



Consolidated Technology Services • WA

State Data Center

Customer Engagement Plan

Version 1.0

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Contents

Document Revision History 3

Introduction..... 4

Purpose..... 4

Key Roles 5

Implementation Readiness Planning and Controls 11

Communication Plan 13

Performance and Quality Metrics 15

Document Revision History

Description of Change	Page or Section	Date Revised	Reviser
Version 1 complete and published.	All	1/23/2013	Steve Lovaas

Introduction

Effective customer engagement is critical to successful service implementations. By consistently utilizing well-planned, transparent, and timely interactions with all customers, we will create a clear vision and common understanding for all implementations. Our belief is that this will build confidence and maximize our opportunity for success.

In developing our customer engagement methodology Consolidated Technology Services (CTS) has incorporated the experiences and lessons learned from prior enterprise implementation projects and initiatives. The outlined approach is designed to leverage those proven results along with best practice and represents our commitment to continually deliver highly successful implementations in collaboration with our customers.

Purpose

This *Customer Engagement Plan* (CEP) is intended for use by both internal and customer staff involved in State Data Center (SDC) implementation projects. Most implementations will include interactions with more than one internal CTS work group. In turn these work groups will need to interact with each other as well as customer representatives. The CEP provides a repeatable framework for consistency of informing, involving, and coordinating with customers. These collaborative efforts will be coordinated by the CTS Client Liaison as a single point of contact for the customer.

The CTS Client Liaison will ensure that our customers and internal CTS teams are fully informed and aware of the goals, objectives, requirements and related business processes for all phases (i.e. initiation, planning, execution, and closing) of each implementation. We will use clear, common and consistent terminology to identify and document:

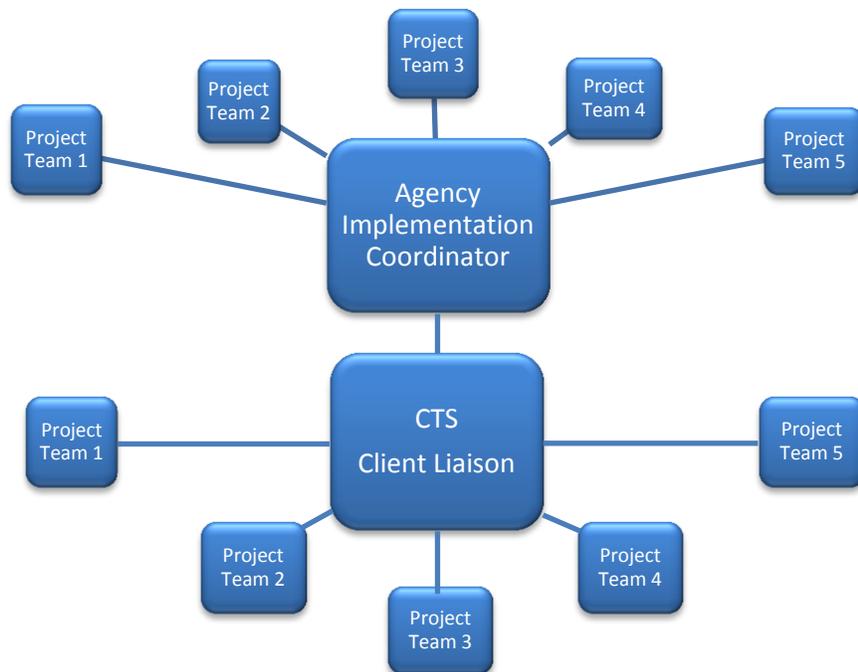
- Roles and responsibilities
- Implementation processes
- Communication Plan
- Performance and quality metrics

Key Roles

This section contains a description of the various roles that are covered in this CEP and that will be typically included in SDC service implementations. The following table identifies each role for both CTS and customer agencies' project teams and includes a brief overview of their vested interests and coordination points. The various roles are:

- **CTS Project Team**
 - CTS Client Liaison
 - CTS Project Managers and Teams
- **Customer Project Team**
 - Agency Implementation Coordinator
 - Agency Project Teams

Typically the CTS Client Liaison will work directly with the customer's Implementation Coordinator to ensure all communications flow through a single point of contact for both parties and that planning is well defined to support the implementation.



It's important to note that additional roles may be included depending on individual implementation requirements. In some cases certain roles may be combined and performed by a single person.

Table One – Details Describing Project Roles			
Role	Description	Interests	Points of Coordination
CTS			
Client Liaison	<ul style="list-style-type: none"> Oversee all communication activities with customer as single point of contact Report implementation readiness/status Facilitate assessment of and appropriate changes to CTS procedures, operations, systems, and policies Ensure that implementation activities are integrated and coordinated with other state and CTS initiatives and projects Provide input to the customer specific implementation plans Coordinate all customer meetings Manages Action Item Log 	<ul style="list-style-type: none"> Implementation strategy Communication Readiness materials Coordinated business processes Changes to business operations and strategies Project schedule and deliverables Customer agency satisfaction 	<ul style="list-style-type: none"> Senior Project Manager Project Sponsor Service Owners Customer Implementation Coordinators Assigned Project Managers
Project Managers	<ul style="list-style-type: none"> Develop and execute the service implementation project plan Coordinate the activities of CTS and customer project teams in accordance with duties defined by the Senior Project Manager Ensure project team technical readiness activities Develop readiness materials Validate customer readiness Develops and supports project schedule management and reporting Manages implementation Risks and Issues Log 	<ul style="list-style-type: none"> Implementation strategy Implementation scope, schedule and budget Appropriate deployment and use of resources Project deliverables Readiness materials Changes to business operations and strategies Service performance Customer satisfaction 	<ul style="list-style-type: none"> Client Liaison Senior Project Manager Service Owner Project teams
Project Teams	<ul style="list-style-type: none"> Subject matter experts for service technology and facilities Ensure end user and business needs Facilitate resolution of business and technical issues Create and/or review deliverables and provide feedback to ensure business needs are met Support definition of interface requirements and testing 	<ul style="list-style-type: none"> Business and customer requirements Changes to business operations and strategies Project schedule and deliverables Readiness materials Customer satisfaction 	<ul style="list-style-type: none"> Assigned Project Manager Project teams

	<ul style="list-style-type: none"> • Assist in issue, risk, change and problem identification, tracking and resolution • Assist in requirements/needs definition • Implement hardware and software in the SDC 		
Customer			
Implementation Coordinator	<ul style="list-style-type: none"> • Oversee all communication activities with CTS • Responsible for internal agency coordination in support of customer readiness activities • Identify, communicate, and escalate as needed project risks, issues and actions items • Coordinate agency service requirements • Coordinate deliverables with project team • Validate agency readiness • Develops and supports project schedule, management and reporting • Manages implementation Risks and Issues Log • Serves as an advocate of change 	<ul style="list-style-type: none"> • Implementation strategy • Communication • Coordinated business processes • Changes to business operations, strategies and policies • Project scope, schedule, budget and deliverables • Readiness materials • Customer sign off • Service performance • Customer satisfaction 	<ul style="list-style-type: none"> • Internal agency management and staff • Client Liaison • Assigned Project Manager • Project Team
Project Teams (may include project manager, technical leads, SMEs, etc.)	<ul style="list-style-type: none"> • Develop and execute the service implementation project plan in collaboration with CTS Assigned Project Manager • Subject matter experts for service requirements • Identify and document end user and business needs • Facilitate resolution of business and technical issues • Create and/or review deliverables and provide feedback to ensure business needs are met • Support definition of interface requirements and testing • Assist in issue, risk, change and problem identification, tracking and resolution • Assist in requirements/needs definition • Ensure agency project team technical readiness activities • Participate in acceptance testing of installed hardware and software in the SDC 	<ul style="list-style-type: none"> • Business and customer requirements • Changes to business operations and strategies • Project schedule and deliverables • Readiness materials • Customer satisfaction 	<ul style="list-style-type: none"> • Implementation Coordinator • Assigned Project Manager • Project teams

Behind the scenes, the SDC Projects are supported by additional roles to ensure the successful completion of the projects, but also the long term success of the ongoing services offered out of the SDC.

Table Two – Details Describing Project Roles			
Role	Description	Interests	Points of Coordination
CTS			
Executive Sponsor	<ul style="list-style-type: none"> • Acts as final authority on escalated issues • Acts as final authority on decisions related to the program budget • Approves scope, schedule, and budget changes that significantly impact the program 	<ul style="list-style-type: none"> • SDC strategy, vision and policy • SDC business operations and staffing • Executive communication 	<ul style="list-style-type: none"> • CTS Executive Management • OCIO • CAC • TSB • Executive Sponsor • Steering Committee • SDC Sr. Project Manager • SDC Program Support team • Enterprise Projects team • Service Owners
Project Sponsor	<ul style="list-style-type: none"> • Supports the organizational, political, and financial goals and objectives of the SDC. • Defines strategic vision and conveys program importance to agency and external groups • Communicates regarding SDC strategy, policy and operations with stakeholders, external entities, and partners (e.g. OFM, customers, etc.) • Approves scope, schedule, and budget changes that significantly impact the program • Resolves issues that cannot be resolved at a lower level • Ensures program supports agency’s strategic business direction • Provides budget accountability and contract signature authority • Authorizes supplemental personnel resources as required • Reviews and approves key project deliverables • Drives policy decisions for the program 	<ul style="list-style-type: none"> • SDC strategy, vision and policy • SDC business operations and staffing • Executive communication 	<ul style="list-style-type: none"> • CTS Executive Management • OCIO • CAC • TSB • Executive Sponsor • Steering Committee • SDC Sr. Project Manager • SDC Program Support team • Enterprise Projects team • Service Owners

Table Two – Details Describing Project Roles			
Role	Description	Interests	Points of Coordination
Sr. Project Manager	<ul style="list-style-type: none"> • Monitors and reports overall SDC projects status • Oversees project work plans, issue and risk logs, and identifies interdependencies between tasks • Monitors and tracks project budgets, schedules, and quality against defined program objectives • Defines goals and objectives for the project consistent with executive decisions • Keeps the Executive Sponsor, Project Sponsor and Steering Committee informed of project progress • Identifies risks and issues and implements risk and issue mitigation strategies • Escalates issues to SDC Sponsors that cannot be solved at a lower level and may impact time, cost, or quality of the project • Facilitates and promotes internal and external stakeholder communications • Monitors the deliverable and milestone schedule • Determines project resource requirements and enlists stakeholder support to obtain these resources • Manages the deliverable review process to ensure the delivered solutions meet the goals and objectives of the agency • Oversees management of project library • Attends project meetings 	<ul style="list-style-type: none"> • Sr. Project management, including adherence to scope, schedule, and budget while managing risk, issue, and change. • Appropriate deployment and use of resources. • Project status and reporting • Any policy development necessary to successfully hand off between project and operations. • Customer agency input, success, and satisfaction 	<ul style="list-style-type: none"> • CTS Executive Management • OCIO • CAC • TSB • Executive Sponsor • Project Sponsor • Steering Committee • SDC Program Support team • Service Owners • Assigned Project Managers • Project Teams

Table Two – Details Describing Project Roles			
Role	Description	Interests	Points of Coordination
CTS Assistant Directors (ADs)	<ul style="list-style-type: none"> • Participates as a contributing member of the Project Steering Committee. • Provides functional resources in support of the project, balancing these assignments with the needs of sustaining activity of operational divisions. • Provides input into requirements, particularly as they relate to sustaining operations. • Ensures any divisional spending allocated in support of the project is in alignment with divisional budgets. • Acts as an escalation point for any function and/or division related issues. 	<ul style="list-style-type: none"> • Divisional business operations and staffing • Executive communication • Any policy development necessary to successfully hand off between project and operations. • Customer agency input, success, and satisfaction 	<ul style="list-style-type: none"> • CTS Executive Management • Executive Sponsor • Project Sponsor • Steering Committee • Service Owners • Assigned Project Managers • Project Teams
Service Owners	<ul style="list-style-type: none"> • Ensures involvement in appropriate tasks and on a timely basis • Manages staff responsible for the functional requirements, design, and verification activities • Manages day-to-day operational issues that arise • Coordinates the functional operations for the service • Manages service updates, security, and release management • Develops and manages statement of work documents • Ensures vendor and state contract compliance • Purchases and oversees installation of any required software to support the project • Provides operational support during project life cycle 	<ul style="list-style-type: none"> • Project strategy • Deployment and use of resources • Project progression • Policy development • Performance of Service offering • Customer agency satisfaction 	<ul style="list-style-type: none"> • Executive Sponsor • Steering Committee • SDC Sr. Project Manager • Service Owners • Client Liaison • Assigned Project Managers • Project Teams

Implementation Readiness Planning and Controls

Successful service implementations hinge on transparent, accurate and timely exchanges of information. Clearly defined readiness activities, as well as the identification and proper mitigation of risks, issues and actions, are critical. This section focuses on the primary readiness planning and control documents and processes that we will use to ensure a common understanding between CTS and the customer.

Preparation

Readiness Guides – The purpose of a readiness guides is to define the steps that each party will take to complete the work required for implementing the service offering. Tasks will be developed by the teams in accordance with the relevant business requirements. Some tasks will be completed by CTS, some by the customer, and some will be completed collaboratively. Multiple guides may be created to address particular phases (e.g. pre-cutover, cutover, and post-cutover).

Checklist - A readiness checklist summarizing the readiness tasks will be included in each guide. This checklist will be used during customer meetings as a tool to measure status and progress. Completion of all readiness tasks will be critical to a successful implementation. When all tasks are complete the Implementation Coordinator will submit a signed checklist to the CTS Client Liaison asserting the customer's readiness to proceed with implementation. Upon receipt the Assigned Project Manager will review and either a) validate readiness, or b) return the checklist for further work. After readiness is validated, CTS and the customer will proceed with final implementation activity.

End User documentation – When applicable, CTS will assist customers as they develop technical and best practice documentation focusing on training, testing and/or other appropriate information for use by end users. CTS will facilitate information sharing between agencies to maximize knowledge share. Such materials may range from technical testing plans, acceptance plans, and administrative guides solely intended for IT staff to broader training materials (e.g. service descriptions, overviews of features and functions, best practices, etc.) intended to assist customers as they prepare end users to use the new service(s).

Frequently Asked Questions (FAQs) – As we proceed with an implementation and begin to develop a common knowledge base, we may publish FAQs to promote this information. This will be more applicable to implementations that involve multiple customers or stakeholder groups. In the event that an implementation is more limited, the project teams may elect to use a more direct method of information sharing.

Collaboration

We will share information about project planning and status to address the needs of our customers to help ensure they are able to participate and benefit as desired. In addition to the publication of our documentation, we will meet with customers on a regular basis in multiple forums to share information.

Monthly SDC Projects Meeting – From a SDC Program perspective CTS will hold monthly meetings open to our customers and stakeholders alike. The intent of these sessions will be to provide current status on the SDC Program and current and planned implementations. In addition we will share any new information posted to our internet site and newsletter.

Project Meetings - The Client Liaison will work with both CTS teams and the customer's AIC to schedule recurring meetings to be held throughout each implementation. The major focus of these

meetings will be to ensure commitments are being met and actions are being coordinated. Meetings will most likely be weekly and supplemented with ad hoc communications (e.g. phone calls, emails, etc.) as needed. Depending on the meeting subject matter attendees will range from a limited group, such as the Client Liaison and the Assigned Project Managers, to a broader group including the full project teams. An agenda will be distributed prior to each meeting to allow each Assigned Project Manager the time to determine who should participate.

Controls

Each implementation will include use of the following control mechanisms to ensure that topics or concerns are addressed effectively and timely in a transparent environment:

Issues Log – The issue management process is designed to identify and resolve issues at both the individual team/work group level and at the implementation level. A central tracking and management log will be maintained by the CTS assigned Project Manager. This information will be reviewed regularly with the responsible individuals as well as in project team meetings.

Risk Log – The risk management process will focus on the capture and oversight of implementation-specific risks with sufficient detail to identify particular triggers and action items. Risks will be identified through discussion with all major stakeholders throughout the implementation and evaluated for their probability of occurrence and potential impact. A central tracking and management log will be maintained by the CTS assigned Project Manager. This information is reviewed regularly with the responsible individuals as well as in project team meetings.

Action Items Log – As the implementation teams begin meeting, they will identify new activities and assignments that support readiness activities. The Client Liaison will maintain and administer a central tracking log to ensure that all such items are captured, assigned and followed up on timely. This information will be reviewed and updated directly with the Implementation Coordinators regularly and with the project teams during each customer meeting.

Communication Plan

The Communication Plan sets a consistent framework for all the SDC projects and will serve as a guide for communications throughout the life of the projects. It will be updated as needs change. The plan includes:

A *Stakeholder Matrix* that maps all communication requirements (i.e. audience, priority, impact, frequency, and method)

Stakeholder	Priority	Potential Impact	Communication Frequency	Communication Method
CTS Director	H	B	AN	R; F; E; S
Executive Sponsor	H	B	AN	R; F; E; S
Project Sponsor	H	B	AN	R; F; E; S
Sr. Project Manager	H	B	AN	R; F; E; S
Steering Committee	H	B	S	R; P; F; E; S
OCIO IT Consultant	H	B	S	R; F; E; C; S; W
CTS Advisory Council	M	C	M	P; W
CTS Oversight Stakeholders (TSB, OFM)	M	C	AR	P; W
SDC Project Management Support Team	M	C	AN	R; F; E; S; W
Service Owners	M	C	AN	R; F; E; S; W
SDC Program Support	M	C	AN	R; F; E; S; W
SDC Project Teams	M	C	AN	R; F; E; S; W
Other Internal CTS Stakeholders	L	A	M	P; E; C; W
External Stakeholders (users/customers)	L	A	AN	P; C; W
Public	L	A	AR	P; C; W

KEY

Priority	Potential Impact	Communication Frequency	Communication Method
H = High M = Medium L = Low	A = Monitor (minimal effort) B = Work closely C = Keep informed	W = Weekly S = Semi-Monthly M = Monthly Q = Quarterly AN = As needed AR = As requested	R = Report F = Face to face/Meetings P = Presentations E = Email C = Phone calls S = SharePoint site W = Website

Stakeholder Definitions –provide a definition of stakeholders (includes related reporting requirements)

Stakeholder	Definition
CTS Director	CTS Director with overall responsibility for CTS management
Executive Sponsor	CTS Deputy Director with overall responsibility for CTS Operations
Project Sponsor	CTS Chief Technology Officer (CTO) with overall responsibility for the State Data Center operations
Sr. Project Manager	CTS Enterprise Projects Manager assigned to oversee the SDC projects by the Sponsors
Steering Committee	Includes CTS Executive Management, Service Owners, and the OCIO IT Consultant
OCIO IT Consultant	The OCIO IT Consultant is staff to the OCIO who is responsible for providing project management consultation and determining compliance with statewide IT policies
CTS Advisory Council	The CTS Advisory Council advises CTS Executive Management regarding the information technology priorities for the Consolidated Technology Services agency
CTS Oversight Stakeholders	The Technology Services Board advises the OCIO on Washington IT initiatives
Service Owners	CTS managers functionally responsible for each of the CTS services as assigned by the CTS Assistant Directors
SDC Project Management Support Team	SDC project management support will be provided by the CTS Enterprise Projects Team
SDC Program Support	SDC staff assigned to support the projects and operations of the SDC. This includes the SDC Architects and SDC Facilities
SDC Project Teams	Sub-project teams will be formed from each functional group within CTS and will be made up of the necessary project team members
Other Internal CTS Stakeholders	CTS employees who have an interest in the success or failure of this project
External Stakeholders	Any stakeholder not listed above that can be potentially impacted by the outcome of this project (i.e., CTS customers, other State agencies, Counties, Cities, etc.)
Public	The term “Public” refers to any individual who can be potentially impacted by the outcome of the project (i.e., customers of DSHS, WSP, DOL, etc.)

A Customer Membership Directory –includes a list of customers consuming services impacted by each of the SDC Projects.

Published Readiness materials – readiness documents supporting the projects will be published on the [Customer Readiness](#) page of the [SDC Projects](#) website.

Implementation of Communication Methods - The CTS Client Liaison will facilitate group and customer specific meetings, manage the creation of readiness materials, and develop the ad hoc communications described previously in this document.

Performance and Quality Metrics

Identifying, gathering, analyzing, performance and quality metrics play an important role in our ability to meet our customers' needs and our agency mission: *"We provide innovative technologies and support to our customers through competitive services that deliver measureable value."*

CTS will measure performance and quality on a regular basis throughout and immediately after implementations. Working directly with customers and stakeholders, we will seek input and obtain feedback on a regular basis. Tactically we will employ a variety of methods including the CTS Customer Advisory Council, direct written feedback forms/surveys, and individual interviews. All information gathered will be analyzed and used to further develop and improve our customer engagement processes.