

1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						
43						
44						
45						
46						
47						
48						
49						
50						
51						
52						
53						
54						
55						
56						
57						
58						
59						
60						
61						
62						
63						
64						
65						
66						
67						
68						
69						
70						
71						
72						
73						
74						
75						
76						
77						
78						
79						
80						
81						
82						
83						
84						
85						
86						
87						
88						
89						
90						
91						
92						
93						
94						
95						
96						
97						
98						
99						
100						
101						
102						
103						
104						
105						
106						
107						
108						
109						
110						
111						
112						
113						
114						
115						
116						
117						
118						
119						
120						
121						
122						
123						
124						
125						
126						
127						
128						
129						
130						
131						
132						
133						
134						
135						
136						
137						
138						
139						
140						
141						
142						
143						
144						
145						
146						
147						
148						
149						
150						
151						
152						
153						
154						
155						
156						
157						
158						
159						
160						
161						
162						
163						
164						
165						
166						
167						
168						
169						
170						
171						
172						
173						
174						
175						
176						
177						
178						
179						
180						
181						
182						
183						
184						
185						
186						
187						
188						
189						
190						
191						
192						
193						
194						
195						
196						
197						
198						
199						
200						
201						
202						
203						
204						
205						
206						
207						
208						
209						
210						
211						
212						
213						
214						
215						
216						
217						
218						
219						
220						
221						
222						
223						
224						
225						
226						
227						
228						
229						
230						
231						
232						
233						
234						
235						
236						
237						
238						
239						
240						
241						
242						
243						
244						
245						
246						
247						
248						
249						
250						
251						
252						
253						
254						
255						
256						
257						
258						
259						
260						
261						
262						
263						
264						
265						
266						
267						
268						
269						
270						
271						
272						
273						
274						
275						
276						
277						
278						
279						
280						
281						
282						
283						
284						
285						
286						
287						
288						
289						
290						
291						
292						
293						
294						
295						
296						
297						
298						
299						
300						
301						
302						
303						
304						
305						
306						
307						
308						
309						
310						
311						
312						
313						
314						
315						
316						
317						
318						
319						
320						
321						
322						
323						
324						
325						
326						
327						
328						
329						
330						
331						
332						
333						
334						
335						
336						
337						
338						
339						
340</td						

INM Value Creation Process

Implementation Document

Goals, Decisions, Principle Questions, Deliverables

Table of Contents

• About the Process	3
• Entering the Process	6
• Business Opportunity Phase	7
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Program Launch Phase	11
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Initial Requirements Phase	15
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Alpha Phase	19
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Beta Phase	23
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• GA Phase	27
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Enhancements Phase	30
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• End of Product Phase	33
– Goals, Decisions, Participants	
– Questions	
– Deliverables	
• Glossary	35

About the Value Creation Process

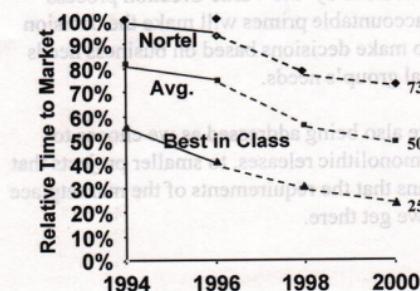
The Value Creation Process (VCP) is a key business process which defines how INM identifies, defines, develops and delivers product to our customers. The VCP was designed to respond to the following market pressures:

- competitors who use rapid time to market delivery processes
- shorter windows of market opportunity
- meeting customer defined product quality
- fast paced market growth

Why does Nortel need to improve time to market performance?

Time to Market Performance & Projections

(Major Projects)



Adapted from Copyright 1998 Nortel and PRTM 14971

This chart demonstrates Nortel's TTM relative to industry and best in class standards. The dotted lines are planned improvements. Highlights of the 1996 results show that:

- Nortel is making improvements in TTM, but still lags best in class by 2.5x
- Best in class companies plan to improve TTM faster than Nortel (gap will grow to 3x by 2000)

How does the Value Creation Process address market pressures ?

The new value creation process takes becoming "customer centric" to heart. "Being **Customer-Centric** is about delivering: **what** the customer needs, **when** the customer needs it, at a **price** which will make the customer's business successful, with the **reliability and quality** the customer needs...."

The customer is involved in the project as soon as possible and stays involved as we develop the product. Being close to the customer will help us to solve our customer's problems as efficiently as possible.

Early customer engagement is addressed by working with the customer to develop the initial requirements and by introducing an Alpha. Through Alpha we discover the value of our products to the market before we are committed.

The need for single accountable primes is addressed by the Value Creation process and the new organization structure. Single accountable primes will make the decision making process flow faster and help to us to make decisions based on business needs and project needs rather than on a functional group's needs.

The requirements of the short/short world are also being addressed as we choose to change the size of our projects from large, monolithic releases, to smaller projects that can reach the marketplace sooner. This means that the requirements of the marketplace are less likely to have changed by the time we get there.

Principles of the Value Creation Process

Does

Does Not

- Encourage teamwork and collaboration
 - Provide a customer and business focus
 - Support time to market
 - Manage risk
 - Demonstrate clear ownership and accountability
- Enable quality

- Contain detailed process descriptions
- Define specific methodologies
- Eliminate need for good judgement
- Limit flexibility

Key Points for all Projects

This document is not intended to be prescriptive but to provide guidance to INM project teams. The following key points will assist your understanding of the VCP.

Portfolio Managers

The Portfolio Managers are accountable for each product in their portfolio from end to end. They are responsible for the project business cases and provide business direction to the project teams.

Project Leaders

Project Leaders are accountable for the Time to Market and all execution aspects of their projects from pre-program launch until general availability. These activities include schedules, budgets, planning, lead customer engagements, sustaining plans etc. The Project leader is the cross-functional team leader of the project team.

Project Teams

Project teams are made up of:

- designers
- verifiers
- documenters
- customer service representatives
- systems engineers
- product marketing
- lead account team representative

Every Project

- must determine which deliverables and questions apply to their project
- must involve Product marketing and Account marketing throughout the life of their project
- must facilitate customer interaction
- must have achieving Time to Market commitments

Entering the Value Creation Process

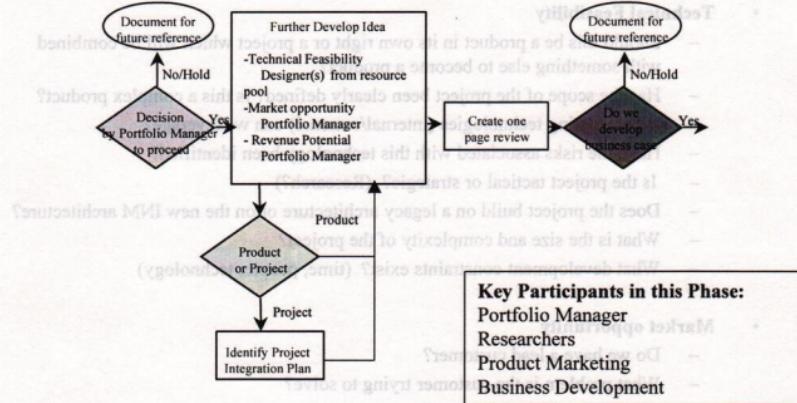
In order to get things started in the Value Creation process you need an opportunity and a Portfolio Manager.

Opportunities come from INM's strategic and operating plans or may be a result of unexpected events or discoveries with customers. Opportunities may develop into new products or new releases of existing products. Anyone can identify opportunities to the Portfolio Managers.

The Portfolio Managers pursue significant opportunities by beginning the Business Opportunity Phase. During this phase the Portfolio Manager may acquire limited resources to research technical feasibility while the Portfolio Manager works with the product marketing and business development to research the business feasibility. These individuals work to answer the question "Is there sufficient market opportunity to warrant business case development? This is the first decision point in the VC process.

This document captures the key participants, deliverables and principles for each phase and decision point as a project flows through the Value Creation process.

Business Opportunity Development Phase Decision



- Inputs to this phase:**
 - Opportunity identified
- Goals**
 - To understand at a minimum:
 - market size and potential revenue opportunity
 - high level technical feasibility
 - rough cost estimates (development)
 - Understand customer value
 - Understand if intent is to generate INM revenues or leverage Nortel NE sales
- Decision**
 - Decision Timing:** Before proceeding to business case development (1-4 weeks)
 - Decision Maker:** Portfolio Manager
 - Decision Influencers:** Product Marketing, Business Development
 - Decision to be Made:** Is there sufficient market opportunity to warrant business case development?
- Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics

Business Opportunity Development Questions

• Technical Feasibility

- Should this be a product in its own right or a project which will be combined with something else to become a product?
- Has the scope of the project been clearly defined? Is this a complex product?
- What existing technologies (internal/external) can we leverage?
- Have the risks associated with this technology been identified?
- Is the project tactical or strategic? (Research?)
- Does the project build on a legacy architecture or on the new INM architecture?
- What is the size and complexity of the project?
- What development constraints exist? (time, people, technology)

• Market opportunity

- Do we have a lead customer?
- What problem is the customer trying to solve?
- Do we understand customer requirements from a customer perspective?
- Does this fit with the INM overall business direction?
- What is the product value proposition? (position in marketplace)
- What is the window of the market opportunity?
- What is the market size for this opportunity?
- What is the target market segment?
- Do we understand our competitive differentiators?
- What are the risks?

• Preliminary investment analysis

- What is the revenue opportunity?
- What is the cost estimate (development)?
- What is the high level projection of the resources required to complete the project?

Team includes:
Portfolio Manager
Researchers
Product Marketing
Business Development

Business Opportunity Development cont.

- **Decision Maker's Questions**

- Is the idea technically feasible?
- What is the market opportunity?
- What is the size of the investment and does this provide an acceptable ROI?
- What is the future evolution of the product?
- What skill sets are required and do we have these in-house?
- What is the benefit of the investment?
- How does this solution fit into the INM's strategic/operating plans?

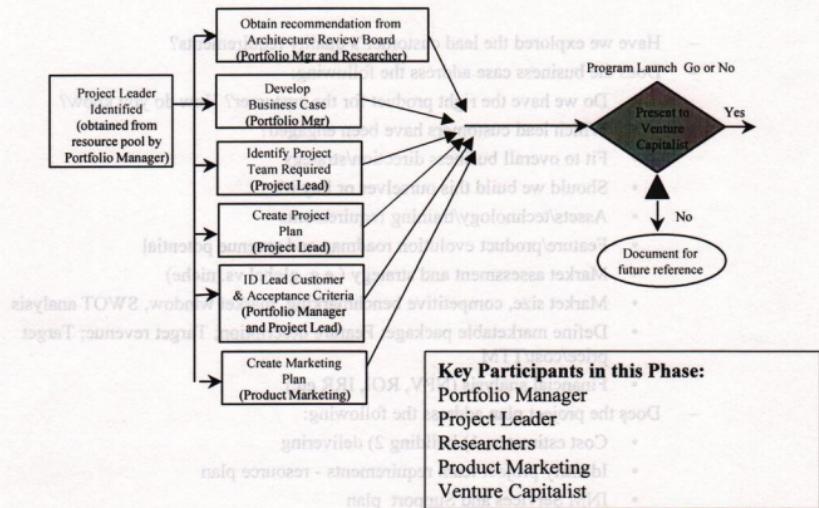
Business Opportunity Development

Deliverables

Deliverables

- Preliminary view of:
 - size of market opportunity
 - technical feasibility assessment
 - size of the investment
- Project Leader selection

Program Launch Phase



- **Inputs to this phase:**
 - Preliminary view of project
- **Goals**
 - The objective of the Program Launch is to justify the total value of the project, in order to obtain funds and approval from the Venture Capitalists to launch and deliver Alpha.
- **Decision**
 - **Decision Timing:** At end of presentation to Venture Capitalist
 - **Decision Maker:** Venture Capitalist
 - **Decision Influencers:** Portfolio Manager, Project Leader, Product Marketing
 - **Decision to be Made:** Do we move to Program Launch or place this opportunity on hold?
- **Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics

Program Launch Questions

- Have we explored the lead customer's quality requirements?
- Does the business case address the following:
 - Do we have the right product for the customer? How do you know?
 - Which lead customers have been engaged?
 - Fit to overall business direction/strategy
 - Should we build this ourselves or buy it?
 - Assets/technology/training requirements
 - Feature/product evolution roadmap and revenue potential
 - Market assessment and strategy (e.g. global vs. niche)
 - Market size, competitive benchmarking, market window, SWOT analysis
 - Define marketable package; Feature description; Target revenue; Target price/cost/TTM
 - Financial analysis (NPV, ROI, IRR etc)
- Does the project plan address the following:
 - Cost estimates; 1) building 2) delivering
 - Identify project team requirements - resource plan
 - INM Services and Support plan
- Marketing plan
 - activity and resource plan to launch the product
- Have we identified critical dependencies?
- Do we have a Risk assessment (Technological, TTM, Financial) and contingency plan?
- Have you assessed the technical feasibility of this idea with the Architecture Review Board?
- Do you have an allocated owner in Services and Marketing? Do we have an agreement with account marketing on how to handle customer engagements?
- Do we have channels identified through account marketing?

Team includes:
Portfolio Manager
Project Leader
Researchers
Product Marketing

Program Launch Questions cont.

- **Decision Maker Questions**

- Is the project a good fit for INM's strategic direction? Should we build this ourselves or buy it?
- Does the business case justify committing funds to this project? (ROI vs. market penetration for example)
- Where does the priority of this project fit in terms of a) other internal VCU projects b) across VCU projects?
- Is this the correct timing for launching this project?
- What are the implications of not doing this project?
- Do we have a marketing strategy to deliver success?
- Can we meet the window of opportunity?
- If this project is part of a major product release, what is your integration plan?
- How have you addressed any concerns raised by the Architecture Review Board?
- Do we understand and accept the project risks?

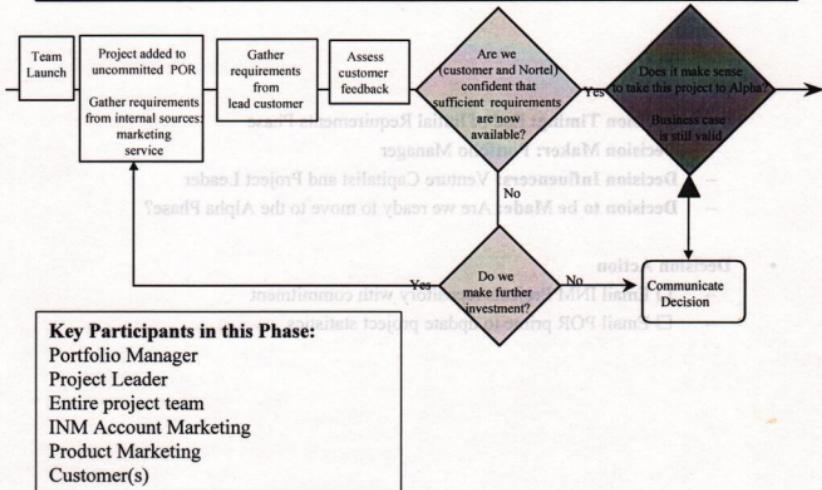
Program Launch Deliverables

Deliverables

- Business Case
- Preliminary Project plan
 - Risk Analysis ("top-ten risks") & management plan
- Preliminary Marketing Plan
- Completed Architecture Review Board template
- Input from Architecture Review Board
- Change POR status to launch

How does your application align with the Application Review
Criteria? Do we meet the minimum requirements?

Initial Detailed Requirements Phase- Goals/Objectives & Decision

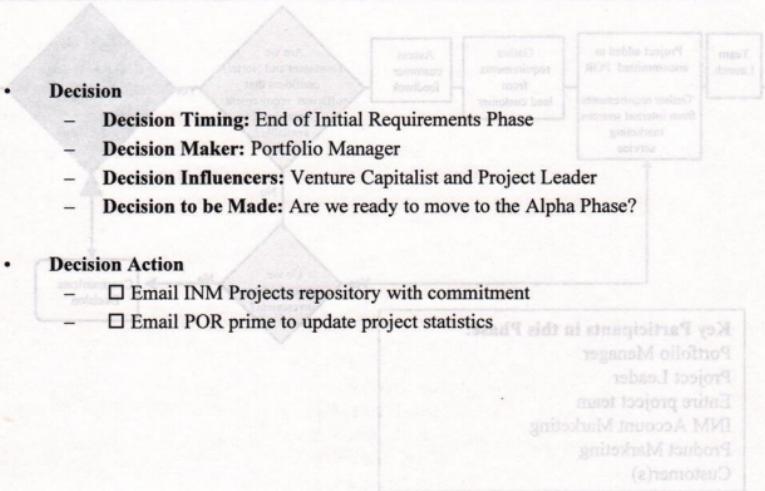


- Inputs to this phase:**
 - Business Case, Competitive Analysis, High-level customer requirements
- Goals**

The objective of the Initial Requirements Phase is to:

 - define an *initial* set of detailed requirements that will meet the customer's need.
 - Translate the customer requirements into a feature specification and should be written from the implementers perspective
 - The initial requirements should ensure that the technical feasibility has been confirmed.
 - The intent is to be able to share the initial requirements with the identified alpha customer(s) to ensure that we are on the right track before starting detailed design and implementation
 - Screen mock ups, prototypes etc. would be useful tools used to define the initial requirements

Initial Detailed Requirements Phase-Goals/Objectives & Decision cont.



Initial Detailed Requirements Phase-Questions

- Have requirements been evaluated against customer needs?
- Have requirements been evaluated against business needs? (i.e. efficiency/effectiveness)
- Are the alpha customer(s) satisfied with the requirements?
- Are all required (non-human) development resources in place to proceed to alpha?
- Have cross component product consistency, redundancy and commonalities been considered? (e.g. User Interface Guidelines, Naming, Terminology etc.)
- Does the project plan meet the target market window requirements?
- Have project dependencies been addressed?
- Have CSRs from previous releases (if applicable) of this product been addressed?
- Have requirements for supportability been included?
- Have requirements for installability been included?
- Have upgrade requirements been included?
- Have packaging requirements been included?
- Have 3rd party component requirements been included?
- Have performance and capacity requirements been included?
- **Decision Maker Questions**
 - Does the business case still prove in?
 - Based on requirements churn, are assigned resources (human and non-human) still valid?
 - Is next version of overall project plan proceeding?
 - Is there an account marketing plan?
 - Are specific plans for Alpha customer(s) engagements in place?
 - Is the product marketing plan in place?
 - Are all the risks understood and acceptable?

Team includes:
Project Leader
All project team members

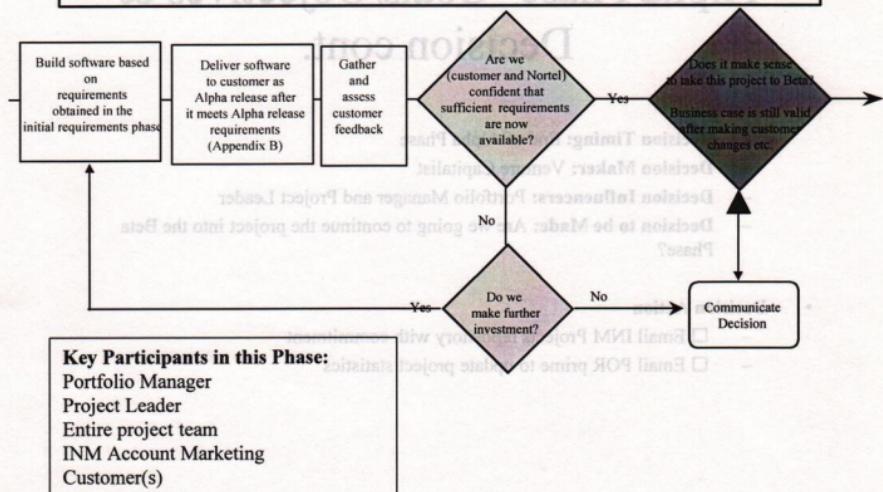
Initial Detailed Requirements Phase- Deliverables

Deliverables

- Clear Statement of Requirements in customer understandable terms
- Updated business case
- Firm Project Plan to get to end of alpha
 - implementer resources
 - customer interaction plan to end of alpha
 - alpha documentation plan (eg. any required release notes for alpha release)
 - non-human resource plan (H/W, third party software etc.)
 - Detailed Services Plan to support alpha
- Draft complete project plan
 - design&verification
 - documentation
 - services
 - training
- Product marketing plan
 - including preparing channel to market
- Risk Analysis ("top-ten risks") & management plan
- Complete list of Alpha Success Criteria
- Complete list of Alpha Dependencies (eg. other INM components, Framework, 3rd Party components, Network Elements etc.)

All business areas will provide:
Business Plan
Project Plan
Team members

Alpha Phase -Goals/Objectives & Decision



- Inputs to this phase:**
 - Business Case, Completed Detailed Requirements
- Goals**

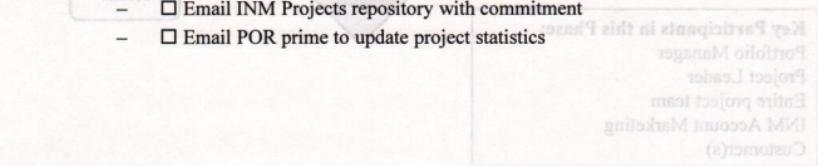
The objective of the Alpha Phase is:

 - To deliver an incomplete executable version of the product :
 - To obtain feedback on the feature content and usability to effectively complete design/implementation
 - To obtain feedback from customer on operation of the product
 - Alpha version should contain minimum functionality (minimum cost) to obtain optimum customer feedback.
 - Upon completion of the Alpha phase, the project team should be prepared to make modifications to the product
 - Upon completion of the Alpha phase, the management team should have the required information to make “go/no-go” decision on the project

Alpha Phase -Goals/Objectives & Decision cont.

- **Decision**
 - **Decision Timing:** End of Alpha Phase
 - **Decision Maker:** Venture Capitalist
 - **Decision Influencers:** Portfolio Manager and Project Leader
 - **Decision to be Made:** Are we going to continue the project into the Beta Phase?

- **Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics



Objectives

Alpha Phase Objectives

To complete all of the Alpha Phase tasks.

To gather feedback on the current status of the project.

To gain feedback from customers on the direction of the project.

Alpha phase should contain minimum functionality (minimum core) to gain optimum customer feedback.

Upon completion of the Alpha phase, the project team should be prepared to make modifications to the project.

Upon completion of the Alpha phase, the management team should have the leadership information to make "go-on-go" decisions on the project.

Goals

The objective of the Alpha Phase is:

To complete an incomplete execution of the project.

To gain feedback on the current status of the project.

To gain feedback from customers on the direction of the project.

Alpha phase should contain minimum functionality (minimum core) to gain optimum customer feedback.

Upon completion of the Alpha phase, the project team should be prepared to make modifications to the project.

Upon completion of the Alpha phase, the management team should have the leadership information to make "go-on-go" decisions on the project.

Alpha Phase Questions

- Have all planned Alpha activities been completed?
 - Have the pre-defined alpha success criteria been met?
 - Is the customer satisfied with the intent of the feature(s) (content, looks and behavior)?
 - Has the customer's input been collected on usability of feature(s)?
 - Is the customer satisfied with documentation strategy (types of information, layout, etc.)?
 - not necessarily implemented in the alpha product?
 - Has the alpha product been evaluated for general use (eg. not specific to alpha customer(s))?
 - Are the dependencies required to achieve Beta on-track?
 - Is the customer satisfied with the packaging strategy?
 - Is the team confident they can meet the schedule commitments?
- **Decision Maker Questions**
- Does the business case still prove in?
 - Does the priority of this project justify continuing the funding?
 - Are we prepared to change the status of this project on our POR to "committed"?
 - Is the project plan up to date and on schedule?
 - Is the projected GA date understood and acceptable?
 - Are the risks understood and acceptable?
 - Are the necessary resources available to reach GA?
 - Is the execution of the product marketing plan on track?
 - Is the execution of the account marketing plan on track?

Team includes:
Project Leader
All project team members

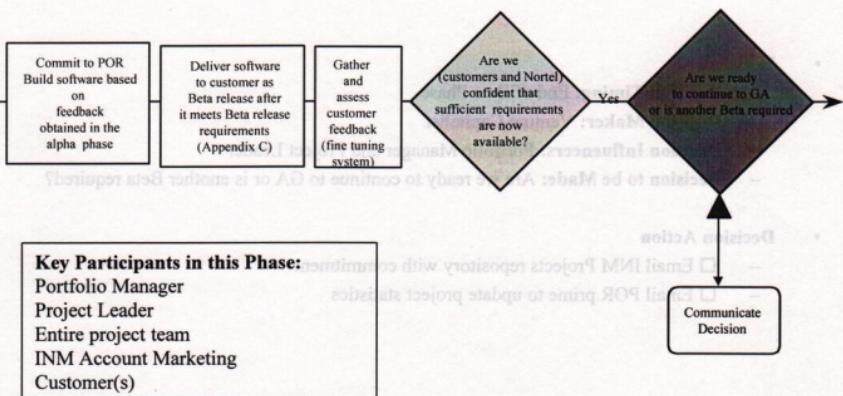
Alpha Phase-Deliverables

- **Deliverables**

- Results of Alpha Trial
- Updated business case
- Firm Project Plan to get to GA
 - implementer resources
 - customer interaction plan for Beta
 - beta documentation plan
 - non-human resource plan (H/W etc.)
 - Detailed Services Plan to support beta
 - Product marketing plan
- Updated Risk Analysis ("top-ten risks") & management plan
- Updated Statement of Requirement
- A refined customer value proposition
- Complete list of Beta Success Criteria
- Complete list of Beta Dependencies (eg. other INM components, Framework, 3rd Party components etc.)
- Evaluation against success criteria complete and plan to address deficiencies in place
- Draft internal & external marketing collateral (brochures, sales material etc.)

All project team members
Project Leader
Team Leader

Beta phase - Goals/Objectives & Decision



- Inputs to this phase:**
 - Alpha Phase Feedback
- Goals**
 - To deliver a complete version of the product that includes documentation, installation procedures etc. to:
 - Receive feedback on complete functional version of product
 - Receive customer satisfaction feedback on the “customer product experience” when the product is operated in a customer environment (includes services)
 - Get feedback on robustness/performance (eg. engineering, installation, interaction with other components etc.)
 - To identify any work items/changes required to achieve a smooth volume ramp
 - To predict the customer satisfaction with the final product

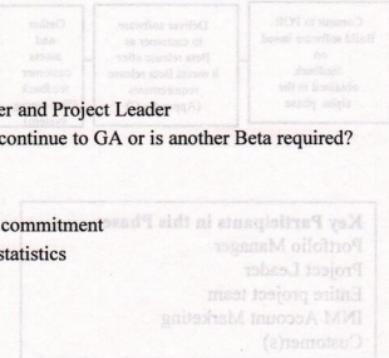
Beta phase - Goals/Objectives & Decision Cont.

- **Decision**
 - **Decision Timing:** End of Beta Phase
 - **Decision Maker:** Venture Capitalist
 - **Decision Influencers:** Portfolio Manager and Project Leader
 - **Decision to be Made:** Are we ready to continue to GA or is another Beta required?

- **Decision Action**

- Email INM Projects repository with commitment
- Email POR prime to update project statistics

Decision
Action(s)



To deliver a complete version of the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

To receive feedback on the budget for review, presentation, discussion etc.

Beta Phase Questions

- Is the customer satisfied with the complete product (eg. functionality, robustness, documentation services etc.)?
 - Have all planned Beta activities been completed?
 - Have the pre-defined beta success criteria been met?
 - Are the dependencies required to achieve GA on-track?
 - Are cross LOB, cross VCU, cross product dependencies/rollout aligned to ensure customer value?
 - Have you informed the customer about what you intend to do with their feedback (plans to fix now, plans to change in future release, no plans to address)?
 - Does the project meet all of its objectives?
 - Has preparation been initiated to prepare for manufacturing at GA?
 - Has the training plan for supporting roles (services, marketing, channels, etc.) been developed and communicated?
-
- **Decision Maker Questions**
 - Are we prepared to make it publicly known we are launching this product?
 - change the status of this project on our POR to "commercially available"
 - If yes, is the product "generally available"?
 - Is the project plan up to date and on schedule?
 - Is the projected GA date understood and acceptable?
 - Are the risks understood and acceptable
 - Are the necessary resources available to reach GA?
 - Has the product marketing plan been launched?
 - Is the execution of the account marketing plan on track?
 - Does the business case still prove in?
 - Does the priority of this project justify continuing the funding?
 - Is the product pricing finalized?

Team includes:
Project Leader
All project team members

Beta Phase Objectives

Beta Phase - Deliverables

Deliverables:

- Results of Beta Trial
- Updated business case
- Detailed Plan to GA updated
- Updated Risk Analysis ("top-ten risks") & management plan
- Full functional product complete & delivered for the Beta Trial(s)
- All documentation, installation procedures and services are in place
- Evaluation against success criteria complete and plan to address deficiencies in place
- GA announcement complete
- Complete list of GA Success Criteria
- Release Notes

At the beginning of what it hopefully known as the marketing life cycle

"square the area of the project on the front page"

"Has it the required resources?"

"Is the budget plan up to date and no surprises?"

"Is the location GA able to implement and responsible?"

"Are the team members available to support GA?"

"Has the budgeting meeting been performed?"

"Is the execution of the second marketing plan on track?"

"Does the process case still make sense?"

"Does the budget of this project justify continuing the planning?"

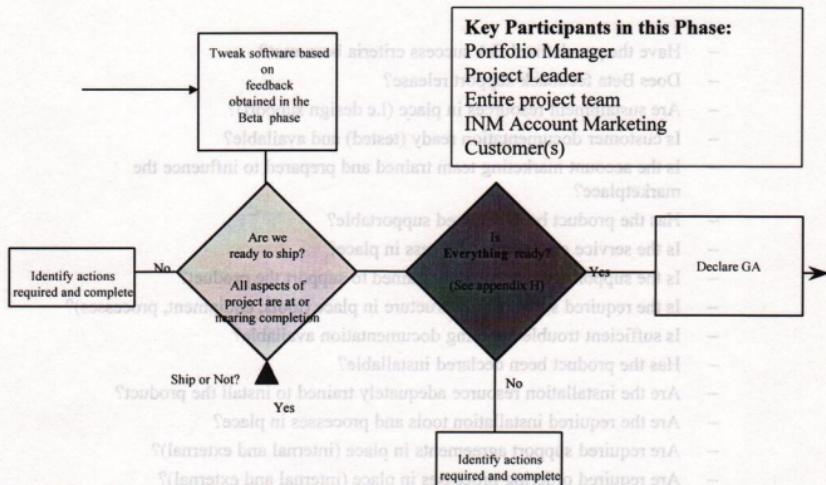
"Is the budget public knowledge?"

Team members

Project Leader

All project team members

General Availability -Goals/Objectives & Decision



- Inputs to this phase:**
 - Beta Feedback, Plans to address Beta Feedback
- Goals**
 - The objective of the General Availability milestone is to establish if the product is ready for mass deployment.
 - To transition team members to next project
 - To execute field support and sustaining plan
- Decision**
 - Decision Timing:** At or after Beta Phase
 - Decision Maker:** Venture Capitalist
 - Decision Influencers:** Portfolio Manager and Project Leader
 - Decision to be Made:** Are we ready to declare GA?
- Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics

General Availability Questions

- Have the pre-defined GA success criteria been met?
- Does Beta feedback support release?
- Are sustainment resources in place (i.e design support)?
- Is customer documentation ready (tested) and available?
- Is the account marketing team trained and prepared to influence the marketplace?
- Has the product been declared supportable?
- Is the service engagement process in place?
- Is the support team adequately trained to support the product?
- Is the required support infrastructure in place (tools, equipment, processes)?
- Is sufficient trouble-shooting documentation available?
- Has the product been declared installable?
- Are the installation resource adequately trained to install the product?
- Are the required installation tools and processes in place?
- Are required support agreements in place (internal and external)?
- Are required ordering processes in place (internal and external)?
- Is training ready?
- Are the wheels in motion to discontinue appropriate previous releases?
- Are we prepared to change the status of this project on our POR to "generally available"?
- Is the sustaining plan in place?
- Are the risks understood and acceptable?
- Where's the Party??

Team includes:

Project Leader
All project team members
Product Marketing
Account Marketing

General Availability Deliverables

- Updated business case
 - Completed Product
 - Product Sustaining Plan including maintenance releases in place
 - Project History Archived
 - Trouble shooting guide
 - ~~Release Notes~~
 - Plans for post project review in place

Post G/A -Goals/Objectives & Decision

Key Participants in this Phase:

Portfolio Manager
Sustaining team
Venture Capitalist or VCU Head
Services
Account marketing

- **Goals**
 - Support and advance the current release and obtain customer feedback
 - Review status of product defects (CSRs) vs. enhancements (feature requests) in customer requests
 - Monitor the business goals to provide insight for future releases and to determine how long to maintain this release
 - Assess performance against sales targets
 - Assess performance against service targets e.g. CSR responsiveness, web site, call centre
 - Assess product and services performance in marketplace and post G/A support (qualitative and quantitative)
 - Capture business opportunities enabled with this product
 - Trigger the implementation of related process improvements
 - Identify key learning's from business case development and forecasting (long-term)
- **Decision**
 - **Decision Timing:** as customer problems come in
 - **Decision Maker:** Portfolio Manager
 - **Decision Influencers:**
 - **Decision to be Made:** Need for a enhancement (CSR driven) vs. minor (feature driven) release prior to the next major release
- **Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics

Post G/A Questions

- **Current release**
 - Is there a need for a maintenance (CSR driven) vs minor (feature driven) release prior to the next major release?
 - What percentage of the installed base is affected by the problem?
 - Should the problem be addressed in the next release?
 - Is there a non-development solution to the problem (additional support, professional services, etc.)?
- **Business goals**
 - How successful are we in responding to customer requests?
 - Are we providing proper training and support?
 - What opportunities have we uncovered based on customer services activities?
 - How are we doing on revenues compared to forecasts?
 - How accurate was our business case?
 - How accurate were our design estimates?
 - Did we meet our project objectives?
 - Assessment of product performance
 - What is the action plan from customer feedback?
 - What are the CSR metrics for the project?

Post G/A Deliverables

- **Deliverables GA + 3 months**
 - Revenue status and projection compared to GA forecast
 - List of uncovered business opportunities
 - Project post mortem report and action plan/owners
 - Assessment of product performance
 - Customer Feedback metrics
 - CSR's metrics

What opportunities pose a threat or challenge based on external service availability
 How are we going to leverage our database of customers
 How scenarios will our pricing affect us
 How scenarios will our delivery requirements affect us
 Did we meet our project objectives?
 Assessment of project deliverables
 What is the cost of project delivery?
 What are the CSR metrics for the projects

End of Project -Goals/Objectives & Decision

Key Participants in this Phase:

Portfolio Manager

Sustaining team

Product Marketing

INM Account Marketing

VCU Head

- **Goals**
 - Ensure customers migrate to latest product release
 - minimize support cost
 - optimize resources
 - Ensure revenue opportunities flow into the new release
- **Decision**
 - **Decision Timing:** GA of the next release, or decision made during Post GA
 - **Decision Maker:** Portfolio manager
 - **Decision Influencers:**
 - **Decision to be Made:** When do we stop shipping the current release? When to stop field support?
- **Decision Action**
 - Email INM Projects repository with commitment
 - Email POR prime to update project statistics

End of Product Questions and Deliverables

Questions

- What is the final financial assessment of this project?
 - Have all customer concerns been addressed?
 - Are any related projects dependent on the product to be discontinued?
 - Are the potential risks of discontinuing the product acceptable?
 - Should the product be discontinued?

• Deliverables

- Information broadcast to all Nortel groups and customers
 - Assessment of business performance
 - Transition plan for migrating customers to latest release

Glossary

- **CSR**
 - Customer Service Report
 - the mechanism for tracking customer problems/requests
- **GA**
 - Generally Available
- **INM Projects repository**
 - a mechanism for tracking project history and status internally
- **installability**
 - the ease with which a product can be installed
- **POR**
 - Plan of Record
 - the Nortel mechanism for communicating the commercial status of projects
- **Project team**
 - The project team consists of the following functions:
 - designers
 - verifiers
 - documenters
 - customer service representatives
 - systems engineers
 - product marketing
 - lead account team representative
- **ROI**
 - Return on Investment
- **supportability**
 - the ease with which a product can be supported in the field

Continued ...

Glossary

- **Time to value**
 - what the customer needs, when the customer needs it, at a price which will make the customer's business successful, with the reliability and quality the customer needs
- **Value proposition**
 - the needs driving customer interest and their relative priority to the customer
- **Venture Capitalist**
 - is the person funding the project. There are two cases. In the first case, when the project was expected (is part of a VCU operating plan) and it does not have cross-VCU implications, the venture capitalist is the VCU head. In all other cases (unexpected opportunities, projects that cross-VCU's) the venture capitalist becomes the INM Cabinet and the VCU Head can be considered one of the decision influencers.

Project

The case with major changes can be addressed in the field

Planned Launch 6/1/99

Activities identified are required for all new features and releases

Activities with a star * may be required only for new releases

As of:

MONTH	WEEK OF	PLANNING	Completion		Who	Completion Date
			Who	Date		
-10 MONTHS Aug-98	8/4	Business Opportunity Phase	VCU	10/2/98		
	8/11	Conduct market research (competitors, customers, technology, regulation)	Product Mktng	8/21/98		
	8/18					
	8/25	Complete market analysis	Product Mktng	8/26/98		
-9 MONTHS Sep-98	9/1	Draft feature concept	Product Mktng	10/5/98	Do packaging research (positioning, value, bundling, pricing)	Product Mktng 9/28/98
	9/8	Draft/Revise marketing plan	Product Mktng	1/15/99		
	9/15	* Business Case	VCU			
	9/22	# Program Launch	VCU		Draft packaging	Product Mktng 10/23/98
-8 MONTHS Oct-98	9/29	Pre-Alpha	VCU			
	10/6	Alpha Trial	VCU	10/16/98		
	10/13					
	10/20	Alpha Decision	VCU	12/4/98		
-7 MONTHS Nov-98	10/27	Update Business Case	VCU			
	11/3	Update marketing plan			Update packaging	Product Mktng
	11/10					
	11/17					
-6 MONTHS Dec-98	11/24					
	12/1					
	12/8	Pre-Beta	VCU	2/5/99		
	12/15					
-5 MONTHS Jan-99	12/22					
	12/29					
	1/5					
	1/12					
-4 MONTHS Feb-99	1/19					
	1/26					
	2/2					
	2/9	Beta Trial	VCU	2/19/99	Finalize packaging Create/revise price book	Product Mktng 4/9/99 Product Mktng 4/23/99
-3 MONTHS Mar-99	2/16	Beta Decision	VCU	3/19/99		
	2/23	Update Business Case	VCU			
	3/2	Update marketing plan	Product Mktng			
	3/9					
-2 MONTHS Apr-99	3/16					
	3/23					
	3/30					
	4/6					
-1 MONTH May-99	4/13					
	4/20					
	4/27					
	5/4					
**Ship Date:	5/11					
	5/18					
	5/25					
	Jun-1-99					
+1 MONTH Jul-99	6/8					
	6/15					
	6/22					
	6/29					
+2 MONTHS	7/6					
	7/13					
	7/20					
	7/27					
	8/3					

COLLATERAL	Completion		EVENTS	Completion		PROGRAMS
	Who	Date		Who	Date	
revise sales presentation	Product Marketing	2/26/99	Identify events (trade shows, user groups, conferences)	Product Marketing	12/18/98	Maintains customer characterization database
Revise feature sheet	Product Marketing	3/5/99	Arrange events	Product Marketing	1/22/99	Expands/maintains "Ideas Tracking System" (electronic suggestion box on the web)
Create/review PSI*	Product Marketing	3/26/98				Maintains competitor database
Draft Sales Q&A	Product Marketing	3/19/99				
Draft press release	Product Marketing	3/19/99				
Customer newsletter	Product Marketing	3/26/99				
Draft article	Product Marketing	4/23/99	Arrange analyst/press meeting	Product Marketing	4/2/99	Create/review sales training program
Send press release	Product Marketing	4/2/99	Meet press/analysts	Product Marketing	4/30/99	Plan to upgrade demo systems
Distribute collaterals	Product Marketing	4/16/99				Plan to upgrade simulations
Updates website	Product Marketing	4/9/99				Deliver sales training program
Customer newsletter	Product Marketing	4/30/99				
Journal coverage appears						
Draft testimonials	Product Marketing	7/30/99				Upgrade demo system
Place testimonials	Product Marketing	8/6/99				Upgrade simulations
						Conduct "win/loss" analysis