

# IPI Best Practices ...

## Process Guide for Road Map Step - 1

### STEP: #1 - Define & Assess Addressable Markets

<b>Begins With:</b> Sanctioned Idea & assembled Opportunity Team	<b>Purpose:</b> In the context of the idea, establish the boundary conditions of the addressable marketplace and conduct an initial analysis of their strategic potential.	<b>Ends With:</b> Agreement on market boundaries, drivers, trends & risk
<b>Inputs:</b> <ul style="list-style-type: none"> <li>Business Vision/Mission</li> <li>Business Proposal</li> <li>Secondary Market Info:           <ul style="list-style-type: none"> <li>- Architecture/Technology Assessment</li> <li>- Political/Regulatory Assessment</li> <li>- Economic Review</li> <li>- Global Market Model</li> <li>- Benchmarking Evaluation</li> <li>- Competitive Analysis</li> </ul> </li> </ul>	<b>Work Activities:</b> <pre> graph LR     A[Segment Major Markets] --&gt; B[Describe Addressable Market(s)]     C[Verify/Adapt Project Mission Statement &amp; Objectives] --&gt; B     B --&gt; D[Assess Market Attractiveness]     B --&gt; E[Conduct Tech. vs Mkt. Risk Assessment]     </pre>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>Confirmed/Modified Project Mission</li> <li>Market Research Report:           <ul style="list-style-type: none"> <li>- Assessment of Market Attractiveness</li> <li>- Fundamental Market Drivers &amp; Customer Trends</li> </ul> </li> <li>Market Descriptions (Qualitative &amp; Quantitative)</li> <li>Initial Risk Assessment</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>Clear "GO!" Investment Decision</li> <li>Portfolio Prioritization</li> <li>Sponsor Involvement/Empowerment</li> <li>Project Leader Selection Criteria</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>Creating the Customers Value Propositions (Intro &amp; Step 1 Module)</li> <li>Coordinating Activities Workbook, Activities 0 - 15</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>Five Forces Analysis</li> <li>Technology Reach vs Market Reach Diagram</li> <li>Technology Road Map</li> </ul>

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## Process Guide for Road Map Step - 2

### STEP: #2 - Segment Customers & Identify Critical Needs

<b>Begins With:</b> Agreement on addressable market boundaries & drivers	<b>Purpose:</b> To divide the market into major categories of Customers and establish an initial understanding of their needs, wants & desires.	<b>Ends With:</b> Consensus on Customer segments & critical needs
<b>Inputs:</b> <ul style="list-style-type: none"> <li>• Project Mission Statement</li> <li>• Initial release of Market Research Report</li> </ul>	<b>Work Activities:</b> <p>Core Team:</p> <pre> graph LR     A[Launch Peer Teams] --&gt; B[Peer Team(s)]     B --&gt; C[Conduct Customer Interviews]     B --&gt; D[Identify Customer Segments]     B --&gt; E[Develop Customer Profiles]     C --&gt; F[Prepare Competitive Assessments]     D --&gt; F     E --&gt; F     F --&gt; G[Conduct Team Review]   </pre>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>• Updated Market Research Report: <ul style="list-style-type: none"> <li>- Customer segmentation &amp; selection rationale</li> <li>- Critical needs &amp; decision criteria</li> <li>- Customer drivers &amp; prelim. profiles</li> <li>- Competitive positioning in segments</li> </ul> </li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>• Integrity of BU's market/competitive research information &amp; analysis</li> <li>• Advanced approval/funding to hire consultants for primary research &amp; customer interviews, if required</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>• Creating the Customers Value Propositions (Step 2 Module)</li> <li>• Coordinating Activities Workbook (Activities 16 to 19 )</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>• AEIOU /\$APPEALS /Kano Model</li> <li>• Customer Value Profile / Voice Tables</li> <li>• Four Stage Segmentation</li> <li>• Team Practices (Modules 4 to 1</li> </ul>

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## Process Guide for Road Map Step - 3

### STEP: #3 - Conduct In-depth Assessments of Customer Segments

<b>Begins With:</b> Agreement on Customer Segmentation	<b>Purpose:</b> To develop a full understanding of how well the idea can penetrate each segment and identify entry barriers.	<b>Ends With:</b> Qualified understanding of Market/Customer Segments
<b>Inputs:</b> <ul style="list-style-type: none"> <li>• Updated Market Research Report:           <ul style="list-style-type: none"> <li>- results of primary research</li> </ul> </li> <li>• Customer Satisfaction Data</li> <li>• Applicable Competitive Analysis</li> <li>• Account Plans</li> </ul>	<b>Work Activities:</b> <p>Core Team:</p> <pre> graph LR     LT[Launch Peer Teams] --&gt; RVS[Review &amp; Validate Segments Value &amp; Risk]     subgraph PT [Peer Team(s)]         direction TB         DS[Develop Segment Profiles] --&gt; ASA[Assess Segment Attractiveness]         DS --&gt; CCSWOT[Conduct Competitive SWOT]         ASA --&gt; VPRA[Conduct VPRA]         CCSWOT --&gt; VPRA     end   </pre>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>• Final Market Research Report:           <ul style="list-style-type: none"> <li>- Segment Profiles               <ul style="list-style-type: none"> <li>- Segment Attractiveness</li> </ul> </li> <li>- Competitive SWOT               <ul style="list-style-type: none"> <li>- VPRA results</li> </ul> </li> </ul> </li> <li>- Identification of major market risks/action plans</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>• Integrity of internally processed competitive information</li> <li>• Advanced approval to use external sources, if required</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>• Creating the Customers Value Proposition (STEP 3 Module)</li> <li>• Coordinating Activities Workbook, Activities 20 to 24</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>• Five-Forces analysis</li> <li>• War Games</li> <li>• VPRA</li> <li>• Risk Reduction Planning</li> </ul>

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## Process Guide for Road Map Step - 4

### STEP: #4 - Select and Prioritize Target Segments

<b>Begins With:</b> Full Understanding of the Voice of the Customer	<b>Purpose:</b> To narrow the team's focus to those markets that are inherently the most attractive versus those the BU can best serve.	<b>Ends With:</b> Agreement on Market Opportunities, Prioritization & Risks
<b>Inputs:</b> <ul style="list-style-type: none"> <li>Final updates to Market Research Report</li> <li>Customer Satisfaction and Relationship Information</li> <li>Readiness Assessment of Business Unit</li> </ul>	<b>Work Activities:</b> <p>Core Team:</p> <pre> graph LR     A[Select criteria &amp; prioritize/partition segments] --&gt; B[Validate Segment Prioritization &amp; Competency Assessments]     B --&gt; C[Select Target Segments &amp; Iterate VPRA]     C -- feedback --&gt; A     D[Identify &amp; Prioritize Customer Requirements] --&gt; E[Assess Internal Competency to Satisfy Requirements]     E -- feedback --&gt; B     </pre> <p>Peer Team(s):</p>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>Preliminary Market Product Plan: <ul style="list-style-type: none"> <li>Identification of Target Segment(s) &amp; rationale</li> <li>List of critical requirements</li> <li>List of segment SWOT</li> <li>Prioritization of Market Opportunities</li> <li>Assessment of BU ability to sustain a competitive advantage</li> </ul> </li> <li>Market/Business Risk Assessments</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>Support/collaboration from key functional managers</li> <li>Sponsor involvement in internal assessments</li> <li>Common goals, incentives, and measurements</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>Creating the Customer Value Propositions (Step 4 Module)</li> <li>Coordinating Activities Workbooks (Activities 25 to 32)</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>Analytical/Hierarchy Process</li> <li>Translating customer needs into requirements (Module 4 VOC) <ul style="list-style-type: none"> <li>Organization Readiness Assessment (IDD Module 3)</li> <li>Value Prop Readiness Assm't</li> </ul> </li> </ul>

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## Process Guide for Road Map Step - 5

### STEP: #5 - Develop Value Propositions and Market Strategies

<b>Begins With:</b> Agreement on target Segment Selections	<b>Purpose:</b> To understand what distinguishes each segment and propose the best strategies for market success.	<b>Ends With:</b> Alignment on market strategies & reconfirmed project mission
<b>Inputs:</b> <ul style="list-style-type: none"> <li>• Preliminary Market/ Product Plan</li> <li>• Business Process Assessments</li> <li>• Customer Satisfaction Measurements</li> </ul>	<b>Work Activities:</b> <p>Core Team:</p> <pre> graph LR     A[Prioritize Critical Customer Needs] --&gt; B[Assess Links of Needs to Internal Capacity]     B --&gt; C[Determine Priority Areas of Focus]     C --&gt; D[Align with Mkt Strategies &amp; Re-evaluate Project Mission, Scope, and Objectives]     E[Map Critical Needs to Value Tree] --&gt; F[Construct CVP's]     F --&gt; G[Link Value Trees to Business Processes &amp; Cust. Sat.]     G --&gt; H[Develop Market Strategies]     </pre> <p>Peer Team(s):</p>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>• Release 1 of the Market/ Product Plan <ul style="list-style-type: none"> <li>- Business Proposal</li> <li>- Target Market Situation Analysis</li> <li>- Mapping of Needs to Requirements</li> <li>- Competitive Analysis</li> <li>- Market/Business Risk</li> </ul> </li> <li>• Customer requirements <ul style="list-style-type: none"> <li>• Signed off Project Mission (by Business Team Leader)</li> </ul> </li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>• Clear Investment / Divestment decision criteria</li> <li>• Support/collaboration of Business Process owners &amp; Quality Organization</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>• Creating the Customers Value Proposition (Step 5 Module)</li> <li>• Coordinating Activities Workbook (Activities 32 to 42)</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>• Analytic Hierarchy Process</li> <li>• Tree Diagrams</li> <li>• VPRA</li> <li>• Risk Reduction Planning</li> </ul>

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## Process Guide for Road Map Step - 6

### STEP: #6 - Form and Launch Business Team

<b>Begins With:</b> Selection of Business Team Leader/Project Manager	<b>Purpose:</b> To establish team based management practices and an environment of collaboration.	<b>Ends With:</b> Team commitment to IDD principles/processes
<b>Inputs:</b> <ul style="list-style-type: none"><li>• Preliminary Market/Product Plan (from Step 4)</li><li>• Organization Charts</li><li>• Resource skills availability/capability</li></ul>	<b>Work Activities:</b> <pre>graph LR; A[Establish Team Structure] --&gt; B[Finalize Membership]; B --&gt; C[Charter &amp; launch Management Team]; C --&gt; D[Develop Work Flow Transition Plan]; E[Charter &amp; launch Proj. Leadership Team] --&gt; F[Establish Process Steps 7 - 11]; F --&gt; G[Prepare &amp; Execute Training Plans]; G --&gt; H[Conduct VPRA]; H --&gt; I[Assess Team Commitment]</pre>	<b>Outputs:</b> <ul style="list-style-type: none"><li>• Charter(s)</li><li>• Partnership Agreement(s)</li><li>• Team Organization<ul style="list-style-type: none"><li>- Membership</li><li>- Roles &amp; Resp.</li></ul></li><li>- Mode of Operation<ul style="list-style-type: none"><li>- Reporting</li></ul></li><li>• Communications Plan</li><li>• Training &amp; Development Plans<ul style="list-style-type: none"><li>• Update to Risk Reduction Plan</li></ul></li></ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"><li>• Clear Investment Decision</li><li>• Project Manager selection criteria</li><li>• Project Management discipline &amp; support</li><li>• Process discipline/maturity</li></ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"><li>• Team Management Practices (IDD Modules 4 to 10)</li><li>• Coordinating Activities Workbook (Activities 43 to 56)</li></ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"><li>• Team Handbook</li><li>• QFD</li><li>• Communications System Planning</li><li>• VPRA ?</li></ul>

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### Process Guide for Road Map Step - 7

#### STEP: #7 - Partition Customer Rqmts. into Critical Solution Characteristics

<b>Begins With:</b> Chartered Business Team & Acceptance of QFD	<b>Purpose:</b> To ensure that the Business Team stays focused on Customer requirements and working on the right priorities.	<b>Ends With:</b> Commitment of QFD process discipline
<b>Inputs:</b> <ul style="list-style-type: none"> <li>• List of critical customer requirements, maps to needs and competitive assessments</li> <li>• Blank QFD charts</li> </ul> <p><i>Quality Function Deployment</i></p>	<b>Work Activities:</b> <pre> graph LR     A[Conduct Intro to QFD] --&gt; B[Develop Major Product/Service Characteristics]     B --&gt; C[Assign ownership and follow up for House One of QFD]     style A fill:#fff,stroke:#000,stroke-width:1px     style B fill:#fff,stroke:#000,stroke-width:1px     style C fill:#fff,stroke:#000,stroke-width:1px     style A fill:#fff,stroke:#000,stroke-width:1px     style B fill:#fff,stroke:#000,stroke-width:1px     style C fill:#fff,stroke:#000,stroke-width:1px     A --- B     B --- C     %% Delegation Note     subgraph Note [ ]         %% Note content     end     %% Note connection     Note --- A     Note --- B     %% Note connection     </pre> <p>work may be delegated to a Peer Team</p>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>• House One of QFD &amp; supporting rationale</li> <li>• Maintenance strategy &amp; plan</li> <li>• Communications Plan Update (for changes to QFD)</li> <li>• Updated Risk Reduction Plan</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>• Process discipline &amp; maturity level</li> <li>• Multi-functional teaming</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>• Project Deployment using QFD (IDD Module 12), or ASI manuals</li> <li>• Coordinating Activities Workbook (Activities 57 to 59)</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>• QFD Software</li> <li>• Risk Reduction Planning</li> <li>• Communications System Planning</li> </ul>

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## Process Guide for Road Map Step - 8

### STEP: #8 - Evaluate and Select Customer Value Concept

<b>Begins With:</b> Common understanding of & relationships with major product characteristics	<b>Purpose:</b> To force the Team to consider alternate solutions and synthesize/ select the best option.	<b>Ends With:</b> Consensus on selection criteria and rationale
<p><b>Inputs:</b></p> <ul style="list-style-type: none"> <li>• House One of QFD</li> <li>• Technology/Architectural Assessments (From Intro Module)</li> <li>• Benchmark Evaluations</li> <li>• Competitive Analysis</li> <li>• Blank PUGH Concept Charts</li> </ul>	<p><b>Work Activities:</b></p> <pre> graph LR     A[Conduct Intro to PUGH Concept Selection] --&gt; B[Develop Alternate Solution Concepts]     B --&gt; C[Select Customer Value Concept]     C -- feedback --&gt; B     C --&gt; D[Conduct Review with Business Team]   </pre> <p>work may be assigned to multiple Peer Teams</p>	<p><b>Outputs:</b></p> <ul style="list-style-type: none"> <li>• Description of Alternate Concepts</li> <li>• Selection rationale and criteria</li> <li>• Updates to House One of QFD</li> </ul>
<p><b>Organizational Enablers:</b></p> <ul style="list-style-type: none"> <li>• Involvement of key “downstream” functions in the brainstorming and selection activities</li> </ul>	<p><b>Best Practice Enablers:</b></p> <ul style="list-style-type: none"> <li>• Project Deployment using QFD (IDD Module 12) or ASI Manuals</li> <li>• Coordinating Activities Workbook (Activities 60 to 62)</li> </ul>	<p><b>Tools Enablers:</b></p> <ul style="list-style-type: none"> <li>• PUGH Concept Selection</li> <li>• Design for “X” techniques</li> <li>• Priority Criteria Decision List</li> </ul>

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## Process Guide for Road Map Step - 9

### STEP: #9 - Integrate Solution Elements

<b>Begins With:</b> Approval of Concept by Management Team	<b>Purpose:</b> To ensure integration of the product characteristics & concept with a total solution & the project / process planning activities.	<b>Ends With:</b> Approval of Specification (with exceptions) by Business Team
<b>Inputs:</b> <ul style="list-style-type: none"> <li>House One of QFD</li> <li>Selected Concept Description</li> <li>Blank QFD Charts</li> </ul>	<b>Work Activities:</b> <pre> graph LR     A[Determine Major Solution Components] --&gt; B[Assign Ownership &amp; Follow up for House Two of QFD]     B --&gt; C[Determine Key Tasks to Develop Components]     C --&gt; D[Assign Ownership &amp; Follow up for House Three of QFD]     style A fill:#ffffcc     style B fill:#ffffcc     style C fill:#ffffcc     style D fill:#ffffcc     B --- E[work may be assigned to Peer Team]     E --- A     </pre>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>Preliminary Solution Specifications</li> <li>Houses Two &amp; Three of QFD &amp; supporting documentation</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>Project Management Discipline</li> <li>Process Discipline</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>Project Deployment using QFD (IDD Module 12) or ASI Manuals</li> <li>Coordinating Activities Workbook (Activities 63 to 66)</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>QFD Software</li> <li>Common Building Blocks</li> <li>Application Ready Technology</li> </ul>

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# Process Guide for Road Map Step - 10

### STEP: #10 - Structure and Mobilize Critical Resources/Assets

<b>Begins With:</b> Stable & acceptable Solution Specifications	<b>Purpose:</b> To develop a high integrity and fully integrated project plan.	<b>Ends With:</b> Stable & acceptable Project Plan (with exceptions)
<b>Inputs:</b> <ul style="list-style-type: none"><li>• Preliminary Solution Specifications</li><li>• Houses Two and Three of QFD</li><li>• Blank QFD charts</li></ul>	<b>Work Activities:</b> <pre>graph LR; A[Determine Critical Resources/ Assets] --&gt; B[Assign Ownership &amp; Follow up for House Four of QFD]; B --&gt; C[Structure Implementation Teams]; C --&gt; D[Develop Task Mgm't Plan]; D --&gt; E[Develop Prelim. Project Control Plan]; E --&gt; F[Develop Risk Mgm't Plan];</pre> <p>work may be assigned to a Peer Team</p>	<b>Outputs:</b> <ul style="list-style-type: none"><li>• Preliminary Project Plan<ul style="list-style-type: none"><li>- Task Management</li><li>- Risk Management</li><li>- Project Monitoring</li><li>- Project Budget</li></ul></li></ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"><li>• Project Management expertise</li><li>• Collaboration &amp; involvement of key functions</li><li>• Common project metrics</li></ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"><li>• Project/Process Planning (IDD Modules 12 to 18)<ul style="list-style-type: none"><li>• Coordinating Activities Workbook (Activities 67 to 72)</li></ul></li></ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"><li>• Project scheduling, resourcing, and tracking software</li><li>• Project budgeting software</li></ul>

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## Process Guide for Road Map Step - 11

### STEP: #11 - Planning for Life-Cycle Management

<b>Begins With:</b>	<b>Purpose:</b>	<b>Ends With:</b>
Approval of Preliminary Project Schedule/Budget	To develop a total solution that optimizes the chances for sustained success.	Fully Defined Solution & Customer Commitment
<b>Inputs:</b> <ul style="list-style-type: none"> <li>• Preliminary Project Plan           <ul style="list-style-type: none"> <li>• Existing Employee Appraisal System</li> </ul> </li> <li>• Outbound Marketing Business Processes</li> </ul>	<b>Work Activities:</b> <p>Core Team:</p> <pre> graph LR     A[Develop Project Reward &amp; Recognition Strategy] --&gt; B[Develop Process to Capture Lessons Learned]     B --&gt; C[Conduct Major Project Review]   </pre> <p>Peer Team(s):</p> <pre> graph TD     subgraph PeerTeam [Peer Team(s)]         D[Develop Preliminary Deployment Plan]     end     subgraph CoreTeam [Core Team]         A[Develop Project Reward &amp; Recognition Strategy]         B[Develop Process to Capture Lessons Learned]         C[Conduct Major Project Review]         D -- "Project Plan" --&gt; E[Verify Plans with Target Customers]         E -- "Solution Specs" --&gt; B     end   </pre>	<b>Outputs:</b> <ul style="list-style-type: none"> <li>• Integrated Project Plan:           <ul style="list-style-type: none"> <li>- Solution Specs</li> <li>- Task Management</li> <li>- Risk Management</li> <li>- Project Control</li> <li>- Preliminary Deployment Plan</li> </ul> </li> <li>• Customer Acceptance</li> </ul>
<b>Organizational Enablers:</b> <ul style="list-style-type: none"> <li>• Common values, goals, incentives, and measurements</li> <li>• Full investment commitment</li> <li>• Involvement of out bound marketing</li> </ul>	<b>Best Practice Enablers:</b> <ul style="list-style-type: none"> <li>• Design for “X” practices</li> <li>• Team based performance system</li> <li>• Coordinating Activities Workbook (Activities 73 to 77)</li> </ul>	<b>Tools Enablers:</b> <ul style="list-style-type: none"> <li>• Best practice network and data base</li> <li>• Team MFA system</li> <li>• Out - Bounds - Review</li> </ul>