

Process Deployment and Monitoring



SEIPartner



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Purpose

This presentation proposes an approach for supporting successful deployment and monitoring of process improvements.

Where in the life cycle are we?



IDEAL (SM) Model

A closer look at OPF SG 3

Organizational Process Focus (OPF) Specific Goal 3 (SG3) Deploy Organizational Process Assets and Incorporate Lessons Learned

- ❑ The organizational process assets are deployed across the organization and process-related experiences are incorporated into the organizational process assets.

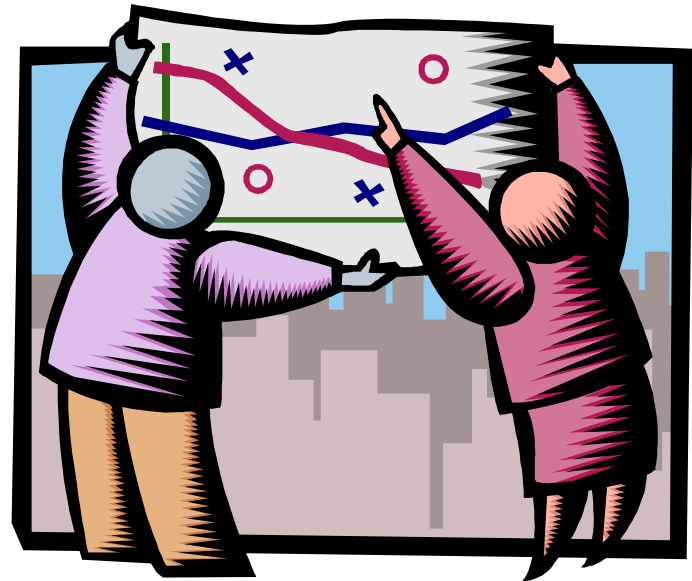
What does "Deployed" mean in your organization?

What does this mean?₁

OPF SP 3.1 Deploy Organizational Process Assets

- Deploy organizational process assets across the organization.

OPF SP 3.1 is about identifying the strategy (and the necessary support resources) for deploying new and changed assets to the entire organization.



What does this mean?₂

OPF SP 3.2 Deploy Standard Processes

- Deploy the organization's set of standard processes to projects at their startup and deploy changes to them as appropriate throughout the life of each project

OPF SP3.2 is about helping individual projects adopt and tailor current organizational processes



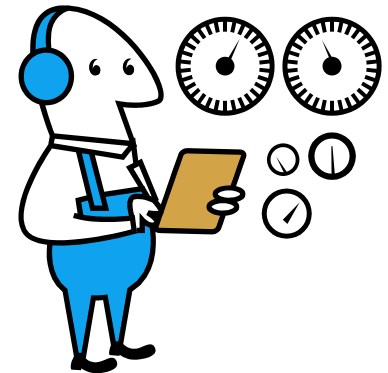
What does this mean?₃

OPF SP 3.3 Monitor Implementation

- Monitor the implementation of the organization's set of standard processes and use of process assets on all projects.



If you don't have a plan, what are you monitoring against?



What does this mean?₄

OPF SP 3.4 Incorporate Process-Related Experiences into the Organizational Process Assets

- Incorporate process-related work products, measures, and improvement information derived from planning and performing the process into the organizational process assets.

This includes capturing experiences related to deploying processes!

Who is responsible for process adoption?

Process deployment and monitoring is an organizational activity:

- ❑ Projects are responsible for using current processes, but the process focus group is responsible for making sure projects can succeed in this endeavor
- ❑ Monitoring of process deployment needs to occur at an organizational level, projects have lots of other things to worry about



Common Deployment Pitfalls

- ❑ Assuming training ensures adoption
- ❑ Interacting only with “process-friendly” people when deploying
- ❑ Discouraging feedback during deployment
- ❑ Assuming that no feedback = adoption
- ❑ Mandating immediate adoption of process changes (without consideration to rework or other project impacts)
- ❑ Assuming when people don't perform the process, they are wrong and the process definition is right
- ❑ Assuming a deployment plan is not necessary

So how do I avoid the pitfalls?

Avoiding the Pitfalls

- ❑ Evaluate which projects should adopt the change and when
- ❑ Evaluate how difficult deploying the change will be
- ❑ Develop a strategic deployment plan conveying in a few bullets how the deployment will be accomplished
- ❑ Develop a detailed tactical plan for ensuring all projects that should adopt the change actually do
- ❑ Monitor the deployment until adoption is achieved

Which projects should adopt the change and when?

There are several considerations:

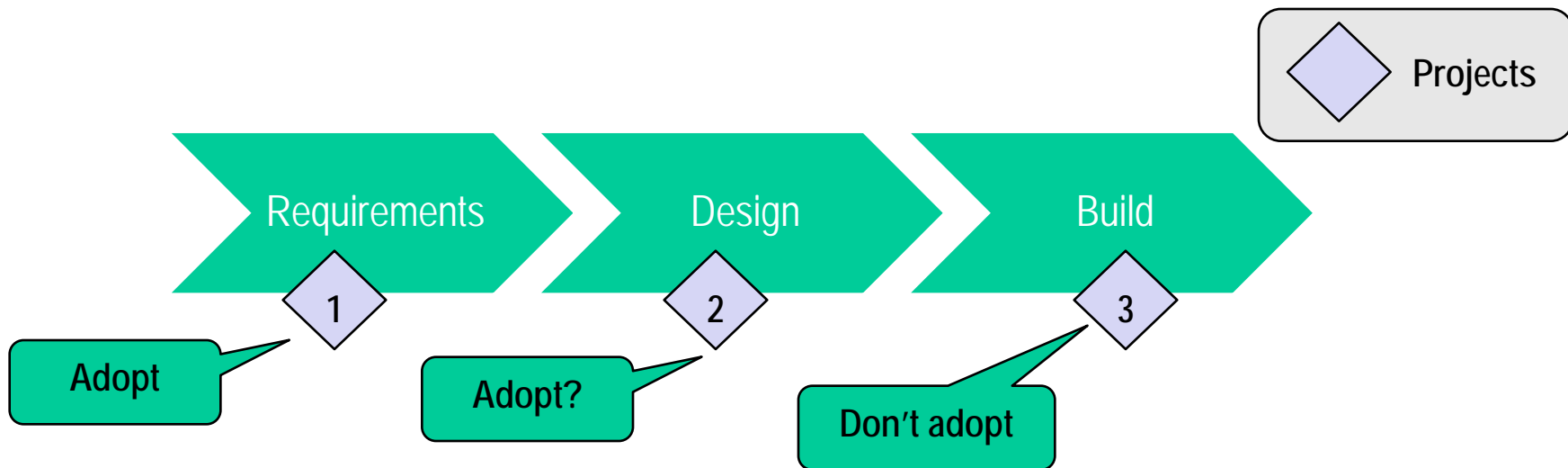
- ❑ Minimizing impact to active projects
- ❑ Urgency of adoption of this process change
- ❑ Minimizing length of process deployment and monitoring
- ❑ Minimizing different process versions in use at one time

There are also several options:

- ❑ All projects adopt immediately
- ❑ All new projects adopt at start-up
- ❑ All projects that have not yet reached a certain life cycle phase
- ❑ All projects for a particular customer or product
- ❑ All projects using a certain life cycle

Process Adoption Considerations- Example #1

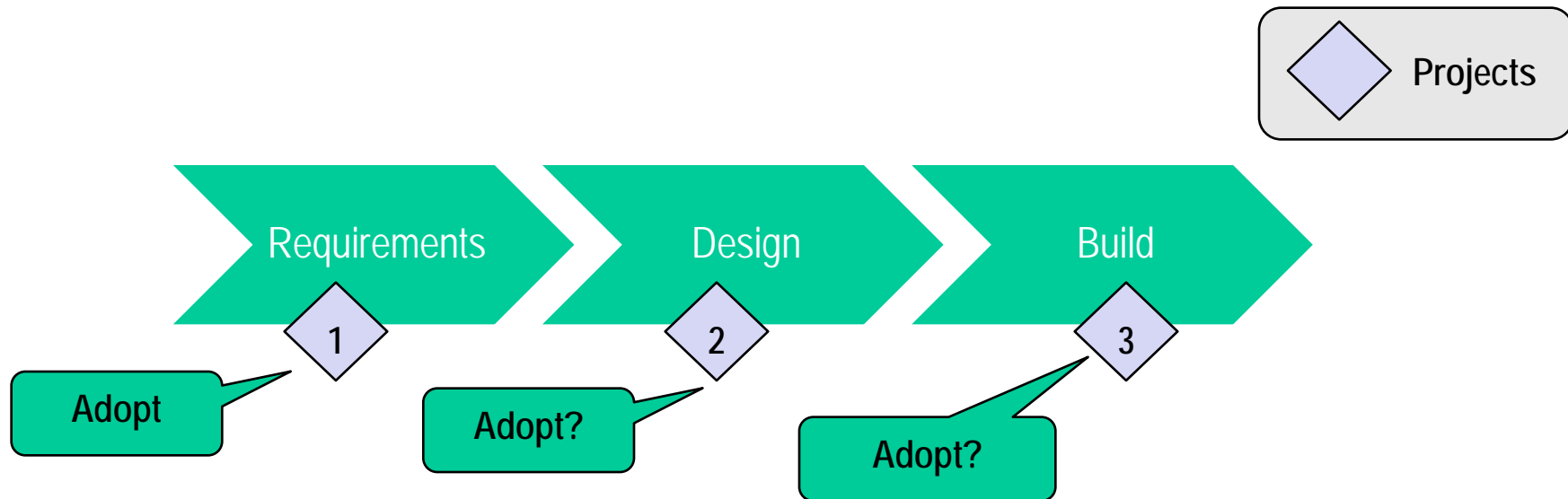
Example: New Design Document Template to be deployed



Certainly all new projects should adopt current processes, but what about active projects?

Process Adoption Considerations- Example #2

Example: Status Report Format Change to be deployed



Certainly all new projects should adopt current processes, but what about active projects?

How hard will it be to deploy this change?

There are several considerations:

- ❑ How much impact will the change have?
- ❑ Do we anticipate resistance for some reason?
- ❑ What is the consequence of the change not being adopted?

There are also several options:

- ❑ PPQA auditing (process or work product) may be sufficient (all projects or sampled)
- ❑ Class room training (with or without exercises)
- ❑ One-on-one mentoring
- ❑ Feedback collection at point of implementation
- ❑ Pilot before deploying

Strategic Plan

Before getting into the details, develop a strategy, for example:

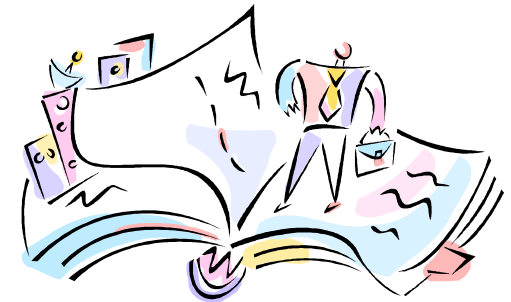
Example

- ❑ Our goal is for all new projects starting after October 1 to adopt the new process
- ❑ We plan to retire the current process by May of next year
- ❑ Projects will receive training on the new process at project start-up – annual refresher training will include an overview of the new process
- ❑ We will monitor adoption by:
 - ❑ Conducting lessons learned specific to this process
 - ❑ Auditing all projects for the first year

Tactical Plan – Overview

Process deployment also requires a tactical plan:

- ❑ Develop an integrated schedule that ties the process deployment to each affected project's life cycle
- ❑ Identify resources needed (facilities, people, materials)
- ❑ Schedule training, PPQA audits, other deployment support
- ❑ Schedule monitoring (evaluation of results)
 - ❑ Review PPQA results
 - ❑ Review training feedback
 - ❑ Review lessons learned



For some changes, we'll need a way to determine whether to stop and re-start the deployment

Tactical Plan - Measures

Establish measures for determining when you're done:

- ❑ When do we expect all projects to be using the new process?
- ❑ How long do we have to keep monitoring?
 - ❑ Monitor first “n” uses of the process?
 - ❑ Monitor through a certain date?
- ❑ How will we determine success of the deployment?
 - ❑ Satisfactory PPQA results?
 - ❑ % training attendance by teams?
 - ❑ Minimum survey results on deployment?
 - ❑ Feedback on deployed process (# of change requests or tailoring requests)?

Deploying processes at project startup

Project start-up should include providing guidance on defining and implementing the project's defined process:

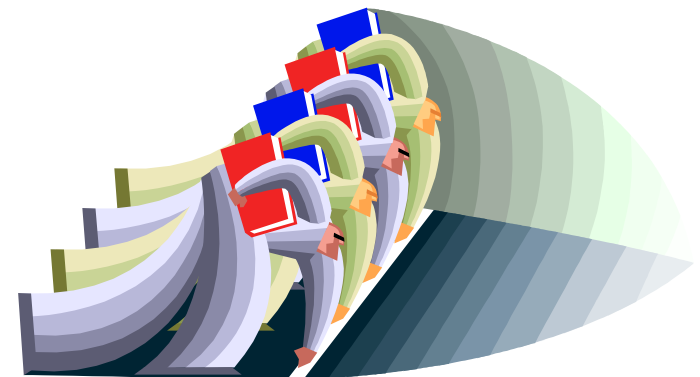
- ❑ Provide a reminder of recent process changes
- ❑ Check that everyone is trained on recent process changes
- ❑ Check for new team members and people who have changed roles
- ❑ If this will be one of the monitored projects, remind the team of this

Process deployment needs to consider impacts on the project start-up process

Ready, Set, Go!

Make sure you are ready to deploy:

- ❑ Assets are in the PAL
- ❑ Tailoring criteria is defined
- ❑ Communicate:
 - ❑ Who must comply and by when
 - ❑ What training will be provided and when
 - ❑ What additional assistance will be provided
 - ❑ Why the change is being made
- ❑ Training scheduled
- ❑ PPQA audits scheduled
- ❑ Support resources secured



What will monitoring tell us?

Training Results

- Was attendance adequate?
- Were training materials adequate?
- Additional or different training needed?

PPQA Audit Results

- Do audit results reflect adoption?
- Is audit efficient or overly time consuming?

Lessons Learned

- Are changes to the process needed?
- Have future improvements been identified?

Validation

- Does process change achieve business objective?

Was deployment
successful?

How will I know the deployment worked?

Ultimately, successful adoption means:

- ❑ PPQA audits indicate the process is being followed
- ❑ Lessons Learned indicate use of the process and identification of potential improvements rather than problems
- ❑ Evidence of process use (measures, work products, tailoring requests) are being collected
- ❑ Feedback on the defined processes and assets is used to improve them

What happens once the process is adopted?

- ❑ Training on the new process remains part of overall training
- ❑ PPQA audits continue to be performed (but possibly on smaller sampling of projects)
- ❑ Process improvements to training materials, PPQA assets, deployed assets, and deployment processes are captured
- ❑ Adoption measures are captured

Evaluating the deployment process

Evaluate and measure the deployment process:

- ❑ Surveys or lessons learned sessions with teams involved in the deployment
- ❑ Elapsed time to adoption versus size of change
- ❑ % of projects that used support
- ❑ # of deployment re-starts

Summary

Deployment planning can mean the difference between project deployment success and failure:

- ❑ Planning may take some time for the deployment team, but will save time for all impacted projects during deployment
- ❑ Projects plan and manage their work – the deployment team should do the same!

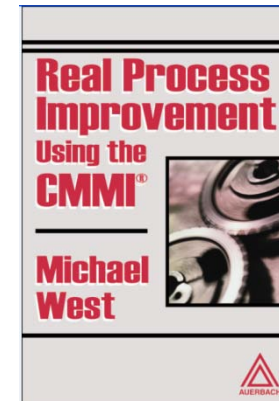
Take ownership for successful deployment!

Questions



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