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# **End-User Requirements Framework — BU Engagement**

January, 2006

# BU engagement process

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<i>First meeting:</i>	<ul style="list-style-type: none"><li>▪ Level-set on intent, objectives, framework, metrics</li><li>▪ Develop preliminary BU framework execution plan</li><li>▪ Identify next steps and plan to address</li></ul>
<i>Second meeting:</i>	<ul style="list-style-type: none"><li>▪ Discuss focus areas for '06 piloting and identify commitments</li><li>▪ Develop proposal for BU/organization execution plan</li></ul>
<i>Third meeting:</i>	<ul style="list-style-type: none"><li>▪ Ratify execution plan</li><li>▪ Review and finalize roadmap for Phase 1 supporting infrastructure (e.g., roles, forums, competencies, methodologies, tools, training)</li></ul>

# Meeting objectives

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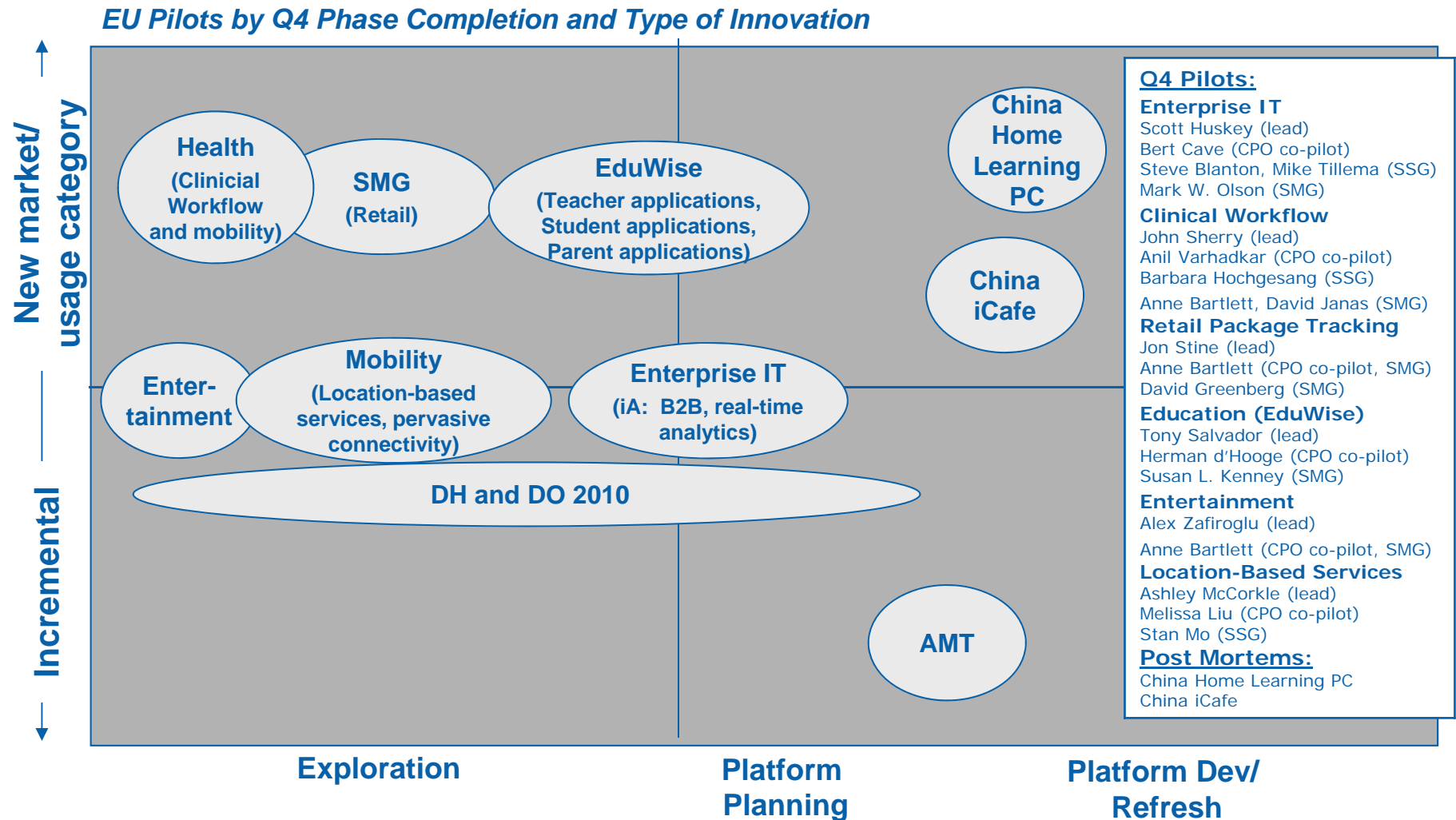
Close on '06 piloting of End User Requirements System:

- Level-set on the objectives, intent, and framework
- Agree on success metrics
- Discuss BU/org framework application
- Identify next steps

# Organizational engagement progress

<i>Biz group</i>	<i>Invitees</i>	<i>Pre-Mtg</i>	<i>1st Mtg Held</i>	<i>Team Defd</i>
<b>MG</b>	<ul style="list-style-type: none"> <li>Strategic Planning: Andy Greenhalgh, Chuck Brown, Ashley McCorkle, Alex Peleg</li> <li>Platform Planning: George Thangadurai, Anand. Pashapathy, Dan Cohen</li> </ul>	✓	Jan 6 ✓	
<b>DEG/ servers</b>	<ul style="list-style-type: none"> <li>Strategic Planning: Wilf Pinfold</li> <li>Platform Planning: Randy Nickel</li> <li>End-user (EPI): P. Rampalli, N. Sharma, S. Huskey, C. Simonich</li> <li>Architecture: Steve Pawlawski</li> </ul>	✓	Jan 9 ✓	✓
<b>DEG/ client</b>	<ul style="list-style-type: none"> <li>Strategic Planning: Steve Grobman</li> <li>Platform Planning: Sanjay Vora</li> <li>End-user (EPI): P. Rampalli, N. Sharma, S. Huskey, C. Simonich, M. Schmitt, Luke Koons</li> <li>Architecture: Steve Pawlawski</li> </ul>	✓	Jan 10 ✓	✓
<b>DEG/ Storage &amp; Networking</b>	<ul style="list-style-type: none"> <li>Strategic Planning:</li> <li>Platform Planning:</li> <li>End-user:</li> </ul>		<i>TBD</i>	
<b>DHealth</b>	<ul style="list-style-type: none"> <li>Strategic Planning: Ray Askew, Jon Puskas</li> <li>Platform Planning: Alex Go, Doug Busch</li> <li>End-user: Eric Dishman, John Sherry, Shauna Pettit-Brown</li> </ul>	✓	Jan 23 ✓	
<b>DHome</b>	<ul style="list-style-type: none"> <li>Strategic Planning: Ted O'dell</li> <li>Platform Planning: Darin Eames and Jim Valerio</li> <li>End-user: Genevieve Bell, Michael Payne, Francoise Bourdonnec</li> </ul>		Jan 25, Jan 30	
<b>CPG</b>	<ul style="list-style-type: none"> <li>End-user (EMPG): Willy Agatstein, Tony Salvador</li> <li>Platform Planning: J. Deatherage, R. Morales, R. Depaula, B. Nagaraj</li> </ul>	✓		
<b>SMG</b>	<ul style="list-style-type: none"> <li>End-user (CSG): Mark Olson, Anne Bartlett</li> </ul>		<i>TBD</i>	

# Q4 pilots, short funnels



# Agenda

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Time	Topic	Desired Outcome	Led By
15 min	Introduction	<ul style="list-style-type: none"><li>• Level-set on drivers, success metrics, accomplishments to date, and '06 direction</li></ul>	BU end-user representative, Mary
25 min	Focus areas for '06	<ul style="list-style-type: none"><li>• Identify commits on focus areas for piloting the framework</li></ul>	BU end-user representative
30 min	Update on End-User Requirements Framework	<ul style="list-style-type: none"><li>• Communicate progress and provide overview of the framework</li></ul>	Mary
25 min	Discuss '06 pilot execution plan	<ul style="list-style-type: none"><li>• Confirm pilot execution and opens</li></ul>	BU end-user representative
25 min	Next steps	<ul style="list-style-type: none"><li>• Gap assessment, execution roadmap completion</li><li>• Identify other open items and next steps to close</li></ul>	Mike S., Mary

# Initiative drivers

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## Four key gaps to close (from 2004 Team 6 AR):

1

- Requirements: Comprehensive, **long-term requirements for target markets** and **customers** not consistently and efficiently **identified**, **translated**, and continuously **validated**

2

- Vision: Need to better **translate** requirements into a clear **5+ year** platform vision to drive platform definition, guide future platform **roadmap**, and set long lead-time **research** agenda

3

- Synchronization and Consistency: Cadence for key ingredients and technologies not aligned with platforms; minimal risk mitigation plans

Part  
of Team  
7

- Ecosystem: Combined impact of accelerated technology deployment and more complex platform enabling driving <company deleted> and SW ecosystem out of alignment

**AR: “Streamline and Align <company deleted>’s Planning Systems and Structure to Match our Platform Strategies”**

# Goals and Strategies

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## Goals

- Drive usages into platform architectures and brand
- Focus on strategic cross-platform opportunities

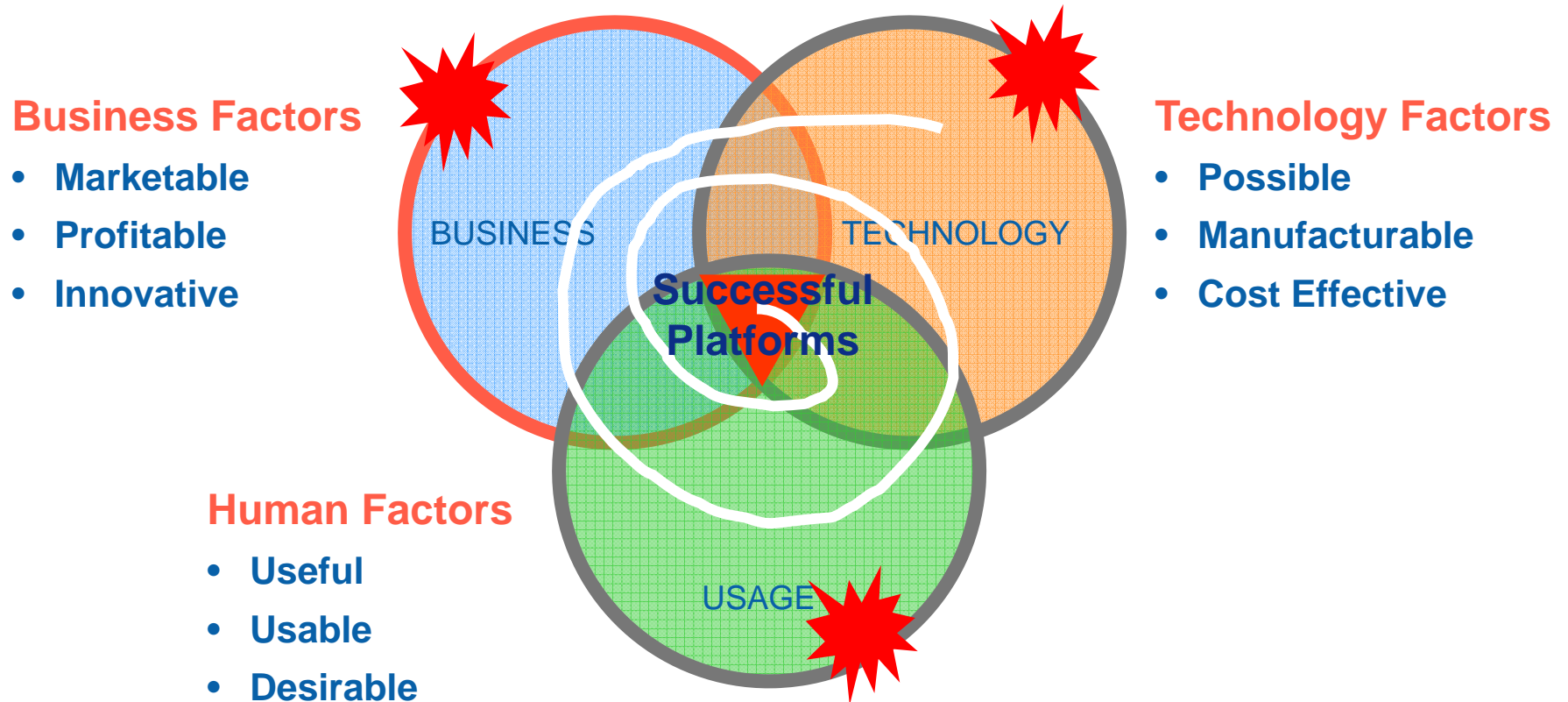
## Strategies

- Consistent framework and language
- Adapted to our businesses
- Value / risk assessment at all stages (usage, biz, tech)
- Seamless: exploration to platform & tech planning
- Execution support: job roles, training, metrics, forums, BKM's



# Integrating usage perspective into platforms

*Intent: Elevate the usage perspective to the level of the Business and Technology Vectors—not MORE important, but AS important*



*Finding the center/success requires iteration through all viewpoints*

# Integrating usage perspective into platforms

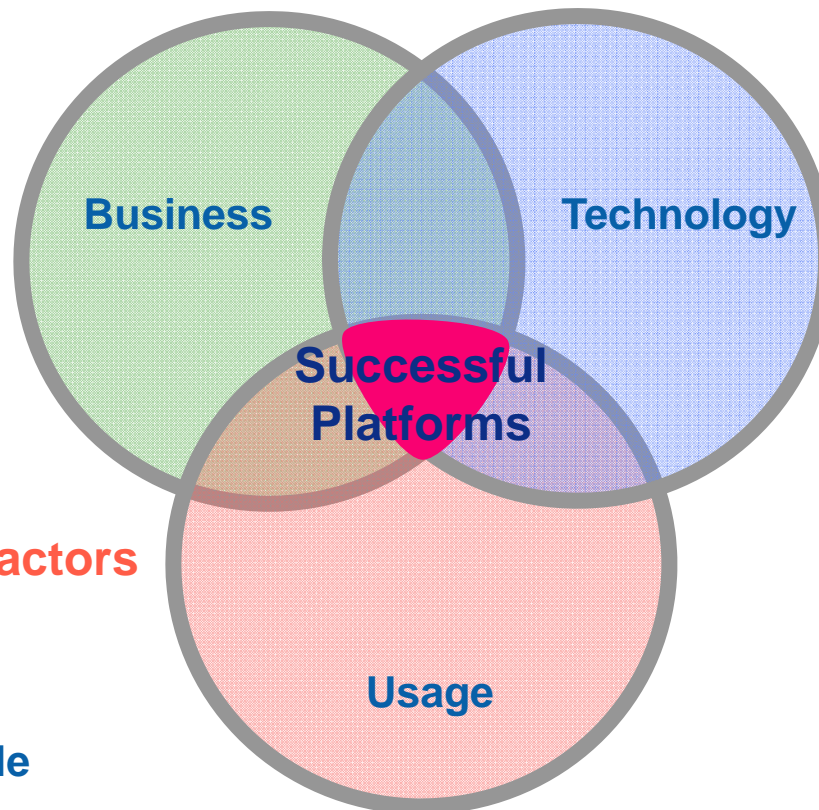
*Intent: Elevate the usage perspective to the level of the Business and Technology Vectors—not MORE important, but AS important*

## Business Factors

- Marketable
- Profitable
- Innovative

## Human Factors

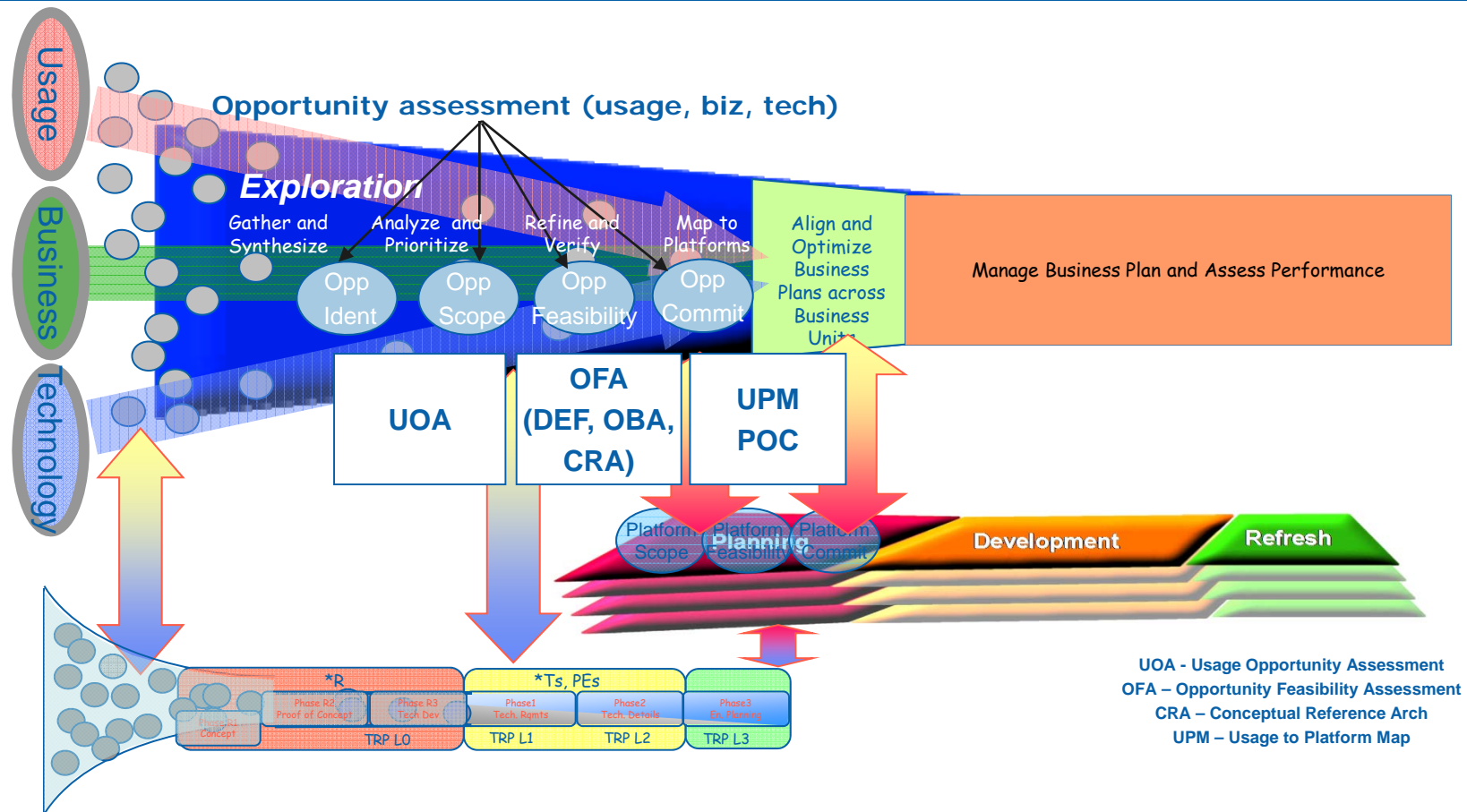
- Useful
- Usable
- Desirable



## Technology Factors

- Possible
- Manufacturable
- Cost Effective

# Linkage from Exploration to Corporate, BU, Technology processes

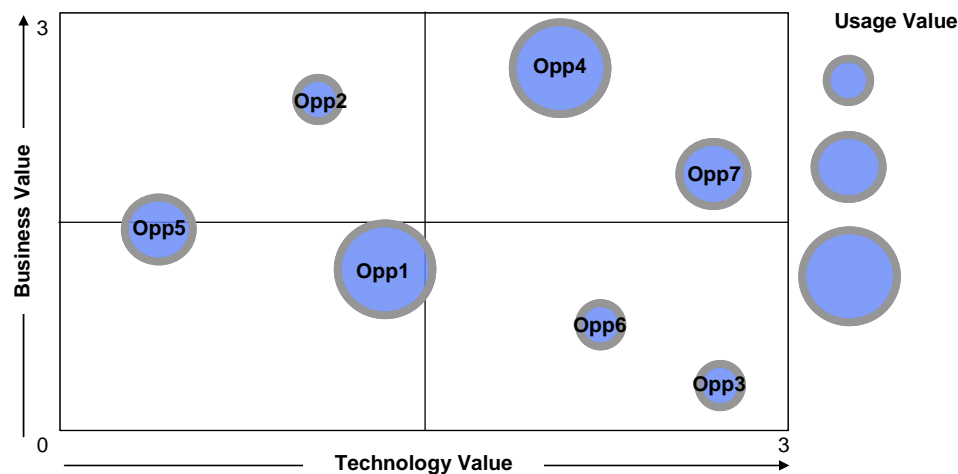


**Alignment of Business, Usage, Technology Vectors, AND linkage of Exploration to Corporate, BU, Platform, and Technology processes**

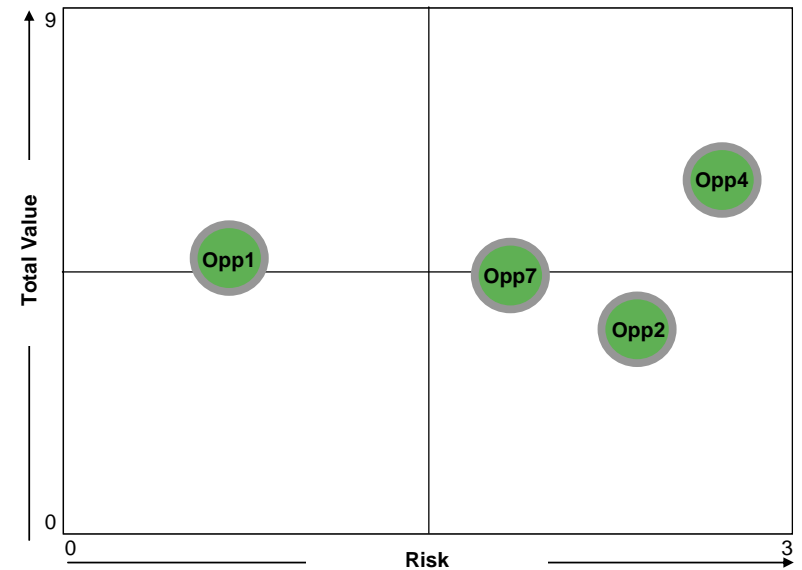
# Opportunity assessment tool

Opportunities assessed along usage, business, and technology dimensions at appropriate level based on maturity

- Goal: Assessment's precision is no greater than its level of accuracy



*Plot of value along business, usage, technology dimensions for a set of opportunities*



*Plot of total value (B+U+T) versus risk for a set of opportunities*

- Initial gates: High-level, qualitative, less substantiating evidence
- Later gates: Details flushed out, assumptions proved/disproved with research, more quantifiable
- Key assumptions and supporting data visibly documented and provided for discussion – decisions not solely via calculated numbers
- Gaps in supporting data clearly called out and used to drive research plan for next stage to confirm/disprove assumptions
- Assessed value and risk used together *with supporting data and judgment* to identify opportunities with the highest value for

# Opportunity assessment tool dimensions

## Business

- **Financial impact** (e.g., Payback period, ROI, NPV, profitability)
- **Market Impact** (e.g., TAM, MSS, SOW, ASP; strength of demand, immediacy of opportunity; potential to grow or cannibalize existing markets, enable new markets, grow ecosystem network in emerging markets)
- **Value chain** viability and impact
- **Brand impact**: E.g., Support for corporate/EIB brand strategies and images; basis if any for new EIB, potential to promote <company> as a market leader/innovator, etc.
- **Risk mitigation**: Potential undesirable consequences to not pursuing
- **Strategic alignment**: Degree of alignment with BU, corporate strategies
- **Sustainable competitive advantage**: Barriers to entry (replacements, complements, substitutes, competitors); degree of “head-start” by <company> or competitors, new standards needed, etc.
- **Potential for re-use**: Leveragability to other geos, markets, target users; re-use of technology; leveragability of usage model innovation, re-use of existing or creation of new reusable capabilities and assets; leveragability to other platform groups, etc.

## Usage

- **Need**: Degree of un-met, important need; extent to which target users recognize need; evidence of sustainable need versus fad; strength of value proposition and degree to which it is easily communicable; ethnographic, demographic issues, trends that would be addressed
- **Impact**: expected impact to user productivity and/or satisfaction; extent to which a solution may improve user well-being, development, growth
- **Attractiveness**: Attractiveness from a cost perspective: affordability, ROI, etc.; Kano model values: expected/desired/exciting; Uniqueness, appeal, mainstream potential, willingness (and ability) to pay
- **Barriers to user acceptance/adoption**: degree of behavior change required; complexity of usability issues anticipated, learning/training required, etc.

## Technology

- **Capability fit**: Ability to leverage current capabilities (mfg, engr, ingredients, platforms, etc.)
- **Investment**: Level of investment required, confidence of delivering technology at required price points, etc.
- **Fit** with existing **architectures** and **roadmaps**
- **Future impact**: Development of new capabilities likely to be reused or foundation for future technologies
- **Alignment with industry milestones** (e.g., OS releases)
- **Technology readiness**: Degree to which needed technology exists, maturity, quality level, etc.
- **Confidence** of successful execution, schedule predictability, risk

# Success metrics for '06: MBOs

	Grader	Scoring			
1) Design and pilot an integrated platform lifecycle mgmt (PLM) system to manage project and product information	ISTG, CPO	0	0.5	1	1.25
		0 – 2	3 – 4	5 – 6	7 – 8
AMB: 1) iPLM (Phase 1) piloted on two Platforms: one in DEG and one in MG: 2 points 2) PLM system able to capture and report cycle-time data for pilots: 2 points 3) Demonstrate ability to view Schedule, Risk, and Requirements data from the iPLM: 1 point 4) Platform Design BOM management capability viewable by PxT and TMG: 3 points					
2) Test the End-User Requirements System in targeted usage areas	CPO, PGs	0	0.5	1	1.25
		0	6	10	15
AMB: total # of usage areas piloted across 5 BUs + SMG, with at least 1 usage from each BU to achieve 1.0 /1.25.					
3) Corp PPLC Rev1.0 deployed and adopted	CPO, PGs	0	0.5	1	1.25
		<70%	70%	80%	>90%
AMB: % of platforms that achieve conformance to PPLC Rev1.0 milestones and deliverables					
4) Broadly deploy Schedule & Risk mgmt Methods/Tools	CPO, PGs	0	0.5	1	1.25
		<60%	60 – 70%	70 – 80%	>80%
AMB: 1) TOC/PM Deployments on X% of new platforms 2) Risk Method and Tool Deployments on X% of new platforms					



# End-User Requirements Success Metrics (Examples)

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## Phase 1:

Goal: Establish baseline for business impact measurement

## Metrics:

- **Usage Modeling Effectiveness in Shaping Platform Planning:**
  - Number of usage opportunities evaluated across all three circles and passing Opportunity Feasibility Approval
  - Number of usage opportunities entering into the platform planning pipeline (PPOPL1)
  - Number of usage opportunities for which the usage content is driven through the end of platform planning (PPOPL2)
- **Platform Planning Effectiveness in Comprehending Usages:**
  - Platform validation against defined usages (report card)
- **Total Usage Opportunities in Funnel**
  - Total Usages identified
  - Total Usages scoped; Total usage Committed
- **Estimated business value of by Usages and Total**

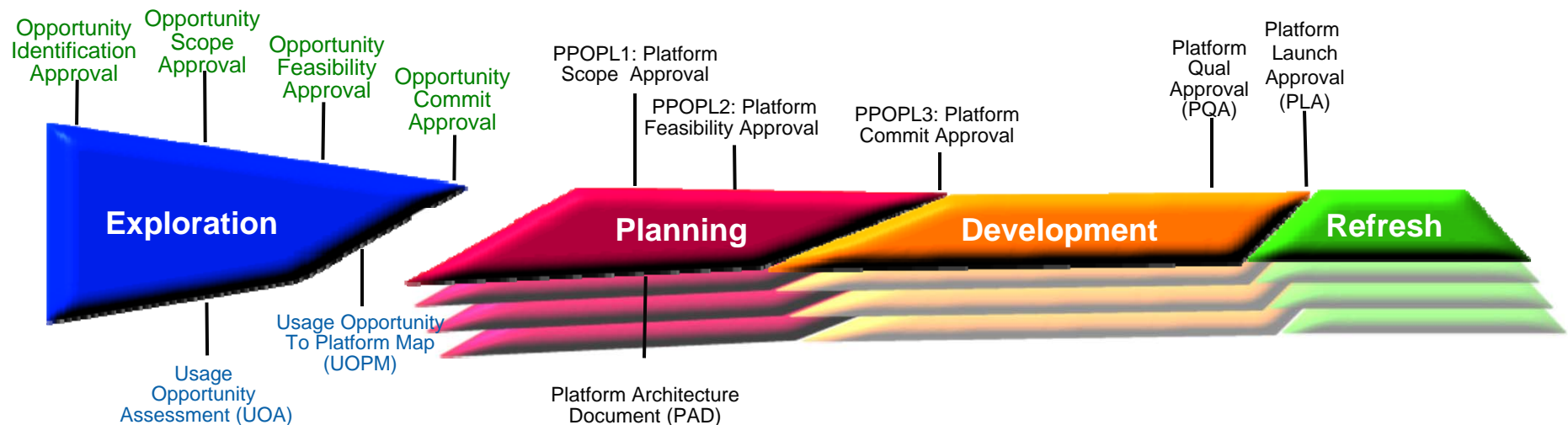
# Exploration and usage and PPLC 1.0

From PPLC 0.5: Corporate Planning Process  
**EU changes** for 1.0: UOA document as an input

MSA  
TOA } PSD

**NEW:** Defined cross-platform,  
multi-generational opportunity  
Exploration process

From PPLC 0.5: Model-year Platform planning and execution process  
**EU changes** for 1.0: Revisions to reflect Usage end-to-end

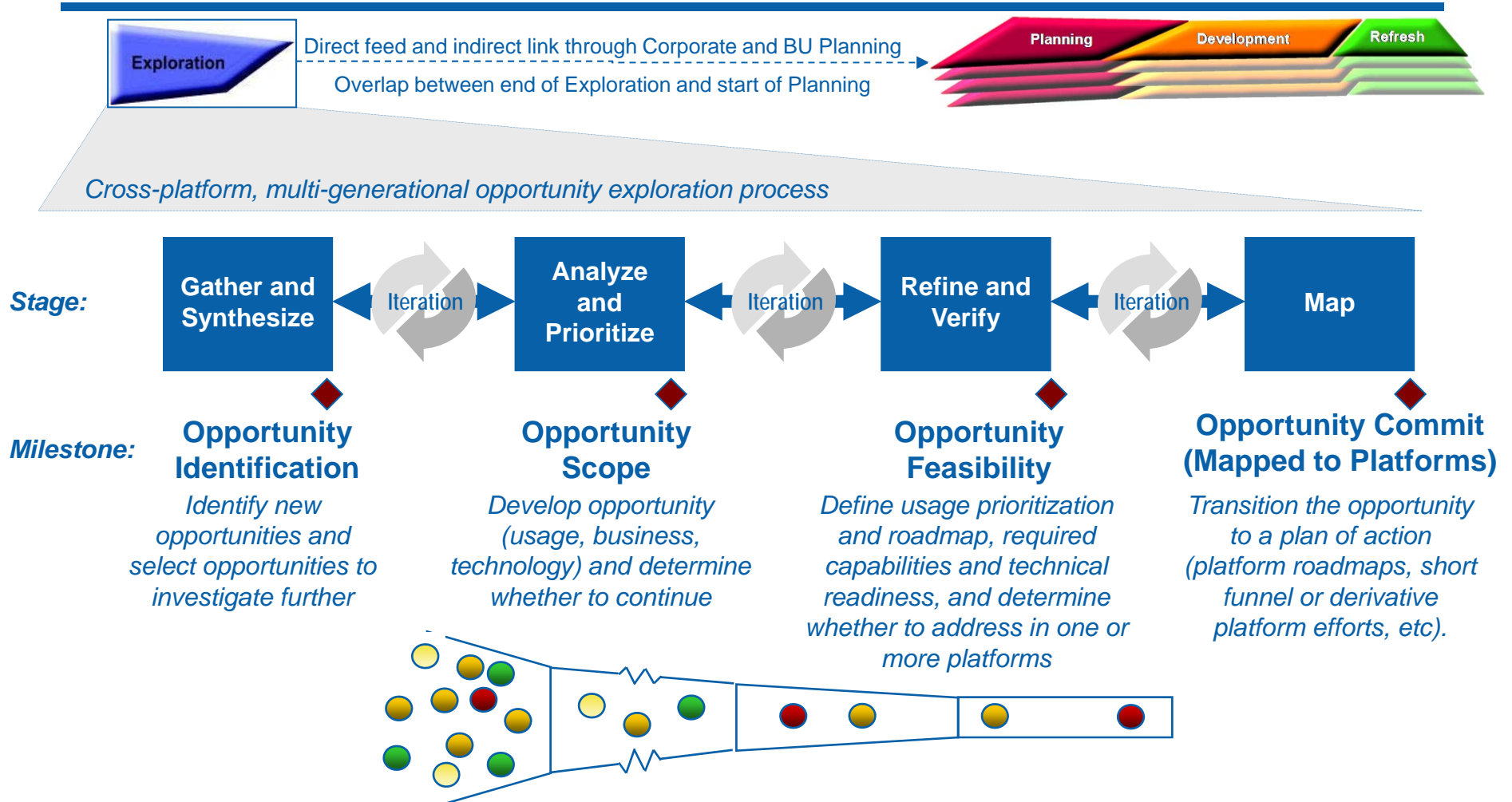


Green text: New Exploration milestones

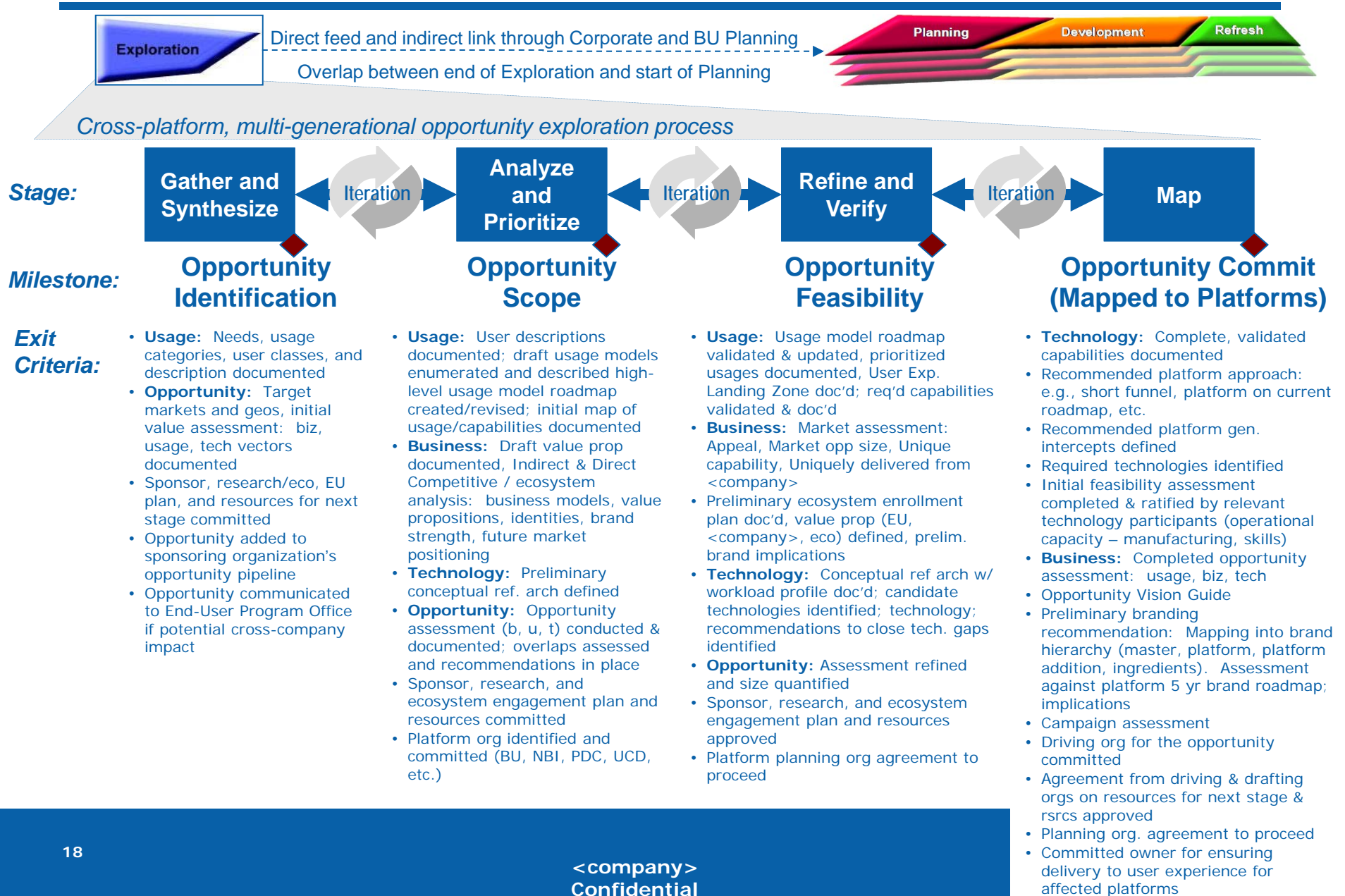
Blue text: Exploration phase deliverables



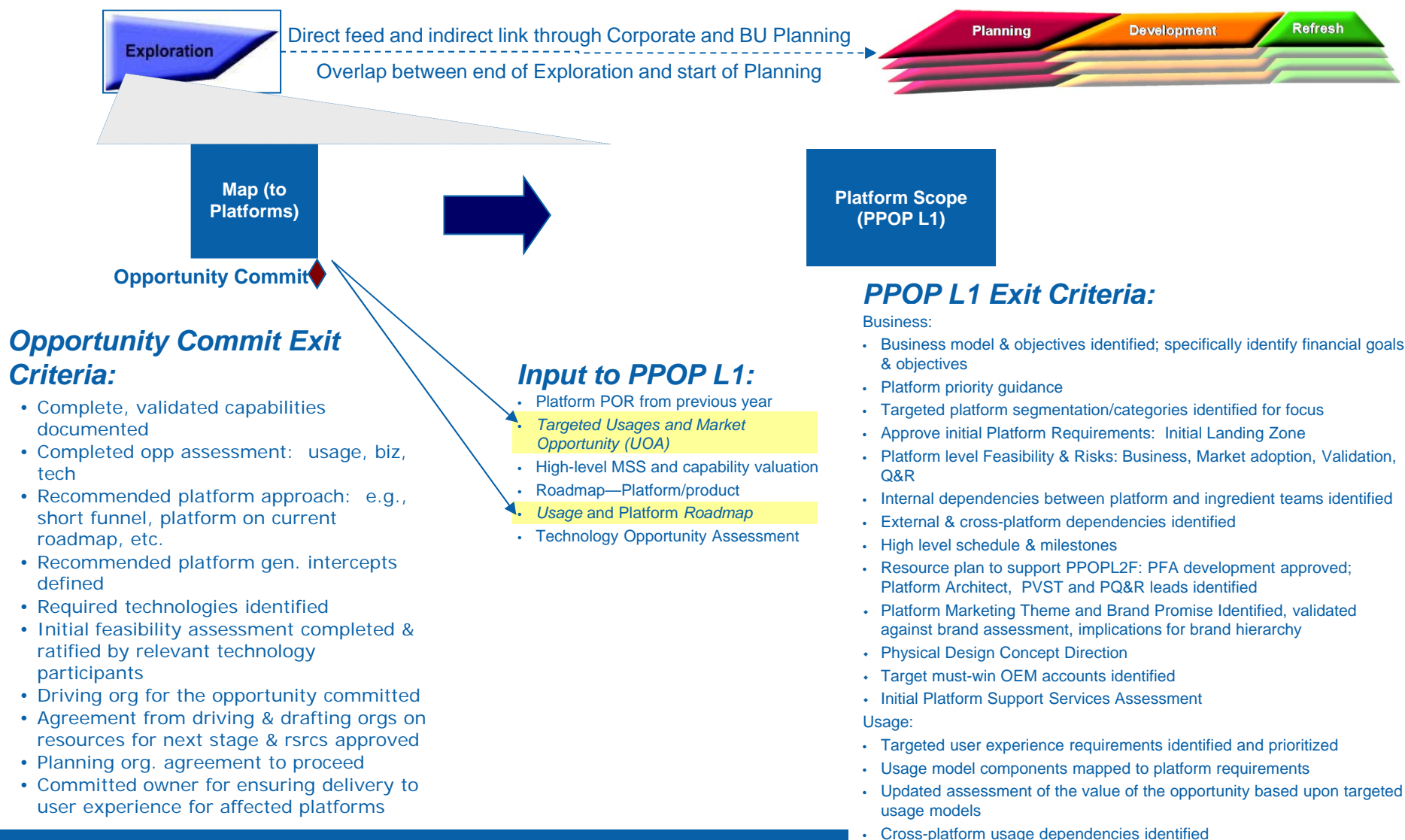
# EU requirements — Stages, goals, and milestones



# EU requirements — Stages, goals, and milestones



# EU requirements — Transition to platform planning



# Planning milestone exit criteria – WW5

## Platform Scope (PPOP L1)

### Business:

- Business model & objectives identified; specifically identify financial goals & objectives
- Platform priority guidance
- Targeted platform segmentation/categories identified for focus
- Approve initial Platform Requirements: Initial Landing Zone
- Platform level Feasibility & Risks: Business, Market adoption, Validation, Q&R
- Internal dependencies between platform and ingredient teams identified
- External & cross-platform dependencies identified
- High level schedule & milestones
- Resource plan to support PPOPL2F: PFA development approved; Platform Architect, PVST and PQ&R leads identified
- Platform Marketing Theme and Brand Promise Identified, validated against brand assessment, implications for brand hierarchy
- Physical Design Concept Direction
- Target must-win OEM accounts identified
- Initial Platform Support Services Assessment
- Platform Marketing Theme and Brand Promise / Alignment (Corp/Consumer Value Prop)
- Physical Design Concept PC Direction

### Usage:

- Targeted user experience requirements identified and prioritized
- Usage model components mapped to platform requirements
- Updated assessment of the value of the opportunity based upon targeted usage models
- Cross-platform usage dependencies identified

## Platform Feasibility (PPOP L2F)

### Business:

- Complete list of platform requirements documented (landing zone) and financial targets/criteria identified and feasible, put under change control
- Ecosystem needs and plans identified and documented
- Development and enabling execution owners identified
- Ingredient execution, validation, and enabling team owners have a clear and concise understanding of the targeted platform requirements and commit to providing 90% commits by PPOPL3
- Technology TRP L2 aligned
- Platform Architecture Document (PAD)
- Platform Vision guide L1
- Brand Feasibility Assessment: initial valuation (investment, risk, ability to deliver and implications)
- Lead ingredient POPL2 aligns with Assembly Technology Dev milestones and other ingredients have scoping activities in place throughout PPOPL1 & L2 timeframe (TMG)

### Usage:

- Usage models and platform SKU definitions and requirements documented and under change control
- Prioritized usage models w/ identified test requirements
- Usage models evaluated for cross-platform and cross-group impact
- Demonstrated traceability between usage models, platform requirements, ingredient requirements
- Demonstrated traceability between usage models, business objectives and technologies
- Updated assessment of opportunity value based upon prioritized usage models

## Platform Commit (PPOP L3)

### Business:

- Internal development & external enabling plans documented w/ a path to 90% commit on the requirement landing zone minimums, resources in place to evaluate/assess stretch goals
- Resource plan approved/committed by identified execution owners
- Received customer feedback and it is consumable
- Requirements clearly mapped back to Usage Models
- Financial targets/criteria committed
- Detailed schedule approved; MAP day or Network Build (TOC) outputs
- Risk mitigation plans, owners and approved
- Platform Qualification strategy and plan approved
- Ecosystem readiness tracking in place
- GTM L1
- Final Platform Support Services Assessment
- Post sales support plan
- Target must-win OEMs with conditional commitment to evaluate and/or design
- Management review forums for checkpoints and escalation process identified
- Approve documented contents as the Platform POR and put under change control
- Updated Platform Requirements (including feasibility information; assessed for support of usage models and assoc. landing zones)
- Platform Qualification JET established, linked to ingredient teams

### Usage:

- Demonstrated traceability between the usage models committed to and the platform requirements
- Usage model test plan in place
- Final assessment of opportunity value based upon the usage models committed

# Planning milestone exit criteria – WW5

## Platform Scope (PPOP L1)

### Business:

- Business model & objectives identified; specifically identify financial goals & objectives
- Platform priority guidance
- Targeted platform segmentation/categories identified for focus
- Approve initial Platform Requirements: Initial Landing Zone
- Platform level Feasibility & Risks: Business, Market adoption, Validation, Q&R
- Internal dependencies between platform and ingredient teams identified
- External & cross-platform dependencies identified
- High level schedule & milestones
- Resource plan to support PPOPL2F: PFA development approved; Platform Architect, PVST and PQ&R leads identified
- Platform Marketing Theme and Brand Promise Identified, validated against brand assessment, implications for brand hierarchy
- Physical Design Concept Direction
- Target must-win OEM accounts identified
- Initial Platform Support Services Assessment

### Usage:

- Targeted user experience requirements identified and prioritized
- Usage model components mapped to platform requirements
- Updated assessment of the value of the opportunity based upon targeted usage models
- Cross-platform usage dependencies identified

## Platform Feasibility (PPOP L2F)

### Business:

- Complete list of platform requirements documented (landing zone) and financial targets/criteria identified and feasible, put under change control
- Ecosystem needs and plans identified and documented
- Development and enabling execution owners identified
- Ingredient execution, validation, and enabling team owners have a clear and concise understanding of the targeted platform requirements and commit to providing 90% commits by PPOPL3
- Technology TRP L2 aligned
- Platform Architecture Document (PAD)
- Platform Vision guide L1
- Brand Feasibility Assessment: initial valuation (investment, risk, ability to deliver and implications)
- Lead ingredient POPL2 aligns with Assembly Technology Dev milestones and other ingredients have scoping activities in place throughout PPOPL1 & L2 timeframe (TMG)

### Usage:

- Usage models and platform SKU definitions and requirements documented and under change control
- Prioritized usage models w/ identified test requirements
- Usage models evaluated for cross-platform and cross-group impact
- Demonstrated traceability between usage models, platform requirements, ingredient requirements
- Demonstrated traceability between usage models, business objectives and technologies
- Updated assessment of opportunity value based upon prioritized usage models

## Platform Commit (PPOP L3)

### Business:

- Internal development & external enabling plans documented w/ a path to 90% commit on the requirement landing zone minimums, resources in place to evaluate/assess stretch goals
- Resource plan approved/committed by identified execution owners
- Received customer feedback and it is consumable
- Requirements clearly mapped back to Usage Models
- Financial targets/criteria committed
- Detailed schedule approved; MAP day or Network Build (TOC) outputs
- Risk mitigation plans, owners and approved
- Platform Qualification strategy and plan approved
- Ecosystem readiness tracking in place
- GTM L1
- Final Platform Support Services Assessment
- Post sales support plan
- Target must-win OEMs with conditional commitment to evaluate and/or design
- Management review forums for checkpoints and escalation process identified
- Approve documented contents as the Platform POR and put under change control
- Updated Platform Requirements (including feasibility information; assessed for support of usage models and assoc. landing zones)
- Platform Qualification JET established, linked to ingredient teams

### Usage:

- Demonstrated traceability between the usage models committed to and the platform requirements
- Usage model test plan in place
- Final assessment of opportunity value based upon the usage models committed

# Planning milestone exit criteria

## Platform Scope (PPOP L1)

### Exit Criteria:

- Business model & objectives identified
- Platform priority guidance
- Targeted platform segmentation/categories identified for focus
- Approve initial Platform Requirements, Landing Zone
- *Platform level Feasibility & Risks: Business, Market adoption, Validation, Q&R*
- Internal dependencies between platform and ingredient teams identified
- External & cross-platform dependencies identified
- High level schedule milestones and risk exposure categories
- Resource plan to support L2 POP development approved
  - PVST lead identified
- Platform Marketing Theme and Brand Promise / Alignment (Corp/Consumer Value Prop)
- Physical Design Concept Direction
- Validation against brand assessment & recommendation
- Implications for brand hierarchy
- Targeted user experience requirements identified and prioritized
- Usage model components mapped to platform requirements
- Updated assessment of the value of the opportunity based upon targeted usage models

## Platform Feasibility (PPOP L2F)

### Exit Criteria:

- Usage models and platform SKU definitions and requirements documented
  - Put under revision control
- Complete list of platform requirements documented (landing zone)
  - Financial targets/criteria identified and feasible
  - Put under revision control
- Ecosystem needs and plans identified and documented
- Development and enabling execution owners identified
- Ingredient execution, validation, and enabling team owners have a clear and concise understanding of the targeted platform requirements and commit to providing 90% commits by L3F
- Platform Vision guide L1
- Brand Feasibility: initial valuation (investment, risk, ability to deliver and implications)
- Prioritized usage models with clear and concise understanding of test requirements
- Usage models falling out of platform feasibility evaluated for cross-platform and -group impact
- Demonstrated traceability between usage models, platform rqmts, and ingredient requirements
- Demonstrated traceability between usage models, business objectives and technologies
- Updated assessment of the value of the opportunity based upon prioritized usage models

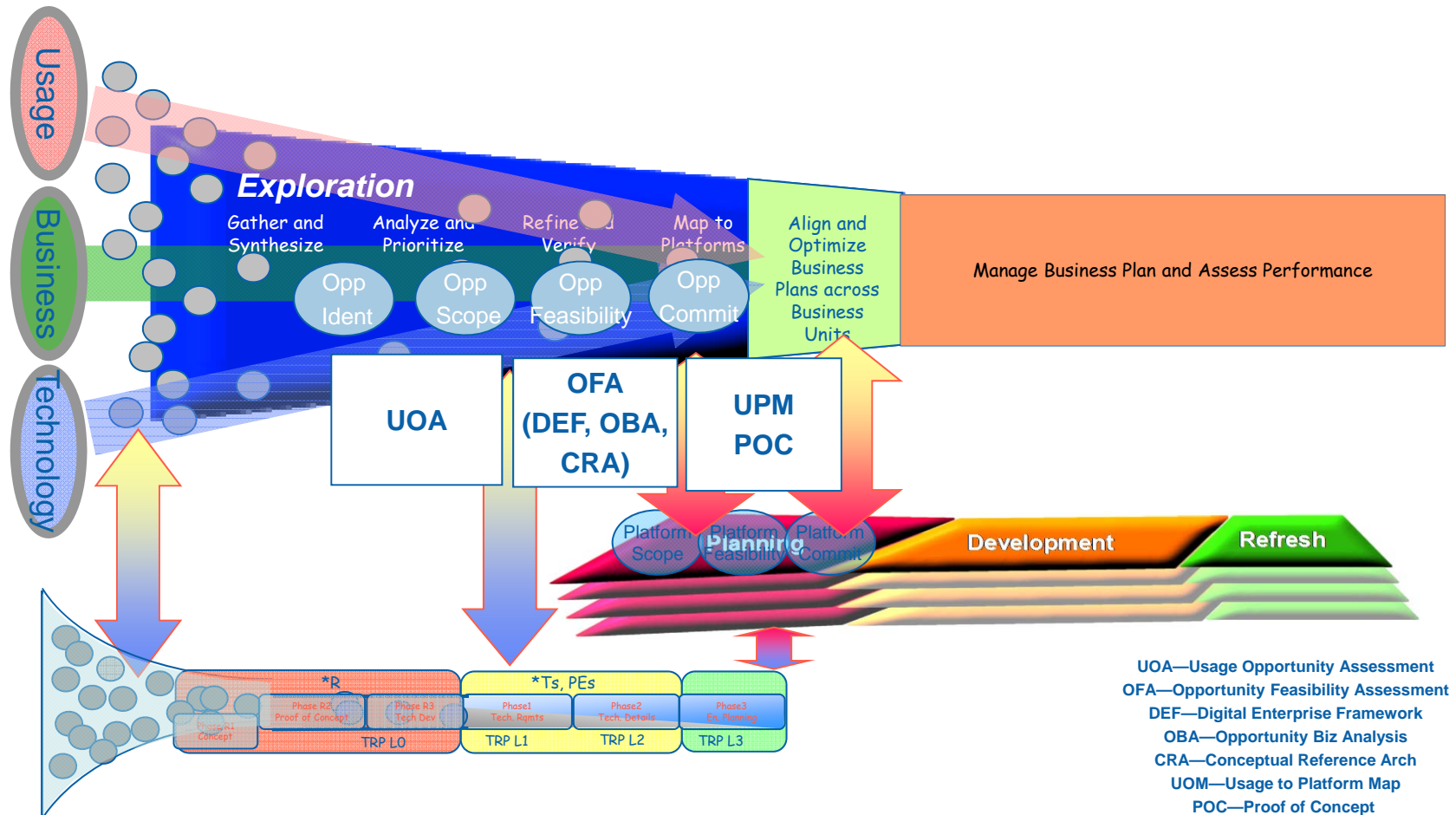
## Platform Commit (PPOP L3)

### Exit Criteria:

- Internal dev. and external enabling plans clearly documented and ID'd path to 90% commit on the rqmt landing zone minimums, but resources in place to evaluate/assess stretch goals
  - Resource plan approved/committed
  - Received consumable customer feedback
  - Rqmts clearly mapped to Usage Models
  - Financial targets/criteria committed
- Risk mitigation plans and owners clear and approved
- Validation strategy and plan clear and approved
- GTM L1: Branding plan (brand requirements, differentiation, valuation, feasibility, execution plan)
- Campaign recommendation, assessment against cross-platform plan
- Go-to-Market & Platform Vision Guide have sufficient guidance to proceed (as applicable by specific business unit's process)
- Management review forums for checkpoints & escalation process identified
- Approve documented contents as the Platform POR
  - Put under Revision Control
- Demonstrated traceability between the usage models committed to and the platform requirements
- Usage model test plan in place
- Final assessment of the value of the opportunity based upon the usage models committed to

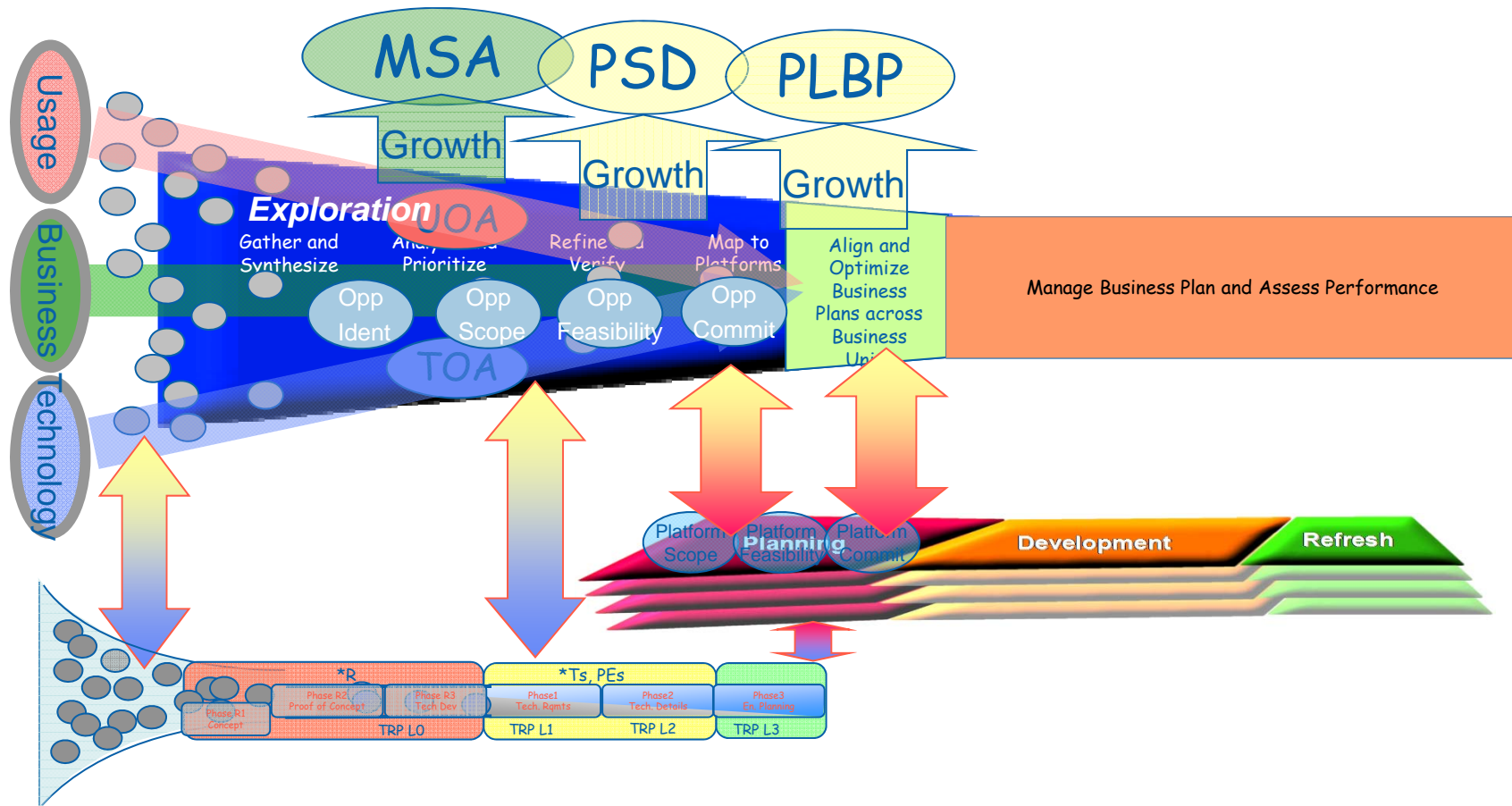


# Linkage from Exploration to Corporate, BU, Technology processes



**Alignment of Business, Usage, Technology Vectors, AND linkage of Exploration to Corporate, BU, Platform, and Technology processes**

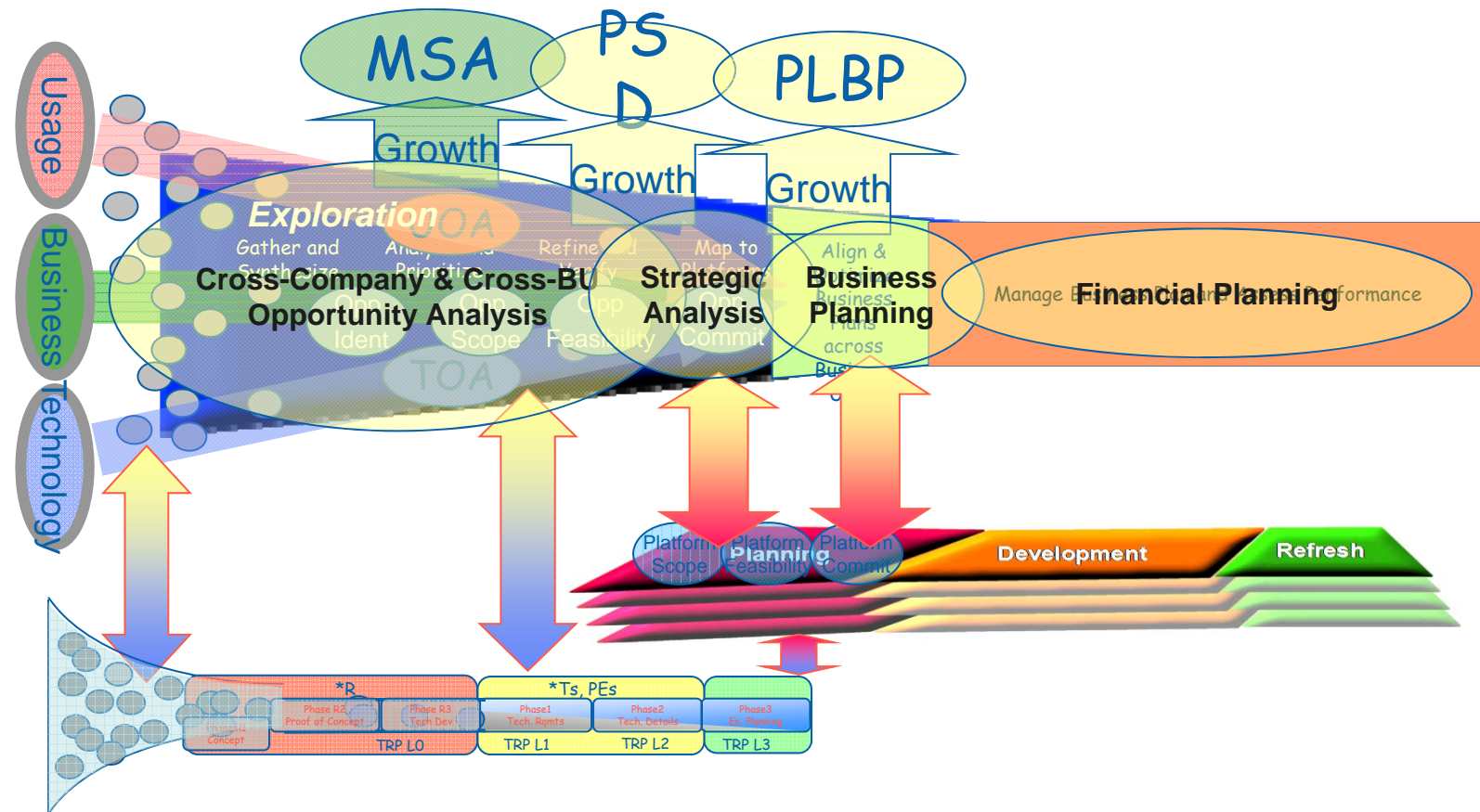
# Linkage from Exploration to Corporate, BU, Technology processes



**Alignment of Business, Usage, Technology Vectors, AND linkage of Exploration to Corporate, BU, Platform, and Technology processes**



# Linkage from Exploration to Corporate, BU, Technology processes

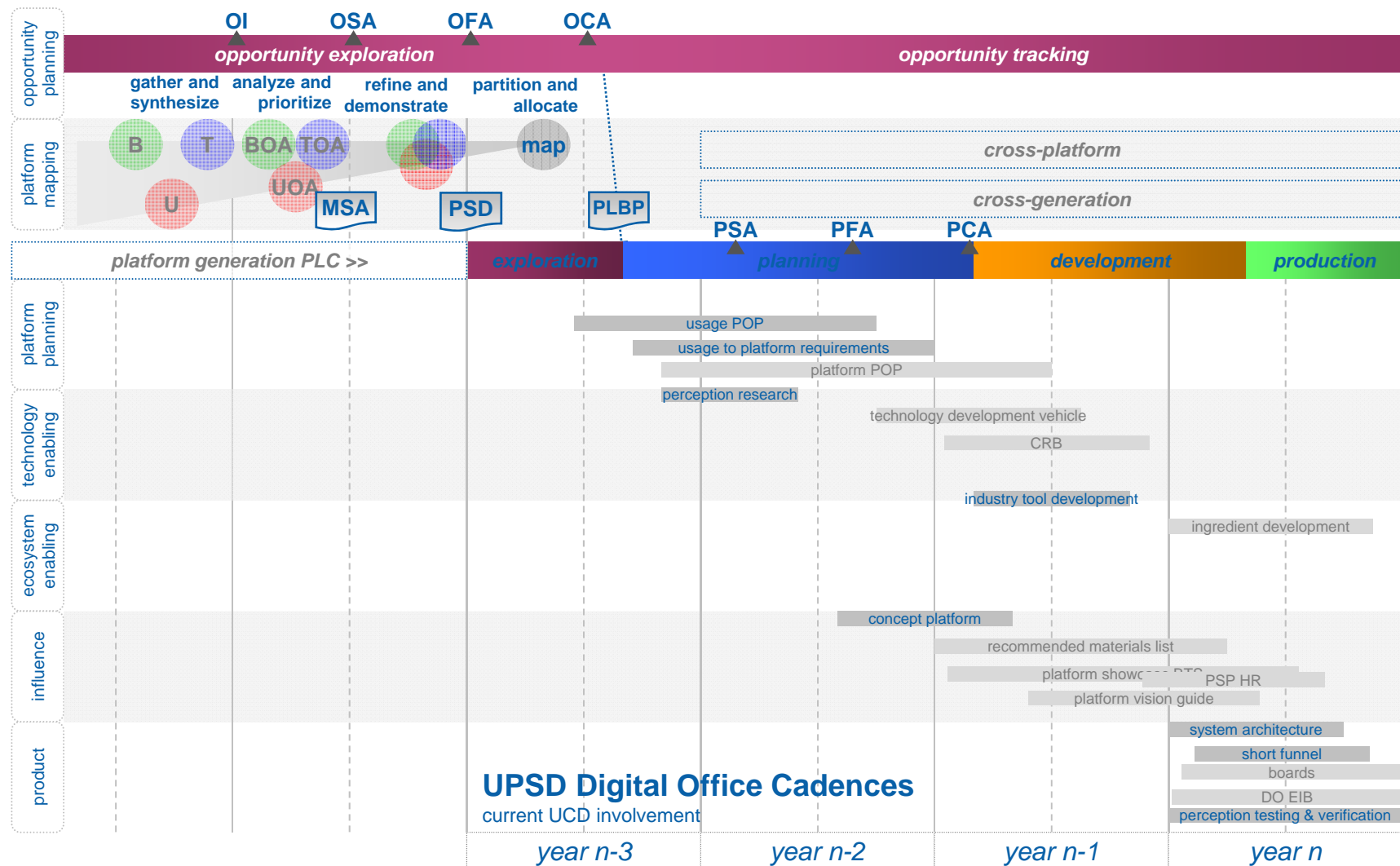


*Alignment of Business, Usage, Technology Vectors, AND linkage of Exploration to Corporate, BU, Platform, and Technology processes*

# Exploration stages and milestones

<i>Stage:</i>	<b>Gather and Synthesize</b>	<b>Analyze and Prioritize</b>	<b>Refine and Verify</b>	<b>Map (to Platforms)</b>
<i>Milestone</i>	<b>Opportunity Identification</b>	<b>Opportunity Scope</b>	<b>Opportunity Feasibility</b>	<b>Opportunity Commit</b>
<i>Ownership: Business, Usage, Technology; Opportunity synthesis</i>	B: Strategic Planning U: End User T: Architecture O: Concept Champion	B: Strategic Planning U: End User T: Architecture O: Concept Champion	B: Strategic Planning U: End User T: Architecture O: TBD	B: Strategic Planning U: End User T: Architecture O: TBD
<i>Decision forum</i>	Sponsoring organization opportunity assessment council	Sponsoring organization opportunity assessment council	Platform organization opportunity assessment council	Platform organization opportunity assessment council
<i>Deliverable</i>	Opportunity Identification Document	<b>Usage Opportunity Assessment (UOA)</b>	Opportunity Feasibility Document	<b>Usage Opportunity to Platform Map (UOPM)</b>
<i>Key roles</i>	User research (SMG market research, user-centered research, ethnography); SMG; strategic planning	User research; strategic planning	Strategic planning; Platform Planning; user research	Strategic planning; Platform Planning; user research
<i>Contributing roles</i>	Platform Planning, brand management, CTG, SSG	Brand mgmt, Eco/enabling, platform arch, CTG, finance, SMG, SSG	Brand mgmt, software ingredient planning, Eco/enabling, platform arch, CTG, finance, SMG, SSG	Brand mgmt, Eco/enabling, platform arch, CTG, finance, SMG, SSG

# User Centered Innovation Competency (UCIC) Process Framework (Draft template)



# Call to action

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Continue the pilots in targeted usage areas

- “Experimental” mode, particular focus on seams (gather, translation to platform planning)

Define roadmap for building out infrastructure to support the framework (organization, roles, forums, competencies, methodologies, guidelines for use, tools, etc.)

Define opportunity assessment owners and decision forums

Complete gap assessment

Create and manage BU and cross-BU opportunity portfolios

Adopt and deliver comprehensive training across BUs spanning competency map (EU framework, PPLC 1.0, usage concepts, etc.)

Measure success to corporate and BU-specific MBOs and other metrics

Execute user-centered innovation and ecosystem collaboration initiatives, e.g., IBM Open Innovation

Continuously assess and share business results and BKMs

# Execution plan – *Example*

	Q1	Q2	Q3	Q4
<i>Framework and Execution</i>	<ul style="list-style-type: none"> <li>• Define steering and working teams</li> <li>• Define forums, ownership, deliverables, roles, milestones</li> <li>• Identify pilot areas (usages, platforms)</li> <li>• Define execution plan for rest of year</li> </ul>	<ul style="list-style-type: none"> <li>• Institute opportunity decision forum(s)</li> <li>• Form team for each pilot area across needed roles</li> <li>• Institute three-circle opportunity assessment</li> <li>• Conduct milestone Y for pilot area X</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct milestone Y for pilot area X</li> <li>• Begin year-end assessment: review forums, deliverables, owners, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct milestone Y for pilot area X</li> <li>• Conduct year-end assessment</li> <li>• Define '07 plan</li> </ul>
<i>Training / Competencies</i>	<ul style="list-style-type: none"> <li>• Gap assessment and resolution plan</li> <li>• Intact team overview training</li> <li>• PPLC 1.0 overview training</li> </ul>	<ul style="list-style-type: none"> <li>• Address gaps (new roles, training, outsourcing, etc.)</li> <li>• Usage model training (e.g., SP, PP, Arch)</li> <li>• Intact team deep dive training</li> </ul>	<ul style="list-style-type: none"> <li>• Address gaps (new roles, training, outsourcing, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Broad usage model training</li> <li>• Broad PPLC overview training</li> <li>• Broad Exploration “deep-dive” training</li> </ul>

# Next steps

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**Backup**

# Decision Tree at each Milestone

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The decisions at each milestone output can result in impact in multiple areas:

- **Platform Planning** 2+ Year horizon (Key Focus for DEG success metrics)
- **Enabling** 18 month (SW and components)
- **Strategic Planning** 5+ Year horizon (Cross platform, multi generational)



# Targeted usage areas for '06

Org	Usage Focus	Platforms	MBO Alignment
<b>MG</b>	<ul style="list-style-type: none"> <li>Pervasive connectivity</li> <li>Location-based computing</li> </ul>	<ul style="list-style-type: none"> <li>Handtops, desktops, notebooks (roadmap '07 – '11)</li> <li>Platform design and VP: 2009, 2010</li> </ul>	<ul style="list-style-type: none"> <li>Strategic planning—yes; other TBD</li> </ul>
<b>DEG</b>	<ul style="list-style-type: none"> <li>EIT/AMT, XML (B2B, Content Routing), Real-Time Analytics, Collaboration, Pervasive Connectivity, E2E Security, Power Thermal Management, SOI (Grid/Blade)</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise server</li> <li>Client Usage POPs Q405; server PPOPs Q1'06</li> </ul>	<ul style="list-style-type: none"> <li>EPI—yes; others TBD</li> </ul>
<b>DHG</b>	<ul style="list-style-type: none"> <li>Digital Entertainment (escape, access, control)</li> <li>Ethnography: focus on social construction of technology (TV, PC, HH)</li> </ul>	<ul style="list-style-type: none"> <li>Mobile/HH, Server, Comms, Desktop/Laptop</li> <li>Strategic input now</li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> </ul>
<b>DHeG*</b>	<ul style="list-style-type: none"> <li>Clinician workflow and mobility</li> </ul>	<ul style="list-style-type: none"> <li>HIT Platform roadmap</li> <li>Oak City: trials and subsequent design</li> </ul>	
<b>CPG</b>	<ul style="list-style-type: none"> <li>Digital Learning (EduWise)</li> <li>Clover (potentially)</li> </ul>	<ul style="list-style-type: none"> <li>Digital Learning fixed function handheld (SF)</li> <li>Clover</li> </ul>	
<b>SMG*</b>	<ul style="list-style-type: none"> <li>Commercial (Retail +1)</li> <li>Public Sector</li> <li>Digital Home</li> <li>Digital Health</li> </ul>	(For Retail) <ul style="list-style-type: none"> <li>Mobile/HH: eco dev (st); new platform (It)</li> <li>Server, Communications, Desktop/Laptop</li> </ul>	<ul style="list-style-type: none"> <li>CSG—yes</li> </ul>

\* Also committed to a tool pilot in '06

**“Commit” = Commit to test the framework (experiment) and inform us of your BKMs and learnings**

# 2005 accomplishments

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## Requirements framework v0.8 defined

- Usage reinforced from exploration through platform planning and delivery: integrated with business and technology vectors end-to-end
- Exploration phase and end-to-end link with multi-generational platform planning defined
- Intersection defined with corporate planning, platform planning, and TRP
- Exploration documentation to be delivered with PPLC 1.0 WW05 2006

## Six pilots executing

- Cross-company engagement: all BUs, SMG, SSG, ISTG, UCD, ICAP, CTG, and PCIC
- Pilot teams plus China Home Learning PC, iCafe
- Initial assessment delivered for Dec 5 Team 6 review
- Coordinated by cross-company program office (EUPO)
- First-level training delivered to pilot teams
- Pilot team '06 commits for targeted usage areas

# Benefits of the EU framework

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Identify new areas of opportunity and enable opportunity valuation and prioritization to drive investment/resource allocation in new opportunity areas

Effectively address new markets using iterative, user-centered approaches to clarify the full scale of what is required (solution, branding, ecosystem, etc.) to deliver effectively to those market needs

Evolve existing platforms to meeting changing needs in existing markets

Ensure user needs and values, capabilities, branding, etc., are consistent and cohesive and delivered together within *solutions*

***Profit plus positioning <company> as a leader in user-centered innovation in the industry***

# Exploration stages and milestones


Stage:	Gather and Synthesize	Analyze and Prioritize	Refine and Verify	Map (to Platforms)
Milestone	Opportunity Identification	Opportunity Scope	Opportunity Feasibility	Opportunity Commit
<b>Milestone intent</b>	Evaluate whether one or more opportunities are attractive enough to warrant further investigation	Identify whether an opportunity seems feasible, has value, and should be further explored, or should be tabled, rejected, or routed to another decision forum	Identify whether an opportunity has merit, is likely feasible, and should be translated to platform impacts	Confirm transition of an opportunity to identified platform intercepts
<b>Opportunity Owner</b>	Concept champion	Concept champion or BU strategic planning	Concept champion or BU strategic planning	Concept champion or BU strategic planning
<b>Forum</b>	Sponsoring organization opportunity assessment council	Sponsoring organization opportunity assessment council	Sponsoring organization opportunity assessment council	Sponsoring organization opportunity assessment council
<b>Decision Maker</b>	Sponsoring organization GM or delegate	Sponsoring organization GM or delegate	Sponsoring organization GM or delegate	Sponsoring organization GM or delegate
<b>Exit criteria</b>	<ul style="list-style-type: none"> <li>• <b>Usage:</b> Needs, usage categories, user classes, and description</li> <li>• <b>Opportunity:</b> Target markets and geos, initial value assessment: biz, usage, tech vectors</li> <li>• Sponsor, research/eco, EU plan, and resources for next stage</li> <li>• <i>TBD: opp. added to sponsoring org's opportunity portfolio; opp. communicated to EUPO if pot. cross-co. impact</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Usage:</b> User descriptions, high-level, un-validated usage models, Target-User Experience Landing Zone, High-Level Usage Roadmap</li> <li>• <b>Business:</b> Initial Value prop</li> <li>• <b>Technology:</b> Initial map of usage to cap, prelim concept ref. arch</li> <li>• <b>Opportunity:</b> Valuation, Overlap</li> <li>• Sponsor, research, and ecosystem engagement plan and resources</li> <li>• Platform org identified and committed (BU, NBI, PDC, UCD, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Usage:</b> Usage roadmap, usage priorities</li> <li>• <b>Business:</b> Preliminary ecosystem enrollment plan, Value Prop, financial impact, brand implications, and recommendations</li> <li>• <b>Technology:</b> Conceptual ref arch, Technology recommendations; <i>TBD: workload analysis; TBD: required capabilities</i></li> <li>• Sponsor, research, and ecosystem engagement plan and resources</li> <li>• Platform planning org agreement to proceed</li> </ul>	<ul style="list-style-type: none"> <li>• Revised opp assessment: usage, biz, tech</li> <li>• Recommended platform approach: e.g., short funnel, platform on current roadmap, etc., and platform model year intercepts</li> <li>• Needed technologies</li> <li>• Landing org for the opportunity (BU, PDC, UCD, NBI,...)</li> <li>• Planning org. agreement to proceed</li> <li>• Clear owner for ensuring delivery to user experience</li> <li>• Approved resource plan</li> <li>• Agreement from relevant technology participants of feasibility at a high level</li> <li>• <i>TBD: capabilities mapped to requirements</i></li> </ul>

# Operationalizing in '06

Deliverables	Forums	Roles	Tools and Approaches	Training
<ul style="list-style-type: none"> <li>• '06 MBO: BUs apply framework to one to two usage areas</li> <li>• Opportunity Identification</li> <li>• Opportunity Scope: Usage Opportunity Assessment (UOA)</li> <li>• Opportunity Feasibility</li> <li>• Usage Opportunity to Platform Map</li> <li>• Feed into annual MSA, PSD, PLBP</li> <li>• PPLC EU milestones to target platforms</li> <li>• Launch "Open Innovation" initiative</li> </ul>	<ul style="list-style-type: none"> <li>• End-User Program Office for cross-BU usage opportunities or opportunities with no clear BU landing zone. Route for ownership and investment assessment</li> <li>• BU-based opportunity assessment councils to evaluate and manage out-of-POR new opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Usage Manager: Accountable for ensuring platforms deliver to user experience</li> </ul>	<ul style="list-style-type: none"> <li>• Usage Opportunity Portfolio: Track opportunities from identification to platform inclusion</li> <li>• Opportunity Assessment Tool: Evaluate and articulate the value of new opportunities</li> <li>• Implementation Dashboard: Track implementation status for each BU</li> <li>• Investment models: Incorporate "non-traditional" investment models: short-funnel, ICAP-funded, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Next-level training for pilot teams</li> <li>• Broad-audience training on overall framework</li> <li>• Broad-audience Usage Model overview training</li> </ul>

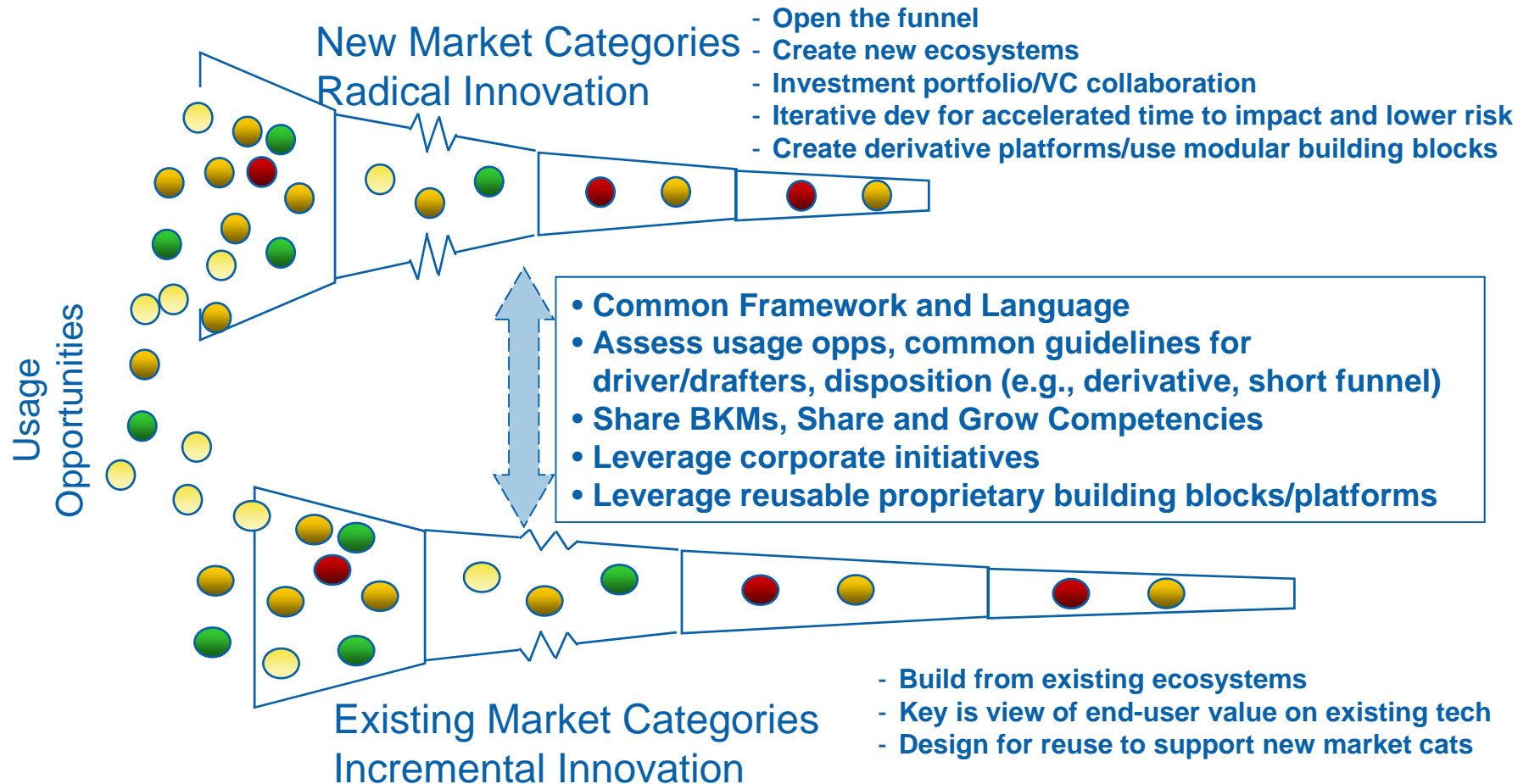
Challenges/Risks...1. Resources to deliver '06 MBO  
2. Organizational readiness to effectively drive accountability and linkage between EU, Strategic Planning, and Platform Planning

# BU implementation dashboard: Progress and status

Focus Areas	MG	DEG	DHG	DHeG	CPG	SMG	SSG
<i>'06 Plan in Place</i> (usages, platforms, deliverables)	Ex. 35% 						
<i>Framework Adoption</i>							
<i>Platform Impacts</i>							
<i>Roles Filled</i>							
<i>Forums</i> (identified and operational)							
<i>Training Delivered</i>							

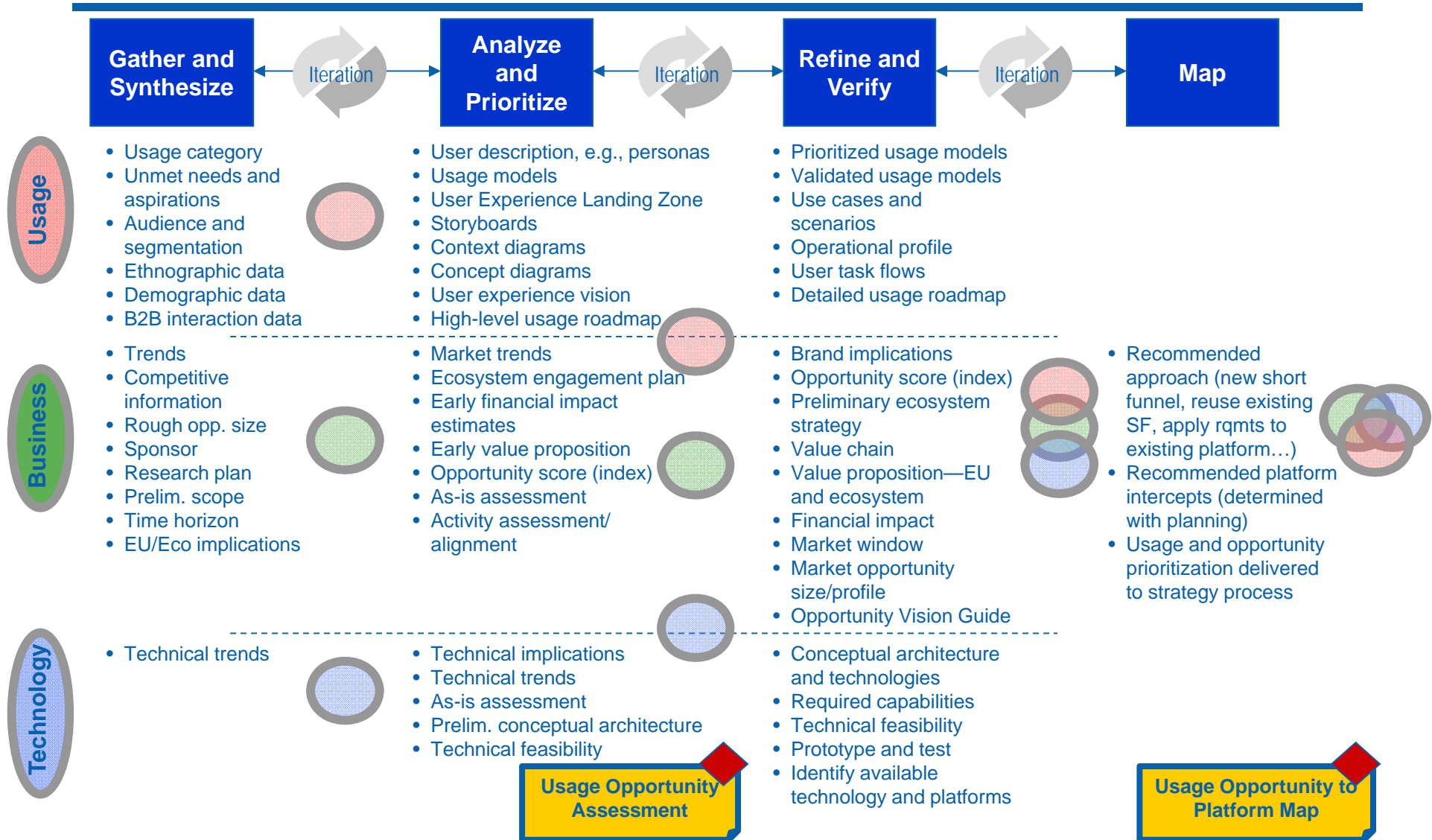
To be completed and tracked in '06

# '06 Vision and Execution...Driving User-Centered Open Innovation



Adapt framework for new markets and existing...driven with the ecosystem...positions <company> to Change the Industry!

# EU framework: Information content for each stage





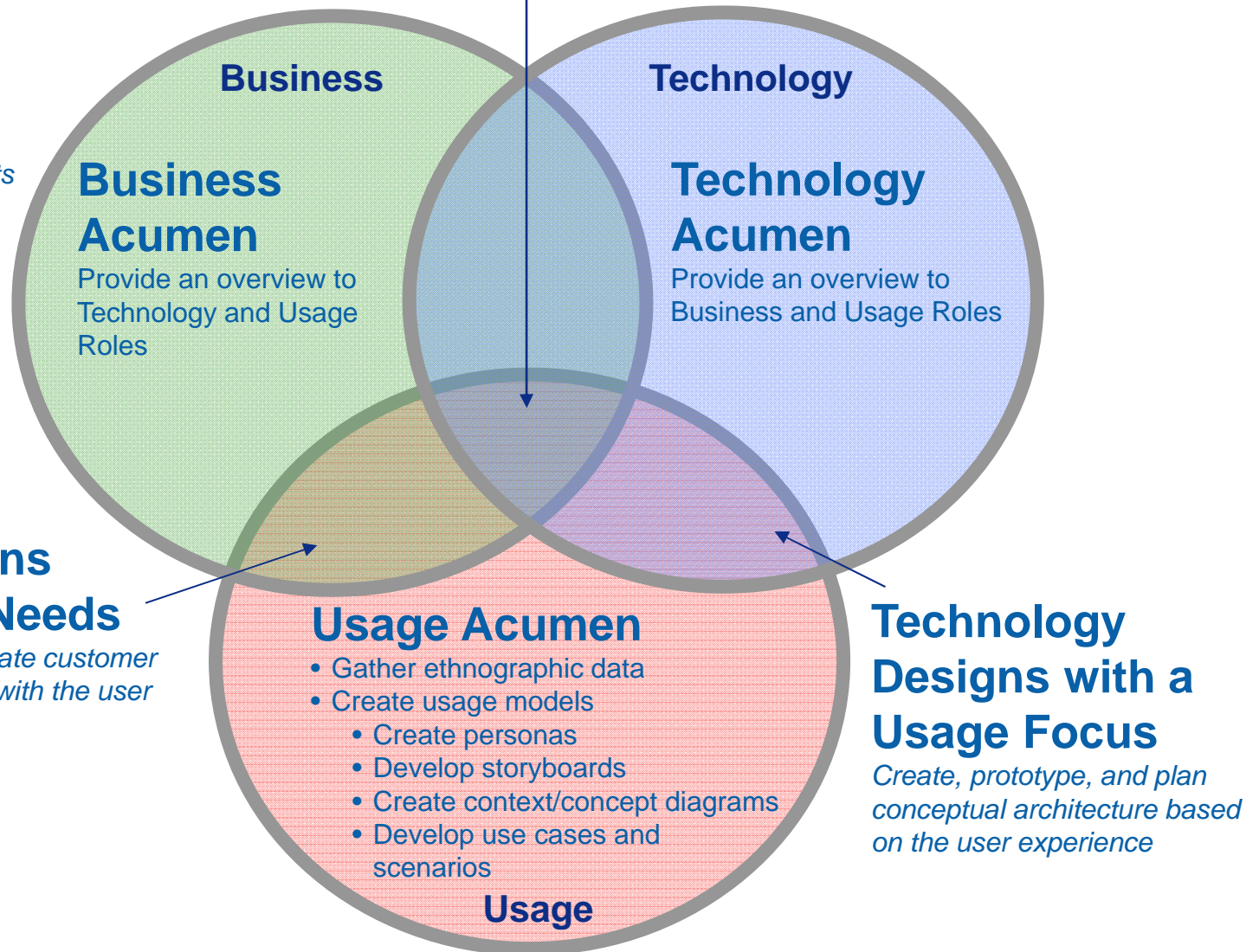
# Exploration Competencies

## Converged Platform Needs

*Translate needs from all three areas into platform requirements*

## Business Decisions based on Usage Needs

*Create a brand vision and validate customer requirements that synchronize with the user experience*

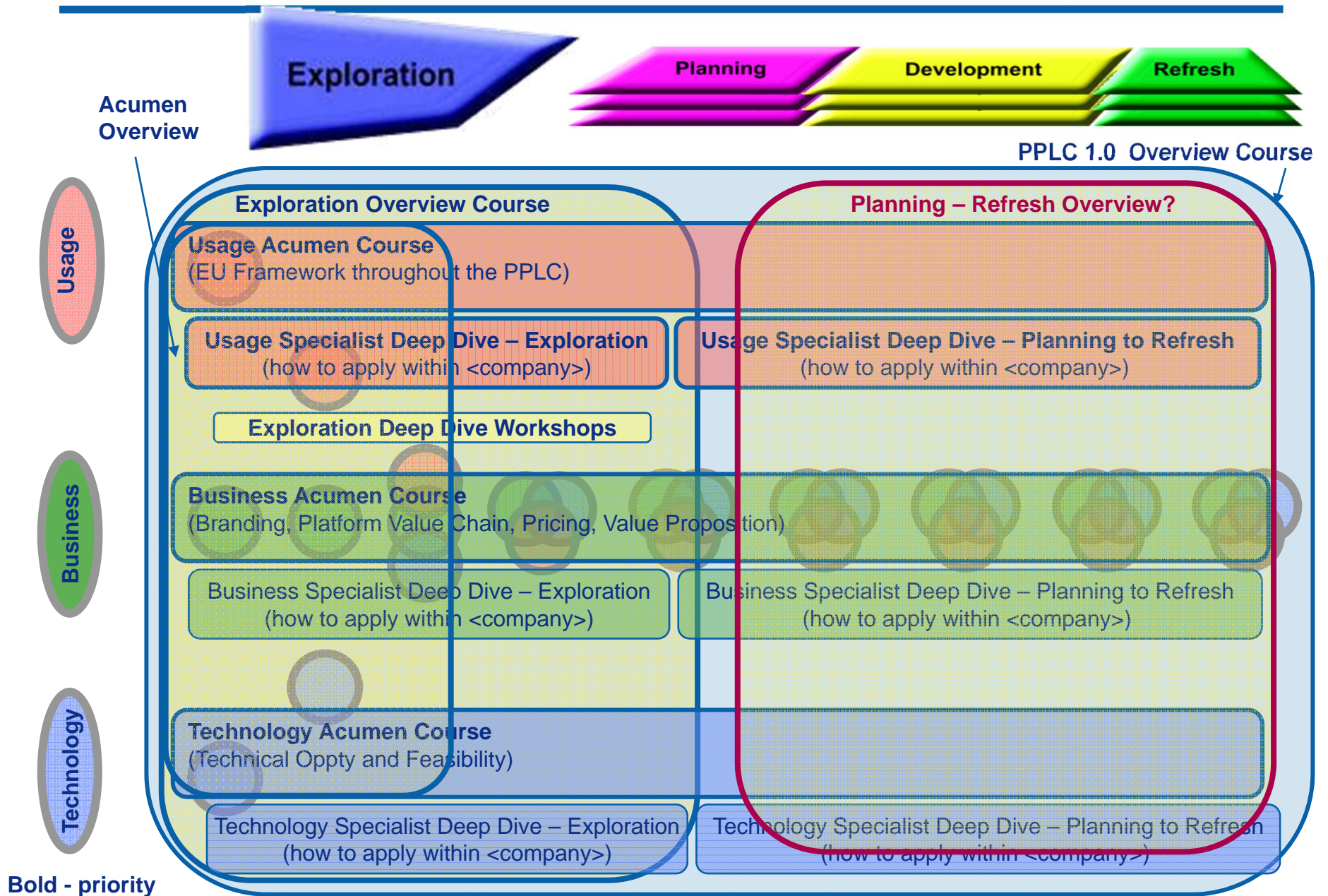


## Technology Designs with a Usage Focus

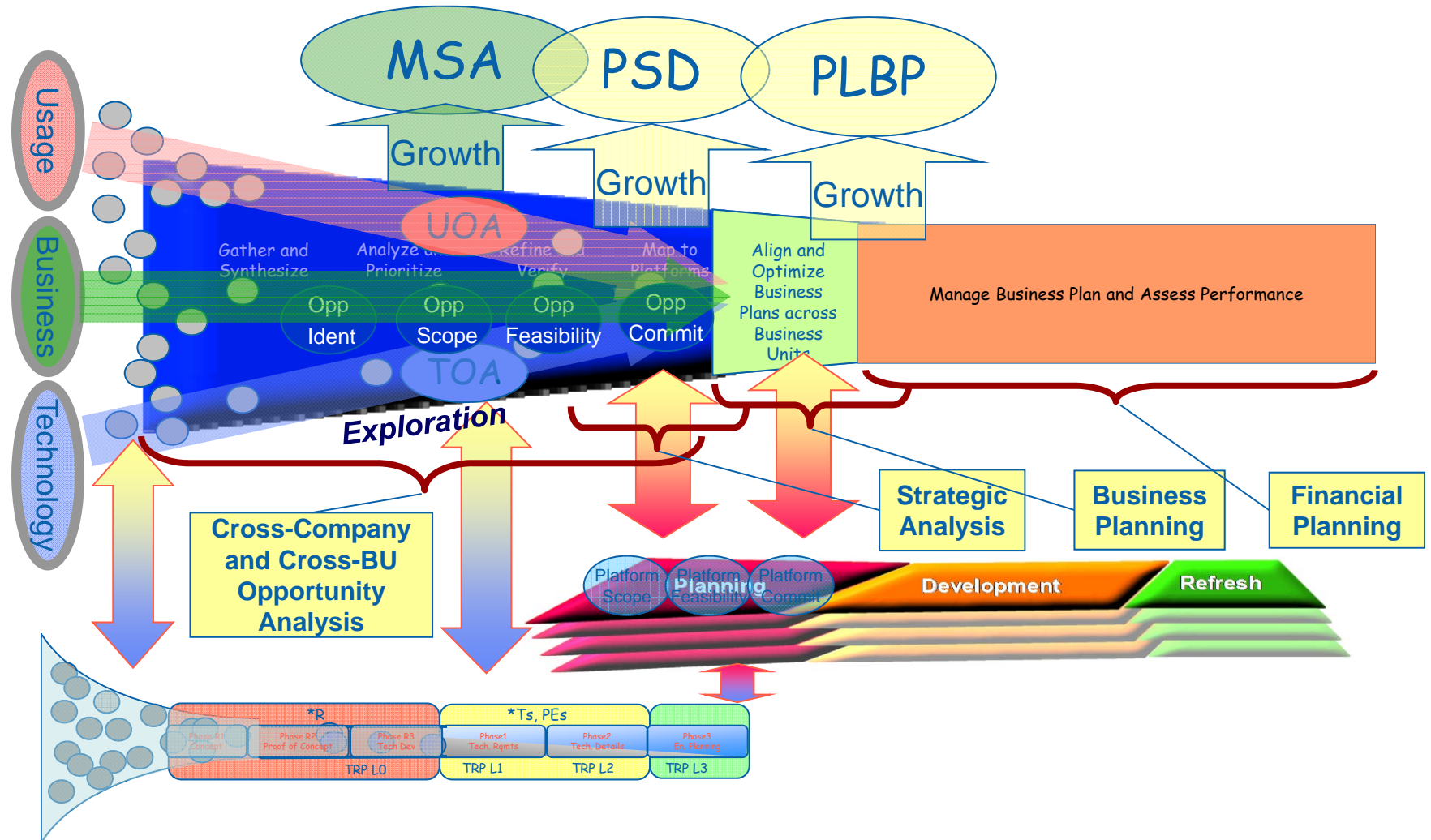
*Create, prototype, and plan conceptual architecture based on the user experience*



# PPLC and Usage Curriculum Map



# Linkage from Exploration to Corporate, BU, and Technology processes





# Goals and strategies

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## Goals

- Effectively drive usages into platform architectures and brand
- Focus on strategic cross-platform opportunities

## Strategies

- Facilitate cross-company collaboration, communication, and platform planning through consistent framework and language
- Adapt as we go: pilots; continuously assess and share business results and BKM
- Agile: improve visibility and focus, BUs drive and adapt
- Create an EU value-focused culture, e.g., competencies

## Plan – Q1 '06

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1. Execute expanded pilots for 10+ targeted usage areas to impact platform plans
2. Define and execute (organization, roles, forums, competencies, methodologies, tools, training, etc.)
3. Establish and manage BU opportunity pipelines

## '06 direction and plan

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1. Execute expanded pilots for 10+ targeted usage areas with specific business impact:
  - Execute key deliverables (UOA, UOPM, CRA,...) with demonstrable impact to platform plans
  - Execute opportunity assessment tool and use to set priorities and define usage roadmaps to feed into planning
  - Define and execute Phase 1 support infrastructure (organization, roles, forums, competencies, methodologies, tools, training, etc.)
  - Establish and manage BU opportunity pipelines
2. Identify and route key cross-company opportunities for platform impact
3. Deliver v1.0 Exploration framework, with guidelines for use
4. Execute user-centered innovation and ecosystem collaboration initiatives (e.g., IBM Open Innovation) to impact platform strategies and plans
5. Drive external and internal communications to increase awareness of shift to a user-centered platform approach

# Challenges

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Shortage of “user-centered” competencies: identifying human (non-technical) needs; usage modeling and translation to requirements

Disconnects between front-end work and platform planning

- Not clear how research roadmap is developed within ethnography groups, e.g., how is the roadmap linked to/driven by strategic priorities?
  - No way to get directed ethnography studies done (MG)—org would need to hire own ethnographers
- No neat “hand-off” points between early research and downstream use of it (DHeG)
- Affecting changes to POR very difficult

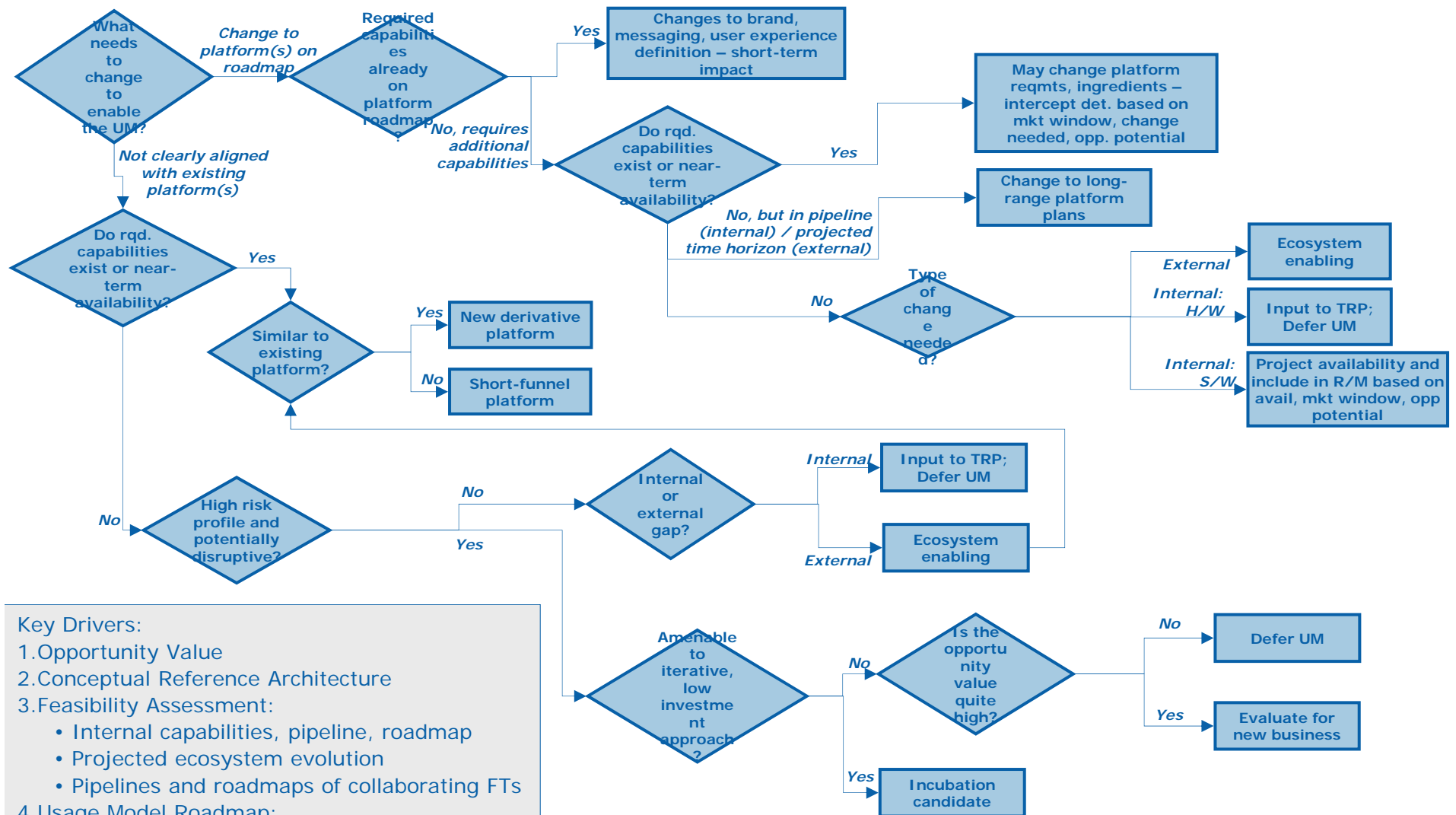
Role to own user vision and usage as platform moves from concept to release—HFE-trained usage champion through platform delivery

Challenge to make sure usage not seen as a magic bullet—or treated as a “check-box” item

Addressing cross-platform opportunities

Increase number of opportunities; engage the ecosystem

# Decision tree – platform approach (WIP)



## Key Drivers:

1. Opportunity Value
2. Conceptual Reference Architecture
3. Feasibility Assessment:
  - Internal capabilities, pipeline, roadmap
  - Projected ecosystem evolution
  - Pipelines and roadmaps of collaborating FTs
4. Usage Model Roadmap:
  - Based on #2 and #3:
    - When is the UM expected to become feasible in its first form
    - How is it projected to evolve over time?

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