

CIP Mobilization Service & Workshop Guide

Organization name

Version 1.1

CIP Mobilization Service and Workshop Guide

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1. Mobilization Service Description

1.1. Purpose

This service is designed to support IT-CMF users' Capability Improvement (CI) Teams to effectively mobilize and initiate improvements that fully cohere with the CIP program statement for the organization. It serves as the "phase gate" for completion of **CIP Phase 2 – Design** and facilitates preparation for the Execution phase of CIP (CIP stages are outlined in Appendix 2).

The Mobilization Service is normally conducted in two stages, both of which have interactive team engagement in the form of a workshop:

- **Stage 1 – CI Team Mobilization: Developing the CC Improvement Portfolio**
- **Stage 2 – Program Mobilization: CIP Roadmap.**

In Stage 1, Capability Improvement (CI) Teams will be established and launched. The Mobilization Service will provide interactive team engagement through a Team Workshop. This workshop will address the micro issues of team development and the series of detailed team activities that will culminate in a Team-produced workplan and improvement roadmap for each Critical Capability (or for the overall improvement theme, if applicable).

The subject matter experts within the CI Teams will be provided with guidance, advice, and support from an IVI/IVI Partner advisor. This includes how best to apply the IT-CMF to identify and plan practice improvements (through follow-on assessments and POMs analysis) and the provision of independent advice where needed.

Note that Stage 1 is designed as a cross-Team activity, to facilitate kick-off for multiple CI Teams.

After CI Teams have completed the CC workplans, Stage 2 will largely comprise an overall CI Program roadmap development workshop, which will prioritize and coordinate the workplans of all CI Teams. Guidance will be provided on using the metrics and KPIs developed by CI Teams and developing cascading scorecards for monitoring and managing CIP implementation. This workshop will provide preparation for the **CIP Phase 3 – Execute**.

At the end of CIP Design, the organization will have a CIP program roadmap which will likely have multiple constituent CI Teams and project sets. Although each CI project will have its own goals, KPIs, plan and process, they must be aligned with the overall CIP program roadmap. Adoption of CIP enables each CI Team to consistently create its own roadmap and then implement the changes and actions that will have the desired impact operationally and strategically.

Every organization will be different and will operate in a specific context, having its own unique set of priorities, processes and methods. The key is that the advisor provides the support to achieve the target improvement goals and connect them to the overall program direction and goals.

1.2. Service scope

The user may opt for delivering Mobilization Service Stage 1 by themselves, with some or minimal advisory support. Our recommendation is to only choose this option if the Program Leads are fully trained and comfortable with the content as detailed in Section 2 of this document.

The Mobilization Service Stage 2 is not offered as a self-delivery service. It is typically offered at the overall Program level, but at the user's discretion can be delivered for one or more 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 3 activities (Execute 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

- Clarity amongst CI team members on how IT-CMF artefacts and IVI/IVI Partner Advisors can help them achieve their project goals
- External support to create and maintain momentum in developing each CC improvement portfolio
- Independent facilitation of the team development process enabling shorter time to productivity
- Establishment of each CI Team workplan into Team Projects, or Initiatives
- Coordination of all CI Team workplans and initiative sets into a comprehensive Program Roadmap
- Common understanding of the aggregate CIP roadmap
- Clarity around the organization's own resources available to support CIP

1.4. Target audience

- CI sponsors (both Executive and Program) and CI Team leads from user organization
- Capability Owners and Project Sponsors for Capabilities that are improvement targets
- CI Team members (subject matter experts (SMEs) and/or managers with direct responsibility and knowledge of the domains that are a priority for capability improvement)
- CIP workshop facilitators
- IVI and/or IVI consortium-partner advisors

1.5. Service deliverables

The mobilization service is normally a two stage process of interactive CI Team engagement including overall process mentoring structured around the following two workshops:

1. CI Team Mobilization: Developing the CC Improvement Portfolio

- **Purpose:** Ensure the CI team(s) have an executable plan for improvements.
- Notes from this workshop should form the basis for a full mobilization project statement and plan that the team agrees is executable.

2. Program Mobilization: CIP Roadmap

- **Purpose:** Establish overall CIP workplan and roadmap, ensuring that CI teams are empowered to execute their plan effectively, with barriers to their success removed.
- Notes from this workshop should form the basis for any revisions to the CI team's plans and actions and identifies a plan to remove any barriers to success identified during the team's success.

1.6. Value for the user

- High-performing CI Teams are established and indoctrinated into their Tasks Activities, and Processes
- CI Teams understand how to leverage CIP & IT-CMF for their specific projects
- CI Teams commit to their improvement plan and individual contributions
- CI Teams experiences early success relating to early project deliverables

- CI Teams has access to an independent, objective senior advisor

1.7. Service components

Knowledge Centre

Contact centre support from a senior IVI advisor and related admin support provides relevant access to IVI body of knowledge and enables correlation and analysis of assessment results.

Workshops

IVI/IVI Partner senior advisor leads the two workshops through key tasks in the CIP Design phase with a focus on mobilizing for success.

Advisory support

IVI and/or other IVI-Partner advisors (IT-CMF certified) will provide additional advisory support, as necessary.

2. Mobilization Stage 1 – CI Teams and CC Improvement Workplans

2.1. Preparation

Workshop goals

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

Participant involvement

- Decide who should be involved
- Determine any participant preparation or education required.

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

Team – Advisor Interactions

1. Each CI Team lead provides the IVI senior advisor with their relevant CIP artefacts and initial assessment results for review. (Note some organizations desire this stage 1 intervention at improvement team kick off stage, where the IVI senior advisor supports the launch and team forming stage; others prefer to have the team formed, and then engage the IVI senior advisor)
2. Senior advisor reviews artefacts and progress in the context of best practice with similar organizations.
3. Senior advisor interviews by video link 3-4 key team members this may be 1-1 or a group conference. The purpose of this conference is to assure general consensus on the current and target situation and scope the **CI Team Mobilization Workshop**.
4. Roles in leadership and facilitation of the workshop need to be defined, e.g.,
 - a. Team Lead owns and drives the workshop
 - b. IVI senior advisor acts as facilitator
 - c. Or IVI senior advisor leads the workshop and facilitates the outcomes.
5. Team Leader schedules the stage 1 workshop
6. Team members participate in a 1 day workshop
7. Senior advisor facilitates a review of the workshop outputs and agreed actions, which are summarised in writing following the workshop.
8. Team Lead and team members proceed to leads the project team and process in implementing the agreed outcomes. IVI senior advisor is kept up to date as a guest team member on progress.

2.2. Stage 1 Workshop Guide

1. Introduction

- Introduce workshop outline, goals, and approach
- Recap – Business drivers, improvement priorities, CI Program, governance and teams
- Overview of Design phase of CIP process

2. Building Capability Improvement Teams

- Orientation to teams and team processes
- Characteristics of effective teams
- Collaborative communication

3. CI Team Processes and Activities

- Team tasks, procedures, relationships
 - Key goals and KPIs for team
 - Roles and responsibilities
 - How the team will work
 - How progress will be measured and reported
- Working with IT-CMF and CIP artefacts
- Conducting follow-on assessment(s)
- Applying POMs for practice improvement
- Drafting CC improvement project(s)
- Workplans, budgets, KPIs

4. Overview of the CC Assessment Process

- Project planning and preparation
- Conducting a Survey
- Interviews
- Quantitative, qualitative analysis and maturity validation
- Practice improvement analysis
- Results and recommendations
- Action planning, benefits, and business case

5. Capability Building

- Clarify business drivers and performance targets
- Plan and execute assessment(s) as required
- Define priority CBBs for improvement
- Identify gaps in practices, process, structure, roles and skills
- Design the change in line with performance goals
- Plan skills and knowledge development actions
- Determine investment, leadership, and talent required for change
- Plan the change with a workplan and a roadmap

6. CI Team Workplan and Roadmap

- Preparing the project workplan and the benefits plan
- Capex and Opex estimation
- Define project metrics and KPIs

7. Preparing for Phase 3 – Execute

- Project management and coordination with PMO
- Management of change

2.3. Workshop artefacts

General guides

- Template PowerPoint guide
- Advisor evaluation guidance notes
- Standard awareness decks for relevant education agenda items
- Breakout session guide
- Relevant CIP artefacts

CIP guides

CIP 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

CIP Phase 3:

- Project Plan Checklist
- Project Weekly Status Report

3. Mobilization Stage 2 – CI Program Coordination and Roadmap

3.1. Preparation

Workshop goals

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

Participant involvement

- Decide who should be involved
- Determine any participant preparation or education required.

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

Program Lead – Advisor Interactions

1. CI Program Lead provides IVI senior advisor with relevant CIP artefacts from each CI Team.
2. Senior advisor reviews artefacts and progress and discusses progress to date and next steps with the CI Program Lead. The discussion is also focused on scoping the **Program Mobilization Workshop**.
3. Roles in leadership and facilitation of the workshop are to be defined.
4. CI Program Lead schedules the stage 2 workshop
5. CI Team leads (and optionally members) participate in the 1 day workshop
6. Post-workshop, the senior advisor facilitates a review of the workshop outputs and agreed actions, which are summarised in writing following the workshop.
7. CI Program Lead and CI Team Leads proceed with implementation of Program workplan and CI Team workplans. IVI senior advisor is kept up to date as a guest team member on progress.

3.2. Stage 2 Workshop guide

1. Introduction

- Introduce workshop outline, goals, and approach
- Recap – CIP Design phase
- Overview of Design phase of CIP process

2. Review Findings and Recommendations of Improvement Teams

- Each workgroup presents Design results, project plans, roadmaps

3. Prioritization of Cross-Team Practice Improvements

- Determine interdependencies among Team workplans

- Prioritization exercise
- Identifying skills gaps & incorporating into plan

4. Establishing the CIP Scorecard

- Defining program metrics and Critical Success Factors (CSFs)
- Defining CI Team scorecard requirements
- Creating cascading scorecards

5. Actions to Finalize CI Program Plan

- Updating overall CIP, including program statement and benefits plans
- Final CIP roadmap and agreement on deliverables
- Responsibility assignment
- Alignment process with strategy and budget – including business case development
- Socializing the final CIP

6. Preparing for Phase 3 – Execute

- Key learnings from Phase 2
- Coordination with other delivery bodies – PMO, VMO, etc.
- Project and program delivery
- Cascading scorecard management

3.3. Supporting artefacts

General guides

- Template PowerPoint guide
- Advisor evaluation guidance notes
- Standard awareness decks for relevant education agenda items
- Breakout session guide
- Relevant CIP artefacts

CIP guides

CIP Phase 2:

- CIP Governance Guide
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CIP Phase 3:

- Project Plan Checklist
- Project Weekly Status Report

Revision History

Revision

Version	Filename	Description of Change	Author	Date
1.0	CIPv1.P2.A7.01.Mobilization Service.docx	V1 Final	D. Trevitt, M. Porter	12/08/2015
1.1	CIPv1.P2.A7.01.v1.1.Mobilization Service.docx	Pricing removed	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: IT-CMF Education Products

Additional & optional IVI products may be relevant to some user scenarios. These are additional purchases.

Education Products

Additional & optional IVI products that may be relevant to some user scenarios. These are additional purchases.

- **IT-CMF Passport training (self-service or 1 day class)** – This course introduces participants to fundamental IT-CMF concepts, with a focus on the IT-CMF framework, the assessment process, and the maturity curve.
- **IT-CMF Core training (3 days)** – This course provides a broad overview of IT-CMF so that IT managers & professionals may begin to implement the framework in their organization. Topics include core IT-CMF concepts, macro capabilities, one Critical Capability (in detail), CC clusters, and the assessment process.
- **IT-CMF Assessor training (3 days)** – comprehensive course for users who wish to become IT-CMF practitioners (conducting assessments and leading CIP initiatives); requires significant professional experience in IT.

Appendix 2: 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