

Global Process Methods & Tools

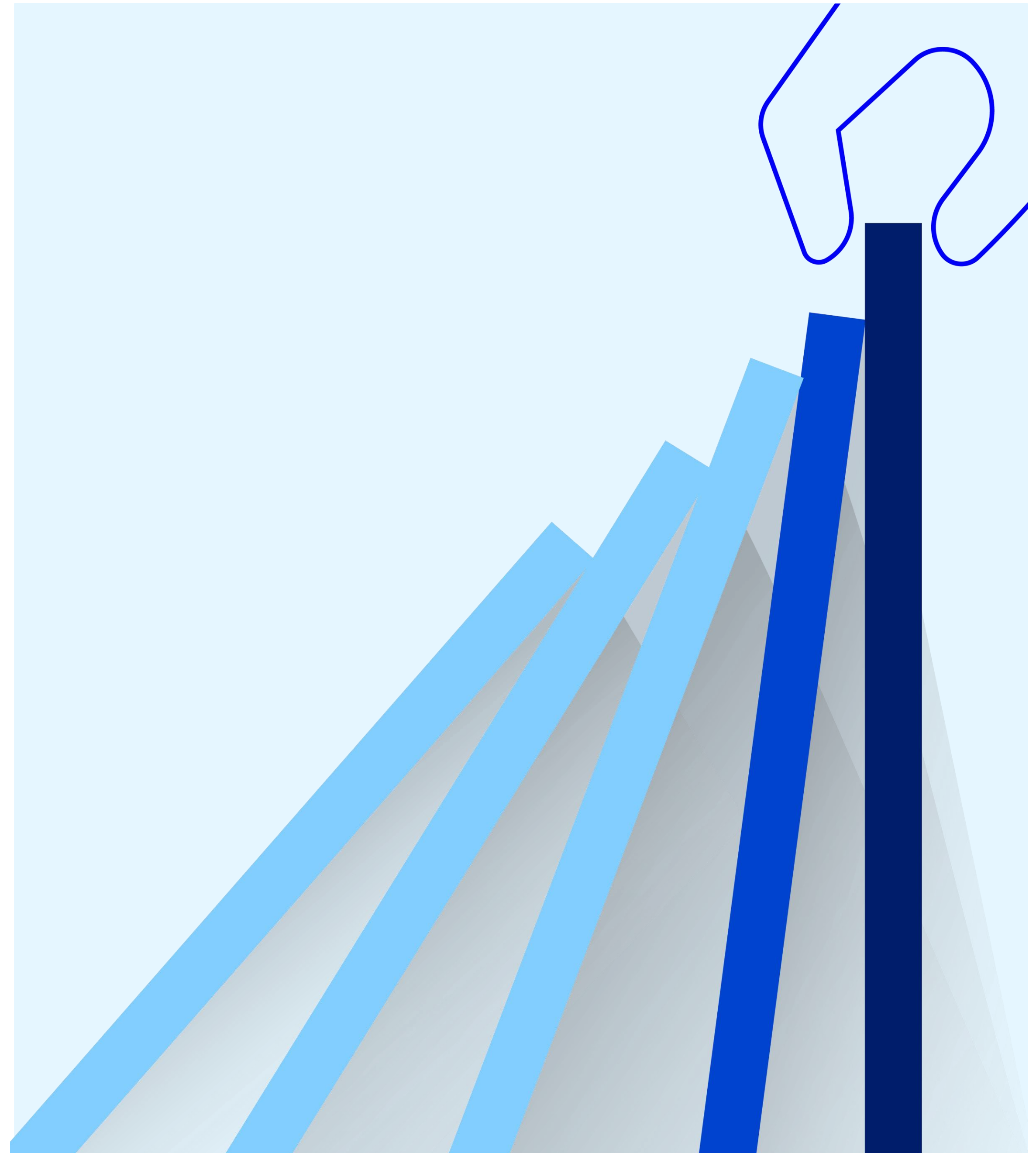
Method Adoption Workshop (MAW) Guidance

Version 5.7



Global PM&T
Process Methods & Tools

IBM Consulting



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IBM Consulting Methods



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IBM Consulting Methods

- "Modernized through cognitive, agile and design thinking; with a consistent branding and look and feel to help us present a unified approach to our client; and integrated across the breadth of the IBM Consulting portfolio and in all geographies around the world..."
- Methods are of fundamental importance to the delivery of a consistent experience."

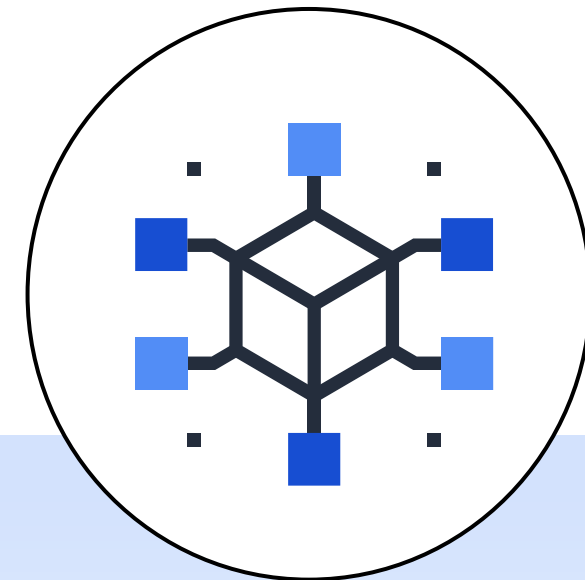
Mark Foster, ex-Chairman
IBM Consulting

What do IBM Consulting Methods provide?



Proven way of working

A proven way of working **based on experience** providing **consistent delivery** for improved productivity, quality, security and happy clients. Includes expert content, role-specific guidance, templates, examples and system-generated outputs to inform an engagement plan.



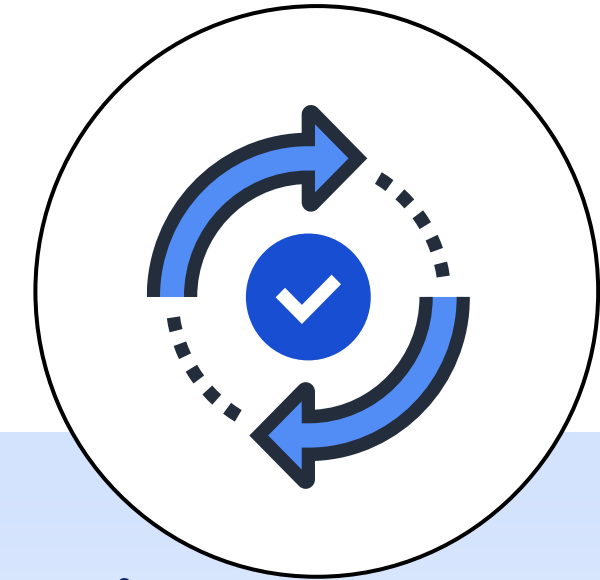
Flexibility

Can be used for both **Agile and Traditional** delivery irrespective of practitioner location & experience. Methods can be **tailored** to fit clients needs. Methods are combined for complex deals using the **IBM Services Mosaic Method**



Accelerators

Leverages **tools, estimation models, assets and other accelerators** to design & deliver optimum client solutions consistently & effectively.



Best practice

Promote **IBM Best practices** and are aligned with **Industry Standards**, such as ISO and CMMI. IBM's engagement Management Method & Security standards are baked into Methods.

Why use IBM Consulting Methods?



Compelling proposals

- Putting forward credible Methods for deriving and delivering solutions **helps persuade a client** that IBM knows how to achieve what we are proposing
- Being able to explain the pros and cons of different Methods and explain **why a particular Method is best** for a client engagement is particularly compelling
- Given that Method describes how we will do delivery work, it is **an essential element** of a proposal



Cost efficiency

- Both profit and signings win rates are improved by reducing costs and **asset reuse** in key to achieving this
- Where asset reuse has been successful, the asset material has been **described using standard Method work products**, making its reuse more likely
- Use of standard Method **reduces Method adoption costs** and improves program start-up time, with team members quickly able to communicate



Delivery excellence

- Having repeatable Method that has been proven to work and optimized on previous deliveries is a **key foundation for achieving delivery excellence** and **for reducing trouble situations**
- Sound Method use helps a delivery team to **manage uncertain aspects** of a delivery, such as requirements refinement or 3rd party dependency achievement
- Sound Method use also **helps communication** across a program, especially important on the larger programs



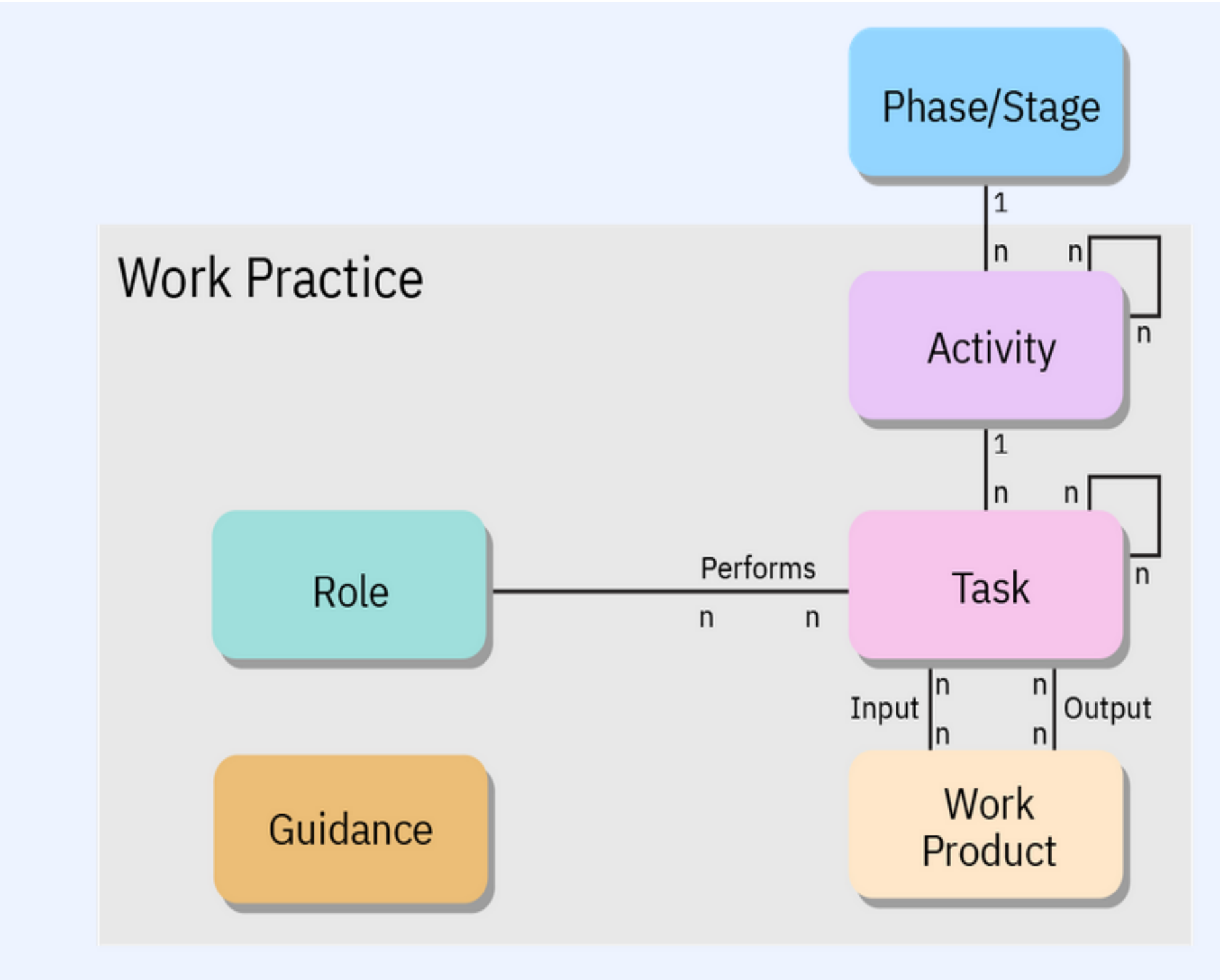
Professional credibility

- IBM's consultants need to be able to demonstrate a good grasp of Method as part of **establishing their professional credibility** with clients
- Method describes **how we do our work**, whether it be engagement management, agile custom development, etc.; if we don't know Method then how do we do our work?
- Having standard IBM Method also helps build a **consistent, professional IBM brand** in the market

Method Framework

Methods are an integrated & standardized delivery approach for a specific offering(s), providing guidance and instruction on how to deliver client solutions. The IBM Method framework defines core content which are – activities, tasks, work products, roles.

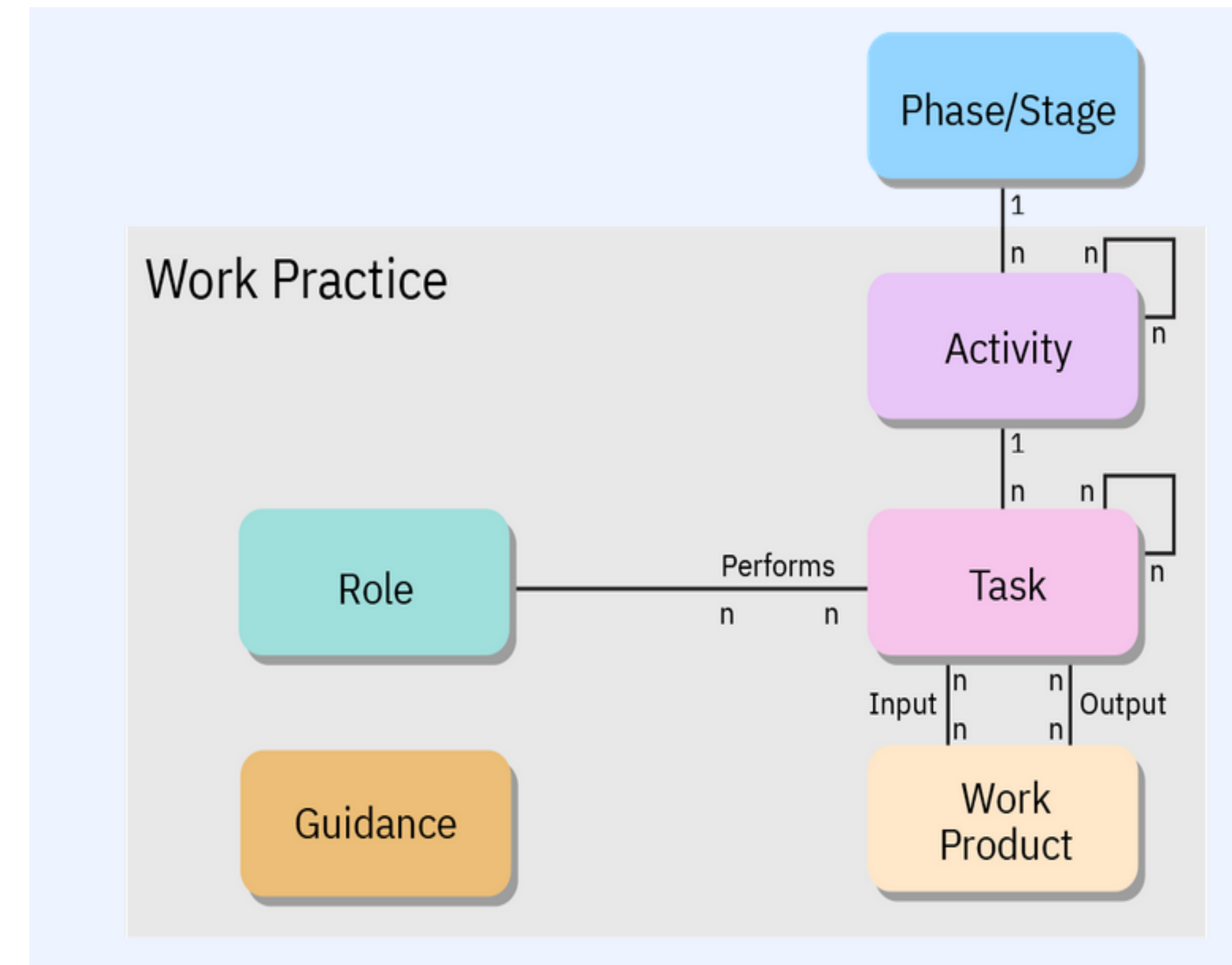
Component	Description
Phase/Stage	Lifecycle stages of an engagement often based on contractual milestones, major deliverables, or decision checkpoints.
Work Practice	Reusable building blocks to construct a Method. (See more details in the next slide)
Activity	Group of tasks to achieve a specific deliverable/ outcome within a delivery phase.
Task	Specific action performed by a team member to achieve client deliverable.
Work Product	Inputs to / outputs from a task. A work product can produce a specific deliverable, or it may input to another task which builds up to produce a deliverable.
Role	Describes the logical role and corresponding skills necessary to perform a task or create a work product.
Guidance	Provided additional context and details to inform delivery decisions.



Method Components - Work Practice

Work Practices are reusable building blocks to construct a Method:

- They are clustered content that represents a **capability to achieve an objective** and **deliver an end-to-end capability** through a series of actions.
- Work Practices are infused with **best-in-class assets** and accelerators harvested from engagement experience and expert knowhow.
- Cover activities, tasks, work products, guidance and roles.
- Enables **Method Tailoring and Adoption**.



Method Components - Guidance

For each Method as shown there is guidance available for each Method on it’s use on [Method Workspace](#).

Application Development - Agile (AD-Agile)

Export

Tailor

Get Guidance

Bookmark

Feedback

Overview

Guidance

Explore the Method

This Method supporting material provides role-specific guidance from Sales to Solutioning to Delivery. You may find some of the Solution Delivery material is useful for early client discussions/ presentations to demonstrate IBM capability & depth of experience. Enablement material is a good place to start to orientate yourself on the method.

Education

Method Education

Opportunity Management

Pre-sales Overview

Solution Design

Solutioning Guidance

Proposal Insert

Solution Delivery

Workflow

Method Guidance

Service Line Standards

Guidance on the estimation models and tools to be used with this Method, defined by the owning Service Line, can be found here [Application Development - Agile \(AD-Agile\)](#).

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Method Components - Guidance

The following guidance materials are available under the Guidance section in each Method.

Method Education provides Method understanding and usage guidance during solution design, project launch and delivery.

Pre-sales Overview provides one page Method graphic for use in client conversations to showcase IBM experience and differentiation.

Proposal Insert a Method write-up, highlighting IBM delivery experience and differentiation for use in client proposals & presentations.

Solutioning Guidance provides guidance to Opportunity Owners and Solutioners on Method fundamentals when solutioning new deals, gives specific direction on estimation assumptions, lessons learned and tooling considerations.

Workflow highlights key activities & client deliverables/ outcomes when using the Method.

Method Guidance provides an overview of Method and how to use it for project delivery.

Using Methods

IBM Consulting Methods are not a ‘cookbook’ and there is not just one way to apply Methods on an engagement.

Each engagement is different. Therefore, we need to tailor the Method to meet the specific engagement situation.

A Method is the full reference information provided by Subject Matter Experts (SMEs)

Typically, we don’t perform all the activities or develop all the work products on a engagement.

Tailoring allows us to select and apply those Method components that apply specifically to our engagement.

Methods are tailored during Method Adoption Workshop (MAW).....

Method Adoption Workshop (MAW)



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What is MAW?

Method Adoption Workshop (MAW) is a process that bridges the gap between the published Method and the specific engagement circumstances. It is an approach to **select and/or tailor the Method and take decisions related to Tools and Assets (including GenAI) and Estimation models** to :

- Familiarize the engagement team with the Method, assess training and mentoring needs and **tailor the Method** to the needs of the engagement.
- Establish the list of work products that will be produced by the engagement, called **work product list** with the ultimate objective of deciding on the minimum number of work products required to successfully deliver the engagement.
- Examine **engagement risks** and revise their priorities.
- Establish an initial **work breakdown structure**.
- Establish the set of Tools and Assets (including GenAI), Estimation Models aligned to the needs of the engagement

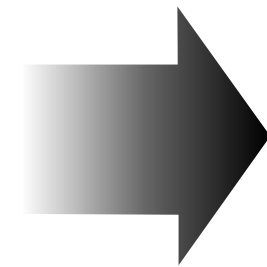
The workshop can last from 1 to 5 days, dependent on the complexity of the engagement and may be conducted through self-adoption or with the involvement of a SME for complex/large noncomplex engagements.

The Solutioning or Delivery Team Leader has the overall responsibility for the MAW. A MAW should be carried out during **Solutioning** (at a high level), then again during **Delivery** (at a detailed level) when performing **engagement Launch**.

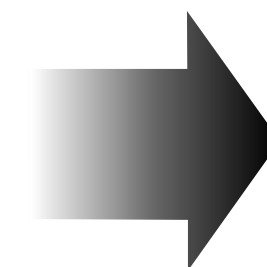
Fitting a pre-cut suit is much cheaper than creating one from scratch



You pick a pre-cut suit off the tailor's shelves...



A tailor fits the suit to your needs...



Your perfect suit!

- No one Method can fit everything
- We use a general delivery process which will be tailored to the needs of the individual engagement.

MAW is a decision process

Understand the Client Needs

- Analyze the Opportunity during **Solutioning** or understand the contract during **Delivery**

Select Methods & Tailor

- Select the Methods that best support achieving the client needs
- Tailor the Methods to customize the delivery model approach as per the client needs
 - Remove non-required activities & deliverables
 - Include any additional activities & deliverables

Select Tools & Assets (including GenAI), Estimation Models

- Review the Tools and Assets (includes GenAI) and validate per Service Line recommendations, to ensure suitability for delivery
 - Assess Estimation Models required to support the delivery model, per Service Line recommendations

**Decision
Process**

Why is MAW important?

- It provides a **clear message** to all stakeholders and team members about client deliverables and expectations.
- Helps the Engagement Manager and the delivery team to **better estimate** and either agree upon or negotiate better timelines, avoiding issues later in the engagement.
- Identifies the **engagement work product list**, activities, roles and tasks aligned to client deliverables to input into engagement plan or backlog.
- Guides teams in different locations to use a **common delivery approach**, Tools & Assets (including GenAI) to drive consistency leveraging common language & understanding to ensure the entire team are moving in the same direction.
- At the end of the Delivery MAW, we should be able to display **the overall high level engagement plan** and see **the interdependencies** in detailed form between work done by IBM, Contractors and Client. All these should enable us to see if there is any gap between IBM's SoW / Contract, Vendor's SoW and DoU with different IBM Units on one hand, and what we plan to deliver as documented by MAW results on the other. Any gap(s) need to be filled in appropriately.

When to select and tailor Methods

Solutioning

In Solutioning:

- Select Methods, Tools & Assets (including GenAI) and Estimation Models
- Complete high-level Method Tailoring in [Method Workspace](#).

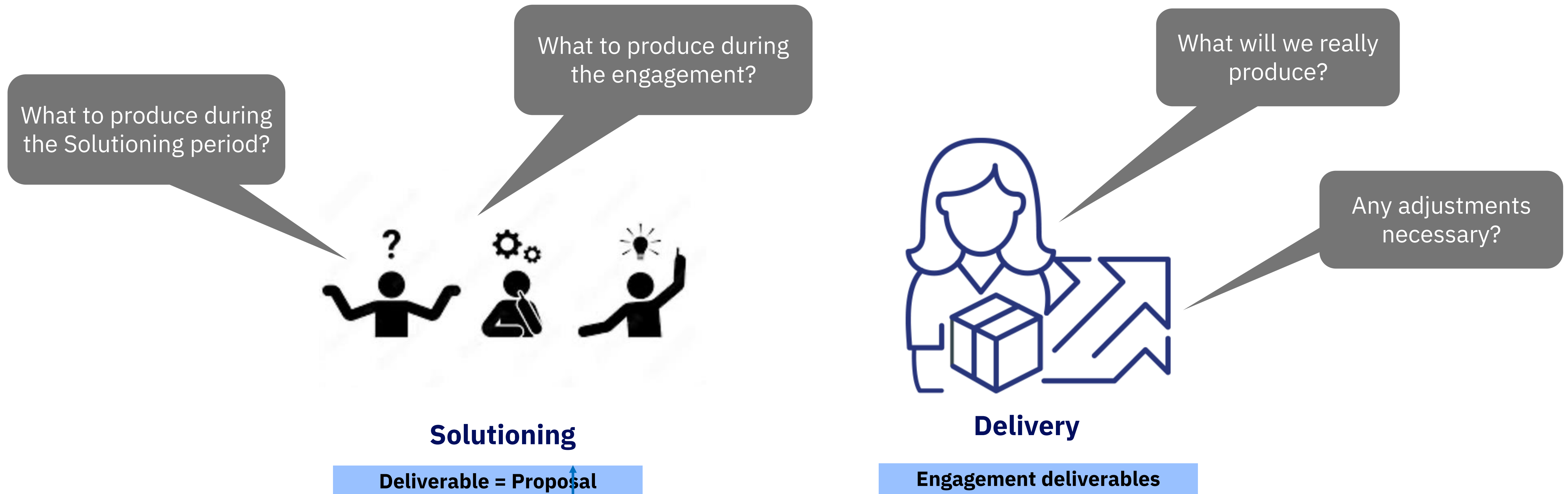
Delivery

Then in Delivery:

- Select / Review Methods, Tools & Assets (including GenAI), and complete **detailed** Method Tailoring in [Method Workspace](#), as specified in [Project Launch](#).
- Conduct MAW iteratively, Review / Tailor as needed for long term engagements / contracts.

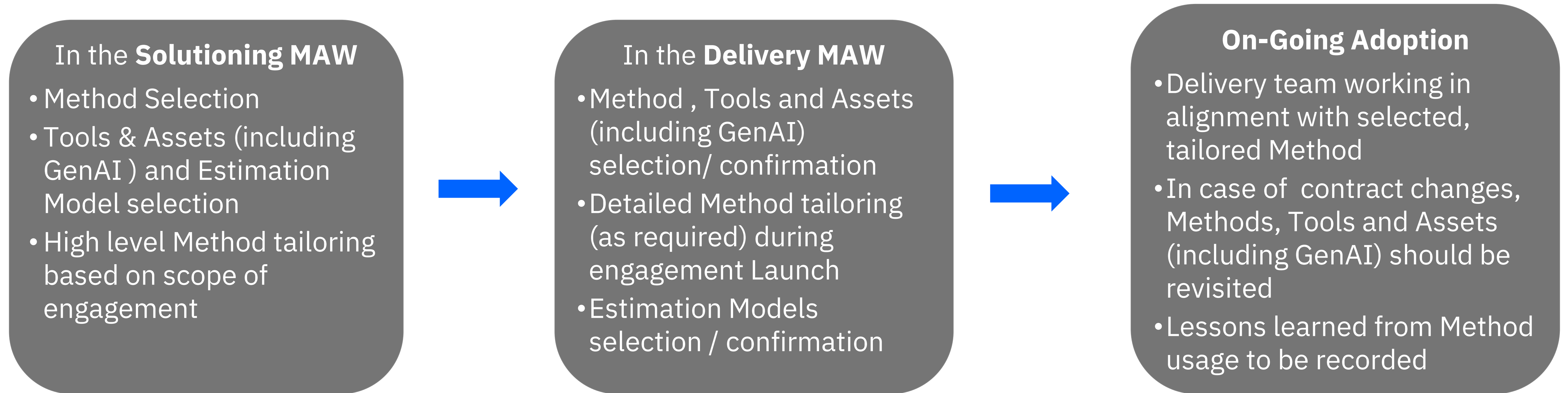
Running multiple MAWs

MAWs are necessary during Solutioning and Delivery – and more than 1 MAW will probably be required.



Investigations during Solutioning work may result in early drafts of work products

Use the same approach to tailoring during Solutioning and Delivery



Solutioning vs. Delivery

The MAW focus is different in Solutioning and Delivery

MAW during Solutioning

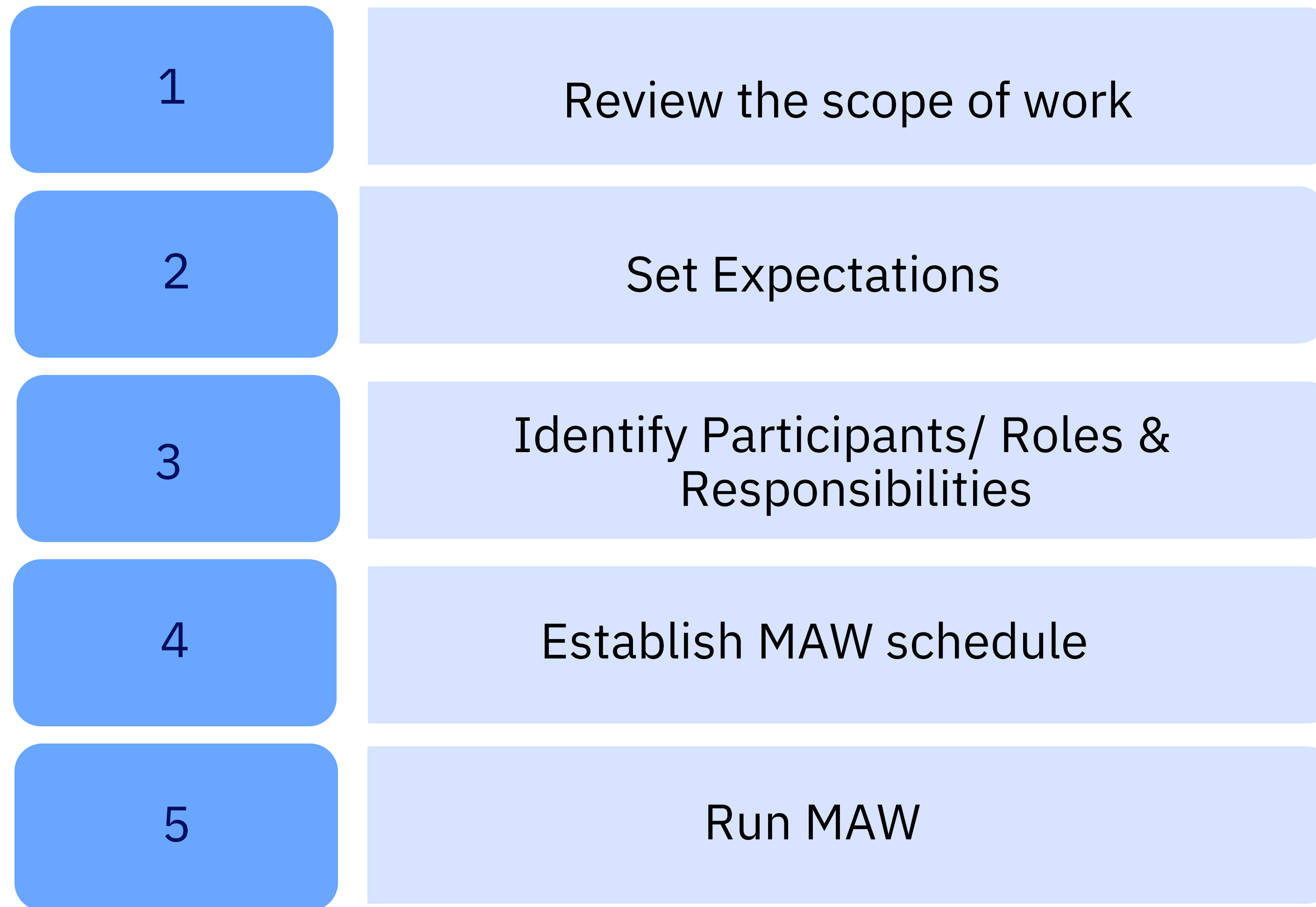
- Focus on the Solutioning and SOW efforts
- Select work products based on client needs
- Identify scope, delivery approach, deliverables
- Identify appropriate Method(s) and do the high-level tailoring as required
- Select work products for the delivery engagement
- Select Tools & Assets (including GenAI), Estimation Models
- Create high level engagement plan and estimates
- Identify and record risks, issues, actions and decisions

MAW during Delivery

- Review MAW decisions during Solutioning
- Confirm the project scope and the delivery processes
- Identify the appropriate Method(s) if not already selected during Solutioning and tailor it based on the project need
- Finalize the work product and work breakdown structure
- Review Finalize the Tools & Assets (including GenAI) to be adopted by the project
- Review and confirm the Estimation Models to be used by the Project
- Orient delivery team on Methods, Tools & Assets (including GenAI)
- Identify and record the risks as well as improvement areas

Steps in running a Method Adoption Workshop

There are five steps in running a Method Adoption Workshop (MAW):



1

Review the scope of work

Method Adoption Workshop is used to bring the proposal / engagement and the Method together.

Input

- Agreement, Proposal, Vendor SOW, DoU, Vendor / Client Method
- Engagement Definition

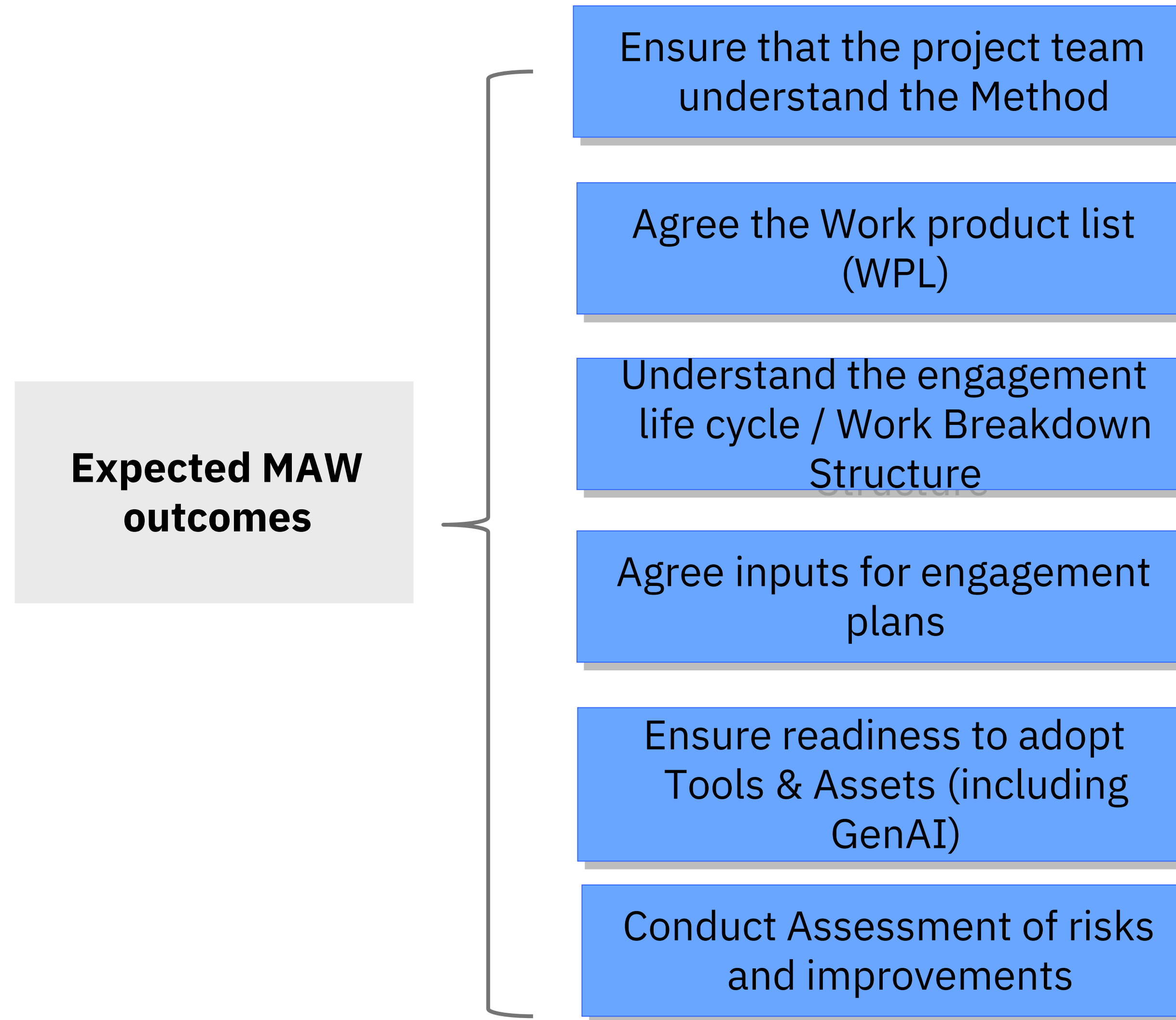
Objectives

- Understand the proposal / engagement
- Tailor the Method to proposal / engagement
- Review/confirm Tools & Assets (including GenAI)
- Review/confirm Estimation Model(s)
- Assess risks and improvement opportunities
- Know required team skills and assess the training needs

2

Set Expectations

It is important to set the expectations of the MAW:



3

Identify Participants/ Roles & Responsibilities

The **main IBM roles** that will be involved in a MAW are:

- Solutioning Consultant / Delivery Team Leader
- Method SME
- Any other needed SME

It is important to engage the **client** as well, to make sure that all the processes in which IBM interfaces with that specific client are jointly reviewed and agreed.

In addition, if for a given contract there is a **third party (vendor)** involved, this one should be also engaged, to jointly define interfaces between the IBM's and vendor's common processes.

Only in this way we can ensure that the final merged and tailored Methods will be fully aligned with the IBM standard Methods, but also with the client's and / or vendor's own Methods, taking into consideration the specific context of each contract.

3

Identify Participants/ Roles & Responsibilities

The **Solutioning Consultant/ Delivery Team Leader** initiates and participates in the MAW process, having the following responsibilities:

Is ultimately responsible for managing results, people, and the process of the proposal / engagement.

Is the sponsor and owner of the tailored Method.

Sets the MAW date and ensures key roles participate in the MAW.

Provides additional guidance on client requirements and previously discussed solutions or solution providers.

Tracks actions and owners.

3

Identify Participants/ Roles & Responsibilities

The **EPL SME** plans and leads the MAW while the other **Subject Matter Experts (SMEs)** if required would be engaged to provide the necessary input for their area of expertise.

The **EPL SME** is responsible for providing advice and assistance to the Solutioning Consultant / Delivery Team Leader and their teams in matters of Methods and techniques, work products (including the technical engagement plan), assessment of risks.

The **EPL SME** works with the team to tailor the Method to the needs of the engagement and assists in the construction of a Method-based engagement plan.

The EPL SME can perform a review of an existing engagement, as well as mentoring the engagement team and directly contribute to the production of engagement work products: "setting the example by doing it".

Depending on the size, risk level and complexity of the engagement, the experience / skills of the engagement team, the involvement of the Method SME can go up to full time.

The other **SME** support if required would be leveraged in defining work products, risks, and plans for their area of expertise.

4

Establish MAW schedule

Bringing the right people together at the right time to produce the expected results.

MAW Objectives

Engagement participants

- Solutioning Consultant / Delivery Team Leader
- EPL SME
- Architect
- Other selected participants
- Client / Vendor (partially)



Expected MAW results

- Project Team understand the Method
- List of work products to be produced
- Work Breakdown Structure / Input for the engagement plans
- Readiness to adopt Tools & Assets (including GenAI)
- Confirm the Estimation Models
- Record the risks / improvements

4

Establish MAW schedule

The MAW schedule will vary between 1-3 days to a week depending on the size and complexity of the project. It is important to note that MAW should be completed within Project Launch - which is typically 45 days.

Sample MAW Agenda

Set up: IBM with client

- Set client expectations (including the client mandated assets)
- Decide on participants from client team

Day 1: IBM team

- Engagement overview
- Introduction to the concept of Methods and Method Tailoring
- Review MAW timetable

Day 2: IBM and client

- Method overview
- Start with the Method Tailoring
- Select the Work Products
- Brainstorming risks with clients
- Review the Tools & Assets (including GenAI) and conduct the feasibility analysis to adopt them

Day 3: IBM team

- Review risks and improvements
- Complete WPL
- Finalize the Method Tailoring
- Finalize the Tools & Assets (including GenAI)
- Confirm Estimation models
- Wrap up

5

Run MAW

The tailoring process itself consists of four steps:

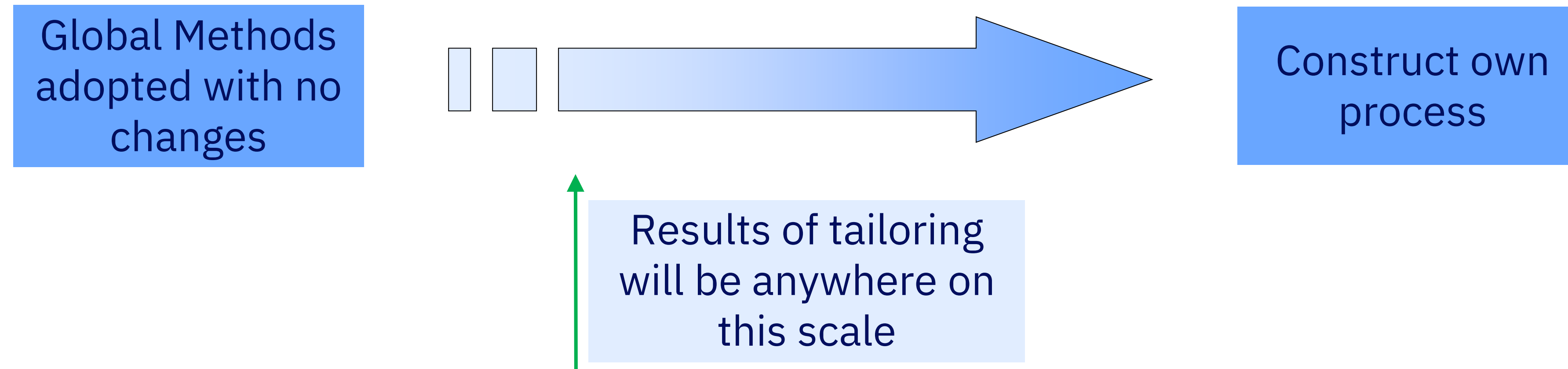
A	Select the Methods
B	Select the Work Products
C	Develop the initial Work Breakdown Structure
D	Identify the Tools & Assets (including GenAI) Confirm the Estimation Models

Note: If the Methods have already been selected and tailored in Solutioning, in Delivery these Methods should be reviewed and updated (as necessary). Review if the Tools and Assets (including GenAI) have been selected during solutioning and assess the feasibility to adopt them during delivery. Please note if no Tools/Assets have been identified during solutioning then decision needs to be taken to select the appropriate Tools & Assets as per the Service Line standards.

5

Run MAW: Select the Work Products

As a start, use the closest Methods which matches your needs (see also the chapter [Multi-Method Tailoring](#))




An Offering could have Methods that are very specific, where minimal or no tailoring is needed.

Sometimes a work product already exists or will be produced by the client or another supplier.

5

Run MAW: Select the Methods

After selection the Method, you need to select the work products to be produced. To do so, ask yourself these questions:

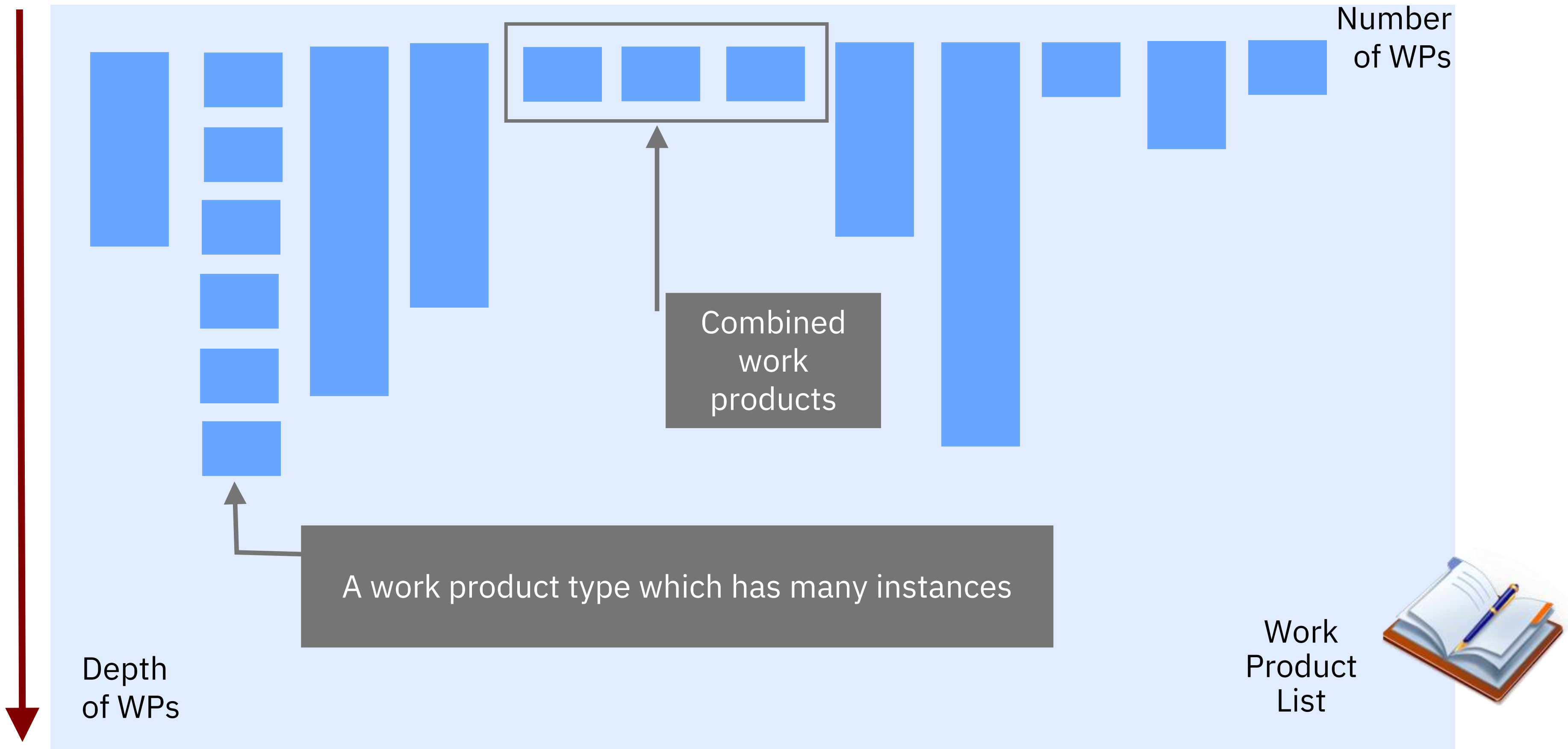
- 
- Which work products are needed to produce the confirmed business requirements?
 - What areas of the engagement has the client chosen to perform?
 - Which work products can be eliminated without additional risk?
 - Which work products already exist?
 - Which work products are good candidates for reusing existing assets?
 - What tools are going to be used?
 - To what extent is IBM responsible for producing the work products?

5

Run MAW: Develop the initial Work Breakdown Structure

Selection of **work products** has two dimensions:

- **Number** of work products
- **Depth** of selected work products (the number of iterations)



Note:

Tailoring could be an **incremental** process, based on the contract’s phase.

5

Run MAW: Develop the initial Work Breakdown Structure

Decide on the work products you need on your engagement. You always have an option to add or delete to align with the engagement needs.

Below is a snapshot from [Method Workspace](#) which offers the facility to add or delete the Work Products from Work Products/ Work Breakdown view.

Some work products have been mandated to adhere with the Project Management/ Industry standards which are denoted by (**) in MWS. Removing the mandatory work products will require you to provide an appropriate reason.

Work Product View

Browse tailored method | Tailor method
Application Impact Maintenance Tailored

Save

Export

Work Breakdown

Work Products

Roles

Tailoring History

Search the method Work Products

Chart

Alphabetical

Domains

Phase

☒ Actor

Removed work product

☐ Agreed deliverables
☒ Agreement**

Mandatory Work Product

☐ Application Function Model
☒ Application Information Document
☒ Application Maintenance Turnover Definition

Select a Work Product to view the details

Work Breakdown View

Application IMPACT - Maintenance

Work Breakdown

Work Products

Roles

Work Breakdown - Expand All

Hide Work Practices

Search Tree

Plan an Estimate in Delivery

Define Purpose and Scope of the Est...

Estimation Report

Project Manager

Removed work product

☐
☐
☐
☐

Sub Activity

Task

Output Work Product

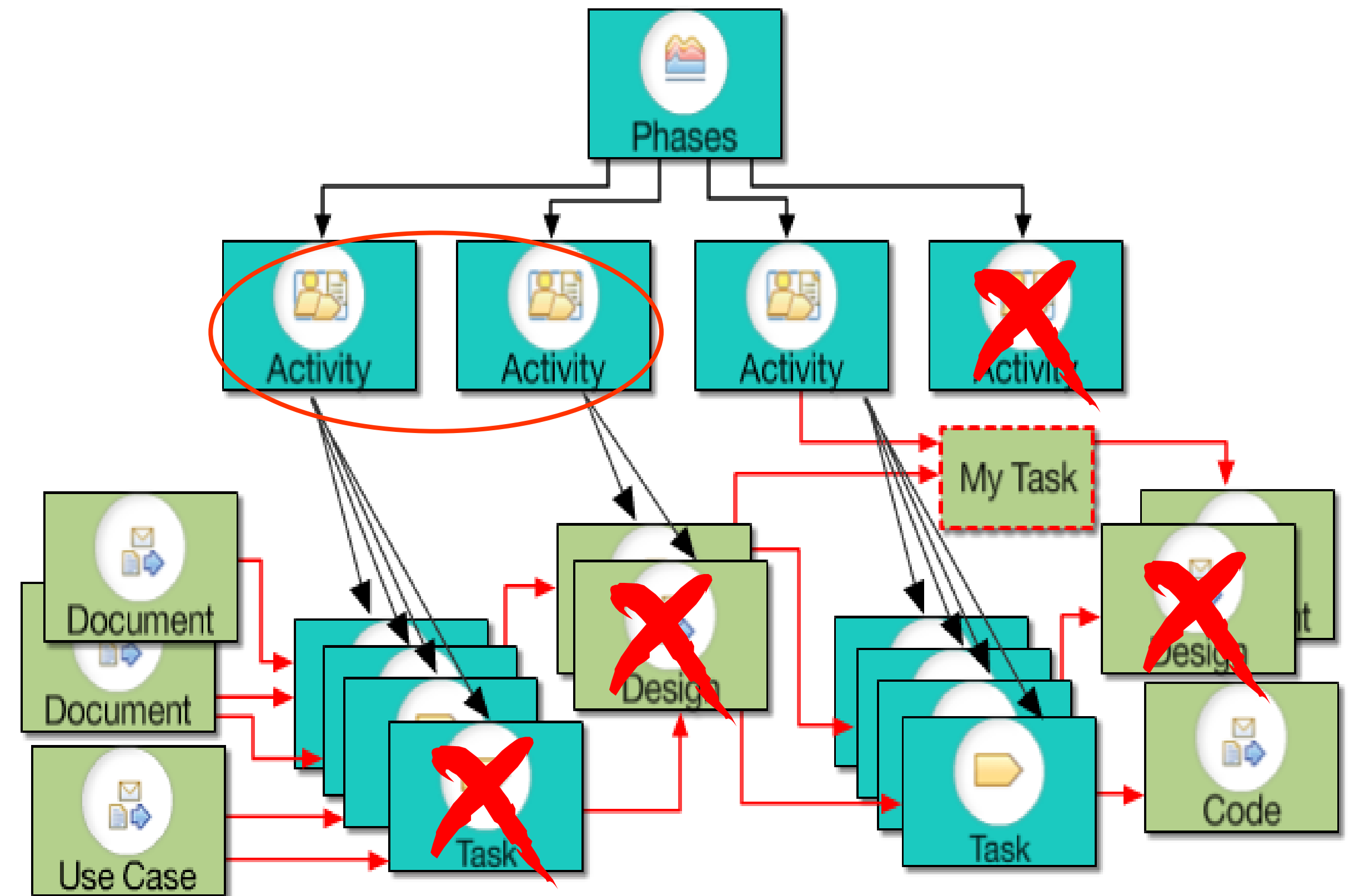
Role

Run MAW: Develop the initial Work Breakdown Structure

The selection of work products determines the initial Work Breakdown Structure (WBS).

Adapt the Method to your needs:

- Are there any work products that are produced iteratively that we only need to review once?
- Are there any activities or tasks we can eliminate?
- Are there any activities or phases we need to add?
- Are there any activities or tasks we can combine?

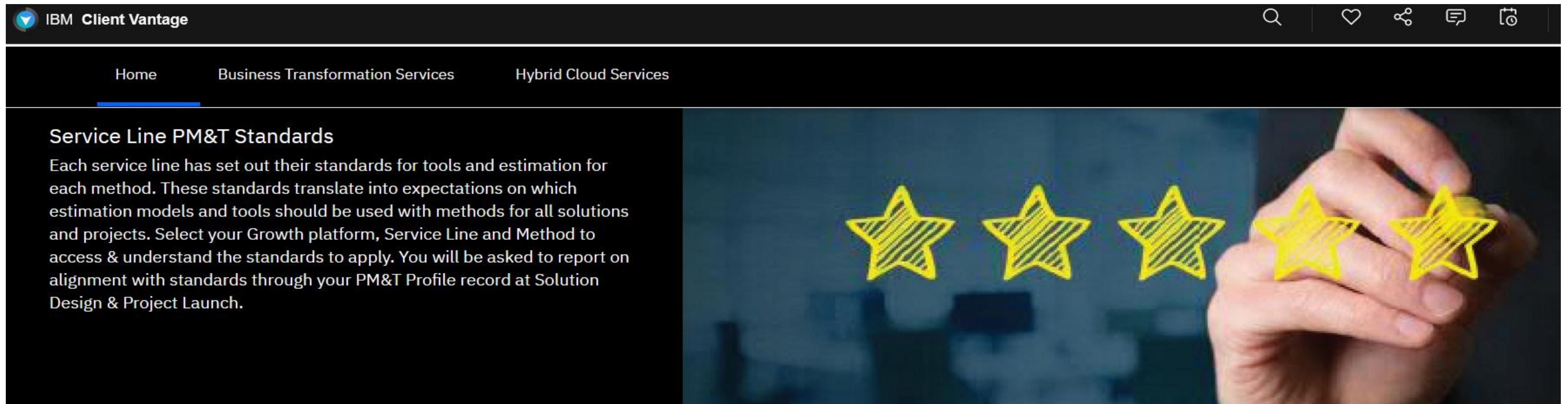


Identify the Tools & Assets (including GenAI)

Confirm Estimation Models

Please refer to [Service Line PM&T Standards](#) for:

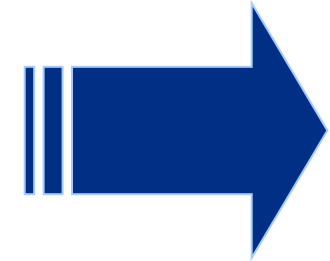
- Service Line Mandatory/Recommended Tools per Method
- Service Line Assets (including GenAI) as prescribed by the Method
- Service Line Mandatory/Recommended Estimation Models per Method



Situations and approaches

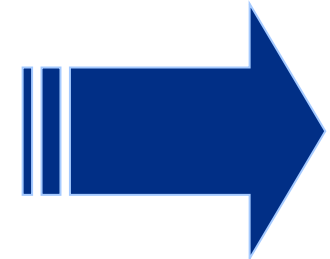
Typical situations faced in client engagements, and the approach you can use to tailor the Method for them:

1. The engagement requires a mix of different Methods.



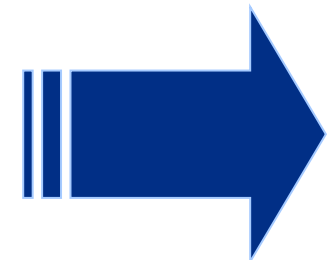
Choose a base Method that is closest to requirements and merge it with other required Methods. For more details see the chapter [**Multi-Method Tailoring.**](#)

2. You are starting an engagement in which the Solutioning and SoW were not developed with a Method, but using the Business Partner's own "cookbook".



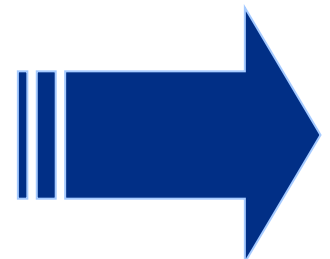
Choose a base Method that is closest to requirements, map the Solutioning results and the SoW content with the selected Method, identify the gaps and perform the tailoring as usual.

3. Your client has an existing Method and has mandated (by contract) that IBM will use that Method on the engagement.



Review the client's Method and perform a gap analysis with the corresponding IBM Method. If the client Method has any gaps, these need to be covered by IBM Method's guidance. For more details see the chapter [**Tailoring with Client-Mandated Assets.**](#)

4. A package vendor on the engagement has a Method and you have to perform your work within those boundaries.



Use the Method internally in the area you're responsible for and map the elements at the 'interface' between your work and the vendor's work.

MAW during Solutioning



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MAW during Solutioning (1/2)

Typical Roles Involved

- Solutioning Consultant / Engagement Manager
- Architect
- Other SMEs, if required

Portals

- [Method Workspace](#)
- [Service Line PM&T Standards](#)
- [PM&T Profile](#)

- Based on the IBM Consulting Offerings used in solution design, select the right Methods to build / deliver solution.
- As needed, perform a high-level Method tailoring exercise to scope delivery activities and define Tools & Assets (including GenAI), Estimation Models approach.
- Refer to [Service Line PM&T Standards](#) within the Method for Tools and Estimation Models. Please note that the Assets (including GenAI) are available within the Method Work Breakdown Structure (WBS).
- Generally, tailoring done during Solutioning is based on deliverables as the focus is on considering right outcomes to be produced as part of client solution. Also, it is important to consider that a Method SME and / or architect plays an important role on the tailoring decisions.

MAW during Solutioning (2/2)

- Methods tailored during Solutioning should be saved against the Opportunity number, on [Method Workspace](#). This tailored Method will be used as the basis for further tailoring during engagement Launch.
- Estimation activities should be executed as per the Estimation Models defined under the [Service Line Standards](#) for the Method. If historical data is available, it should be considered in the estimate. Visit [Global PM&T Estimation](#) portal to learn more.
- Tools and Assets cost (including GenAI) should be included in the overall cost estimate for the Opportunity. Also, tools considerations should be considered during solutioning by checking the [Service Line Standards](#) for selected Methods.

MAW during Delivery



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MAW during Delivery – Engagement Launch (1/2)

Typical Roles Involved

- Project Manager / Scrum Master
- Architect
- Other SMEs, if required

Portals

- [Method Workspace](#)
- [Service Line PM&T Standards](#)
- [PM&T Profile](#)

- Method Adoption is part of IBM Consulting engagement launch. Please refer to the [Project Journey Guide](#) for an on-line engagement launch portal.
- Identify Methods selected and tailored during solutioning ([Method Workspace](#) / [PM&T Profile](#)).
- If the engagement is classified as **complex or large non-complex typically $\geq 2m\$$ then Enhanced Project Launch (EPL) would be led by an external SME known as EPL SME** :
 - Please review [Enhanced Project Launch](#) portal to check the EPL applicability for the contract.
 - The [IBM Services Mosaic Method](#) should be used along with Service Line Methods. **Mosaic** helps deliver complex systems Integration and programs in a consistent and predictable manner, providing a complete solution framework to the implementation of a continuous development and operations life cycle and bringing together multiple stakeholder touch points.

MAW during Delivery – Engagement Launch (2/2)

- Confirm Method selection and update it as needed. If required, perform further tailoring based on contract / SOW and committed client deliverables, using [Method Workspace](#).
 - Add and/or remove Work Practices
 - Select the Work Products required to produce the committed deliverables
- Engagement or client specific Tools & Assets (including GenAI), as well as Estimation Models could be determined during Solutioning MAW and should be confirmed during engagement Launch (Delivery MAW).
- Please refer to [Service Line PM&T Standards](#) for more information about Tools and Estimation Models.
- Save the Method against the contract number on MWS & share for any approvals before finalizing the tailoring.
- Export the tailored Method and use as an input for the engagement plan
- During EPL the EPL SME should ensure that the Tools & Assets (including GenAI) are reviewed and analyzed thoroughly for implementation readiness and adoption. If there are any potential risks related to Method, Tools & Assets (including GenAI), skill gaps etc., that would impact adoption in delivery, then EPL SME should help with the identification of the risks and recommend mitigation strategy. The EPL SME should assess the improvement areas (for example suggesting potential use cases for automation leveraging GenAI assets that would improve productivity).
- For EPL, after the Method Adoption Workshop(MAW) is concluded, the contract brand PM should ensure that Enhanced Project Launch (EPL) tracking assessment for the contract is submitted in IPPF with all the relevant details from MAW.

MAW – Key Considerations



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Process Methods & Tools

Guidance for Tailoring

- If there is a **leading Service Line offering**, with associated Method, covering most of the outputs that you are intending to produce or most of the activities / tasks that you plan to carry out, this Method should be considered as the **base Method** for tailoring.

In order to ensure everything required to deliver the solution is included, tailor additional Methods or you can add to the base Method any other needed work practice and / or work product. For details see the chapter entitled [Multi-Method Tailoring](#).

- Ensure the tailored Methods have the Work Products desired to produce client deliverables and meets the completion criteria documented in the agreement / contract. Tools and Estimation Models selection are also part of tailoring. Please refer to [Service Line PM&T Standards](#) for more information about Tools, Estimation Models. Please note that the Assets (including GenAI) are available within the Method Work Breakdown Structure (WBS).
- At Solutioning Method Adoption Workshop (MAW) should consider preliminary risk assessment and during engagement Launch (the Delivery MAW) consider full risk assessment.

Adding new content

- You can add specific work practices into the base Method as part of tailoring, as needed. Please see also the chapter entitled [*Tailoring with Client-Mandated Assets*](#).
- If a work product required is not in the selected Method, add it in MWS as appropriate.
- When you select the output that you want to add, examine all the inputs (work products) that are required to produce that output and bring them in (with tasks).
- Add completely new work products that are not in any Method, along with the task which could produce that work product. Also identify any input that is required to produce this work product and add it in a similar manner.

Note:

- If you are tailoring the Method based on tasks, add tasks from other selected Methods or completely new, inserting them at appropriate positions, maintaining proper workflow.
- Feel free to share additional tasks and work products with the Method owner to consider for inclusion in the base Method!

Removing content

- Remove the tasks and associated work products (deliverables) from the base Method not required / applicable for your contract / engagement.
- Check if the work product you want to remove is identified as 'mandatory' input for any task that you have retained. If so, do not remove that work product and corresponding tasks.
- Check advice from the work product description, under Tailoring section. See 'Impact of not having' & 'Reasons for not needing' before removing.
- Record the reasons for important omissions and identify corresponding risks to agree with key stakeholder.

Note:

- Do not remove the GDPR, Security and Engagement Management tasks and work products during tailoring, as these are mandatory content for all engagements. If you believe you cannot cover these activities under your engagement scope, please reach out to the respective GDPR, BISO and PMCoE teams for further assistance.
- If you are delivering the engagement in an **agile** manner, tailoring could be initially useful for focusing on delivering the **Minimum Viable Product (MVP)** initially & then tailor the Method to produce the end client solution. Make use of the Method during various iterations / sprints based on feature stories agreed upon working closely with the client or product owners.

Garage alignment for IBM Consulting Methods

- [Method Workspace](#) is defined as the unique portal for Methods.
- IBM Garage is a bold, comprehensive approach to innovation, modernization and transformation that quickly creates and scales new ideas that dramatically impact client's business - and is an IBM strategic imperative. To help you adopt Garage using IBM Consulting Methods, all the Methods on [Method Workspace](#) are aligned to Garage.
- There are 2 approaches to Garage alignment within Methods on [Method Workspace](#):
 1. The first is where the Garage engagement model has been embedded in the Method and replaces the delivery lifecycle. In this case Garage specific content as well as Garage phases like Co-Create, Co-execute, Co-operate are included in the Method.
 2. In the second approach, the Method retains the original delivery lifecycle. Guidance on how to embed Garage in the Method is provided in the Method Overview page, allowing flexibility on how to use the Method in support of the Business Requirements.

Alignment with CMMI

- IBM Consulting Methods are aligned with CMMI Maturity Level 3.
- Work products to cover the gap from Maturity Level 3 to Maturity Level 5, if required, are available to be added while tailoring a Method.
- Please reach out to your Service Line or GIC CSE team for additional guidance.

Tooling and Asset Decisions important consideration

- Conduct Tool Orientation for the delivery team and the key client stakeholders. In the case of EPL Required engagements Tool Orientation should be facilitated by the EPL SME.
- The project team can seek advise from EPL SME and Other SMEs if required on the Tool and Asset (including GenAI) configuration. **Please note that the Assets (including GenAI) are available within the Method Work Breakdown Structure (WBS).**
- EPL SME can work with the project team and help putting up the Tool and Asset (including GenAI) deployment plan.
- If the MAW is not supported by EPL SME for any additional guidance on the Tools and Assets, please contact the Service Line Leadership team.

Method Adoption Workshop (MAW) while working remotely

Considerations for Method Adoption related activities in a Remote / Virtual Delivery Environment:

- Allow additional time for performing virtual activities
- Identify the risks related with virtual Method Adoption and manage mitigation actions
 - Distributed engagement team
 - Collaboration tools
 - Method education
 - Availability of client staff
 - Dependency on 3rd parties
- Engage Solutioning Consultant and Risk Management to identify where original solution assumptions may no longer be valid
- Establish a comprehensive plan for covering a virtual Method Adoption and make sure the required stakeholders are properly involved, covering the process as expected

Tailoring with Client Mandated Assets



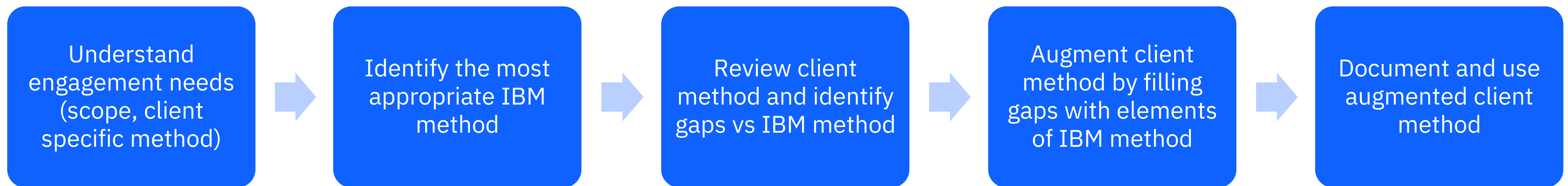
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Tips for tailoring with Client Mandated Assets(1/2)

There are situations in which the client mandates that an existing or 3rd party method is used on an engagement. Same examples of **client mandated** assets are: Templates, Workflows, Tools, Procedures, Roles, etc..

A similar situation might happen when, for a given contract, there also is a **third party (vendor)** involved, having its own Method, and we have to perform our work within those boundaries, so that we need to jointly define interfaces between the IBM's and vendor's common processes.

The recommended steps are:



Some additional tips:

- Involve Subject Matters Experts (SMEs), such as Architects, Tools Specialists, PM&T Team, etc as needed
- Engage the client and / or vendor and make sure that all the processes involving IBM are jointly reviewed and agreed

Tips for tailoring with Client Mandated Assets (2/2)

- If the contract refers to "**Managed Services**", IBM holds overall responsibility for the delivery, therefore IBM is in charge to establish the engagement process / framework.
- In the case of a **Manpower** engagement the client is fully responsible for engagement's planning, monitoring and control.
- Method work practices and work products that are **not impacted** by the client mandated assets will be always **fully adopted**.
- During the tailoring, any **client mandated asset**, which is not part of the IBM Method, can be added in [Method Workspace](#) using the "**+ Task**" (*custom work product*) option, under the **Work Breakdown** view.

Tailoring with Client Mandated Assets (1/2)

Scenario 1	Criteria for decision	TIPS
<p>Scope of contract covers Maintenance and Cognitive Process,</p> <p>The client requests the following:</p> <ul style="list-style-type: none">• Usage of YX Tool to record requests;• Promote to Production Process.	<ul style="list-style-type: none">• Evaluate YX Tool from client taking into consideration:<ul style="list-style-type: none">• Possibility of data extraction to monitor performance x SLA's;• All information required, such as, requester, severity, history log field, solution field, etc..• Evaluate Promote to Production process taking into consideration:<ul style="list-style-type: none">• Workflow process;• Tool to record changes to production.• Involve SME(s), when applicable.	<ul style="list-style-type: none">• It is important to read the contract / DoU / SOW and search for specific mention of usage of tools, procedures or any additional guidance to be followed by the engagement.• Conduct an assessment to understand the tool setup, monitor of requests and ensure that all metrics defined in the contract and at the organizational level can be collected.• Evaluate the process to be followed as requested by the client, to understand the process steps, tool to be used, templates to be used and ensure that training is provided to engagement team.• Based on decision, record all the identified risks, if applicable.

Tailoring with Client Mandated Assets (2/2)

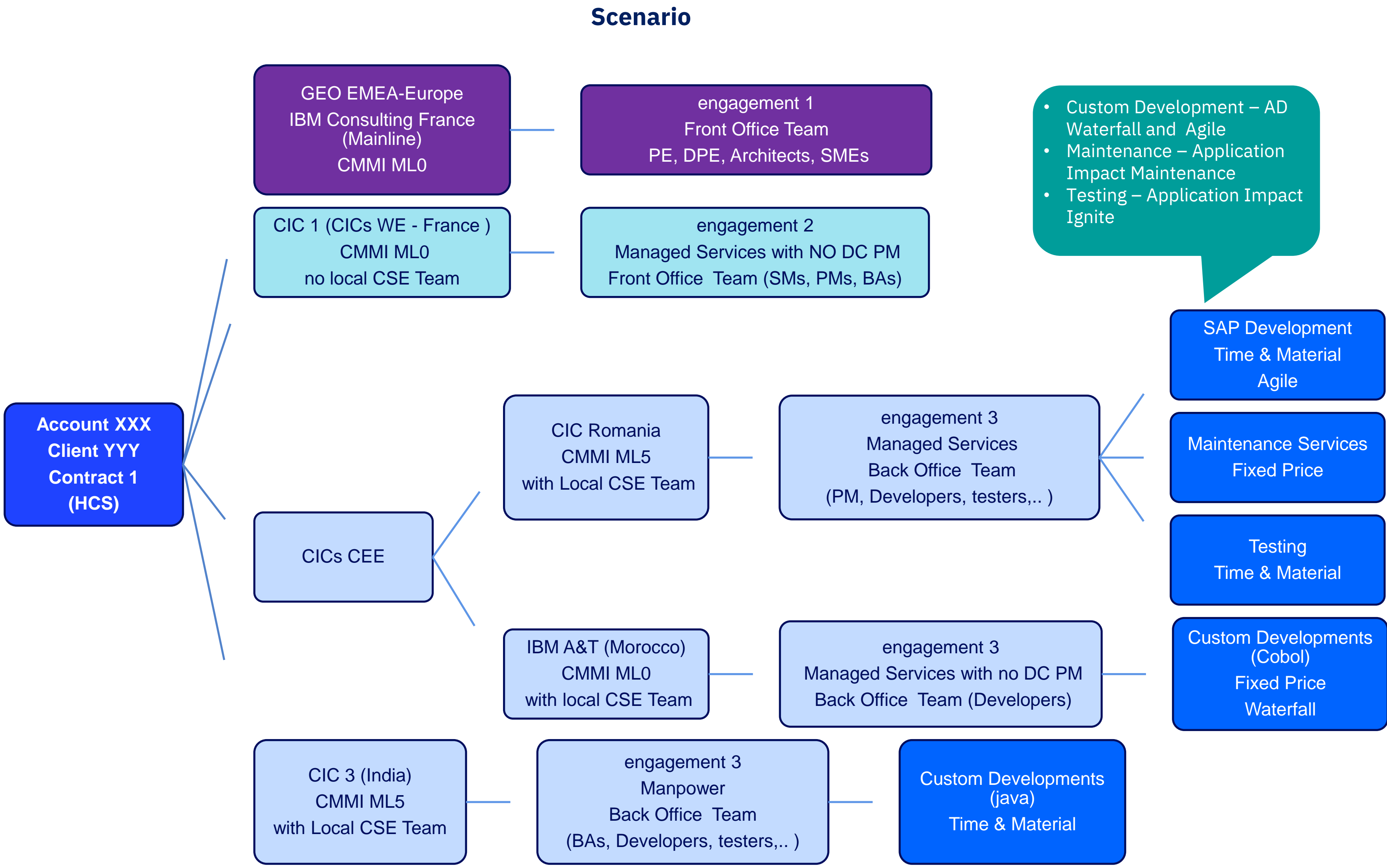
Scenario 1	Criteria for decision	TIPS
<p>Scope of contract covers Maintenance and Cognitive Process.</p> <p>The client requests the following:</p> <ul style="list-style-type: none">• Usage of RAID Log• Usage of engagement Status Report.	<ul style="list-style-type: none">• Evaluate the client's RAID Log taking into consideration:<ul style="list-style-type: none">• Minimum requirements of Risk;• Management Process, such as, probability, impact, mitigation plan, status, etc..• Evaluate engagement Status Report items requested by the client.• Involve SME(s), when applicable.	<ul style="list-style-type: none">• Check content of client's RAID Log template against standard tool defined by IBM for engagement.• Management to record and manage risks or Risk Log (ENG 436) template and include all the fields missing in client template.• Check the content of engagement Status Report template requested by the client against the IBM engagement Status Report and perform adjustments to consider client and IBM needs.• If necessary, conduct formal decision using Key Decision Record template (ENG 431) to be reviewed and approved by DPE, PM, PE or any other relevant stakeholder.• Based on the decision, record any identified risks, if applicable.

Multi-Method Tailoring



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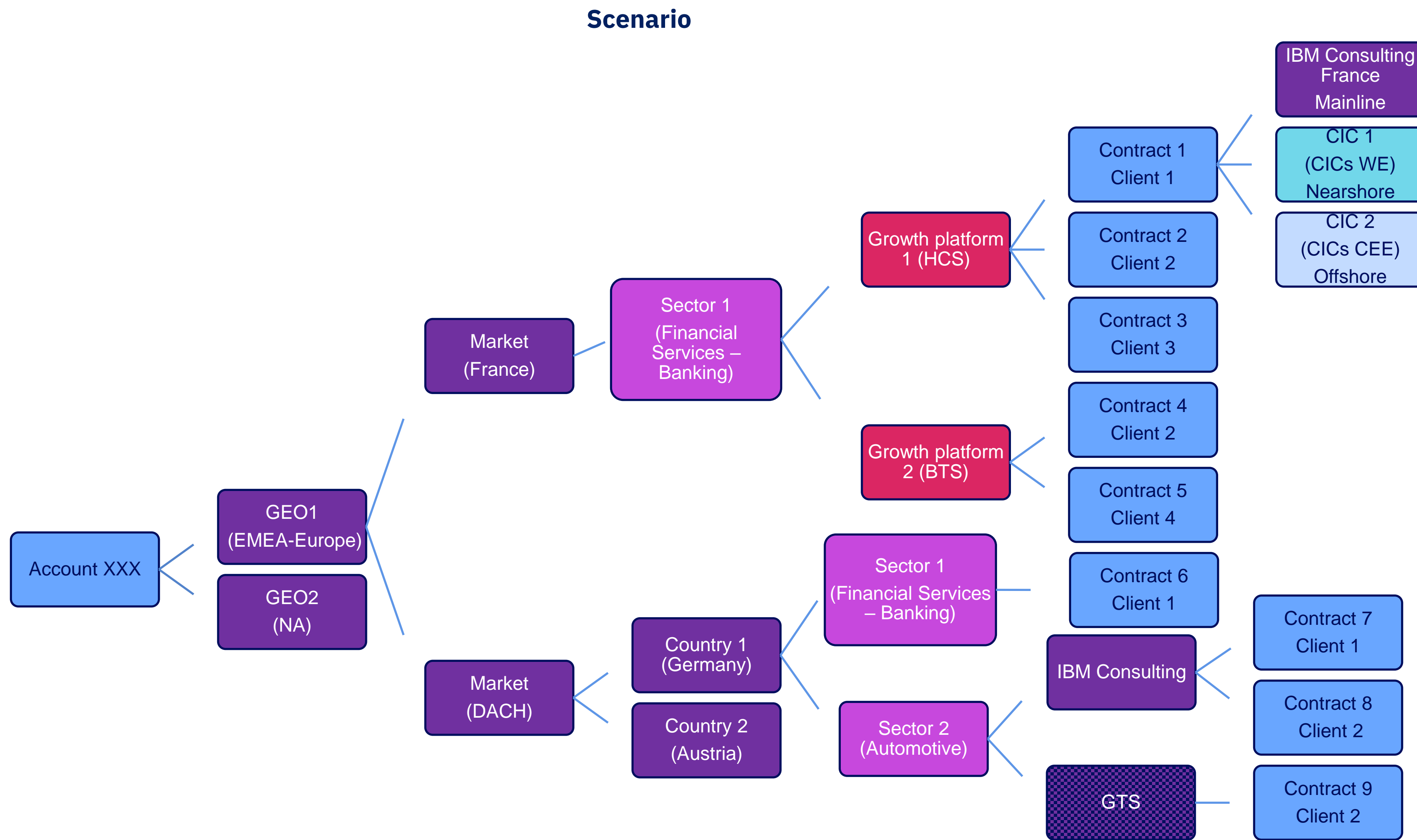
Multi-Method Tailoring - Scenarios



Approaches to Method tailoring:

1. Choose **one base Method** and add directly all the other required work practices to this Method.
2. Tailor **multiple Methods** for each service in the contract’s scope.
3. Tailor the **Mosaic** or **WWPM Method** for the engagement management activities and all the specific Methods for the services in scope.
4. One tailored Method instance at **contract / portfolio level**.
5. Multiple instances at **sub-engagements level** or at **client departments level**.
6. Keep at **GEO level** only the contract and financial management related processes and all the other work practices to be tailored at **CICs level**

Multi-Method Tailoring - Scenarios



Approaches to Method tailoring:

1. One tailored Method instance at **account / GEO / client / contract / Delivery Center** for each service in the contract's scope.
2. Multiple instances for each **contract / engagement / service**.
3. Use **Program Management Work Practices** or tailor the **Mosaic** or **WWPM Methods** for the program / engagement management activities, at any desired level, and all the specific Methods for the services in scope (removing the work practices / work products already included in the other tailored Methods.)

Multi-Method Tailoring - Criteria for decision

Consider the following when making your decisions:

- **SME's advice** (PM&T SME, Architect, Service Line,...)
- **(D)PE and PM's decision**, based on a risks assessment, taking into consideration criteria such as:
 - the Methods tailored during the solutioning phase
 - contractual constraints (client mandated assets, client organization,...)
 - the commonality of the delivered services across all the delivery centers
 - the homogeneity of the sub-engagements part of a portfolio

Notes:

- *Such contracts are usually classified as [Complex Programs](#) and may need to conduct an [Enhanced Project Launch](#) and to consider [IBM Services Mosaic Method](#) adoption.*

Multi-Method Tailoring - Tips

- During Method tailoring, in [Method Workspace](#), you can add to the selected base Method **work practices** from other IBM Methods using the “+ **Work Practice**” option from the **Work Breakdown** view, or you can add **work products** from other IBM Methods using the “+ **Task**” option from the same view.
- As you might be responsible for multiple contracts and / or engagements, we recommend the use of a clear **naming convention** for the different instances of a Multi-Methods contract, allowing you to easily search / identify the tailored Methods at any level, for instance:

Method name / Opportunity or Contract number / Client engagement name

- Based on your role (Delivery engagement Executive / Project Manager, Service Line Leader, Industry Leader, Delivery Excellence or Client Services Excellence Leader...) you can tailor and **share** the tailored Methods with your teams, to ensure an E2E consistent deployment of the PM&Ts at each organization level (service line / industry, contract, delivery center, engagement,...).

*Please note that the share Method option in [Method Workspace](#) creates a **copy** of the Method, therefore there will be **no automatic synchronization** between the original Method and the shared one.*

Acronyms



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Acronyms

MAW - Method Adoption Workshop

PM&Ts - Processes, Methods and Tools

WPL - Work Product List

SoW – Statement of Work

DoU – Document of Understanding

WBS – Work Breakdown Structure

EPL – Enhanced Project Launch

MVP – Minimum Viable Product

E2E – End to End

PM – Engagement Manager

PE – Engagement Executive

DPE – Delivery Engagement Executive

PMCoE – Project Management Center of Excellence

SME – Subject Matter Expert

CIC – Client Innovation Center

GenAI – Generative artificial intelligence

References



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References

- [Method Workspace](#)
- [PM&T Service Line Standards](#)
- [Method Adoption](#)
- [Enhanced Project Launch](#)
- [PM&T Profile](#)
- [Global PM&T Estimation Portal](#)
- [Project Journey Guide](#)
- [IBM Services Mosaic Method](#)



Backup

Change Control

Version	`	Date	Author	Circulation
5.0	Baseline Method Adoption Workshop Guidance	14/12/2020	Global PM&T Deployment Team	Method Workspace Page
5.1	Updated Method Adoption Workshop Guidance reflecting the updated links, multi-Method tailoring scenarios guidance	05/04/2021	Global PM&T Leader	Method Workspace Page
5.2	Updated Method Adoption Workshop Guidance with the updated content on Methods ,Garage Alignment and updated links	13/10/2021	Global PM&T Leader	Method Workspace Page
5.3	Updated Method Adoption Workshop Guidance to align with the IBM Consulting standard template and replaced GBS with IBM Consulting. Replaced SSM by Solutioning Consultant.	06/04/2022	Global PM&T Leader	Method Workspace Page
5.4	Updated several links and edited some text removing references to obsolete terms. Updated MWS images to make it in sync with the new look of the interface.	27/12/2022	Global PM&T Leader	Method Workspace Page
5.5	Updated the MAW Guidance to include the considerations for tooling decisions and some other changes to clarify the activities during MAW	20/10/2023	Global PM&T Leader	Method Workspace Page
5.6	Aligned to the latest IBM Consulting template. Refreshed the PM&T links	07/03/2024	Global PM&T Leader	Method Workspace Page
5.7	Updated the Method Adoption Workshop guidance to introduce the review of Assets (including GenAI) during MAW. Added Asset specific guidance. Updated EPL content to include the EPL Tracking mechanism in IPPF.	01/10/2024	Global PM&T Leader	Method Workspace Page