SMART-AF

Draft of Letter to Customer

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**SMART-AF**

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*<This is to serve as a reminder of details that should already have been worked out with the customer POC. This should be crafted to be suitable for the POC to forward to all the participants. Limit any read-ahead preparation, try to get the POC to identify an organizational structure (with roles and responsibilities, if possible), and an overview of the organization’s major business functions - which may come from a web link. >*

Dear <x>:

This letter is to help you finalize preparation for the SMART-AF scheduled for <dates> from <time, nominally 8:00 - 5:00> at <location>. Attachment 1 provides a preliminary agenda for the engagement.

**Opening Presentation:**

We have allotted 45 minutes for your organization to present details on both the organization’s overall structure, including any internal IT departments, as well as the organization’s main mission and business functions. This will help establish the context of where the organization wants to go.

**Attendance:**

The SMART-AF has several distinct process steps that may require a different mix of attendees to be available at different times. All should attend the introductory presentation by the SMART-AF team, *<name>*. During the first two working sessions of SMART-AF (*Establish Context* and *Analyze Business Intent*), a group of 4-6 key business leaders and managers should be present. These people should be able to address the first set of questions in Attachment 2 and need to be present for both sessions; the process is not suited for people to drop in and out of the meeting. For the next two sessions (*Analyze Technical Intent* and *Review Current Technology*), a group of 4-6 key technical leaders as well as other IT experts should be present. These people should be able to address the second set of questions in Attachment 2 and need to be present for both sessions. As noted earlier, the process is not suited for people to drop in and out of the meeting.

For the fifth session of SMART-AF *(Establish Success Criteria)*, a group of 4-6 business and technical leaders, drawn from those who participated in earlier sessions, should be present to provide information on the criteria that defines business and technological success and how the criteria can be applied to determine success.

After a short break for the SMART-AF team to meet separately to analyze the data presented, the sixth and final session *(Review and Corroborate Findings)*, will provide a brief overview of the findings. This session should be attended by the same persons as in session five. The findings will form the basis for an initial report on the SMART-AF.

The SMART-AF team will prepare a formal presentation on *Findings and Recommendations* that will be delivered to the organization’s leadership; this presentation will optimally occur two weeks after the SMART-AF site visit. It is strongly urged that all participants in the SMART-AF assessment be invited to this presentation.

Optionally, a larger group of people may attend the introductory presentation described above. However, a condition of this option is that it does not cause lengthy relocation for the rest of the SMART-AF sessions.

**Logistical Details:**

Please note these two special needs: necessary arrangements for access to the facility, such as visit requests, and a temporary work area for the evaluation team members to compile their preliminary findings prior to session 6.

We look forward to working with you.

Sincerely

<SMART Team Lead>

Attachment 1

<SMART-AF Draft Agenda >

Attachment 2

<Pre-Assessment Questions for SMART-AF Assessment>