CVCM-IT Support Tiger Team for CS

Project Start

Week ending February 5, 2010

Contents

- IT ecosystem & agreements
- Inputs

IT ecosystem for CS business

Business

CS

GBP-aligned IT

| CVCM-IT (booking / ordering, SCM) | GPSS/BSOS (sales, quoting) | GPSS Perf Mgmt &Config |

Support Services

| GTRC (first-line support) | IT Global Ops (EiO metrics) | ITDS (remaining support tiers) |

Infrastructure Support Teams - Examples

| Platform Services | ADM | C&C IT (iFax support) |

Inputs needed

System Priorities
- **Critical systems** definition (business input)
- Current **EMAN priorities**
- Comparison of business priorities vs EMAN/IT definition

Agreements
- **Existing SLA** commitments/definitions (of any type, by any IT org) within CS/CVCM scope
- **Key business transactions**
- **Key time periods** if any (e.g., q-end) for each key business transaction and/or each key system
- Current support coverage

Monitoring and Metrics
- Current IT **reports** (any type) from IT (any org) **to CS business**
- Existing key IT **reports** within or **among IT organizations** supporting CS
- Degree/type of performance monitoring and trending
- Degree/type of case analysis for themes & trends + actions needed
- **EiO reports** for CVCM-IT, ITDS (CVCM scope); results compared to other groups within <client name deleted>

Processes
- Incident creation (phone, web, plus any other routes)
- Escalation means and processes (and who can escalate)
- Roles and processes on incident bridges
- GTRC engagement, FRED?
- Interaction among any of: ITDS, CVCM-IT, C&C IT, CS for CVCM cases
- **Process documentation**

Legend:
Expected to be revealed via interviews and input data
Expected as tangible documentation input
Likely requires development

Information sources

System Priorities	• **Critical systems** definition (business input) • Current **EMAN priorities** • Comparison of business priorities vs EMAN/IT definition	Parisa (with Dale) (EMAN)
Agreements	• **Existing SLA** commitments/definitions (of any type, by any IT org) within CS/CVCM scope • **Key business transactions** • **Key time periods** if any (e.g., q-end) for each key business transaction and/or each key system • Current support coverage	Steven, Bruce Parisa (with Dale) Parisa (with Dale) Steven
Monitoring and Metrics	• Current IT **reports** (any type) from IT (any org) **to CS business** • Existing key IT **reports** within or **among IT organizations** supporting CS • Degree/type of performance monitoring and trending • Degree/type of case analysis for themes & trends + actions needed • **EiO reports** for CVCM-IT, ITDS (CVCM scope); results compared to other groups within <client name deleted>	Steven, Dale, Meena Dale/Meena? (Intranet)
Processes	• Incident creation (phone, web, plus any other routes) • Escalation means and processes (and who can escalate) • Roles and processes on incident bridges • GTRC engagement, FRED? • Interaction among any of: ITDS, CVCM-IT, C&C IT, CS for CVCM cases • **Process documentation**	All Steven

Legend:
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Interviews

CS Business

- ✓ Parisa Naseralava
- ■ James Chow (CS Ops, Biz Ops Mgr)
- ■ Swina Sapkota
- ■ Patricia Sainz

Potentially:

- ■ Genio Vorghi (Mgr, CS Global Ops)
- ■ Rob Riddle (Mgr, CS)

GPSS

- ✓ Jeff Lawless (GPSS)
- ✓ Meerah Janardhana-Rajavel (Sys Perf and Config)
- ✓ Jamie Schafer (BSOS/CS Service Lead)
- ✓ Margaret Kelleher (BSOS/CS Service Mgr)

ITDS

- ✓ Steven Smith (ITDS spoc for CVCM-IT)
- ✓ Bruce Walthers (Service Mgr)
- ■ Zakir Hussein (Service Lead)
- ✓ Ajay Nanda (ITDS SM for GPSS scope)

CVCM-IT

- ✓ Dale Chapman
- ✓ Meenu Taneja
- ✓ Latha Krishna

Comms & Collaboration IT

- ✓ Carol Etheridge (iFax system owner)

Legend:	
✓	Complete
■	Planned

Not listed:	
GTRC	ADM
IT G-Ops (EiO)	Plat Svcs

Discussion areas

Organization	Contacts	Discussion Points
CS Business	Parisa Naseralava? James Chow? Dan? Genio? Rob R?	• Validation of Critical Systems • Identification/validation of targets • Overall IT engagement model, high-level agreements (eventually)
CS Business	Swina Sapkota Patricia Sainz	• Measurement & reporting of performance to targets
ITDS	Steven Smith Bruce Walthers Zakir Hussein	• Current support processes • Roles, boundaries, hand-offs • Measurement (eventually)
ITDS	George John? Gopal?	• Roles, boundaries, high-level agreements
GPSS	Jeff Lawless Margaret Kelleher Jamie Schaefer	• Boundaries, gaps, issues, history • Roles, hand-offs, future relationship • Shared/consistent success measurement
CVCM-IT	Meenu Taneja	• Measurement and reporting (ongoing)
C&C IT	Carol Etheridge	• Support structure and processes, roles • Targets, agreements (eventually)

Documents

- Process documents:
    - *<none identified or transmitted to date>*
- Agreements:
    - *<no documentation identified or transmitted to date>*
    - iFax: Only agreements are those standard to monitoring as a P1 application
- Measurements and reporting:
    - CVCM IT Critical Systems Availability Dashboard (draft)
    - IT Downtime summary (ITDS CVCM data)
    - EiO FY10 Metrics Targets
    - Case_Drilldown_File (EiO case data by Dir/VP)
    - Eight_Quarter_Drilldown (EiO case data by Dir/VP)
- Critical Systems:
    - P1/P2 Impact Analysis (PPT, from BSOS/CS analysis18 mos ago)
    - BSOS Critical App List (Excel)
    - CriticalSystems-DashBoardDetailsMockup2 (draft)

Next steps

1. Map as-is processes, agreements, roles
   - Will use existing documentation as input where available
   - Interviews will be conducted to supplement documentation, or to substitute for it, if it is not available

2. Document key as-is information where missing; document initial findings

3. Document gaps and recommendations

4. Define action plan and team structure to address the issues

Working space

Working items

Metrics notes

System	Business metric or SLA	Corresponding IT metric
iFax (P1)	< $30 million of orders entered but not booked at the end of each week	*<TBD. E.g., 100% uptime target, no P1 incidents on Friday (all rel. time zones)>*
iFax (P1)	All orders > $1 million are ordered within four hours	*<TBD. E.g., 100% uptime target, 0 P1 incidents in last two days of the quarter>*
iFax (P1)	Tool is "performing" at key sites	*<Define transactions and acceptable ranges, using scripts and baseline data>*

Emerging actions

Action	Owner	Rationale
Identify better and/or additional metrics to improve correlation between business drivers & SLAs and IT reporting	Melissa (with Dale)	Current metrics insufficiently tied to business SLAs. As a result, system issues may cause missed business SLAs while meeting all IT SLAs.
Investigate ordering tools deficiencies, usage drivers for large, complex customers		Understand whether dependence on fax technologies is due to ordering deficiencies or culture/capabilities of the customers using it. Understand whether iFax will continue to a critical tool indefinitely, or whether it may become significantly less important – to drive planning/support for it

Process / IT alignment

Process	Critical Tools	Business Owner	IT Owner
Order entry	iFax, ordering tools, CSCC, ICE	Dan Gilbert, Parisa N.	GPSS / Jeff Lawless
Order validation	OM (QTCPRD)	Dan Gilbert, Parisa N.	GPSS / Jeff Lawless … ?
Order booking	OM (QTCPRD)	Dan Gilbert, Parisa N.	Dale, Josephina?
Order fulfillment	(Out of scope)	Karl Braitberg, Edwin de Boer	Dale, Bonnie?
Invoicing	AR		Dale, Nicole
Revenue recognition			Dale, Nicole

Backup

Project background

Project background (recap)

- The CS business is experiencing consistent systems stability issues
    - Not clear (so far) which CS systems have been identified as unstable

- Responsibility for critical CS systems spans four IT groups: CVCM, ITDS, C&C IT, and GPSS, with additional dependencies on other groups

- There are disconnects with respect to roles, boundaries, and expectations among IT groups and the business
    - There appear to be misunderstandings within IT regarding what is provided for IM and PM, as well as shortcomings in IM/PM processes
    - There is reported to be a fair amount of "emotion" in the relationships among the IT groups and between IT and the business

- There are communication and coordination gaps among IT groups and the business
    - In one case, a critical system (iFax) was brought down for maintenance without coordination/communication with business
    - In some cases, critical CS systems were down and CVCM IT did not know

- As a result, the CS business has suffered a lack of confidence in IT

Objectives for the Tiger Team (recap)

- The overall goal is to define and execute a "Get Well" plan that will reassure the business and regain its confidence

- This will include the following activities:
  - Identify as-is processes, agreements, roles, boundaries, gaps
  - Define the handshake between CVCM and ITDS; provide consistent capabilities and a consistent face to the business
  - Define a role that would be the face to the business for support
  - Define and institute standardized, repeatable processes in response to any event, including STF, LTF
    - Including roles on bridges, escalation means, decision-making, etc.
  - Define and institute ongoing improved communications:
    - Performance and availability
    - Outages and actions taken/in-process/complete
    - Preventative maintenance
    - Issues avoided

Scope (recap)

- Support model, agreements, processes, organizational hand-offs: as-is and to-be

- In scope:
  - Order/revenue booking systems and CVCM business functions
  - IT organizations involved in support of those systems and functions (CVCM-IT, ITDS, C&C IT,…)
  - Incident Management, Problem Management, Communications
  - Documentation that defines agreements, standards/expectations, processes, measures, etc.
  - Means to measure performance to agreements
  - Critical systems identification as an input to defining agreements that will be needed to support them

- Out of scope:
  - Supply chain management or other systems and business functions – at least, in initial assessment and definition