The Integrated Service Delivery Strategy
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Before an organization should acquire the services of an outsource provider, they must take into consideration first defining their requirements, expectations, and metrics thoroughly through the use of a multi-tiered team structure who will support across functions. Once these issues have been addressed and documented, the organization, its IT services provider and support teams can judiciously take on the other factors, i.e., customer satisfaction, measurability, scalability, etc. A matter that is key, however, to a successful development strategy involving Integrated Service Delivery (ISD) is setting problems, scope, boundaries, and defining the expected deliverables through a job ticket.

Writing the Job Ticket – “The Ask”.

The successful development of an Integrated Service Delivery strategy begins and ends with a well-developed Job Ticket. There is no mystery to the Job Ticket, simply put it is the problem set, it sets the scope and boundaries, and defines the expected set of deliverables. The Job Ticket helps you to determine the skills mix of the team you will need to assemble, as well as, helps you to “chart the course” for the team. A well-crafted, clear, succinct Job Ticket will serve as a charter by which the team will measure its progress.

Let’s explore the components of a Job Ticket:

- Problem Statement
- Purpose / Statement of Deliverables
- Scope / Boundaries
- Team Definitions

**Problem Statement**

This is exactly what it suggests, it simply means to define the problem, and yet formulating a problem statement is not always easy. Do not be quick to “jump the gun” with what you think the problem is or you could be “spinning your wheels” treating what could turn out to be only a symptom. Do not also get caught in the trap of prematurely deciding the route cause, this too can lead you down a wrong path. It is important, however, to understand all of the symptoms, which are the manifestations of whatever the root causes may be.

For example, the graph below depicts sagging customer satisfaction, sagging LOS, and increasing costs with outsourced services:
Given that this graph is a representation of symptoms experienced from an outsource partnership, there might be a tendency to have the problem statement read:

“Our outsource partner cannot deliver the required customer satisfaction, level of service, and required cost targets necessary to support a globally distributed environment.”

It may not be immediately obvious, but this statement has a fundamental flaw. The way it is written implies a root cause, therefore, you may immediately focus your attention on potentially replacing your existing outsource partner, or on insourcing. These could both be very costly mistakes if your root causes lie in poorly defined requirements or a poorly defined portfolio of services. A more suitable problem statement might read:

“The current infrastructure supporting our globally distributed environment is experiencing trends of sagging service levels and rapidly increasing costs, both resulting in customer satisfaction woes.”

This statement makes no implications as to a root cause. It clearly defines the symptoms of the problem, keeping the focus fact based. You can see the importance of clearly understanding and defining the problem statement.

Purpose / Statement of Deliverables

The purpose / statement of deliverables should tie directly to, and actually be a function of, the problem statement. They not only convey the expectations of the management team, including time frames for delivery, but they also serve as a framework for the team. To illustrate the point it is best to look at the following example:

“The purpose of the team is to develop and provide alternatives to delivering an infrastructure that supports a globally distributed environment and provides a consistent and predictable level of service, increased customer satisfaction, and predictable and manageable costs. The final deliverable should be in the form of a proposal detailing each alternative, and have associated with it the relevant supporting facts, cost model, quality,
and delivery metric impacts. The initial draft is to be delivered 6 weeks from the start of the project.”

You can see from this example how the purpose is a direct function of the Problem Statement, and that the statement of deliverables is defined at a high level.

**Scope / Boundaries**

Boundaries serve multiple purposes. They provide a definition of scope and magnitude, and even more importantly, they define the limits of the team’s empowerment. The team needs to understand the limits of their empowerment to affect change. For example, your company might be under a sole source agreement with a 3rd party vendor regarding certain aspects of your data center. This would clearly be out of scope and therefore a boundary would be set to protect this agreement. Given this, it is important to note that it is not always enough to define what is in scope, it is equally important to define what specifically is not in scope.

Here is an example of a subset of scope/boundaries:

**In Scope**
- UNIX based servers, hardware, software, and associate applications set.
- LAN networks within the walls of the data center on which the servers reside.
- Client software that supports the server based application.
- Servers that reside in the Northeast Region.
- Production, Test, and Development environments and associated servers.

**Out of Scope**
- The Client itself and associated office productivity tools.
- The WAN outside of the data center.
- Mainframe servers and associated applications
- Application XYZ being supported by Vendor UVW.

**Team Definitions**

In order to ensure the involvement, buy in, and support across functions in the organization and across the corporation, it is important that a multi-tier team structure is put in place prior to the execution of the Job Ticket. The formation of the multi-tiered structure is essential to success.

**The Core Team**

These are “the doers”, the main team chartered to execute the Job Ticket. The team should be a small with broad yet diverse expertise. It’s make up should include members with the following skill sets: applications development and management, data base administration, system administration, infrastructure development and management, and facilities management. These skills represent the essential components for a complete Integrated
Service Delivery model and therefore must be represented to ensure the appropriate coverage. It has been our experience that flexibility, dynamics, and velocity are in direct relationship to the size of the team.

Support Team
The purpose of this team is really two-fold, to provide guidance and or a specific expertise to the core team, and to gain the buy-in of the middle management team through their involvement up front. Therefore, the team should be made up of those IT managers, who will be directly affected by the core team’s output. The thought here is that by putting them on the team it will force interaction, allowing for their input to be included, and gaining their buy-in early.

Extended Support Team (if applicable)
The formation of this team is really dependent on the size and structure of your company. Where it really adds value is when your IT Organization is organized by division with an overlying corporate IT. If this is the case, this should be a team from outside the direct divisional IT organization. It is crucial to pull these people in to gain an expanded perspective as well as for cross-corporate buy in.

Steering Committee / Decision Team
This is the team of direct decision-makers who ultimately have authority over whether or not the proposal you will be presenting will be approved. This is why gaining their buy-in early on in the project is so important.

Forming “The Core Team”
The formation of the core team is really a relatively straightforward process. It all begins with selecting the right project manager and staffing the rest of the team with skilled dedicated resources.

Find a Strong /Capable Project Manager.
As with any project, the strength and leadership of the project manager has a direct bearing on the success of the project team. Therefore, it is important that he or she possess certain core skills. First and foremost, for projects of this nature, it is important that the project manager be a “change agent”, a real tenacious proponent of change. This is a project with at times an insurmountable resistance to change, therefore is necessary for the project manager to possess the skills necessary to break down barriers and to drive a new way to approach things. Equally important is the project manager’s ability to build coalitions, influence and to sell. A team may have the greatest idea or approach, but if it can not be clearly articulated, packaged, and sold it will go nowhere.

Selecting the Members of the “Core Team”
Selecting the members of a team is normally a fairly uneventful task. Whoever is available or has the least amount “on their plate” is usually the obvious candidate for the team. However, given the importance of the task at hand, and given that the success of this team
will be directly influenced by the varying skills of its team members, it is imperative to select each team based on the skills profile described earlier. To recap, the team’s make up should include members with the following skill sets: applications development and management, data base administration, system administration, infrastructure development and management, and facilities management. Skill set is only one attribute to consider, equally important is attitude and delivery. As with the project manager, each team member must be an agent of change. They must possess a desire to deliver results amidst much skepticism and resistance to change.

Staff Team with Dedicated Resources

Being part of this project team should not be a part time job. Part time resources result in conflicting priorities, sporadic delivery, and continuous review and “level up” across the team. To achieve a consistent cohesive strategy delivered with velocity, dedicated resources are imperative to success. Therefore, if you do extract a resource from another project or assignment, you should relieve that person completely of their commitments to that project or assignment. Distractions will ultimately affect the team’s delivery in some fashion, whether it is through elongated delivery times, or worse, missed deliverables. If you cannot secure dedicated resources, then I would make the assertion that your management team does not see this project as a priority.

Empower the Work Group – Autonomy

If you are like most, when you hear the word empowerment you probably chuckle or roll your eyes, given that it has been a term often misused. The fact remains however that empowerment is key to the success of the team. You must, as a team, be given the latitude to define your approach and make the basic decisions necessary to deliver a cohesive and integrated solution, and that means being able to think out of the proverbial “box”. Where empowerment can fall short is when management forms a team of this nature and simply say “your empowered” and expects you to go forth and slay dragons in the name of progress. To truly get the most out of empowerment it is necessary to define the boundaries within the team must operate as well as communicate expectations. This all points back to the Job Ticket. In addition it is necessary to establish a communication plan which includes a support team and decision team review and feedback process. Frequent review and feedback will become the team’s critical factors for success. This will allow for quick feedback on decisions that the team made and the approach that the team is taking.

Charting the Approach

Restate the Problem Set

Given the importance of the problem statement, which serves as the “anchor point” of the entire project, it is necessary for the team to not only understand it but to be able to restate it in terms that do not easily allow for multiple interpretations. This is necessary for two main reasons. Firstly, it is critically important that each member of the team share a common understanding of the problem they are trying to address, and by working through the exercise of restating it, it provides a vehicle through which this can be accomplished. It
forces team leveling through interactive discussion of each member’s view of the problem. The other very important reason for restating the problem is to provide a detailed view of the problem in simple, straightforward terms, allowing for easy communication and little room for misunderstanding.

Let’s use our problem statement from above as an example of restating the problem statement:

“The current infrastructure supporting our globally distributed environment is experiencing trends of sagging service levels and rapidly increasing costs, both resulting in customer satisfaction woes.”

Restated, the problem set may look like this:

- Support personnel turnover is at 100%
- Server up time is at 82%, 17% below agreed to level of service
- Network up time is at 90%, 9% below agreed to level of service
- Portfolio of services limited and undocumented
- Service delivery inconsistent
- Ability to respond to new or changing requirements is not timely
- Workstation costs have increased 28% over the last 3 years
- Labor costs have increased 20% over the last 2 years
- Customer satisfaction surveys reflect a 68% satisfaction level, down 21% over the past 3 years

You can see that there is little room for interpretation as to what the “problems” are and where to focus.

Define the Scope

As with the Problem Statement, it is necessary to be clear about what is defined to be in and out of scope, therefore, using the scope and the boundaries defined in the “Job Ticket” as the guide, it is necessary to provide a very descriptive list. When defining the scope, you must also keep in mind any necessary time dependent requirements you may be under. For example, a third party contract may expire within a year, or you have a project that will be implemented in 18 months, therefore, you want to prioritize related requirements accordingly.

Depending on these types of “time related” dependencies, along with depth and breadth of the Job Ticket, it might be necessary to phase your deliverables. This is where Management’s expectation gets set, so you want to make sure your scope is not too broad that it is unachievable. Conversely, you want to ensure that it is not too narrow that you do not derive value from what you deliver. Remember the whole reason for your team’s existence is to deliver results, so keep the scope manageable.

Define your Work Process / Review and Feedback Loop

When we refer to work process we are really referring how the team will operate within itself and how it will operate with the support and decision teams. Where some teams of this
nature get into trouble is that they do not set up enough review and feedback sessions early enough. Frequent review and feedback will become the team’s critical factors for success. Metaphorically speaking each review and feedback session allows the team an opportunity to “right” or “steer” the ship to its final destination. Can you imagine if you were on a cross-country trip and you waited until you were only a mile away from your final destination before you asked for directions or consulted your map? Use the support and decision teams, as part of your tool set not as a gate or a milestone you must pass.

**Gain Buy-In Early**

Gaining buy-in early is something that is simple to accomplish and whose importance cannot be stressed enough. The actual sign off on the proposal should be, relatively speaking, a mere formality if you have successfully gained early buy-in. The real key is to involve the support and decision teams throughout the entire life cycle of the project.

When people think of involvement they usually think of e-mail. They feel that if they create a distribution list “DL” and mail their latest documents out to the world then they have done their job of keeping everyone “involved”. This is by no means the involvement referred to in this chapter. When we talk of “involvement” we refer to “bringing in”, “solicitation of feedback” and “over communication”. It is the team’s responsibility to physically “bring in” the support teams and the decision team. Call meetings, review facts and findings, and most importantly, “solicit feedback”. Draw upon the various team’s experiences and expertise, after all they have been put in place for this reason. Find ways to incorporate feedback into the team’s output. There is no better way to gain buy-in than to use someone’s input in the final output.

Lastly, do not be afraid to “over communicate”. When referring to “over communication”, it does not mean to inundate people with e-mail and voice mail. What it does refer to, however, is to schedule regular and frequent reviews of the team’s progress and outputs. This will ensure that you are on track from the support teams’ and decision team’s perspectives and will prevent you from potentially wasting a lot of time heading down the wrong path.

**Have Fun**

Some of the most fulfilling project experiences occur on small, dedicated, “task force type” teams operating within a well-defined scope. Therefore, work hard, stay focused, “bring in”, “solicit feedback”, “over communicate”, and HAVE FUN!

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