

User Life Cycle Management

**USER LIFECYCLE MANAGEMENT: GOVERNERING METHODOLOGY**

User Life Cycle Management

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## User Life Cycle Management

### Introduction

This document is a compilation of processes and procedural methodologies intended to be used for the creation, deployment and maintenance of a User Lifecycle Management Methodology implementation. This document offers a detailed tutorial defining the management of the 5 Frameworks that make up the User Lifecycle Management Methodology.

One major internal challenge corporations are facing today is the ability to obtain, deploy, manage, and reclaim assets; including software licensing, hardware, User ID's, employee credentials and/ or any critical data or asset necessary to introduce and maintain corporate human capital. Today, the maintenance of this data is not just "an internal challenge" to corporations but rather a requirement. Today, thousands of public facing companies are tasked to ensure their accounting and business operations are in compliance with the Sarbanes Oxley Act (now under the 2004 revision). Now, Financial Auditing departments must not only provide a comprehensive external financial audit but they are also subject to a Sarbanes-Oxley compliance specialist audit to identify areas of operational risk. Private companies face the same requirements by public facing corporate clients, vendors and business associations. This document speaks to the process methodology that manages the design, implementation and delivery of *User Lifecycle Management*.

### What is User Lifecycle Management?

*User Lifecycle Management* (ULM) is the implementation of a strategic solution that will enable the enterprise management of ***One User. One Identity. One Infrastructure.*** Tasked with a common set of business and technology data management regulations and requirements, many corporations or enterprises are looking to implement a strategy for ***User Lifecycle Management***. Solutions to a successful strategy must contain two key elements:

- Developing a common infrastructure from which the various components of the User Lifecycle Management solution can be launched, centrally configured, managed and reported.
- Replacing multiple online identities with a single, secure, trusted and efficiently managed credential for each user.

*User Lifecycle Management* can be broken down into 5 distinct Frameworks:

### Directory Services

*Directory Services* is defined as a software application — or a set of applications — that stores and organizes information about a computer network's users and network shares, and that allows network administrators to manage users' access to the shares. Additionally, directory services act as an abstraction layer between users and shared resources.

### OS / Application Standardization

*OS/ Application Standardization* is defined as a standard enterprise operating system integrated into a single image that can be deployed to all PC's spanning multiple hardware profiles accompanied by a collection of software installations and selected Group Policies. Once installed, the OS and packaged applications are protected by "self-healing" technology natively integrated if suddenly altered, overwritten or damaged.

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**Security**

*Security* is defined as a defined set of processes and integrated technology centrally deployed and managed to protect and enhance end user devices.

**Asset Management**

*Asset Management* is defined as a business discipline for managing the life cycle of assets to achieve a desired service level while mitigating risk. It encompasses management, financial, customer, engineering and other business processes. True asset management is not a system you can buy, but is instead a business discipline enabled by people, process, data, and technology.

**Audit and Compliance**

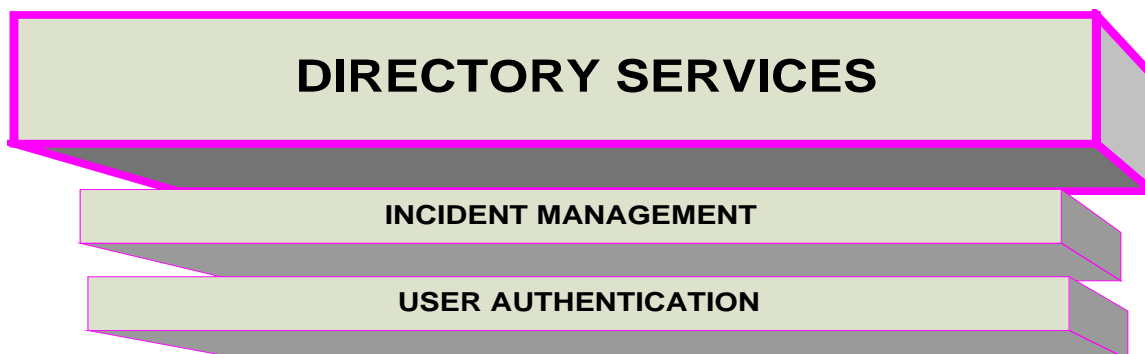
*Audit and Compliance* is defined as a comprehensive, systematic, documented evaluation that is designed to find and fix operational and financial violations for companies and individuals. It includes not only a compliance review, but regular reporting requirements and schedules for correcting problem areas discovered during the audit.

**User Lifecycle Management: Understanding the Functional Components of the 5 Frameworks**

Each Management Framework is comprised of several overlapping “Functional Components”. The components are Control Functions and process that serve as the backbone for the individual Frameworks. The Functional Components can be found in more than one Framework and do operate as both independent and co-dependent process to service their specific Framework(s). Below we have defined the Functional Components for each of the 5 Frameworks:

**Directory Services**

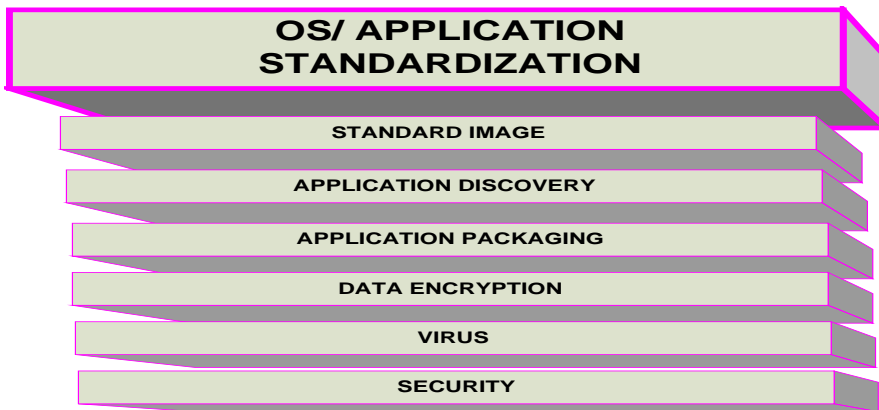
- ❖ **Incident Management-** Pinpoints and tracks the source of technical or operational incidents, allowing your service desk to correct issues quickly. Association of user ids through Directory service ties the incident history to the user.
- ❖ **User Authentication-** The process of determining whether someone or something is, in fact, who or what it is declared to be.



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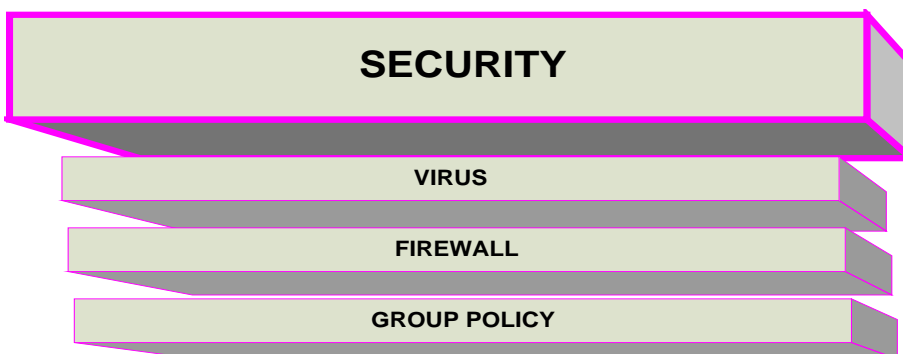
**OS / Application Standardization**

- ❖ **Standard Image**- One image (or OS) for the entire enterprise
- ❖ **Application Discovery**- Identification, approval and certification of all business applications running within the enterprise
- ❖ **Application Packaging**- Configuration of application media into an MSI (Microsoft Installer) package
- ❖ **Data Encryption**- The cipher encryption of business critical user data for the purpose of keeping it confidential or private.
- ❖ **Virus**- Desktop utility to eliminate or mitigate external and/ or internal virus or Malware threats
- ❖ **Security**- Implementation of security controls to mitigate internal and external threats to critical data and business systems



**Security**

- ❖ **Virus**-Desktop utility to eliminate or mitigate external and/ or internal virus or Malware threats
- ❖ **Firewall**- Gateway that limits access between networks in accordance with local security policy
- ❖ **Group Policy**- Server based applied setting to a user or computer that can manage the behavior and/or access to a device



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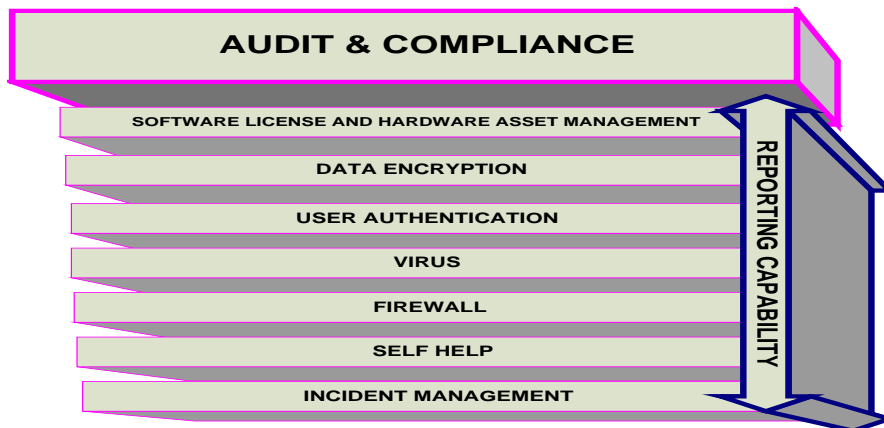
**Asset Management**

- ❖ **Hardware Management** - The tracking and maintenance of all requisitions, purchases, procurement and reclamation for hardware
- ❖ **Software Management** - The tracking and maintenance of all requisitions, purchases, procurement and reclamation for software



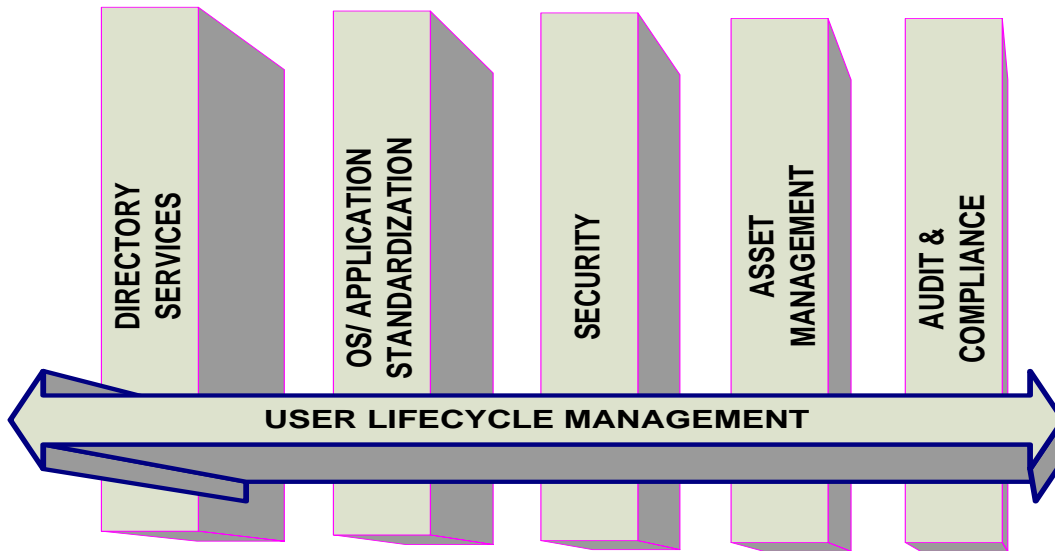
**Audit and Compliance**

- ❖ **License and Asset Management**- Reporting on Asset and license min max numbers, warranty expiration, amortization cycles, inventory counts, etc.
- ❖ **Data Encryption**- Reporting and tractability of cipher encryption function of business critical user data
- ❖ **Virus**- Reporting and tractability of desktop utility function and mitigation of external and/ or internal virus or Malware threats
- ❖ **Firewall**- Tracking on functionality of user access between networks in accordance with local security policy
- ❖ **Self Help**- The capability to report the metrics of provisioned tools and process to the user base to troubleshoot and solve technical issues
- ❖ **Incident Management**- Reporting and tracking of source data for technical or operational incidents (including service desk responses, SLA status and incident metrics).
- ❖ **User Authentication**- Tracking authentication accuracy and metrics, user logon history, termination and new hire access, etc.



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## The Project Management Controls for Managing the Framework



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## **Project Management and Governance**

The Project Management and Governance Framework utilizes a distributed team approach to project management which improves accountability and allows for a greater degree of scalability - from small projects to very large, complex projects. To maximize the success of Information Technology projects this framework offers a packaged guidance model based on effective envisioning, design, development, deployment, and operational support processes supporting successful business solutions.

Delivering a business solution on-time and within budget requires a proven approach. With this understanding this methodology/ process has been crafted based on lessons-learned from over 20 years of combined business and IT project related experience within large-scale organizational development, business best practice, and service operation projects. This methodology/ process provide proven practices for planning, designing, developing and deploying successful IT business solutions. It also provides a flexible and scalable framework to meet the needs of any size organization or project team. Project guidance consists of principles, models, and disciplines for managing people, processes, finances, technology elements and the variables that most projects encounter.

One of the notable characteristics of this methodology is the use of a role or job title - Project Manager. This methodology/ process attaches great importance to the project management discipline and competencies but understands the greater need for a team supported framework comprised of multiple functional disciplines pertinent to the success of the project deliverable. The methodologies foundation and principles lead to very distinctive concepts and practices in how project management impacts project deliverables. It also describes how the Program Management role provides the specialist project management skills to support the full team and describes how typical project management activities are distributed across the project team. This methodology demonstrates the principles of its approach when and where responsibility for project management is distributed to a team lead and disseminated throughout the rest of the team's subject matter experts. This methodology provides an approach which is based on facilitation and coaching, rather than imposing control on the rest of the team.

## **Project Methodology: Clear Accountability + Shared Responsibility = Optimal Organizational Dynamics**

The Project Team Model is based on the premise that each role presents a unique perspective on the project and that no single individual can successfully represent all of the quality goals of all the roles. Yet the customer needs an authoritative single source of information on project status, actions and current issues. Within the team, each role is accountable for the activities necessary to achieve his/her own quality goal. Each team member is responsible for the overall success of the project and quality of the solution and is expected to contribute ideas and observations based on their knowledge even in areas for which they are not personally accountable. Specifically, the project team roles share responsibility for many aspects of project management, such as risk management, time management, quality management, planning, scheduling, team recruitment, and human resource management as it pertains to their specific knowledge discipline.



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The project team, members are empowered to deliver their own commitments and have confidence when depending on other individuals - tasks will be completed. Any delays or change are reported to the project leader as soon as possible. Once they are confident that delays will be reported as soon as they are known, team leads can provide a more facilitative role, helping team members assess their true position while offering guidance and assistance to them. Progress monitoring is distributed across the team and becomes a supportive rather than a policing role.

## Project Disciplines

The Project Manager or Program manager should recognize several areas of non-technology expertise that are important competencies to all the roles in the team model. Currently, this methodology addresses four primary disciplines with the understanding that there are sub-disciplines within the framework. These are ***project governance, project management, risk management and readiness management***. This project methodology has developed best practices within these disciplines that are well established across many business verticals and industries, not merely Information Technology (IT). Often these practices can be applied to IT operations and other business processes as well as IT projects. Rather than reinvent these practices, we summarize what project teams need to know in these disciplines and add insights gained by project team members over past experiences.

## Project Governance Definitions

IT Governance is defined as the rules and regulations under which an IT department functions. It is a mechanism, put in place to ensure compliance with those rules and regulations. The IT organization supports the growth and maintenance of the business organization.

We define Project Management and Governance as a subset of IT Governance. Project Management Governance is the rules and regulations under which an IT project functions to support the business case. As with IT Governance, Project Management and Governance covers the mechanisms put in place to ensure compliance with best practice standards.

User Lifecycle Management's Project Framework defines Project Governance as the recognition, implementation and adherence to a predetermined standard or criterion to which processes and systems exist to support the successful growth and maintenance of a given organization. Project Governance, in part, is made up of critical project based dependencies or a sub-framework of its own. The dependencies that make up the Project Governance sub-framework are as follows:

### **Definition of Roles and Responsibilities**

The starting point to define governance is to define the role and responsibilities of the IT area as it relates to the business objective. "Role" is defined as a person who is the one accountable for the way the organization is structured, how it operates, and how the results are quantified. "Responsibilities" suggests the role must be doing something. The "doing something" implies there is a methodology or process for doing whatever needs to be done to satisfy the business objective.

At the IT department level, there should be a definition of each area's responsibility. When the structure is summarized, the definition will cover the responsibilities of the IT area as a whole. By defining and

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summarizing the individual department roles and responsibilities, it will become clear where operational gaps exist, or which activities outside the scope of IT are impacting the IT operation.

Generally, it's a good principle to only have one person accountable for a department's operational result; in defining governance this is not always practical. Organizational structures change and evolve. People come and go. For the purpose of defining governance, it is sometimes better to define at a group or departmental level.

### **Definition of External Responsibilities**

Organizations or departments outside of IT (that are engaged in the project) are also held to the same rules of Project Governance. Users have an obligation to provide business requirements, standards and expectations for a new system. The requesting business organization is responsible to define requirements such as business use, required output, costs allocation, maintenance, etc.

### **Definition of Operational Methodologies**

Operational Methodologies are the standard processes or methodologies the organization has adopted in order to meet the technological needs of the business organization and their objectives. In order to create a governance framework, there must be some understanding and documentation of operational procedures (example: how the organization maintains its workstation environment, employs contractors, purchases hardware, charges customers, etc). All these should be visible in the roles and responsibilities of the area, and need to be documented at some level. Operational Methodologies ensures a proper business process model has been created and the governance can refer to that model.

### **Definition of Development Methodologies**

Development Methodology governance covers the evaluation of ideas, justification, approval, and prioritization of projects (most individuals believe the development cycle begins when the project starts). This is where considerable grey area usually exists between business and IT. An agreed process is critical. Development requires the inclusion of certain areas in the governance of project related development methodologies (example: the existence and use of a standard project methodology, QA methodology, and client approval process). Compliance with these examples form part of project governance and are captured with the use of particular techniques, language and architecture specific to the project governance.

### **Definition of Release and Change Management Methodologies**

This process implements IT best practice Change Management techniques. These solutions are well structured and are an integral component of project governance.

### **Definition of Tools**

This process employs the use of an inventory of specific technical tools to discover, implement and deploy some of Five Frameworks. Toolsets include but is not limited to tools for Application Discovery, MSI Packaging, Image Building, Application Deployment, Database Tools, Scripting Tools, Software Development Tools, Modeling Tools, etc. Project Governance dictates which tools to use within each client organization.

### **Forums**

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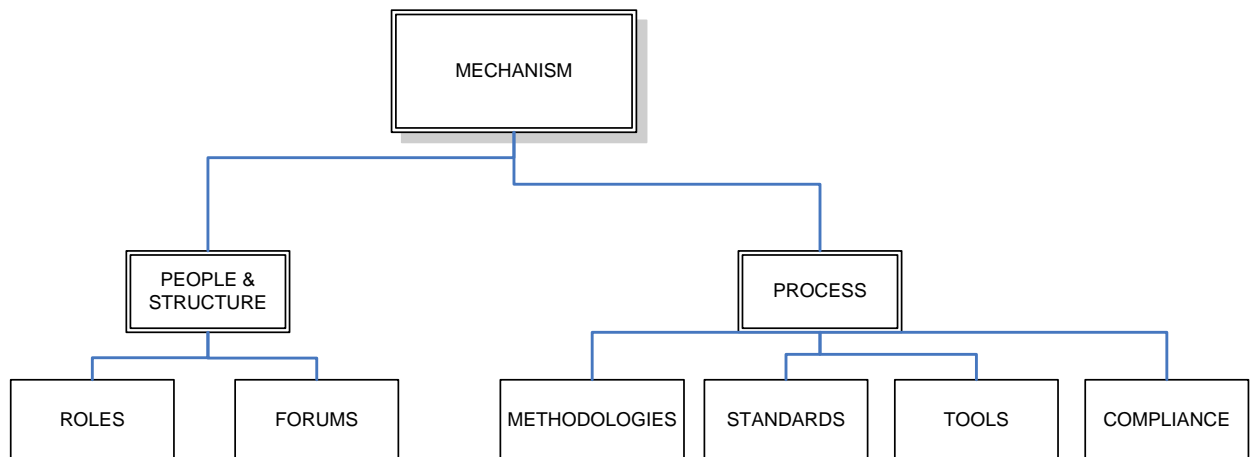
Forums takes into account the people dimension and communication processes of a given organization. How do people talk over the IT fence? A large component of Project Governance necessitates the establishment of formal communication forums whereby interaction can be facilitated throughout the course of the project. These forums may be manifested in the formation of a project-based Business/IT committee, Group IT Steering Committee, User Forums, User Groups, and Quality Groups etc. The creation and implementation of project forums with clear objectives enhances the project's results.

### Definition of Standards

Standards examine existing cultural and industry standards for project delivery. There are usually standards within each organization - complying with these standards becomes part of the project governance procedure. This helps to associate the project initiative to the existing client culture. It also drives the development of new cultural standards. If they do not exist, governance will identify the lack of suitable standards in a particular area and we will work with the client to set and implement those standards.

### Definition for Compliance Mechanism

Governance Compliance refers to the assurance that project standards or procedures are followed. This process has instilled project related mechanisms to escalate and encourage regular project compliance on milestone deliverables and next step approvals. This process uses a formal IT Audit reporting function within its Project Management methodology to evoke periodic milestone reviews. The following model defines the structure of Project Governance methodology.



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Component	Governance applies through
Roles	<ul style="list-style-type: none"> <li>• Defined responsibilities</li> <li>• Accountability</li> </ul>
Forums	<ul style="list-style-type: none"> <li>• Purpose of each forum or communication tool</li> <li>• Authority to make decisions</li> <li>• Participants who should contribute</li> </ul>
Methodologies	<ul style="list-style-type: none"> <li>• Compliance with standard processes</li> <li>• Use of standard documentation</li> </ul>
Standards	<ul style="list-style-type: none"> <li>• Reference documents for the consistent use of IT</li> </ul>
Tools	<ul style="list-style-type: none"> <li>• Tools to support projects</li> <li>• Tools to support operational areas</li> </ul>
Compliance	<ul style="list-style-type: none"> <li>• Collection and analysis of metrics</li> <li>• Audits of projects</li> </ul>

**Project Governance Results**

- Standardized process and procedures to better manage the IT environment
- Maximize return on IT investment
- More effective IT resulting from a closer alignment with the business
- Alignment with corporate objectives
- Consistency with IT Strategy & Policy
- Accountability and transparency in decision making that impact on IT

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**Project Management**

A "project" is defined as a temporary endeavor undertaken to create a unique product or service. Temporary means that the project has an end date. Unique means that the project's end result is different than the results of other functions of the organization. We define project management as an area of knowledge, skills, tools and techniques used to achieve project objectives within agreed upon parameters of quality, cost, schedule and constraints. In some companies, the term program is used to describe groups of projects that are coordinated together. To avoid confusion with the MSF team role cluster called program management, a group of projects is referred to as a project portfolio. MSF categorizes the following areas of project management responsibilities, skills and activities.

1. **Project Planning / Tracking / Change Control**
  - Integrating and synchronizing project plans
  - Setting up procedures and systems for managing and tracking change
  
2. **Scope Management**
  - Defining
  - Breaking down scope of work (project scope)
  - Managing project tradeoffs
  
3. **Schedule Management**
  - Generating schedules from team estimates
  - Task sequencing
  - Matching resources to tasks
  - Applying statistical techniques
  - Schedule maintenance
  
4. **Cost Management**
  - Preparing cost estimates based on team time estimates
  - Progress reporting and analysis
  - Analyzing cost risk
  - Value analysis
  
5. **Staff Resource Management**
  - Resource planning
  - Team building
  - Conflict resolution
  - Skills readiness planning (for project)
  
6. **Communications Management**
  - Communication planning (team, customer/sponsor, users, stakeholders)
  - Project status reporting
  
7. **Risk Management**
  - Facilitating
  - Driving team risk management process
  - Maintaining risk documentation
  
8. **Procurement**

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- Soliciting contractor bids for services and/or hardware/software'
- Preparing requests for proposals (RFP's)
- Managing vendors or subcontractors
- Managing and negotiating contracts & agreements
- Opening purchase orders and approving invoices

9. **Quality Management**

- Quality planning
- Determining which standards to use
- Documenting quality criteria and quality measurement processes

*Project Management* is always used to refer to the specific set of knowledge and skill areas listed above, not a role or job title. The term *project manager* will be used describe someone who is a specialist at project management.

**Project Management and User Lifecycle Management Specific Processes**

In general, project management consists of knowledge areas and techniques that broadly apply to any industry area that sponsors project related work. Each industry area (i.e. aerospace, construction, IT, etc.) has specific processes, phases, roles, and practices that work best for that industry. In order to have successful projects, these specific processes must be supplemented with generic project management practices.

This methodology provides processes and recommended practices combining best practice IT/ business project management combined with best practice process management and leveraged technology solutions. Its relationship to the discipline of project management and technology solutions is illustrated in Figure 1.

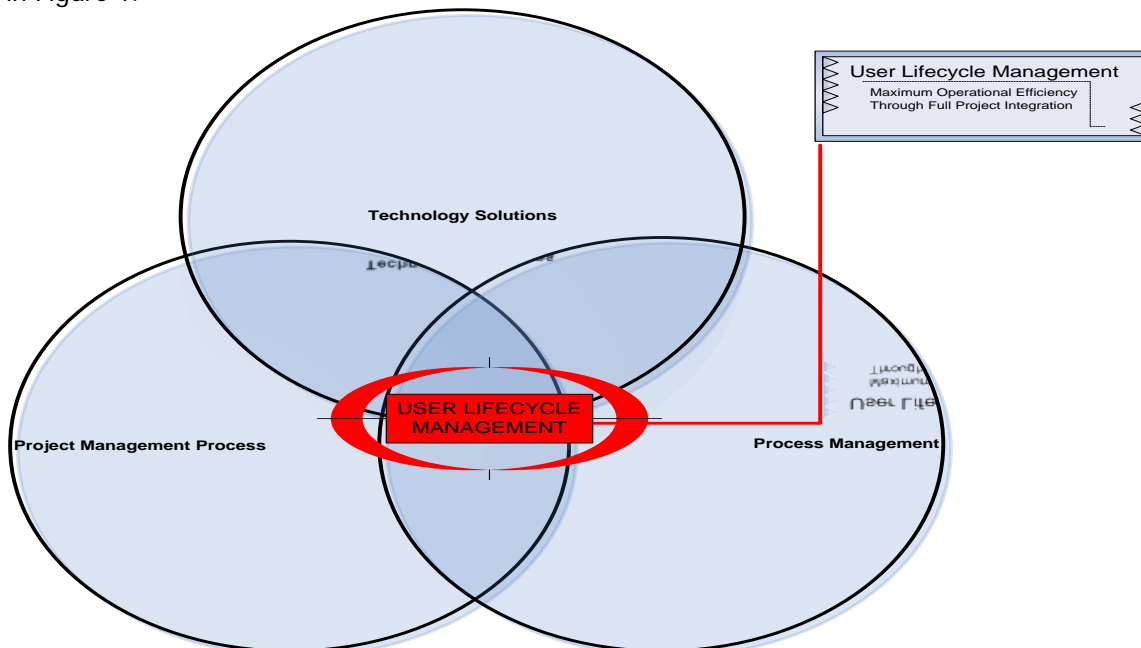


Figure 1 - Relationship and integration of this methodology to generic Project Management disciplines & Technology Solutions

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### **Characteristics of Project Management**

Three distinctive characteristics of this methodology/ process approach are stated here and discussed in greater detail below:

1. Most of the responsibilities of the project manager role are encompassed in the program management role cluster in smaller projects
2. In larger projects requiring scaled up teams, project management activities occur at multiple levels
3. Some large or complex projects require a specialist project manager or project management team

### **Project Manager Role Is Encompassed in Program Management**

The program management role cluster includes the functional responsibility areas shown below. In smaller projects, all the functional responsibilities are typically handled by a single program manager. As the size and complexity of a project grows, this role cluster is broken out into two branches of specialization: one dealing with architecture and specifications and the other dealing with project management.

### **How Program Management Works with Team Leads and Sub-Teams**

To understand how project management works, it is necessary to understand how the team model scales up, conducts planning, communicates, and makes decisions. Exactly how project management is distributed depends in large part on the scale and complexity of the project. This is a highly-scalable framework, which can be used for small projects involving two to three people, to very large projects. Much of the scalability comes from the team model. The team model scales up in two primary ways:

1. By abstracting project management related Sub-Team roles as a set of functional responsibilities (by Framework), rather than specific job descriptions the responsibilities of each role are not tied to the limits of a single person. A role can be expanded into clusters of roles, each specializing in a more targeted set of responsibilities, which is based on the evolution of User Lifecycle Managements 5 Frameworks. One or more individuals can fill these more specialized roles.
2. Using project Sub-Teams well versed in the design and implementation of the User Lifecycle Management Frameworks, in various combinations, to create any number of scalable large team structures creates a better understanding for the inner dependencies of the Frameworks and streamlines project costs. Sub-Teams and functions are described below.

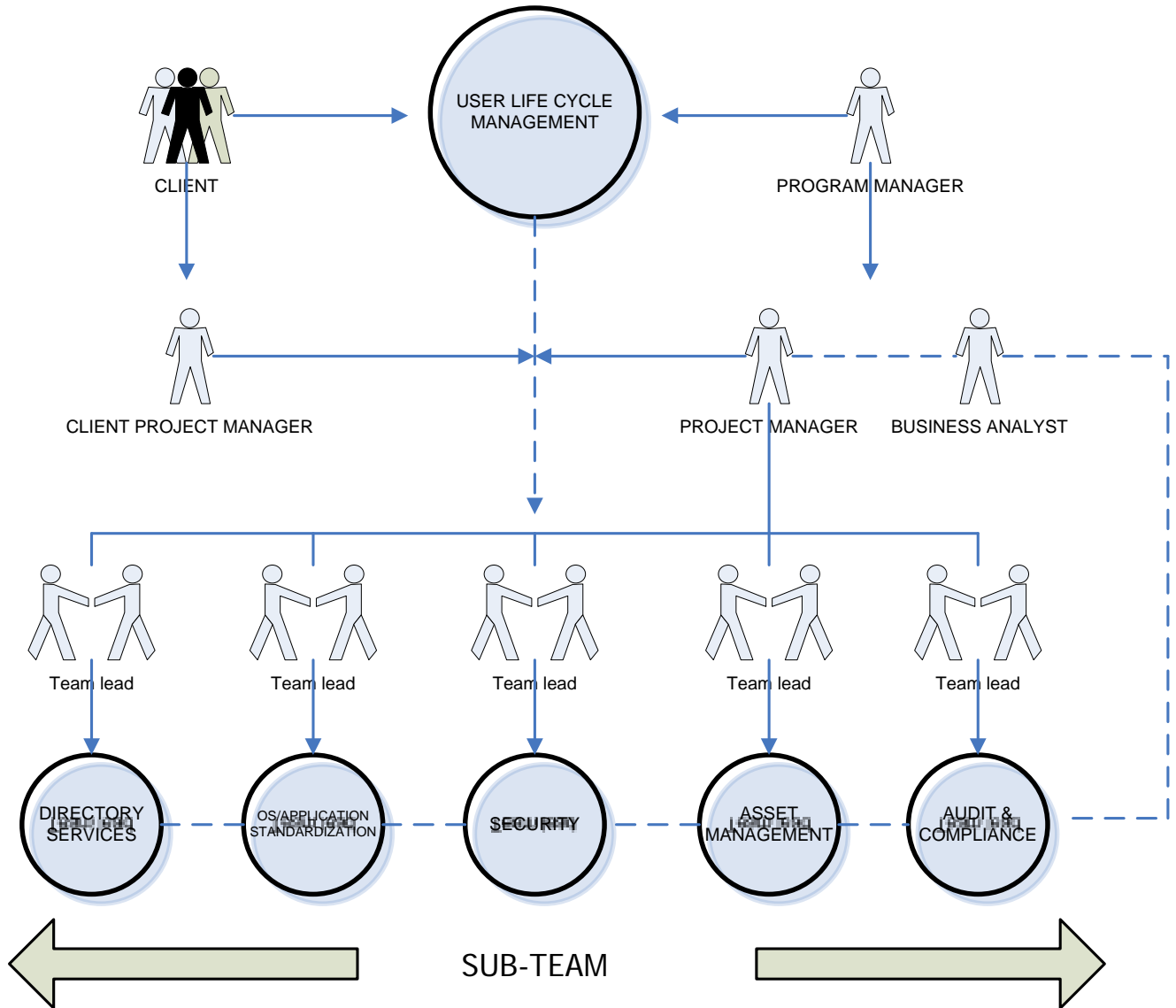
### **Sub-Teams**

Teams dedicated to specific Frameworks are "Sub-Teams" (project managers and business analysts oversee THE Team Leads of these teams and exercise Project Governance) that exist and are formed when tasks within a Framework are large enough to require dedicated resources. A key aspect of a team is not simply that the role requires more than one person to fulfill, but that there is a delineation of tasks among its members. An example is shown in Figure 2. The Team Lead (the Project Manager in some cases) is the point of integration to the rest of the larger project team and the client. Team leads have

some project management responsibilities at the level of their Sub-Team but most over all project management detail and delivery falls to a dedicated project manager for the life of the engagement.

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**Figure 2 - Sample Project Team for User Lifecycle Management**



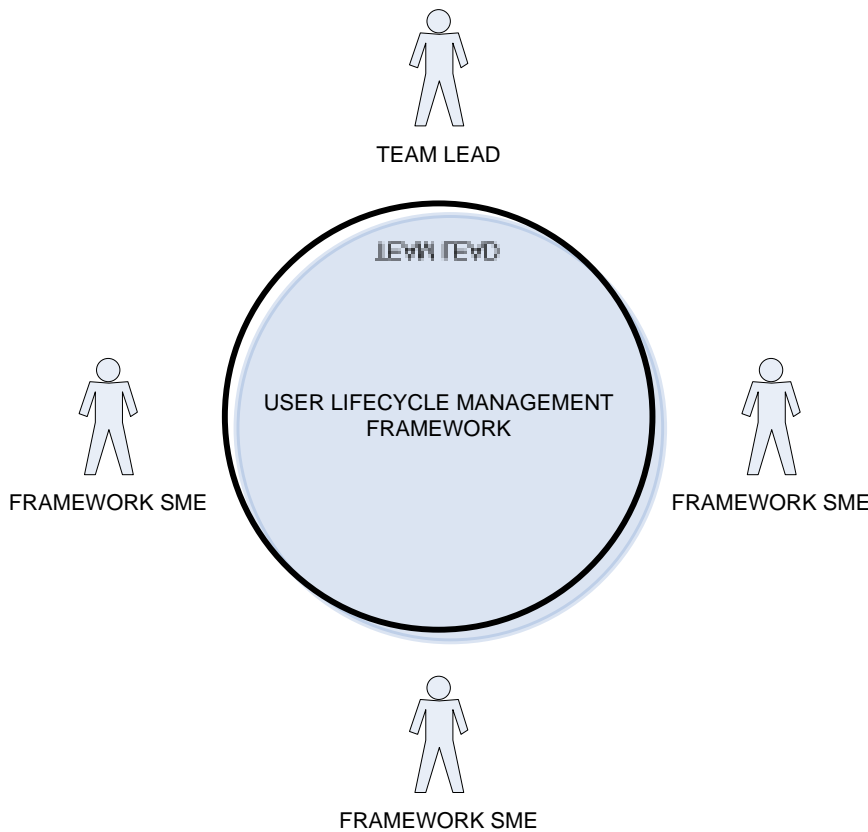


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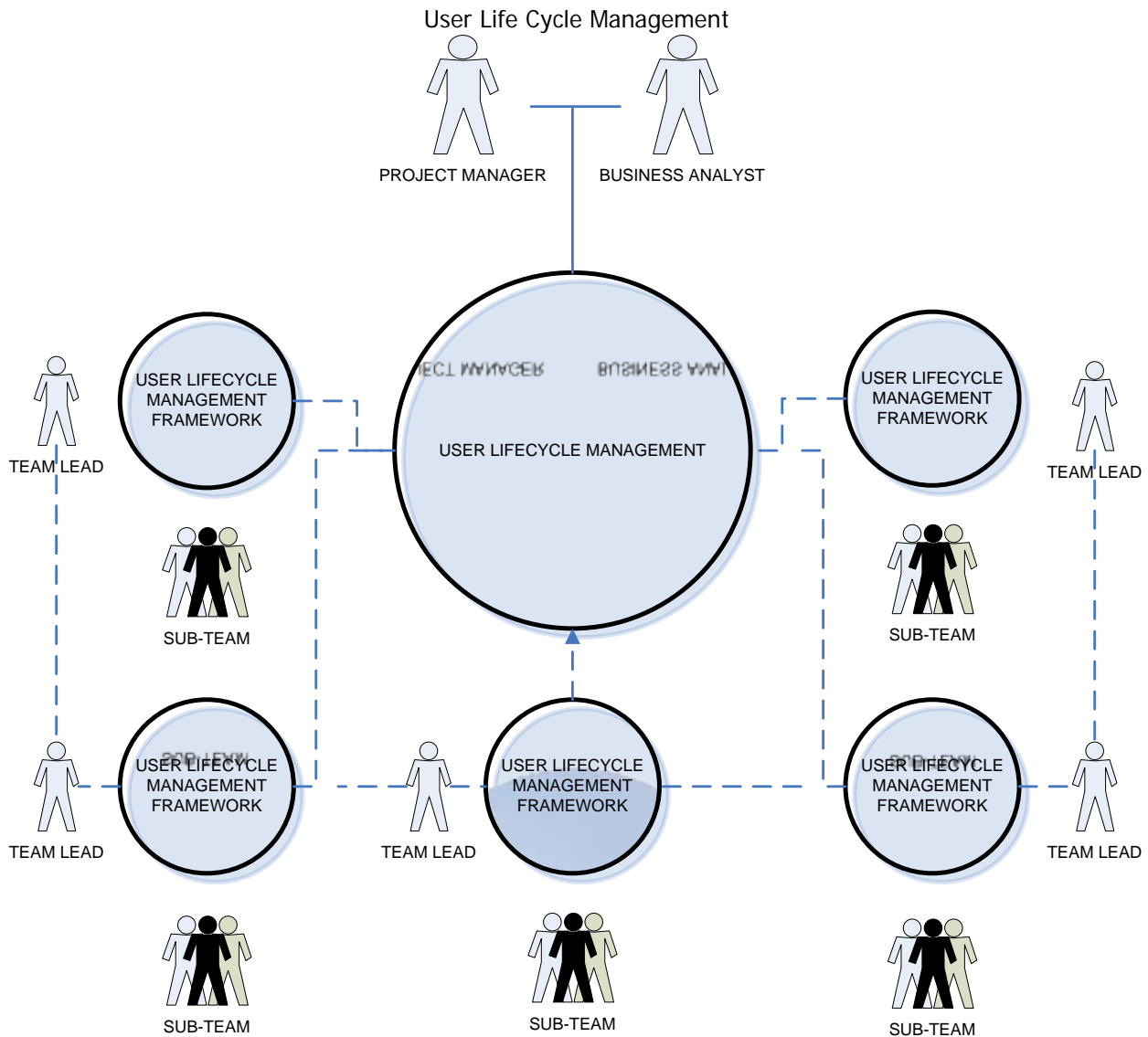
**Sub-Teams Responsibilities**

Sub-Team are multidisciplinary teams that are organized around a particular User Lifecycle Management Framework (Directory Services, OS/ Application Standardization, etc.). **Figure 3 illustrates a typical Sub-Team.** The project management role for that particular framework falls to the Team Lead, who provides the integration point with the larger project team (Project Manager and Business Analyst). The Project Manager also works with the dedicated BA to cycle in new Sub-Teams as the project moves into new phases. **Figure 4 illustrates a Scalable Sub- Team.**

**Figure 3 - Sample Sub-Team for User Experience**



**Figure 4 - Sample Scalable Sub-Team for User Lifecycle Management**



In Figure 4, as a project scales all roles are filled by members of the project Sub- Team. Each project Sub- Team has a dedicated Team Lead that is responsible for his or her project Sub- Team time management, deliverables and communication to both the Project Manager and other Framework project Sub- Team Leads. The Program Management role owns the client relationship and oversees the Project Managers activities throughout the lifecycle of the project.

**Project Management Responsibilities**

This section describes how Project Management activities are distributed among team members at various levels of scale and complexity. Figure 5 describes the Project Management responsibilities that

User Life Cycle Management are owned by Team Leads. Project Managers working in a complex project (shown in Figure 4) are focused on the same areas in a smaller project, the differentiator is the addition of personnel as defined by the project scope/ deliverables.

**Figure 5 – Project Management Responsibilities**

**Project Management Responsibility**

	Planning/ Tracking	Scope Management	Change Management	Schedule Management	Cost Management	Staff Resource Management	Communication Management	Risk management	Quality Management
Team Lead Responsibility	O	O	O	O	O	O	O	O	O
Project Management	Θ	Θ	Θ	O	Θ	O	Θ	Θ	Θ
User Lifecycle Management at Sub-Team Level	Θ	Θ	Θ	O	Θ	O	Θ	Θ	Θ
Project Development	Θ	Θ	Θ	O	Θ	O	Θ	Θ	Θ
User Lifecycle Management Deployment	Θ	Θ	Θ	O	Θ	O	Θ	Θ	Θ

Θ	= Team Level
O	= Overall project Level

**Team Leads**

Team leads understand and our subject matter experts (SME) in their particular User Lifecycle Management Framework. Team leads prepare and organize their functional plans for their project teams and role them up into the overall project plan through the Project Manager. Their plans include detailed instructions describing how the User Lifecycle Management Framework work is to be performed, track actual work against the plans, manage scope and change, assign resources to specific tasks in the project Sub- Team and coordinates internal project team communications with other Team Leads. Team leads perform these duties with participation and input from individual members of the project Sub- Teams, Project Managers and in some cases Program Managers. While participating in overall risk identification, Team Leads are specifically accountable for identifying risks in their particular area of expertise. There are three places in Figure 5 where team lead’s responsibilities differ from the pattern of the others:

1. Cost management for a project is generally centralized as a program management responsibility. To distribute this function among team leads would be distracting and likely invite chaos
  
2. Procurement responsibilities are handled by Program Management administration / or the client, not Team Leads. Program Management handles all contracting of services for the project and miscellaneous purchases.

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3. Communication management at the overall project level is shared by both Program Management and Project Management. Project Management (along with Program Management) creates and delivers the communication plan for the client, stakeholders, and any external audiences. Program Management plans and is responsible for client related project communications, such as status reporting, conducting team meetings, and the like. Program Management communication also includes planning communications, assigning designated points of contact, and progress reporting beyond the team.

### **Program Management**

In addition to being responsible for supporting the User Lifecycle Management Framework and overseeing the delivery of functional / project specifications, program management owns all of the project management areas for the project as a whole. Program management integrates project Sub-Team plans into the master plan, synchronizes schedules, and manages cross-team dependencies through the Project Manager.

### **Project Management in Large, Complex Projects**

As a project gets larger and/or more complex, it can become overwhelming to implement the User Lifecycle Management Framework, update schedules, send out team communications, report progress and perform other project management activities. To cope with this, we often deploy a second Program Manager to divide the responsibilities of the program management role cluster into solution architecture and dedicated project management role.

### **Project Administrative Services**

To manage the details of a project, track financials, procure supplies and services, manage staff turnover, provide orientation and training, set up team workspace facilities and accommodations, we deploy a backend administrative team that is transparent to the client. In order to allow the project manager to focus on the most pressing issues, the more routine project management activities (as mentioned above) are delegated to a project administrative role. Project administrative services also provide support for team leads, assisting with maintaining team schedules and other project management activities.

Sub- Teams are also considered project teams but they are made up of a Team Lead and any other additional resources as dictated by the project scope. A complex project, as noted within the User Lifecycle Management Framework means the project has high risks related to the following factors:

- Larger projects incur greater costs
- Geographical disbursement - teams can be spread out over great distances, creating communication challenges and travel expenses
- Team members belonging to multiple companies, organizations, or subcontractors
- Fixed timelines or highly constrained budgets
- Contractual or legal issues that will require skills and/or time to manage

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To mitigate these risks, the Program Management role leverages a baseline administrative team (outside of the client site) dedicated to base business and client project administrative support.

### Change Management Process

The Change Management Process published in this document pertains to the general methodology that supports the implementation of User Lifecycle Managements 5 Frameworks. The Change Management Process will formalize the alteration or change of existing operational breakdowns (referred to in this document as “Disparate Symptoms”) in daily communications and business operations. This document section is intended as a source of information for the formalization and ongoing implementation of the Change Management Process as it relates to new and existing departmental business process workflow.

All business organization operating departments should participate in universal business operating process and procedures. Exclusion from general operating process and procedure creates gaps in the chain of communication which can lead to any number of critical financial and operational “Disparate Symptoms” that eventual undermine the operating fluency of a multi-departmental organization.

Disparate Transition of processes, changes and additional “User Impact” will cause process breakdown and operating inefficiencies that will ultimately have a negative impact on your organization’s financial operations and human resource moral. Attempting to make organizational or operational corrections will only compound or further create gaps in your organizations operating efficiencies and further accentuate or accelerate an organization’s financial operating inefficiencies.

The introduction of Change Management Processes and procedures will formalize the daily functions for business operating departments and further define the group as a pioneering organization in a position to successfully influence and support company growth.

### Project Communications Management

Project Communications Management involves the identification, determination and organization of project stakeholders needs. This determines who will need what information, when they will need it and what the best way to communicate to the stakeholder is.

Project communication and methodologies can vary greatly and need to have a measure of flexibility as the way a project is communicated to the client and the provision of that communication is an important factor for the success of the project. Project Communications Management first establishes a quick understanding of the project sponsors communication needs and then acclimates tem plated project documentation to meet the stakeholder’s requirements. This save s time and lessons the possibility of “data translation” during the project lifecycle. Some of the tools taken into consideration are as follows:

- Project organization and project stakeholder communication needs (Executive level, Management Level, User Level, etc.)
- Logistics of individual and departmental project involvement
- Level of information description
- End user communication
- Project brand management

### Project Cost Management

Project Cost Management is defined as any and all financial elements within the approved budget required completing a project. Project Cost Management takes the following key elements into consideration:

- Resource Planning: The determination of project resources, equipment, people/ skill levels and disciplines, materials, licenses, etc.

#### User Life Cycle Management

- Cost Estimating: An approximation of resources and time needed to complete the project
- Cost Budgeting: The allocation of the overall estimated project costs to all work related activities and proper financial budget categories (operating vs. capital expenditures)
- Cost Control: Controlling and tracking scope change and documenting the financial impact on the project.

Each one of these processes interact with each other and are variable dependencies to the projects overall success. Unlike most project management methodologies, this methodology incorporates cost management into the primary project plan. This includes project return on investment (ROI) calculations prior to the delivery of the User Lifecycle Management's 5 Frameworks which calls out client responsibilities for future organizational maintenance of the frameworks deliverables. This provides the framework for clients to make disciplined and accurate financial decisions prior to project execution with its own project phase map and ROI calculators.

#### **Project Documentation**

At the conclusion of the project summary documentation with a structured guideline containing a comprehensive list of standards and instructions needed to maintain the component make-up of the 5 Frameworks is delivered to the client organization. This document contains information that is "actionable" so the client may continue to leverage the tools and management / deployment systems needed to realize a decrease in ongoing operational support cost. These deliverables will include process documentation and recommended schedules for staff training and ongoing maintenance.

#### **Post Deployment & Project Turnover**

Delivered documentation and project turn over should include the following components:

- Comprehensive project documentation, team knowledge transfer, and complete process/ project turnover
- Actionable project work papers enabling the client to leverage the tools and process needed to realize a decrease in ongoing operational expense and future scalability

#### **Appendix**

##### **Go From Tactical to Strategic: Build a Service-Oriented Architecture**

"By 2008, more than 60 percent of enterprises will use SOA as a "guiding principle" when creating mission-critical applications and processes."

- Gartner -

User Life Cycle Management

**Additional Research**

1. "Packaged Applications Meet Service-Oriented Architectures"  
Gartner ID Number: T-19-6157