
*Enterprise-Level Define
Engagement Method, Draft 1*

prepared for

CLIENT

prepared by

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INTRODUCTION

This document describes the activity model for the Define Engagement method for the Professional Services organization. The Define Engagement method will be developed in several phases, of which this is the first. Subsequent phases will focus on refining the method, detailing the work products proposed within the method, and developing the guidance that supports the users of the method.

THE CONTEXT

Define Engagement is the initial step in the process by which ProServ conducts engagements with its clients. Figure 1 shows the current framework for ProServ’s deployment services. This framework is the context within which Define Engagement is executed. Define Engagement covers the 0.01 Scope Project method and a subset of the 0.02 Close project and 0.03 Define Requirements methods, all of which are depicted in the diagram.

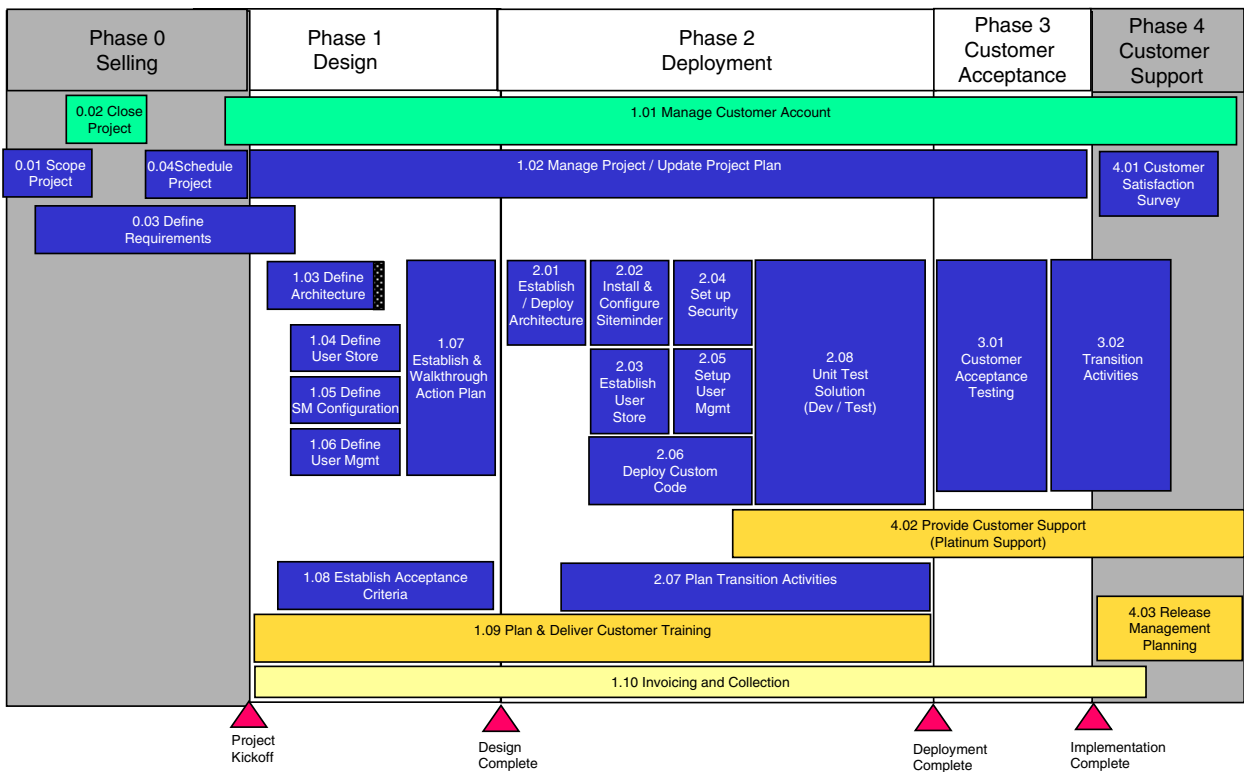


FIGURE 1. ProServ Deployment Services

THE ACTIVITY VIEW

This section presents the specifics of the activities of the Define Engagement method. Activities are units of work. Those covered here are the responsibility of the Engagement Manager. Work Products and Guidances associated with these activities will be identified, but will not be not elaborated upon in this document.

- Work products are the documents, models, deliverables and other artifacts that the Engagement Manager reviews, uses, or creates to do his or her job.
- Guidance includes those documents, checklists, questionnaires, and other aids the Engagement Manager may use in the completion of an activity or work product.

For information about the notation used for activity modeling see Appendix A.

Currently, the activity view of Define Engagement is refined to two levels:

- Top level (A-0 level)
- First level of activities comprising the Define Engagement activity (A0 level)

DEFINE ENGAGEMENT (ACTIVITY A-0)

Define Engagement is initiated when a qualified lead is identified to the ProServ organization. The activity produces three main outputs: a Statement of Work (SOW), a status report, and a project abstract. The Engagement Manager, using various forms of Guidance, is responsible for the activity.

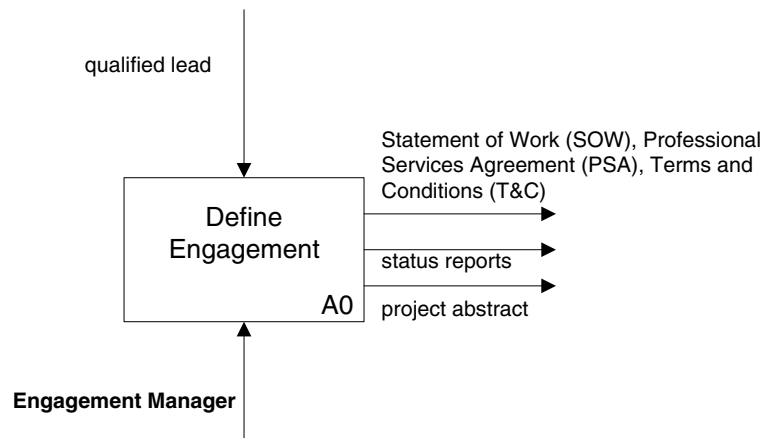


FIGURE 2. A-0: Define Engagement

The Activity View

The following tables in this section define and describe the elements shown in Figures 2 and 3. See Appendix A, which lists the rules for reading tables.

Statement of Work (Work Product)

Overview	Defines the contractual obligations with respect to this engagement.
Goal/Objective	To record the agreed-upon effort between client and ProServ.
Content	Cover page Scope Approach Schedule Deliverables Resource estimate
Produced By	A0 Define Engagement
Used By	ProServ/1.01, ProServ/1.02
Responsible Worker	Engagement Manager
Guidance	SOW templates Sample GE SSO SOW

Status Report (Work Product)

Overview	Provides ProServ management with status of the engagement.
Goal/Objective	To accurately portray status of engagement and raise issues/risks that require action.
Content	Project identifier Issues/risks and status Planned activity and status Summary of effort to date Project contact information and distribution
Produced By	A0 Define Engagement
Used By	ProServ/0.02, ProServ/1.02 (Figure 1)
Responsible Worker	Engagement Manager
Guidance	Status Report Sample

Project Abstract (Recommended Work Product)

Overview	Captures succinctly the characteristics of the engagement (project).
Goal/Objective	To capture the salient characteristics of the engagement for quick review by ProServ and other Client organizations.
Content	Project identifier Technical approach Project approach Resource estimate Reference to project requirements Project addendum
Produced By	A0 Define Engagement
Used By	ProServ/1.01, ProServ/1.02, ProServ/4.02 (Figure 1)
Responsible Worker	Engagement Manager
Guidance	Project Abstract Template (recommended)

DEFINE ENGAGEMENT (ACTIVITY A0)

This section identifies and describes the first level of activities comprising the Define Engagement activity. These activities are identified in the following diagram.

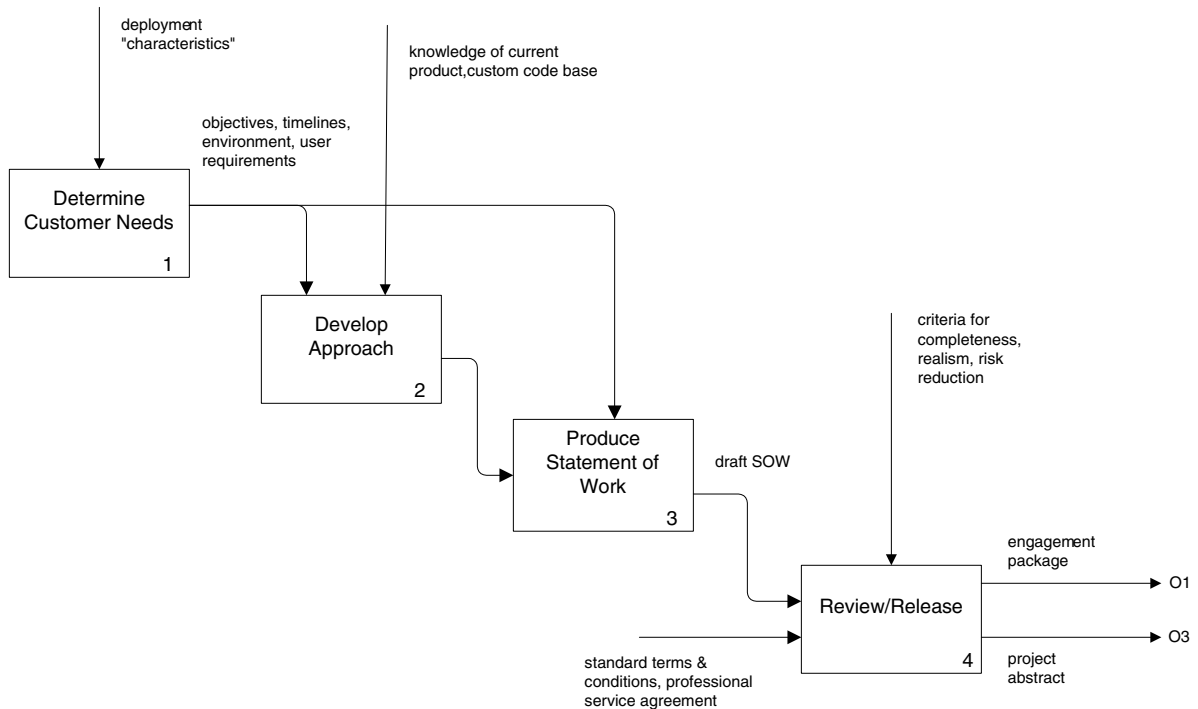


FIGURE 3. First level of Define Engagement activities

There are four primary activities that comprise the Define Engagement activity:

DETERMINE CUSTOMER NEEDS. Define Engagement begins with the identification of a qualified lead. The qualified lead is used by the Engagement Manager to establish the point of contact that will obtain between the customer and Client throughout the Define Engagement activity. Once contact is established, the Engagement Manager collects the information needed to understand the potential engagement.

DEVELOP APPROACH. Once the customer needs have been gathered, the approach for the engagement is developed. This process includes defining engagements that require specifying an architecture or developing custom software. In these cases, the entire Define Engagement activity may be executed (recursively) to establish the customer needs for these types of engagements.

The Activity View

PRODUCE STATEMENT OF WORK (SOW). This activity commits the decisions from the previous activity to the appropriate legal form.

REVIEW/RELEASE. This activity reviews the SOW and the project abstract for risk and completeness.

Each of the following tables details one of these activities.

Determine Customer Needs (Activity A0.1)

Context	A0 Define Engagement
Overview	The Engagement Manager gathers the engagement-relevant needs from the customer.
Prerequisites	A qualified lead has been identified.
Work Definition	Establish POC Determine objective Establish timeline Understand environment Understand user requirements Involves Define Requirements
Work Products	Customer needs analysis (recommended)
Milestones	Needs analysis completed
Performed By	Engagement Manager
Guidance	Customer Requirements Checklist

Develop Approach (Activity A0.2)

Context	A0 Define Engagement
Overview	This activity determines what type of engagement will be proposed to the customer. In performing this activity, the Engagement Manager may involve a number of Workers, including but not limited to the customer, technical support, ProServ architects and lead technical personnel, engineering, and sales.
Prerequisites	Completion of customer needs analysis
Work Definition	Classify project Develop technical approach Develop project approach Confirm approach with customer
Work Products	
Milestones	

Develop Approach (Activity A0.2)

Performed By	Engagement Manager
Guidance	<Technology_Name> product specification ProServ custom components specification (recommended) Engagement approach decision aid (recommended)

Note: We recommend discussion as to the type of Work Products and Milestones that the Develop Approach activity should have.

Produce Statement of Work (Activity A0.3)

Context	A0 Define Engagement
Overview	This activity commits the technical approach and the project approach to contract.
Prerequisites	
Work Definition	Complete the SOW.
Work Products	Draft SOW Estimated cost
Milestones	SOW draft complete
Performed by	Engagement Manager
Guidance	Customer success criteria SOW templates and samples Project database (recommended)

Note: We recommend discussion about the prerequisites for this activity, as these may be related to the work products in the preceding activity.

Review/Release (Activity A0.4)

Context	A0 Define Engagement
Overview	The Engagement Manager is responsible for presenting the SOW to the Delivery Manager for analysis and acceptance. The Delivery Manager assesses the technical and cost realism of the SOW, its completeness, and any potential risks. When the Delivery Manager signs off on these criteria, the Engagement Manager releases the SOW and issues a project abstract to ProServ, Customer Support, Sales, and other interested organizations.
Prerequisites	Draft SOW

The Activity View

Review/Release (Activity A0.4)

Work Definition	Analyze and identify risks Assess completeness Confirm technical and cost realism
Work Products	SOW with cost Project abstract
Milestones	SOW released
Performed by	Delivery Manager Engagement Manager
Guidance	ProServ Deployment Services framework Risk analysis profile (recommended)

APPENDIX A

ACTIVITY MODELING NOTATION

The diagrams in this document conform to the activity-modeling notation of SADT/IDEF0. In this notation, the activities are represented as boxes. Inputs (shown as arrows on the left side of a box) are transformed to outputs (right side) based on controlling information (top), using resources (bottom).

All boxes are numbered. A letter/number notation in the lower right-hand corner of a box indicates that there is additional information available and where to find it.

ACTIVITY LEGEND

The following terms and concepts are used to document the Define Engagement activity model.

List of Terms

Activity	Unit of work to be performed
Prerequisite	Entry condition for an activity, including any required inputs (work products)
Work Definition	Detailed description of an activity, possibly in terms of sub-activities or tasks to be carried out
Work Product	A document, model, or other artifact, created, consumed, or modified by an activity. A work product may be internal to ProServ, internal to Client, or a deliverable to a client.
Milestone	Exit condition on an activity, including any required outputs (work products)
Guidance	Techniques, methods, examples, templates, checklists, patterns, best practices to be used in the performance of an activity or the creation/use of a work product
Worker	A participant in a process (one or more activities) with the responsibility for producing one or more work products

Activity Template

<ActivityName>	Context: <Activity>
Overview	
Prerequisites	
Work Definition	
Work Products	
Milestones	
Performed By	<Worker>
Available Guidance	

Work Product Template

<WorkProductName>	Part Of:
Overview	
Goal/Objective	
Content	
Produced By	<Activity>
Used By	<Activities>
Responsible Worker	<Worker>