Service Portfolio v2
ID: 189560

Green

General

Account:	Planning & Project Management Office (PPMO)
Type:	Mary L. Pretz-Lawson - Project Request
Portfolio(s):	
Classification:	Projects
Priority:	Medium

Description: The PPMO created a division service portfolio in 2007-2010 to define service names, service owners, and service dependencies. It was difficult to keep current and did not map closely enough to our customer's definition of services. In the meantime, the use cases for a divisional service framework have continued to grow, e.g., Senior Management Team slate of work snapshots and Numara service tracking attributes.

The second version of the division service portfolio will document the use cases and prioritize the division value proposition. The PPMO will build a new service portfolio that will meet the chosen use case needs. The granularity of the next iteration of the service portfolio (v2 or pilot in the proj request) will be determined by the 2 use cases the steering committee selects.

To keep the new service portfolio updated, we will integrate it into other division processes, at a minimum SII (Secure Integrated Infrastructure) and OLAs (Operational Level Agreements). The exact nature of the integration will depend on the granularity of the v2/pilot.

We will be hiring a consultant to define the service portfolio methodology and a contract worker to construct the service portfolio. Consulting contract may include limited (consultant) SME hours and higher number of (contractor) worker-bee hours.

The initial service framework will be based on the chosen 1-2 use cases. The project (and consulting contract) will be divided into phases.

0. Consultant RFP and selection (Jan-Feb)
1. Use case definition and selection - use cases documented with requirements, e.g., SMT snapshots, Numara services attributes, division CMS, Doc repository/info center, SAIS escalation, NICS service list, SII integration, OLA integration, DR/BC integration, "CIO services list." Steering committee selects 1-2 use cases for initial pilot. Include services along SIMPLE>COMPLEX and CURRENT>FUTURE spectrum. (Mar-Apr) CHECK: NICS, SAIS, GITS buy-in.
2. Service portfolio definition and attributes - interview external customers and internal service owners. Steering committee verifies service names and attributes for pilot. (Apr-May) CHECK: Define interface with Numara post-Proof of Concept.
3. Process integration - Define integration points between service portfolio and division processes. Cull past service frameworks (PPMO, NICS, SAIS, RPM) and tools (TeamDynamix, Excel, Sharepoint) for usable pieces. (May-June) CHECK: RPM use with department "slate of work" snapshots.
4. Build pilot service portfolio - choose service portfolio pilot tool. Populate services and attributes. (June-Oct) CHECK: Do SAIS, NICS, and GITS gain value?
5. Define maintenance and data renewal mechanisms - Define operations and maintenance processes and needed resources including division process integration. Generate monthly service portfolio status report. (Oct-Dec) **END OF THIS PROJECT**
6. Select two more use cases and iterate.
7. Process improvements with integration with SII and OL

Requirements: Requirements:
- Sufficient division resources and readiness/maturity/buy-in to provide service data, process integration points to work with consultant.

This plan is based on the following assumptions (about resources, policies, schedules, technologies, etc.):
a. PPMO will be service portfolio owner long term
b. External customer service definitions and owner service definitions can be reconciled, at least for pilot
c. Exisiting division tools can be used for service portfolio pilot, or TeamDynamix can be modified
d. Consultant does most of the leg work in building pilot service portfolio instance
e. Division resources and readiness of technical leads of services/systems to provide service data.

Identifier:	FC66
Manager:	Mary L. Pretz-Lawson
Manager Status:	🟢 Green [Project is on track]

15% complete, updated on Friday, 05/04/2012 10:09 AM by Mary L. Pretz-Lawson

Changed percent complete from 10% to 15%.
The consultant, Third Sky, conducted onsite assessment and education events Apr 24-26. They met with 25 division stakeholders including SMT, project team (Monroe, Dugas, Jackson), PPMO Sr Proj Mgrs, and other division staff (Ortyl, Cohen, DBlair). The 10 use cases were the basis for determining the scope breadth and depth of the 2012 work.

Third Sky will deliver their assessment findings, recommended scope, and straw proposal for the service catalog on May 7. They will conduct a 1-day service catalog workshop for 20 participants on May 14. The outcome of the

workshop will be 4-6 draft service descriptions.

The steering committee and project team will validate the service catalog framework culminating in a Third Sky presentation and validation exercise at the May 22 Management Team meeting.

Sponsor Name:	Carrie Regenstein (carrie1@cmu.edu)
Date Created:	Monday, 02/13/2012 11:05 AM
Date Modified:	Friday, 05/04/2012 10:09 AM
Active:	True
T&E Approval:	Time and expenses should be approved by the project manager
Resource Mgmt:	Manage By Project
Mode:	Standard Project

Custom Attributes

Problem Statement	Previous service portfolio efforts have been dificult to keep current and have not shown sufficient value. By more fully documenting use cases, and defining and integrating existing division processes into the pilot development, the new service portfolio will be self-renewing.
Deliverables	Service Description for Service Portfolio Pilot: A light weight division service portfolio that includes external customers' view/titles of services linked to internal division view/titles of services. Integration with SII and OLA/SLA operational processes such that each of these processes inform and renew the others' data. Pilot service portfolio will be build with existing division tools. Value is defined by GITS, NICS, and SAIS based on selected use cases for pilot.
Scope Definition	In scope: - Pilot service portfolio based on chosen 1-2 use cases - Documentation on all service portfolio use cases - External customer view (service names) of division services Out of scope: - Service portfolio to meet all use cases - Service portfolio pilot to meet external customers needs due to other enterprise projects competing for same resources Uncertain Scope: - Buying service portfolio tool - expect to use existing division tools (Sharepoint, TeamDynamix) - Service portfolio dependencies on other division projects, e.g., document repository, Numara, SMT slate of work snapshots
Success Criteria	- Monthly service status report generated for 3 months; Workflow for SII and OLA process integrations are documented; Process integrations that renew service portfolio data generated for 3 months; Good Satisfaction rating from steering committee; Pilot service portfolio tool is usable for 2 more use cases; Traffic and "organic maintenance" beyond pilot.
Timeline Requirements	Consultant/contractor work completed by 12/31/12
Fiscal Year	FY12
Review/Approval Designation	Review/Approval Project
Project Style	Delivery
Criteria for Submission	$50K or Greater or 8+ weeks of work $25-$50K or 4-8 Weeks Work and Architect recommended
University Strategic Alignment	Pillar 6: Finance & Infrastructure
Stakeholders	Computing Services: Academic Technology Services (ATS) Computing Services: Administrative Computing (AC) Computing Services: Architecture and Technology Integration (ATI) Computing Services: Global IT Services (GITS) Computing Services: Information Security Office (ISO) Computing Services: Network, Infrastructure, and Communications Services (NICS) Computing Services: Planning and Project Management Office (PPMO) Computing Services: Qatar (QATAR) Computing Services: Resource Planning & Management (RP&M) Computing Services: Systems and Applications Integration Services (SAIS) Computing Services: Vice Provost's Office (VPO)
Project Dependencies-Department (Anticipated)	Architecture and Technology Integration (ATI) Global IT Services (GITS) Network, Infrastructure, and Communications Services (NICS) Planning and Project Management Office (PPMO) Resource Planning & Management (RP&M) Systems and Applications Integration Services (SAIS)
Portfolio Planning Cycle	Ongoing Submission

Ongoing Submission Information

PPMO Consultant Chris Nolin

Date Details

	Initial	Baseline	Current	Base/Current Var	Init/Current Var
Start Date	Tue 1/3/12		Tue 1/3/12		1
End Date	Mon 12/31/12		Mon 12/31/12		1

Hours|Budget

	Initial	Current	Var	Accrued	Accrued%
Time	$0.00	$0.00	$0.00	$0.00	
Expenses	$100,000.00	$100,000.00	$0.00	$0.00	0.00 %
Total Budget	$100,000.00	$100,000.00	$0.00	$0.00	0.00 %
Hours	1890	1890	0	0	0.00 %
Workdays	260	260		89	34.23 %

Quick Facts

Issues	
Open:	2/4 (50%)
In Process:	2/4 (50%)
Postponed:	0
Closed:	0
Tasks	
Completed:	20/31 (64.52%)
InProcess:	0
OverDue:	2/31 (6.45%)
Not Started:	9/31 (29.03%)
Milestones:	0/0 (0%)
Actual Hours	
Tasks:	0.00
Issues:	0.00
Project-Level:	0.00
Time Off:	0.00
Total:	0.00

Risks

1. Medium: Financial Complexities
   External consultant/contractor will do much of the work.

2. Medium: Impact on Other Projects
   Service portfolio will need to be integrated into other division processes. There may be a
   dependency with Numara service tracking project.

3. High: Resource Complexities
   We know from past service portfolio work that we will need service owner resources which can be over-committed elsewhere.

4. Low: Scheduling Complexities

5. Medium: Scope Complexities
   1-2 use cases will be selected for service portfolio pilot. There may be a scope dependency with Numara service tracking project.

6. Low: Technical Complexities
   Expect to use existing division tools (Sharepoint, TeamDynamix) for service portfolio pilot.

7. Medium: Unknown Complexities
   Service portfolio will be integrated with other division processes, specifically SII and OLAs.

Composite Score:	
Composite Score PCT:	
Scorecard Score:	
Goals Score:	0.00
Risks Score:	0.38

Stakeholders

Chuck Bartel

crb@cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition

Mon 12/19/11 12:56 PM

Dan McCarriar

dlm@cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition

Mon 12/19/11 12:57 PM

David Baisley

david@cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition

Mon 12/19/11 12:56 PM

Ken Hallinen

kh0r@andrew.cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition

Mon 12/19/11 12:55 PM

Mark Poepping

poepping@cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition

Mon 12/19/11 12:57 PM

Mary Ann Blair

macarr@cmu.edu

Accountable, Consulted

Steering Committee member, consultant selection, use case selection, approval of service definitions, verification of division value proposition.

Wed 2/8/12 11:40 AM

Mary L. Pretz-Lawson

mlpl@cmu.edu

Responsbile

Project manager, consultant supervisor, project team coordinator, responsible for project plan and deliverables, SMT & VPO reporting

Mon 12/19/11 1:09 PM

VPO

carrie1@cmu.edu

Consulted

Sponsor - verification of service portfolio value proposition, funding for consultant, use case selection, executive support

Mon 12/19/11 12:52 PM