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IT CS Support Strategy Update



26 May 2010

Items

- Milestones
- Decision RACI
- SLA discussion
- Escalation materials
- Leadership team read-out plans

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

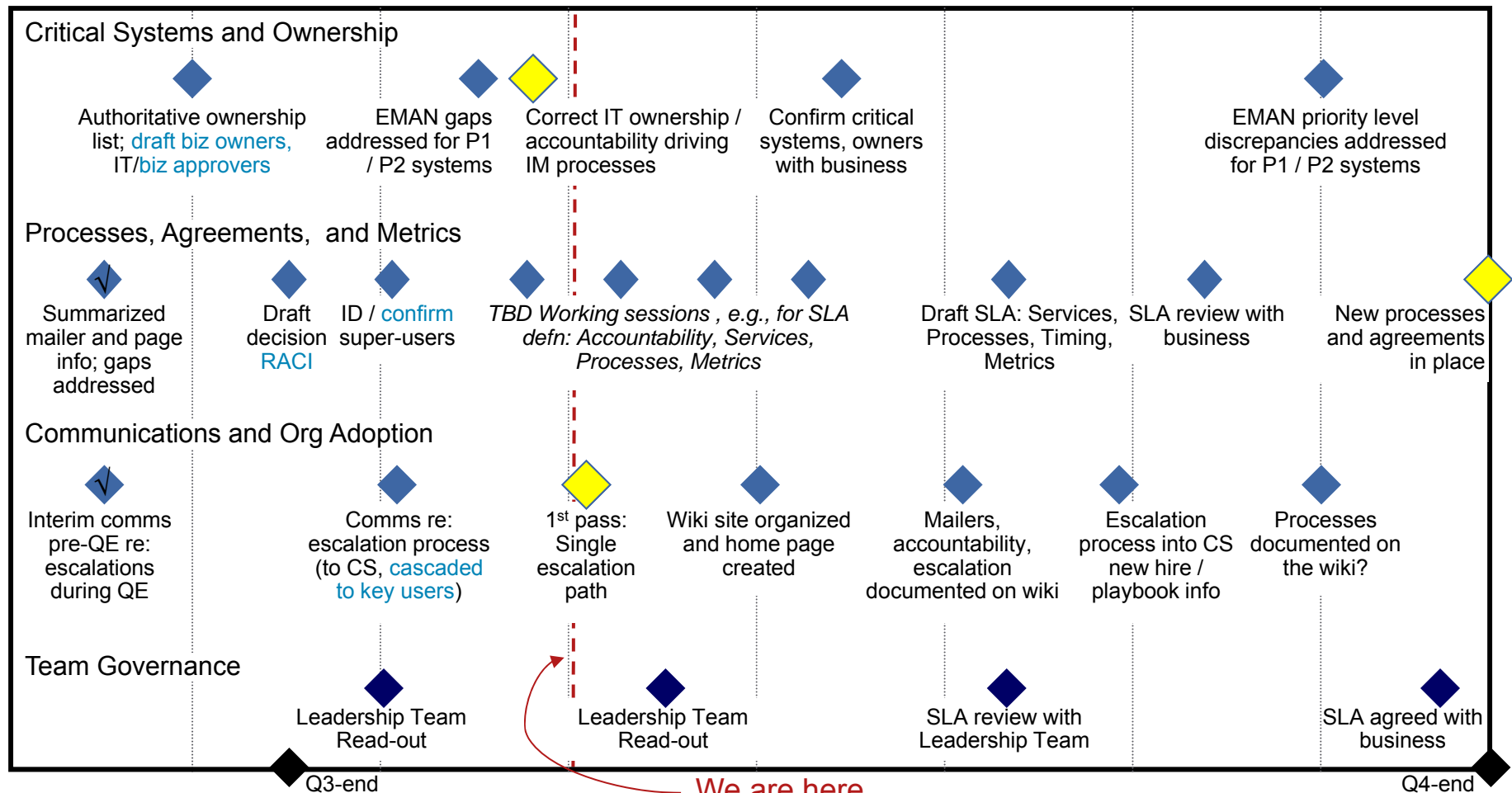
May 24

Jun 7

Jun 21

Jul 5

Jul 19



Key milestones – *Revised Draft*

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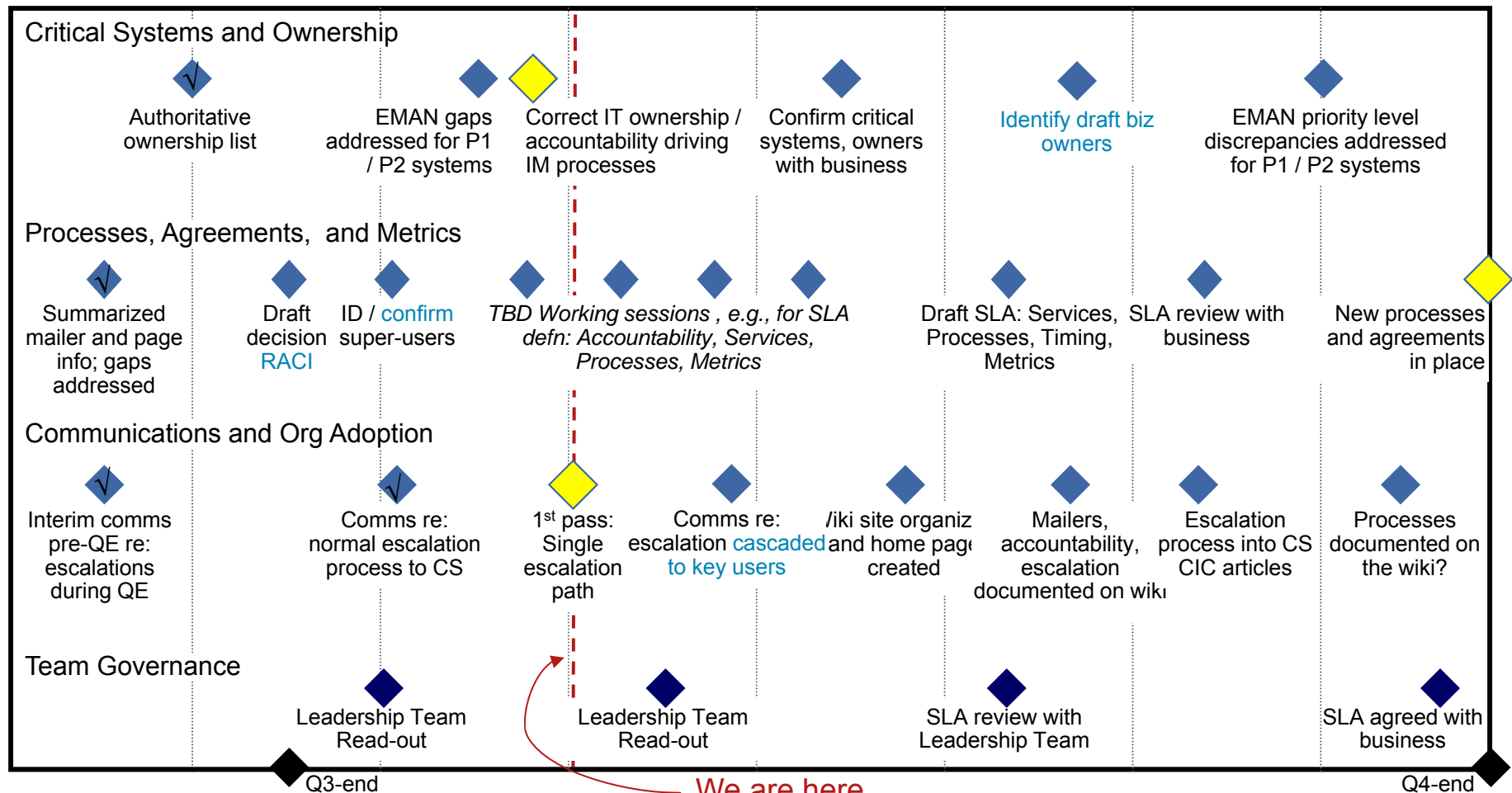
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CS-impacting incident decisions and notifications

Scenario	Steven Smith	Dale Chapman	Arvind Bedi	CS Ops Theater Leads	Parisa	Outage Alias*
No issues (QE only)	QE: I	QE: I (plus Ginna's mgrs)	QE: I	QE: I	QE: I (plus Steve M's mgrs)	QE only: Daily update
> X quotes/orders stuck	NA (normal escalation process)					
Unplanned outage or performance degradation	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)	NA
Outage / performance resolution	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

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

Decision RACI – Incident Management

Scenario	ITDS Support Team	ITDS SL	ITDS SM	Ops Mgr (or Jeff?)	CS Global Ops	CS Leads	Steven	Dale or Arvind	Dir, CS
Investigate issue	R	A	I	I			I	I	
Confirm incident impact with CS business		A			A	R			
Communicate incident to broad community	R	A			I	I	I	I	I
Issue executive / mgmt comms (critical cases?)					I		I	I	I
Identify proposed resolution path or actions needed	R	A	C	C	C				
Evaluate impact of proposed action w/ CS ops	R	A	C	C	A	R			
Approve or dis-approve actions (if creates impact)				R (Delegate)			A	A	A

Focus area: critical/high?

Tier 1: "Critical-High"

Tier 2: "Medium"

Remedy 7 Impact/Urgency Grid
configured examples

Urgency (the demand or need for action)

		Critical	High	Medium	Low
Impact (effect that an incident is having or may have on the business)	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

Critical Priority
High Priority
Medium Priority
Low Priority

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

Escalation Summary: Normal, ME, QE

Situation	Definition	Process	Coverage and SLAs	
			Normal	ME/QE
Incident / Outage (“P1/P2”)	A critical tool is down or unavailable from a site or experiencing significant performance degradation	Page <a href="mailto:bsos-duty@epage.<client name deleted>.com">bsos-duty@epage.<client name deleted>.com for application and database issues <i>Not for single order/quote escalations</i>	24x7 coverage 10 min ack; 2-4 hr resolution	24x7 coverage 15 min ack; 2-4 hr resolution
Incident / Outage (“P1/P2”) – iFax	Same as above, but specific to iFax	Use online case escalation tool: <a href="http://www.in.<client name deleted>.com/webdev/internet/op/help/escalation.shtml">http://www.in.<client name deleted>.com/webdev/internet/op/help/escalation.shtml	24x7 coverage 10 min ack; 2-4 hr resolution	24x7 coverage 15 min ack; 2-4 hr resolution
Quoting issues: Deal / CTMP	Any deal issues on DCP, My Deal Manager, CCW-Quoting, EDMS (DSSOT), DART, CTMP and E-Promotions <i>Not for system outages</i>	Please send email to <a href="mailto:quoting-escalation@<client name deleted>.com">quoting-escalation@<client name deleted>.com	TBC. Likely similar to / same as other quoting, i.e., not 24x7 except at QE	24x7 coverage 15 min ack; 2 hr resolution
Ordering issues	Stuck orders, order application issues, failed configuration lines <i>Not for system outages</i>	Stuck Orders / Order application issues: Please send an email to: <a href="mailto:bsos-order-escalation@<client name deleted>.com">bsos-order-escalation@<client name deleted>.com	16x5 coverage 4 hr ack; 24 hr resolution during coverage window	24x7 coverage, both ME and QE 15 min ack; 2 hr resolution
Other Quoting issues	Stuck quotes or any other single deal escalations <i>Not for system outages</i>	Stuck Quotes: Please send an e-mail to: <a href="mailto:bsos-quoting-escalation@<client name deleted>.com">bsos-quoting-escalation@<client name deleted>.com	16x5 coverage 4 hr ack; 24 hr resolution during coverage window	ME: 16x5 coverage QE: 24x7 coverage ME: 4 hr ack; 24 hr resolution during coverage window



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Beginning of Backup Materials

Progress

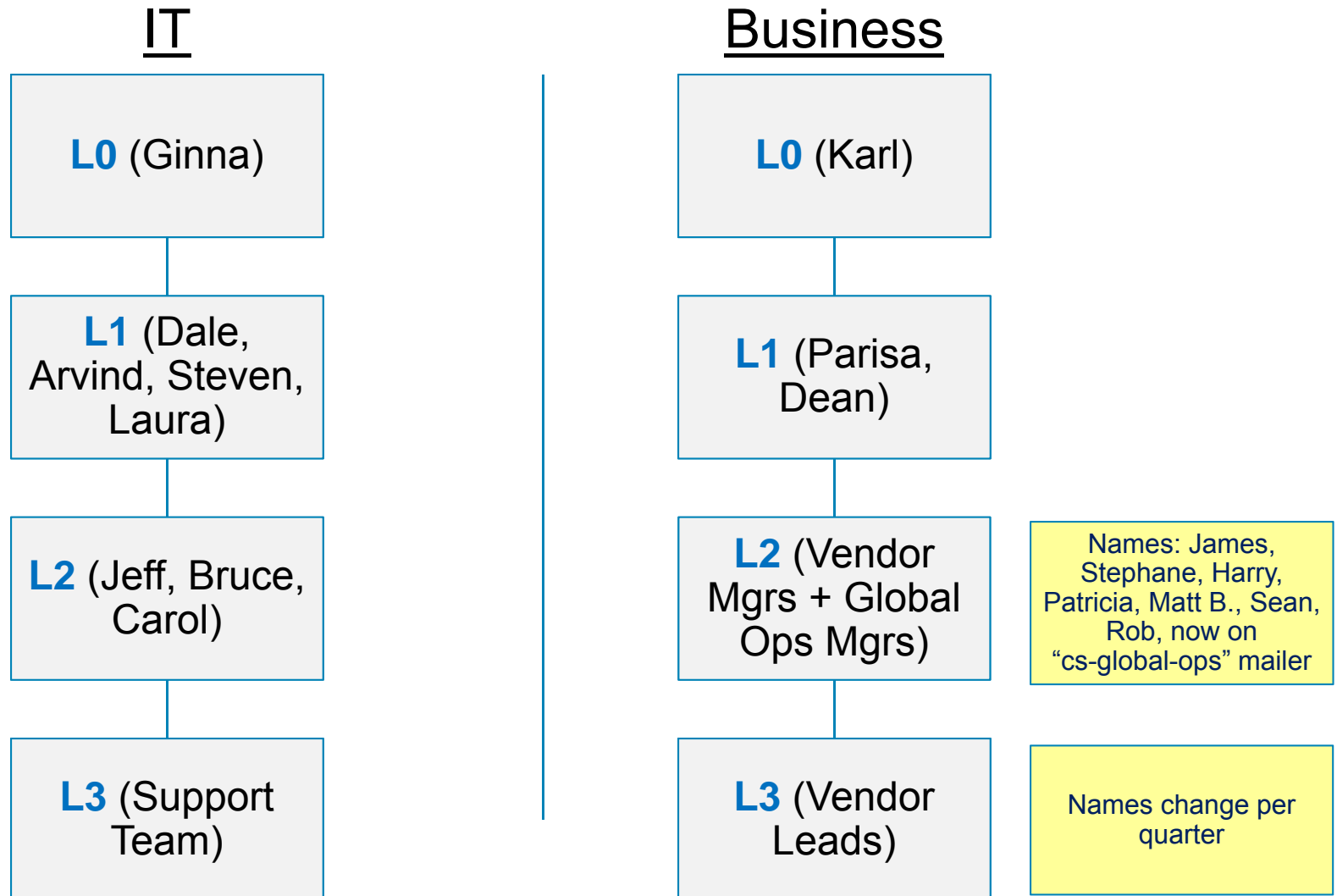
Accomplished	Not Yet Accomplished
<u>Incident Management Communications</u> <ul style="list-style-type: none"> Identified as-is incident comms and proposed to-be structure for CVCM-IT Worked with business to define needed recipients of incident management comms; implemented (CVCM) 	<ul style="list-style-type: 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

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



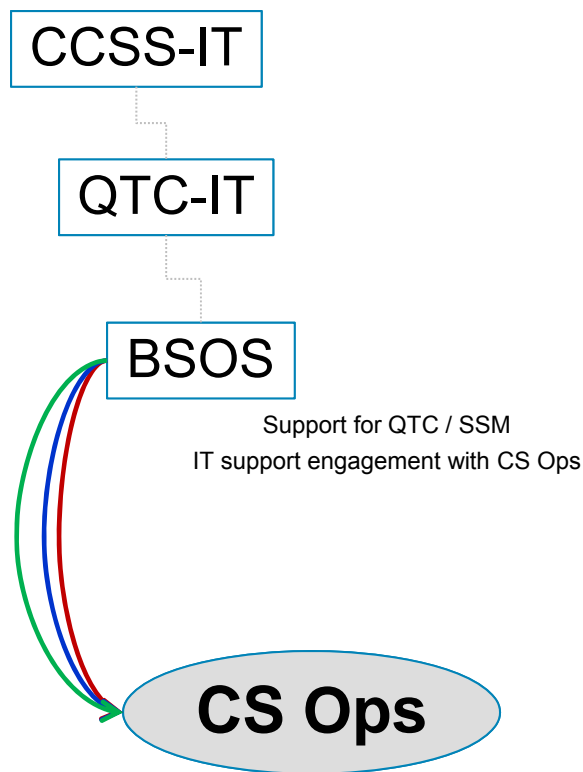
Working Team Read-out
April 7, 2010

Meeting objectives

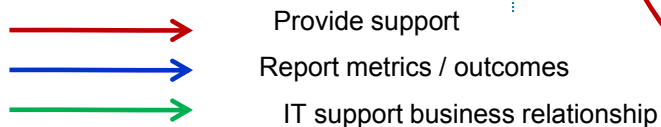
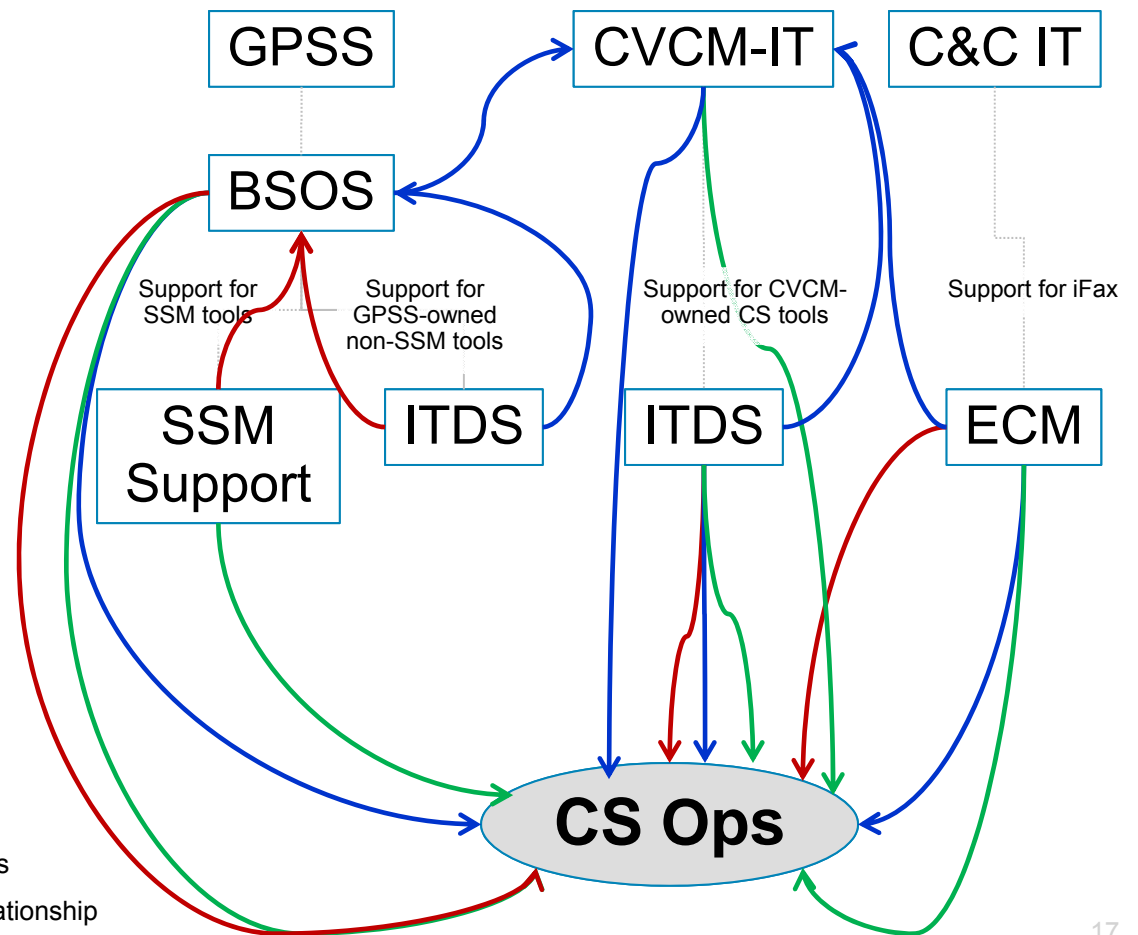
- Review output from last week's assignment:
 - As-was and as-is organization, roles, processes
 - Gaps
 - Recommendations for next steps
- Confirm decisions and next steps

Organization – then and now

Then

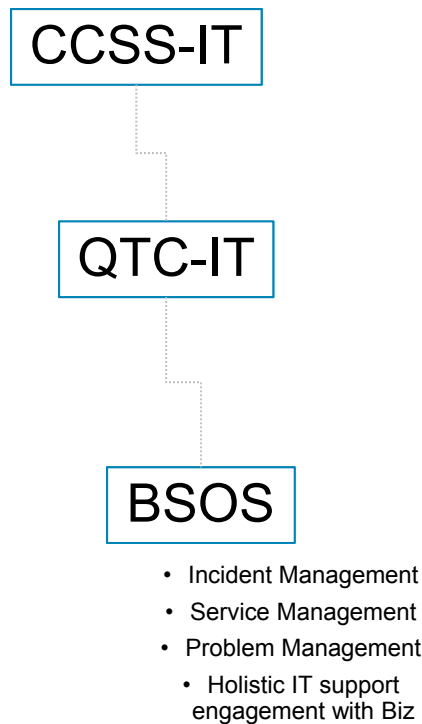


Now

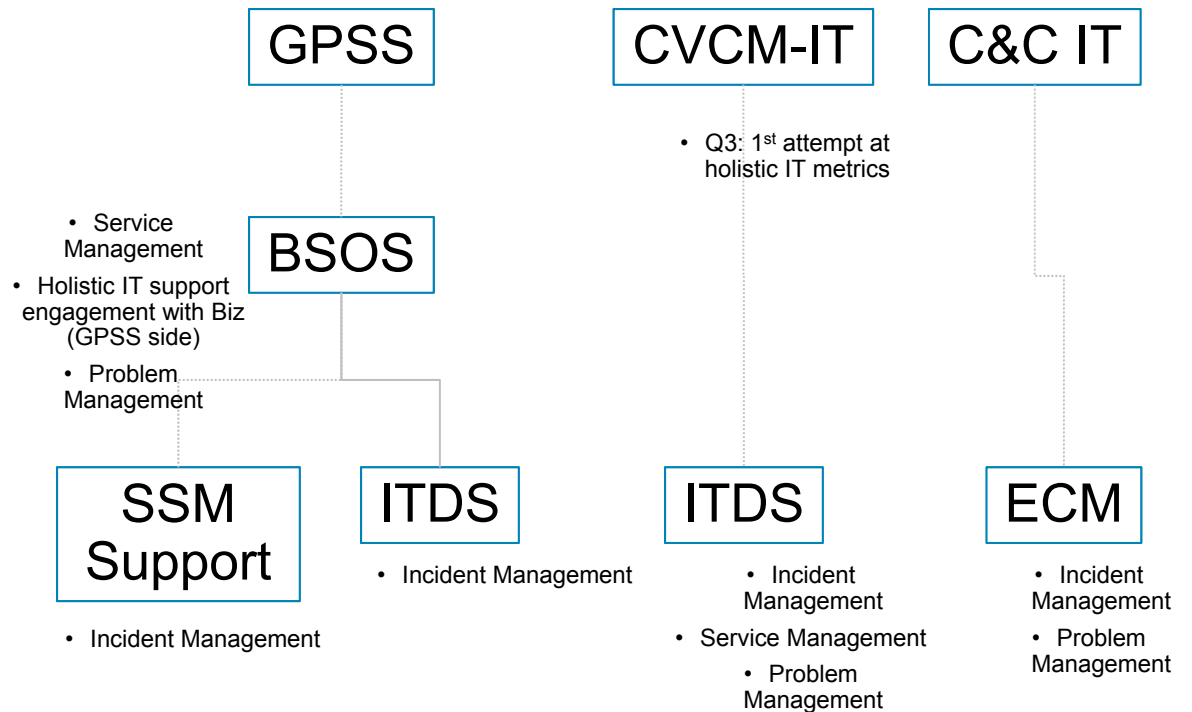


Roles – then and now

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 <client name deleted>.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*