

I2R Systems Stability: Transition to sustaining operations

September 25, 2006

Charter

Goal: *Improve systems stability for I2R tools – specifically in areas where outstanding issues are not being addressed*

Implicit Objective: *Prevent need for a future tiger team effort*

Charter:

- Monitor problems and outcomes
- Identify key issues not being solved through other means
- Drive improvements by forming initiatives to solve the problems

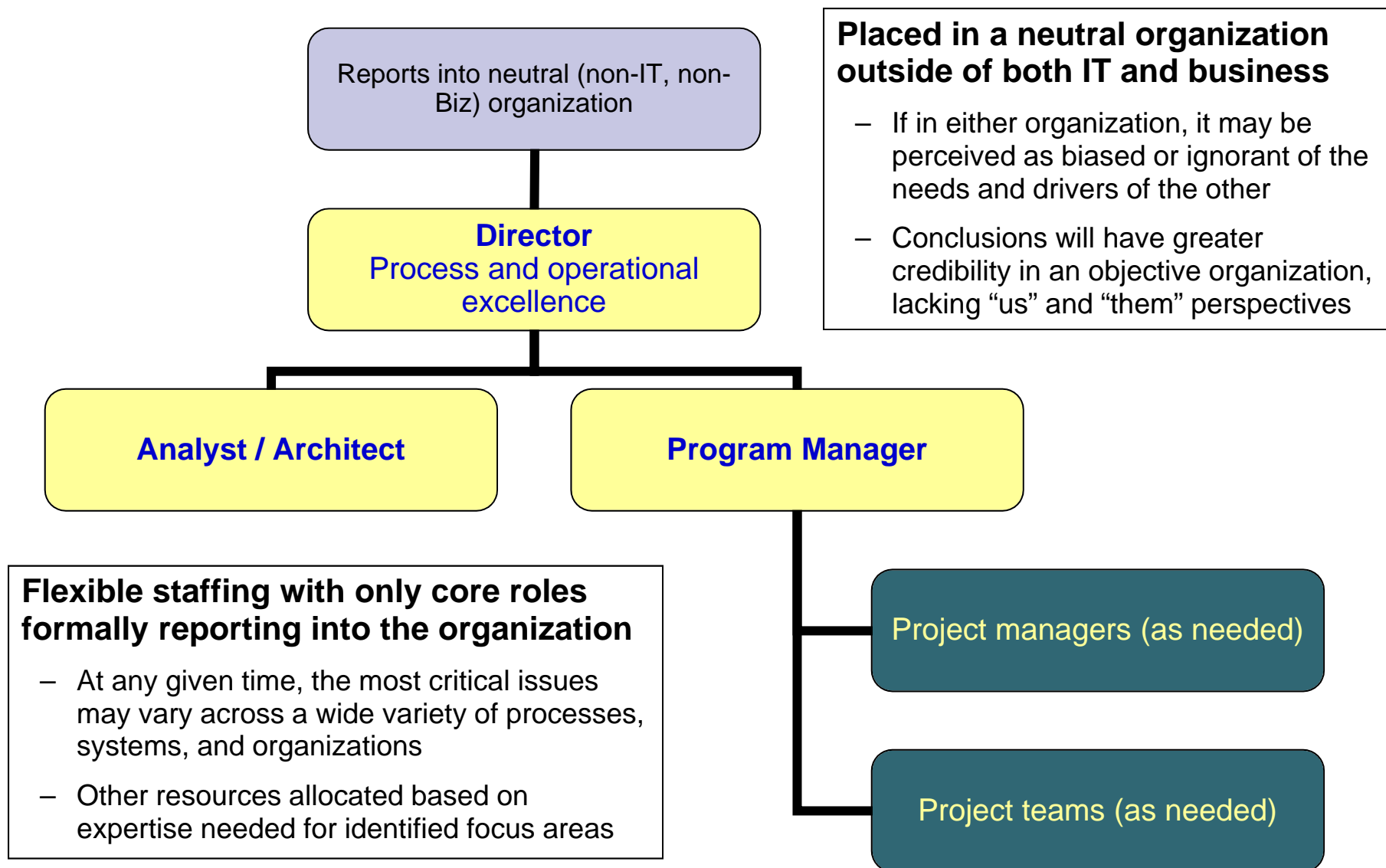
Scope

- **(In Scope)** Team may define initiatives in:
 - Business system policy or process definition or changes
 - Examples: Maintenance, prioritization, case response, release management, change control, communications
 - Technology improvements not being sufficiently addressed elsewhere
 - Training and communications to drive or improve adoption
 - Changes needed to improve accountability (metrics, incentives)
 - Insertion of changes into release schedules
- **(Out of Scope)** Team is not responsible for:
 - Day-to-day process execution, including reaction to production emergencies when they occur

Approach

- **Transform persistent tactical issues into solutions and action plans – and drive those plans to resolution:**
 - Continuously tap into a broad spectrum of practices, data, business outcomes, and business goals
 - E.g., Case history, RCAs, project post-mortems, interviews, metrics (project delivery, stability, performance, etc.),...
 - Synthesize inputs into key themes and emerging problems, measure the impact of those problems, and prioritize
 - Define action plans, including team needed, milestones, governance, and other critical enablers
 - Run the programs, measure results to identified gaps, and report outcomes to business and IT leadership
 - **Define consistent funding that allows for flexible resource allocation**

Organization structure



Critical enablers

- **Sustained executive attention, e.g., quarterly read-out to IT and business executives**
- **Top-down resource identification and allocation decisions; Executive involvement in identifying and obtaining best and brightest**
- **Resources dedicated for duration of their improvement tasks**
- **Sustained funding: Set up as expected initiative spending bucket every quarter / year**
- **Ability to tap in to expertise across the organization**
E.g., IT, business, CACO, QA, Infrastructure
- **Executive backing to drive improvements across different organizations**

Supporting details

Ongoing planning process

Annual Planning Process (end of fiscal year):

- Analyze current state and identify most critical issues
- Review business and IT goals and strategies for upcoming year
- Define rough plan by quarter for planned accomplishments
 - Improvements are sized to complete within quarterly windows
- Review plan with senior IT and business executives; adjust plan
- Define resource plan and obtain budget approval
- Set Q1 MBOs for team

Quarterly Planning Process (end of each quarter):

- Review upcoming quarter plan and current state
- Tune plan for upcoming quarter and rest of year
- Review accomplishments and plans with senior IT and business executives; finalize plans for upcoming quarter
- Get teams in place for the quarter's scheduled improvements
- Plan projects and set MBOs

Resources needed

- **Director**
- **PM**
- **Analyst / Architect**
- **Change control: 3 FTEs for three months**
- **Case management: 3 FTEs for three months**
- **Six to ten FTEs per quarter ongoing (subject to annual and quarterly plan definition)**
- **In addition, Tiger Team resources stay in place for Performance track through March release**

Executing the transition

Transition

This New Team's Q2 Focus Areas:

- **Change management and case management (continuing efforts from Tiger Team)**
 - **Training and handoff is responsibility of tiger team track leaders to this new team**
- **Performance track stays as a tiger team through the March release – it is not a sustaining team**
 - **This approach is necessary to ensure appropriate resources and air cover**
- **Q3 focus areas to be determined during Q2**

Transition Steps

- 1. Define continuing members of change and case teams (Oct 2)**
- 2. Obtain approvals, funding, backfills as needed for the team members to assume their roles (Oct 16)**
- 3. Make organization changes to form the new organization and place permanent members there (Nov 20)**
- 4. Director and PM in-place and up-to-speed (Nov 20)**
- 5. Change and case team hand-offs to sustaining organization (Nov 20)**
- 6. Define Q2 work plan (Nov 27)**
- 7. Announce the new organization (Dec 1)**

Backup

Organizational approach

- **Flexible staffing**

- At any given time, the most critical issues may vary across a wide variety of processes, systems, and organizations
- Based on identified focus areas, the subject matter expertise needed on the team will vary widely
 - E.g., technical resources for stability improvements, process best-practices, deep business understanding
- Only the consistently needed roles will report in to the sustaining organization – others will be allocated as needed

- **Placement**

- The organization must be outside of both IT and the business
- If in either organization, it may be perceived as biased or ignorant of the needs and drivers of the other
- The conclusions will have greater weight and credibility in an objective organization, lacking “us” and “them” perspectives

Objective

Prevent the need for a future tiger team effort by taking the initiative in identifying and tackling critical problems to be solved so that issues do not accumulate over significant time periods and become expensive, time-consuming, and difficult to solve

Drivers

- **The system stabilization program is intended to be a short-term, focused, well-resourced team responsible for making critical, tactical improvements to system stability**
- **The team's objective is to drive improvements that would not be addressed without the focus, resources, and sponsorship of a tiger team initiative**
- **There will be some improvements remaining after the Tiger Team's work is complete – these improvements are more appropriate to a sustaining organization**
- **We are now working to define the charter and structure of the sustaining organization, which we are calling the Operational Excellence (OE) or Continuous Improvement (CI) team**

Defining the transition

- **We have reviewed the Tiger Team action plan and defined:**
 - The activities that require Tiger Team focus**
 - The exit criteria for each team to transition to continuous improvement**
 - The estimated time frame for each team's transition out of "Tiger" mode**
- **The Performance track will remain in "Tiger" mode longer than the other tracks, due to the following factors:**
 - Release and QA lead times involved in making system changes**
 - The need to slot major changes into major (non-tactical) releases**
 - The number of issues / improvements to be addressed by the team**
- **The transition criteria for each team and the program are defined on the following slide**
- **Resources have been churned significant for the change and case teams; their transition ETAs may be revised after the resource transition period**
- **The charter and structure of the continuous improvement team will be defined during the latter half of September**

Transition criteria and expected timing

	Items Requiring Tiger Team Focus	Tiger Exit Criteria	Continuous Improvement Tasks
Change Control	<ul style="list-style-type: none"> • Implement Risk Analyst role • Define / implement change class governance • Define / implement Non-I2R tools approach 	<ul style="list-style-type: none"> • Items at left complete • Owner for change process and ongoing monitoring defined • Process communication and training complete 	<ul style="list-style-type: none"> • Measure / monitor results • ETA: 8 weeks from now (Nov 13)*
Case Management	<ul style="list-style-type: none"> • Implement improved stability reporting • Resolve priority discrepancies • Identify improvement plan and implement quick-win improvements • Include Top X tools in reporting and RCA/LTF processes 	<ul style="list-style-type: none"> • Items at left complete • Owner / team for continuous improvement defined 	<ul style="list-style-type: none"> • Implement longer-term improvements • Conduct ongoing measurement and monitoring • ETA: 8 weeks from now (Nov 13)*
Performance	<ul style="list-style-type: none"> • Implement most critical improvements as well as a significant body of the improvements (e.g., major, non-tactical fixes) 	<ul style="list-style-type: none"> • Items at left complete • Prioritization process in place to ensure LTFs included in releases • Ongoing performance management team in place 	<ul style="list-style-type: none"> • Conduct ongoing monitoring and improvement • ETA: Post March release
Program	<ul style="list-style-type: none"> • Ensure program on track to achieve goals • Measure/report progress-to-goals • Define continuous improvement transition (timing, charter, team, etc.) 	<ul style="list-style-type: none"> • Prioritization process in place to ensure LTFs included in releases • Measurement and monitoring instituted for items not requiring new technology • Continuous improvement team in place 	<ul style="list-style-type: none"> • Conduct ongoing stability and performance monitoring and improvement • Conduct periodic re-analysis of case history

** Given resource changes, these estimates will be reviewed in a few weeks*