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DCG Measurement Roadmap Process Description and Process Flow

Initial Data Gathering: (Two Sessions)

1. Management Goals Workshop (Executive Management)

The consultant will facilitate a group goal, question and metric session to identify a superset of organizational metrics.

Participants: Senior and Middle Management IT Decision Makers (sample if very large organization) and Consultant

Techniques: GQM, Affinity Diagramming, Brainstorming

DCG Roadmap Step: A

Output: Draft Goals, Questions and Metrics

Session Duration: 90 – 180 minutes |

Synthesis of Data: One day of effort

2. Current Measurement Identification

The consultant will facilitate a group session to identify the current measures and metrics used by the organization. The focus will be on the primary measures and metrics (project, operational and financial). Only primary measures will be collected to constrain the number measures and metrics identified.

Participants: IT Financial Analysts, PMO Leads, Data Center/Operations Analysts

Techniques: Group Discussion

DCG Roadmap Step: B

Output: Current Measurement List

Session Duration: 180 minutes (Note for large organizations this many need to be split into three sessions)

Synthesis of Data: One day of effort

Data Consolidation and Metrics Definition

3. Linkage Mapping

The consultant with support from the organization (metrics working team) will consolidate the data gathering the working sessions. The initial step will be to generate synthesized meeting minutes. The metrics working group will then reduce the data into a matrix that show the relationship between the organizations goals and metrics currently collected. The Metrics Matrix will be sent to the participants to facilitate ongoing involvement and input.

Participants: Metrics Working Group

Techniques: Working Session

DCG Roadmap Step: C

Output: Metrics Matrix

Duration: Two - Three Days

4. Measures and Metrics Identification

The metrics working group will review the GPM session results, current metrics and the resultant Metrics Matrix to identify those metrics that support the organizational goals and gaps.

Participants: Metrics Working Group

Techniques: Working Session

DCG Roadmap Step: D

Output: Focused Metrics List

Duration: ½ - One Day

5. Metrics Validation Session

The consultant will facilitate two sessions (senior management group and metrics SME group leveraged in current metric session) to validate and refine the identified metrics and gap solutions.

Participants: Metrics Working Group

Techniques: Presentation

DCG Roadmap Step: E

Output: Accepted Measurement List

Session Duration: 60 minutes (two sessions, 60 minutes each)

Rework: ½ - One Day

6. Metrics Definition Development

The metrics working group will develop metrics definitions (definition, sources, data requirements, analysis suggestions . . .) for the validated metrics. As part of the definition each metric will be analyzed and flagged for applicability for inclusion in Borland's Team Analytics.

Participants: Metrics Working Group

Techniques: DCG Metrics Definition Template

DCG Roadmap Step: F



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Output: Metrics Definition Template

Duration: Two to Three Days (with client support and data availability)

7. Metrics Data Map

The metrics working group will synthesize the metrics definitions into a metrics data model to facilitate implementation in Team Analytics, manually (temporary) until interfaces can be developed or manually (permanent) if interfaces are not an option. The map will be compared to the data currently collected in the organization (systematically or manually) to identify data and automation needs.

Participants: Metrics Working Group (mapping will be client lead activity)

Techniques: Data Modeling (client identified or Entity Relationship default)

DCG Roadmap Step: G

Output: Metrics Data Model

Duration: Three to Five Days (with client support and data availability)

Dashboard Prototyping

8. Metrics Dashboard(s) Definition

The consultant will develop a prototype metrics dashboard (IT Overall and one layer down) based on the validated goals and metrics (see Step Five). This prototype will be used to refine the dashboard to be implemented in Team Analytics (or possibly in conjunction with Team Analytics). It is anticipated that a single review session and some rework will be required.

Participants: Metrics Working Group (mapping will be client lead activity), Review Session – Management Team identified in Step One

DCG Roadmap Step: H

Techniques: MS PowerPoint Prototyping

Output: Dashboard Prototype

Review Session Duration: 60 Minutes

Duration: Three to Five Days with rework (with client support and data availability)



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Scheduling

The sessions described above are typically scheduled as a mix of onsite and offsite sessions. Of course, the whole roadmap may be delivered onsite. The sessions are scheduled over 4 separate weeks. These weeks may be contiguous but this is not always possible due to the availability of client staff. With extra resources, week 3 and week 4 can be executed in parallel giving a minimum duration for the roadmap implementation of 3 weeks. Again, this may or may not be desirable to the client. The four week schedule is:

Week 1: Sessions 1, 2 and 3 (typically 3 working days). These must be onsite.

Week 2: Sessions 4, 5 and 6. These are often performed offsite with several online meetings during the week.

Week 3: Session 7. Onsite is preferred but offsite may be possible in some circumstances.

Week 4: Session 8. Usually conducted offsite with an onsite or online review session.

