

CIP Foundation Service & Workshop Guide

Organization name

Version 1.1

CIP Foundation Service and Workshop Guide

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1. Foundation Service Description

1.1. Purpose

This service is designed to support IT-CMF users who have already begun a Capability Improvement Program (“CIP” or “CI Program”) in establishing an overall CIP Roadmap. The service serves as the “phase gate” for completion of **CIP Phase 1 – Discover** (CIP stages are outlined in Appendix 1). As such, the service follows immediately after completion of the user’s Initial Assessment. The purpose is to equip the user organization to formally establish the CIP, to build guiding change teams and to mobilise those teams to develop a portfolio of specific change initiatives to improve capability and performance.

The Foundation Service will largely comprise an action planning workshop, which will facilitate agreement on priority improvement areas and will provide preparation for the **CIP Phase 2 – Design**.

1.2. Service scope

The Foundation Service is offered at the overall Program level and not at the level of single improvement teams.

Service scope is for preparation, delivery and feedback on the CI Foundation workshop. The service does not include additional advisory support in planning, initiating or conducting CIP Phase 2 activities (Design phase).

Non-standard activities and service options (marked: (Option)) are deemed out of scope for the standard service, but can be provided and customized for additional fees.

1.3. Desired outcomes

- Acceptance of the Initial Assessment report Findings and Recommendations
- Agreement on priority Critical Capabilities/Themes for which action plans will be developed
- Definition of CIP organizational scope and scaling
- Confirmation of user CIP governance and leadership
- An initial roadmap for the overall CI Program
- Users equipped to deliver CIP activities in the Design Phase

1.4. Target audience

- Senior executives who have an interest in capability improvement and/or whose participation is essential politically to create and to sustain CI Program momentum.
- Key participants from the **Initial Survey**
- CI Program sponsors and potential CI Team leads from user organization
- CIP workshop facilitators
- IVI and IVI consortium-partner advisors

1.5. Service goals and deliverables

At the end of the workshop, participants will have a shared understanding of both their improvement priorities and the sequence of activities that they will undertake to develop a detailed execution roadmap. They will also have agreed the following:

1. **Agreement on the target Critical Capabilities for improvement** that will be assigned to internal CI Teams
2. **Initial CIP Roadmap** that outlines milestones, timescales and participants
3. **CIP governance, leadership, and team structure** necessary for roll-out of CIP
4. **Training requirements** for CIP participants
5. **Summary of workshop outcomes**

1.6. Value for the user

- External support in defining improvement priorities
- Tools and templates for accelerating the CI Program and action planning

1.7. Service components

Workshop

The primary component of the Foundation Service will be a one-day workshop, which will include preparation of materials made relevant to the individual client.

Advisory support (Option)

IVI Services (IVIS) and/or other IVI Partner advisors (IT-CMF certified) will provide additional and fully customizable advisory support, on request and for additional fees.

User participation

Pre-requisites

- User completes **CIP activity 1. Create Awareness** to create leadership and stakeholder understanding of capability management and CIP
- User completes **CIP activity 2. Complete Initial Assessment** to identify improvement priorities. This activity must be completed by an IVI-certified advisor (IVIS or Partner).

User actions

- Key user CIP stakeholders participate in a 1 day workshop led by IVI and/or IVI Partner advisor

2. Workshop Guide

2.1. Preparation

Workshop goals

- Define goals and agenda
- Agree in writing with client sponsor

Participant involvement

- Decide who should be involved and why
- Determine any participant preparation or education required; e.g. pre-read of Initial Assessment Report and on IT-CMF.

Workshop design

- Structure the workshop and facilitation approach to achieve agreed goals within available timescale
- Tailor workshop content to client/industry context and needs
- Share draft workshop presentation and/or workshop outline with client sponsor in advance; respond to feedback, and adjust if necessary

Workshop logistics

- Decide location and timing of workshop and book room with appropriate facilities
- Decide if need to cover multiple time-zones

2.2. Workshop outline

1. Introduction

- Overview / review of CIP process
- Introduce workshop outline, goals, and approach

2. Business/operational goals and outcomes

- Review and agree business goals and outcomes in the context of CIP implementation

3. Priority Critical Capabilities (CCs) for improvement

- Presentation/review of Initial Assessment Report
- Agreement on target themes and CCs for improvement
- Agreement on the change approach required to deliver on recommendations and improvements

4. Designing the Change Program

- Establishing urgency and vision
- Define program scope (including pilot options)
- Governance & leadership
- Teams and their role in designing change
- Structuring team activities, deliverables, and outcomes
- Project, program, and benefits planning
- Establishing an overall change portfolio

5. Establishing CIP governance, leadership, and team structure

- The importance of top-driven executive sponsorship and ownership
- Executive and overall CI Program sponsorship
- Overall CI Program leadership
- Capability / Theme owners (executive level)
- CI Team – sponsor, lead, team members, advisors
- Deciding knowledge, skills, and experience necessary for roles at all levels
- Determine gaps that require training & education
- Decide on the reporting mechanism and cadence for the CIP team; e.g. bi-weekly, monthly...

6. CI Team Action Planning Activities and Outcomes

- Follow-on assessments
- How to use POMS for improvement planning
- CC / Theme project design

7. Overall CIP Roadmap

- Develop an initial CIP roadmap based on agreed improvements, teams and timing

8. Training requirements

- Profile the knowledge, skills, and experience gap for both the CIP team and the wider organization and identify the types of training that will close these gaps.

2.3. Supporting artefacts

IVI/IVI Partner documents

- Initial Assessment Report
- POMS

CIP guides

Phase 1:

- Generic CIP Roadmap "At a Glance"
- CIP Introduction/Master Deck
- Guide to Assessment Selection
- Assessment Templates (full set for each type)

Phase 2:

- CIP Governance Guide
- Capability Improvement Teams & Roles
- CI Program Action Plan and Roadmap
- Benefits Realization Introduction
- Benefits Plan template
- Benefits Register template
- CIP Program, Project SOW
- CIP Program, Project Report

Revision History

Revision

Version	Filename	Description of Change	Author	Date
1.0	CIPv1.P1.A3.01.Foundation Service.docx	V1 Final	D. Trevitt / M. Porter	12/08/2015
1.1	CIPv1.P1.A3.01.v1.1.Founda tion Service.docx	Removed pricing	M. Porter	15/01/2016

Authorization

	Name	Signature	Date	Version
Prepared by:				
Reviewed by:				
Released by:				

Acceptance Signatures

Advisor Organization		Customer Organization
Name		
Date		
Signature		

Associated Documents

Title	Description	Version
CIPv1.P0.A0.00. Standard IVI CIP Artefact Template.docx	CIP document format template	V1.0

Appendices

Appendix 1: CIP roadmap and methodology

	DISCOVER	DESIGN	EXECUTE	EMBED
CIP Activities	<p>1. Create Awareness</p> <p>2. Complete Initial Assessment</p> <p>3. Conduct Capability Foundation Workshop</p>	<p>4. Establish CI Program</p> <p>5. Train Key Participants</p> <p>6. Mobilize CI Teams</p> <p>7. Conduct Mobilization Workshop</p>	<p>8. Execute CI Team Workplans</p> <p>9. Conduct Execution Review Workshop</p>	<p>10. Scale the CI Program as necessary</p> <p>11. Sustain improvements in the culture</p>
Deliverables	<p>1. Leadership understanding of 'Why CIP?'</p> <p>2. Problem/Direction Statement</p> <p>3. Improvement priorities and CIP establishment</p>	<p>4. Program Statement and Roadmap</p> <p>5. Understanding & commitment</p> <p>6. Change teams established, project workplans developed</p> <p>7. Overall Program Plan</p>	<p>8. Quick wins and practice improvements</p> <p>9. Program update and performance management</p>	<p>10. Program scaling plan</p> <p>11. Changes operationalized</p>
Supporting Templates	<ul style="list-style-type: none"> > Assessment Selection Guide > Guide to Completing Assessments > Assessment templates, spreadsheets, samples > Workshop Guide and templates 	<ul style="list-style-type: none"> > CIP Governance Guide > CIP Role Matrix > Program Plan template > Diagnostic assessment templates, spreadsheets, samples > Cascading Scorecard templates > Benefits Planning templates > CIP/PMO Guide > Workshop Guides and templates 	<ul style="list-style-type: none"> > Program/project management templates > CIP Performance Management Guide > Workshop Guides and templates 	<ul style="list-style-type: none"> > Guide to CIP Scaling > Continuous Improvement Guidelines > Benefits Harvesting templates