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IT CS Support Strategy Update



26 May 2010

Objective and agenda

- Meeting objective:

Confirm to-be accountability and decision model

- Agenda:

- Progress summary
- Challenges
- For discussion: Accountability and Decision-making



Progress summary

Complete: Some “Little Wins”

- ✓ Began discussions with key players across organizations
- ✓ Identified issues due to org changes, disconnects, and accountability ambiguity
- ✓ Identified and added key parties to revised incident communications structure
- ✓ Began engagement with CS – discussing escalation, decision authorities, QE processes
- ✓ Identified Performance Management current capabilities and gaps; identified focus areas
- ✓ Identified ownership of tools where unclear; identified actions to correct information

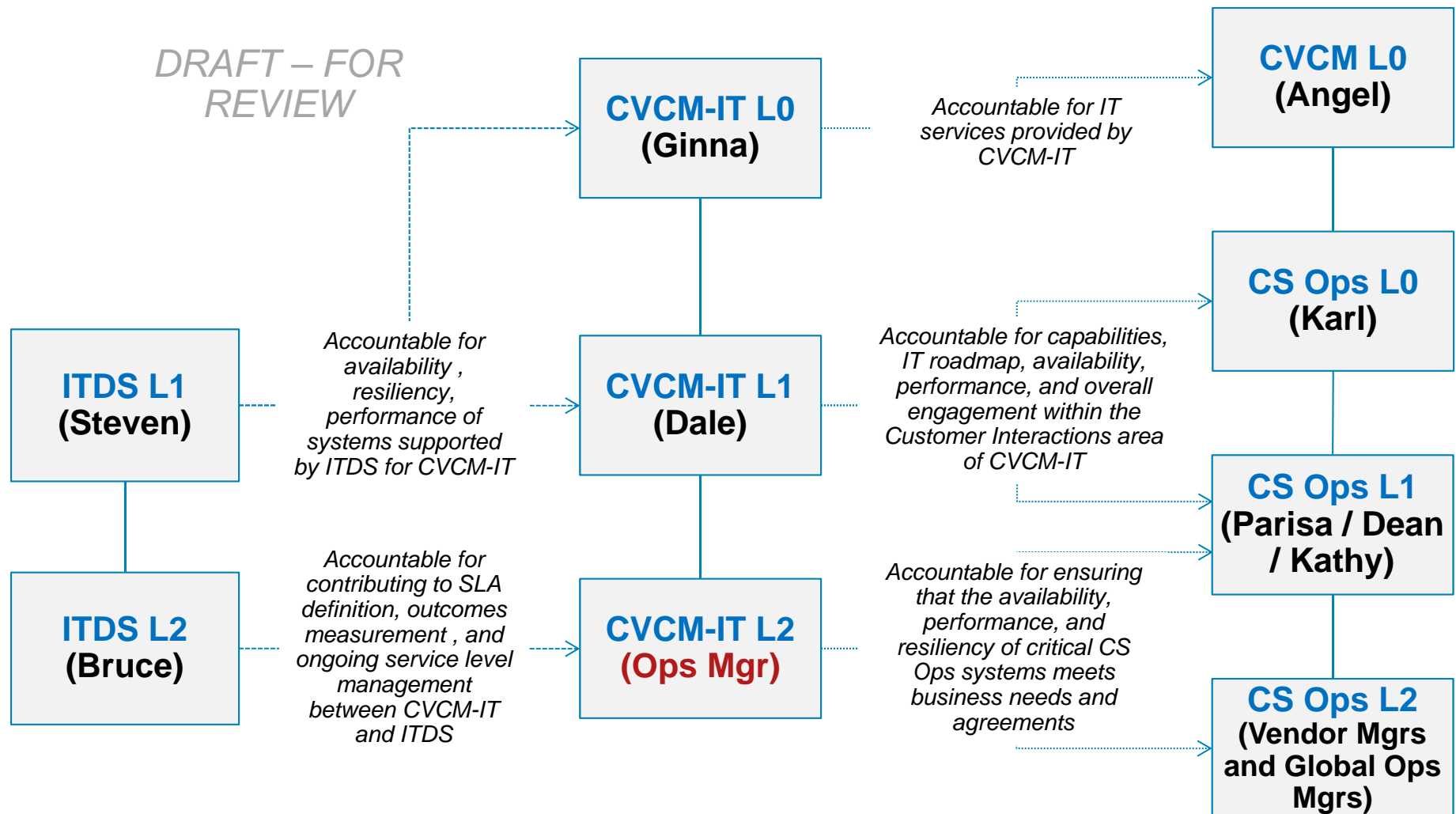
Pending: The “Big Wins”

- Ⓡ Confirm accountability model - *TODAY*
- Ⓢ Finalize list of authorized case “escalators” with CS
- Ⓢ Provide improved, holistic support process materials to CS business
- Ⓢ Post accountability, decision, escalation, comms material to wiki
- Ⓢ Compare business priority for tools to IT priorities; address gaps
- Ⓡ Revise EMAN, AP information to reflect correct ownership, accountability
- Ⓢ Formalize Performance Mgmt strategy and business case
- Ⓡ Define the SLAs among the organizations

Challenges

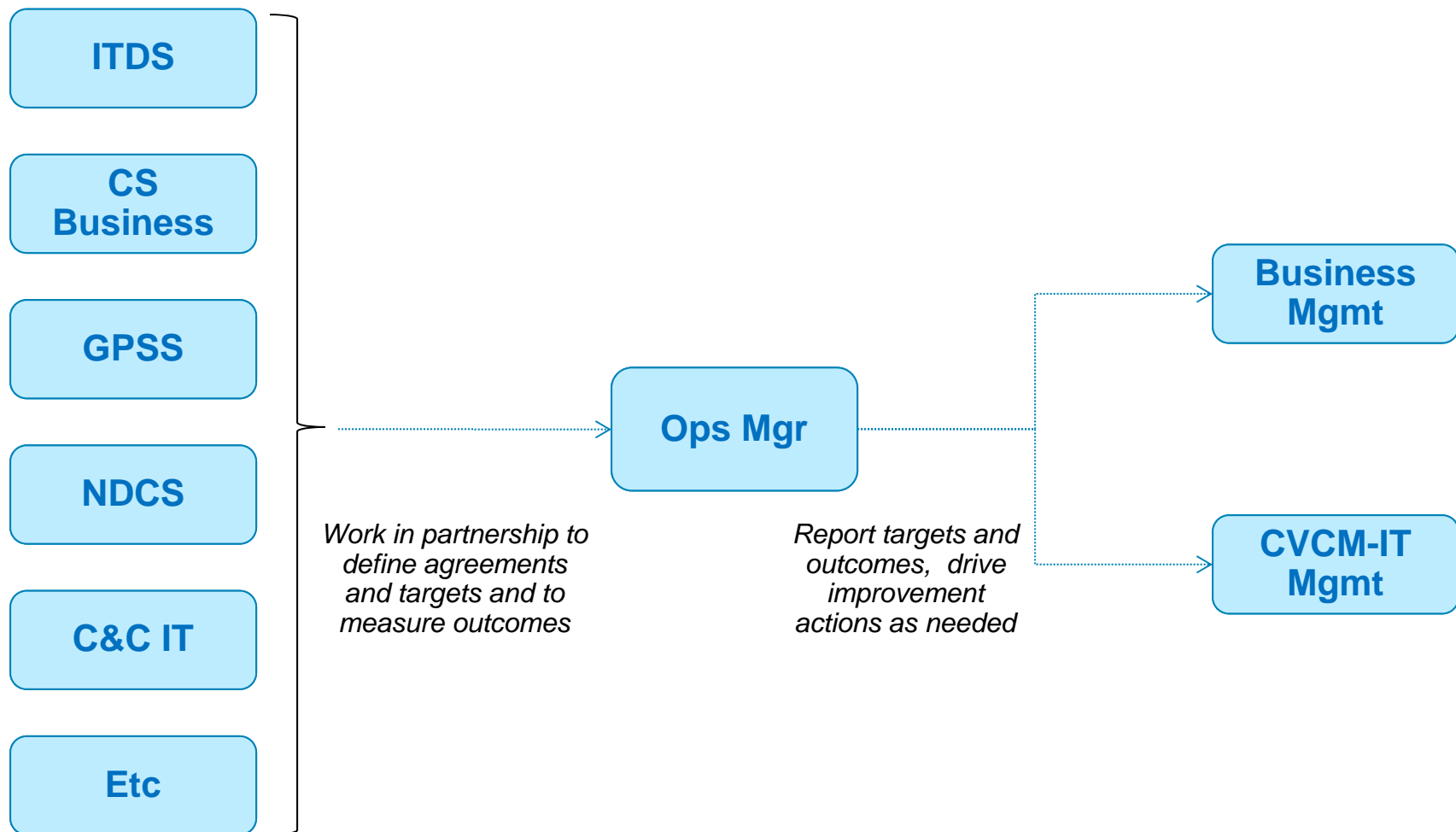
Challenge	Program Impact(s)	Action / Decision Needed
1. Lacking <i><company deleted></i> “skin in the game” – time / resource allocation	<ul style="list-style-type: none"> • Lost traction and “top of mind” status due to quarter-end and Ops Review activities and other factors • Not enough time on people’s calendar to keep things moving as rapidly as planned • May not complete all items in Q4 	<ul style="list-style-type: none"> • ACTION: Bring on Ops Mgr and make this initial near-FT focus • ACTION (Team): Identify if any means to make better forward progress given constraints • DECISION: Any other actions needed to obtain resource availability at levels planned? What should we do about current level of ITDS participation?
2. Organizational changes and realignments	<ul style="list-style-type: none"> • Changes within GPSS regarding support alignment and ownership add complexity to discussions and resolution • Some degree of friction and frustration among various players and teams – not helped by recent lack of time 	<ul style="list-style-type: none"> • DECISION: Is there a rationale for having a consistent definition of role/boundaries/accountability between: <ul style="list-style-type: none"> • ITDS outsourced support • GBP IT staff engagement with the business organization and management

Proposed **Customer Ops** accountability model, with incoming Ops Mgr role



Ops Mgr role: Cross-functional engagement

Cross-functional teams



CS-impacting incident decisions and notifications

Scenario	ITDS: Steven Smith	CVCM-IT: Dale Chapman	GPSS: Arvind Bedi	CS Ops Theater Leads	CS Biz: Parisa / Karl / Dean / Kathy	QTC Biz: Sesh T.	Outage Alias*
No issues (QE only)	QE: I	QE: I (plus Ginna's mgrs)	QE: I	QE: I	QE: I	QE: I (Copy to Steve Martino, Jay Joiner)	QE only: Daily update
> X quotes/orders stuck	NA (normal escalation process)						
Unplanned outage or performance degradation	I	I	I	I	I	I	I
Emergency change or outage required	D (CVCM system)	D Ops Mgr as designated alternate	D (GPSS system)	(May contact off-US- hours)	D Sean as alternate contact (no delegated decision authority)	?	NA
Outage / performance updates	I (on change in status)	I (on change in status)	I (on change in status)	I (on change in status or every 90 mins)	I (on change in status or every 90 mins)	I (on change in status or every 90 mins)	NA
Outage / performance resolution	I	I	I	I	I	I	I

I: Recipient of communications with relevant Information
D: Requested to make/approve a Decision
N/A: No direct interaction / communication

Update with
Kathy H.

*Mailer alias used for CS: **it-escalation-alert**
 *Mailer alias used for iFax: **ifax-ops-comms**

Next steps

- (Dale, Melissa) Meeting with Kathy Harrington, Dean Schiavone:
 - Introductions, plans for improvement in support engagement, incoming Ops Mgr role, etc.
 - Targeted for June 8 or 9 to fit around Dale's and Melissa's PTO schedules
- (Dale) Discussion with Steven on ITDS participation
- (Dale, Melissa, others) Onboard Ops Manager and continue efforts on Support Optimization



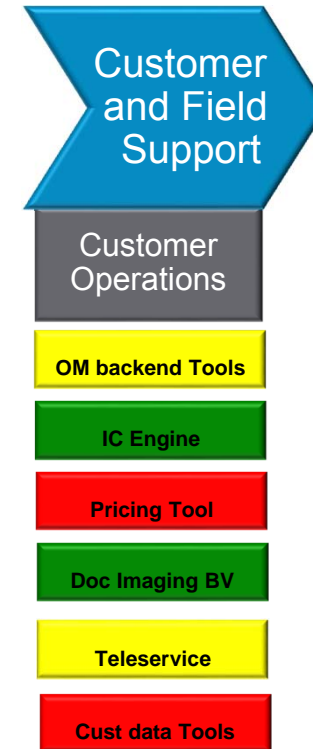
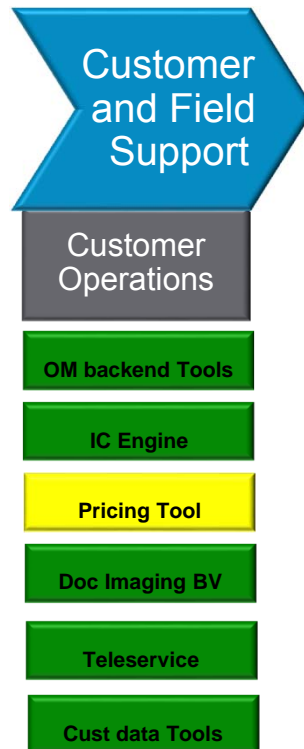
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Backup Slides to Follow>

Availability...CVCM-IT Owned Tools

Direct Availability: CVCM-IT Tools
Based on CVCM-IT Ownership

Indirect Availability: CVCM-IT Tools
Based on additional impacts from underlying infrastructure

Q3



Key outages include two network outages affecting CSR sites (total 12 hrs duration)

Legend

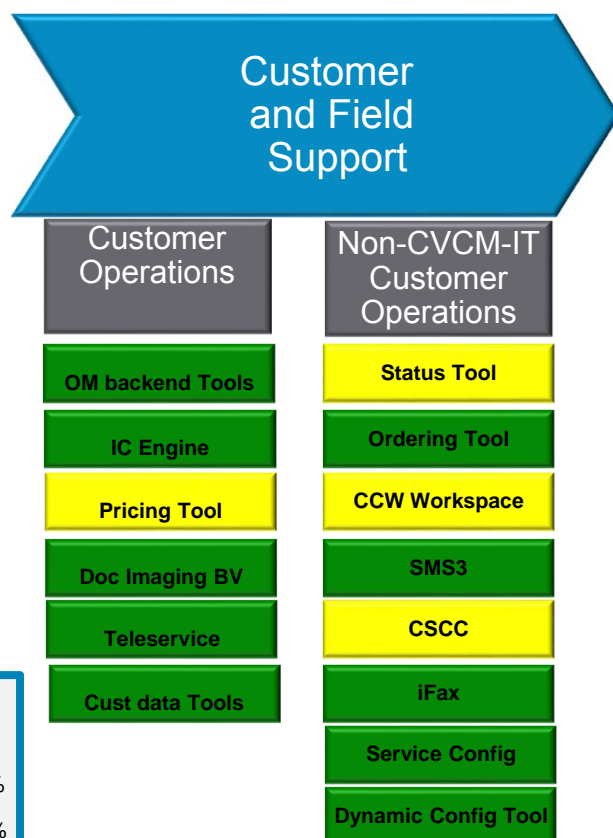
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Quarter-end Support

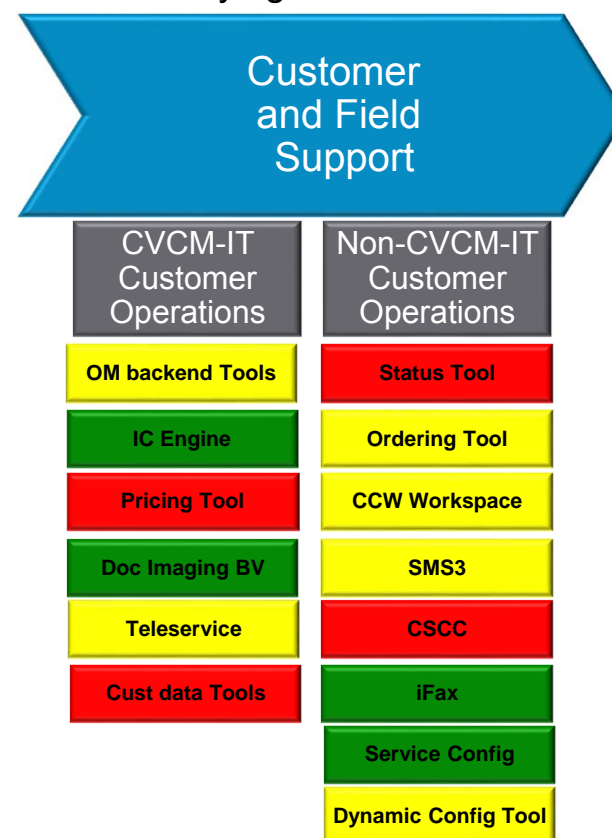
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Availability: Business experience

Direct Availability: Customer Ops Tools Based on CVCM-IT Ownership



Indirect Availability: Customer Ops Tools Based on additional impacts from underlying infrastructure



Key outages include two network outages affecting CSR sites (total 12 hrs duration)

Legend

	No Data
	Below 99.099%
	99.1%-99.499%
	99.5% – 100%

Quarter-end Support

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Progress

Accomplished	Not Yet Accomplished
<u>Incident Management Communications</u> <ul style="list-style-type: none"> Identified as-is incident comms and proposed to-be structure for CVCM-IT Worked with business to define needed recipients of incident management comms; implemented (CVCM) 	<ul style="list-style-type: none"> Some additional revisions to mailers Ensured GPSS comms also include them (info sent)
<u>IM Training and Org Adoption</u> <ul style="list-style-type: none"> Discussed quarter-end and normal case escalation means, aliases, and response times with CS ID'd that CS OA materials (CIC, etc.) need to be revised 	<ul style="list-style-type: none"> Make sure that info is cascaded to users; biz is still using order/quote aliases to escalate incidents Work with CS to get those materials updated
<u>Incident Management Decision and Escalation</u> <ul style="list-style-type: none"> Identified appropriate approvers (IT & biz) for incident resolution actions that impact critical systems Received authorized business "escalators" from biz 	<ul style="list-style-type: none"> Confirmed that those paths are executed correctly non-QE situations; revised per org chgs Confirmed order vs incident escalators
<u>Reporting</u> <ul style="list-style-type: none"> Identified first-pass critical tools Realigned key reporting views to attempt to show business views not "IT buckets" 	<ul style="list-style-type: none"> Completed alignment of priority levels with biz "Shaken out all the bugs" yet in the transition – will take a few quarters / ops review cycles
<u>Business Engagement / Alignment</u> <ul style="list-style-type: none"> Conducted fruitful pre-QE discussion with CS and planned further engagement 	<ul style="list-style-type: none"> Gotten significantly further in the engagement nor deliverables (Org Adoption, SLA, etc.)
<u>Critical Systems</u> <ul style="list-style-type: none"> Confirmed current support ownership & misalignments Received list of systems in use by CS sites and theaters Confirmed EMAN changes needed 	<ul style="list-style-type: none"> Received current biz priority info (WIP) Completed check of biz priority against EMAN priority Confirmed & implemented EMAN/AP to-be settings based on planned accountability model and org chgs
<u>SLA / SLM</u> <ul style="list-style-type: none"> Conducted preliminary discussions Discussed performance mgmt as-is and to-be 	<ul style="list-style-type: none"> Made progress yet in formal definition Confirmed plans for holistic perf mgmt

Key milestones – *DRAFT*

Missing: Alignment with metrics dashboard work

- Align how we report (e.g., at IT and biz Ops reviews) to systems / components and outcomes (incidents, availability, performance, LTF back-log ...)
- Key Ops review dates

Legend:

- Intermediate milestone
- Key leadership reviews
- Process change delivered

Week starting:

Apr 12

Apr 26

May 10

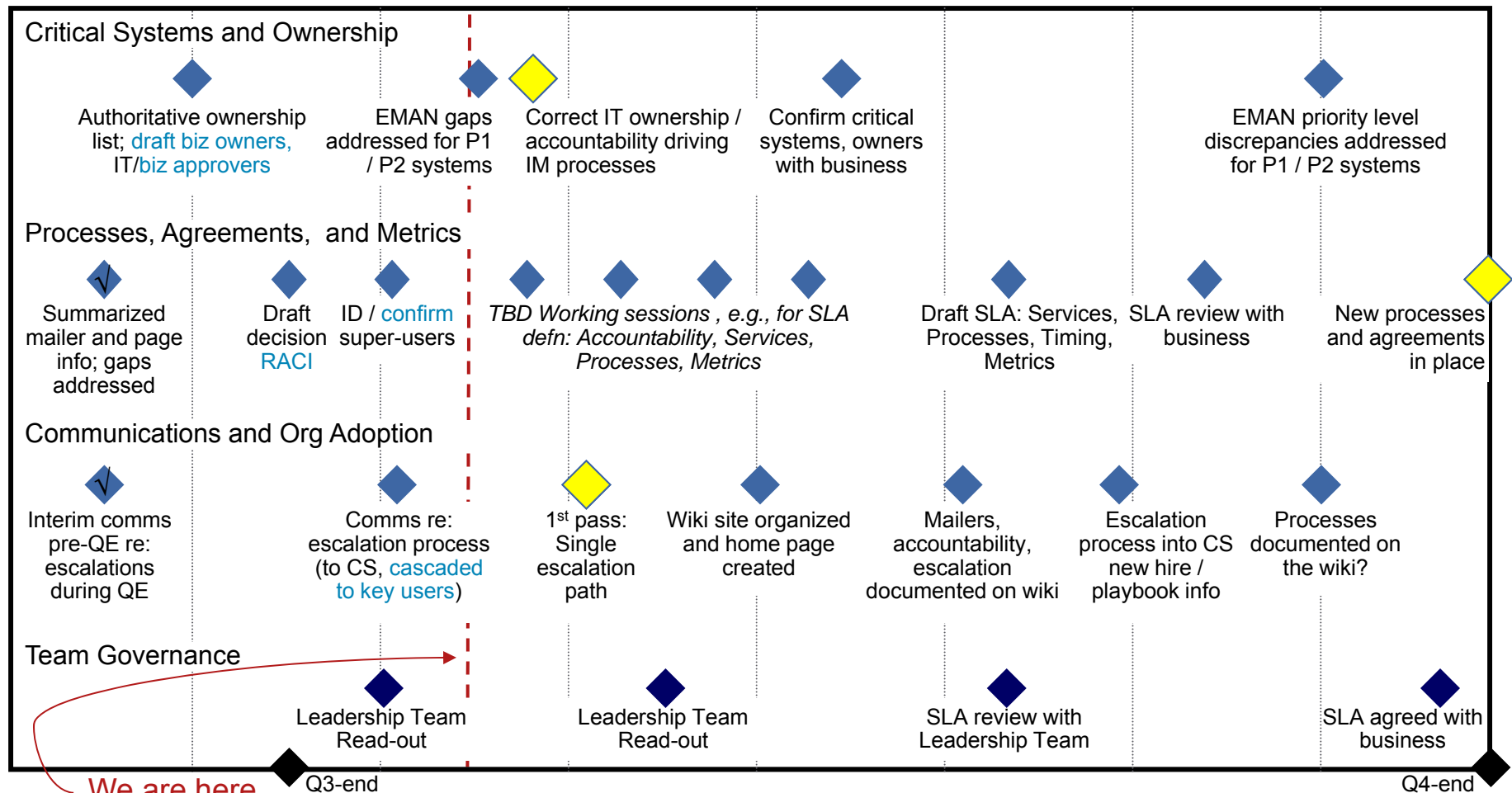
May 24

Jun 7

Jun 21

Jul 5

Jul 19

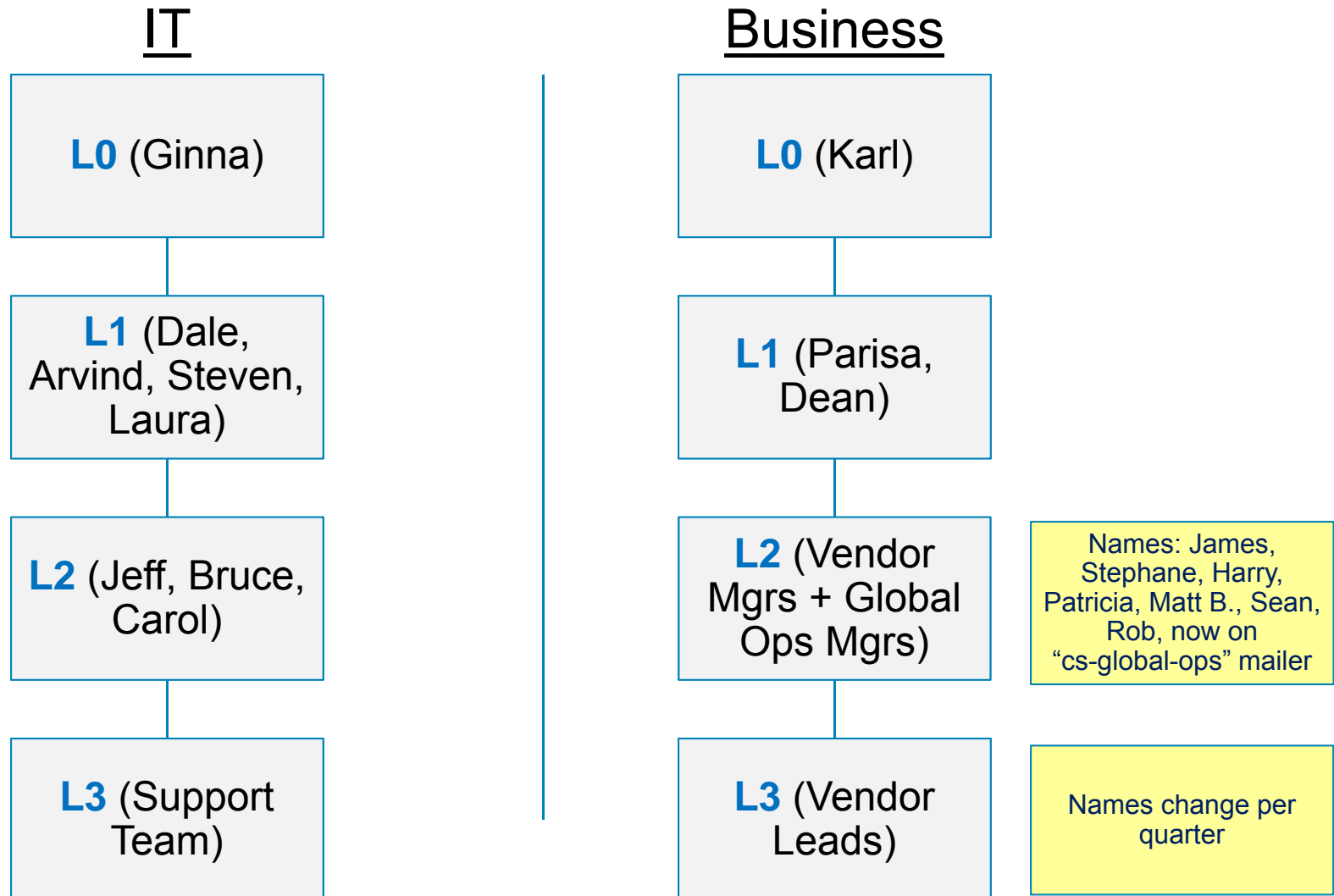


Background and problem statement

- Project started after issues in case handling, communications, and decision-making – and flagging business confidence in IT support
- Issues stem from changes in IT organization structure and support...
 - BSOS used to provide “one face to IT” for Customer Operations
 - Now we have the old BSOS team plus CVCM-IT, ITDS for CVCM, ITDS for GPSS, and C&C IT all providing support for CS critical systems
- ...as well as disconnects between IT and business
 - Incorrect case escalation paths, missed people on communications aliases, IT reporting not aligned with business views, etc.

The goal of the planned “Tiger Team” was to define and execute a “Get Well” plan that will reassure the CS business and regain its confidence

From QE discussions: Chain of command for CS systems



Accountability model options

Option	Pros	Cons
1. Each individual IT organization provides support to CS business directly, only for systems within their ownership; no one is responsible for end-to-end support for CS or for the overall IT/CS relationship	<ul style="list-style-type: none"> • Simplest support structure for IT • May be “least cost” for IT, since no role(s) need to create appearance of cohesive IT support, nor provide holistic outcome / metrics information 	<ul style="list-style-type: none"> • Most complex for CS • Multiple contacts to resolve issues • Puts burden on the business of trying to figure out state of IT/systems for them • May increase business costs, e.g, by putting more work on them, or by extending outage times when issues mis-routed • Usually will hold “IT” responsible for the overall picture in some way anyway
2. As the centralized support function, ITDS is accountable for end-to-end support provided to the CS business as contracted with CVCM-IT	<ul style="list-style-type: none"> • Single point-of-contact to CS business • Provide abstraction of details of IT support structure / ownership to provide holistic support and metrics 	<ul style="list-style-type: none"> • Not provided currently • Creates confusion regarding whether CVCM-IT or ITDS is the primary IT organization for CS – “who is whose customer?” • May not be well aligned with competencies • May not be well aligned with inclination to continually reduce costs from that team
3. CVCM-IT is accountable for delivering end-to-end IT support services to CS business ; ITDS plays a role in delivering <i>some aspects</i> of that support as a sub-contractor of CVCM-IT on behalf of CS business	<ul style="list-style-type: none"> • Clarifies the IT support value chain: CS is CVCM-IT’s customer; CVCM-IT is ITDS’s customer • Clearer division of accountability between ITDS and CVCM-IT 	<ul style="list-style-type: none"> • Not clear that ITDS organization supports this model • Neutral with respect to effect on GPSS friction among support teams – support model & accountability may be a broader problem outside of this organization and this business constituency

Operations Manager – CVCM-IT

Summary:

Front-office business client **engagement**, strategic **planning**, and operational **leadership** around incident management (IM), problem management (PM), and service level management (SLM)

Roles and Responsibilities

- Partner with Customer Operations business to optimize support practices to align with evolving business needs
- Develop mature client-facing support capabilities, including proactive monitoring & resiliency, metrics alignment, and SLAs
- Manage key partnerships and hand-offs with central support services (ITDS) and other IT ecosystem players
- Partner with business and ITDS to prioritize long-term fixes and ensure key problems are addressed
- Provide escalation support for high-visibility issues, including client-facing leadership, executive comms, decision-making, and orchestration across IT ecosystem as needed
- Advocate for supportability of new ordering/booking features and capabilities introduced through initiatives

Deliverables

- Quarterly Ops Review presentations to business client management summarizing support outcomes (metrics), key issues, and action plans related to IM, PM, SLM areas
- Documented agreements (definition and maintenance) with the business and among IT organizations to support delivery of proactive support/maintenance services and to align IT metrics with business drivers
- Executive / management communications (issue, impact, action plans, decisions needed, estimated resolution time, etc.) for broad-impact, high-visibility issues
- Input to quarterly planning processes to address funding and/or resource issues as needed to deliver to agreements and needs

Experience and Knowledge

- Ten years of experience in IT, including operations
- Knowledge of customer service and support processes and operations
- Business functional experience and/or business degree (undergraduate or MBA)
- Experience preparing and delivery clear, professional, high-quality communications for upper management
- Experience with IT SLA definition, metrics definition, Six Sigma DMAIC processes helpful
- Cross-functional team leadership experience (e.g., within a program or project management role) preferred

Skills

- Excellent communication skills overall
- Polished, professional presentation materials and delivery suitable for executive audience
- Clear, concise, business-relevant email communications
- Ability to translate technical metrics, issues, or impacts into business-relevant, executive-targeted verbiage
- Strong ability to influence others, irrespective of organizational alignment or level within an organization
- Understanding of ITIL process definition and terminology
- Professional, “executive” presence capable of inspiring business confidence

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IT Support Optimization



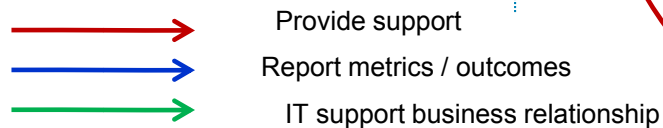
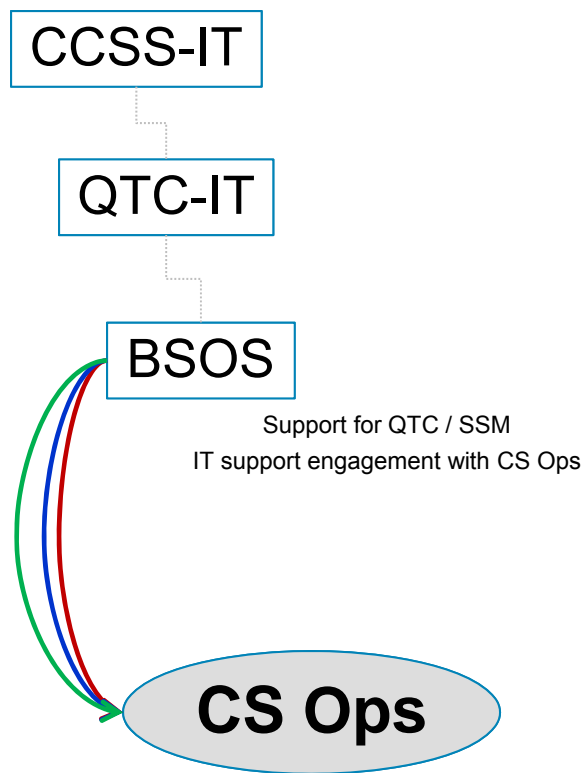
Working Team Read-out
April 7, 2010

Meeting objectives

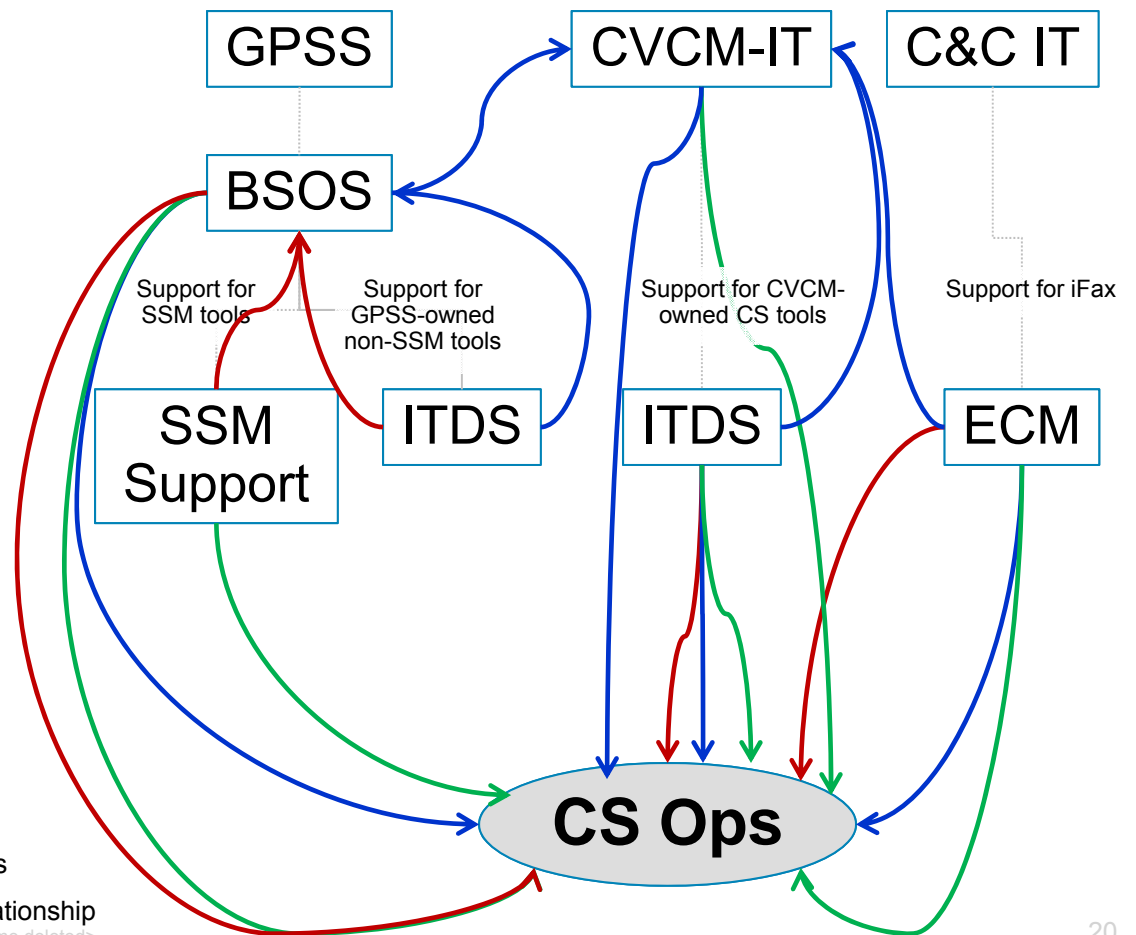
- Review output from last week's assignment:
 - As-was and as-is organization, roles, processes
 - Gaps
 - Recommendations for next steps
- Confirm decisions and next steps

Organization – then and now

Then

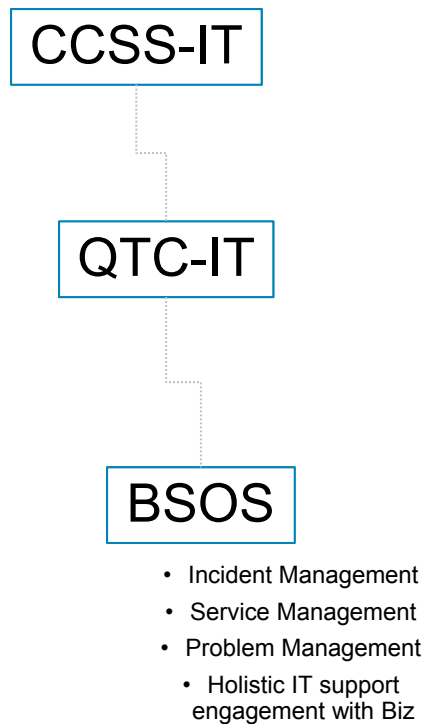


Now

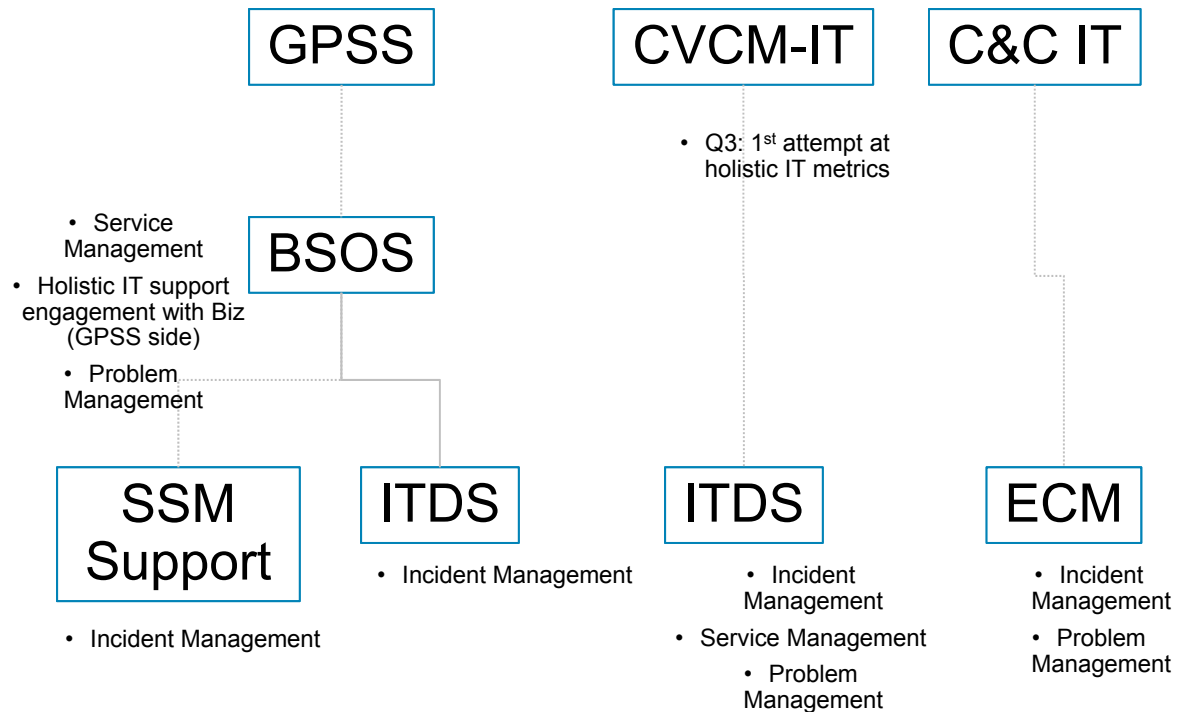


Roles – then and now

Then



Now



Incident Management processes – then and now

- At the lowest level, largely the same players, same IM process
Key variations noted below
- Communications:
Same mailer alias used by both teams; duplicated communications
Some players not on the aliases
Informal means (tacit knowledge to “cc Bruce” or “page Dale”)
- Escalations:
Old BSOS process (page “bsos-duty” to escalate P1/P2)
Use the BSOS order/quote escalation alias to try to escalate a whole-site issue
Call BSOS folks directly (whether GPSS or CVCM issue)
ECM process (uses <company domain>.com case escalation tool)
CVCM-IT systems: Generic GTRC process?
“Call Dale”
- Decision-making:
Not clear who needs to approve which decisions with current structure?

Gaps

- Errors in case routing

BSOS catching some cases that belong in CVCM and having to re-route to CVCM ITDS team and vice-versa

Creates delays for case resolution (up to 2 hrs on high priority; up to 2 days on lower priority)

- Multiple case escalation paths

Different by team; incorrect paths sometimes used

Business wants “one escalation process”

- Communications overlaps and gaps

Some communications and pages sent by both teams to the same recipients

Some new players not included in the aliases

- Missing role in CVCM

No one plays the “one face to IT” position for the Business; gap in providing holistic IT support

Not clear on the CVCM side where engagement service should reside

“Who is whose customer?” is much clearer in GPSS picture than CVCM picture

- Case documentation practices gaps: e.g., approvals, decisions in the case

- Unclear accountability / responsibility for decisions involving incident resolution that involves greater impact – business and IT

Needed by application and group of applications

More than one person, e.g., primary & delegate

Recommendations for next steps

Immediate

- Get clarity on **who owns which CS systems** (authoritative list)
 - Understand where there is clear ownership and where is overlap; for overlap, define where you go first
 - Scrub the EMAN information and fix gaps
 - As a short-term fix, publish the ownership to OCC
 - Define approvers (IT and business) by application or application group
- Publicize the **mailer** information and address gaps in CVCM recipients
- Define (review, agree on) the **decision RACI**
- Steps to drive to better **case documentation** practices?
 - IT Ops + BSOS/ITDS
- Short-term fixes to **escalation** process
 - Warm hand-offs for mis-routed escalations
 - Key super-users
 - CS: re-educate their teams on escalation (use bsos-duty for P1/P2)
- Get clarity on CVCM vision for where client engagement should reside

Subsequent

- Define a **client engagement role** that abstracts the details of IT groups involved and addresses existing gaps
 - Address the “who is whose customer” question
- Get to **one escalation process**, shared between GPSS and CVCM/ITDS
 - Includes defining the super-users
 - Set up so that SMs and SLs from both sides are involved in response
 - May involve defining an agreement with the Escalation Desk
- Define / build out the **super user community**
 - Focused on CS Ops, Theater Ops
 - Roles, how do we reach them
- Define CS-specific SLAs
 - Services offered, processes to get the services, timelines and other metrics, etc
 - Examine whether a **GSA** is needed to define CS-specific incident response
- Leverage ITDS outsourcing as a means to centralize services and drive consistency

Decisions needed

- ❑ Confirm desire to “abstract” the details of IT support to the CS business – *CONFIRMED*
- ❑ Confirm intent to staff client engagement role – *CONFIRMED (to be “Ops Manager” role)*
- ❑ Confirm accountability and escalation decision ownership between CVCM-IT and ITDS
- ❑ Resolve location for engagement role – *CONFIRMED CVCM-IT, at least to start*

Scenarios

Tier 1: "Critical-High"

Tier 2: "Medium"

Remedy 7 Impact/Urgency Grid
configured examples

Urgency (the demand or need for action)

Impact (effect that an incident is having or may have on the business)

Impact/ Urgency	Critical	High	Medium	Low
Widespread	OCC 10min/2hr	OCC 10min/2hr	OCC 10min/4hr	OCC 10min/4hr
Significant	OCC 10min/2hr	OCC 10min/4hr	OCC 10min/4hr	Warm-Transfer 4hr/8hr
Moderate	Warm-Transfer 10min/4hr	Service Desk 4hr/8hr	Service Desk 8hr/16hr	Service Desk 16hr/40hr
Minor (Single User)	Warm-Transfer 4hr/8hr	Service Desk 4hr/8hr	Service Desk 8hr/16hr	Service Desk 32hr/80hr

Red/Orange boxes on first two rows align with P1/P2 definitions and are handled by OCC, as P1/P2 incidents were prior to Remedy 7