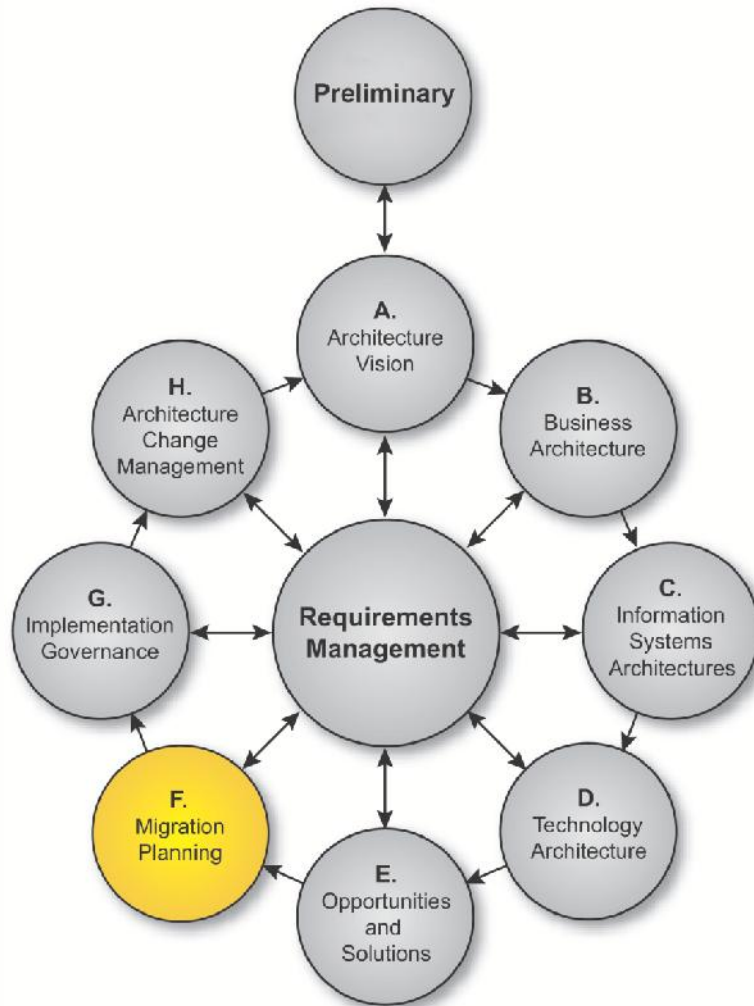
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Approach

- The focus is creation of the Implementation and Migration plan in co-operation with project and portfolio managers
- Activities include the dependencies, costs, and benefits of the various migration projects within the context of the enterprise's other activity
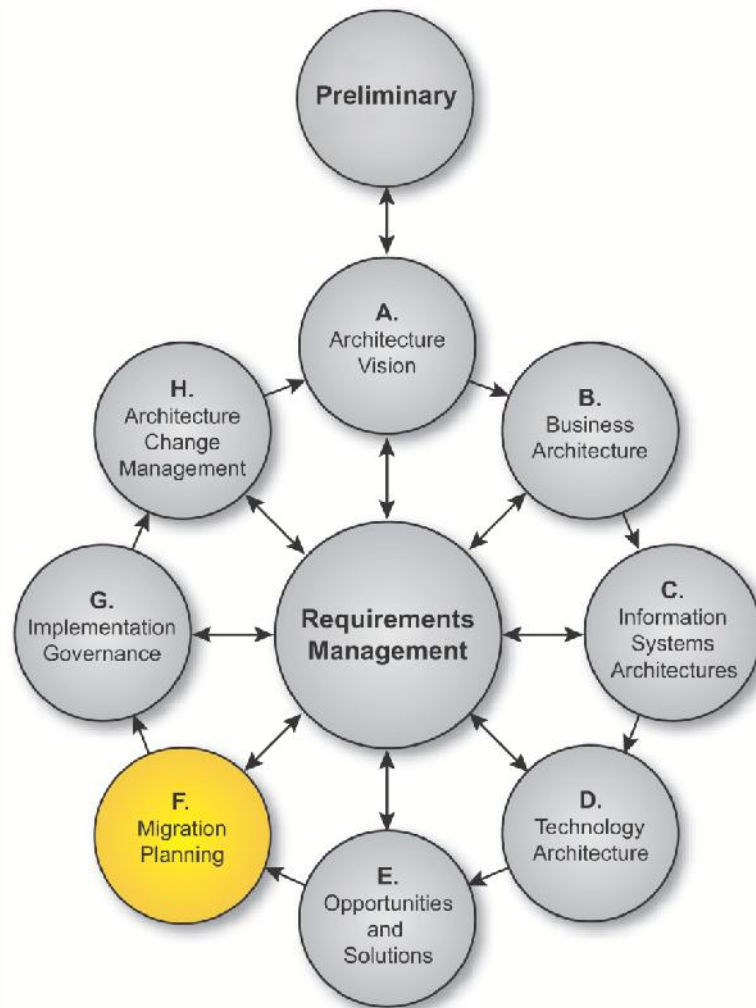
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Phase F: Inputs

- Request for Architecture Work
- Communications Plan
- Organizational model for enterprise architecture
- Governance Models and Frameworks
- Tailored Architecture Framework
- Statement of Architecture Work
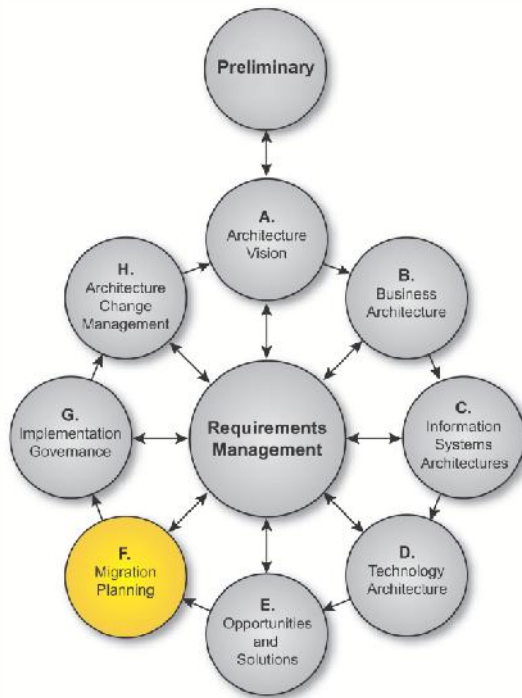- Architecture Vision
- Architecture Repository

Continued

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Phase F: Inputs

- Draft Architecture Definition Document, including:
  - Transition Architectures, if any
- Draft Architecture Requirements Specification
- Change Requests for existing programs and projects
- Architecture Roadmap, including:
  - Identification of work packages
  - Identification of Transition Architectures
  - Implementation Factor Assessment and Deduction Matrix
- Capability Assessment
- Implementation and Migration Plan (outline)

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Steps

7. *Complete the architecture development cycle and document lessons learned*

6. *Complete the Implementation & Migration Plan*

5. *Confirm Architecture Roadmap and Architecture Definition Document*

4. *Prioritize migration projects through the conduct of a cost/benefit assessment and risk validation*

3. *Estimate resource requirements, project timings, and availability/delivery vehicle*

2. *Assign a business value to each work package*

1. *Confirm management framework interactions for the Implementation & Migration Plan*

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Step 1:Confirm Management Framework Interactions for the Implementation and Migration Plan

- Coordinate the Implementation and Migration Plan with the management frameworks in use within the organization
    - Business Planning
    - Enterprise Architecture
    - Portfolio/Project Management
    - Operations Management

- The outcome of this step may well be that the Implementation and Migration Plan could be part of a different plan produced by another one of the frameworks with enterprise architecture participation

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Step 2: Assign a Business Value to Each Work Package

- Establish what constitutes business value within the organization, how value can be measured, and then apply this to each one of the projects and project increments

- If Capability-Based Planning is in use, then business values associated with the capabilities and associated capability increments should be used to assign the business values for deliverables

- Use the work packages as a basis of identifying projects that will be in the Implementation and Migration Plan

- Risks should be assigned to the projects by aggregating risks identified in the Consolidated Gaps, Solutions, and Dependencies Matrix

- Estimate the business value for each project using the Business Value Assessment Technique

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Step 3: Estimate Resource Requirements, Project Timings, and Availability/Delivery Vehicle

- Determine costs to create the capability
- Determine costs to run and sustain the capability
- Identify opportunities to offset costs by decommissioning existing systems
- Assign resources to each activity and aggregate them at the project increment and project level

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Step 4:Prioritize the Migration Projects through the Conduct of a Cost/Benefit Assessment and Risk Validation

- Prioritize the projects by ascertaining their business value against the cost of delivering them

- Determine the net benefit of all of the SBBs delivered by the projects

- Verify that the risks have been effectively mitigated and factored in

- Gain the requisite consensus to create a prioritized list of projects that will provide the basis for resource allocation

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Step 5:Confirm Architecture Roadmap and Update Architecture Definition Document

- Update the Architecture Roadmap including any Transition Architectures
  - Review the work to date to assess what the time-spans between Transition Architecture should be, taking into consideration the increments in business value and capability and other factors, such as risk.
  - Once the capability increments have been finalized, consolidate the deliverables by project.
  - A Transition Architecture State Evolution Table can be used to show the proposed state of the domain architectures

- If the implementation approach has shifted as a result of confirming the implementation increments, update the Architecture Definition Document.
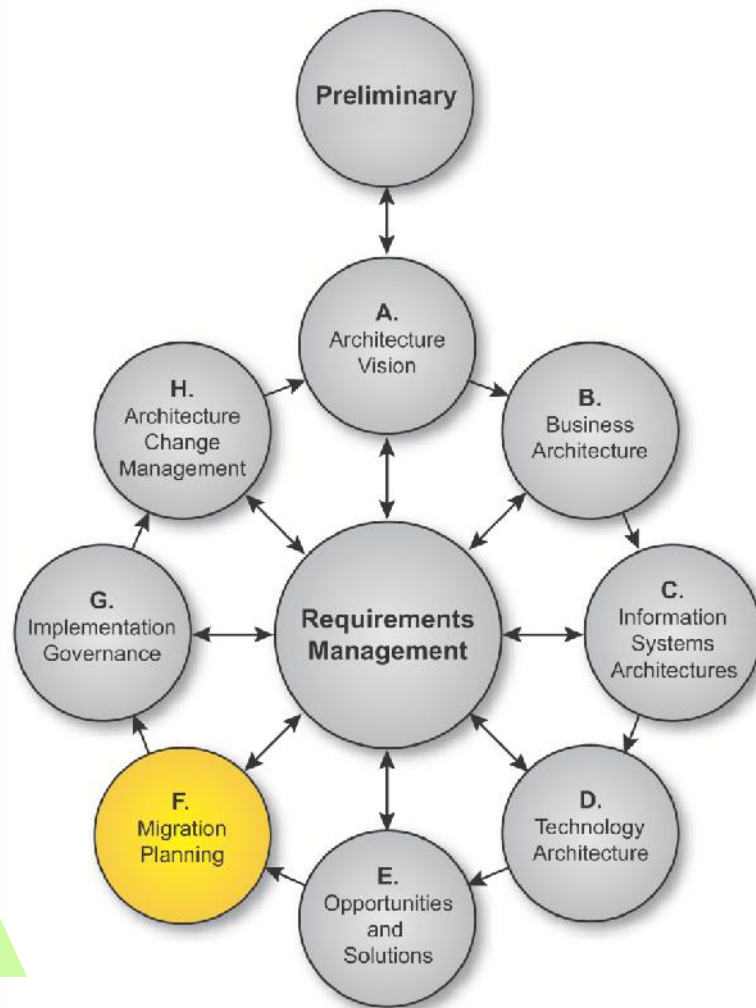
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Step 6: Generate the Implementation & Migration Plan

- Integrate all of the projects and activities as well as dependencies and impact of change into a project plan
- Any Transition Architectures will act as portfolio milestones
- All external dependencies should be captured and included, and the overall availability of resources assessed
- Project plans may be included within the Implementation and Migration Plan

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Step 7: Complete the Architecture Development Cycle and Document Lessons Learned
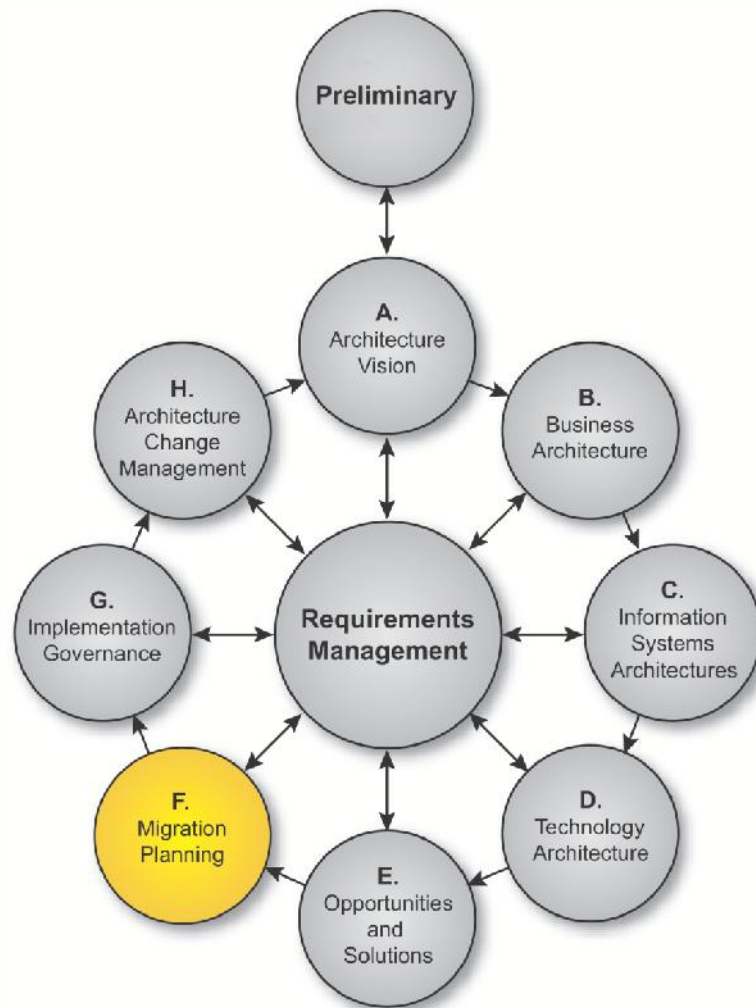
- This step transitions governance from the development of the architecture to the realization of the architecture

- Lessons learned during the development of the architecture should be documented and captured by the appropriate governance process in Phase H as inputs to managing the Architecture Capability

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Phase F Outputs

- Implementation and Migration Plan (detailed)
- Finalized Architecture Definition Document, including:
  - Finalized Transition Architectures, if any
- Finalized Architecture Requirements Specification
- Finalized Architecture Roadmap
- Re-Usable ABBs
- Requests for Architecture Work for a new iteration of the ADM (if any)
- Implementation Governance Model
- Change Requests

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Summary

- Phase F addresses migration planning – how to move from the Baseline to the Target

- It includes creating the finalized Architecture Definition Document, Architecture Roadmap and the detailed Implementation & Migration Plan

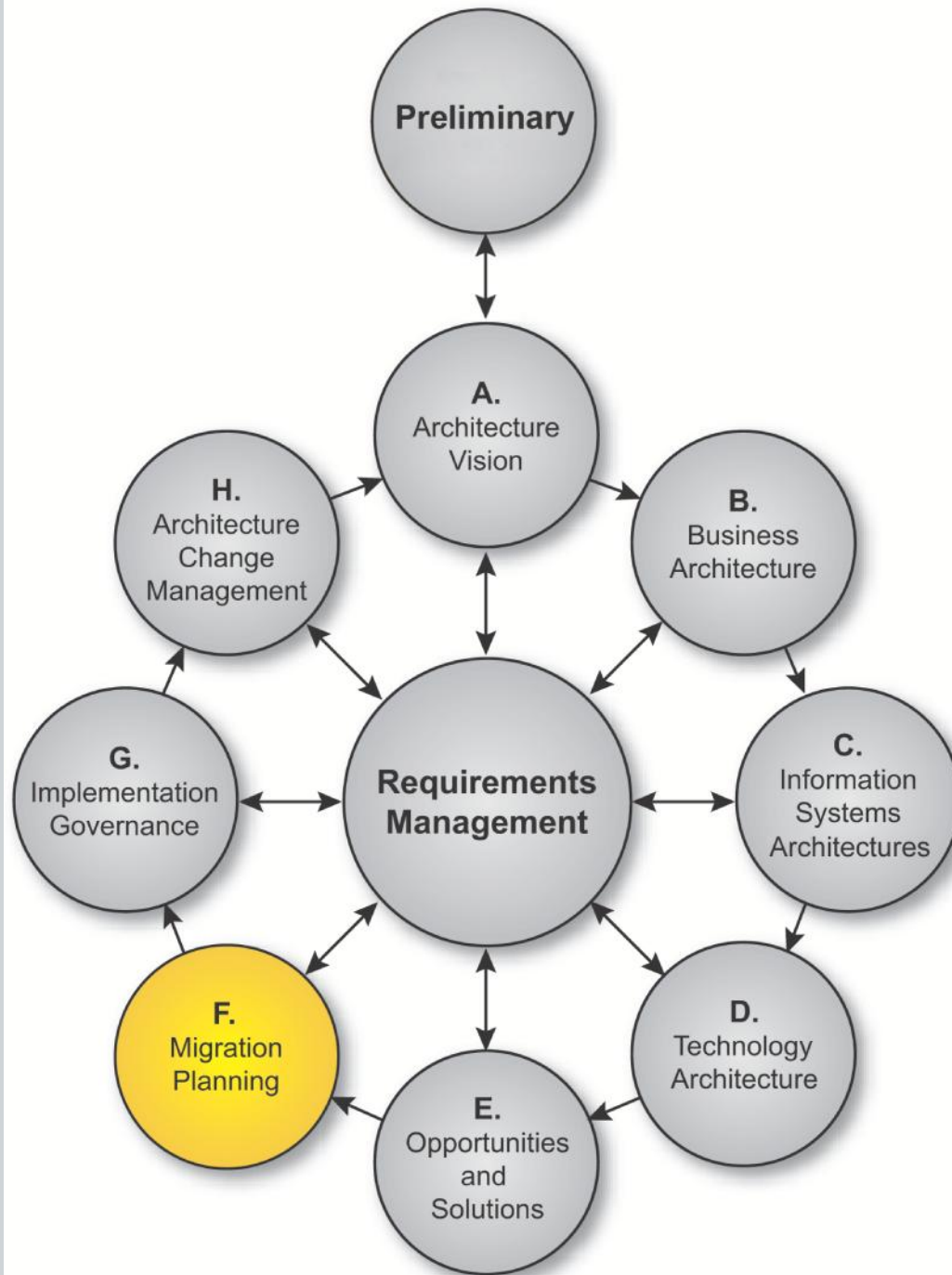- At the completion of this phase the preparation for implementation has been completed

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Summary

Phase F: Migration Planning			
Objectives	**Steps**	**Inputs**	**Outputs**
Finalize the Architecture Roadmap and the supporting Implementation and Migration Plan

Ensure that the Implementation and Migration Plan is coordinated with the enterprise's approach to managing and implementing change in the enterprise's overall change portfolio

Ensure that the business value and cost of work packages and Transition Architectures is understood by key stakeholders | Confirm management framework interactions for Implementation and Migration Plan

Assign a business value to each work package

Estimate resource requirements, project timings, and availability/delivery vehicle

Prioritize the migration projects through the conduct of a cost/benefit assessment and risk validation

Confirm Architecture Roadmap and update Architecture Definition Document

Complete the Implementation Roadmap and Migration Plan

Complete the development cycle and document lessons learned | Request for Architecture Work Communications Plan Organizational Model for Enterprise Architecture Governance models and frameworks Tailored Architecture Framework Statement of Architecture Work Architecture Vision Architecture Repository

Draft Architecture Definition Document, including:
• * Transition Architectures, if any

Draft Architecture Requirements Specification Change Requests for existing programs and projects

Architecture Roadmap

Capability Assessment, including:
• * Business Capability
• * IT Capability

Implementation and Migration Plan (outline), including:
• * High-level Implementation and Migration Strategy | Implementation and Migration Plan (detailed), including:
• * Implementation and Migration Strategy
• * Project and portfolio breakdown of the implementation
• * Project charters (optional)

Finalized Architecture Definition Document, including:
• * Finalized Transition Architectures, if any

Finalized Architecture Requirements Specification

Finalized Architecture Roadmap

Re-Usable Architecture Building Blocks

Requests for Architecture Work for a new iteration of the ADM cycle (if any)

Implementation Governance Model

Change Requests for the Architecture Capability arising from lessons learned |

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Test Yourself Question

Q. When preparing the detailed Migration Plan, which of the
   following should not be a consideration?

A Risk Assessment

B Project Priorities

C Availability of Resources

D Cost/benefit assessment

E Choice of target platform

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Phase F Migration Planning

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