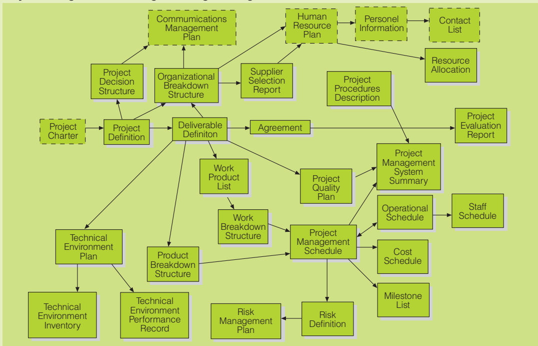
IBM Global Services Method 3.0

Engagement

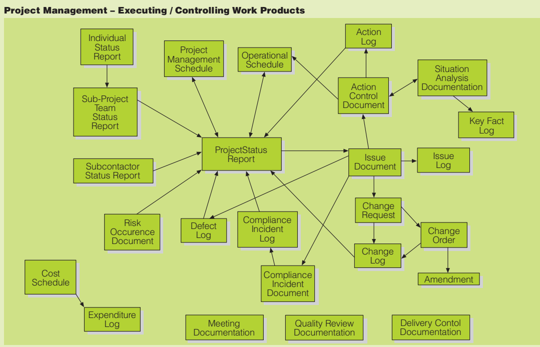
Project Management
- Action Control Document
- Action Log
- Agreement
- Amendment
- Change Log
- Change Order
- Change Request
- Communications Management Plan
- Compliance Incident Document
- Compliance Incident Log
- Contact List
- Cost Schedule
- Defect Log
- Deliverable Definition
- Delivery Control Documentation
- Expenditure Log
- Human Resource Plan
- Individual Status Report
- Issue Document
- Issue Log
- Key Fact Log
- Meeting Documentation
- Milestone List
- Operational Schedule
- Organizational Breakdown Structure
- Personnel Information
- Project Management System Summary
- Product Breakdown Structure
- Project Charter
- Project Decision Structure
- Project Definition
- Project Evaluation Report
- Project Management Schedule
- Project Procedures Description
- Project Quality Plan
- Project Status Report
- Quality Review Documentation
- Resource Allocation
- Risk Definition
- Risk Management Plan
- Risk Occurrence Document
- Situation Analysis Documentation
- Staff Schedule
- Sub-Project Team Status Report
- Subcontractor Status Report
- Supplier Selection Report
- Technical Environment Inventory
- Technical Environment Performance
- Technical Environment Plan
- Work Breakdown Structure
- Work Product List

Technical Delivery
- External Project Kickoff Presentation
- Engagement Plan
- Project Goals
- Internal Project Kick-off
- Phase Transition Package
- Scope and Approach Document
- Risk Analysis
- Deployment Plan
- High Level Implementation Strategy
- Candidate Asset List
- Configuration Management Procedures
- Glossary
- Increment Goals
- Project Estimates
- Project Workbook Outline
- Release Plan
- Hosting Plan
- Application Information Questionnaire
- Target Action Report

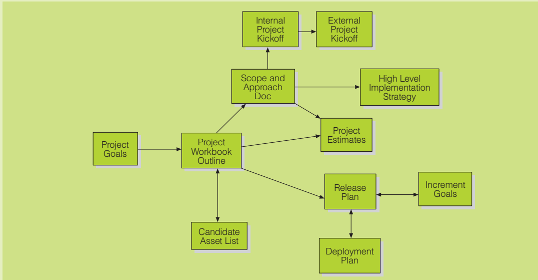
Project Management – Defining / Planning / Closing Work Products



Project Management – Executing / Controlling Work Products



Project Management – Technical Delivery Work Products



Business

Content
- Brand Concept
- Brand Materials
- Information Asset Profile
- Metadata Strategy
- Content Model
- Content Sourcing Plan
- Content Management Plan
- Content Assessment

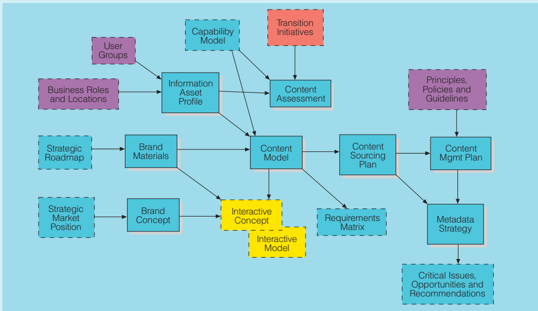
Financial
- Preliminary Cost-Benefit Estimation
- Business Case
- Benefit Impact Analysis
- Financial Assessment
- Financial Benchmarks
- Financial Work Plan & Model

Process
- Critical Issues Opportunities and Recommendations
- Future Process/Function Attributes
- Package Business Process Education
- Harmonization Model
- Business Event List
- Process Benchmarks
- Current Process Assessment
- Procedures Documentation
- Process Analysis
- Process Definition
- Process Enablers
- Process Gap Assessment
- Process Identification
- Proof of Concept

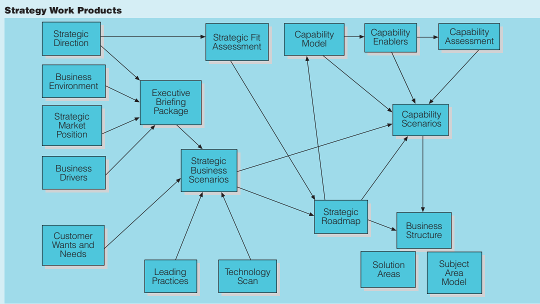
Selection
- Requirements Matrix
- Decision Model
- Request for Information
- Pre-Qualification Vendor Analysis
- Request for Proposal
- Vendor Response Results and Shortlist
- Demonstration Scripts
- Vendor Score Sheets
- Vendor Visit and Demonstration Schedules
- Vendor Reference Guide
- High Level Gap Analysis
- Benefits Control Book
- Vendor Selection Decision and Final Presentation

Strategy
- Leading Practices
- Business Drivers
- Business Environment
- Capability Assessment
- Capability Enablers
- Capability Model
- Capability Scenario
- Customer Wants and Needs
- Executive Briefing Package
- Strategic Business Scenarios
- Strategic Direction
- Strategic Fit Assessment
- Strategic Market Position
- Strategic Roadmap
- Technology Scan
- Solution Areas
- Subject Area Model
- Business Structure

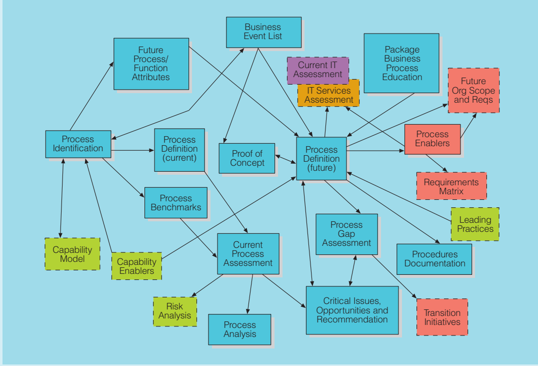
Content Work Products



Strategy Work Products



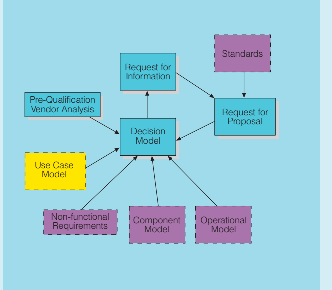
Process Work Products



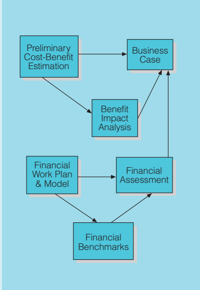
This is a special dependency diagram, which shows all work products of a domain/subdomain.

Usually dependency diagrams are per engagement model. They show the relationships between the work products of that engagement model, which are normally a subset of all work products in the domain/ subdomain. In this example the dependency diagram is from the Custom Application Development engagement model.

Custom Application Development – Business – Selection WP



Financial Work Products



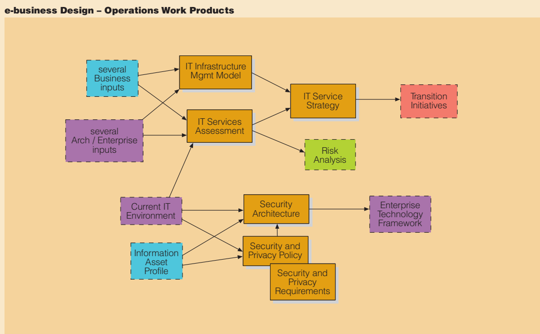
Operations

General - Operations
- Problem Incident Report
- Facility Requirements
- Future Facility Design

Information Technology Management
- IT Infrastructure Management Model
- IT Management Requirements
- IT Management Tools Assessment
- IT Service Design
- IT Services Assessment
- IT Services Detailed Design
- IT Services Strategy
- Managed IT Elements
- Recommended IT Management Solution Path

Security & Privacy
- Information Security Assessment
- Physical Security Assessment
- Privacy Data Profile
- Security and Privacy Policy
- Security and Privacy Requirements
- Security Architecture
- Security Architecture Principles

e-business Design – Operations Work Products

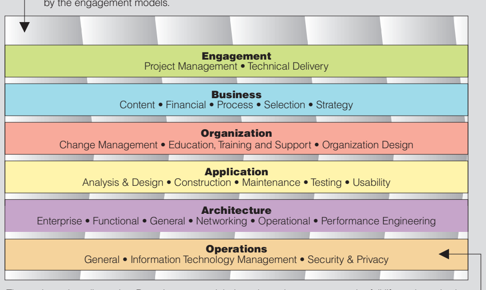


Structure of The Method

1 Matrix Structure

The Method has a matrix structure. One dimension are *work products* – the tangible work done in IBM projects. The other dimension are the *processes* which give guidance on when the work is done and by which roles.

The process dimension: The IBM Global Services Method offers a number of processes for different kinds of projects within the value chain, e.g. for consulting projects as well as for custom application development projects. Specific phase structures and project processes are defined by the engagement models.



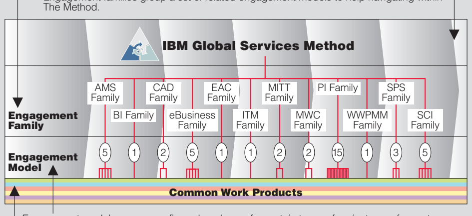
The work product dimension: Domain areas and their work products span over the full life cycle and value chain. This unifies IBM's language within and between projects. The work products of the Method are listed on the left and right side of this poster.

2 Specific Packages for Different Types of Projects

For different types of projects there are preconfigured packages, called *engagement models*. They provide a *selection of work products* out of the common set, and they provide a *process* as guidance for organizing the project and the work in a timely manner.

Process guidance in the IBM Global Services Method is specific to certain types of projects. It is provided as part of an engagement model.

Engagement families group a set of related engagement models to help navigating within The Method.



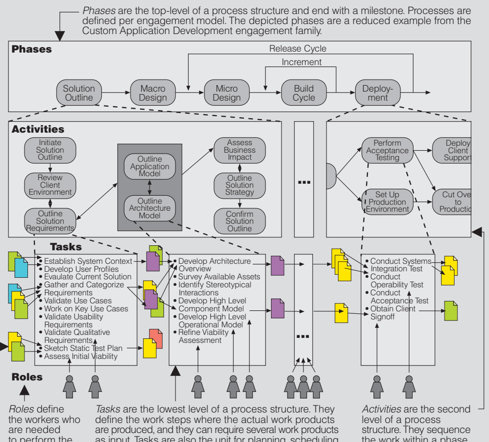
Engagement models are pre-configured packages for certain types of projects, e.g. for custom application develoment or for e-business strategy consulting projects. Engagement models contain a selection of work products, and they contain process guidance.

All engagement models use the work products out of the common set. Work products covering a certain aspect will be of the same type in all IBM projects, and output work products from one project in the value chain are possible input work products in a follow on project in the value chain.

3 Process Guidance and Work Products

The process guidance of an engagement model – called the *work breakdown structure* – is a three-level hierarchy of *phases, activities and tasks.* The link between the process guidance and the work pro-ducts is at the task level. Tasks produce work products as output and they need certain work products as input.

Phases are the top-level of a process structure and end with a milestone. Processes are defined per engagement model. The depicted phases are a reduced example from the Custom Application Development engagement family.



Work products are produced as out put of the process' tasks, and they are needed as input to the following tasks.

Roles define the workers who are needed to perform the tasks.

Tasks are the lowest level of a process structure. They define the work steps where the actual work products are produced, and they can require several work products as input. Tasks are also the unit for planning, scheduling and estimating.

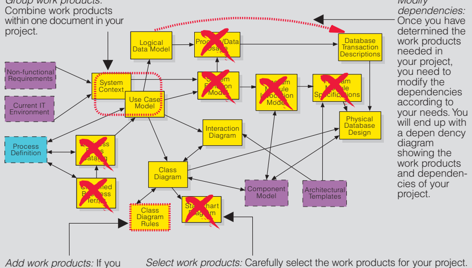
Activities are the second level of a process structure. They sequence the work within a phase.

Tailoring The Method

1 Determine Work Products

Deciding on the intermediate and end results of a project is one of the central tasks of project planning. Select the results from the common set of work products, adding additional work products specific to your project as needed. If an engagement model is close to match to your project, tailor from the reduced set of work products from that engagement model. Use dependency diagrams to understand the relationships between the work products.

Group work products: Combine work products within one document in your project.



Modify dependencies: Once you have determined the work products needed in your project, you need to modify the dependencies according to your needs. You will end up with a depen dency diagram showing the work products and dependen-cies of your project.

Add work products: If you need work products which are not in The Method, specify and add your project's unique work products.

Select work products: Carefully select the work products for your project. *Note that selecting work products has two dimensions: number of work products and depth of work products.* The actual amount of work done must be carefully aligned with your project's size and needs. Aligning the amount of work can be done by reducing the number of work products selected and by doing work products in different depth/detail.

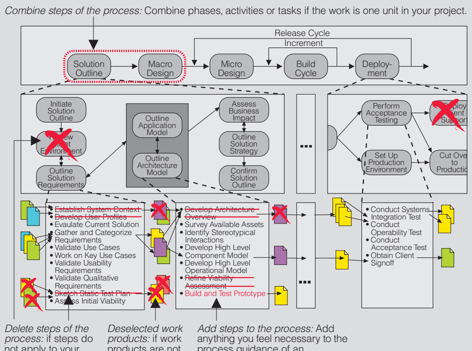
If there is no engagement model with a single close match, tailor from the set of work products from serveral partially matching engagement models, or, if necessary, directly from the overall set of work products.

Result: Definition of your project's work pieces and the contents of the project's repository.

2 Determine your project's process

After the decision on the work products, the work to produce the desired results must be organized. The process guidance of an engagement model can be used as a starting point to determine your project's process. If there is no engagement model's process which fits your needs, you must build the process from scratch. The result of tailoring the process will be your project's process which serves practitio-ners and project management as a guidance on how the project will be run.

Combine steps of the process: Combine phases, activities or tasks if the work is one unit in your project.



Delete steps of the process: if steps do not apply to your project, delete them or move an activity to another place if needed

Deselected work products: if work products are not produced in your project, the corresponding task can be deleted.

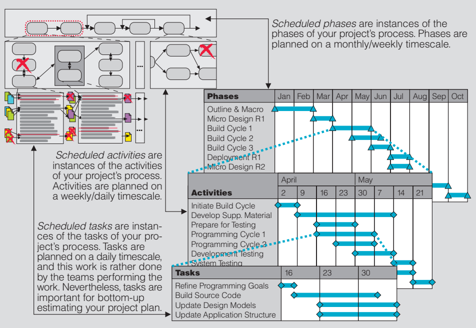
Add steps to the process: Add anything you feel necessary to the process guidance of an engagement model.

Result: Definition of your project's process.

3 Schedule your project

Your project's process is the blueprint for planning and scheduling your project. Phases, activities and eventually tasks will end up as work in your project plan, with the resources fulfilling the roles of the process and doing the work. Some of the activities or phases will be iterative, and thus a project's phase or activity might have serveral instances in the actual plan.

Scheduled phases are instances of the phases of your project's process. Phases are planned on a monthly/weekly timescale.



Scheduled activities are instances of the activities of your project's process. Activities are planned on a weekly/daily timescale.

Scheduled tasks are instan-ces of the tasks of your pro-ject's process. Tasks are planned on a daily timescale, and this work is rather done by the teams performing the work. Nevertheless, tasks are important for bottom-up estimating your project plan.

Result: Definition of your project's schedule.

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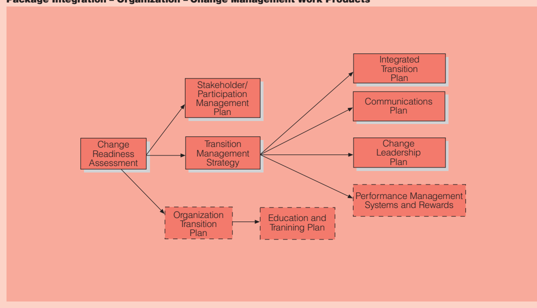
Organization

Change Management
- Communications Plan
- Change Leadership Plan
- Change Readiness Assessment
- Integrated Transition Plan
- Program Management Framework
- Stakeholder Participation Management Plan
- Transition Initiatives
- Transition Management Strategy

Education, Training and Support
- User Support Specifications
- User Support Materials
- Education & Training Evaluation
- Education and Training Plan
- Education and Training Strategy
- Education and Training Specifications and Materials

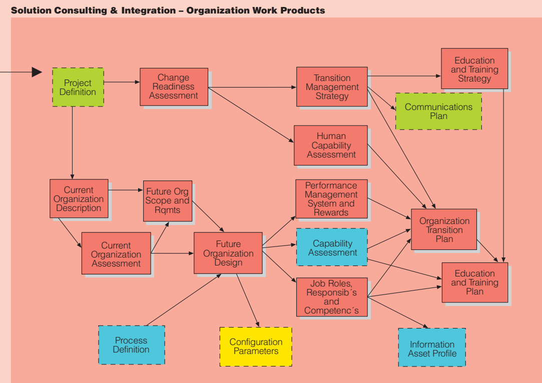
Organization Design
- Current Organization Description
- Future Organization Scope and Requirements
- Future Organization Design
- Performance Management Systems and Rewards
- Current Organization Assessment
- Human Capability Assessment
- Job Roles - Responsibilities and Competencies
- Organization Transition Plan

Package Integration – Organization – Change Management Work Products



Solution Consulting & Integration – Organization Work Products

For each work product there is a detailed work product description, which covers
- *Definition*
- *Purpose*
- *Notation*
- *Example*
- *Development Approach*
- *Validation and Verification*
- *Advice and Guidance*
- *References*
- *Estimation Considerations*



Application

Analyse and Design
- System Context
- Data Migration Maps
- Data Migration Plan
- Report Specifications
- Interface Specifications
- Analysis & Design Guidelines
- Physical Database Design
- Document Class Definitions
- Document Inventory
- Use Case Model
- Business Rules Catalog
- Classified Business Terms
- User Scenario
- Data Standardization Assessment
- External Data Reference Assessment
- External Data Reference Definition
- Content Plan

Object – Oriented
- Class Diagram
- Interaction Diagram
- Statechart Diagram
- Business Object Model

Package Integration
- Package Extension Specifications
- Detailed Gap Analysis

Structured
- Logical Data Model
- System Function Model
- Process/Data Usage
- Program Module Invocation Model
- Program Module Specifications
- Database Transaction Descriptions

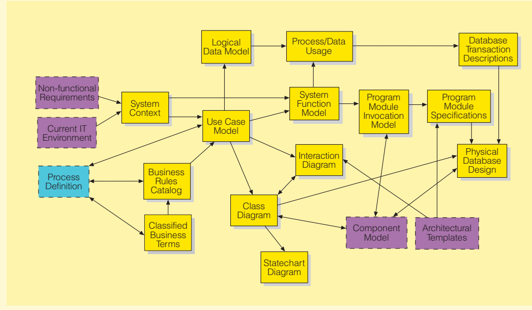
Construction
- Data Migration Programs
- Package Extensions
- Report Programs
- Interface Programs
- Document Type Definition
- Build Procedures
- Coding Guidelines
- Executables
- Physical Packaging
- Source Code
- Media Content
- Configuration Parameters

Maintenance
- Application Maintenance Turnover Package
- Baseline Survey
- Emergency Fix Analysis
- Impact Analysis
- Problem Resolution Report
- Service Request
- Code Analysis Report
- Candidate Report
- Code Comparative Analysis Report

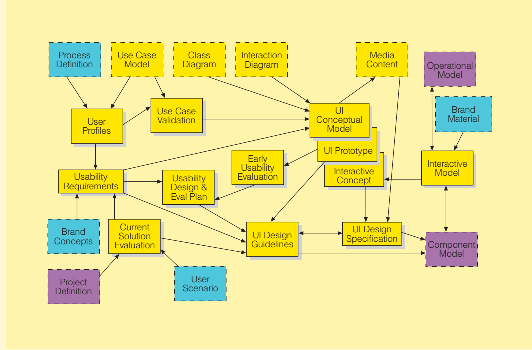
Testing
- Acceptance Test Plan
- Detailed Test Plan
- Master Test Plan
- Quality Plan for Application Domain
- Static Test Plan
- Test Environment
- Test Execution Plan
- Test Report
- Test Results
- Test Specification
- Test Strategy

Usability
- Cabinet Folder Hierarchy
- Usability Requirements
- Current Solution Evaluation
- Early Usability Evaluation
- Usability Design and Evaluation Plan
- Use Case Validation Report
- User Interface Conceptual Model
- User Interface Design Guidelines
- User Interface Design Specifications
- User Interface Prototype
- User Profiles
- Main Menu Hierarchy
- Usability Test Plan
- Interactive Concept

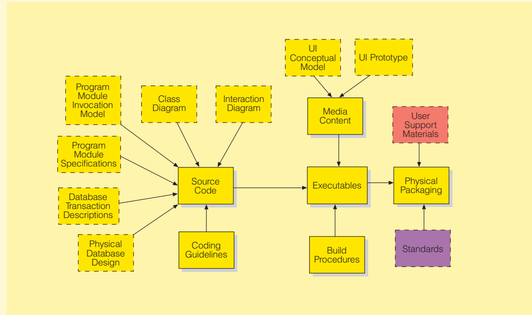
Custom Application Development – Analysis & Design Work Products



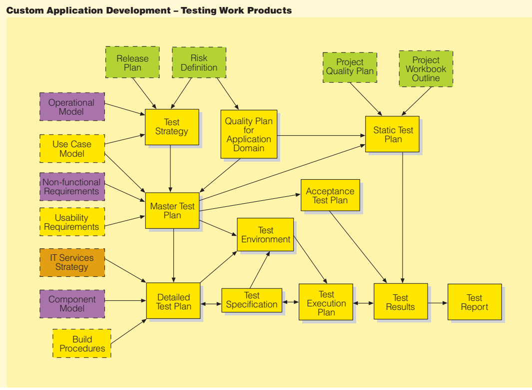
e-business Custom – Usability Work Products



Custom Application Development – Construction Work Products



Custom Application Development – Testing Work Products



Architecture

Enterprise
- Application Function Model
- Business Roles and Locations
- Current IT Assessment
- Data and Function Access and Placement
- Data Stores
- Enterprise Information Model
- Enterprise Technology Framework
- User Groups

Functional
- Application Programming Interface
- Architectural Template
- Component Model

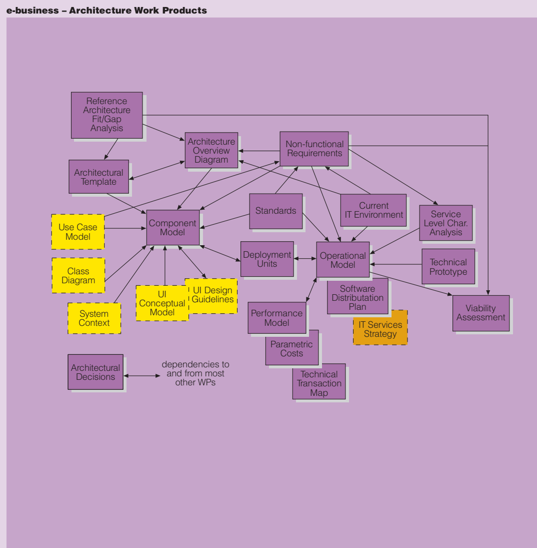
General - Architecture
- Architectural Decisions
- Architecture Overview Diagram
- Reference Architecture Fit-Gap Analysis
- Technical Prototype
- Viability Assessment
- Change Cases
- Non-Functional Requirements
- Feasibility Study
- Principles - Policies and Guidelines
- Standards
- Architecture Management Framework

Networking
- Network Requirements
- Network Node Design
- Conceptual Network Design

Operational
- Infrastructure Gap Analysis
- Infrastructure Cost Plan
- IT Technical Implementation Plan
- Infrastructure Process Plan
- Deployment Unit
- Operational Model
- Service Level Characteristic Analysis
- Software Distribution Plan
- Current IT Environment

Performance Engineering
- Parametric Costs
- Performance Model
- Technical Transaction Map

e-business – Architecture Work Products



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