

# **CIP Execution Support Service & Workshop Guide**

**Organization name**

Version 1.1

# CIP Execution Support Service and Workshop Guide

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# 1. Execution Support Service Description

## 1.1. Purpose

This service is designed to support Capability Improvement (CI) Teams in the effective delivery of their CI and change goals as given in the CI Program Statement for the organization. It supports teams that have been through (Bruce Tuckman's) 'Forming', 'Storming' and 'Norming' team development phases during CIP Mobilization to become consistently high 'Performing'. It serves as a "phase review gate" for CIP Phase 3 – Execute, and facilitates preparation for **CIP Phase 4 – Embed** (Appendix 2 outlines CIP phases).

## 1.2. Service scope

The Execution Service is offered in two optional configurations:

- Program-level Execution Review Workshop
- Team-level Execution Review Workshop (single team)

Larger organizations with multiple CI Teams and program initiatives may wish to purchase several Execution Support Service packages for different CI Teams. Reasonable travel expenses and applicable taxes are charged in addition to the fixed price.

**Non-standard activities are deemed out of scope**, but can be provided for additional fees.

## 1.3. Service outline

### Service Prerequisites

Prior to conducting the Execution Review Workshop, key activities and tasks must be completed.

Each CI Team must complete the following:

- Complete execution of CI Team work-plan(s)
- Report and monitor progress on change and practice improvements using CI Team scorecards
- Identifies change obstacles and takes steps to reduce them
- Socializes changes internally and externally
- Conducts follow-up assessment(s) to measure progress toward achieving target(s)

The CI Program Lead must complete the following:

- Review and co-ordinate the execution of CI Team work-plans
- Report and monitor progress on change and practice improvements using CI Team and CI Program scorecards
- Identifies change obstacles and takes steps to reduce them
- Socializes changes internally and externally

Optional and customized IVI/IVI Partner support is available for any element of the prerequisites at additional cost. It is out-of-scope for the standard Execution Support Service.

During the Workshop, CI Program Plan implementation is reviewed:

- To learn and refine based on experience to date
- To identify visible business and operational performance improvement
- For CI program scaling requirements

At the end of CIP Execute phase, the organization will likely have performing CI Teams that have already delivered some quick CI wins and can advise on CIP scaling requirements.

#### **1.4. Desired outcomes**

- Delivery of CI Team projects to the performance goals set by the overall CI Program Plan
- A track-record of effective senior management sponsorship and leadership of CI Team
- Independent mentoring of CI teams, supporting how they address change issues that arise
- A motivated and performing CI Team
- General awareness of CI Program and its benefits within wider organization
- Progress towards target is measured using follow-up assessments
- Tangible evidence of early CI successes from the business; e.g. from the metrics within POMs

#### **1.5. 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)
- IVI and/or IVI consortium-partner advisors

#### **1.6. Service deliverables**

##### **Conduct CI Program Execution Review Workshop**

IVI senior advisor facilitates a workshop review of:

- Program reports and scorecard
- Visible business and operational performance impact
- Measured and targeted capability maturity
- Updated program and project statements, goals and KPIs for scaling
- Knowledge and skills for scaling

The workshop process shall ensure that key results are recorded in an accessible form. Workshop notes should inform and help justify the scaling of CIP and its embedding within the organization.

#### **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.

##### **Mentoring (option)**

IVI/IVI Partner senior advisor provides mentoring support for the Execute phase.

## **Workshops**

IVI/IVI Partner senior advisor leads the Program Execution Review workshop and can lead other workshops if required in Stage 1.

## **Advisory support (option)**

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

## 2. Conduct CIP Program Execution Review Workshop

### 2.1. Preparation

#### Workshop goals

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

#### Participant involvement

- CI project sponsor may lead this review.
- Decide who else should be involved and their role in the workshop; e.g. participant SME, facilitator.
- 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

### 2.2. Stage 2 Workshop guide

#### 1. Introduction

- Introduce workshop outline, goals, and approach
- Recap – CI Program Execution Support phase
- Overview of Execution Support phase of CIP process

#### 2. Review Progress of CI Teams and CI Performance

- Review of CI scorecard, results, project plans, benefits plan, benefits register and roadmaps with updates
- Review CI risks and challenges and how well they have been managed and could be managed better in the future
- Identify CI project successes and reasons for them; e.g. planned or just got lucky
- Identify CI project failures and reasons for them using root-cause analysis.
- Review results of post-implementation assessment compared to the original and to target maturity
- Decide on a communication strategy for CI results that will build support amongst key stakeholders and develop momentum within the wider organization.

#### 3. Preparing for Phase 4 – Embed

- Summarise key learnings from Execute Support Phase 3
- Develop an outline of CI scaling requirements and how this might build on existing CI work and organizational structures; e.g. PMO.
- Identify options and recommend how CI scorecards might be modified when CI is scaled across the organization; e.g. integration into wider IT/organization scorecards and performance management systems

- Identify options and recommend next IT-CMF assessments that should be considered within a scaled CI program based on current strategic priorities and CIP progress made.

## 2.3. Supporting artefacts

### General guides

- Workshop presentation template
- CIP Governance Guide
- CI Teams & Roles
- CI Program Action Plan and Roadmap
- CI Benefits Plan
- CI Benefits Register
- CIP Program, Project SOW
- CI Project Plan Checklist
- CI Project Weekly Status Report

### 3. Optional Support During Execute Phase

#### Key pre-requisites for the CI Program Execution Review Workshop:

- Participant skills development for change implementation; e.g. identifying and proactive management of change risks
- CI Team and CI Program scorecard management
- Ownership of CI project(s) by the business; e.g. explicit inclusion of CI project(s) within business manager role responsibilities and annual performance objectives
- CI Performance Improvements and KPI tracking
- Identifying and conducting follow-up assessment(s) to measure progress towards achieving CI targets

Optional and customized IVI/IVI Partner support is available for any aspect of the Execute phase at additional cost. Typically when this service is provided, an IVI/IVI Partner senior advisor provides mentoring support for CI implementation, including where applicable, client document review and training.

The organization's size, context and CI initiative scope combined with the CI Team's skill-mix and organization's track-record of successful delivery of other change initiatives, will typically determine the effort required for this stage.

#### Team Support – IVI/IVI Partner Advisor interactions (option)

1. Each CI Team lead provides the IVI senior advisor with their relevant CIP artefacts and initial assessment results for review. (Note: some of these client documents may already have been supplied in the Mobilization phase).
2. Senior advisor reviews relevant artefacts and progress in the context of best practice with similar organizations and discusses progress to date and next steps with the CI Program Lead.
3. Senior advisor participates in some CI Team progress review meetings via conference call or video link. These meetings might review CI Team and CI Program scorecards.
4. Senior advisor participates in CI team discussion on the identification of follow-up assessments to measure progress towards CI targets.
5. IVI senior advisor is kept up to date on progress of the post-implementation assessment as a guest team member. (Note: IVI/Partner can support the assessment, as required; this is a separate engagement to the Execution Service.)
6. Senior advisor supports and participates in CI Team implementation activities as requested if within agreed scope of execution support service; e.g. interview support; process change review.



## Revision History

### Revision

Version	Filename	Description of Change	Author	Date
1.0	P3.A9.01.Execution Service v1.docx	V1 Final	D. Trevitt, M. Porter	11/08/2015
1.1	P3.A9.01.v1.1.Execution Service v1.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
Standard IVI CIP Artefact Template v1.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 &amp; 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"> <li>&gt; Assessment Selection Guide</li> <li>&gt; Guide to Completing Assessments</li> <li>&gt; Assessment templates, spreadsheets, samples</li> <li>&gt; Workshop Guide and templates</li> </ul>	<ul style="list-style-type: none"> <li>&gt; CIP Governance Guide</li> <li>&gt; CIP Role Matrix</li> <li>&gt; Program Plan template</li> <li>&gt; Diagnostic assessment templates, spreadsheets, samples</li> <li>&gt; Cascading Scorecard templates</li> <li>&gt; Benefits Planning templates</li> <li>&gt; CIP/PMO Guide</li> <li>&gt; Workshop Guides and templates</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Program/project management templates</li> <li>&gt; CIP Performance Management Guide</li> <li>&gt; Workshop Guides and templates</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Guide to CIP Scaling</li> <li>&gt; Continuous Improvement Guidelines</li> <li>&gt; Benefits Harvesting templates</li> </ul>