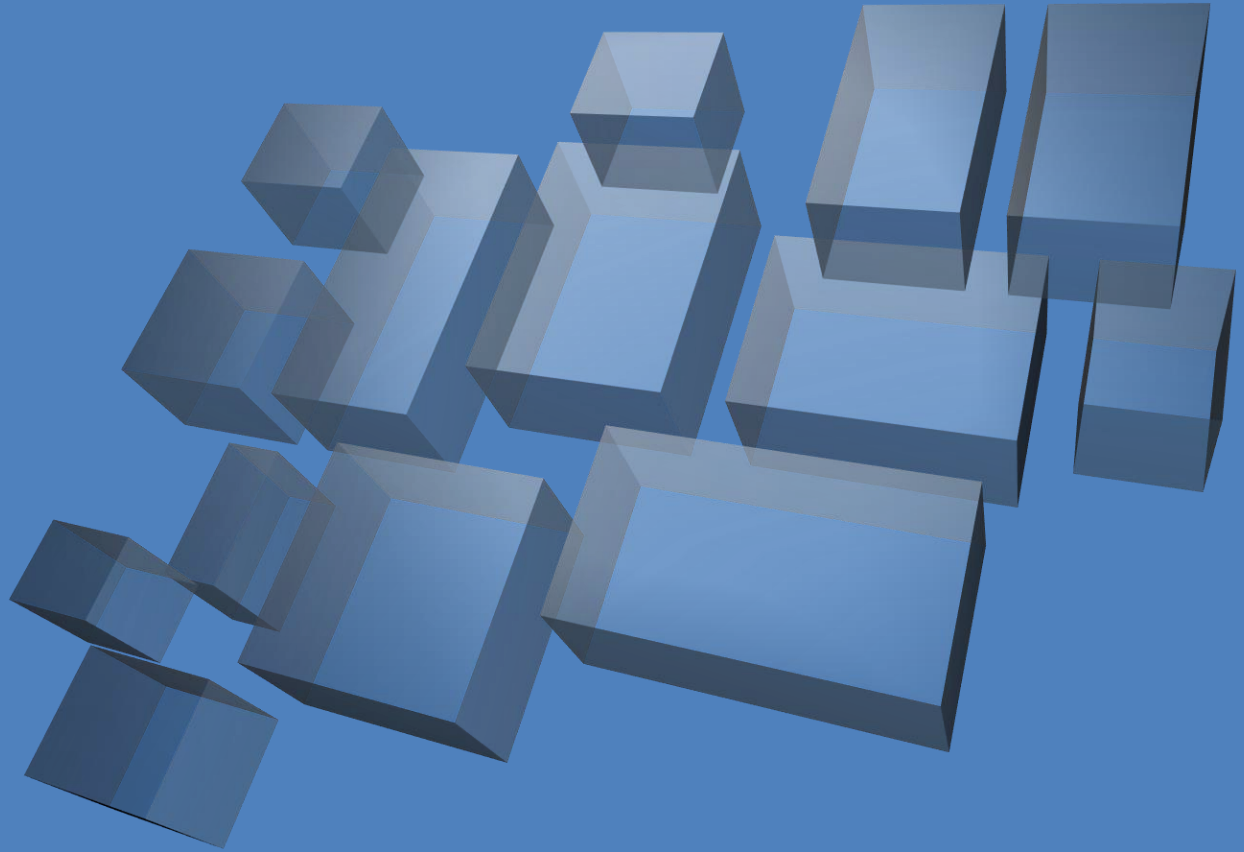


Work Samples

Mark Dattoli

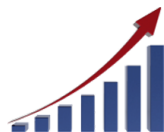


Contents

2	Strategic Planning
8	Portfolio Management
18	PMO
26	Budgeting
32	Metrics
41	Reporting
45	Roadmaps
50	Processes
58	SDLCs
66	SOA Strategy
69	Sourcing
78	Architecture
92	Models
97	Audits

Planning

A 3D rendering of the word "Planning" in a bold, sans-serif font. The letters are dark gray and have a slight 3D effect. They are placed on a circular, reflective platform that looks like a polished metal or glass disc. The platform has a thick rim and a smooth, reflective surface that mirrors the word above it. The background is a light blue gradient.



Turning Dreams into Reality



A template for strategic planning.

This template is organized around this “Implementation Equation”:

- Our team starts with a collective *DREAM*.
- A *DREAM* + *STRATEGIC PLANNING* leads to an *ACTIONABLE VISION*.
- A *VISION* + *COMMITMENT* + *EXECUTION* leads to *REALIZATION* of the *DREAM*.

Inspirational dreams—by themselves—do not lead teams to make the full commitment they will need to carry the dream forward to realization, especially when times get tough. Significant accomplishments need more than mere enthusiasm, good intentions, and heroic efforts. Rather, they need to be well planned and flawlessly executed. Following are the components of a professionally-designed strategic plan.

While these steps represent a lot of work, it lays out a comprehensive framework for challenging people to go beyond themselves—that which we as leaders are called to do. I would caution against removing any step until after we’ve carefully considered the risks in doing so.

Strategic Planning Process

Scoping. Determining what’s in and what’s out; fine-tuning the dream statement (as needed)

Cost-Benefit Analysis. Estimating the costs, both “to get to our dream” and “to live there” as well as the benefits, both quantifiable and intangible

Approval. Obtaining official approvals, funding & staffing

Staffing. Assessing/acquiring the requisite people and skills; and ensuring that work is effectively divided up based on backgrounds, qualifications, skills and passions

Milestones. Planning what major objectives need to be done, and in what timeframe

Work Breakdown. For each milestone, especially the next one, what key tasks need to get done, and in what sequence

Status Reporting & Review. Establishing how progress will be measured, reviewed and corrections made

Values/Priorities. Agree on what principles will drive our decision making, especially in crisis situations

Change Control. How mid-course corrections may be suggested; how approvals are made & communicated

Decision Making. Defining who has what authority, and delegating specifically-defined decisions to the lowest level possible to facilitate promptness

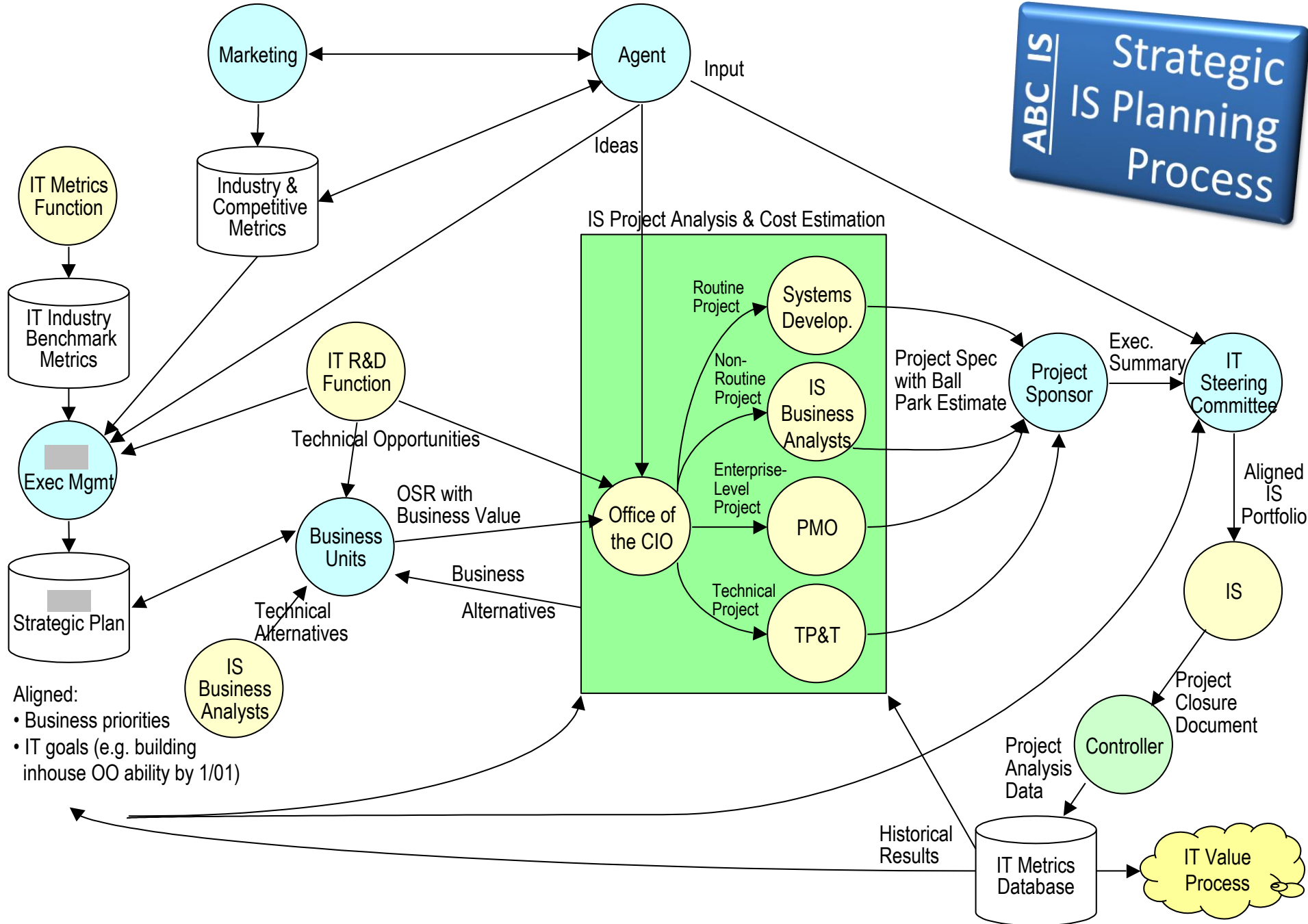
Contingency Planning. Backup plans for unpredictable events; plans for knowledge transfer of key skills

Quality Control. How we ensure delivered products meet our standards of acceptability

Project Planning. Detailed planning for each deliverable and milestone needs to be laid out (this task may be delegated to the individual team leads)

Strategic IS Planning Process

ABC IS



Responsibility & Assignment Matrix: *I.S. Planning*

Key Principles

Process / Step	Personnel				
	P.M.O.	C.I.O.	I.T. S.C.	I.S.	B.U.
PMO Foundations					
1 Establish & maintain a business case for the PMO	R	C	S		
2 Define the PMO's goals, roles & responsibilities, and key metrics	R	A	A		
3 Communicate the PMO message to Allied	R			C	C
4 Provide a single point of contact between Allied & I.S.	R				
5 Communicate documentation & PMO results with users & I.S.	R			C	C
6 Prepare monthly PMO status reports; Run weekly status meetings	R	C	C		
PMO Infrastructure					
7 Define & maintain the PMO methods and procedures	R	C	C	C	
8 Determine & document a standard set of tools & processes	R	C		D	
9 Coordinate processes, tools & skill sets with I.S.	R	C		D	
IS Strategic Plan & Business Alignment					
10 Identify potential projects capitalizing on technological opportunities		R		D	
11 Identify projects needed for marketplace or competitive reasons	R				D / A
12 Assess broad-based programs needed by AVL (e.g. CAMIS sunset)	R	D		D	D
13 Establish & maintain the IS Strategic Plan & Infrastructure Plan (See 23)		R		D	
Develop the IS Tactical Plan					
14 Analyze outstanding OSR's (IS work backlog)		R		D	
15 Break broad programs into projects; Identify inter-project dependencies	R				
16 Prepare gross estimates for projects (order of magnitude)				R	D
17 Propose priorities & draft Tactical Plan	R	D	C		
18 Review, adjust and/or approve Tactical Plan			R		
19 Communicate approved Tactical Plan to Allied & IS	R			C	C
Monitor & Maintain the Tactical Plan					
20 Schedule & chair regular Steering Committee meetings		R			
21 Assess status of active projects:	D		R	D	D
(a) Adjust user involvement, if necessary			R		
(b) Adjust project plans & schedules, if necessary			R		
(c) Approve additional funds, if appropriate			R		
22 Review/Approve OSR's & assess priorities of projects awaiting kickoff			R		
Assess Effectiveness					
23 Re-package & re-present the IT Strategic Plan annually	D	R	S	D	D
24 Assess the effectiveness of the PMO annually	D	D	R		
25 Prepare PMO's annual budget	R	A	S		
26 Assess quantifiable & financial results of all completed projects	R	D	C	D	D

- The PMO is responsible to ensure that IS is aligned with the business, and that IS is communicating and functioning well with the business units.
- The PMO serves as a single point of contact between the business units and IS.
- The IT Steering Committee is responsible to approve the plans of IS and the PMO, and to coordinate the business unit staffing and funding for projects.
- The Steering Committee also monitors the status of IS projects including those of the PMO.

Responsibility Codes

- C** Copy (keep informed)
A Agree to
R Primary Responsibility
D Discuss, Consult, Provide input to
S Sign off or approve

Personnel Codes

- P.M.O.** Program Management Office
C.I.O. Chief Information Officer
I.T.S.C. The I.T. Steering Committee
I.S. The IS Department
B.U. Business Units

Communication & Review* of Key IS Documents

Document/Contents	Reviewed in Month:	J	F	M	A	M	J	J	A	S	O	N	D
PMO Charter (see "PMO Handbook"). Mission, Structure, Roles & Responsibilities, Operating Principles					S								
IT Charter (see TIPS sections 3, 4, 5). Mission, Vision, Values, Roles & Responsibilities, Key Metrics					S								
IT Strategic Plan (see TIPS sections 2, 6, 7, 9). Systems Migration Plan, Technology Selection, IS Organization, Communications Strategy					S								
IT Annual Plan (see TIPS section 8). Budget, Annual Goals, Target Metrics												S	
IT Tactical Plan (see outstanding OSR's). Project Dependencies, New Project Priorities		S	S	S	S	S	S	S	S	S	S	S	S
Sys. Dev. Active Projects Status Report (see "newlog"). Statuses, Personnel, Benefits, Issues, Recommendations		S	S	S	S	S	S	S	S	S	S	S	S
Allied Way Active Projects Status Report (see). Budget Status, Schedules, Impacts, Change Statuses, Risks		P	P	P	P	P	P	P	P	P	P	P	P

* To "review" means to assess the results of the previous period,
and to approve (or adjust) the plans for the next period.

Key: **S**=Reviewed by IT Steering Committee;
 P=Report reviewed monthly (projects weekly) by PMO sponsors & leads

Project RAM

(based on PMO Handbook, pages 14-16)

	M #	BO	BM	PMO	BA	Meth Ld	Perf Ld	Del Ld	ISPM	ITSC
Identify business opportunity		R								
Assign business manager		R	A							
Assign business analyst				R	A					
Develop project spec	1	S		S	R					
Determine if IS is needed (IS)	2	S		S	R					
If (IS): Assign IS project manager								R	A	
Develop business case (60%)	3	S	R	S			D / A			
Present to ITSC		R								S
Develop project plans			R	A						
Create dashboards & scorecards						R				
Develop detailed business requirements	4	S		S	R					
Design business application / process	5	S		S					R	
Develop implementation plan	9	S	R	S						
Revise business case (90%)	6	S	R	S			D / A			
[If not within 15%]: Re-present to ITSC		R								S
If (IS): Develop & test system	7								R	
Perform user acceptance test	8	S	R	S						
(If data needed): Acquire/Load data									R	
Execute implementation plan	10		R							
(Ongoing) Provide data for scorecards							R			

Legend

M #	Milestone # as shown in PMO Handbook
BO	Business Owner
BM	Business Manager
PMO	Program Management Office
BA	Business Analyst
Meth Ld	Methods & Standards Lead
Perf Ld	Performance Lead
Del Ld	Delivery Lead
ISPM	IS Project Manager
ITSC	IT Steering Committee

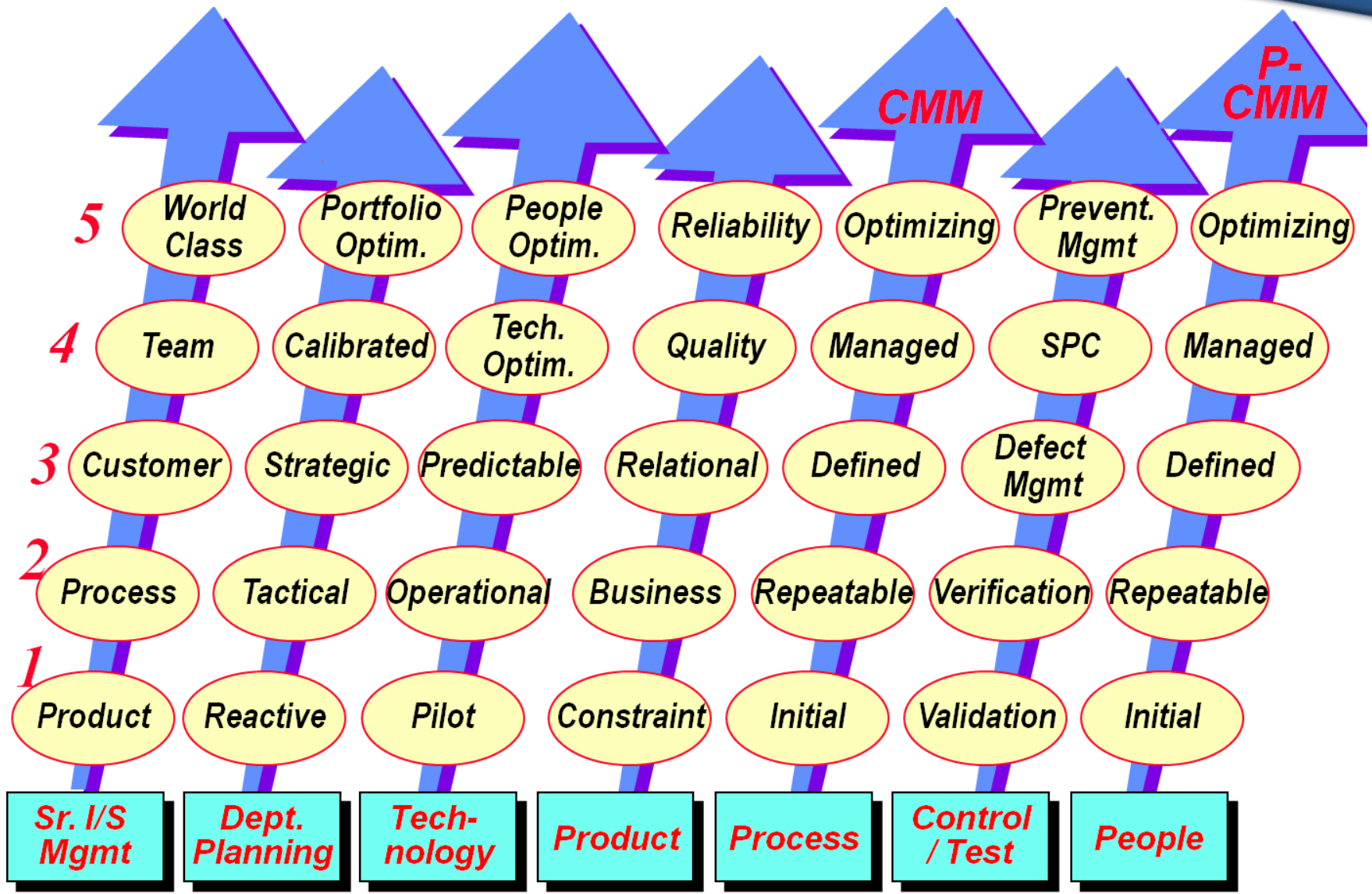
Responsibility Codes

C	Copy (keep informed)
A	Agree to
R	Primary Responsibility
D	Discuss, Consult, Provide input to
S	Sign off or approve



Portfolio Maturity Model

ABC IS



Total \$ Hard-Dollar Benefit (000's)	Total \$ Cost (000's)	Total Project Hours (000's)	Payback (Years)	Internal Rate of Return (%)	Net Present Value (\$000's)	Total Points of Columns G1 – G15	L.O.B. Penetration	Shipment Volume Affected	# of Tariffs Affected	Improved Service to Agents	Improved Service to End Customer	Business Simplification	Market Presence	Competitive Advantage	Future Obstacles Avoided	Project Simplicity	Aligned with AVL Business Acumen	Risk Avoidance	Other Intangible Benefits
--------------------------------------	-----------------------	-----------------------------	-----------------	-----------------------------	-----------------------------	----------------------------------	--------------------	--------------------------	-----------------------	----------------------------	----------------------------------	-------------------------	-----------------	-----------------------	--------------------------	--------------------	----------------------------------	----------------	---------------------------

A	B	C	D	E	F	G	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12	G13	G14	G15
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N/A	N/A	N/A
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N/A N/A N/A

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Uses
a
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dot
scale
of
impact

0=None
1=Low
2=Med
3=High

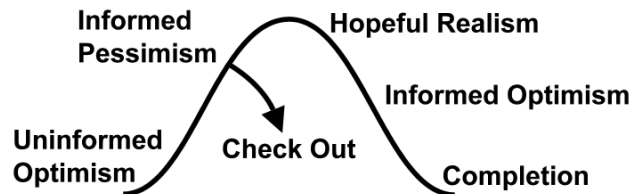
Project Pacing Calendar

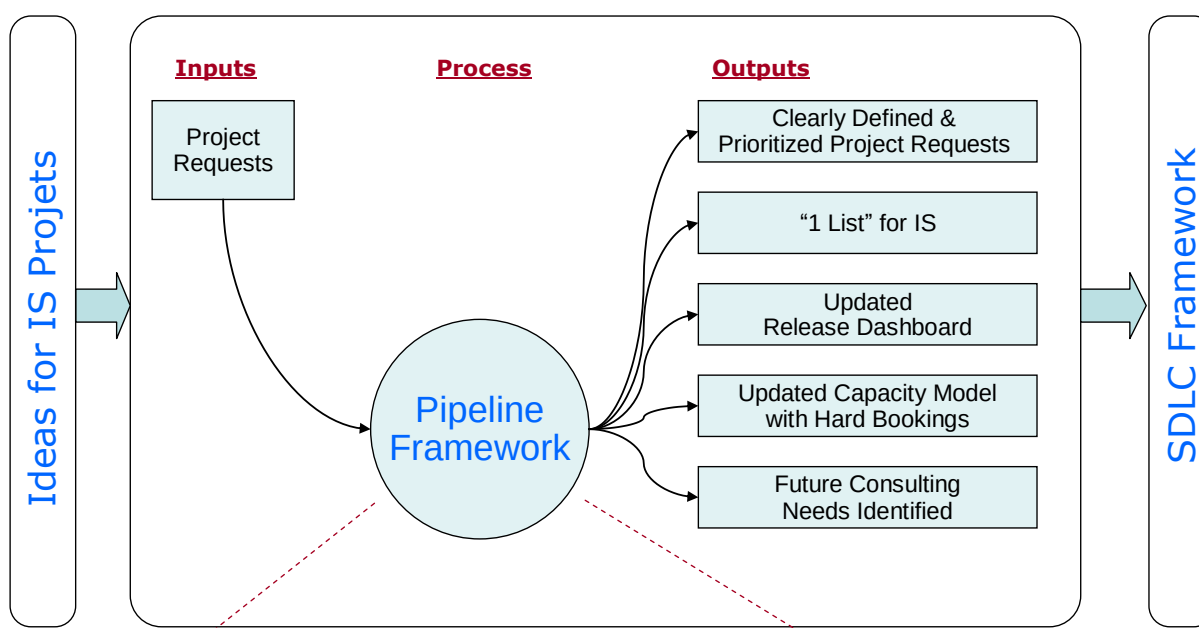
ABC IS

= Development
 = Install and Roll Out
 \$\$ = Benefits Begin

Project	Change Index: Development / Roll-Out	'98 Q1	Q2	Q3	Q4	'99 Q1	Q2	Q3	Q4	'00 Q1	Q2	Q3	Q4	Change Status	Risks
Foundational Projects															
• AW End Vision	36 / 40													Informed Pessimism	Budget; Acceptance
• Technical Architecture	37 / 37													Hopeful Realism	Budget
Completed Projects															
• WAN	33 / 35													Completion	
• MTMC	29 / 34													Completion	
• Layers (Release 1)	31 / 37													Completion	
• Move Mgmt (Release 1)	29 / 36													Completion	
Active Development Projects															
• Move Mgmt (Release 1.5)	19 / 21													Uninformed Optimism	Conv. conflicts with busy season
• Bottom Line	16 / 15													Hopeful Realism	Benefits; Budget; Data Acquisition
Active Technical Projects															
• EMS Replacement														Uninformed Optimism	Training; Change
• Technical Infrastructure	36 / 31													Uninformed Optimism	Budget
Planned Projects															
• Layers (Release 2)	31 / 37													Uninformed Optimism	Budget
• Move Mgmt (Release 2)	32 / 39													Uninformed Optimism	Budget; R & R Work
• Data Capture: Rewrite	36 / 40													Uninformed Optimism	Benefits; Scope, Performance
• Billing – PeopleSoft	37 / 38													Uninformed Optimism	Agent Expectation (Not for them)
Fixed Factors		0	42	24	22	0	42	24	22	0	42	24	22	Fixed factors account for busy season, contract renewals & conventions	
Totals, by quarter		93	166	209	232	277	360	339	299	224	227	132	22	Totals include project indexes and fixed factors	
							↑	↑						Change Index from "Predicting the Impact of Change", © O. D. Resources	

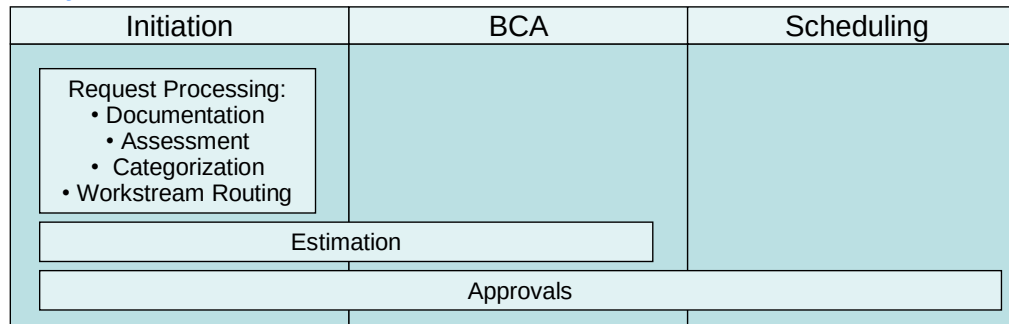
The Change Curve



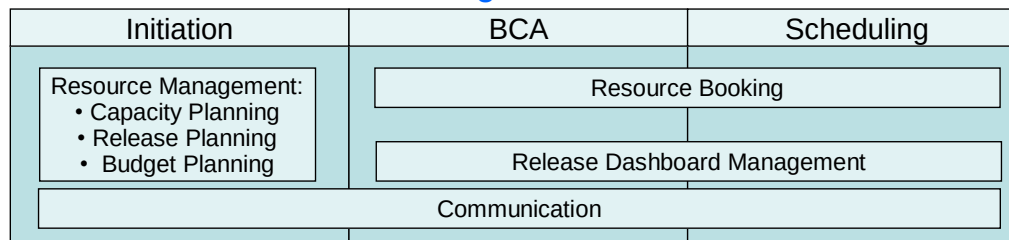


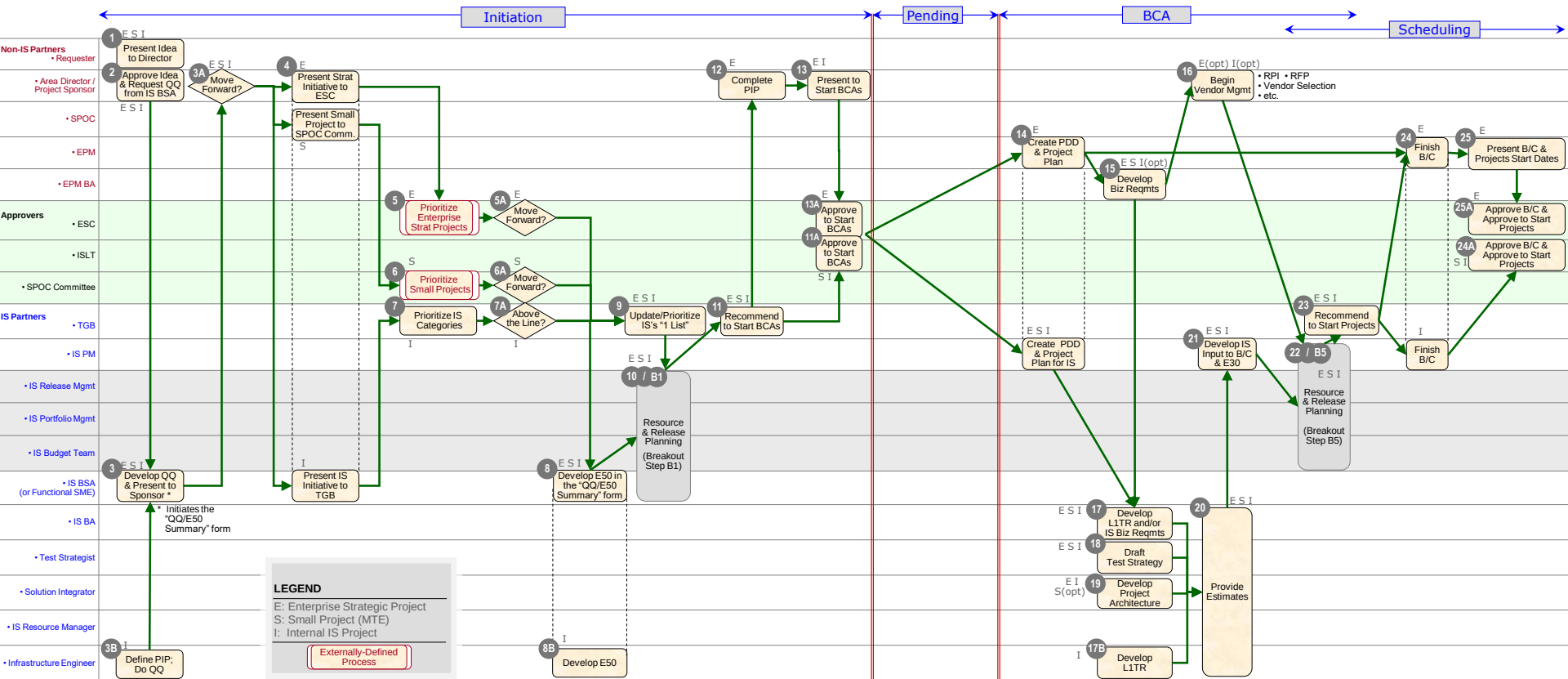
2 Key Functions of the Pipeline Framework:

A. Project Prioritization

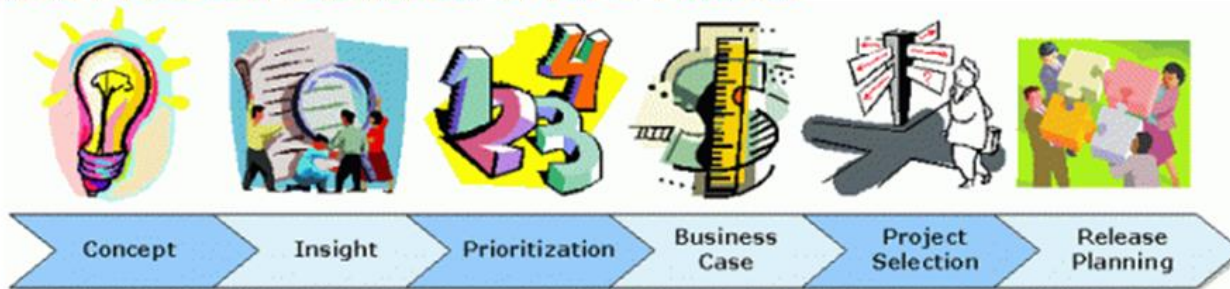


B. Resource & Release Planning

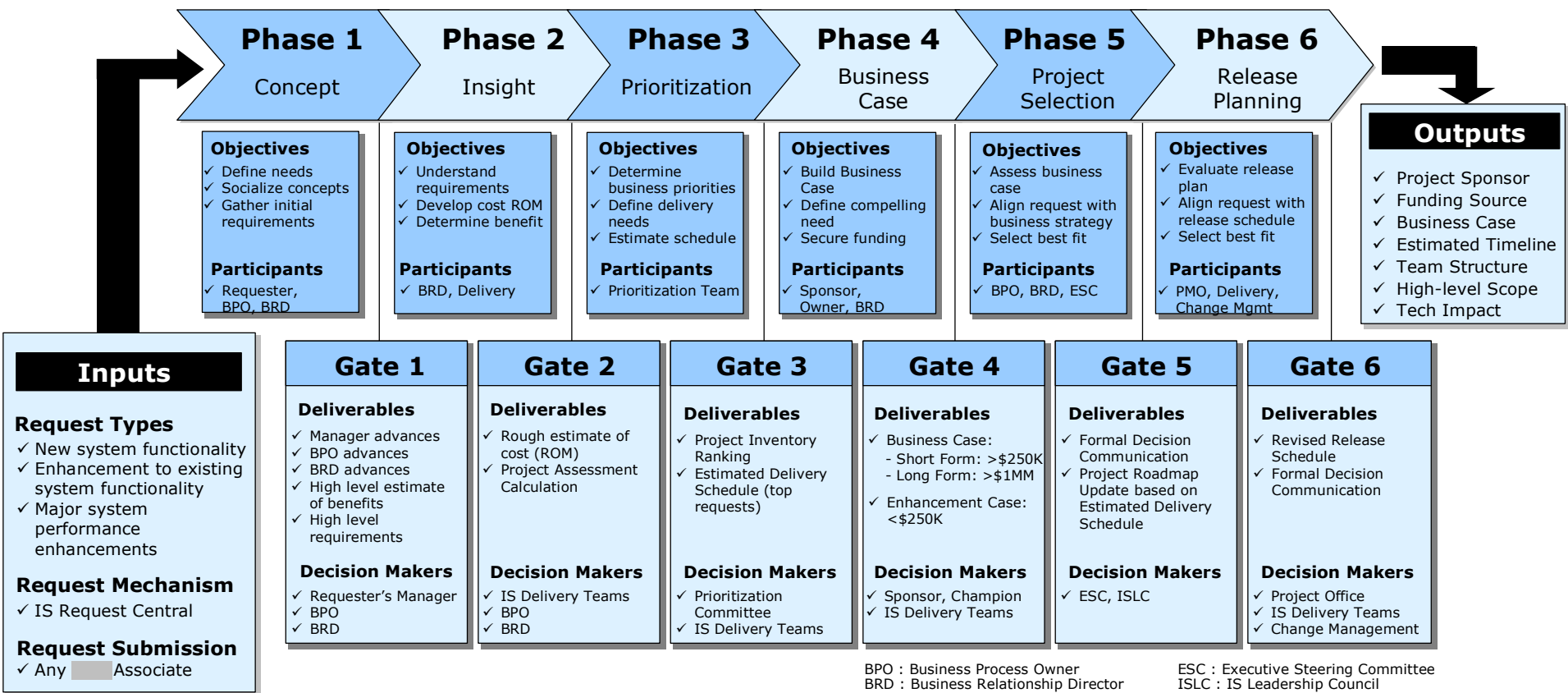




The PAR Process: Overview of its 6 Phases



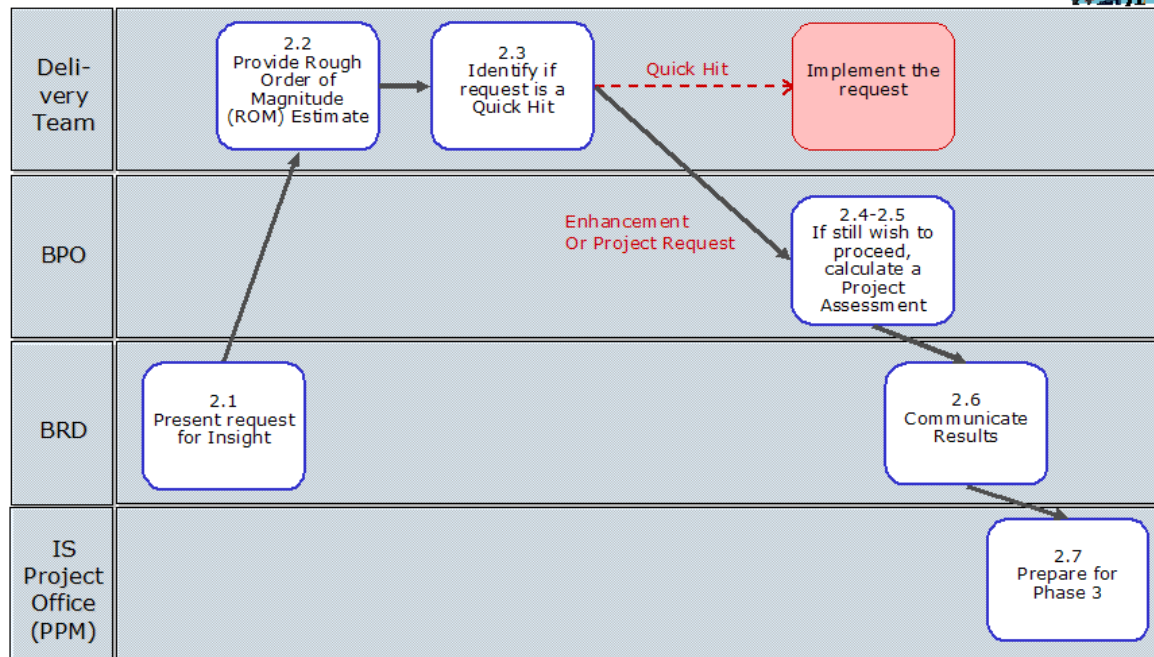
ISSLC Stage 1 The Project Assessment & Review (PAR) Process v 1.0



BPO : Business Process Owner
BRD : Business Relationship Director

ESC : Executive Steering Committee
ISLC : IS Leadership Council

Phase 2: Insight — Process Flow



Phase 2: Insight — Roles & Responsibilities



Type	Step	Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager
	2.1. Present request for Insight				R				F	
	2.2. Provide ROM estimate					R			F	
	2.3. Identify Quick Hit			A	D	R,S			F	
	2.4. Decide to proceed	D	D	R,S						
	2.5. Rate Project Assessment Calculation	D	D	R					F	
	2.6. Communicate results	C	C	C	R	C	C		F	C
	2.7. Prep for Phase 3				D	D			R	

Insight – Worksheet as of 11/4/03

[illegible]

IT Strategy & Planning

- Coordinate process development & maintenance
- Coordinate prioritization meetings
- Communicate priorities
- Coordinate measurement
- Monitor status reporting

BRDs

- Monitor:
 - Business direction & needs
 - Application utilization
 - Customer satisfaction
- Educate the business
- Make suggestions
- Coordinate business request submission
- Define processes:
 - Project initiation
 - Prioritization
 - Service level management
 - Measurement
 - Reporting
- Define roles & responsibilities

Business

- Estimate benefits
- Plan solutions
- Document project needs & alternatives
- Define high-level requirements

- Identify project inter-dependencies
- Obtain executive direction
- Plan preliminary schedules

- Plan strategy
- Identify needs
- Make requests
- Manage budget
- Sponsor projects
- Provide project funds
- Provide resources





Home Page

USC Program Management Office

[PMO](#) | [Planning](#) | [Programs](#) | [Projects](#) | [Framework](#) | [SDLC](#) | [Reference](#)

FYI

The PMO is managed by Randall Forester. Contact him by:

- [Email](#) or
- Phone: 773 399-4390

Associates

PMO team members include:

- Armando Reyes
- Jennifer Temple

Welcome to the Program Management Office

You are at the home page of the **Program Management Office**, also called the **PMO**. The mission of the PMO is to ensure success in all project management activities within **IS**.

The links above will take you to various PMO-related sites and documents:

PMO

The PMO handbook, training materials, and current status reports.

Planning

Strategic & Tactical planning process documentation, ISR & AWG documentation, and the IS Resource Management home page.

Programs

A list of the currently active programs, and their status reports.

Projects

A list of the planned and active projects, and their status reports. Also, the Project Management standards home page, and the project Time Reporting standards.

Framework

A description of the project framework followed in IS.

SDLC

Information on the Systems Development Life Cycles followed by IS, and related standards.

Reference

The Repository of Best Practices followed by IS, including all technical standards.

Index**Best Practices Repository****CONTENTS****PMO**

- [General Information](#)
- [Program Management](#)
- [Project Management](#)
 - [General Project Management](#)
 - [Resource Capacity Planning](#)
 - [Vendor Management](#)

Systems Development Life Cycle

- [General Information](#)
- [Practices & Techniques](#)
 - [Iterative Development](#)
 - [Requirements](#)
 - [Testing](#)
 - [The UML, Use Cases, etc.](#)
- [Life Cycle Variants](#)
 - [RAD](#)
 - [RUP, Agile Development](#)

IT Measurement & Metrics

- [TBD](#)

FYI

PMO stands for the Program Management Office, an IT industry best practice for ensuring success in large and small projects.

Gartner & Meta

The GartnerGroup, who is referred to often in this repository is a consulting firm specializing in analyzing IT industry trends. MetaGroup is a similar company.

PMO**General Information**

- [The Program Management Handbook](#) [.doc]
- [Gartner Group on the Project Office](#) [.doc]
- [AscendantOne on PMO Principles](#) [.pdf]
- [Teratec on the PMO](#) [.pdf]

Program Management

- [MetaGroup on Portfolio Management](#) [.pdf]
- [PlanView on Portfolio Management](#) [.pdf]
- [Portfolio Management & Stabilizing Risk](#) [.doc]

Project Management**General Project Management**

- [PMI PM-BOK \(PM Body of Knowledge, 1996 edition\)](#) [.pdf]
- [GartnerGroup on Reducing Project Risk](#) [.pdf]
- [GartnerGroup on Project Mgmt for Small/Medium Businesses \(SMB\)](#) [.pdf]
- [Change Management](#) [.pdf]
- [Yourdon on Extreme Project Management](#) [.pdf]

Resource Capacity Planning

- [TBD](#)

Vendor Management

- [Vendor Management at USC](#) [.doc]
- [Managing Outsourced Projects](#) [.doc]
- [Software Acquisition Capability Maturity Model](#) [.pdf]
- [Outsourcing Trends 2003](#) [.pdf]
- [Outsourcing IS Functions](#) [.doc]
- [Outsourcing Strategies \(from the State of Texas\)](#) [.pdf]

[^ Top](#)**SEI CMMI**

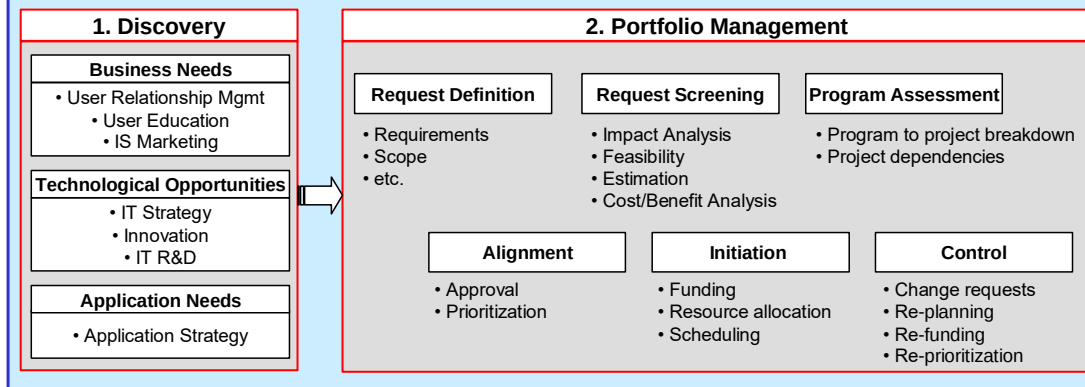
The SEI CMMI, which is

Systems Development Life Cycle**General Information**

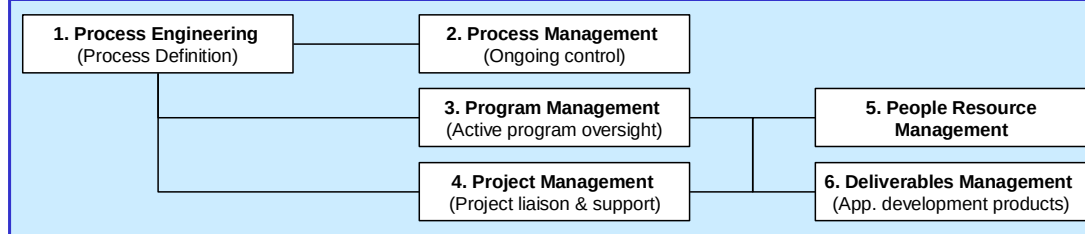
- [IT Industry Best Practices for SDLC](#) [.doc]



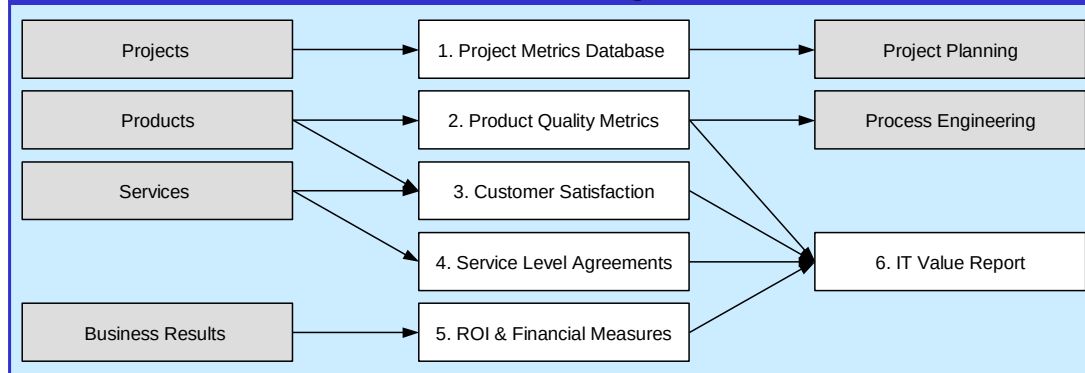
A. Demand Management



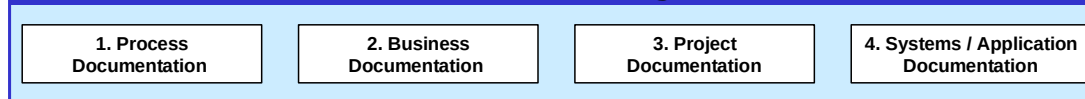
B. Supply Management



C. Results Management



D. Document Management



Project Request

- Preliminary Scope
- High Level Requirements

- ROM Benefits
- ROM Costs

Charter

- Approval to Proceed

Business Initiative Definition

Scope Statement

- Approach/Strategy
- WBS
- Objectives / Requirements / Product Description
- Deliverables
- Scope Mgt Plan (Change Control Process)

Scope
Baseline

Business Case

Benefits

- Revenues
- Cost Savings

Project Pricing

- Pricing

Ongoing Expenses

- Expenses

Standard Financial Model

- Income Stmt & Valuation
- Impact to Key Drivers

Cost
Baseline

- Run Rate "S" Curve

Activity Costs

- Costs

Other Schedule / Cost Related

- Staff Requirements & \$ Effort
- Milestones & Target Dates

Schedule
Baseline

- Project Schedule

Process Related

- Approvals

Subsidiary Management Plans

- Risk Mgt Plan; Risk Response Plan
- Schedule, Cost, Staffing, Communications, Procurement Mgt Plans

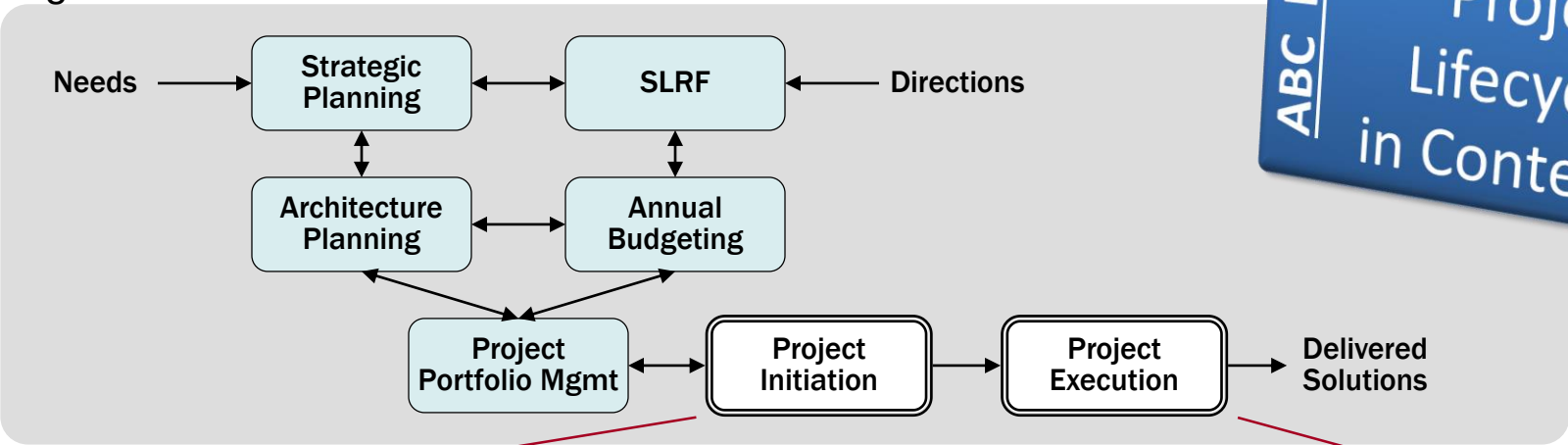
Other

- Open Issues and Pending Decisions

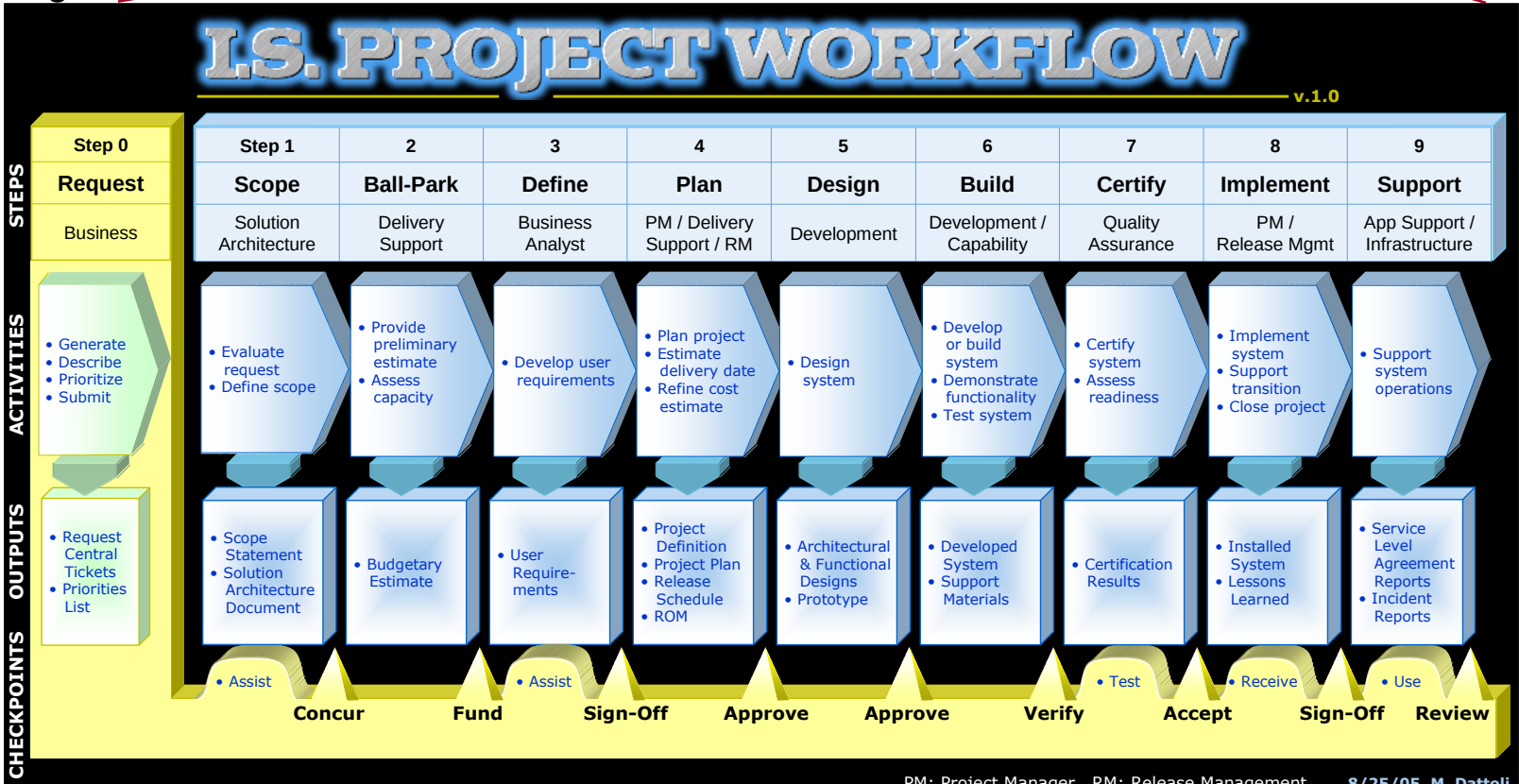
* See:

Business Initiative
Definition and PMBOK
© 2000, especially p. 45

Context Diagram



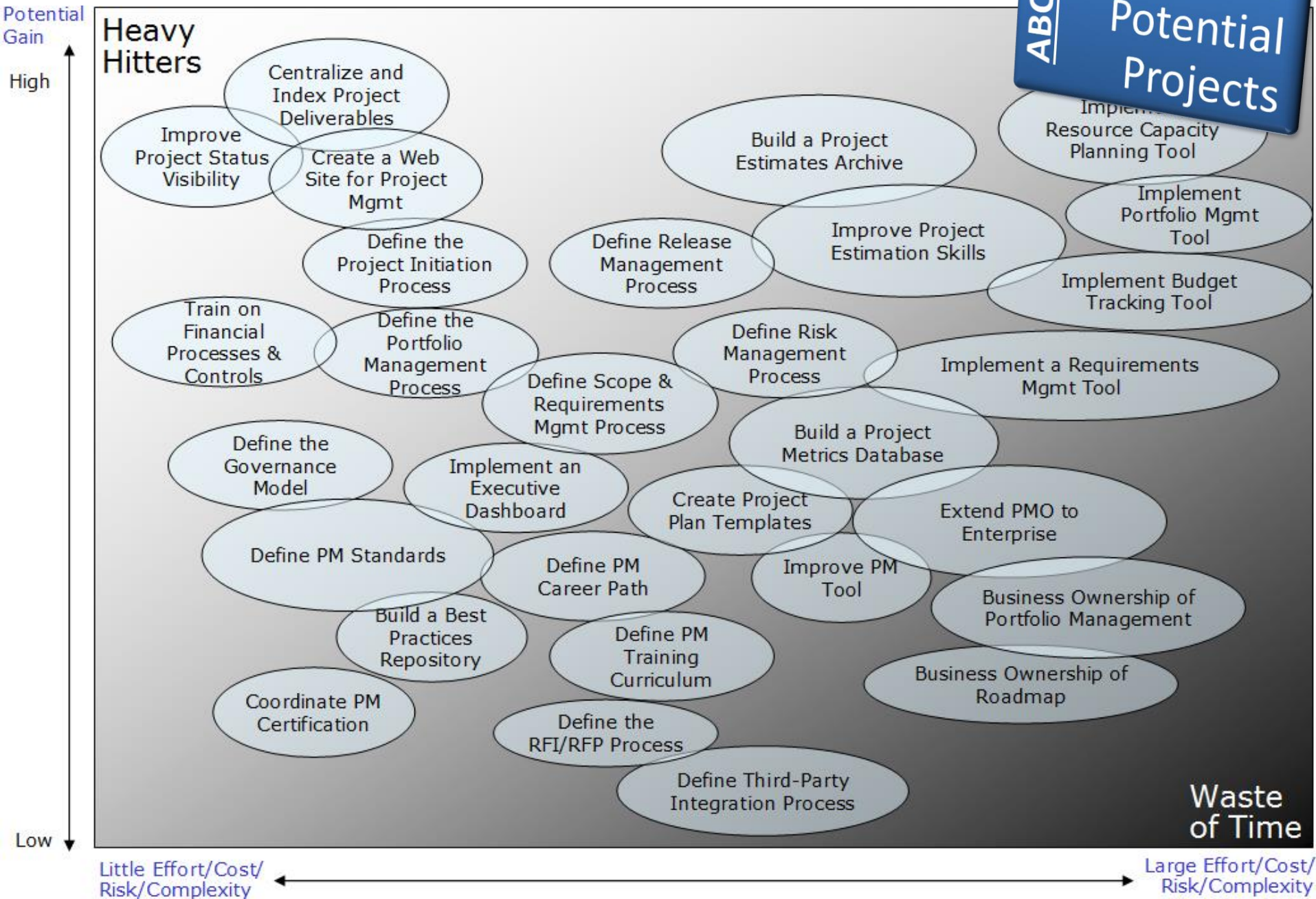
Overview Diagram



PMO
Potential
Projects

ABC IS

Implement
Resource Capacity



ABC IS A Generic Planning Model

Respect the Past - Historian -

History of:

- Program
- Context
- Involved personnel
- Related elements

Manage the Present - Manager -

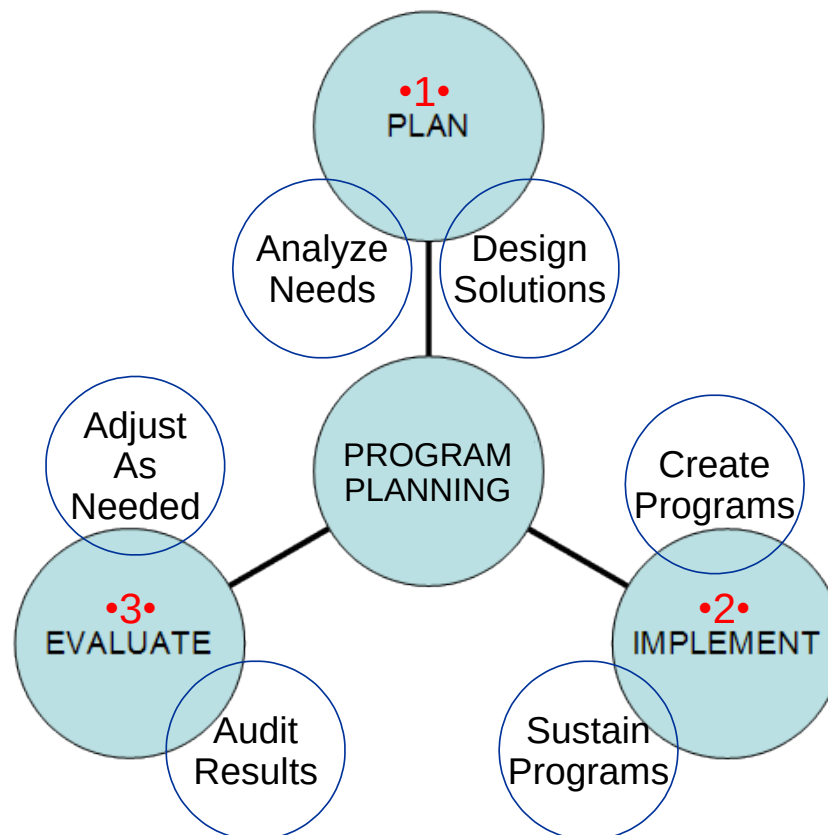
Manage:

- 3M's: Man, Machinery, Money
 - Activities: Plan, Organize, Staff, Direct & Control
- Lead:
- Vision, Communication, Integrity

Secure the Future - Futurist -

Prepare for the future:

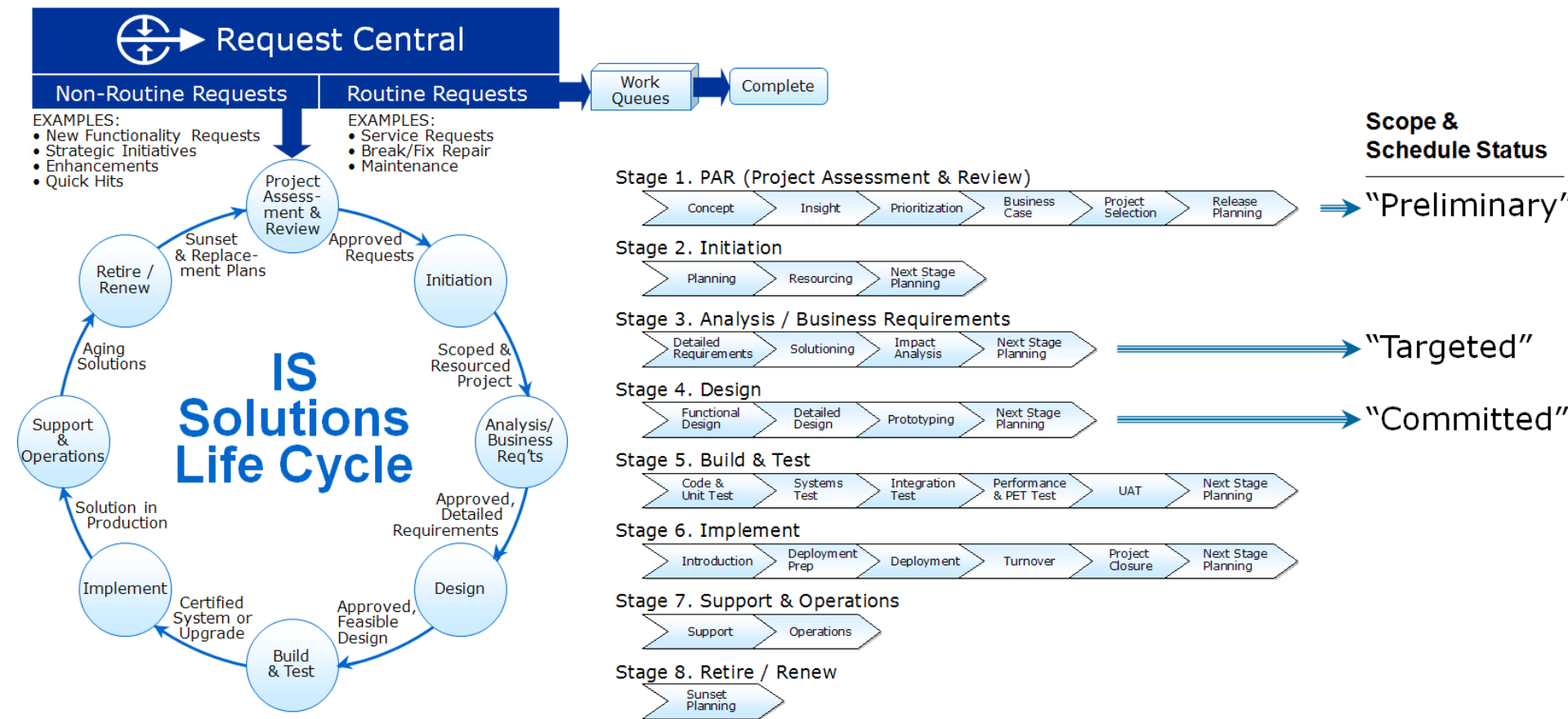
- Defensive
 - Insure against risks
 - Protect what we don't want to lose
- Offense
 - Advance the program



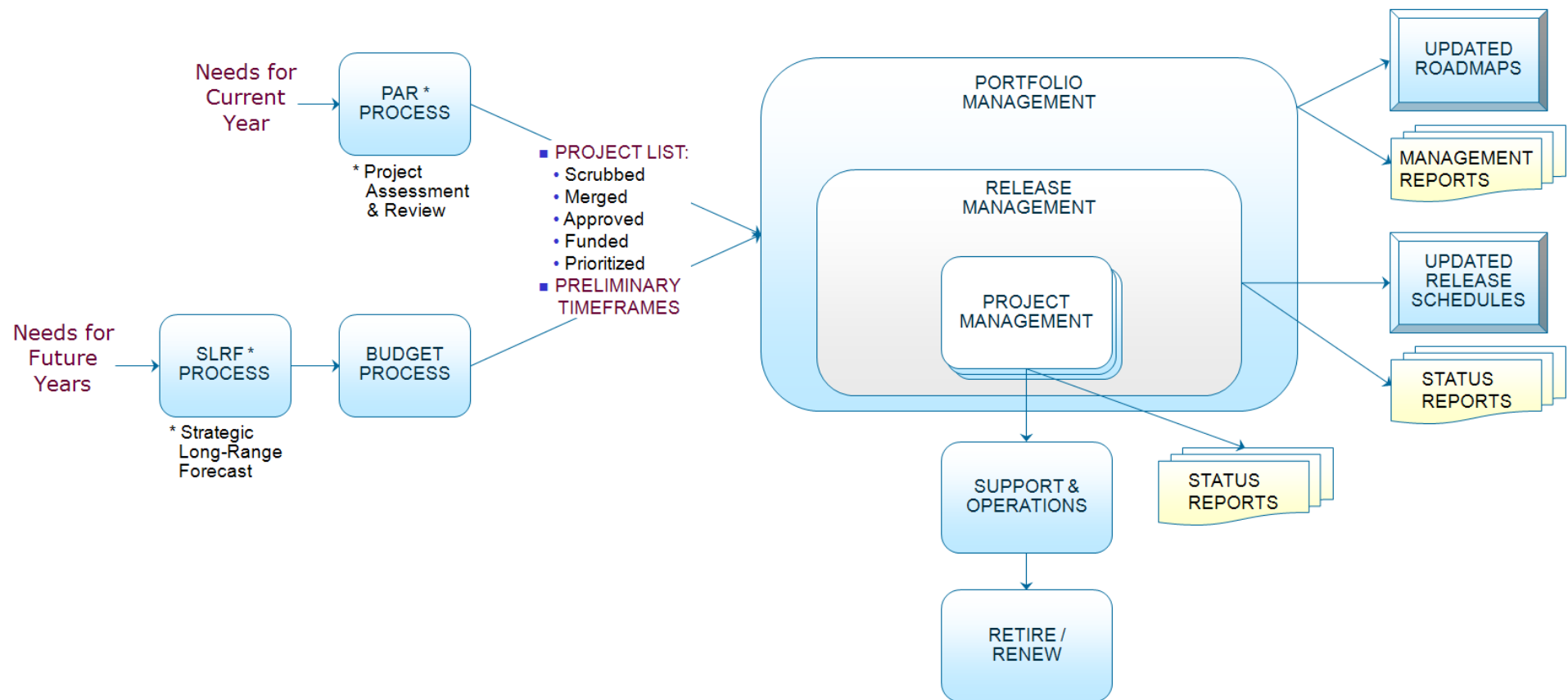
Budgeting

The word "Budgeting" is rendered in a bold, dark gray, sans-serif font. It is positioned on a circular, reflective platform that resembles a polished metal or glass disc. The platform has a slight rim and a smooth, glossy surface that reflects the word above it. The entire scene is set against a light blue gradient background that transitions from a pale blue at the top to a slightly darker blue at the bottom.

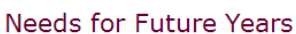
1a. The IS Solutions Life Cycle: Overview Diagram



2a. IT Budget & Portfolio Planning: Overview Diagram

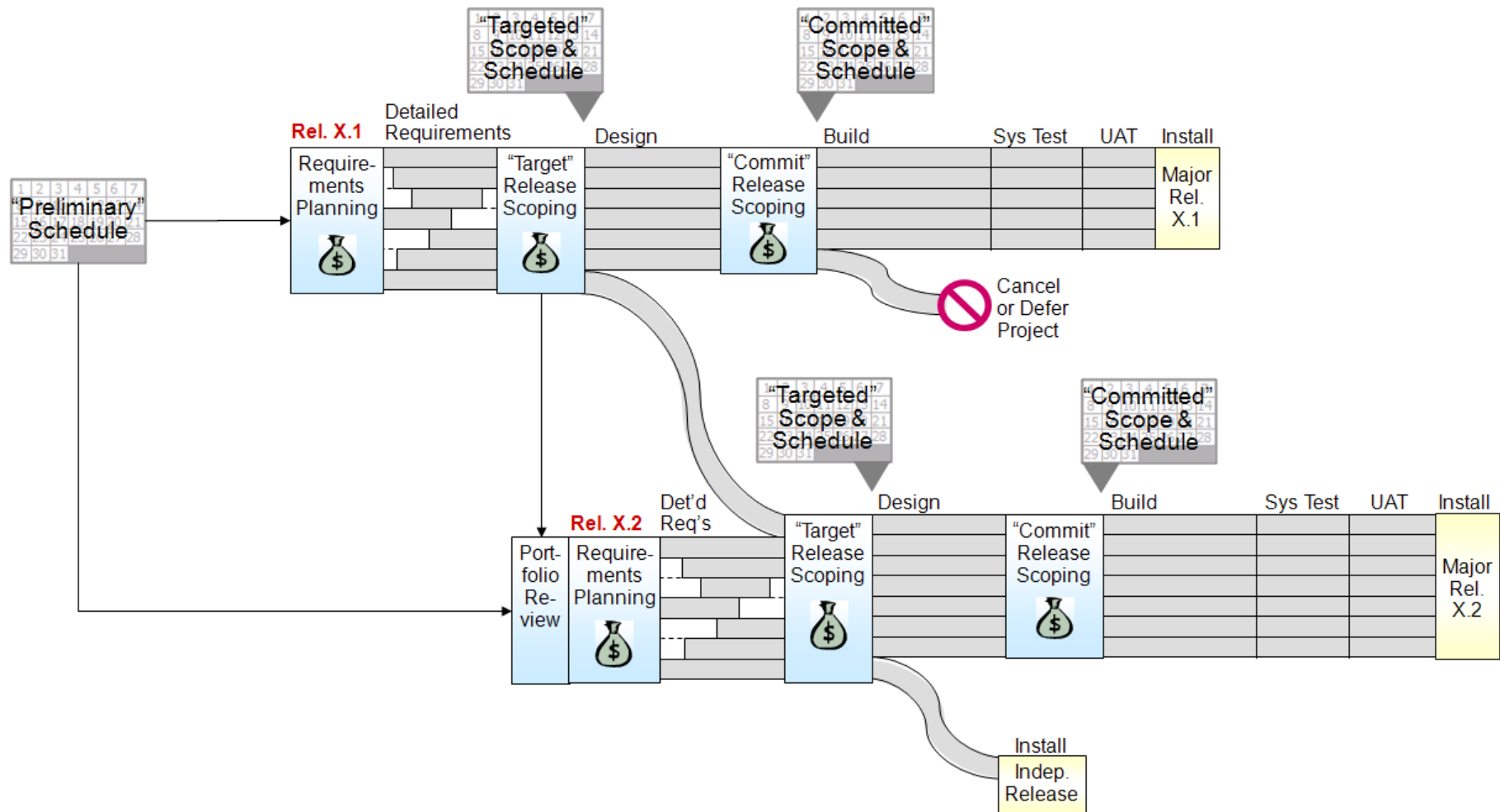


Needs for Current Year

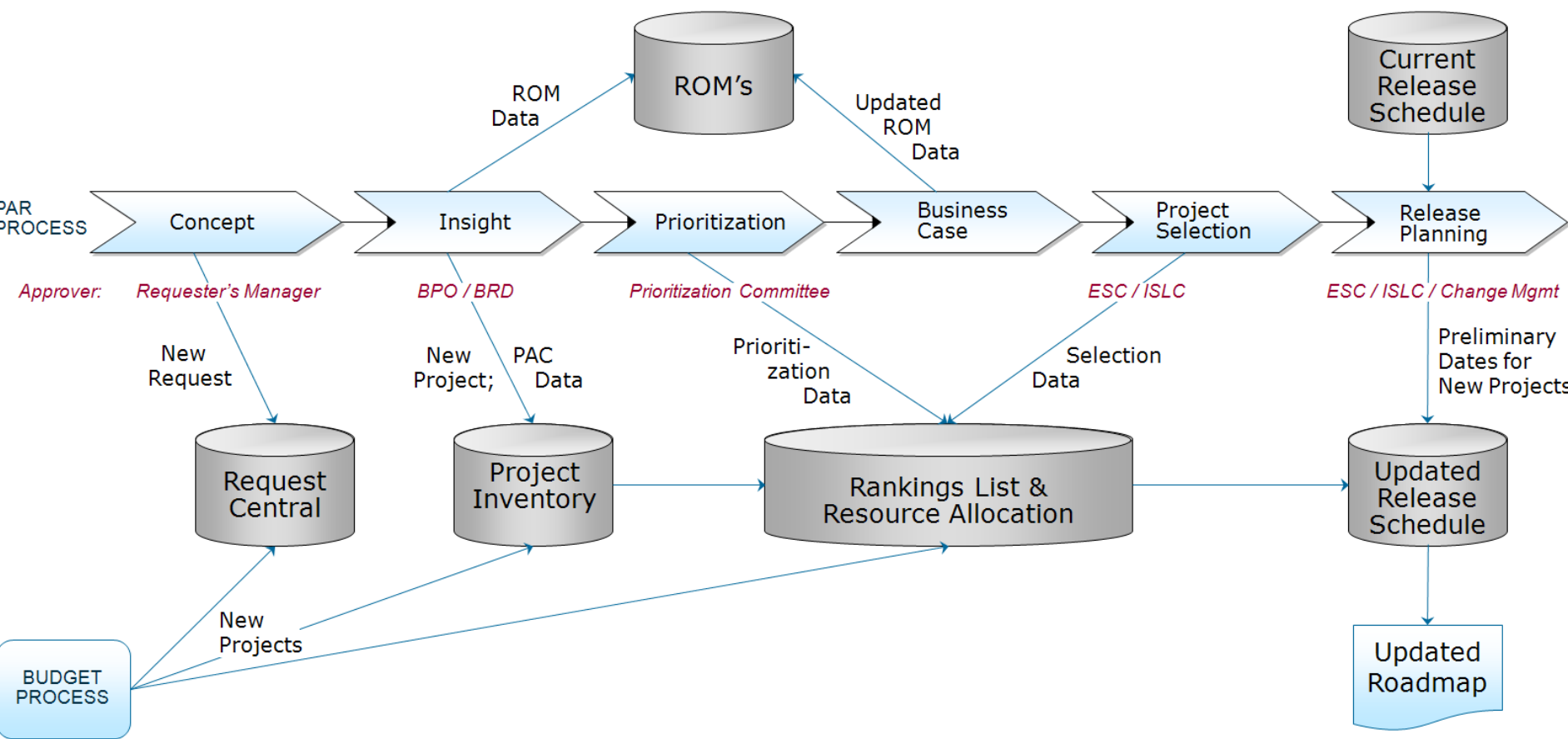


2c. IT Budget & Portfolio Planning: Initiative Fund Concept Diagram

Year									
Month	Month	Month	Month	Month	Month	Month	Month	Month	Month



Project Inventory List: Overview Diagram





Metrics

CIO DASHBOARD

Summary: 8/13/04



Area Summary

- ☒ [Strategy & Planning](#)
- ☐ [BRD](#)
- ☒ [PMO](#)
- ☒ [Service Delivery & Operations](#)

Commentary

- Red Alerts: Internet Upgrade, Do Not Call, and Cares Infrastructure Upgrade projects
- Yellow Warnings:
- Green: Budget tracking

New Data this Report

- [PMO Project Statuses](#)
- [Budget Forecast](#)
- [Sev 1 Report for July](#)
- [Updated Executive Status Report \(not yet finalized by Scott Eadon\)](#)
- [Updated Executive Release Report](#)
- [Time Entry Analysis](#)
- [Weekly Flash Report](#)

Suggested Actions

Commitment Summary

- Commitments Met
- Commitments Missed
- Commitments in Jeopardy

CIO DASHBOARD

! STOPLIGHT ASSESSMENT

R	In serious trouble or risk
Y	Needs close attention
G	Tracking as expected

TREND SINCE LAST REPORT

	Trend is better than last reported
	Trend is worse than last reported
—	No change

FREQUENCY

[w]	Weekly
[m]	Monthly

Strategy & Planning

G Financials: Actuals 2004 YTD & Forecast [m:July]

Item	Metric	Trend	!	Item	Metric	Trend	!
2004 YTD Budget	\$59.5	—	—	2004 Budget	\$117.4	—	—
YTD Expenses	\$55.3	—	G	Forecasted Spend	\$112.5	—	G
Variance (\$M)	\$4.2	—	G	Variance (\$M)	\$4.8	—	G
Variance (%)	7.1%	—	G	Variance (%)	4.1%	—	G

Y Contract Status [m:July]

Item	Metric	Trend	!
Total # contracts working	11	—	Y
# in pre-legal	6	—	G
# in legal review	3	—	G
# pending executive review	2	—	G

G Asset Mgmt Status [m:July]

Item	Metric	Avg/Mo	!
New purchase requests	146	147	—
New goods receipts	153	151	—

Y Consultant Status [m:June]

Project	Metric	Change	!
SEIP	12	-22	—
MMS	19	-2	—
WNP	8	-2	—
CVM	13	-5	—
ICR	1	+5	—
Infrastructure Upgrade	7	-1	—
ISPA	1	-1	—
PM Team	2	—	—
Market Transition	1	—	—
KTLO	10	+8	—
Sarbanes	1	—	—
(Other roll offs)	—	-12	—
TOTAL	75	-32	—

Y Vendor Relations Status [m:July]

Item	Metric	Trend	!
Total # activities	—	—	—
# RFP's active	—	—	—
# research requests	—	—	—
Vendor scorecard	—	—	—

G Headcount Report (detailed report offline) [m:May]

Item	Metric	Trend	!
2004 budgeted headcount	440	—	—
Current headcount	420	—	—
Positions in process	30	—	—
Approved & posted positions	16	—	—
Adjusted headcount	466	—	—
Voluntary turnover this month	—	—	—
Involuntary turnover this month	—	—	—

Y Associate Time Reporting [per:July 16-31]

Item	Metric	YTD	!
% of associates reporting time	91%	94%	Y
% of expected hours reported	95%	97%	Y

CIO DASHBOARD

! STOPLIGHT ASSESSMENT

R	In serious trouble or risk
Y	Needs close attention
G	Tracking as expected

TREND SINCE LAST REPORT

	Trend is better than last reported
	Trend is worse than last reported
-	No change

FREQUENCY

[w]	Weekly
[m]	Monthly

PMO Summary

G [IS Project Budget Report \[m:July\]](#)

Y [Portfolio \\$ Summary \(All Projects\) \[m:June\]](#)

Item (2004 YTD)	Metric	Trend	!
Total # projects	47	-	-
# tracking within 10%	39		Y
# over budget > 10%	8		Y
# not applicable	0	-	G
2004 Budget	\$40.0	-	-
Estimated at Completion	\$37.1		G
Variance (\$M)	\$2.9		G
Variance (%)	-7.2%		G

Y [Project Status Reports \(All\) \[w:8/6\]](#)

Item	Metric	Trend	!
Total # projects reporting	20	-	-
Scope (#G,#Y,#R)	16, 3, 1	-	G
Schedule	15, 2, 3		Y
Budget	16, 2, 1	-	G
Resources	17, 2, 1		Y
Risk	15, 4, 1		Y
Total # Green	79		G
Total # Yellow	13		G
Total # Red	7		Y

R [Projects with Red Statuses \[w:8/6\]](#)

Project	G/Y/R *	Trend	!
Cares Infrastructure Upgrade	G R G R R		R
Do Not Call	R R G G G		R
Internet Upgrade	Y R R G Y		R

* Legend: Scope | Schedule | Budget | Resources | Risk

G [Portfolio \\$ Summary \(Strat Initiatives\) \[m:June\]](#)

Item (2004 YTD)	Metric	Trend	!
Total # projects	9	-	-
# tracking within 10%	6		G
# over budget > 10%	3	-	Y
# not applicable	0	-	G
2004 Budget	\$22.2	-	-
Estimated at Completion	\$20.9		G
Variance (\$M)	\$1.3		G
Variance (%)	-5.9%		G

Y [Exec Status Report \(Strat Inits only\) \[w:8/6\]](#)

Project	G/Y/R *	Trend	!
SEIP	(On hold)	-	-
WNP Enhancements	G Y Y G G	-	Y
Content Billing	G G G G G	-	G
MMS	G G G G G	-	G
CVM	Y Y Y Y Y	-	Y
AWS Texas	G G G G G	-	G
PTT	G G G G G	-	G

[Exec Release Overview \[w:8/6\]](#)

Release	G/Y/R *	Trend	!
R 2.8 (10/17/04)	G G G G G	-	G
R 2.8.1 (1/23/05)	G Y G R Y	-	Y
R 2.9 (4/3/05)	Y G G G G	-	G
R 3.0 (7/18/05)		-	-

* Legend: Scope | Schedule | Budget | Resources | Risk

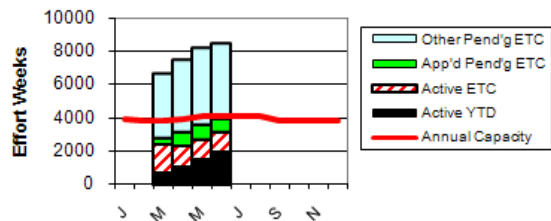
[Project Roadmap \[m:July\]](#)

IT Dashboard, FY 2000



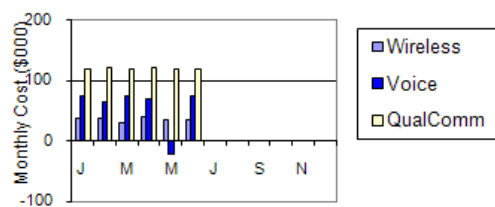
Project Workload

Unsized Projects = 29

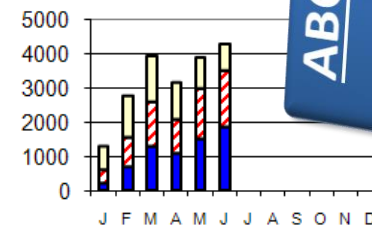


Telecommunications Costs

(NAVL reporting only)

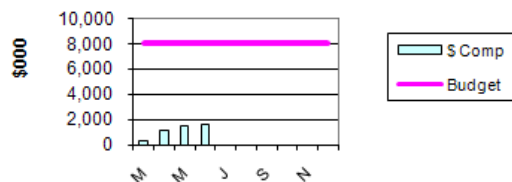


Customer

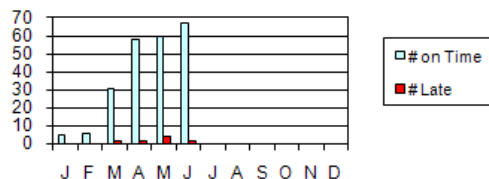


Completed Projects: Budget

March - December only

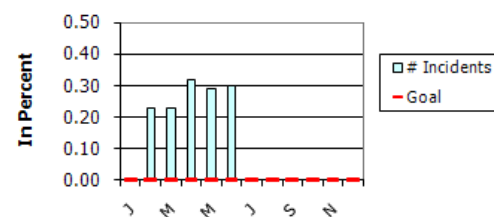


Completed Projects: Timeliness



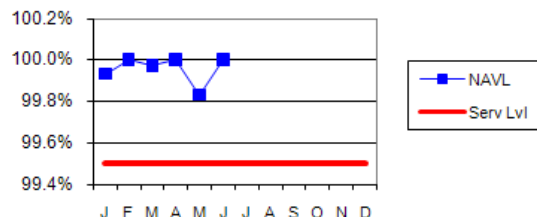
Batch Job Failure Rate (Ft W)

(Goal not yet defined; Online metrics not ready yet)

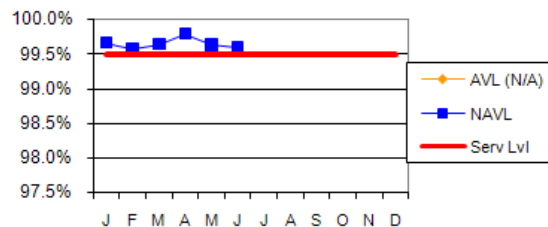


Scheduled Availability: Mainframe

Averaged across production regions

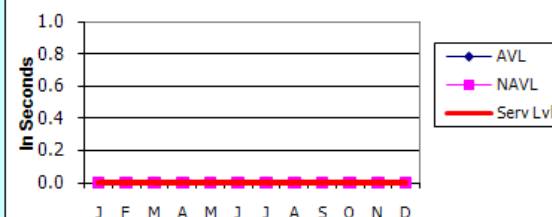


Scheduled Availability: All Servers

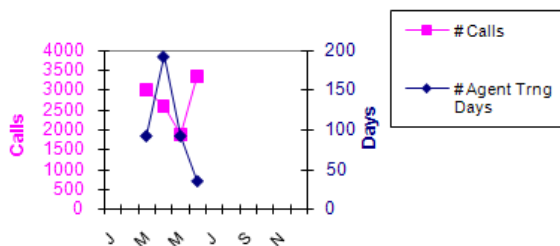


Systems Response Times

(Data to be collected beginning in July)

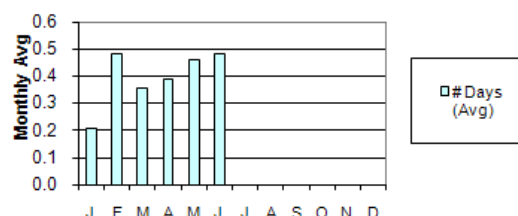


Support to Agent on Applications

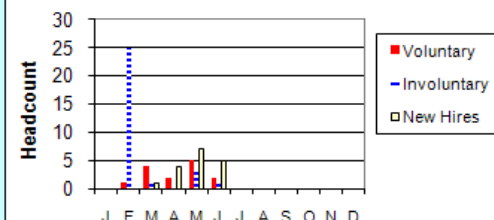


IS Staff Training Days

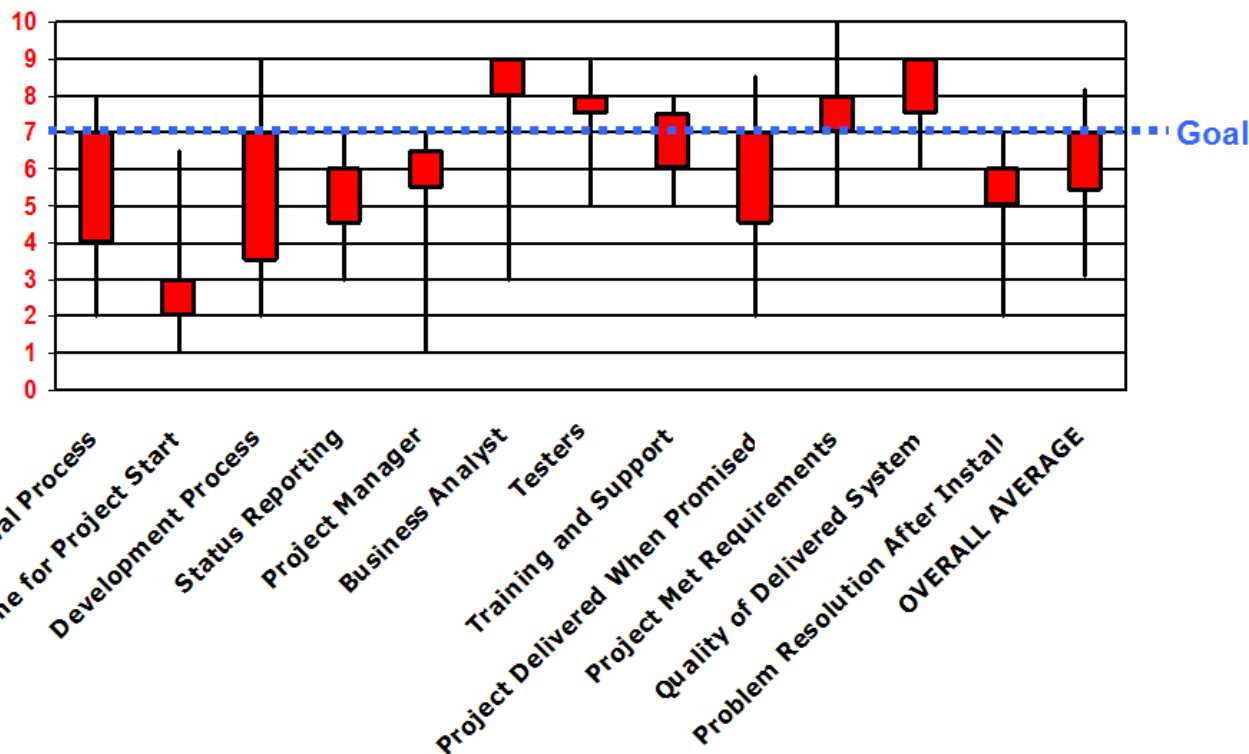
Annualized per person = 4.9



Staff Turnover



Quality of Service Audit: User Satisfaction with IT Service



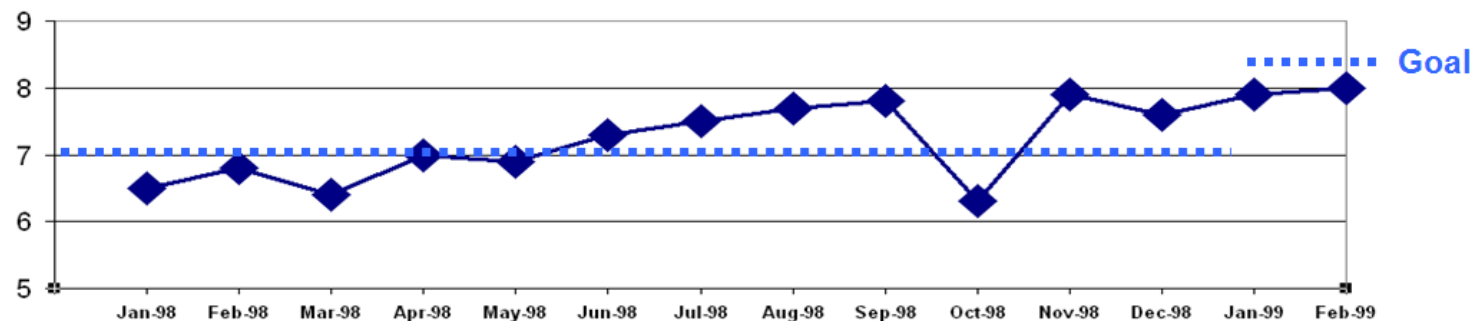
Highest Rating

Middle 80% of Ratings

Lowest Rating

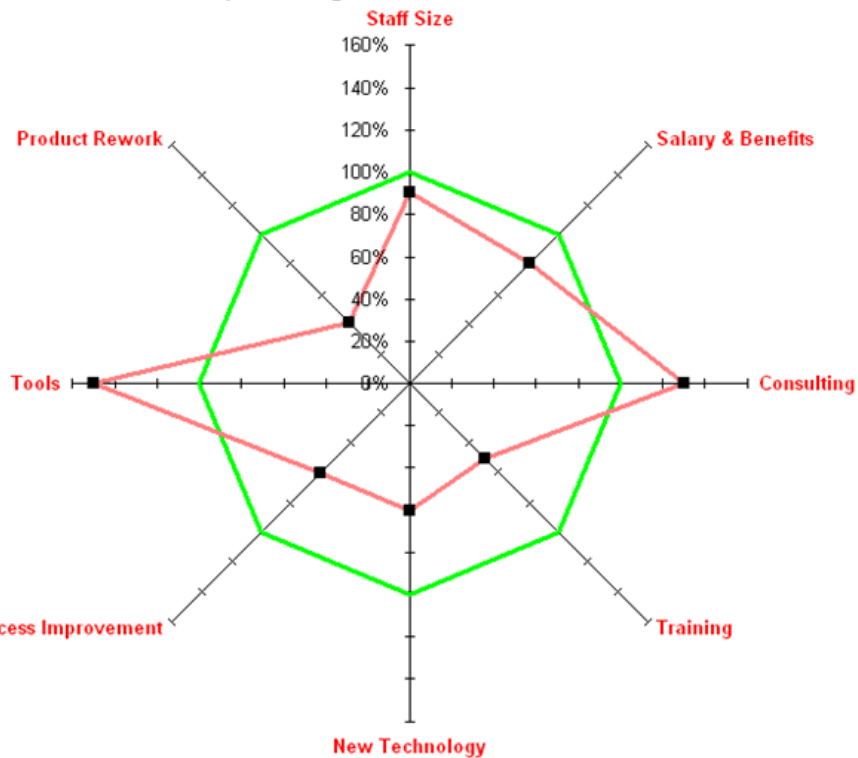
See Appendix for the origin of these categories.

Overall Average Trend line



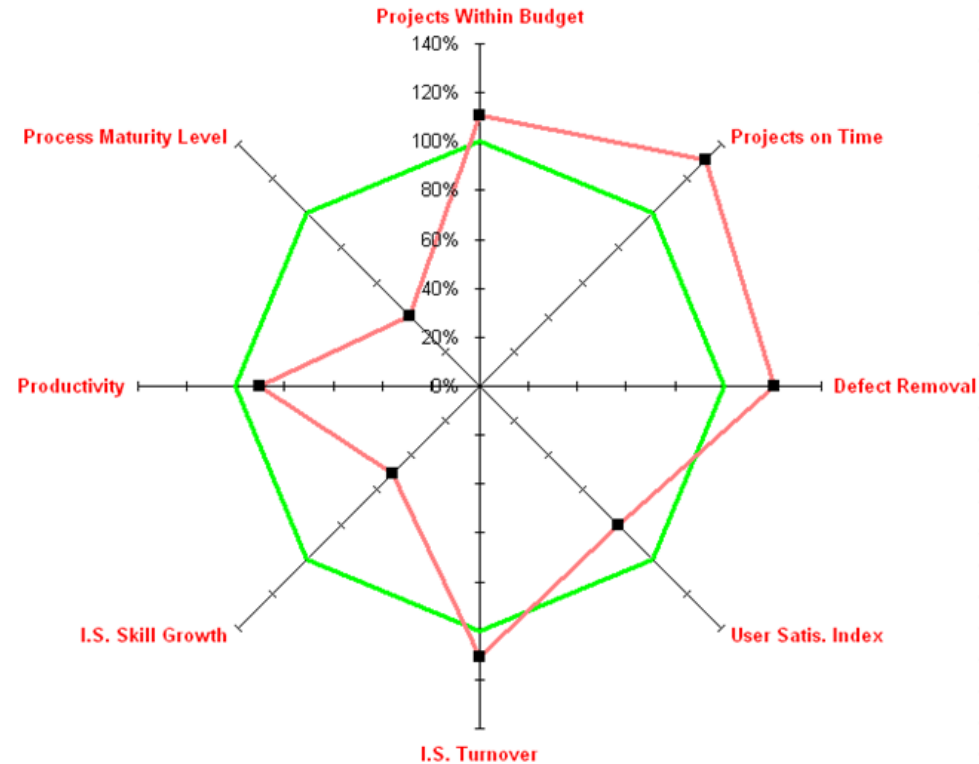
RELATIVE I.S. SPENDING

Less Spending is Toward the Center



RELATIVE I.S. RESULTS

Worse Results are Toward the Center



This Period Compared to Last Period

	Score	Change from Last Period		Score	Change from Last Period
Staff Size	90%		Projects Within Budget	110%	
Salary & Benefits	80%		Projects on Time	130%	
Consulting	130%	up 20%	Defects	120%	down 10%
Training	50%		User Satisfaction Index	80%	
New Technology	60%	up 30%	I.S. Turnover	110%	up 10%
Process Improvement	60%		I.S. Skill Growth	50%	
Tools	150%	down 10%	Productivity	90%	
Product Rework	40%		Process Maturity Level	40%	

IS Metrics Program

- (at start) **Alignment** Ensuring IT & business goals match.
- (at end) **Measuring IT Value** Ensuring business unit & IT goals match.
Certifying results of alignment; Adjusting as needed.

Without metrics, alignment efforts are merely good intentions.



Departmental Effectiveness Metrics

Develop an ability to measure I/S critical success factors, how we're doing, where we can improve, & where we need better balance or alignment

Customer Metrics

Measure satisfaction levels for all customer types

Quality Metrics

Measure I/S product quality

Personnel Metrics

Measure staff performance, skill growth & cultural factors

Innovation Metrics

Measure innovation levels

Portfolio Optimization

Maximize the order of critical projects

Service Metrics

Monitor SLA's

Productivity Metrics

Measure existing processes

Automation of SDLC

Automate the critical parts of the Systems Development Life Cycle

Management Metrics

Measure how well we manage resources

Strategic Planning

Determine the most critical projects

Define SLA's

Agree upon SL's

Software Metrics

Determine & collect appropriate measurements

Definition of SDLC

Define how we want to do SD

R & D

Build I/S's research capability

Management Standards

Define how we want to manage resources

Departmental Vision

Define I/S's role in the organization, its core values, & its operating principles (such as control & support of user computing; level of outsourcing; when to buy versus build; skill management & retooling; performance measurement; commitment to QA/metrics/documentation, etc.)

Reporting

A 3D rendering of the word "Reporting" in a bold, sans-serif font. The text is dark gray and is positioned on a circular, reflective platform that resembles a CD or a polished metal disc. The platform has a slight rim and a smooth, glossy surface that reflects the text above it. The background is a light blue gradient, and the overall lighting is soft, creating a professional and modern aesthetic.

Projects: In Quick Quote, Initiation or Active Phase



Project Name	Description	Themes: Cust Impact, etc.	Priorities			Workstream	Key Players		Dates		Status		Timeline							
			Cust Sat	Grow/Rev	Stds of Exe		Drive DO	Sponsor; Owner	IS PM; Biz PM / Contact	Start T: Target A: Actual	Implem. T: Target A: Actual	◆: Red ▲: Yellow ●: Green	Trend	Comment	Timeline					
															2009			2010		
Quick Quote																				
Bulk MDN Resend	Create a new Bulk Update utility to resynch the switches with data from CARES.	-	●		●	Enterprise Small	George Pitsoulakis; Lawrence Grumboski	TBD				●	—	Created QQ as SMALL effort. Will need to be prioritized by the SPOC.						
In Initiation																				
Active																				
MEID to NDC	Modify CDR for Nortel switches to include the MEID value	Cust Impact	●		●	Compliance	Narothum Saxena	Anthony Howard; Mankesh Ahluwalia	T: 08/03/2009 A: 08/03/2009	T: 11/12/09 A: TBD		●	—	First Draft of Design completed; Build is underway.						
Femto Cell Trial	Femto helps improve the in-building coverage. It is one of the proof points for Human Coverage and the focus in on residential play.				●	Enterprise Strategic						●	—							
LTE Technical Trial	4G Technical Trial				●	Enterprise Strategic						●	—	Submitted RFP to vendors; Will begin meeting with vendors in September						
Schaumburg NOC Move	Moving of Schaumburg NOC personnel to a new facility.				●	Enterprise Strategic	Lenard Boggs		T: TBD	T: 01/31/2010		●	—	Waiting for approval to sign the lease before we procure contractors.						

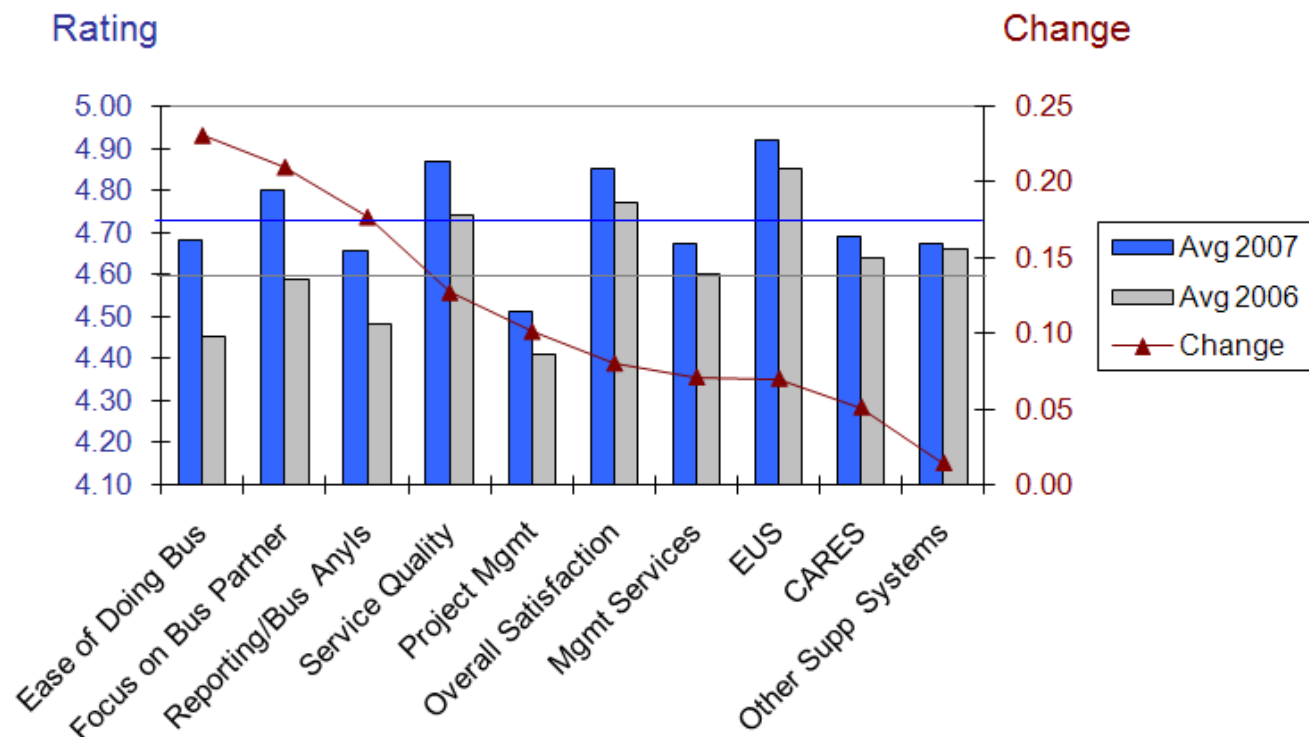
Business-as-Usual (BAU) Initiatives



Name	Description	Requester	Owner	Priority	Dates			Status	
					Requested	Target	Complete	◆: Red ▲: Yellow ●: Green	Comment
Microsoft Project Server		John Carson	Jeff Mander					●	
Capacity Planning Project			Sheri Casas					●	
AnyPath VM	Migration from the Movius Glenayre platforms to the ALU AnyPath		Jason Franz			Mid Sept		●	Friendly Associate migration completed July 14th.
Nortel MTX16 Upgrade	Upgrade of Nortel switches to MTX16		Scott Dougald					●	In progress
Lucent Switch ECP 31.0 Retrofits	Providing support for ECP retrofits		Scott Dougald					●	In progress
SMSC Record Sequence	To ensure all records are collected, add Record Sequence Number Field to the SMS Billing Record.		Scott Dougald					●	On hold waiting for feedback from Motorola.
Call Forward Default	Modification of provisioning for VM		Scott Dougald			Mid Sept		●	Performed in conjunction with AnyPath migration
Least Cost Routing	Modification of provisioning to Nortel switches for post paid subscribers to determine LCR		Kirk Conley		6/26/09	7/27/09		●	Code completed. Awaiting production deployment.
Clinton SMU VM Migration	Support for move of Clinton VM off of the Knoxville SMU.		Scott Dougald					●	Testing Support
BCGI Cleanup	Alter provisioning for the Lombard 3 prepaid subscribers to help balance the subscriber count through the two SCPs.		Scott Dougald					●	
MMS Platform Upgrade	Providing Testing support for the Hardware, OS, and Software changes		Kirk Conley					●	Test support for MPS, Mediation, and NDC
ALU SMS Upgrade 10.1	Provide support for the ALU SMS Upgrade.	Julie Wick	Steve Puroell			8/6/09	8/6/09	●	Completed in Production
SMS Market Migrations	ALU SMS Migrations for M03 & M04	Julie Wick	Steve Puroell			10/14/09		●	
Nortel EIU Replacement	Nortel is changing how to provision the switches going from EIU cards to a Unix system interface.		Steve Puroell					●	
Cell Trunk Traffic Report	CARES report for Cell Trunk originations	Lisa Paarfusser, John McCluskey	Scott Robinson			TBD		●	Design is in progress.
Mobile Terminated Calls Report	CARES report for mobile terminations.	Carey Wing	David Smith		6/10/09	TBD		●	Design is in progress.
USCC Geo-Redundant Mbx Provisioner	Replacement of the existing mailbox provisioner with updated SUN T2000 hardware and adding another T2000 server in Knoxville.	Bala Muthu	Scott Dougald		6/22/09	TBD		●	On hold due to AnyPath migration
Oregon Overlay	The NPA of 541 will add 458 as an overlay in January 2010.	Kyle Scarbrough	Scott Dougald		8/26/09			●	

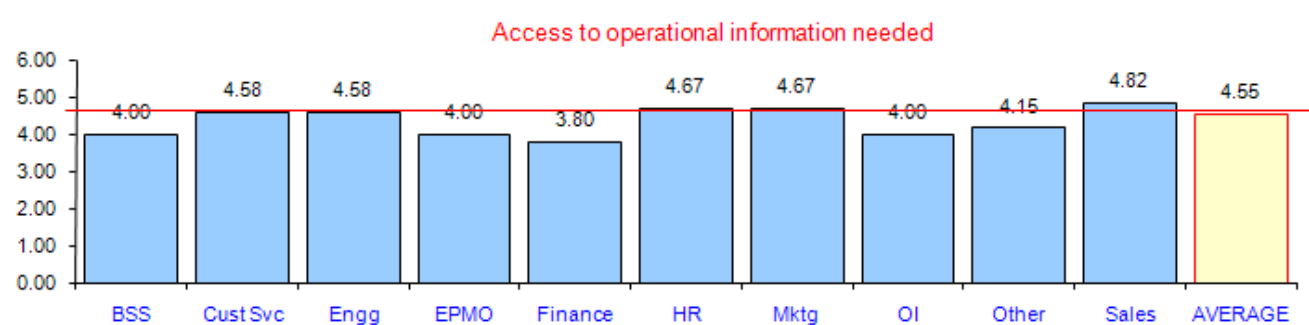
Area Summary

Area	Avg 2007	Avg 2006	Change
Ease of Doing Bus	4.68	4.45	0.23
Focus on Bus Partner	4.80	4.59	0.21
Reporting/Bus Anyls	4.66	4.48	0.18
Service Quality	4.87	4.74	0.13
Project Mgmt	4.51	4.41	0.10
Overall Satisfaction	4.85	4.77	0.08
Mgmt Services	4.67	4.60	0.07
EUS	4.92	4.85	0.07
CARES	4.69	4.64	0.05
Other Supp Systems	4.67	4.66	0.01
Overall Average	4.729	4.62	0.109



IS Mid-Term Survey

Responses by Division

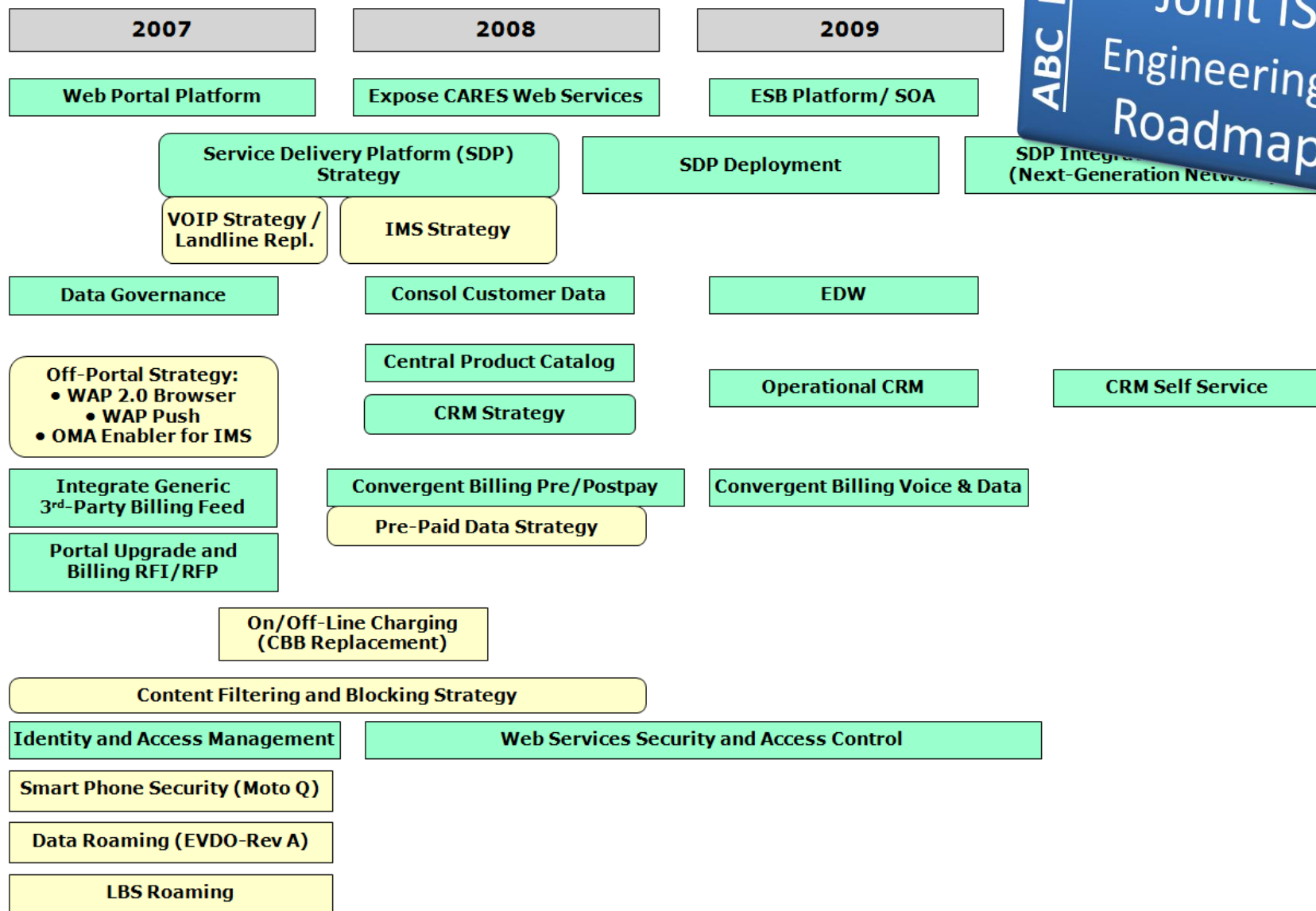
☒ Auto Update Chart


Item	BSS	Cust Svc	Engg	EPMO	Finance	HR	Mktg	OI	Other	Sales	AVERAGE
CARES - Point of Sales (POS)	4.33	4.63	5.17	4.00	4.33	4.50	3.67	4.50	4.74	4.74	4.68
CARES - Customer Service Module (CSM)	3.67	4.75	5.17	4.50	4.70	4.20	5.00	6.00	4.92	4.89	4.83
CARES - Billing and Rating	4.25	4.30	5.00	4.50	4.40	4.20	4.00	3.50	4.48	4.30	4.34
CARES - Collections	3.00	4.68	5.50	4.00	5.17	5.00	5.00	4.33	4.46	4.80	4.68
CARES - Number Management	4.00	4.59	4.40	4.00	5.00	4.00	5.00	4.33	4.68	4.85	4.69
CARES - Price Plan Management	3.67	4.52	4.50	4.00	4.75	4.40	3.50	4.00	4.57	4.81	4.60
CARES - Dealer Compensation	3.00	4.86	5.00	4.00	4.14	4.00	5.00	4.00	4.47	4.60	4.52
CARES - Wireless Number Portability (WNP)	3.00	4.87	5.00	4.00	4.86	5.00	3.00	5.50	4.84	4.95	4.87
Support provided for CARES	3.78	5.13	5.20	4.67	4.27	4.00	5.50	4.50	4.91	5.10	4.95
AFFINIUM	3.00	4.90		4.00	4.33	5.00	4.00		4.60	4.56	4.57
AIM	3.33	4.08	5.00	4.00	4.25	4.67	4.33	3.67	4.22	4.38	4.22
BRAVA	3.00	5.00		4.00	4.50	5.00		2.00	4.50	4.60	4.49
CVM/CDMD (Campaign Management/Data Management)	3.00	4.60		4.00	4.33	5.00	3.50	3.50	4.64	4.81	4.59
Documentum	2.86	4.90	4.10	4.00	4.70	5.00	2.00	3.67	4.47	4.77	4.47
EERIS (Easvedae Reporting)	3.00	4.63	4.25	4.00	5.00	5.00	4.00	4.33	4.74	4.85	4.73
Infranet	4.00	4.82	4.67	4.00	5.00	5.00		3.67	4.89	4.91	4.81
IVR (Interactive Voice Response)	3.75	4.67	4.82	4.50	4.75	4.75	5.00	3.67	4.72	4.75	4.69
MARS	2.83	4.50	4.00	4.00	3.78	5.00	3.40	2.50	4.33	4.67	4.25
OLR	4.25	4.59	4.63	4.50	4.43	5.11	4.00	4.40	4.76	5.10	4.79
Remedy	3.86	4.65	4.38	4.00	4.59	4.60	4.00	4.25	4.58	4.88	4.64
Sales Datamart	3.00	4.88	5.00	4.00	4.33	5.00	4.50	1.00	4.75	4.84	4.70
BCV/RCV	3.25	5.00		4.00	3.60	5.00	4.00	2.00	4.83	4.95	4.53
Support provided for the support services listed above	3.33	4.89	4.44	4.67	4.36	5.33	4.33	4.75	4.69	5.00	4.79
Format of the data reports	3.60	4.70	4.71	4.00	4.33	4.67	4.33	5.50	4.80	4.76	4.69
Comprehensiveness of data reports	3.86	4.83	4.71	4.00	4.50	4.67	4.67	4.50	4.71	4.80	4.72
Timeliness of data reports	4.00	4.91	4.64	4.00	4.67	4.33	4.33	4.50	4.58	4.52	4.58
Usefulness of data reports	3.57	4.84	4.67	4.00	4.78	4.67	4.75	5.50	4.67	4.92	4.79
Level of detail of the data reports	4.14	4.77	4.75	4.00	4.44	4.67	4.75	5.50	4.54	4.88	4.75
Answers to business questions provided in data reports	4.00	4.85	4.73	4.00	4.29	4.67	4.67	4.00	4.43	4.80	4.68
Timeliness of the information needed	4.29	4.75	4.73	4.00	4.33	4.33	4.33	4.33	4.30	4.64	4.57
Access to operational information needed	4.00	4.58	4.58	4.00	3.80	4.67	4.67	4.00	4.15	4.82	4.55
Extent to which reporting and business information enables me to i	3.33	4.80	4.63	4.00	3.82	5.00	4.00	4.25	4.39	4.86	4.62
Extent to which reporting and business information helps me make	3.67	4.85	4.57	4.00	3.64	4.67	4.00	4.00	4.61	4.84	4.64
Support provided for reporting and business analysis	3.71	4.67	4.73	4.50	4.00	4.67	4.75	3.50	4.43	4.90	4.64
Vendor and Contract Management collaboration	4.00	4.64	4.82	4.50	4.40	5.00	4.25	2.00	4.07	4.73	4.54
Finance and Accounting support	3.67	4.71	5.00	4.50	4.06	4.75	3.25	5.00	4.61	4.91	4.64

Roadmaps



TECHNOLOGY ROADMAP: HOW DO WE GET THERE



LEGEND

"Strategy" initiatives include these activities (if appropriate)

"Deployment" initiatives include these activities (if appropriate)

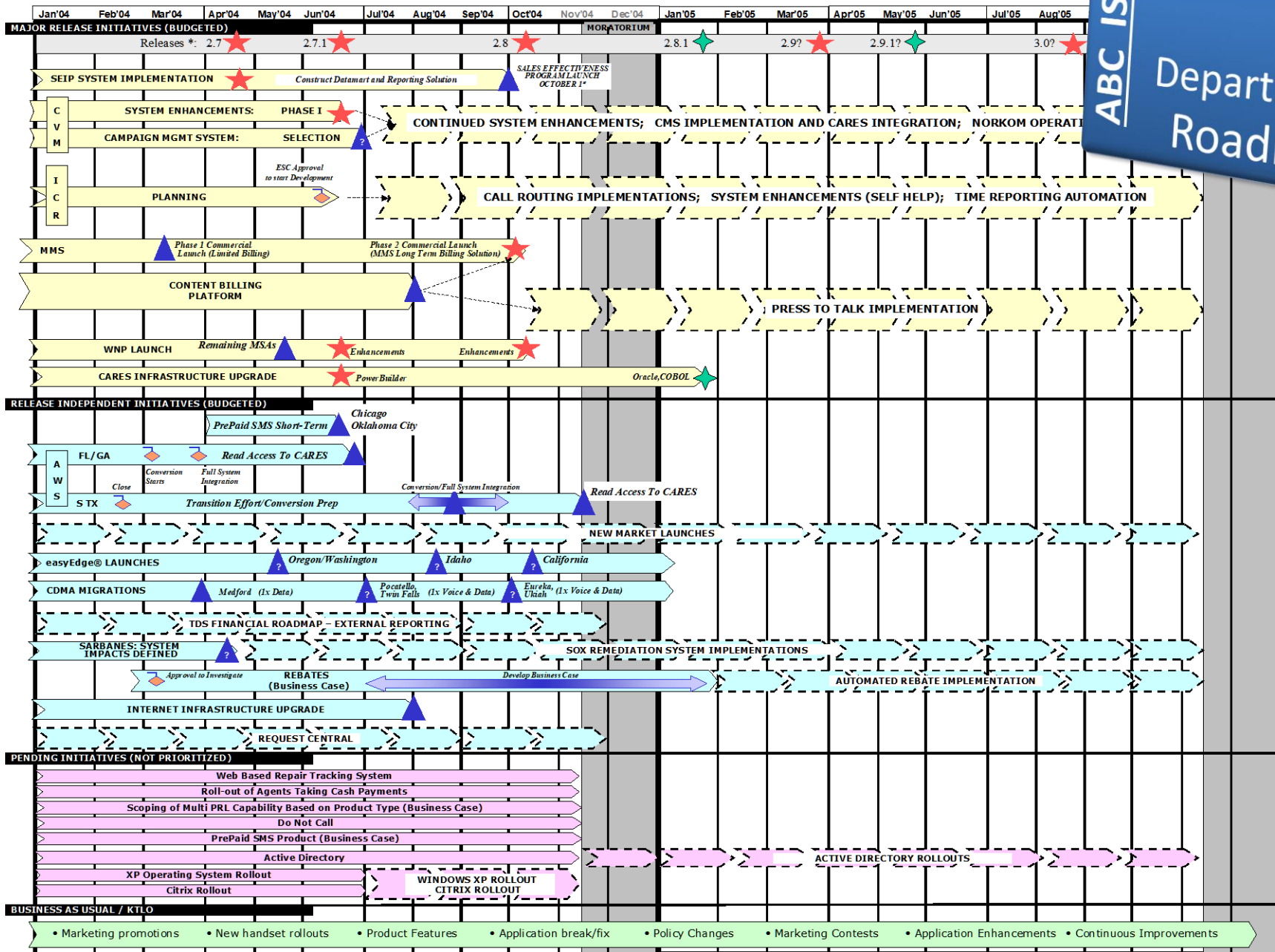
IS Initiative
Engineering Initiative

Planning	Analysis	Feasibility Study	Design	Technical Trial Network → Billing	Reference Models
----------	----------	-------------------	--------	--------------------------------------	------------------

Strategy initiatives are shown in rounded rectangles

Planning	Design	Development	Testing / Market Trial	Rollout	Warranty
----------	--------	-------------	---------------------------	---------	----------

2004 Strategic Initiative Roadmap (as of 4/6/04)



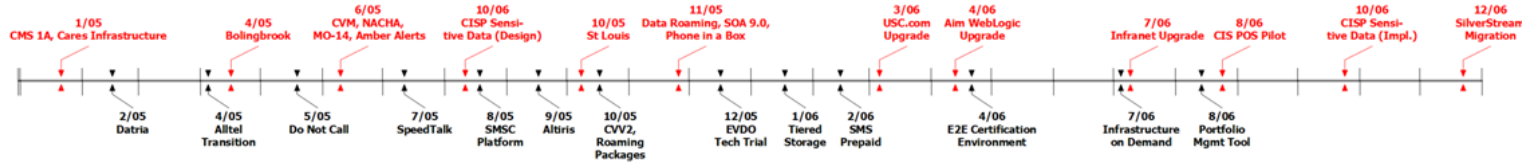
LEGEND: ★ FEATURE RELEASE ◆ MINOR RELEASE → GO/NO-GO OR OTHER CHECKPOINT ▲ RELEASE-INDEPENDENT IMPLEMENTATION ? = Date is not certain

* Releases consist of changes to CARES, AIM and the Infranet

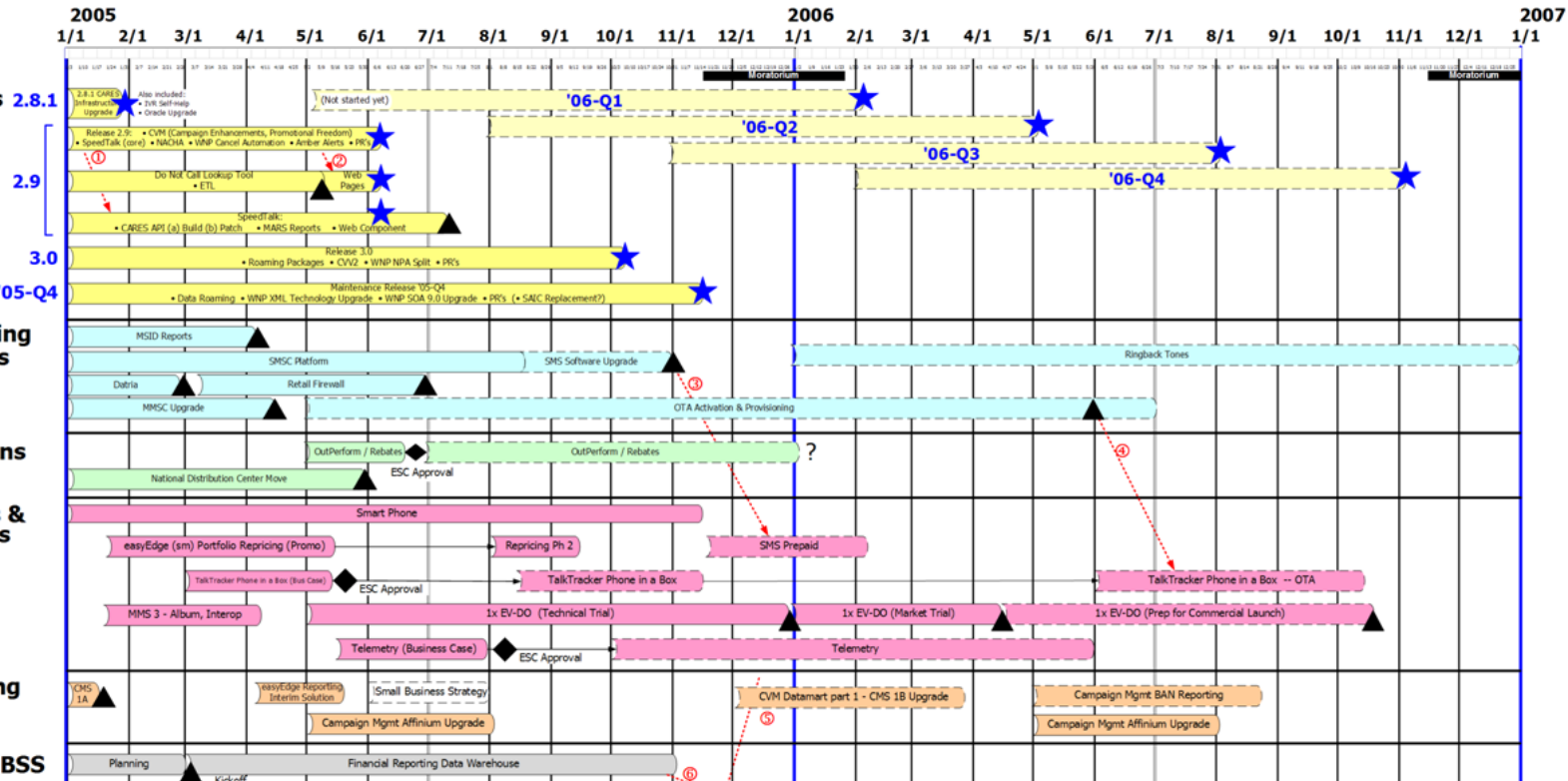
Project Roadmap: 2005-2006

May 2005, v1.0

Key Dates



Major Releases



Engineering Projects

Operations

Products & Services

Marketing

Finance & BSS

Key Dependencies

- Completion of the SpeedTalk project is dependent on the SpeedTalk (core) component of Release 2.9.
Note: Some components of SpeedTalk will be delivered in R2.9; others will come a month later.
- Customer phone numbers for the Do Not Call Web Tool project are dependent on CVM 2.9.
- The new "SMSC Platform" is needed before the "SMS Software Upgrade." Also, development must wait for vendor updates (Motorola and VeriSign).
- OTA will enable full functionality of Phone in a Box.
- Only 1 of these initiatives would be needed (either the

Value



2006	2007	2008	2009	
Architecture Future Vision	Security Oversight Board	Arch Change Control Board	Reusable Components Lib.	R&D Function Defined
Project Portfolio	SID Model	NGOSS, SANRR Embraced	eTom Adopted	Metrics Program Established
Data Governance Board	Roles & Repons. Definitions	Baselines Defined	Best Practices Library Built	Deadons+I Implemented
Ongoing Arch. Consultation	Org Structures Defined	Benchmarks Established	Needs Analysis Formalized	Ref Architectures Refreshed
Business Process Models	Tool Bench Defined	QA Standards Defined	Opportunity Analysis Defined	Metrics Program Begun
Communications/Roadshow	Documentation Standards	Arch Design Standards Set	Training Formalized	Cont Improvement Program
Technical Glossary	Training Program Initiated	Processes Documented		Training Refreshed
Web Frontend to Documents		Training Program Enhanced		
Document Change Control				

Capabilities

- | | | | | |
|--|--|--|---|--|
| <ul style="list-style-type: none"> ▪ Establish EA direction ▪ Coordinate projects ▪ Protect data better ▪ Document systems ▪ Improve access to data | <ul style="list-style-type: none"> ▪ Manage security better ▪ Use standard data models ▪ Reorg as needed ▪ Enhance productivity & quality with tools & standards ▪ Train associates | <ul style="list-style-type: none"> ▪ Manage the architectures better ▪ Follow a standard Architecture framework ▪ Define measures of success ▪ Document repeatable processes | <ul style="list-style-type: none"> ▪ Reuse components for quality & efficiency ▪ Follow a standard Architecture model ▪ Improve ability to plan for future needs | <ul style="list-style-type: none"> ▪ Improve R&D capabilities ▪ Improve fact-based decisions ▪ Document Architectures in a standard model ▪ Keep documents current ▪ Reward successes |
|--|--|--|---|--|

Time

Processes



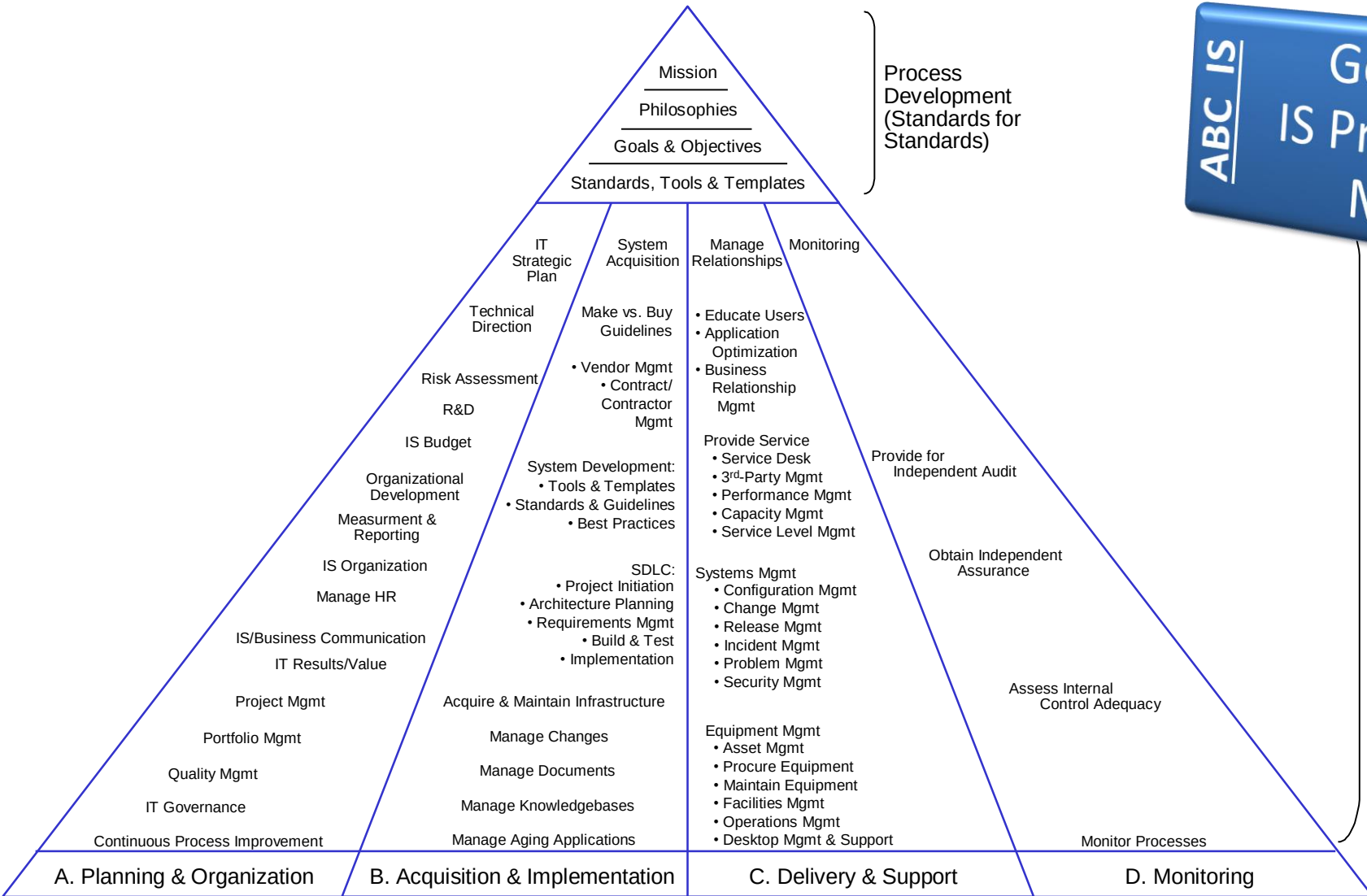
Generic IS Process Model

Process Development
(Standards for Standards)

IT Process Areas

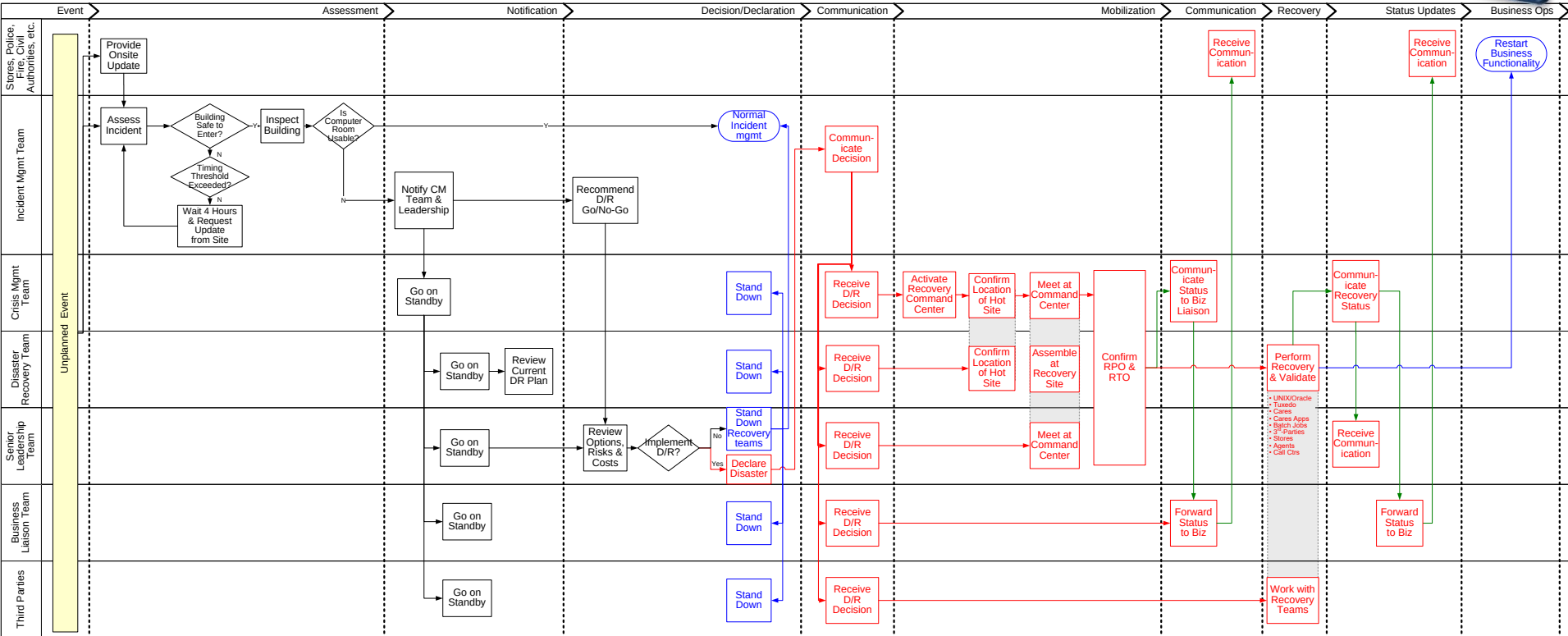
Process Category

Process Support

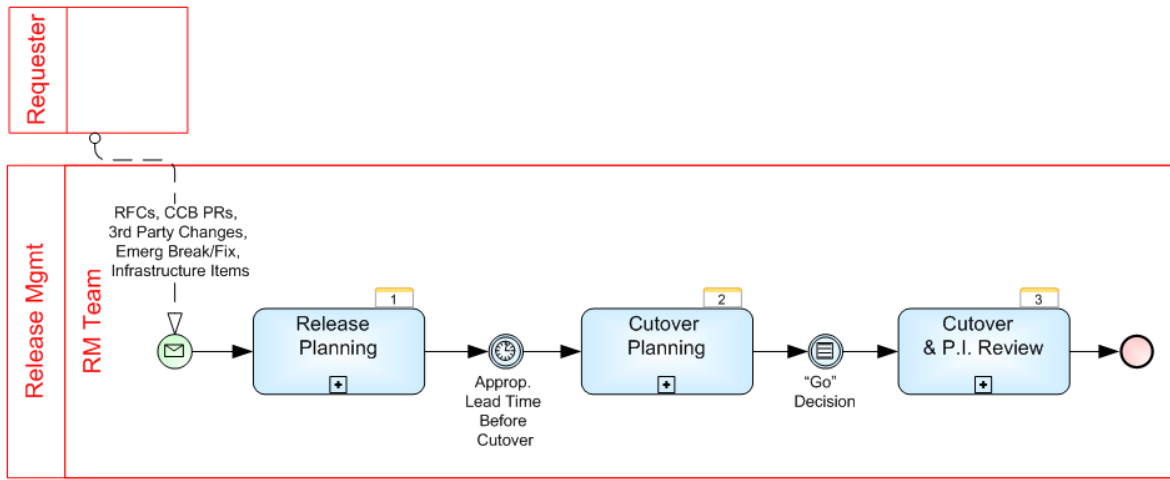


ABC IS Disaster Recovery Process

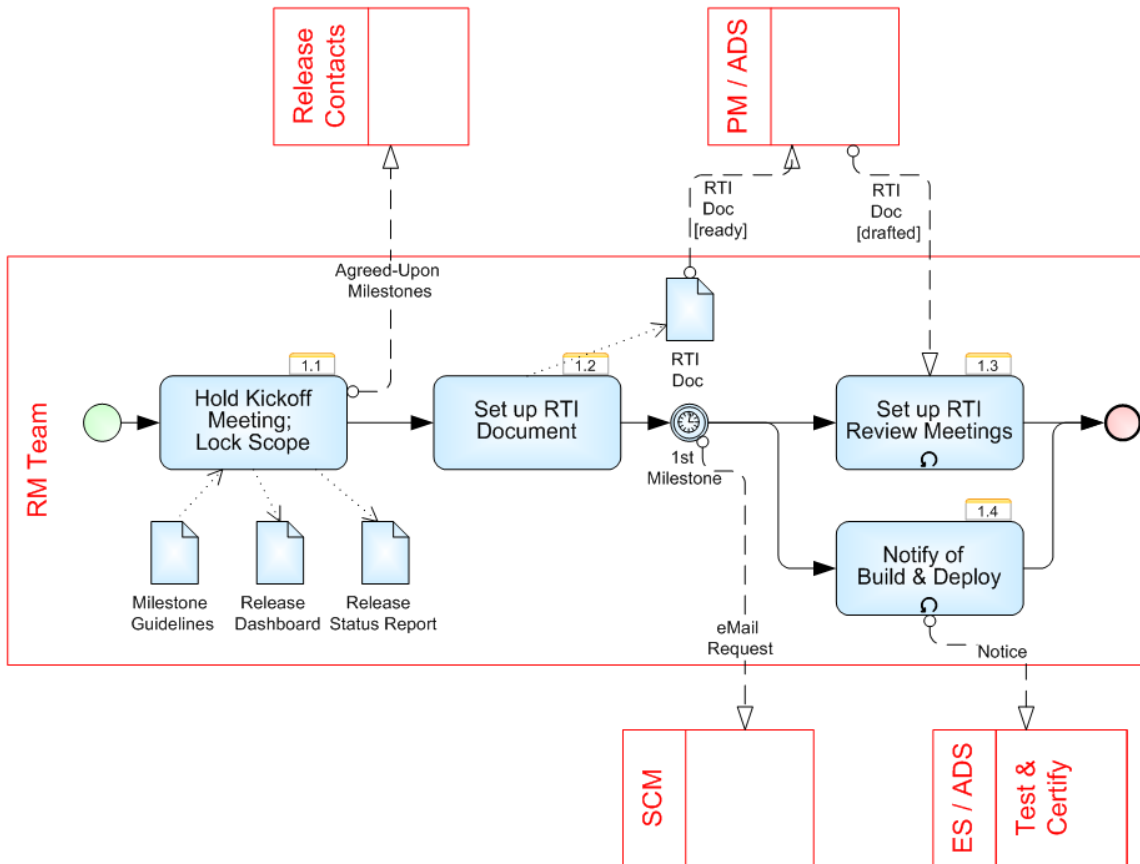
Disaster Recovery Swim Lane



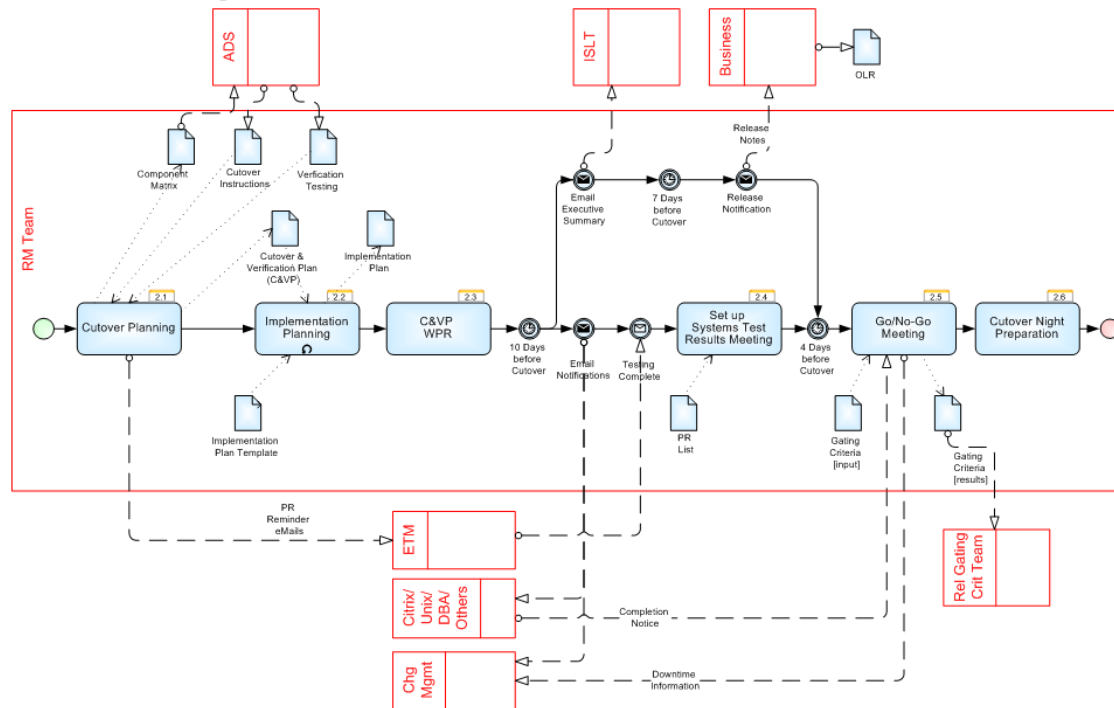
Level 0 Diagram: Release Management (Top level of diagram)



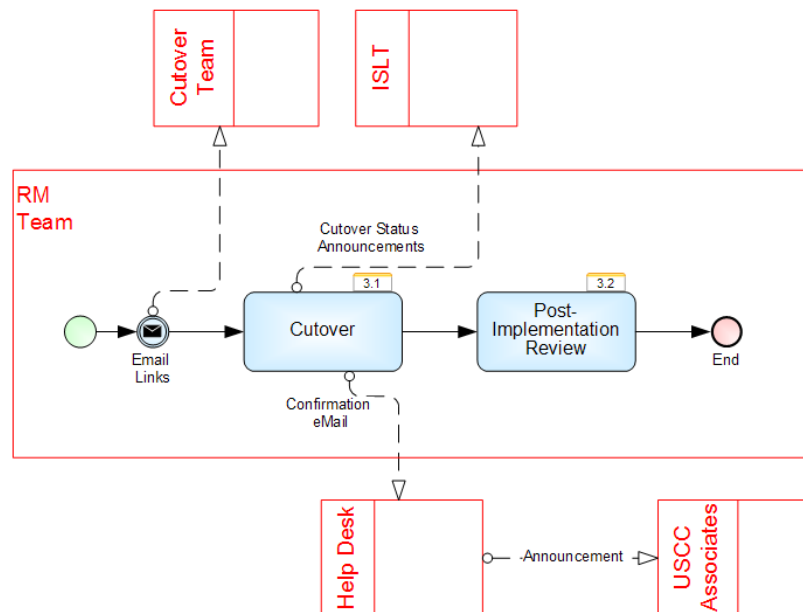
1: Release Planning



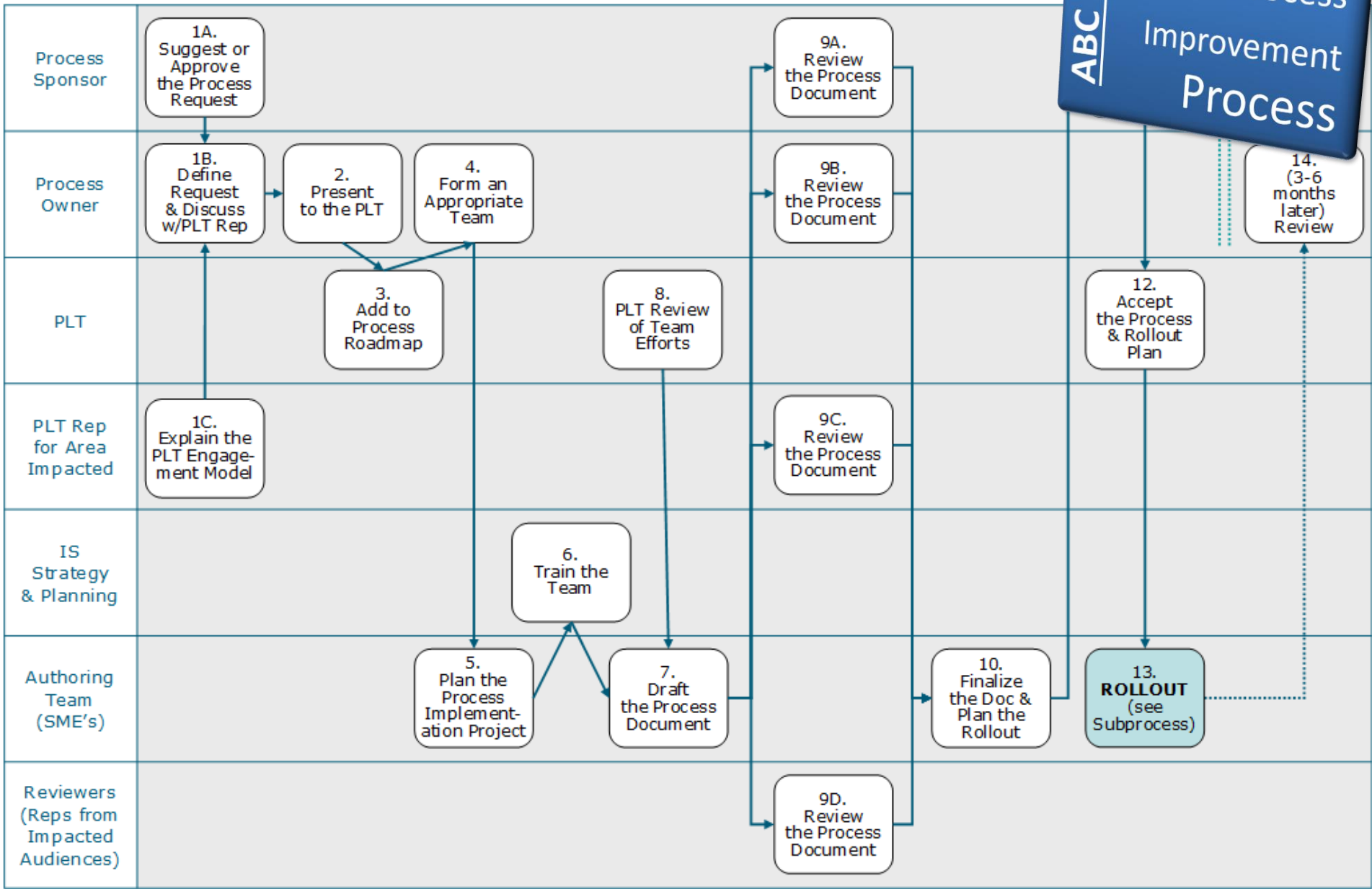
2: Cutover Planning



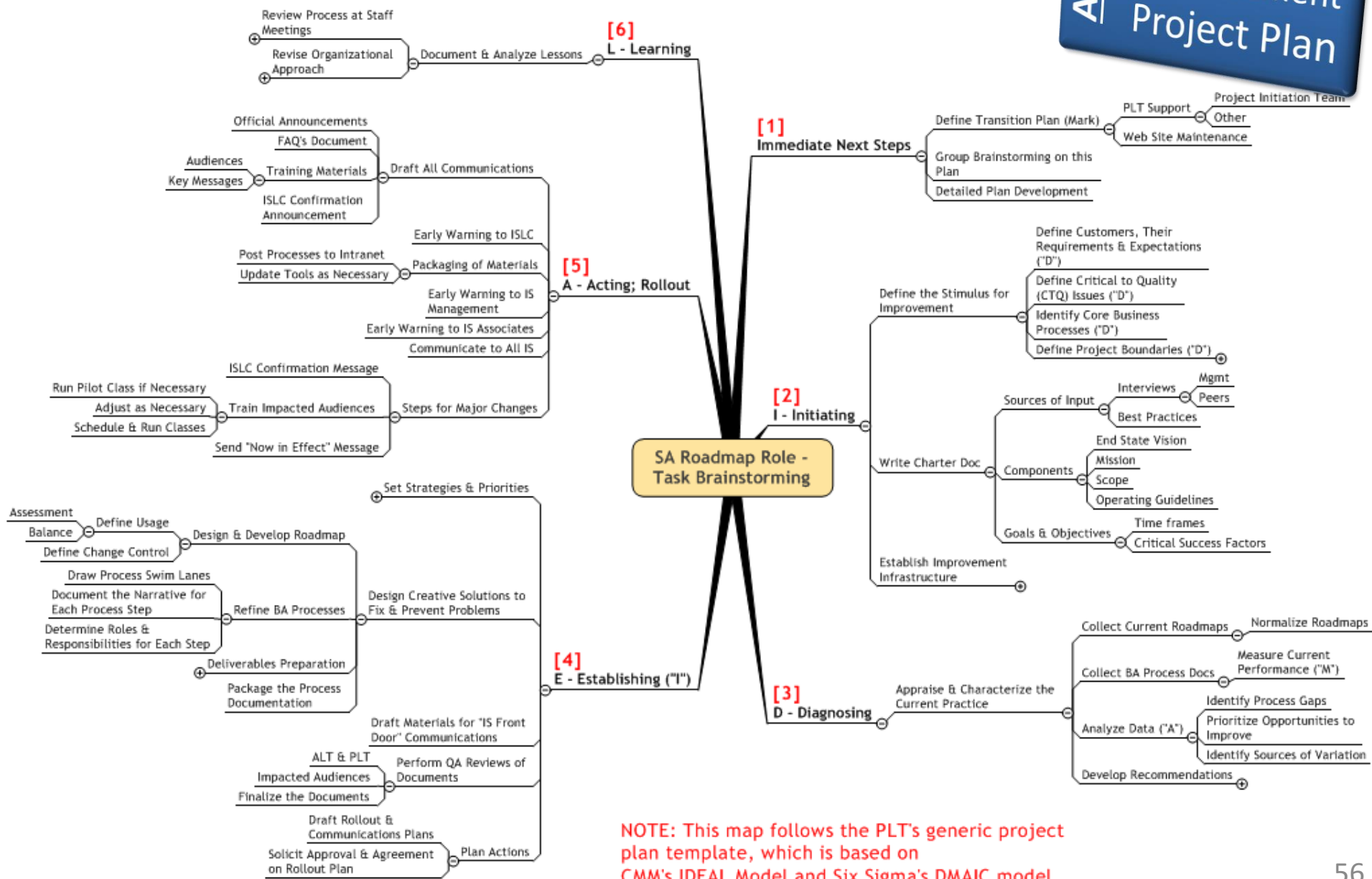
3: Cutover & P.I. Review



ABC IS Process Improvement Process



ABC IS Process Improvement Project Plan



NOTE: This map follows the PLT's generic project plan template, which is based on CMM's IDEAL Model and Six Sigma's DMAIC model.

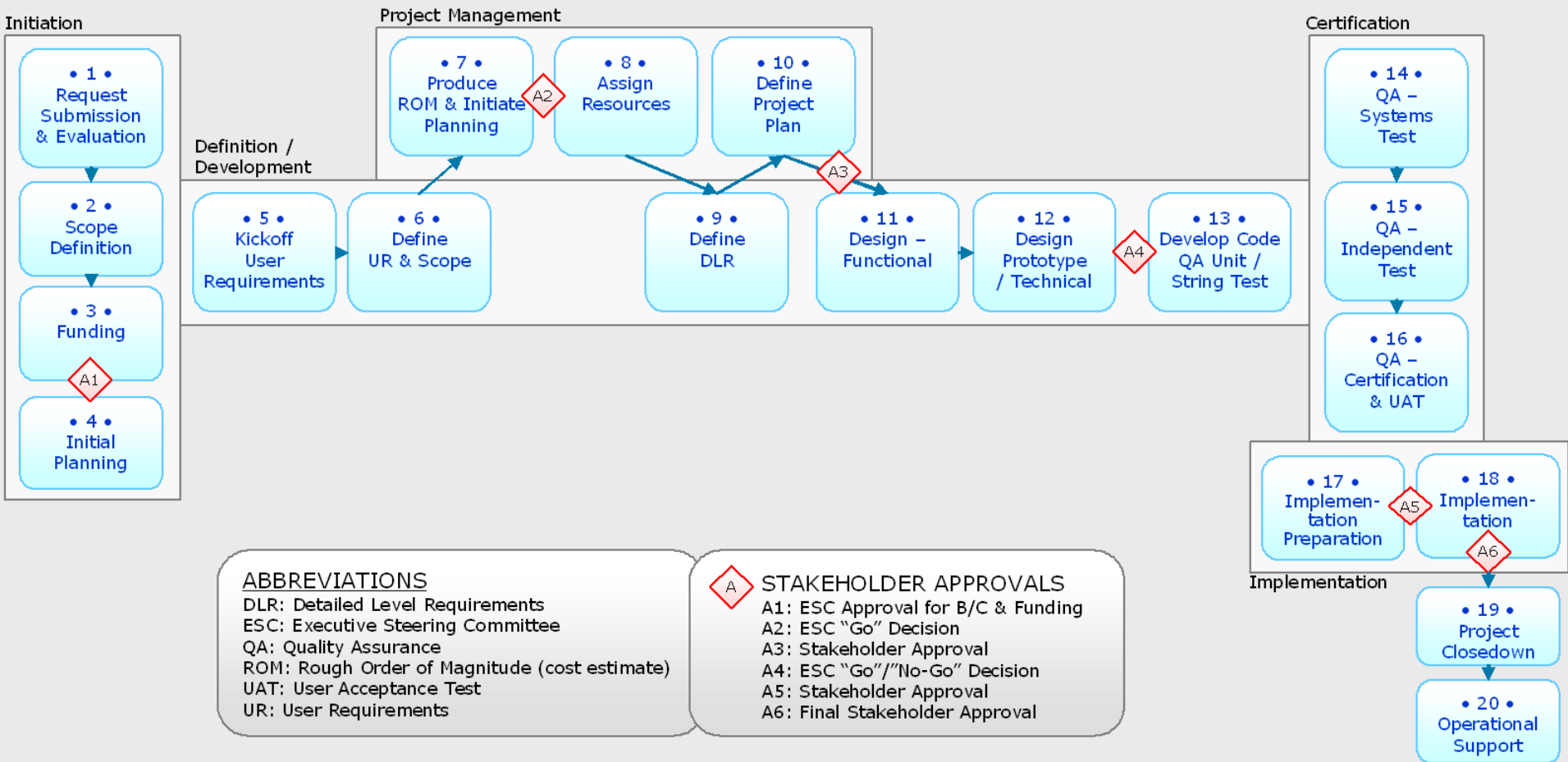
Responsibility & Assignment Matrix

I.S. New Tool Acquisition Process

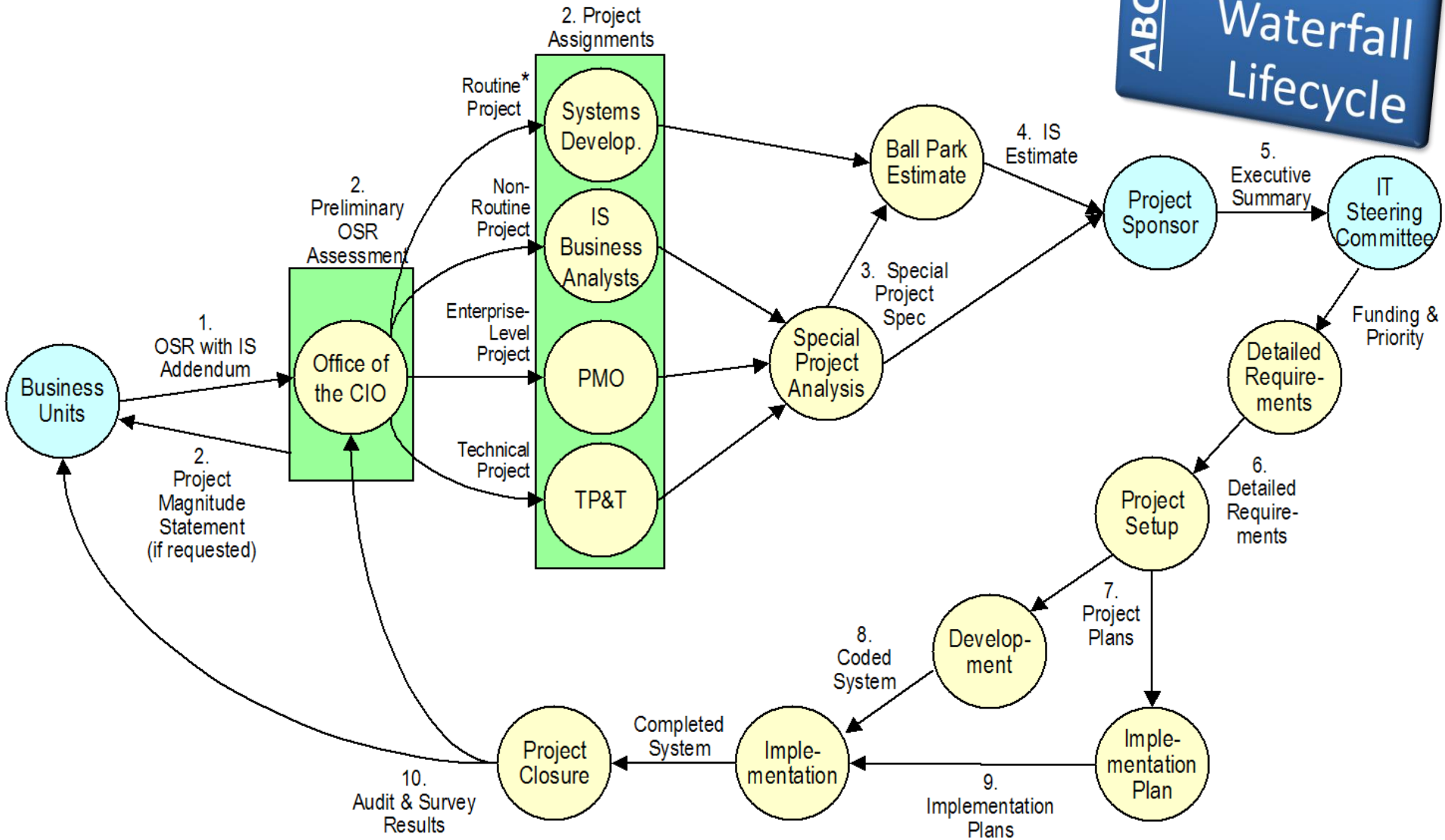


Step	Personnel				
	Q.A.	SME	Tool Team		
A. Determine Objectives & Direction					
1. Identify a Subject Matter Expert (SME) to assist the project	R	A			
2. Document needs, problems & opportunities	R	D			
3. Identify all potential users of the new tool, including I.S. and non-I.S.	R	D			
4. Survey users for their requirements; Classify as must-have's or nice-to-have's	R	D			
5. Quantify costs of the current situation; i.e. maintaining the status quo	R	D			
6. Evaluate the technical impact of tool (new hardware/software, upgrades, etc.)	R	D			
7. Estimate total costs of the project & total cost of ownership (TCO) of the tool	R	D			
8. Calculate the project's return on investment (ROI)	R	D			
9. Prepare & present an OSR to the IT Steering Committee for approval	R				
B. Evaluate & Recommend New Tool					
10. Assemble a tool team to assist in the review process	R	D	A		
11. Collect baseline metrics for current processes (see step 36)	R	D	D		
12. Document requirements for new tool, both conceptual & technical	R	D	D		
13. Define quantifiable project objectives & user-acceptance success criteria	R	D	D		
14. Identify alternatives via Gartner, Internet & other industry resources	R	D	D		
15. Contact vendors; Create schedule for reviewing product demos/documentation	R	D	D		
16. Rate each product quantitatively against each of the defined requirements	R	D	D		
17. Contact references for highest rated tool; Visit customer site to see it in action	R	D	D		
18. Estimate internal effort to install tool, customize tool & write standards	R	D	D		
19. Assess the need for ongoing technical support: Skill levels, Alternatives, Costs	R	D	D		
20. Draft plans for installation, training & implementation	R	D	D		
21. Re-calculate total project costs, ROI & TCO; Re-present OSR if required	R				
22. Write management summary: Goals, Alternatives, Decision Process, Recommendation, Costs/Benefit Assessment, Implementation Plan	R	D	D		
23. Walkthrough the management summary for I.S. management approval	R	D	D		S
C. Implement					
24. Send SME (and tool team if appropriate) to vendor training	R	A	A		
25. Determine training approach for remaining potential users	R	D	D		
26. Prepare & deliver a management overview or demo of product	R	D	D		
27. Arrange for ongoing technical support	R	D	D		
28. Install, test, tune & customize new tool; Add to Skills Inventory System	R	D	D		
29. Draft preliminary standards, guidelines & reference card for tool	R	D	D		
30. Identify & train a pilot team; Collect feedback on training from pilot team	R	D	D		



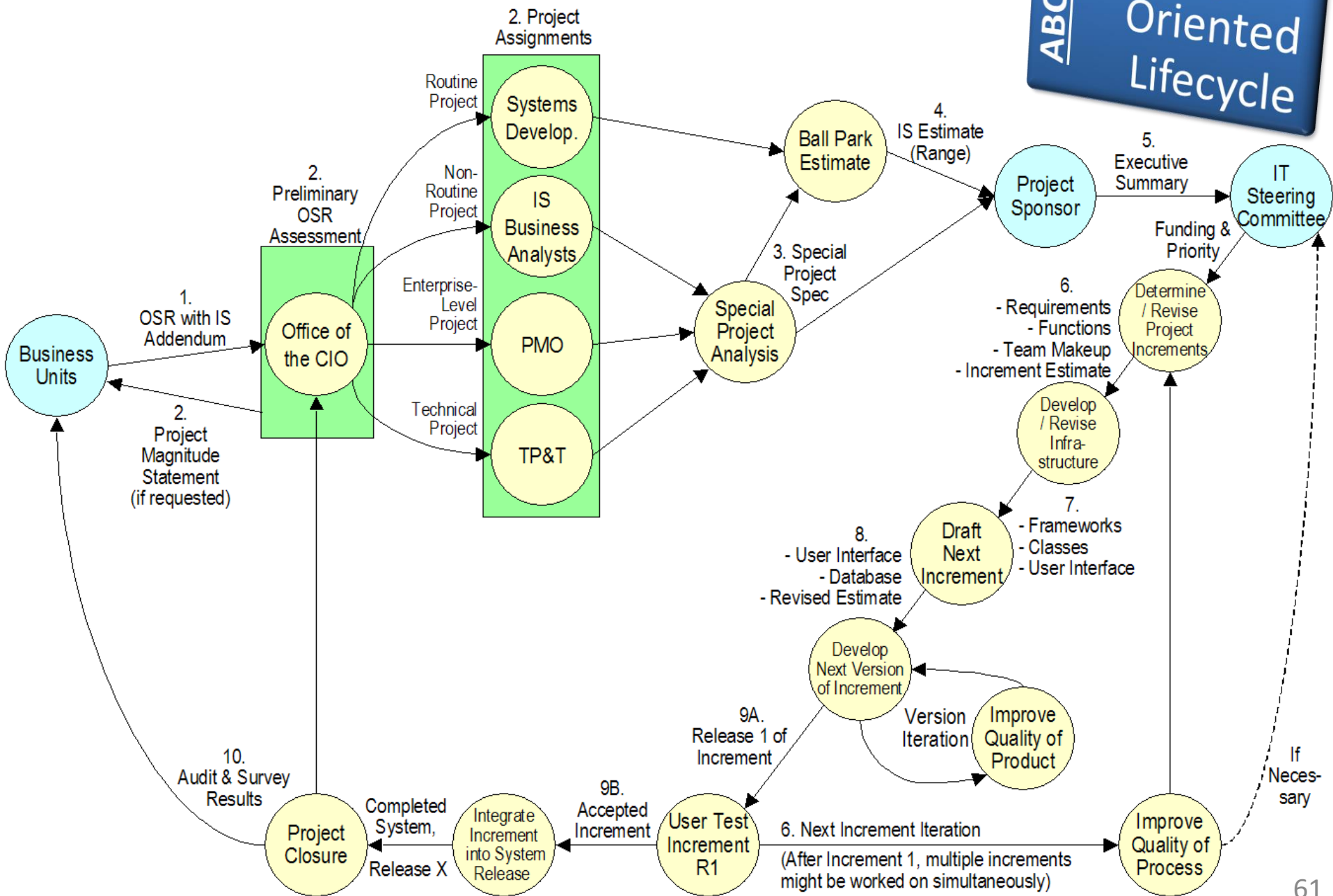


ABC IS Traditional Waterfall Lifecycle

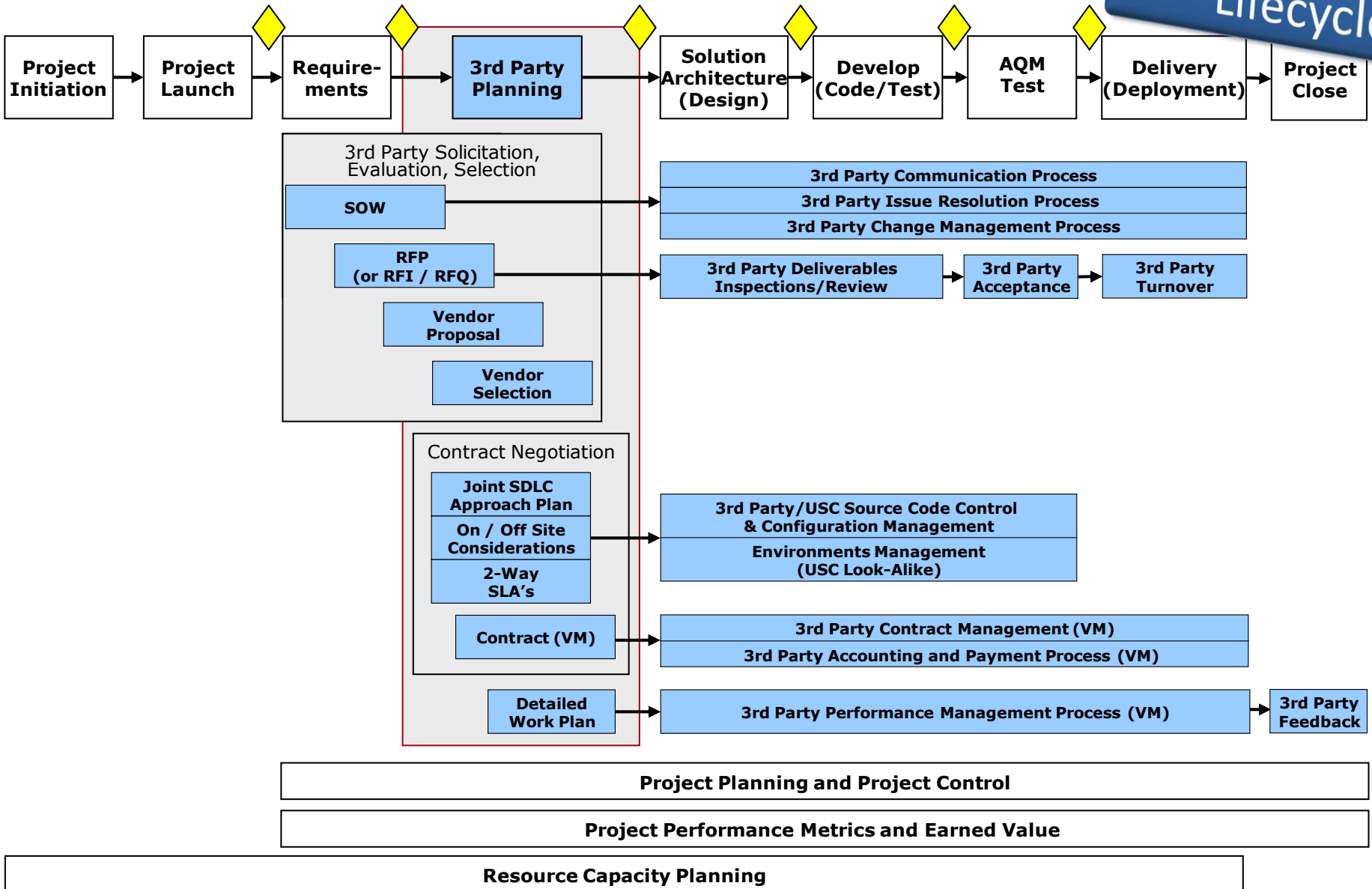


* A routine project is one that IS has done multiple times previously (e.g. changing a PIT edit), or involves data changes only, not changes in business logic, process, or functionality.

ABC IS Object-Oriented Lifecycle



ABC IS 3rd Party Development Lifecycle





Request Central

Non-Routine Requests

EXAMPLES:

- New Functionality Requests
- Strategic Initiatives
- Enhancements
- Quick Hits

Routine Requests

EXAMPLES:

- Service Requests
- Break/Fix Repair
- Maintenance

Work
Queues

Completed

ABC IS
ISSLC: IS
Solutions
Lifecycle

IS Solutions Life Cycle

Project
Assessment &
Review

Initiation

Analysis/
Business
Req'ts

Design

Build
& Test

Implement

Support
&
Operations

Retire /
Renew

Sunset
& Replace-
ment Plans

Approved
Requests

Scoped &
Resourced
Project

Approved,
Detailed
Requirements

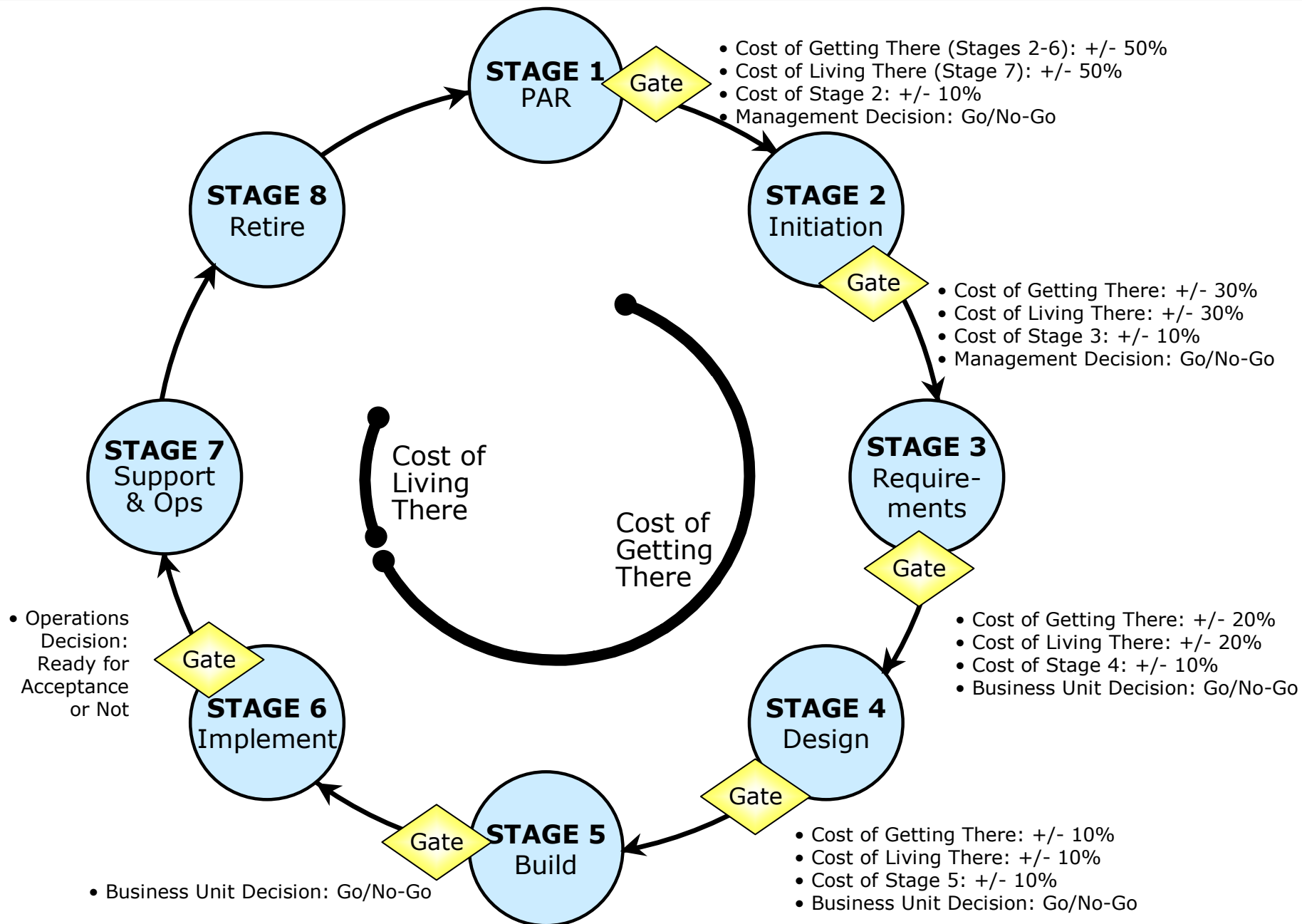
Approved,
Feasible
Design

Certified
System or
Upgrade

Solution in
Production

Aging
Solutions

ISSLC: Gates & Accuracy of Estimates



ISSLC Gates: Avoiding Unnecessary Work

Each gate is a decision point where requests deemed unworthy to proceed are weeded out. Shown here are the reasons at each Stage why a request might be turned back, and who would make that decision. At any of these gates, it may be appropriate to cycle the request to an earlier point in the ISSLC process. [Stage 8 is not applicable.]

Stage 1 PAR	Stage 2 Initiation	Stage 3 Analysis/BR	Stage 4 Design	Stage 5 Build/Test	Stage 6 Implement	Stage 7 Support/Ops
BPO ----- Request not a good idea or proves too costly ESC/ISLC ----- Request not deemed important enough	BPO ----- Funding for project or original business need changes	BPO ----- Failure to agree on Scope or Requirements; Requirement discovered that cannot be implemented	BPO ----- Failure to converge on an acceptable Design	BPO ----- Unacceptable schedule slippage; Uncontrolled "scope creep"; Failed "user acceptance test"	BPO ----- Failed project implementation	BPO ----- Excessive outages; Unacceptable error levels

PAR Gates: Avoiding Unnecessary Work

Each gate is a decision point where requests deemed unworthy to proceed are weeded out. Shown here are the reasons at each Phase why a request might be turned back, and who would make that decision. At any of these gates, it may be appropriate to cycle the request to an earlier point in the PAR process.

Concept	Insight	Prioritization	Business Case	Project Selection	Release Planning
Requester's Manager or BPO ----- Request is not a good idea	BPO ----- Request would be too costly	BPO ----- Delivery would be too late Prioritization Committee ----- Project deemed not important enough	BPO ----- ROI not significant enough BPO ----- Unforeseen requirements or project factors	Executive Steering Committee ----- Project deemed not important enough	BPO ----- Proposed schedule would be too late

SOA Strategy

The title "SOA Strategy" is rendered in a bold, dark gray, sans-serif font. It is positioned on a 3D, light gray, circular disc that has a slight bevel and a soft shadow beneath it. The disc is tilted slightly, and the text is reflected on its surface, creating a sense of depth and modernity.

Statement of Opportunity

- One of the key leading practices in the IT industry is the concept of Service-Oriented Architecture (SOA).
 - The primary value proposition of SOA lies in **business agility** – “increasing the reuse of services and business rules, by allowing internal processes to be driven by established and trusted business data, resulting in nimble response to changing conditions” (Corp Exec Board).
 - IS has embarked upon the SOA journey with a number of initiatives by various IS groups. We can benefit by ensuring that all these efforts are aligned and building in concert toward a mature IS SOA capability.

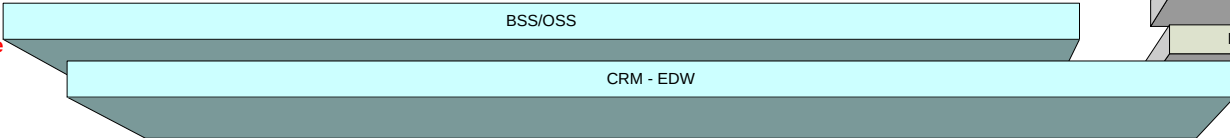
 People	 Process	 Technology
IS - is leading the business in the governance of SOA - is promptly developing robust services - is effectively deploying services - is efficiently monitoring services & resolving issues Business partners - are trained on the concept and impact of SOA - are providing leadership and governance - are acting as SMEs for new service definitions - are thinking with a service mindset and envisioning new solutions that capitalize on SOA opportunities	- The links and interfaces among SOA, eTom, BPM, ITIL and other disciplines are defined * Leading practices for service development are implemented throughout IS Service Repository processes are in place Technical training resources are finalized for IS associates, and made available as needed - Training processes and materials are identified for business partner training - All related process documentation is updated and communicated appropriately * <u>Abbreviations</u> eTom: Enhanced Telecom Operations Map (TMForum) BPM: Business Process Mgmt/Modeling ITIL: IT Infrastructure Library	- After analysis of SOA approaches and alternatives (such as WOA) our near-term architectural approach is adjusted to enhance results and minimize risk - A long-range Roadmap for SOA implementation, integration, and adoption is created and placed under change control - Existing templates used in the IS SDLC are tweaked to support service development - Appropriate tools will be selected and rolled out - The Services Catalog is updated and rolled out - The Services Repository is updated and rolled out - Appropriate metrics are defined, collected, reported and operated on

Dream Statement

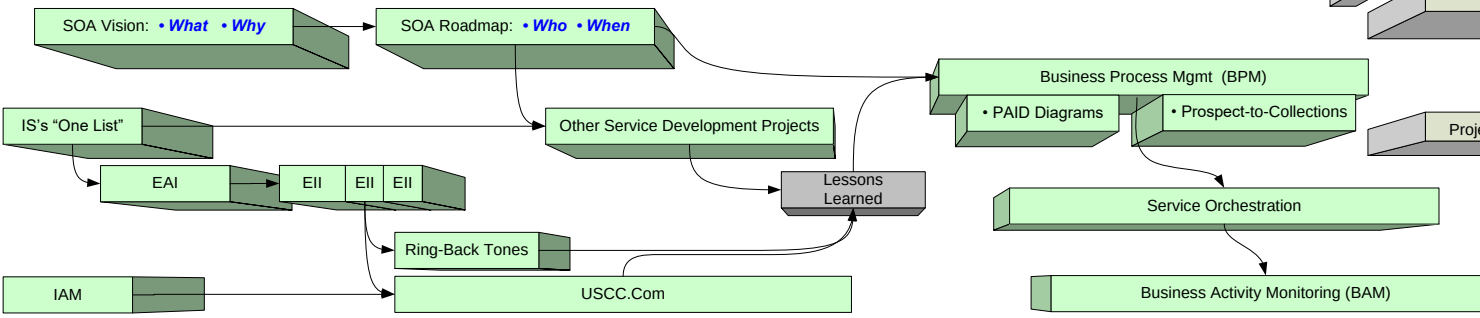
- Imagine the business agility that could result if IS could deliver robust business services in a matter of days or weeks instead of months. Imagine further, if some business solutions could be built and implemented by our business partners without any IS involvement. And imagine business interruptions no longer occurring, as self-healing networks and systems resolve incidents transparently to our customers and business partners through automated monitoring and recovery processes. Finally, imagine the cost of IT decreasing 20% (per Gartner Group). SOA promises faster, cheaper, better, more business-aligned, and more customer-focused IT.
- These capabilities would give USCC a significant competitive advantage in the wireless telecom space.

SOA Big Picture

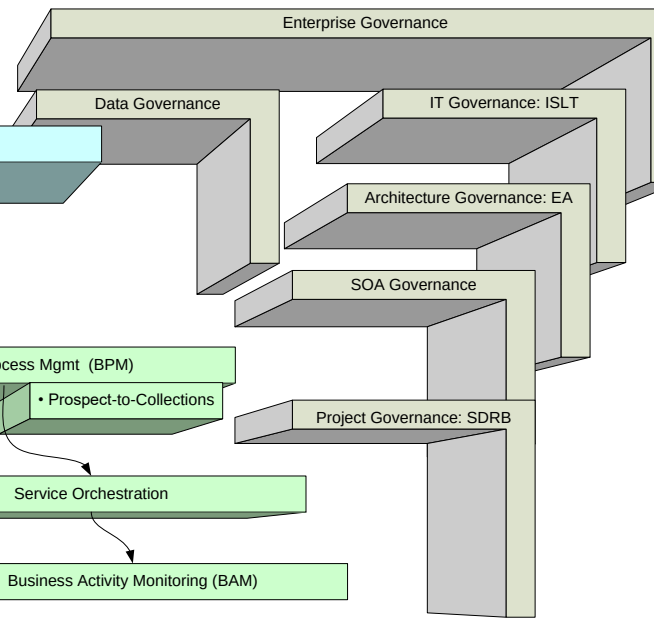
Major Enterprise Initiatives



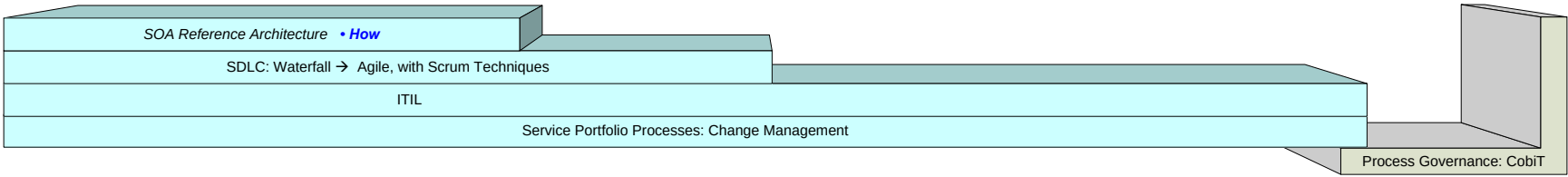
Major IS Initiatives



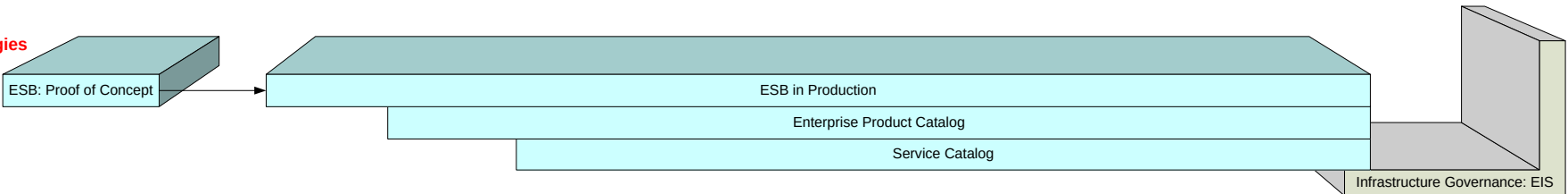
Governance



Frameworks



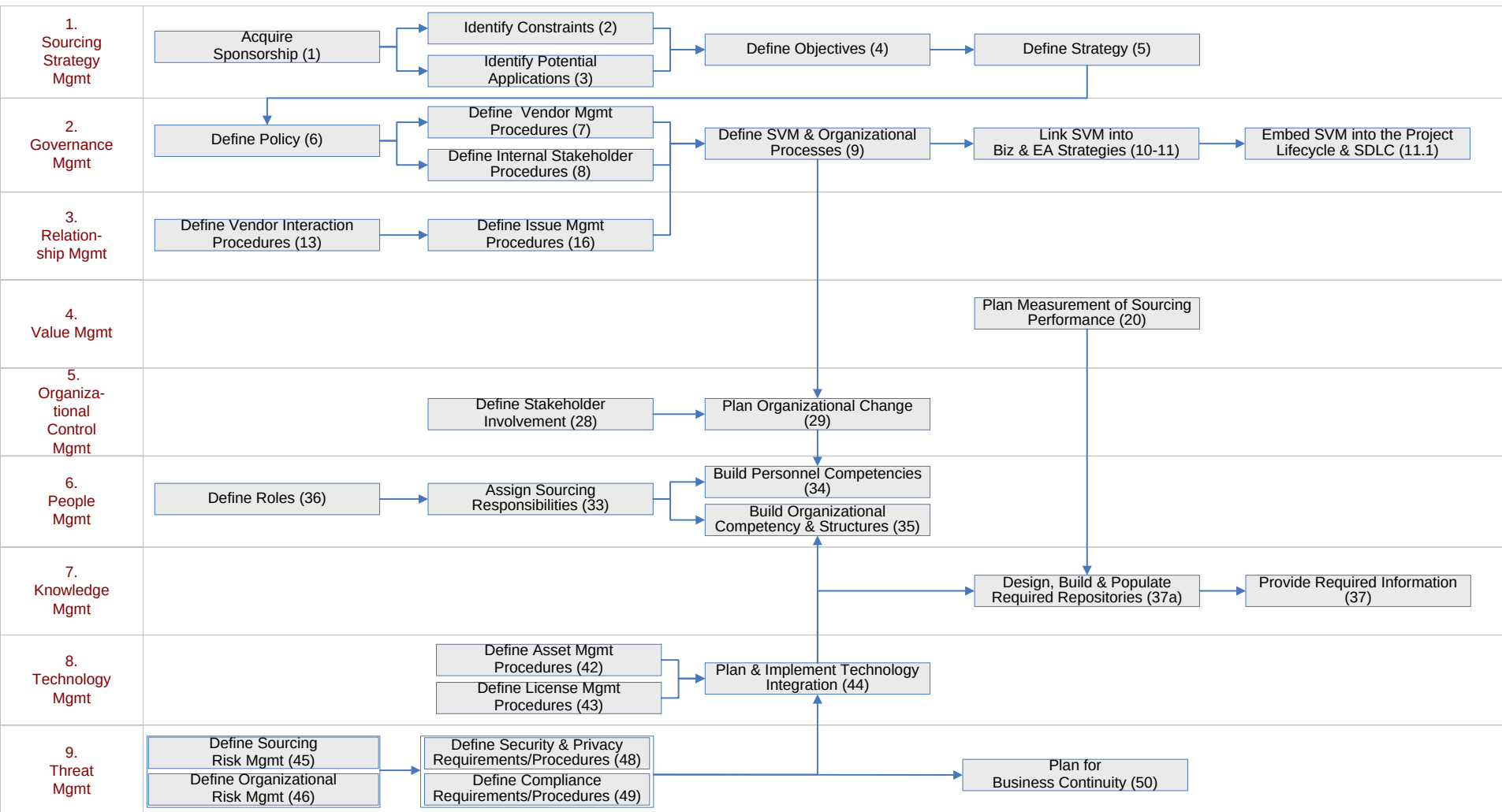
Enabling Technologies

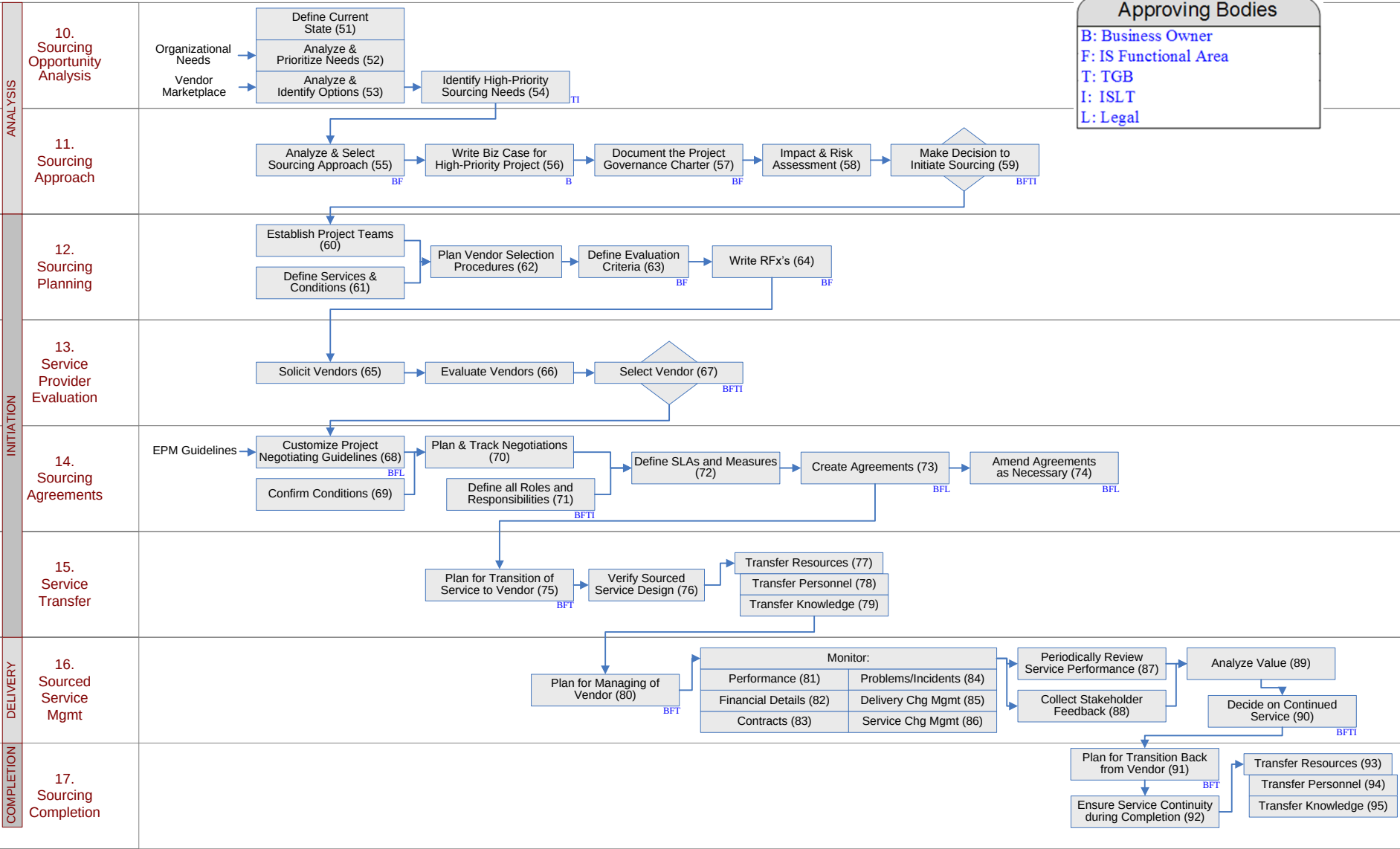


Sourcing

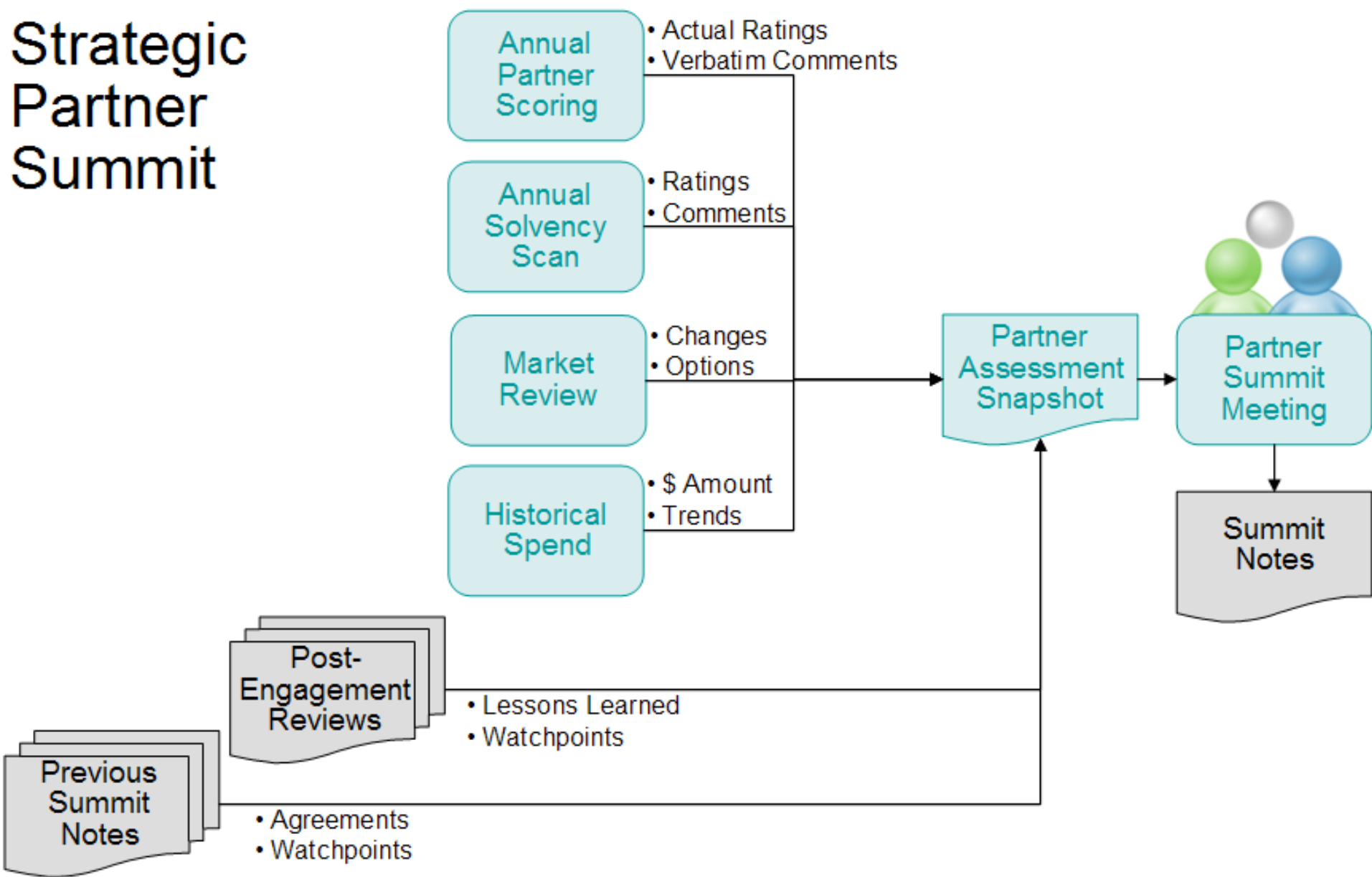
A 3D rendering of the word "Sourcing" in a bold, sans-serif font. The text is positioned on a circular, reflective platform that resembles a polished metal or glass disc. The platform has a slight rim and a smooth, reflective surface that mirrors the text above it. The background is a light blue gradient, and the overall lighting is soft, creating a professional and modern aesthetic.

IS STRATEGIC SOURCING





Strategic Partner Summit



Strategic Partner Snapshot Report



Key Products & Services Used in IS

Key Products	Key Services
McNamara:	• N/A
• Storage Foundation Enterprise (Veritas)	
• NetBackup Server, Client, Cross Platform	
Wharton:	
• Altiris	
• Wise	

IS Historic Spend

2006	2007	2008 YTD
CapEx: \$2.4MM	CapEx: \$0.3MM	CapEx: \$57K
OpEx: \$55K	OpEx: \$72K	OpEx: \$927K

Most Recent Internal Assessment

Date	Avg Score (0-3pt scale)	Verbatim comments from raters
Jun '08	2.1 / 3.0 --- --- --- 0 1 2 3	• Veritas invoices are always wrong. • Veritas invoices do not distinguish between IS and Engineering. • Wise software is very robust. Altiris software is less so, with non-responsive issue resolution.
Watchpoints (items with lowest scores)		
• Price Competitiveness • Cost Reduction Ideas		

Legal or Contract Issues

NDA	None
MSA	None
Contracts	None
SOW	N/A
SLAs	N/A

General Comments

Opportunities	• Veritas invoices could indicate IS vs. Engineering
Concerns	• Accuracy of Veritas invoices • 2nd-Level Help-Desk response • Price competitiveness

Post-Engagement AAR Summary

Date	Watchpoints & Agreements
N/A	• N/A

Most Recent USCC-Vendor Summit

Date	Watchpoints & Agreements
N/A	• N/A

Most Recent Solvency Scan

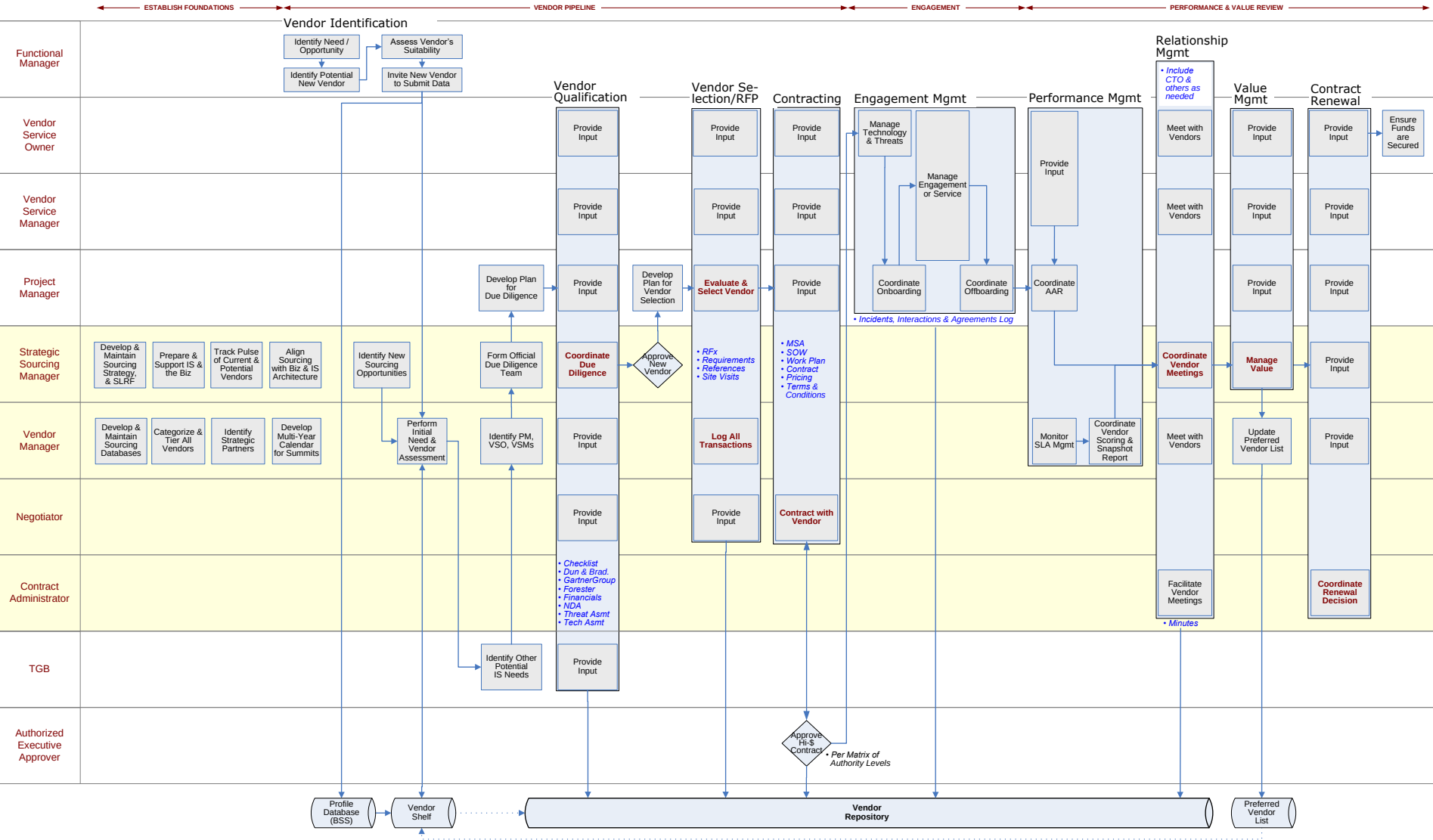
Date	D&B Rating	Pertinent comments
N/A		• N/A

Competitive Landscape Review

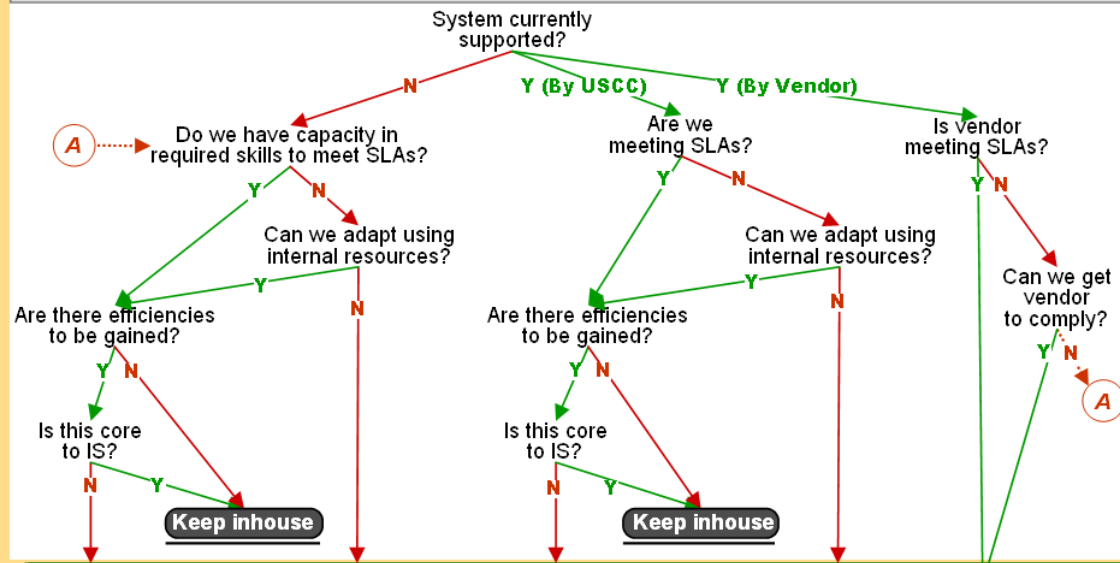
Date	Source	Pertinent comments
2007-08	GartnerGroup	• Clear market leader of E-Mail Active Archiving (Veritas Enterprise Vault); arguably second only to Microsoft in PC Lifecycle Configuration Management (Altiris); dropped from Leaders quadrant in Storage Resource Management (Veritas NetBackup, et al.) due to declining ability to execute. Acquisition watchpoints: migrate from Symantec LiveState, leverage access to AppStream in future product bundles, review new contract terms and discounts from Veritas acquisition.
2007	Forrester	• Solid leader in Client Management Suite (Altiris) for current feature set and market position, however, HP leads in product strategy. Strategic watchpoints: Symantec has acquired more than 30 companies in the past seven years; the Altiris products will not be fully integrated with Symantec's existing security products until at least 2009; there is no strategy for a complete IT management software suite.
Apr '08	Baseline Mag	• Symantec & Veritas merged in '04; Project Oasis was problematic; Project Nero supposedly fixed things; Are our invoicing issues a result of this?; When can we expect accurate invoices that distinguish IS from Engineering?

Vendor Scoring Questionnaire - Symantec

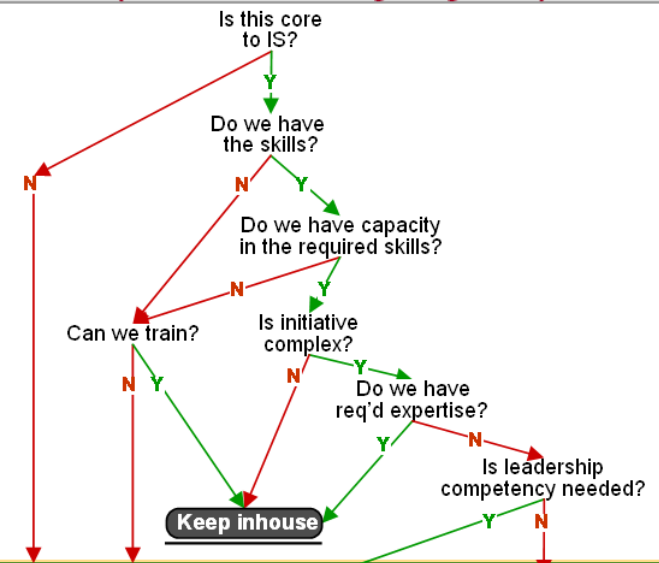
Vendor Scoring Questionnaire - <i>Symantec</i>					Rating: 0 (Lo) - 3 (Hi)					Comments (if needed to clarify rating)
					AVG.	Raw Ratings				
General	G1. Strategic Fit and Directional Alignment with USCC IS	1	Ethics & Integrity	Vendor operates with ethics and integrity in all dealings.	2.8	3	3	2	3	
		2	Partnership Attitude	Works as a trusted partner with USCC IS. Displays concern for USCC IS and its customers.	2.0	3	2	1	2	
		3	Market Positioning	Vendor's future roadmap is detailed, up-to-date, easy to understand, and matches our needs. Vendor's planned feature development is well aligned with us and takes our needs into account.	2.3	2	2	2	3	
		4	Product Enhancements	Past improvements of the vendor's products/service have benefited USCC cost, service or competitive position.	2.3	3	2	2	2	
		5	Cycle Time Improvement	A measure of the vendor's ability to reduce their internal process/cycle time. Reduction in cycle time should equate to a reduction in the overall lead-time.	2.0	2				
	G2. Value	6	Price Competitiveness	How competitive the vendor is in overall pricing when compared to other vendor's. Pricing in the same range as competitors would be considered an average score, while pricing better than competitors yields a higher score.	1.3	1	1	2	1	
		7	Few Unanticipated Add-On Costs	Additional costs, implemented by the vendor, that exceed the original quoted price. More occurrences would a lower the score; No additions would yield a high score.	2.0	1	1	3	3	
		8	Cost Reduction Ideas	How often and how important are the ideas to benefit USCC IS that are submitted by the vendor, compared to other vendors.	1.3	3		1	0	Would like to see some action in this area
		9	Vendor Savings Sharing	As a vendor's technology, market and other forces provide them with cost savings, how much is passed on to USCC IS and how willingly.	2.0	2	2	2		
		10	Gratis Service (no incremental costs)	The value of free products/services to USCC ("over and above" the normal requirements, where USCC incurs no extra cost).	2.0	3	3	2	0	None that I am aware of.
		11	Cost Trends	How is the vendor's total cost structure trending compared to related markets. Prices trending in the same direction as the market would yield a good score.	1.8	2	2	1	2	
	G3. Sales Process	12	Quote Process	Timely and accurate process.	1.8	1	1	2	3	
		13	Sales Personnel Knowledge of USCC IS	Knowledgeable about how USCC IS operations would be best served by the vendor products, services and ideas.	2.3	3	3	1	2	
		14	Sales Personnel Product Knowledge	The sales persons' detailed knowledge of their product and how it could be used to solve USCC problems and/or improve USCC competitive position.	2.0	2	2	2	2	
	G4. Administration	15	Flexibility	The vendor's ability to react to change requests and still deliver within the agreed upon time frame.	2.0	2	2	2		
		16	Legal Administration	Ease of establishing the relationship: MSA, NDA, RFx, contracts, etc.	2.0	2	2			
	G5. Operations & Support	17	Administration Accuracy	Legal documents, invoices and receipts submitted error free.	0.0	0	0			Veritas invoices are always wrong; Natzke between IS & Engineering.
		18	Customer Service Responsiveness	The vendor's promptness at communicating the action to be taken, regarding complaints or requests, and completing the action accurately within the stated time frame.	1.8	2	2	2	1	Level 2 support area is slow to respond.
		19	Post-Sales Support	A measure of how interested the vendor is in keeping our business based on the manner in which our post sales needs and requests are handled.	2.3	3	3	2	1	Sales Rep change with no proactive comm
	G6. Compliance & Certification	20	Proactive Communications	Communication of problems or outages as quickly as possible.	2.0	2	2			
		21	Industry Standards and Regulations	Compliance with PCI, CPNI, etc.	3.0	3		3		
		22	Local Compliance	Compliance with local/onsite policies and procedures.	3.0	3				
		23	Certification	Certified in appropriate disciplines (ITIL, ISO-17799, etc.) as needed.	3.0	3				
		24	Diverse Vendor Development	A measure of the vendor's utilization of small, minority and women-owned businesses in their efforts to fulfill their sales and service requirements.						
	G7. SLA's	25	Performance against SLAs	Performance against SLAs and reporting requirements.						
Products	P1.	26	On-Time Delivery Performance	Ability to ship product on time in relation to the requested due date.	2.7	2	3		3	
		27	Minimum # of Warranty Claims	A measure of the vendor's product delivered quality.	3.0	3	3		3	



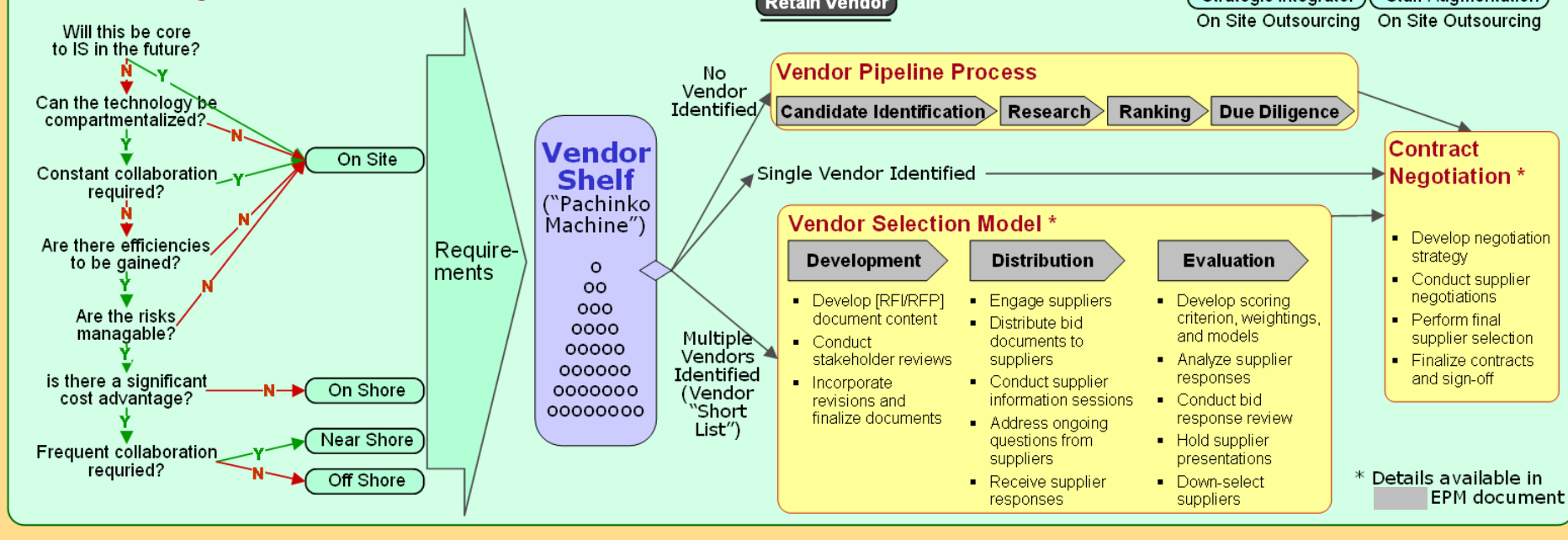
FUNCTION / APPLICATION SYSTEM (Sustain)



PROJECT (Plan/Realize)
(TGB indicates Strategic Alignment)



External Sourcing Model



9. Strategy: Risk Management Overview

The following table summarizes (from the industry research) the Risks, Challenges, and Pitfalls commonly experienced in SVM. It also indicates our approach to mitigate each of them.

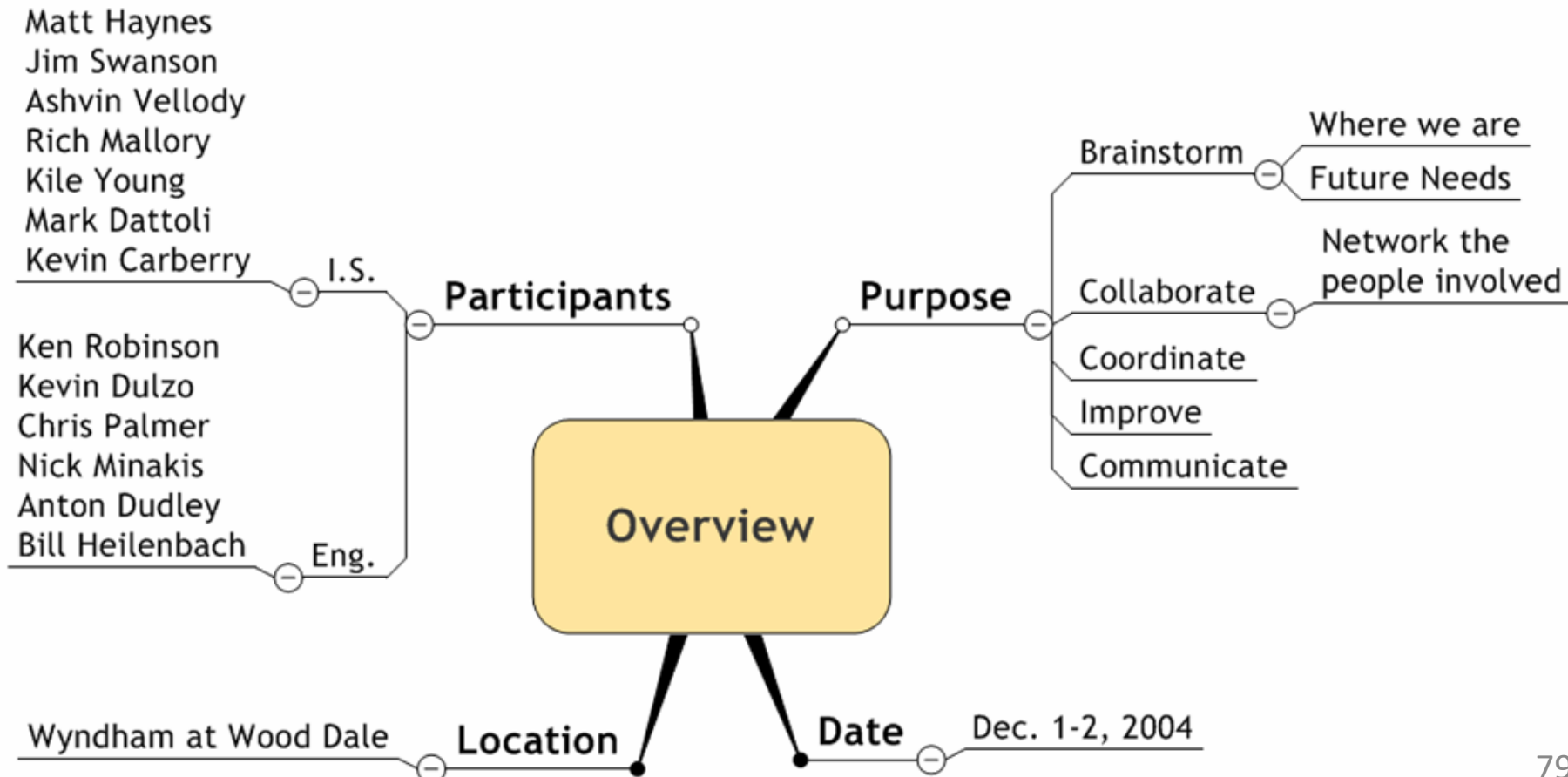
Area	Risk	Mediation
A. Sourcing Strategy		Build & staff a central SVM Function
1.	Piecemeal outsourcing versus planned vision/roadmap	Define & communicate SVM vision and policy
2.	Lack of objective sourcing criteria	Define & communicate sourcing criteria and SVM procedures
B. Inadequate Due Diligence		Define the contract lifecycle process
3.	Poor initial cost baseline	Maintain currency with prevailing rates (in place)
4.	Subjective negotiation targets	Communicate & employ guidelines as published by EPM
5.	Failure to specify clear SLAs	Define & communicate SVM templates
C. Uncoordinated Purchasing		Define roles for sourcing
6.	Siloed purchasing prevents enterprise scale	Centralized asset management function (in place)
7.	Poor asset tracking leads to unnecessary purchases	Centralized asset management function (in place)
8.	Acquisition of nonstandard systems	Validate major decisions through TGB-ISLT (in place)
D. Lack of Transparency to Cost and Risk		Define vendor lifecycle process
9.	Nonstandard contract terms increase liability risk	Define standard agreement types (in place)
10.	Lack of visibility toward competitive market prices	Continual focus on maintaining an updated vendor Shelf
11.	Risk of reliance on financially vulnerable vendors	Perform regular solvency scans, especially for key vendors
E. Reactive Relationship Management		Build a vendor repository; Do regular scoring
12.	Inconsistent/inadequate service quality	Define & communicate leading practices for 3rd-party mgmt
13.	Poorly defined criteria for measuring performance	Define a prototype template for performance criteria
14.	Difficulty in achieving continuous productivity/performance improvements	Address issue at summit meetings, as needed
F. Inadequate Oversight/Governance		Build a Sourcing Gov Board (SGB) & define roles
15.	Insufficient investment in oversight	Define & communicate SVM governance, including SGB, TGB & ISLT
16.	Underestimation of management time needed	Staff appropriately; Communicate expectations to IS mgmt
17.	Equal investment in oversight, regardless of contract size or value	Segment vendors into Tiers with tier-specific governance (in process/place)
18.	Unexpected add-on costs after contract begins	Hold scheduled vendor-USCC summits, based on tier
19.	Lack of innovation	Address issue at summit meetings, as needed
20.	Didn't meet expectations for cost savings	Publish regular vendor status report; respond to identified issues
G. Lack of Contracting Flexibility		Standardize contracts
21.	Growing reliance leading to vendor "lock-in"	Identify feasible secondary & tertiary sources in the vendor Shelf
22.	Long-term contracts inflexible to changing needs	Build flexibility into standard contract templates
H. Miscellaneous Vendor Issues		Define procedures for common vendor issues
23.	Knowledge transfer	Have functional areas assess transfer plans as contracts approach end Include Knowledge Transfer in SOW/MSA (in place)
24.	Formal escalation	Ensure clear escalation process in every SOW
25.	Vendor employee turnover	Address issue upon occurrence, and at summit meetings
26.	Vendor complacency	Address issue upon occurrence, and at summit meetings

Architecture

A 3D rendering of the word "Architecture" in a bold, sans-serif font. The text is positioned on a circular, reflective pedestal that resembles a polished metal or glass surface. The word and the pedestal are reflected on the surface below them. The background is a light blue gradient.

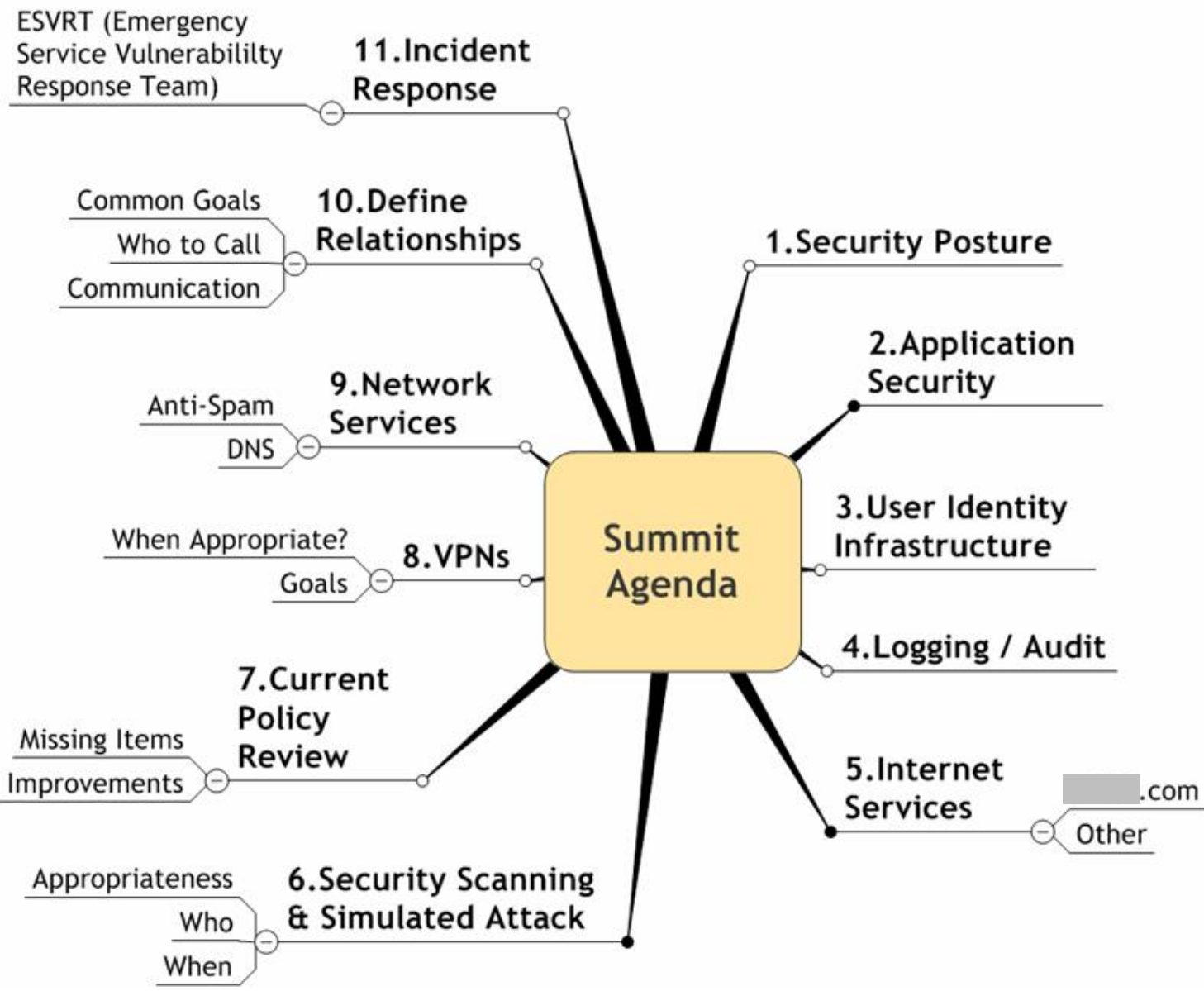


Data Security Summit



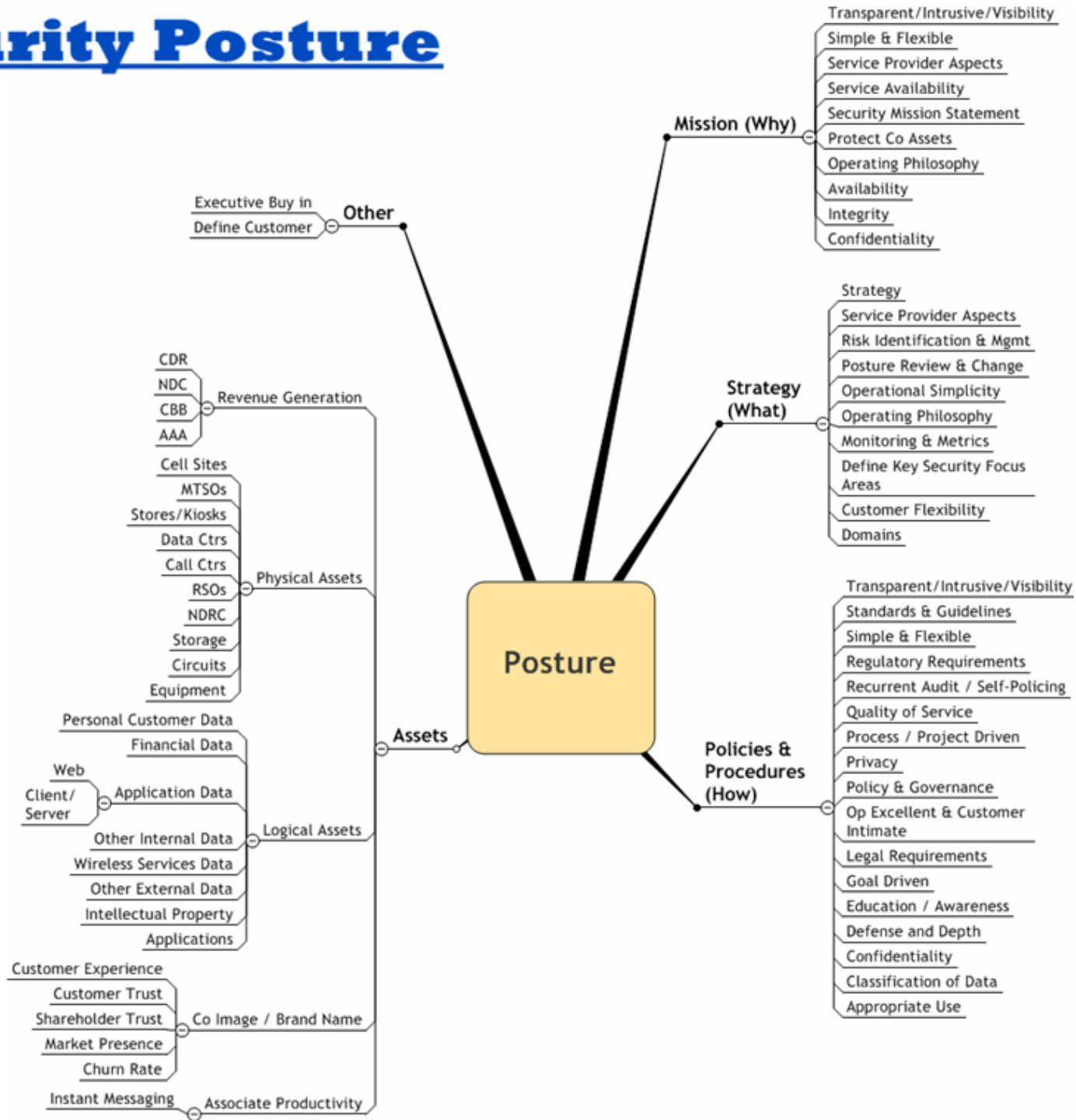


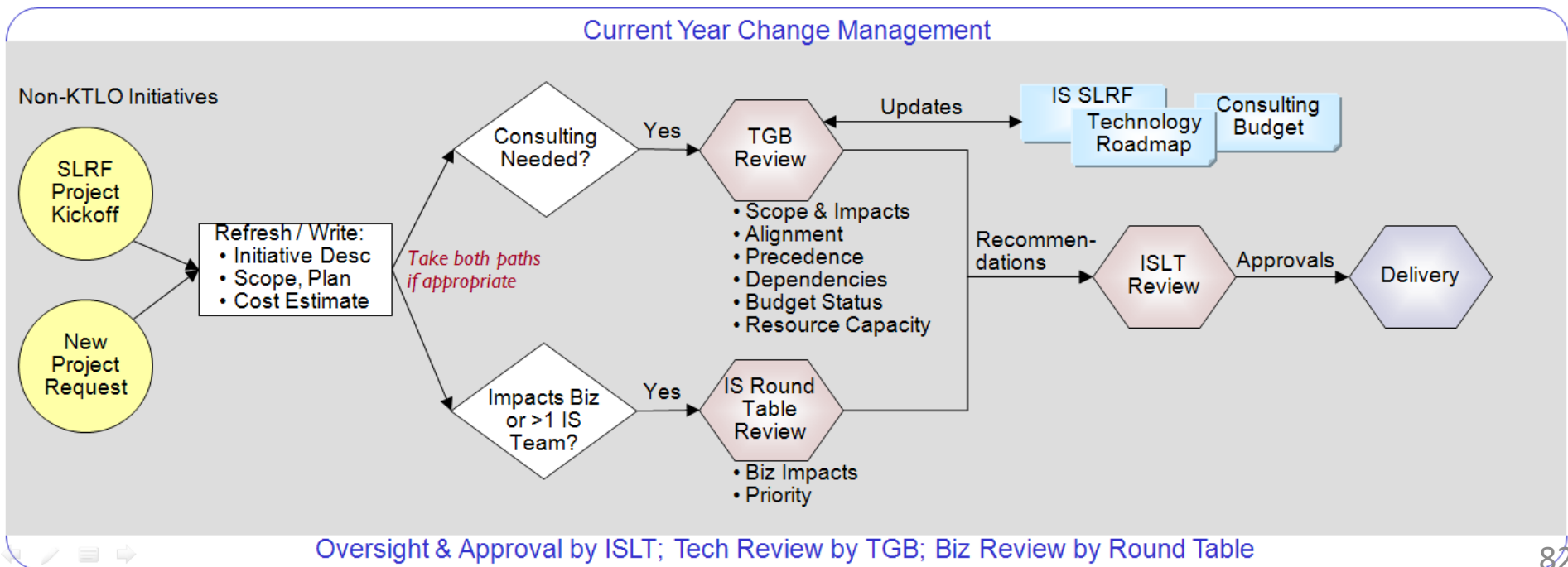
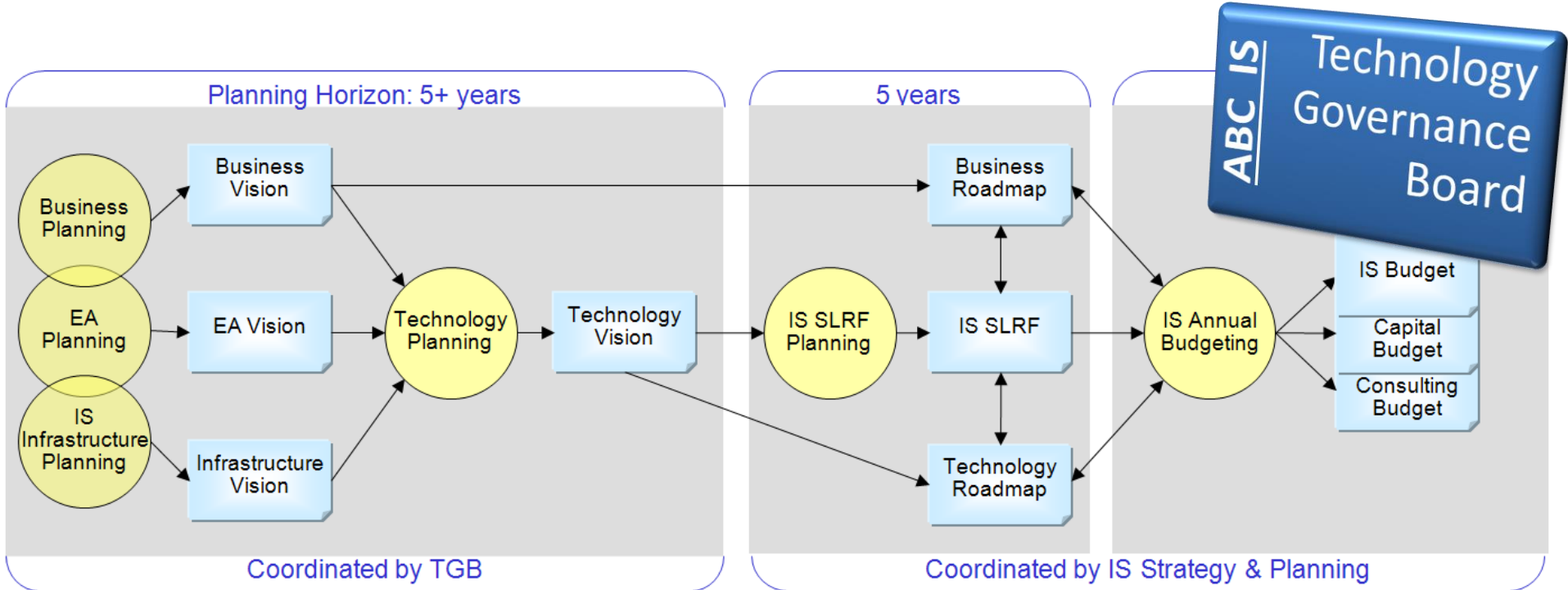
Summit Agenda



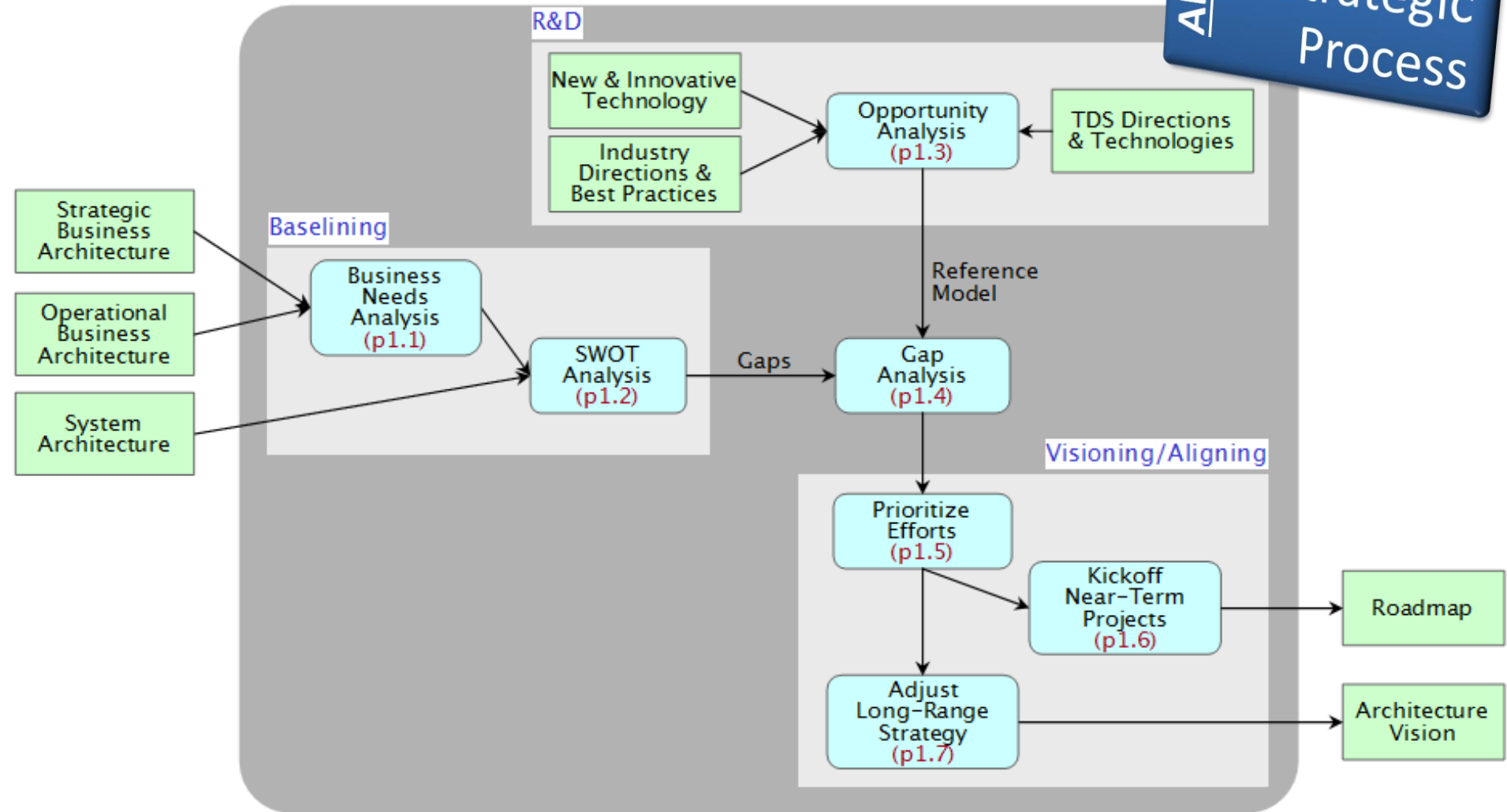


Security Posture





ABC IS Architecture Strategic Process



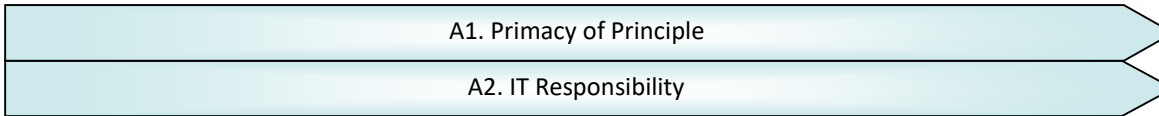
ARCHITECTURAL PRINCIPLES

Categories

Principles

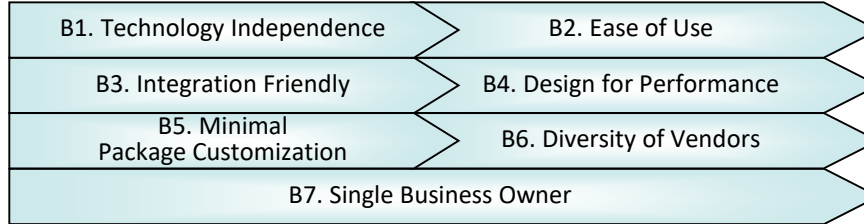
Results

General Principles



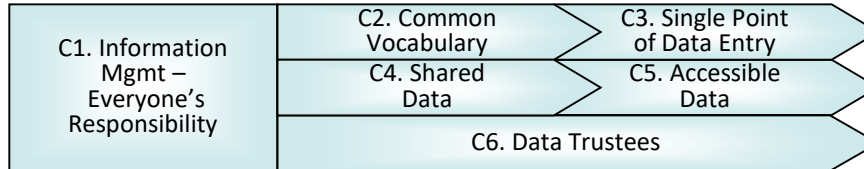
A3. Maximized Enterprise Contribution

Applications



B8. Common Use

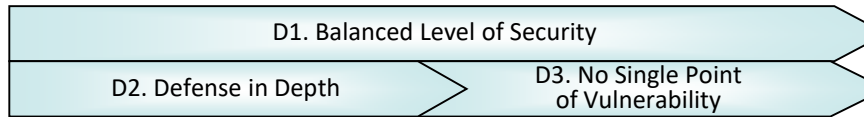
Data



C7. Secured Data

C8. Protected Intellectual Property

Security



D4. Business Continuity

D5. Enhanced Monitoring

D6. Compliance to Law & Regulation

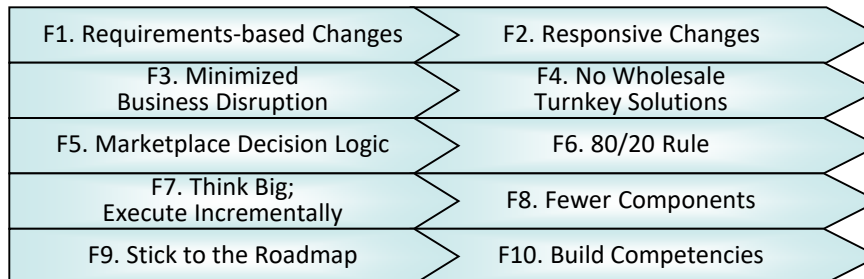
Managed Technologies



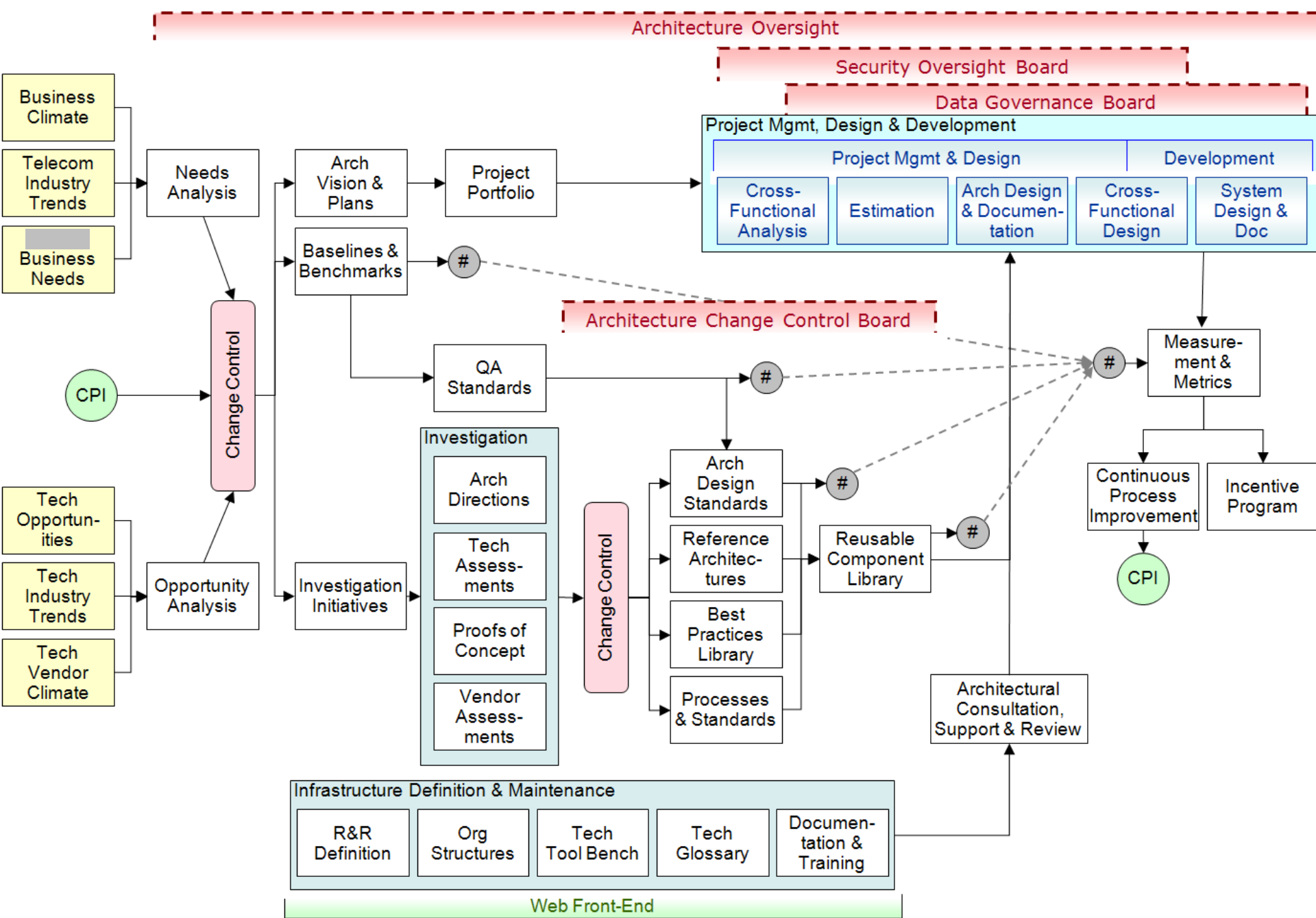
E5. Standardized Platforms

E6. Adaptive Architectures

Change Management



F11. Enhanced Monitoring



Application: _____



Area	Criteria	Weighting Factor	Rating	Weighted Score	Area Average
Functional Quality (FQ)					
General	Functionality, Change Request History	6			
	Availability	4			
	Accuracy	2			
	Reliability, Problem History	2			
	Error Prevention	2			
	Auto-Balancing, Error Detection/Correction	2			
	User Documentation/Help	2			
	Ease-of-Use	2			
	Performance	2			
	Output	2			
	Flexibility/Expandability	2			
Complexity	Application Size	2			
	Primary Coding Language	2			
	Database Size	2			
	Data Redundancy	2			
	Data Distribution	2			
	Encryption	2			
	# Interfaces	2			
	# Reference Tables	2			
Maintainability	Cyclomatic Complexity Measure	2			
	Vendor Support	2			
	System Documentation	2			
	Skills Required	2			
	Skills Availability (in-house)	2			
	Skills Availability (external)	2			
FQ Total					
Technical Quality (TQ)					
General	Secure Access	4			
	Data Privacy	4			
	Architecture Design	4			
	Application Design	2			
	File Design	2			
	Currency of infrastructure (versions, etc.)	2			
	Reliability of infrastructure	2			
	Stability, MTTF	2			
	Standard Interfaces	2			
	Flexibility/Expandability	2			
	Integration	2			
Operational Quality	Startup, Shutdown	2			
	Ops Documentation	2			
	Operational Interface	2			
	Monitoring & Alarms	2			
	Backup, Restore	2			
	Application Recovery	2			
	Resource Demand	2			
TQ Total					
TOTAL					100

PROCESS FACTORS

Effort	Difficulty	Risk
1. Number of Reports 2. Number of Databases 3. Number of Interfaces 4. Number of Conversions 5. Overall Effort Size 6. "Chunk-ability" of Project 7. Project Team Size 8. Number of Contractors 9. Number of Users 10. Number of SMEs 11. Centralization/Distribution of Project Knowledge 12. Target Audience Impact (Size of Audience) 13. Target Audience Impact (Amount of Change)	1. Estimating & Planning Tools 2. Estimating Process 3. Architecture & System Design Process 4. Prototyping, Development, Testing & Build Process 5. Configuration Management Process 6. Simplicity of Tech Environment 7. User Availability 8. User Expertise with Goals 9. Team Tools 10. Team Co-Location 11. Time, Cost & Scope Flexibility 12. End Customers (Similarity of Needs) 13. End Customers (Skilled) 14. End Customers (Co-Located) 15. Target Audience Impact (Time to Assimilate) 16. Target Audience Impact (Transferability; Easy to Learn) 17. Target Audience Impact (Predictability) 18. Target Audience Impact (Audience Ability) 19. Target Audience Impact (Willingness) 20. Target Audience Impact (Values) 21. Target Audience Impact (Emotions) 22. Target Audience Impact (Knowledge) 23. Target Audience Impact (Behaviors) 24. Target Audience Impact (Logistics) 25. Target Audience Impact (Economics) 26. Target Audience Impact (Politics) 27. Project Quality Management 28. Project HR Management 29. Project Communications Management 30. Project Change Management 31. Project Procurement Management	1. Goal Clarity 2. Familiarity with Project Goals 3. Familiarity with Employed Technology 4. Estimating Accuracy 5. Management Commitment 6. Collaborative Culture 7. Minimal/Managed Political Climate 8. PM Experience/Skills 9. Re-scoping/Re-planning/Negotiation Skills 10. Team Experience/Skills 11. Project Integration Management 12. Project Scope Management 13. Project Time Management 14. Project Risk Management

A. Delivered Quality (inherent at delivery)	
A1. Capability	
Understandability	
Usability	
Correctness (to spec)	
Accuracy of Results	
Completeness	
Conciseness	
Consistency	
Responsiveness	
Self-Documenting	
Self-Help/Training	
Error Tolerance	
A2. Dependability	
Auditability	
Security	
Longevity	
Traceability	
Testability	
Verifiability	
Vulnerability	
A3. Agility	
Generality	
Simplicity	
Structuredness	
Modularity	
Standards-Based	
Hardware Independence	
Software System Independence	
Interface Commonality	
Data Commonality	

B. Manageability (observable over time)	
B1. Availability	
Reliability (e.g. MTBF)	
Maintainability/Repairability (e.g. MTTR)	
Flexibility/Enhanceability	
Extensibility (New Functionality)	
Supportability	
Disposability	
B2. Operability	
Manageability	
Survivability	
Fault Tolerance	
Instrumentation	
Self-Repairing	
Recoverability	
Scalability	
Interoperability	
Component Interchangeability	
Portability	
B3. Cost to Live There	
Efficiency (Technology)	
Efficiency (People)	
Efficiency (Process)	
Efficiency (Cost)	
Efficiency (Time)	

PEOPLE FACTORS

Benefit to End Customers

1. New Product Options
2. Improved Service
3. Enhanced Customer Care
4. Improved Customer Intimacy
5. Number Impacted Positively

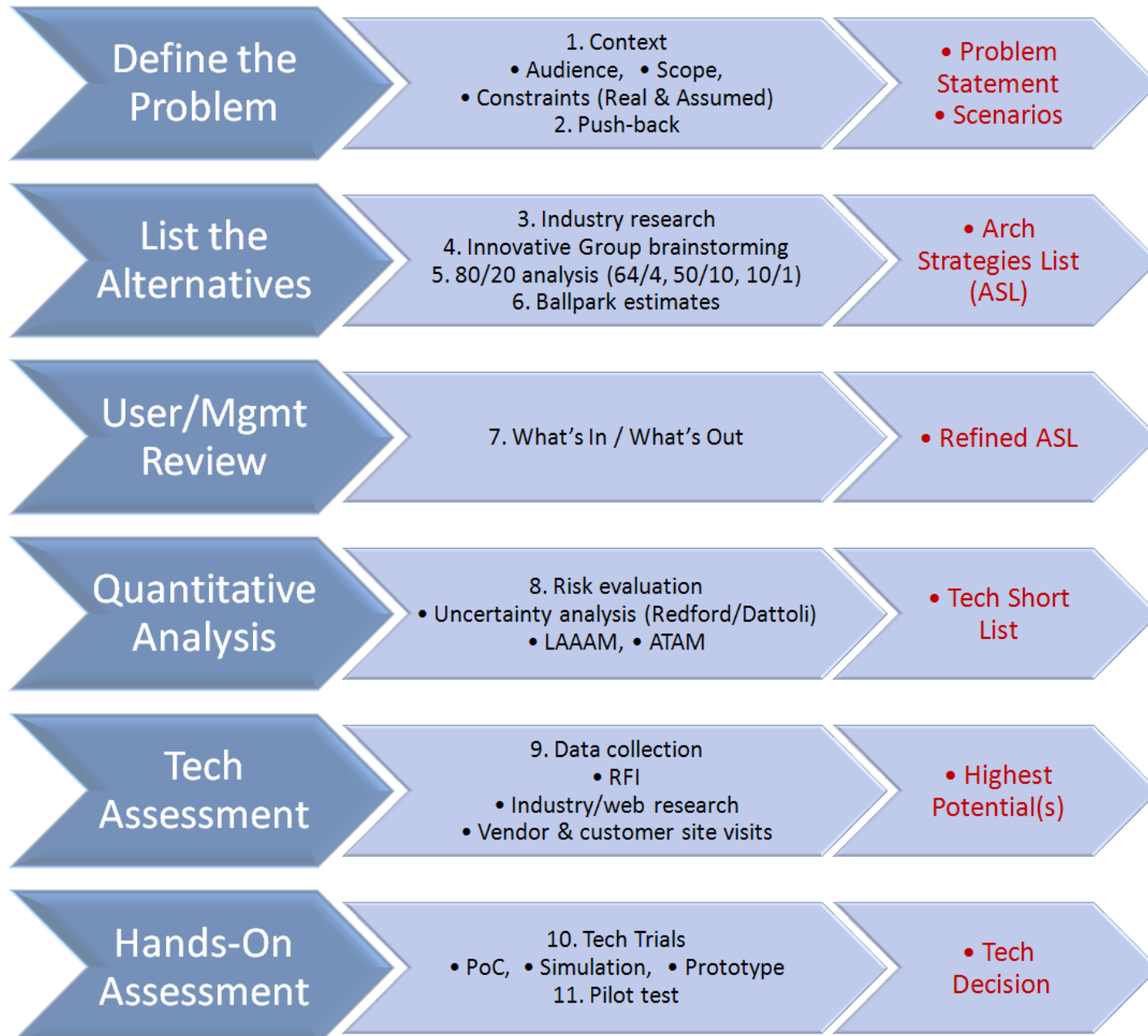
Benefit to USCC

1. Increased Market Share
2. Increased ARPU
3. New Job Aids/Tools
4. Enhanced Operating Efficiency
5. Decreased Cost per Gross Add
6. Reduced Tech Complexity
7. Enhanced Business Flexibility
8. Improved Speed to Market
9. Flipping the Diamonds in IS

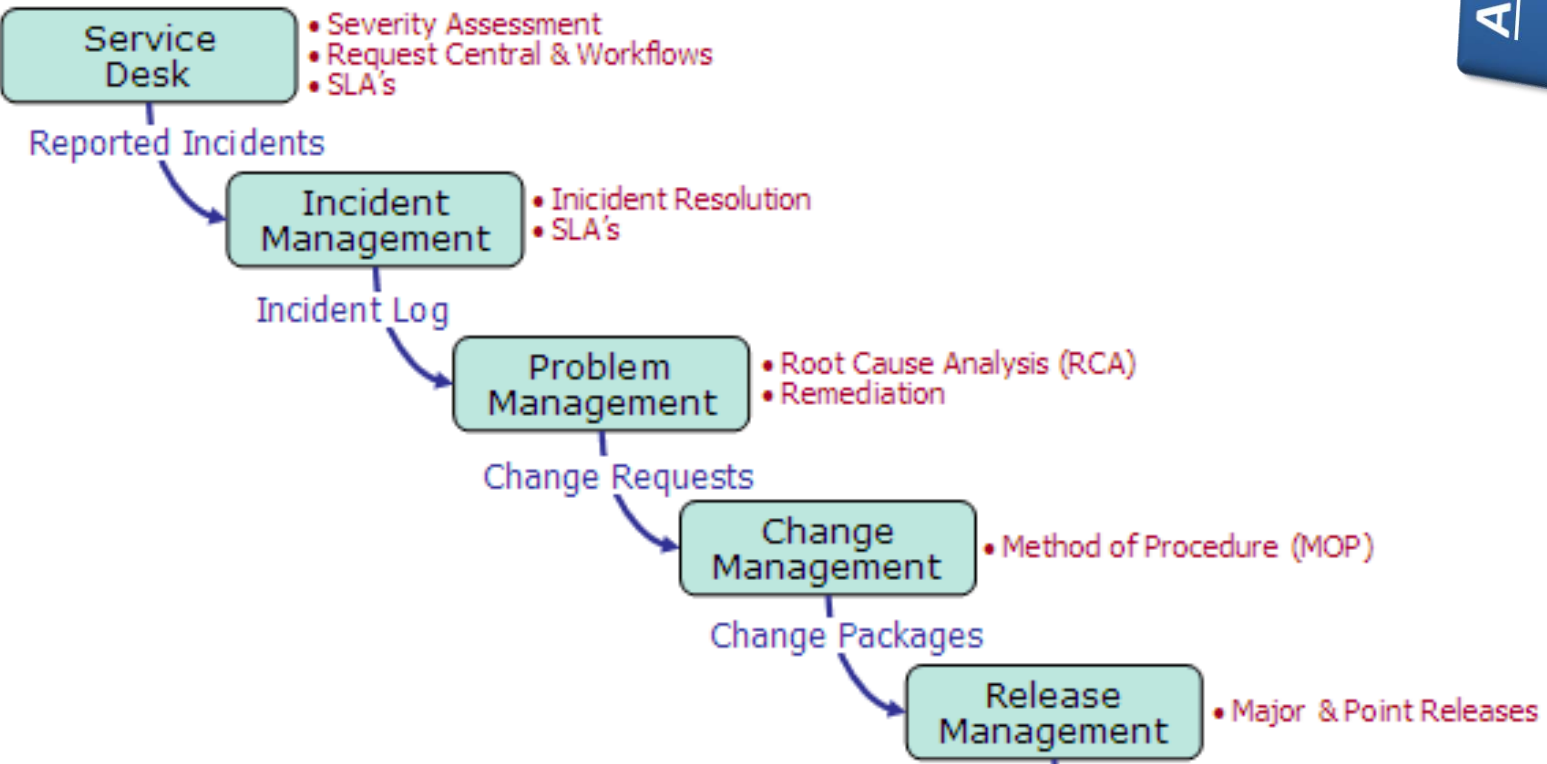
Disruption to USCC

1. Amount of Project Support Needed
2. Amount of Change to Assimilate
3. Change in Business Practices
4. Transition of Personnel
5. Political Upheaval

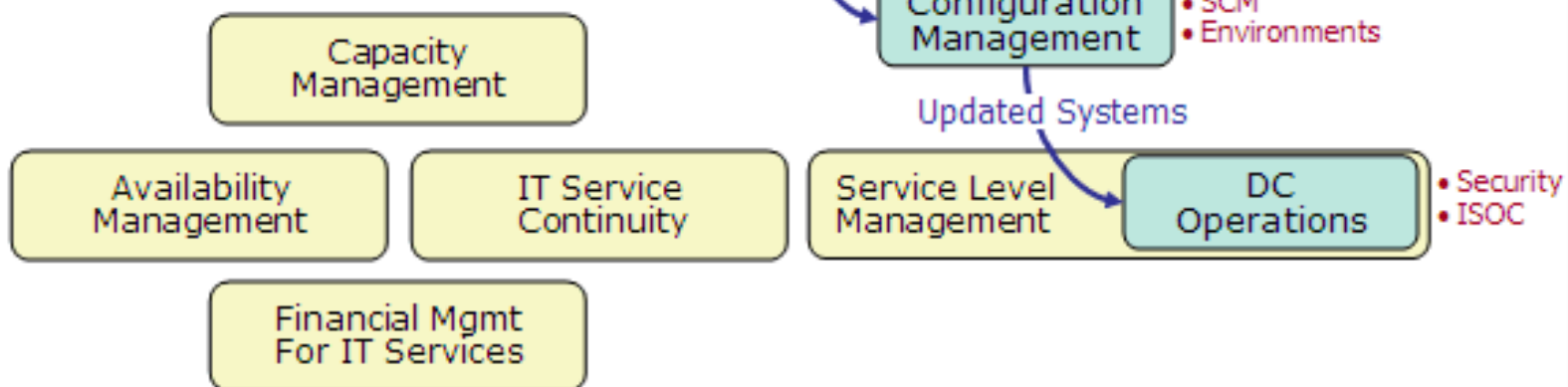
ABC IS Architecture Alternatives Model



Service Support



Service Delivery



Models

Models



IS ENTERPRISE ARCHITECTURE MODELS



NAVIGATION BAR

[Welcome](#)[What's New](#)[Terminology](#)

INFORMATION & REFERENCE

[Foglifter Diagrams](#)[Business Process Models](#)[CARES-Related Models ...](#)[Other Architecture Diagrams](#)[Contributed Diagrams](#)[Diagramming Tips](#)

OTHER

[Site Map](#)[About IS SA Modeling](#)[Source Docs for Copying/Editing](#)

IS Enterprise Architecture's Models & Diagrams

Thanks for visiting this site. Here you will find a collection of models and drawings that will help you understand the  business. In this site you'll find:

- [Foglifter Diagrams \(high level overviews\)](#)
- [Business Process Models, Flows and Descriptions](#)
- [Application Interfaces and Inventories](#)
- [Application-Enabling Equipment and Hardware Maps](#)

Please let us know if you have questions about this site, suggestions for improvement, or diagrams that you'd like to contribute.

Thanks for visiting!

Mark Dattoli

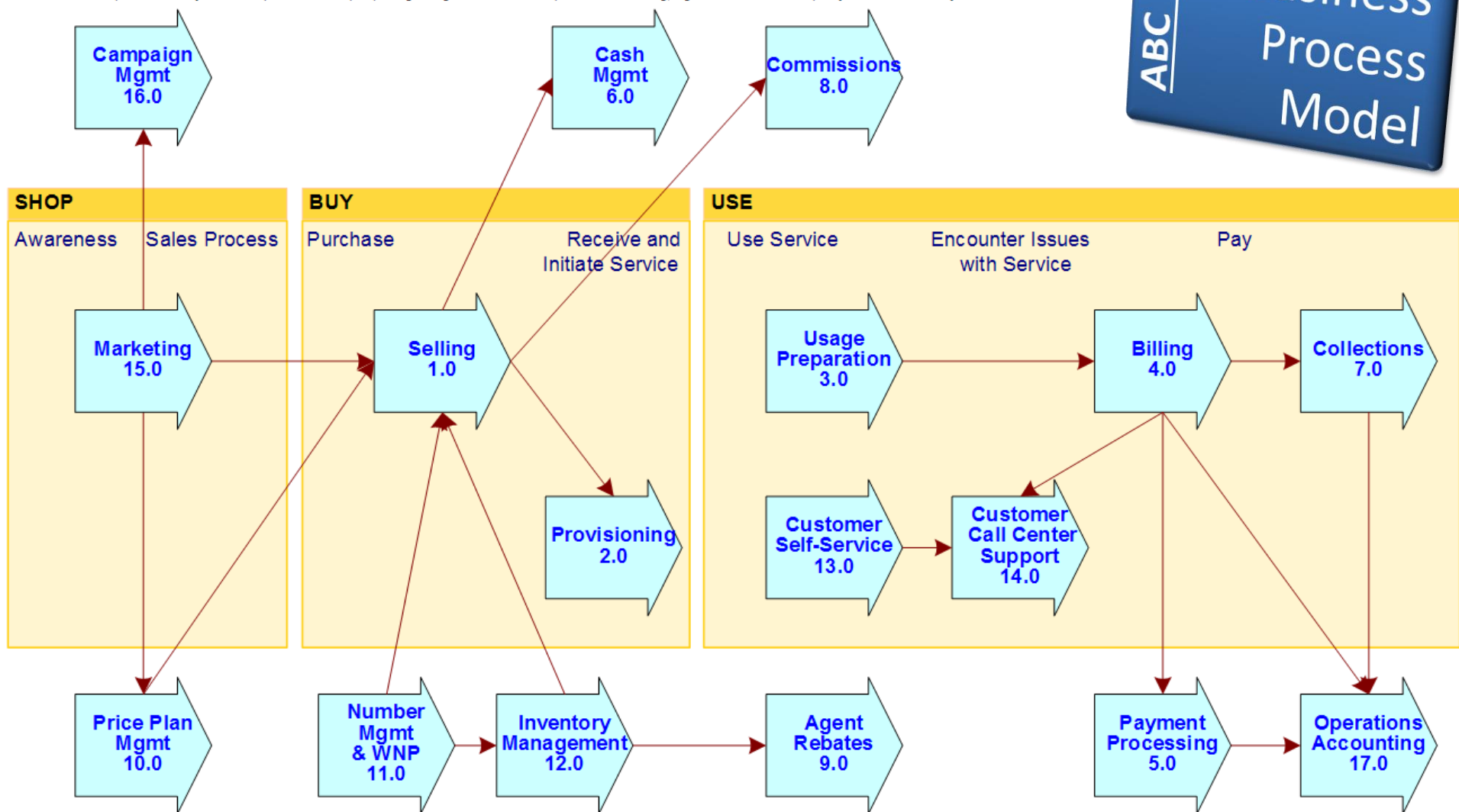
IS Strategy & Planning

e-mail: mark.dattoli@

phone: 773.864.3814



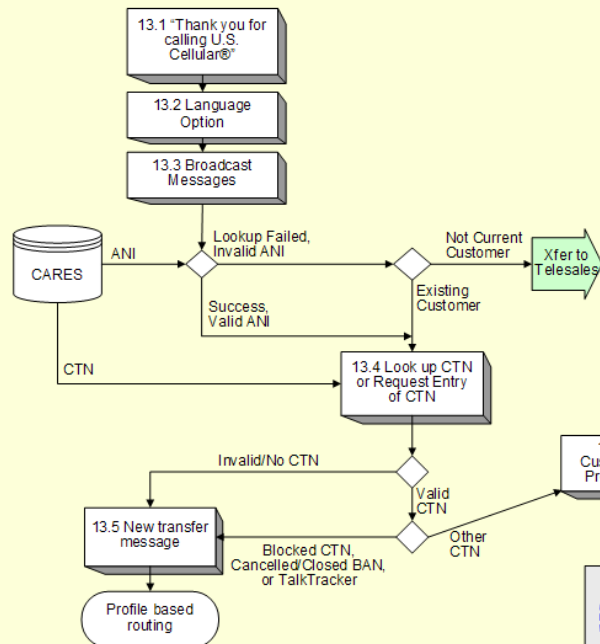
This Model Index depicts the 17 major business processes from prospecting through Collections and Operations Accounting, organized around the Shop-Buy-Use customer life cycle.



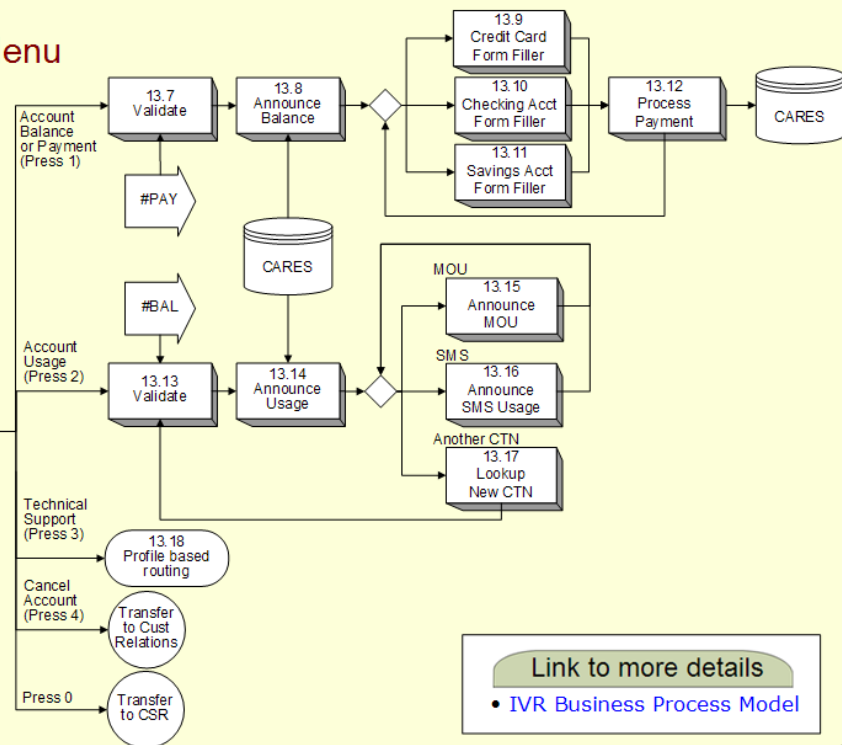
IVR software automates certain other functions such as customer verification and transfers others to a CSR in the Call Center. Support is also available through a number of public internet sites.

Interactive Voice Response (IVR)

Customer Verification



Main Menu

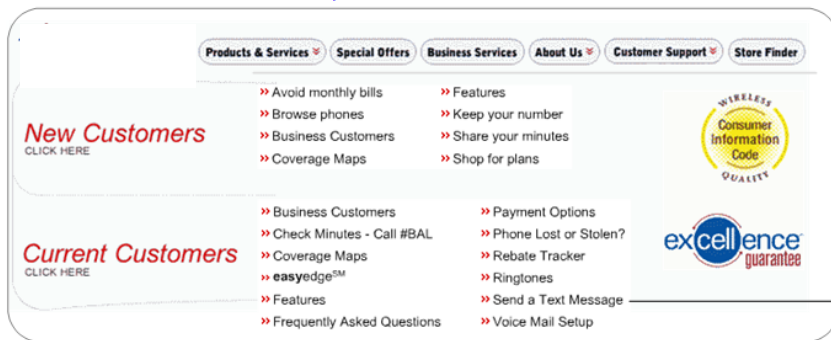


Link to more details

- [IVR Business Process Model](#)

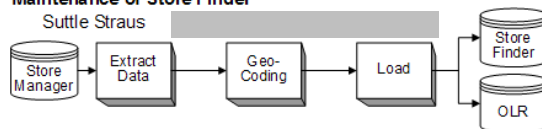
Internet

<http://www.uscc.com>



Maintenance of Store Finder

Stuttle Straus

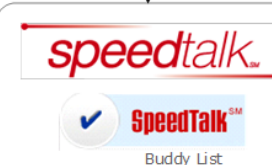


<http://www.uscellular-essentials.com>



TEXT MESSAGING

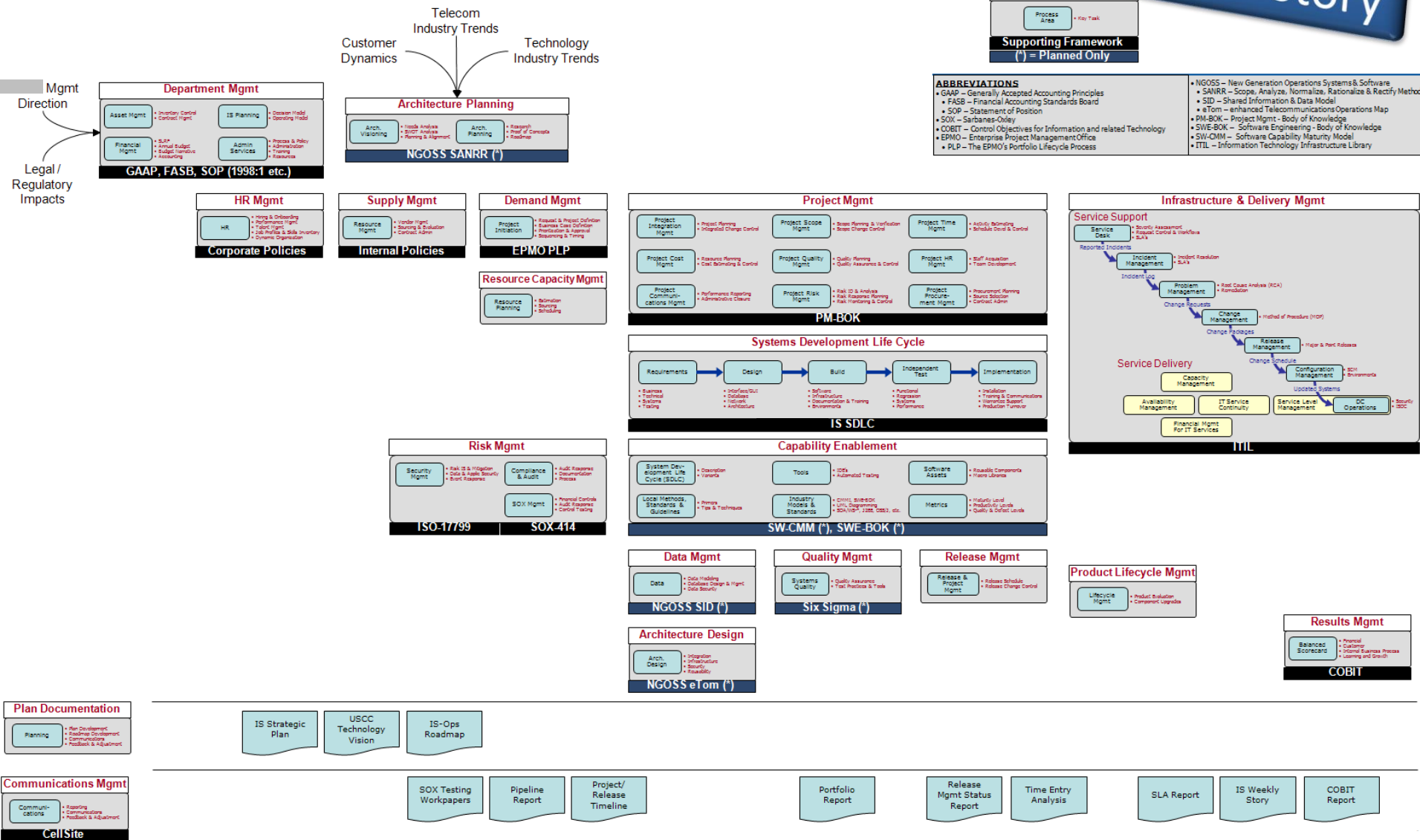
<http://easyedge.uscc.com>



<http://www.wirelessamberalerts.org>

IS Functional Story

THE IS DEPARTMENT FUNCTIONAL STORY



Audits





Strength		Comments	Weakness	
Inputs	♦ Project management	Projects kept small & consistently done per plan (this is outstanding compared to industry benchmarks) We take appropriate risks in project-related matters, e.g. InterTrans	♦ People management	people risks, etc.
	♦ Hard working & dedicated personnel	When needed, staff puts in long hours, works through weekends, etc.	♦ Recognition & reward systems	Limited management ability or encouragement to recognize outstanding performance
	♦ Good development tools	MS Office, Visual Studio, NT workstations, Endeavor, etc.	♦ Productivity is not measured or improving	Productivity is not achieved by osmosis; it must be engineered in
			♦ Tools training & support	Quality technical training available just-in-time in today's IT world requires more attention than we give it
			♦ Tools acquisition process	Need to finalize & agree to the (proposed) standard so point-solution tools do not become de facto IS standards
			♦ Excessive periods of time to implement upgrades	I had to support staff using Word 6.0 for over 2 years after I got Word 97
			♦ Tools sunset process	Pulling the plug sometimes done without valid cost/benefit analysis
Processes	♦ Good strategic direction	Assisting AVL in defining its business values, its network roles, and web enabling AVL systems are major contributions	♦ Implementation of vision	No one appears responsible to monitor the progress toward the goals we've set, e.g. CBD skills
			♦ Personnel factors appear under-addressed	Where are the plans for re-tooling, and what will we do with those who cannot learn new skills? What's our overall philosophy?
			♦ Communication of vision & its implications to IS staff	Suggest a regular agenda item at IS meetings be an update on this
			♦ Lack of actionable plan, with visible progress charts	Need more visionary leadership on an ongoing basis, for people issues as well as technical
			♦ Capacity planning	Peoplesoft database decision; Supra/DB2 backout
			♦ IS security & disaster recovery plans	A number of gaps were identified in a 1996 study
	♦ PMO & Business Analyst Role	Strengthens user/IS ties	♦ Agreement on user R&R	Should be addressed soon
	♦ Appropriate use of promotion from within		♦ Limited promotion opportunities	We're a small shop; let's proactively address how we can ameliorate the downsides of this

Processes (continued)	♦ A visible commitment to QA & Standards		♦ Improvement of software engineering and tools slighted	Progress in this area is too slow, especially in regard to OO/CBD
			♦ Need stronger commitment to quality by managers	Managers need to take ownership of standards enforcement
			♦ Insufficient attention on organizational development	Suggest key personnel work through the OD binder I've drafted
	♦ Teamwork	Has improved some (but gains have plateaued)	♦ Teamwork	Can improve yet, especially as it relates to internal support groups
	♦ Communication	Project boards, staff meetings, Outlook email, PMO status report are items that are helping	♦ Communication	Need a standard IS group distribution list maintained on Outlook; project boards for all areas; PMO & other director's reports posted or made available

Outputs	♦ Quality of delivered systems	Generally low failure & defect rates	♦ Availability of user-oriented systems overviews	We need to step up to the plate & create easy-to-access-and-use systems documentation for users
			♦ Quality of systems documentation	We need better documentation tools, and a long-term commitment to maintaining documentation
			♦ Help Desk documentation	We need to develop doc to standardize responses to help desk calls; Also a FAQ facility to let users look up their own answers
			♦ Little peer-review and cross-training	Instituting walkthroughs is a "low-hanging fruit" option
			♦ Testing process	Needs to be re-engineered
			♦ Need a formal defect analysis process	We don't know which processes to improve if we don't know where & how bugs originate
	♦ New network systems; proactive technology solutions	IS is gaining a new level of confidence from the agents	♦ Responsibility for innovation in system processes	No one seems to be given time & responsibility to sit back and think of creative process changes
			♦ Little formal research of enabling technologies	No one seems to have much time for monitoring the industry for promising new technology
	♦ Bragging rights	"Family"-feel; casual dress; etc.	♦ IS bragging rights	Do have reference library & skills database (in SD), but less so for new technology, training, opportunities, etc.
	♦ Generally low turnover	Proves we're doing more good than bad; Krohn's longevity brings a much-needed stability		