

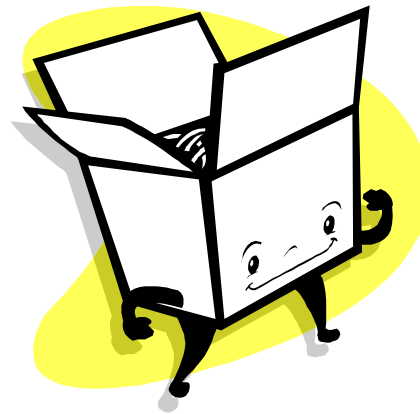
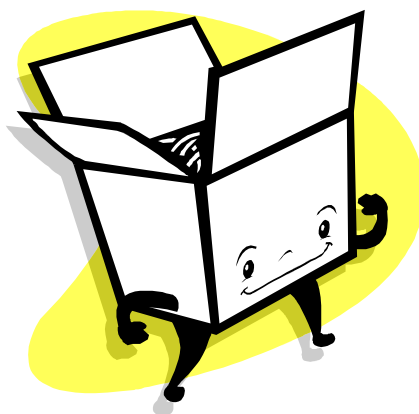
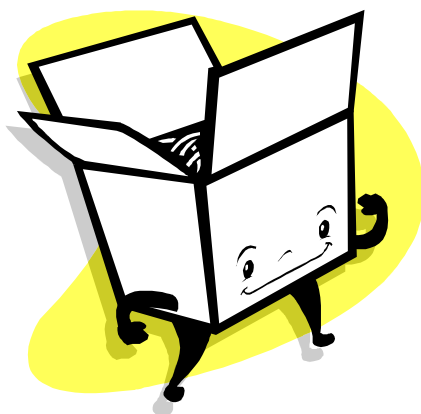
# *Service Transition Planning & Support* *A Practical Perspective*

**Michelle Pearce**



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# Takeaways





# A practical perspective

- So what's our problem?
- What are we doing about it?
- How's it going so far?
- What's next and why?
- Questions?

# Pop Quiz – what's your status?



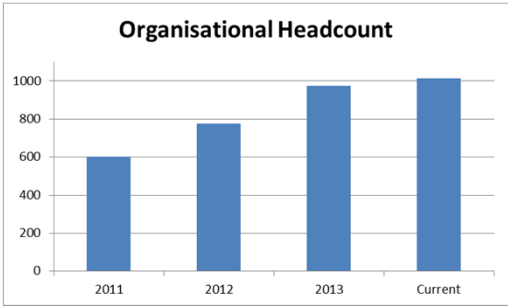
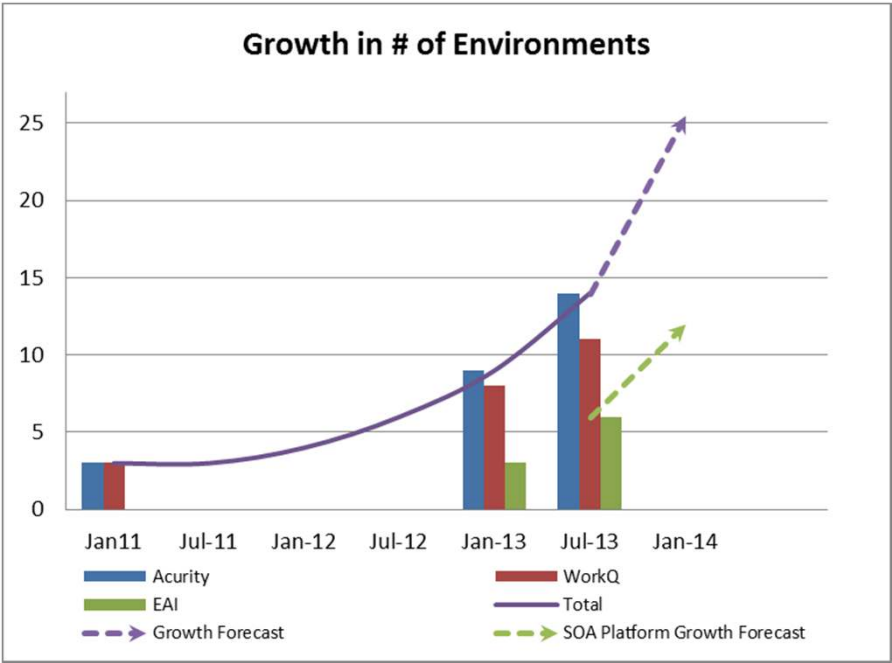
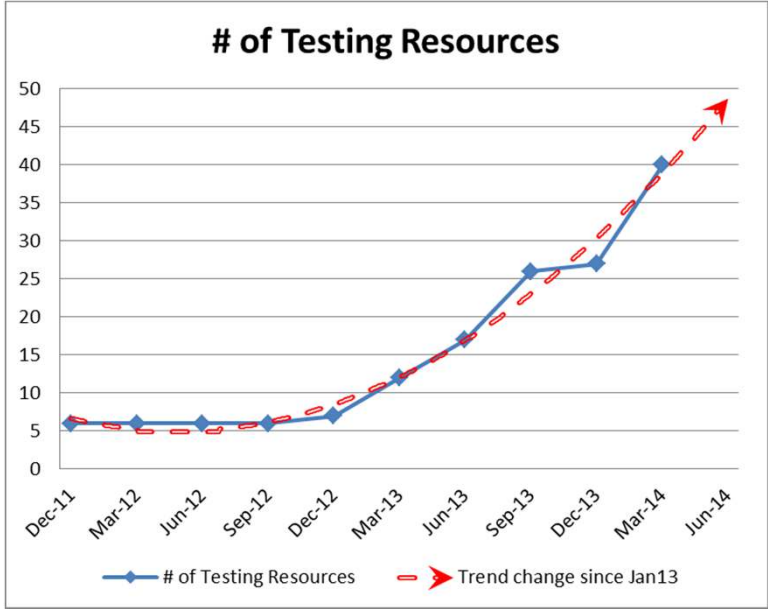
# So what's our problem?





# So what's our problem?

What does business growth look like for us?





So what's our problem?

More of  
Everything - now!

#LEADit *itsMF*

# What are we doing about it?

## How did we approach the problem?

### Service Transition capability

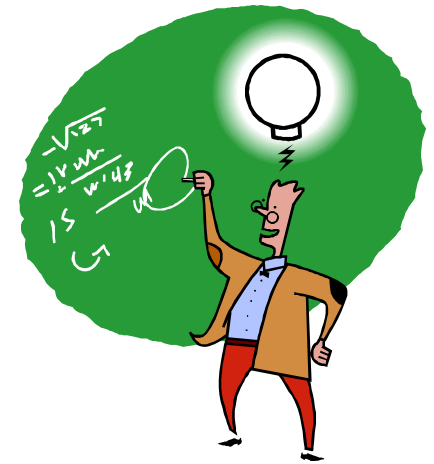
- Work out what we **DO** look like **NOW**
- Work out what we **WANT** to look like in the **FUTURE**

### Benchmark using CMM

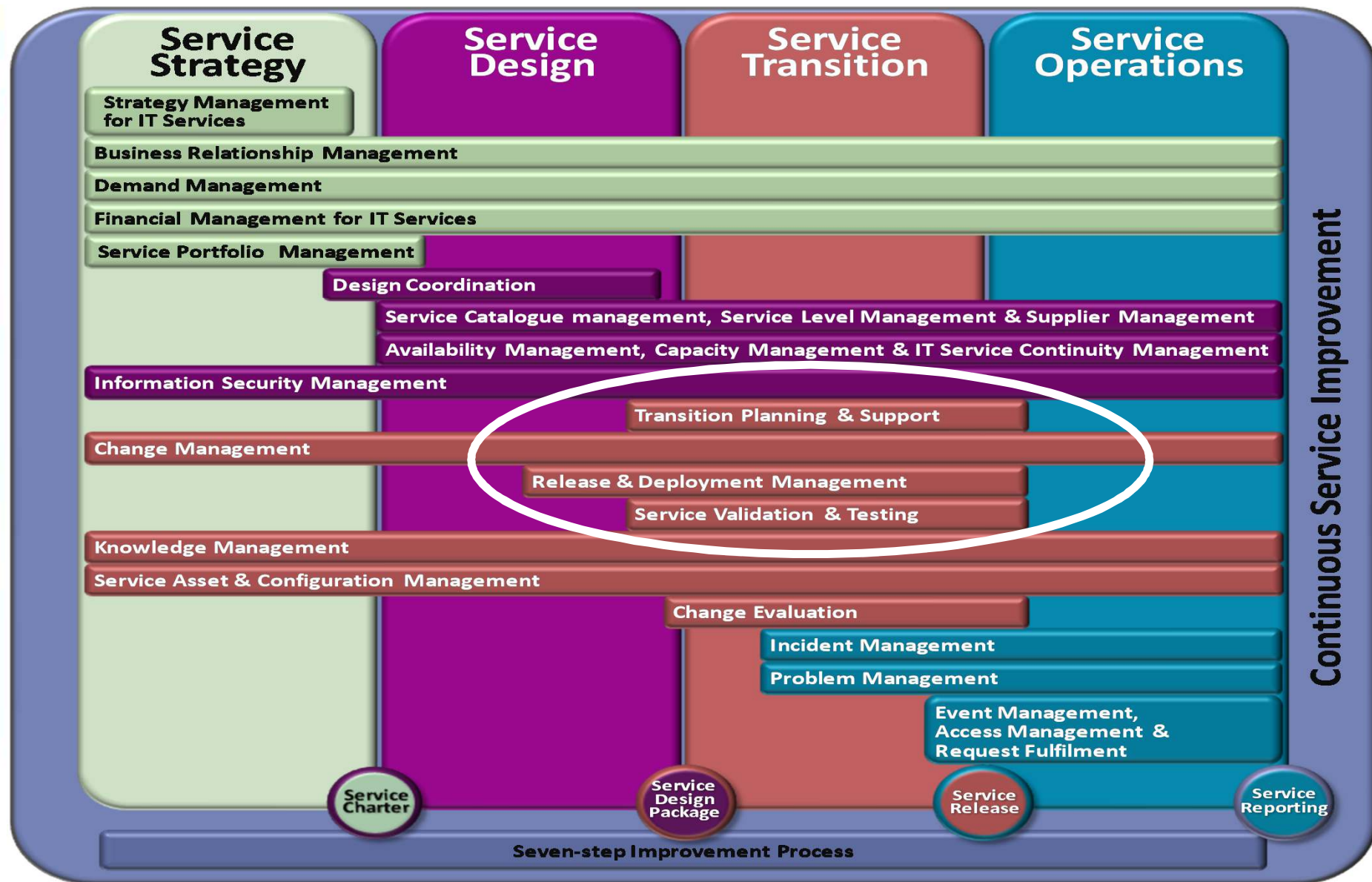
- Current rating
- Establish a goal rating

Gap analysis to identify what we need to do to reach our goal

Create the plan!









# What do we think we look like now?

## **Release and Deployment/Service Validation and Testing**

**Objective** : To plan, schedule and control the build, test and deployment of releases, and to deliver new functionality required by the business while protecting the integrity of existing QSuper services

**Goal** : To ensure that new or changed services are:

**FIT FOR PURPOSE**

**FIT FOR USE**



#LEADit itSMF



# What do we think we look like now?

## Service Transition Planning & Support (STP&S)

**Objective :** To successfully establish the resources and processes needed to transition a new or changed service into production, and support it once it's there.

**Goal :** to ensure that new /changed services are

**SUPPORTABLE**

**SUSTAINABLE**

# What do we want to look like in the future?

Project Management Lifecycle to deliver

- Service Strategy
- Service Design
- Service Transition

Service Transition Process to deliver a service that is

- Fit for purpose and fit for use upon deployment
- Supportable and sustainable in operation

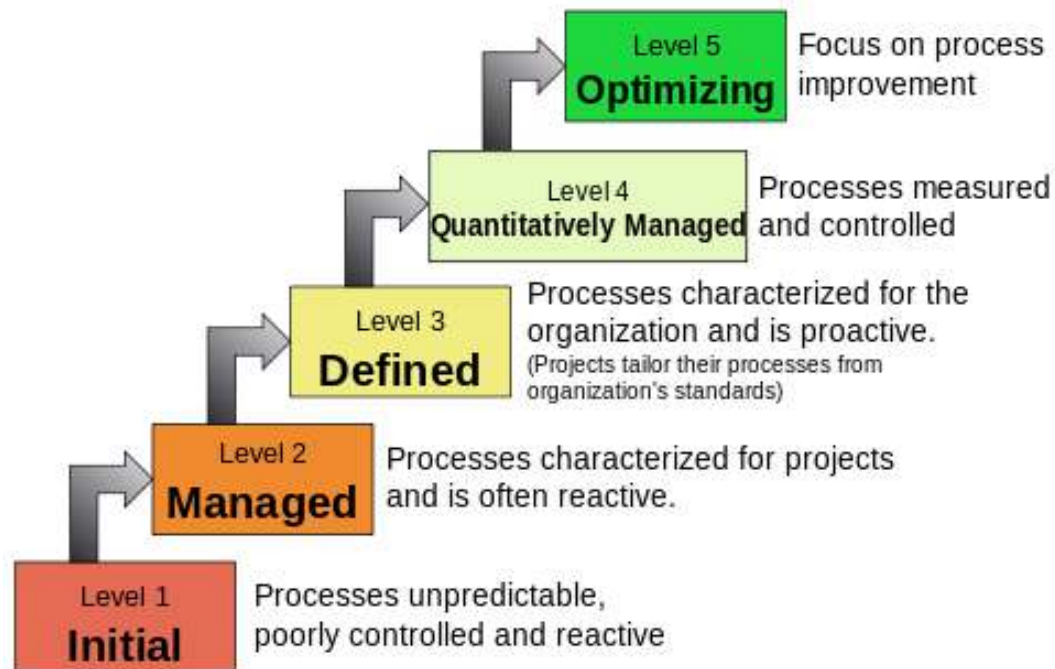
**Project Management Lifecycle**  
**Prince2**

**Service Operations Lifecycle**  
**ITIL**



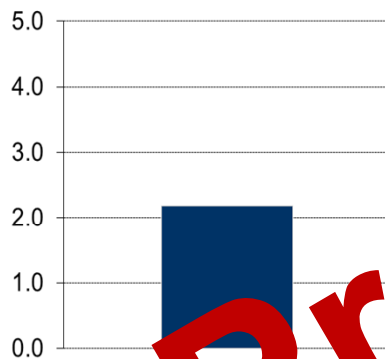
# Benchmarking our current service

## Characteristics of the Maturity levels

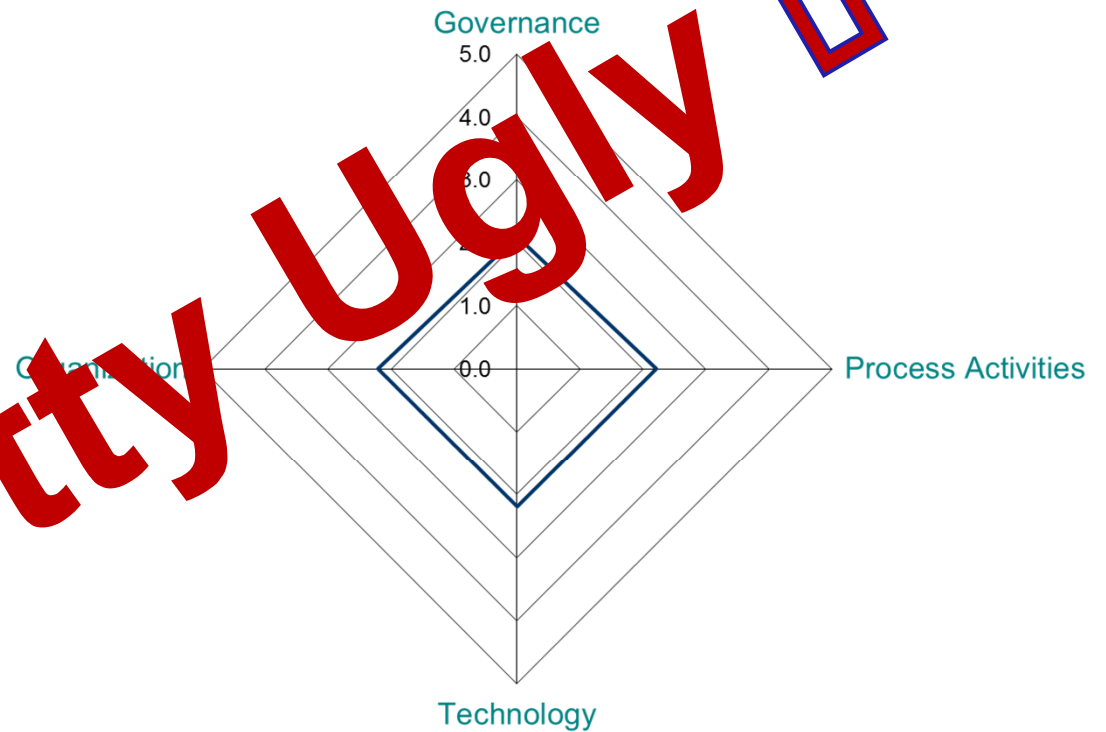


# So how ugly is our baby?

Overall Maturity Rating



Area Rating - Radar

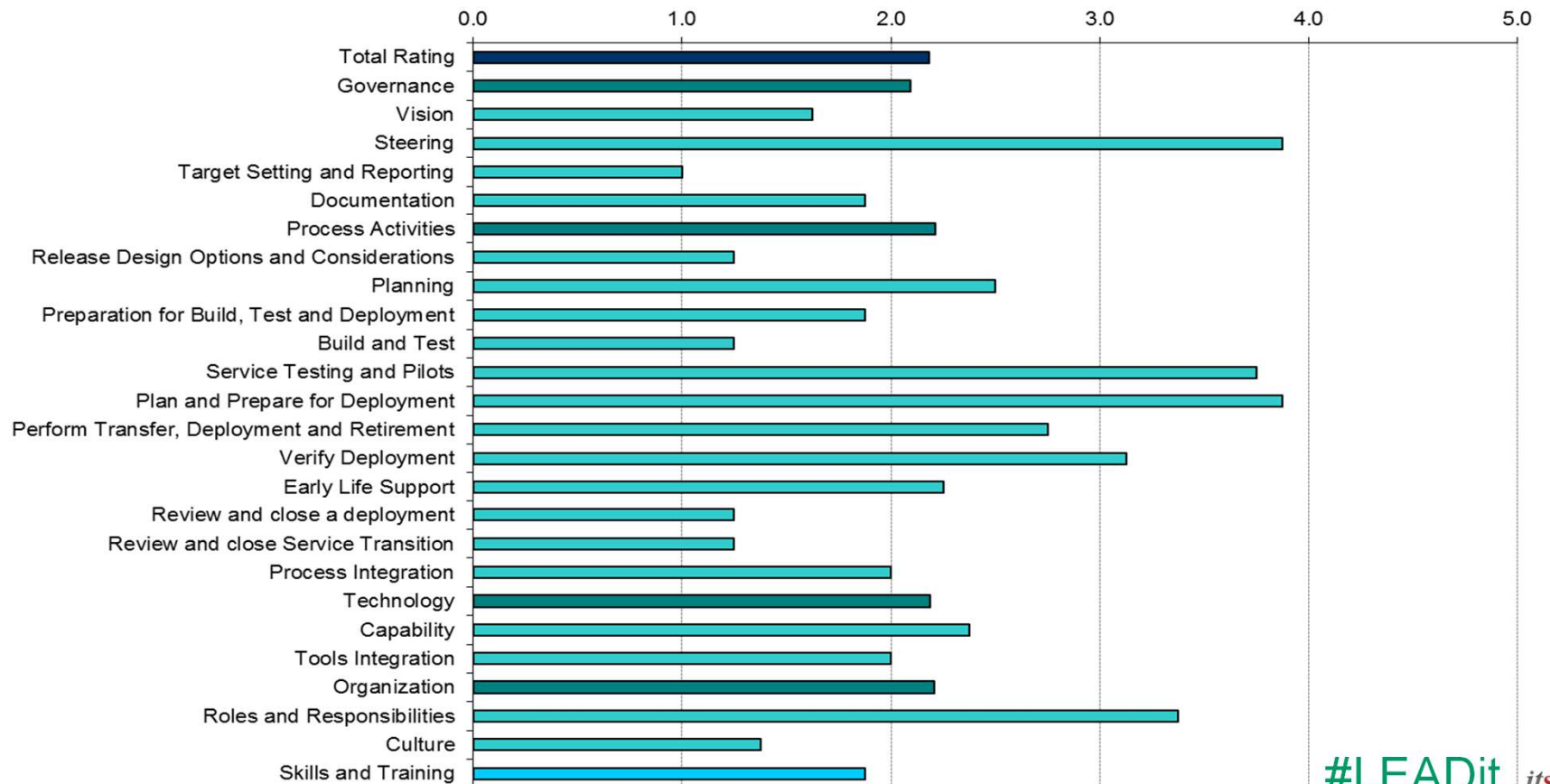


Pretty Ugly



...but getting prettier

## Sub-Area Rating - Bars





# Create your Continuous Improvement Plan

- Establish your **goal** CMM rating
- Prioritise the areas you will focus on to improve it
  - Risk based
  - Best bang-for-buck
  - Financially viable
  - SMART
- Write it down and report against it!





# What was our goal?

What was our goal?

- An uplift in our CMM from 2.2 to 2.5 by EOFY

What did we choose to focus on to get there?

- Organisational maturity – it's people who do the work! Get that right and nearly everything else follows
- Continue developing our strong Testing Management practices and operating model
- Strengthen our Release & Deployment practices, especially with regard to environment management. Put a focus on documentation and reporting
- Introducing a formal Service Transition Planning & Support process

# Ask the hard questions - people

## Get your house in order first

- Do you have the right people doing the right job?
- Do they have the right skills and experience?
- Do they have the right technology to support them?
- Is your operating model and team structure right for how you need to operate?
- Do you know what frameworks or methodologies you need to apply to the different tasks?
- Are your recruitment practices getting in the way of your success?





## Some of the answers - people



We have :

- Expanded the scope of our business functions
- Made changes to position descriptions
- Establish some new roles, and gotten rid of others
- Changed our recruitment practices
- Introduced changes to our operating model and team structure(s)
- Decided what frameworks apply to different role functions



# Ask the hard questions - process

We implemented STP&S, and had to decide:

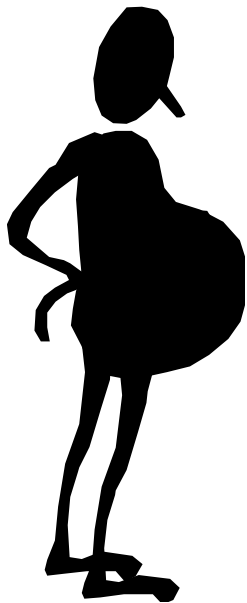
- **The Scope** of STP&S (ie when do we and don't we require STP&S plans)
- **What** to include in our STP&S Plans
- **How** we want the process to work to ensure a good marriage between our
  - Project management methodology
  - Development methodology;
  - Testing methodology; and
  - IT service management methodology
- **When** to influence projects

**.....and the answers were.....**

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# The scope of STP&S



All new or changed  
technology services

# Pop Quiz – what should be included?



SERVICE TRANSITION PLAN TO INCLUDE:		Artefacts for Release Readiness Report
Service Strategy Package Financial Management; Demand Management	Financial management	Ongoing service costs - current financial year, future years
	Demand management - FTE to support	Org change assessment and status update (if changes to FTE are required)
	Service level agreement/Service Catalogue	ISA and SC created/updated
	IT Service Continuity Management	
	Disaster recovery plan	DR plan, BC plan created/updated;
	DR plan execution	CR# and confirmation of successful execution of DR solution
	Backup and Archiving requirements	Backup and Archiving signoff
	Security assessment	Risk and Security signoff
	Design documents (high level and detailed designs)	
	high level design	High level design
	detailed design	Detailed design
	EAI - Info Model, Service contract - detailed design	EAI - Info Model, Detailed design, and Service contracts repository updated
	Build requirements	Build documents plus confirmation of automated scripts for builds
	Decommissioning requirements	Decommissioning Completion Report
	Vendor support	Back to back contract with vendor
Service Transition Package Transition planning and support; change mgmt; Service Asset and config mgmt; Release and deployment mgmt; Service validation and testing; knowledge management	Licensing requirements	Licensing signoff
	Release/implementation plan	I&T Release/deployment plan signoff
	Test Approach and Test Strategy	Testing package (test strategy, master test plan)
	Test sub-plan requirements (eg unit, system, SIT, SOA/EAI, interoperability, accessibility, load, performance, security/penetration, UAT etc)	Testing package (sub-test plans) and Certificate(s) of Acceptance
	Knowledge transfer - IT Support Plan	Knowledge transfer - IT Support Plan
Service Operations Package Event, incident, access and problem mgmt; request fulfilment; service desk	Knowledge transfer - Staff training, education	Knowledge transfer completion signoff
	Event management	Monitoring signoff
	Problem management	Problem management signoff
	Service Handover requirements	Service handover signoff
		Incident workflows
		Support arrangements
		Service desk setup - IQ, FAQs
		Standard operating procedures
		Service desk setup complete signoff

# Remember what we said....?

Project Management Lifecycle to deliver

- Service Strategy
- Service Design
- Service Transition

Service Transition Process to deliver a service that is

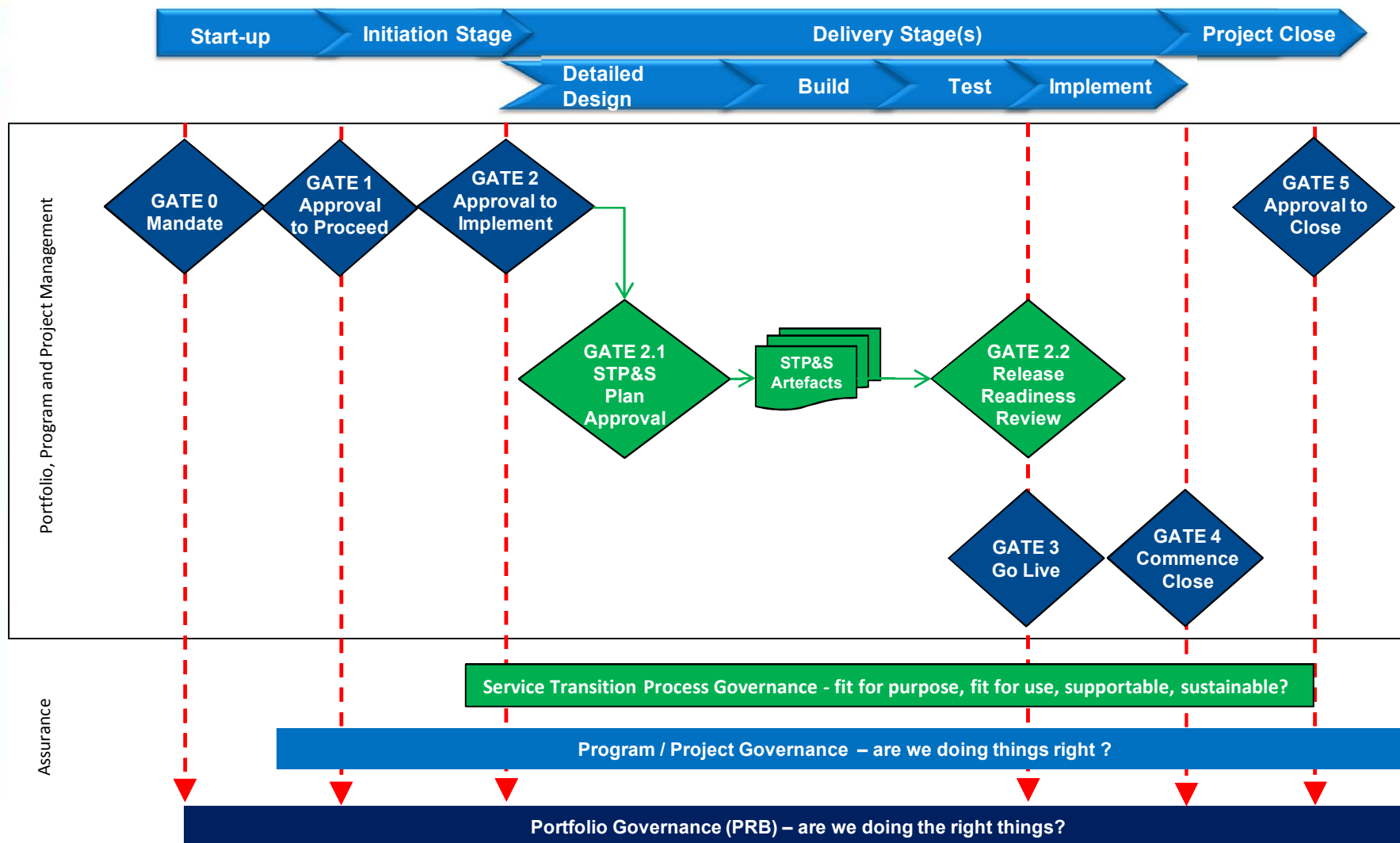
- Fit for purpose and fit for use upon deployment
- Supportable and sustainable in operation

**Project Management Lifecycle**  
**Prince2**

**Service Operations Lifecycle**  
**ITIL**







Items that are green are newly introduced process and supporting artefacts



## ....and help people to get it right

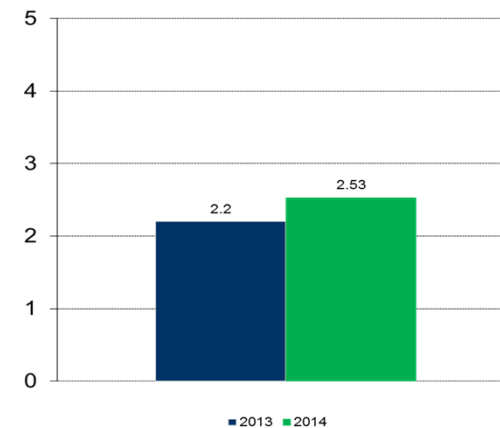
- Create/use templates for the various artefacts (to be owned and maintained by the relevant ITIL process owner)
- RASCI - Ensure you get the roles & responsibilities right. Not everyone is an approver even though lots of people will think they should be!
- Make sure you have an education / training program for your process
  - For the initial launch
  - For ongoing refreshers and new inductions



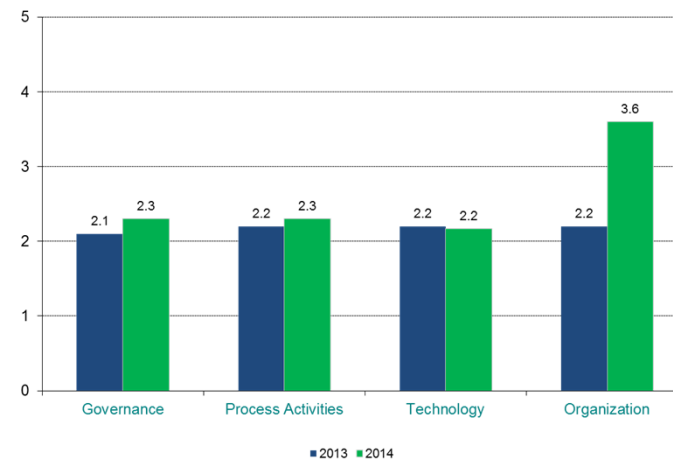
# How's it going so far?

- ✓ Successful implementation of Service Transition Planning & Support process
- ✓ An increase in the mid-year reassessment of our CMM rating
- ✓ Our revolutionary improvement plan has morphed into our continuous improvement program. It's now a line item on our annual business plan

Overall Maturity Rating



Area Rating - Bars

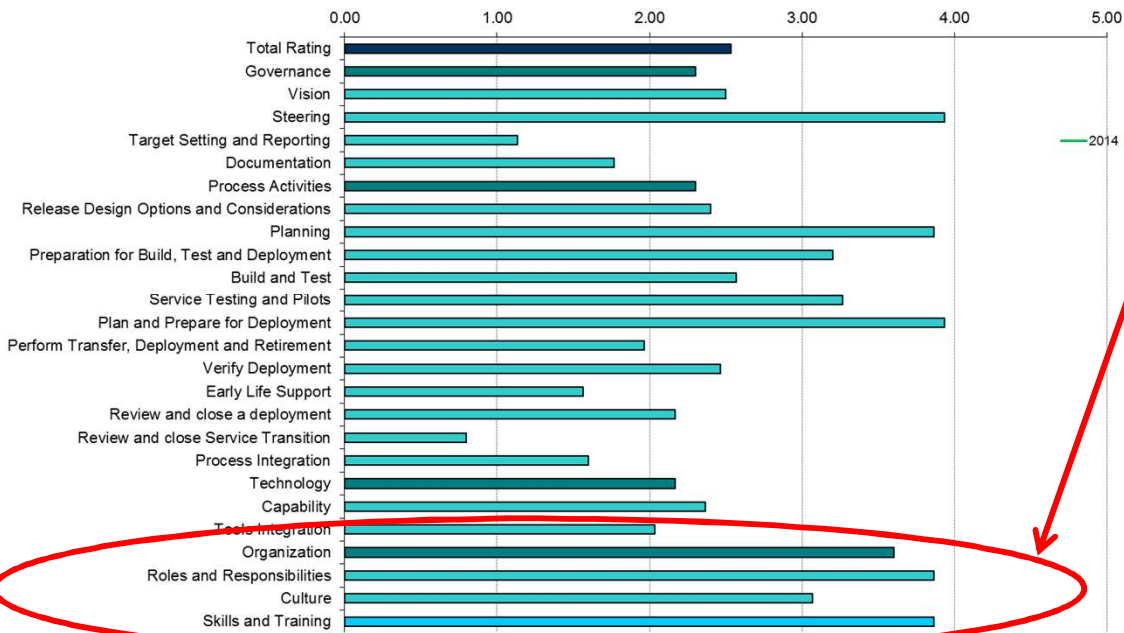




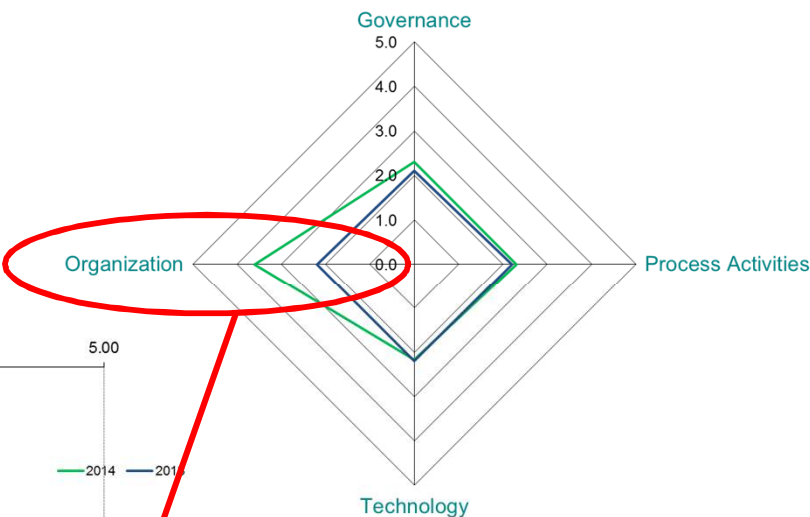
# How's it going so far?

*The devil is in the detail....*

Sub-Area Rating - Bars

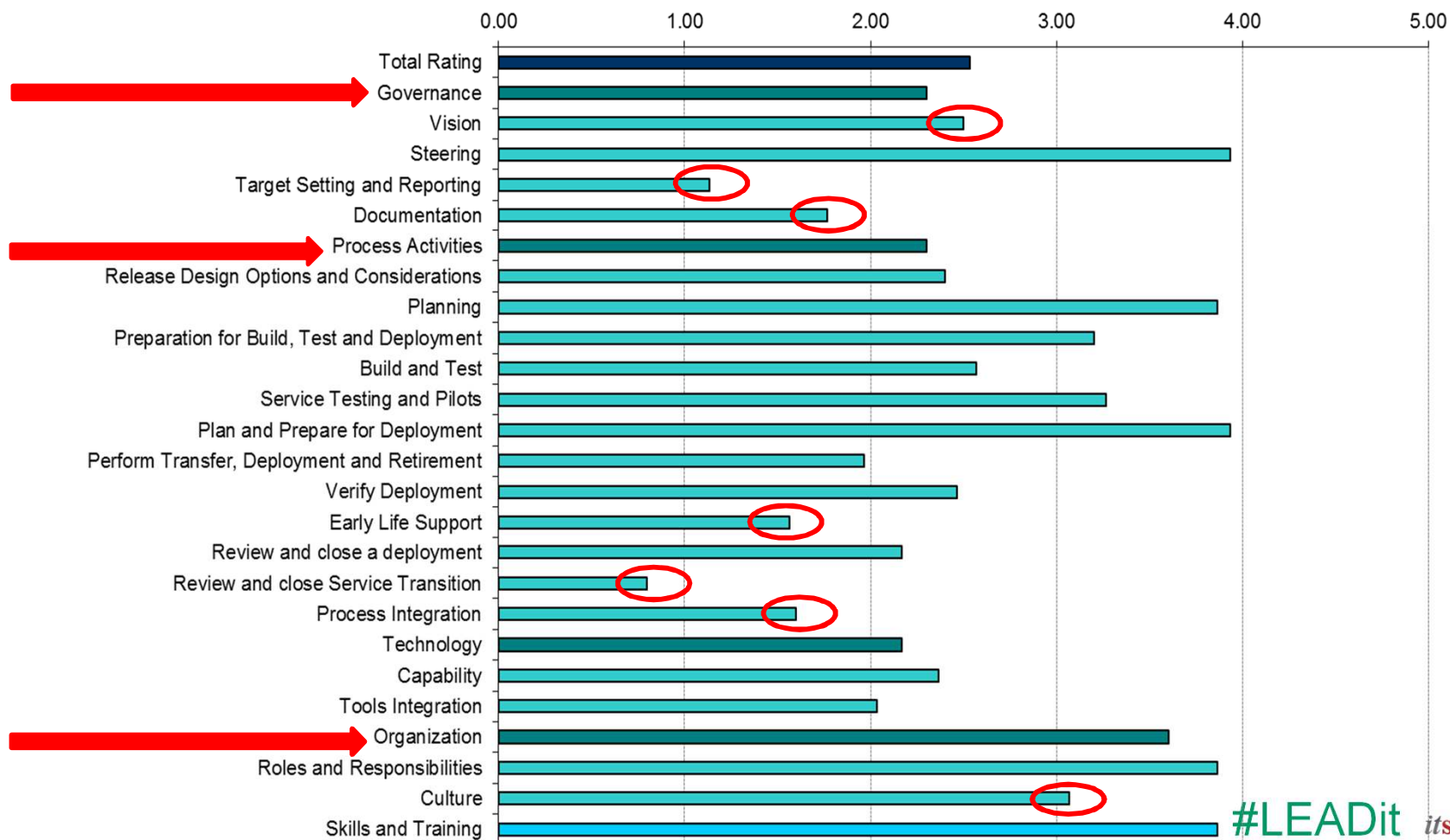


Area Rating - Radar



# What's next?

## Sub-Area Rating - Bars





Getting away from the boring stuff....

**What does this mean  
for our  
staff and members?**



# Key takeaways

- Engage your key stakeholders early and often
- Ask yourself if you really need a formal process, or is what you've got good enough?
- If you get the organisational elements right, the rest is a whole lot easier to implement
- Use the 4-Ps (people, process, product, partners) to your advantage. It also makes it easier to focus on what your priorities should be



# Recommendations

Activity	Key to success
Benchmark your current capabilities	Do it before you begin and at regular intervals thereafter
Establish your goal capabilities	Be realistic. Chances are you'll be doing it with little money, no extra resources and a timeline to meet. Under-promise and over-deliver (rather than the other way around)
Ask the hard questions about your people, process, technology	How ugly is my baby? Be brutally honest. It makes it easier to show positive results when you start changing things!
Create your Continuous Improvement Plan	Document it and report against it. Link it to your corporate Strategy. Link it to your IT Strategy. Link it to you and your staffs' performance reviews. Link it to your Risk and Issues Registers. These things will show you are serious, and will also give weight to the requirement to achieve your outcomes if things get a bit tough
Take a risk-based approach	Get the important stuff right first. Once you have the runs on the board, you can mature the process with incremental changes
Work out how far back in the food chain you can influence a project	The earlier the better. Use your key stakeholders and networks to bring the philosophy of 'for the corporate good' to your projects (not just successful project deployment = successful project).
Establish an education/training program	For the launch, as well as ongoing refreshers and induction of new staff. You want to set people up for success, so they have to know about what the 'right way' looks like.





# Additional Resources

Formal frameworks, methodologies, standards:

- ITIL (IT Service Management)
- Prince2 (Project Management)
- ISTQB (Testing)
- SDLC Frameworks (eg Agile, Waterfall etc)
- Your corporate standards and policies for risk, IT, HR etc
- Your HR recruitment policy and practices

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