EXECUTION –
The Key to Success!

“The Top 10 Steps for Achieving Successful Institutionalization of Processes and Tools”
Agenda

• Why you are here … the problem
• Why I am here … a solution
• Why you can’t leave … your success depends on this presentation

You must take these 10 Steps home!
Three Objectives – The Approach

• Understand the need for a systematic deployment process

• Understand an example deployment framework – 10 Steps to Success

• Understand benefits of this deployment framework
Objective 1
Understand the need for a systematic deployment process
Current State

1. Design & Build

2. Peer Reviews

3. Deliver Processes

4. Training
Step 5 – Measure the Seismic Shock
Why Does This Prevail?

• We do not teach our processes/models and tools developers the required deployment skills

• We often use the premise that we build it and someone else “integrates” it (sounds like software development?)

• We do not always use the same discipline to understand and perform deployment tasks that we do for product development … deployment is hard and requires 2 to 3 times more effort than development of the product or service
If we understand what deployment is and how to effectively employ a defined deployment process … there is hope.
What is Deployment?

Deployment is:

• Understanding the **readiness** of the organization – and using that data in your plans

• Ensuring the right **communication**, at the right time, to the right people

• Ensuring the right **training**, at the right time, to the right people

• Ensuring **accessibility and ease of use** of processes and tools for all employees

• Conducting **reinforcement** activities to reinforce desired behaviors

• Using a structured **feedback** process to capture data from a variety of sources

• Using a defined **measurement** system to gather and analyze data, and to take action on a real-time basis
What is Deployment?

• Deployment Includes:
  – Marketing, Sales, Training, Communication, Reinforcement, Delivery, Support, and Feedback & Measurement of customer satisfaction and product effectiveness

• Lifecycle Activities Include:
  – Planning, Requirements, Design, Implementation (includes pilots), Delivery, Verification & Validation, Feedback & Measurement, & Post Mortem activities

There is a model that depicts this for you!
Objective 2
Understand an example deployment framework
Deployment Lifecycle Model – 10 Steps

1. Assess Current State & Org Readiness
2. Develop CALO & Other Requirements
3. Set Strategy & Priorities
4. Define Processes & Measures & Plan Actions
5. Execute Pilot(s)
6. Execute, & Track Deployment
7. Conduct Deployment Audits
8. Document & Analyze Lessons Learned
9. Update Deployment Approach
10. Feedback to Stakeholders

Based on the IDEAL™ Model from the SEI
Deployment Lifecycle Model – Translating the Wheel into Action

<table>
<thead>
<tr>
<th>Planning</th>
<th>Requirements</th>
<th>Training (+Mentor/Coach)</th>
<th>Communication</th>
<th>Reinforcement (+/-)</th>
<th>Producing the Product</th>
<th>Post Mortem</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Feedback and Measurement Activities</td>
<td>Verification &amp; Validation Activities</td>
<td>Analysis &amp; Appraisal Activities</td>
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</table>
Before you execute this Framework

Before you begin:

- Find someone with a passion for deployment and give them the role and the responsibilities to develop a set of processes focused on deployment of processes and tools
- Integrate those processes and tools into your process definition system

Passion + Process + People + Tools = Success
10 Points of Emphasis

1. Define the problem you’re trying to solve
   – Match the problem to your organizational goals (Specific, Measurable, Achievable, Relevant, and Timely - SMART)
   – Create a vision that is compelling to leadership
   – The problem and vision must talk to stakeholders at each level
   – Analyze the current baseline to identify/answer: What problems are being faced by the stakeholders at each level with the current process/tool?

2. Obtain a sponsor and be prepared to coach

3. Charter a team and clearly define R&Rs – empower them (include HR, Communications, Knowledge Management, Quality, Operations/Engineering, Process Improvement)

4. Capture the Core Assumptions and Learning Objectives (CALO) for relevant stakeholders

None of these are engineering issues!
10 Points of Emphasis

6. Use the CALO to frame the requirements for all deployment activity.

7. **Design** products and state approaches that would be used to implement them.

8. **Develop** deployment products (communications/training/etc)
   - Pilot key work products to validate them (use a Decision Analysis and Resolution process for pilot selection)
   - Conduct Train the Trainer sessions

9. Ensure **Deployment Plans** (for the Sites/Divisions/etc.) are ready for use – only for large organizations

10. **Deploy!!!** … deliver products to projects based on the sequence defined in the deployment plan and execute all deployment activities

None of these are engineering issues!
Objective 3
Understand benefits of this deployment framework
Real World Statements of Success

“I have a 90% shot at success thanks to this process!”
(Deployment Lead)

“...the most energy we’ve seen in a long time”

“I had step by step methods that were easy to understand and follow” (EPG)

6-Sigma 80%
Benefits of a Systematic Process

- Success likelihood raises from 25% to 50%, to **greater than 80%** (per a Six Sigma study)
- Using a defined process results in **repeatability** and the ability to **remove variation** from the process of deployment
  - Level 2 Define and use a repeatable process for deployment
  - Level 3 Institutionalize this process across all projects and use the organization standard measurement system
  - Level 4 Use SPC to remove special cause of variation from the process and subprocesses
  - Level 5 Use SPC to remove common cause of variation from the process and subprocesses

Success Is Only 10 Steps Away
Summary

• Deployment activities require planning/early diagnosis to be effective, or ... we will react to crisis and reduce the likelihood of success

• Acceptance of the need for a deployment focus is needed, or ...we’ll create it, put it on the Intranet, and they will come!

• Middle Management has to be involved and committed throughout the deployment lifecycle, or ... buy-in by developers of the delivered process is hard to come by

• We must reverse the organizational tendency to stall when the latest fire has been put out, or ... we’ll continue to foster the concept that the process or tool we’re deploying is just the “process of the day”

• Deployment requires a set of processes and tools to be repeatable, or ... we’ll continue to work in an ad hoc deployment mode resulting in less than desirable levels of process compliance

None of these are engineering/IT issues!
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Additional Slides
## Pilot Selection Process

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### Relationship Scale

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<td>1</td>
<td>Remote Impact</td>
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<tr>
<td>2</td>
<td>Moderate Impact</td>
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### Weighting Scale

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<tr>
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### Pilot Selection Template

#### Output

- Date to Pilot
- Previous Experience with the process or tool
- Availability of resources to support pilot
- Culture readiness

#### Pilot Requirements

- Design to support the pilot
- Additional requirements as applicable

#### Total Value

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<th>Weight</th>
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</tr>
<tr>
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