Digital Transformation Advisory Analysis & Recommendations

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Context

Context

Girl Scouts is at a critical inflection point and needs to ensure that the technology roadmap can deliver a relevant customer experience going forward

IBM's understanding

- GSUSA is on a journey the past few years to gradually develop better processes and digital capabilities
- The organization is focused on a digital transformation to improve the customer experience for members, volunteers, caregivers and employees
- There is an ambitious three-year technology roadmap to enable a new customer experience
- There are critical technology milestones coming up in the next few months

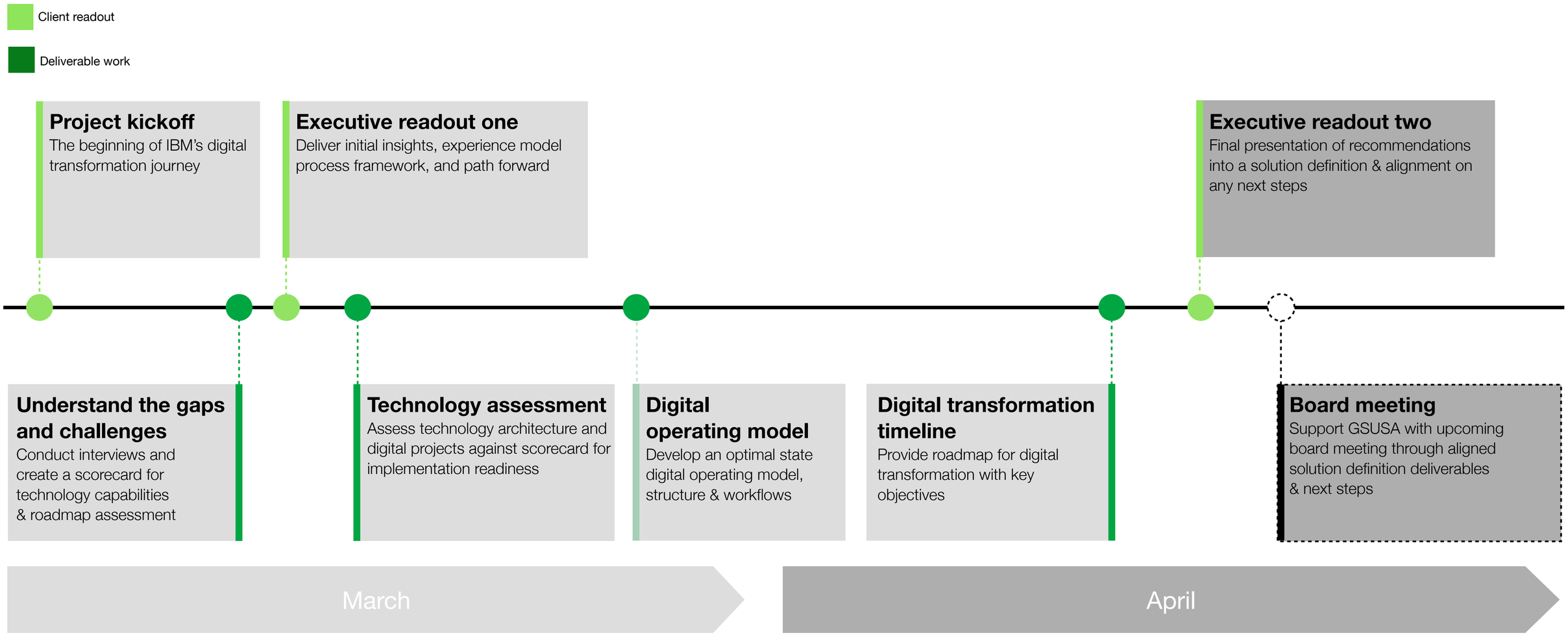
Key challenges

- Focusing amidst a high number of priority initiatives
- Aligning technology to a strategic plan during a bridge year that exists between the prior three-year strategic plan and the coming one
- Executing all initiatives with limited resources, capacity and technology expertise strains the organization
- Obtaining buy-in from the councils is often difficult

Project scope

- The IBM team analyzed how organizational factors influenced the delivery of the technology roadmap and developed six observations
- The IBM team conducted a technology assessment and identified a set of risks that could impact GSUSA's ability to fulfill the future vision
- The IBM team delivered a digital operating model, anchored around a best-in-class Experience Development Process
- The IBM team developed a digital transformation timeline to help GSUSA achieve its future vision

IBM’s timeline to help GSUSA launch future, customer-centered programs with speed and scale



Future vision

From	To
Requirements and solutions are business activities with upfront fixed schedules	Ever shorter cycles of continuous requirements validation, development and release are strategic initiative outcome focused and end-user driven
Business teams hand over requirements to development teams	Business teams become product owners working continuously with development teams
Siloed and fragmented systems are managed by separate communities and run by third party suppliers	Many-to-many integrations between systems forms a holistic multi-purpose ecosystem
Teams build and develop applications and features using a monolithic architecture style	Teams build micro-services in an API-led architecture
Management of third party suppliers for application development is decentralized	Move to a supplier based model, under a common governance framework
Capacity planning occurs at the project level, while budgeting is centralized on an annual basis	Conduct enterprise-wide capacity planning and management of IT spend at the portfolio level, focused on creating highest value for the customer
Application teams develop applications and then hand over their work to operations teams to run and maintain	Application teams become service product lifecycle teams, providing operational support

IBM conducted working sessions, deep dives and one-on-ones in addition to reviewing 300+ documents to understand the current state of digital initiatives

Executive team interviews

- Sylvia Acevedo
- Sarah Angel-Johnson
- Andrea Bastiani
- Amy Berkowitz
- Tony Doye
- Annette Freytag
- Lynn Godfrey
- Barry Horowitz
- Lynelle McKay
- Maureen McNerney

Group discussions

- Chief Operating Office, EI
- Enterprise integration PM office
- IT customer engagement
- Customer office
- Marcomm, Fund development, Girl & family, GSM
- IT foundation
- IT / PMO e-commerce

Follow-up discussions & topic deep dives

- VS 2.0 deep dive
- VOLP deep dive
- Mobile deep dive
- API management
- Digital Cookie deep dive
- VTK / web sites / GoGold deep dive
- eCommerce deep dive
- Follow-up 1:1 discussions

Documents reviewed


Competitive analyses


Customer insights


External research


Organizational charts


Planning documents


Process proposals


Technology infrastructure

Learnings

Today's "bottom-up" architecture works against the need for speed and scale

The current environment struggles to serve an omni-channel, customer-led ecosystem

Findings

1. The current “siloed” (1.0) architecture cannot support the **omni-channel, customer-led needs** of the digital roadmap; the future state (2.0) vision is built on sound industry standards, but best practices are needed to fill the gap and will take time

2. **Different platforms leverage different frameworks**, resulting in a lack of consistent experience for volunteers, members and girls; however, the right measures are in place towards a resolution

“We should have a more quality focused approach, because we only get one chance to get it right. Otherwise, we may ruin our perception with our customers.”

When planning for parallel work with many dependencies, complexity increases

As projects scale and teams grow, risks increase

Findings

1. In an organization with many constraints and prioritization challenges (“everything is a priority”), **projects compete for resources**

2. It is common that expectations by the business were set before IT **properly sized them for cost, resources and timing** which can lead to unwanted compromises down the road

3. Parallel builds with many-to-many dependencies are **hard to manage, time-consuming and resource-intensive**

“The work should drive the date of go-live, not just an ideal date and then you have to fit the work to make it happen.”

Current operational framework requires updating to address tomorrow's needs

A common governance framework becomes imperative as complexity grows

Findings

1. Current operating processes and standards are spread out between a multitude of vendors and programs making the **need to evolve the current governance frameworks** more critical to success than ever

2. Parallel to solution development, a **clear and disciplined ITSM plan addressing the increased future complexity** (cross-program reliability, monitoring, incident response, customer support, etc.) is paramount

3. A holistic approach to ever shorter cycles of continuous requirements validation, development and release between teams and partners already exists but **should become more disciplined and repeatable** in order to scale in the future

"We need a stronger muscle from an operational perspective."

Culture of caution

The culture of caution curbs communication and prevents progress

Findings

1. The **fear of "failure"** and **lack of empowerment** results in a "lean out" approach to problem solving, decreasing the opportunity for growth and learning

2. The **inconsistent start to projects** prevents cross-functional collaboration from the beginning, resulting in missed opportunities and "fires" later on in the project lifecycle

3. The **misinterpretation of terms** creates confusion and creates a barrier in communication (the "Girlscoutification" of terms)

"People are saying it's fine, but it's not fine at all."

Relationships replace scalable processes

The inconsistencies and limited adoption of formal processes produce a reliance on relationships to get things done

Findings

1. The **lack of insight into capacity management** results in top performers being pulled from their “normal job” onto priority projects, confusing individual priorities and accountabilities

2. While the **“homemade” approach** to process can promote productivity within a Community, it remains siloed, limiting the productivity potential of the organization

3. So many ideas exist, but don’t get killed or move forward, creating a continuous **idea loop**

4. Processes are often **side-stepped or ignored**

5. The absence of structure, purpose and documentation of meetings create a seemingly **endless meeting cycle**

“If there’s never a line in the sand, then you can’t be held accountable and you won’t fail.”

Strategy and priority are on the periphery

Employees seek clear guardrails to operate in, but the plethora of priorities disrupts focus

Findings

1. When **everything is treated as a priority**, nothing is a priority

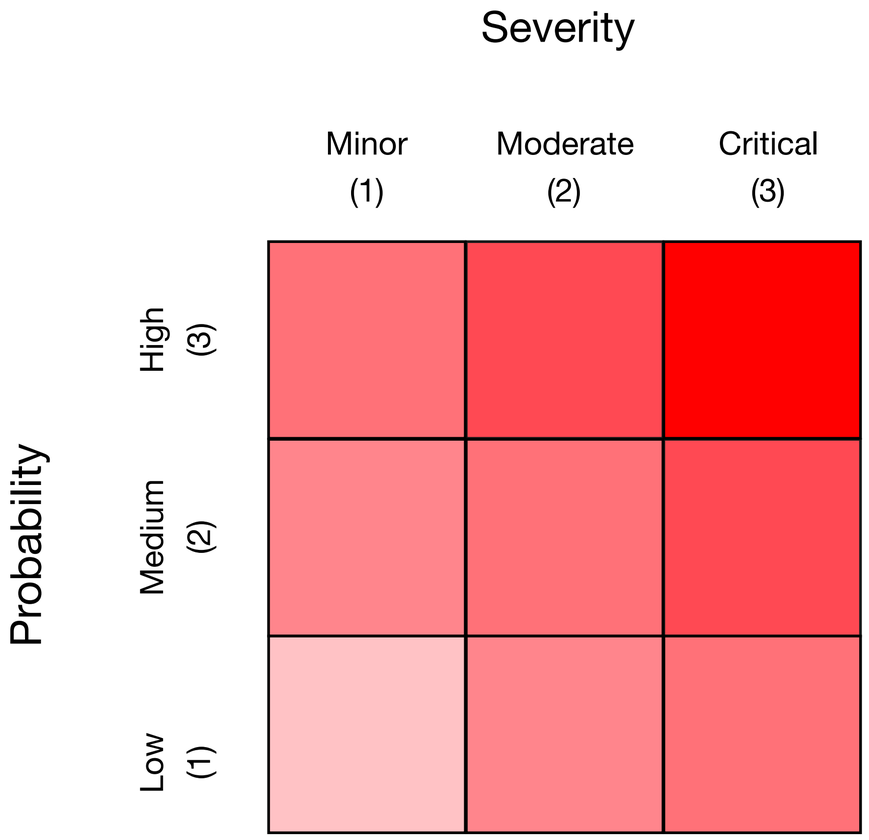
2. The **top heavy** organizational structure results in middle-to-entry-level employees overproducing with little ownership or autonomy

3. Employees desire **transparency from the top** so they can align projects to organizational goals and understand how they will be impacted when new decisions are made

“Everyone is crashing into each other.”

Risks

IBM applied its best-in-class risk assessment methodology



Severity

Critical (3)	Serious threat to ability to deliver and run digital products and projects
Moderate (2)	Poses a potential threat to success of digital products and projects
Minor (1)	Small potential for negative consequences, but will not significantly affect overall ability to deliver digital products

Probability

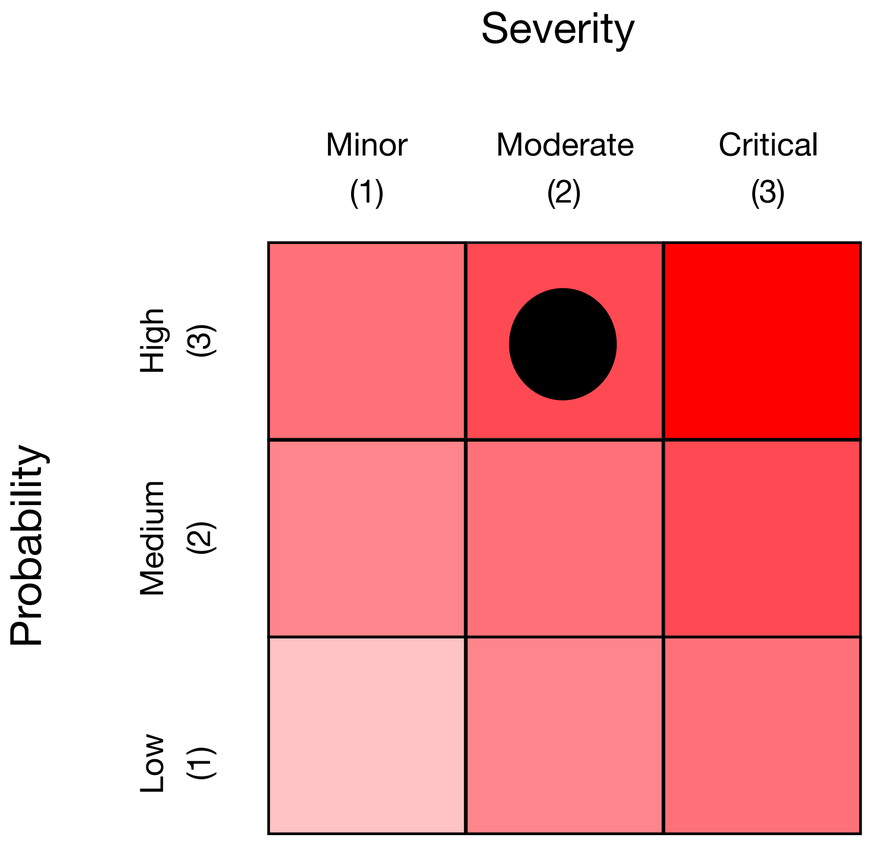
High (3)	Probable chance of occurring
Medium (2)	More typical risk - about 50 / 50 chance
High (1)	Small chance of occurring

The IBM team identified six risks

1. Low adoption of enterprise wide project processes and governance increases potential for misalignment
2. Project commitments occur before “Planning” actions are completed
3. Inconsistent process for defining and managing project service level standards across the enterprise
4. Delayed building of foundational architecture elements
5. Inconsistent cross-vendor product development lifecycle
6. Low preparation for future IT operations and help desk needs

Risk case #1

Low adoption of enterprise wide project processes and governance increases potential for misalignment



Assessment score

Severity: 2

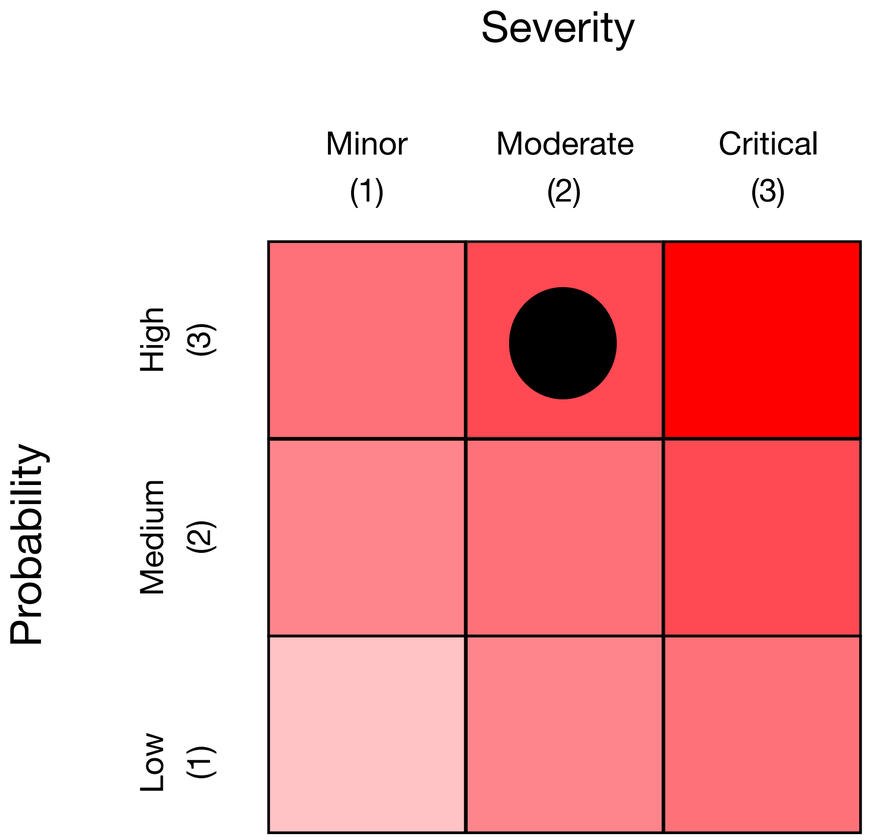
Probability: 3

Risk

Inefficiencies will arise as a result of the current requirement management process, lack of clear ownership, role overlap, lack of clear prioritization and long lead times to project start dates. The potential for future misalignment between product portfolio and enterprise strategic priorities as a result of current portfolio management process is possible

Risk case #2

Project commitments occur before “Planning” actions are completed



Assessment score

Severity: 2

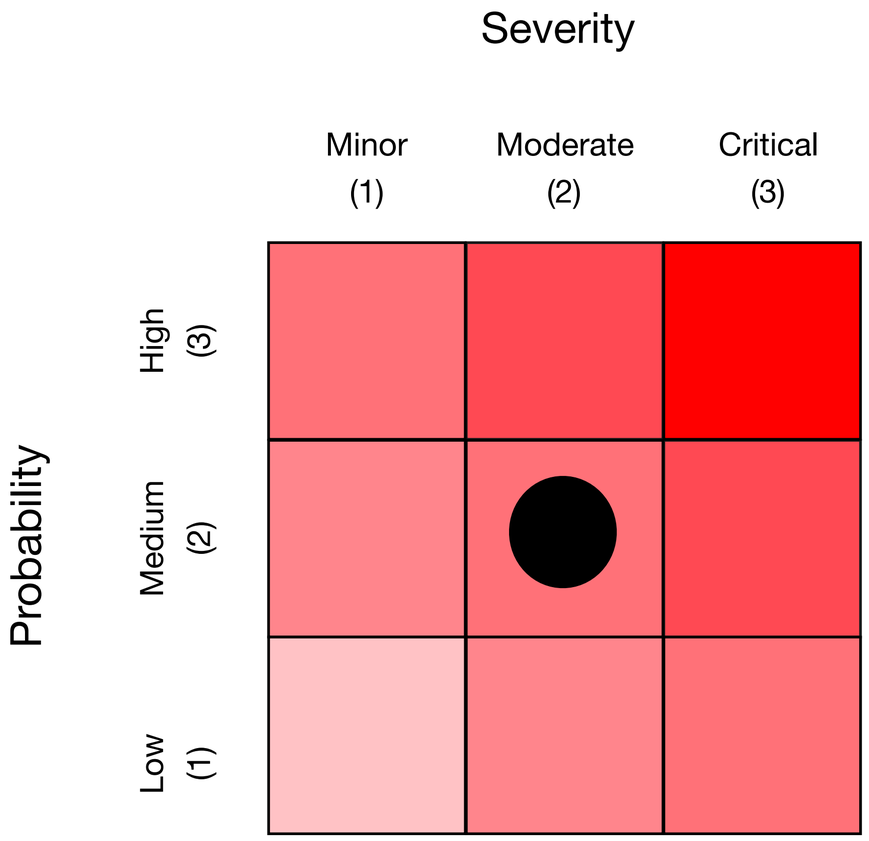
Probability: 3

Risk

A dependence on dates over readiness of work, alignment to enterprise strategy and vendor needs compromises project milestones, deliverables and costs

Risk case #3

Inconsistent process for defining and managing project service level standards across the enterprise



Assessment score

Severity: 2

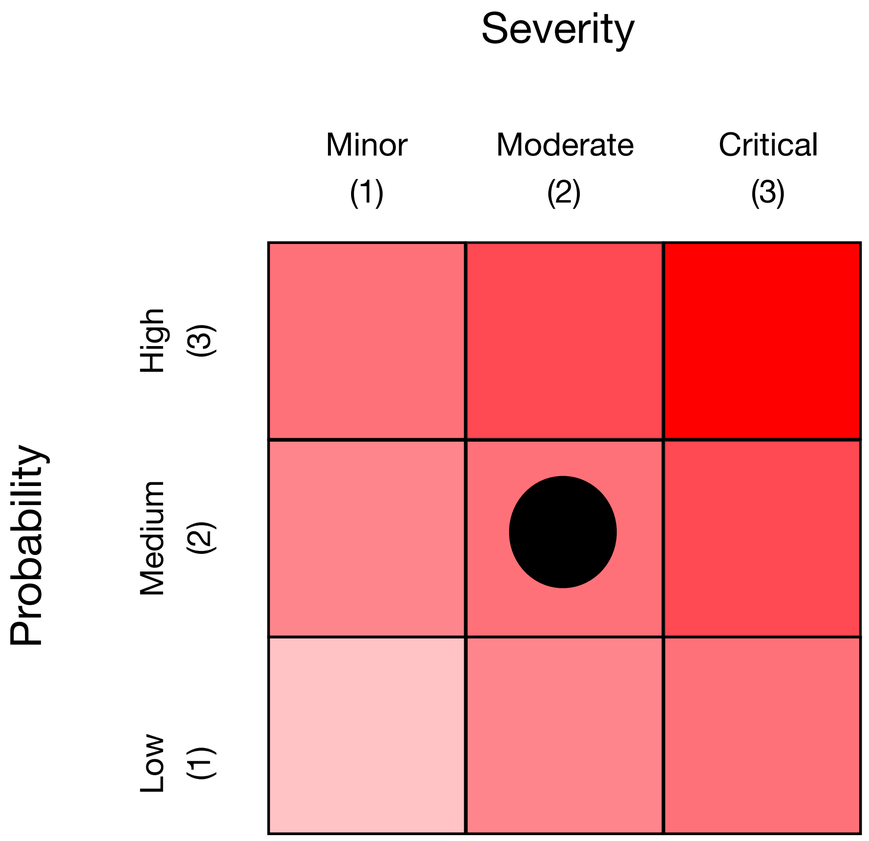
Probability: 2

Risk

There may be product quality issues, delays, and rework in the future as a result of the lack of a standard, consistent organizational practice in managing non-functional requirements such as support levels, security features, and acceptable performance levels of the product

Risk case #4

Delayed building of foundational architecture elements



Assessment score

Severity: 2

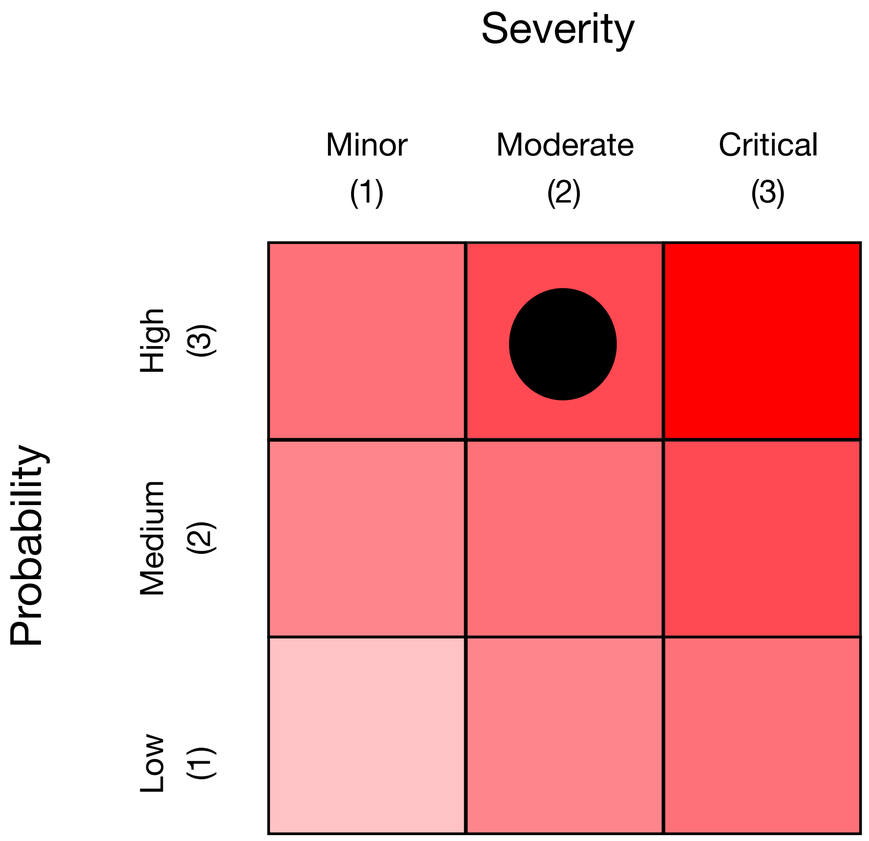
Probability: 2

Risk

The delay in the implementation of some foundational architectural elements that integrate with digital products may require stopgap solutions and subsequent rework to achieve the end state integrations between systems. In addition, continuous deferral of “foundational” projects such as a cross-program data governance program creates opportunity costs and hinders innovation

Risk case #5

Inconsistent cross-vendor product development lifecycle



Assessment score

Severity: 2

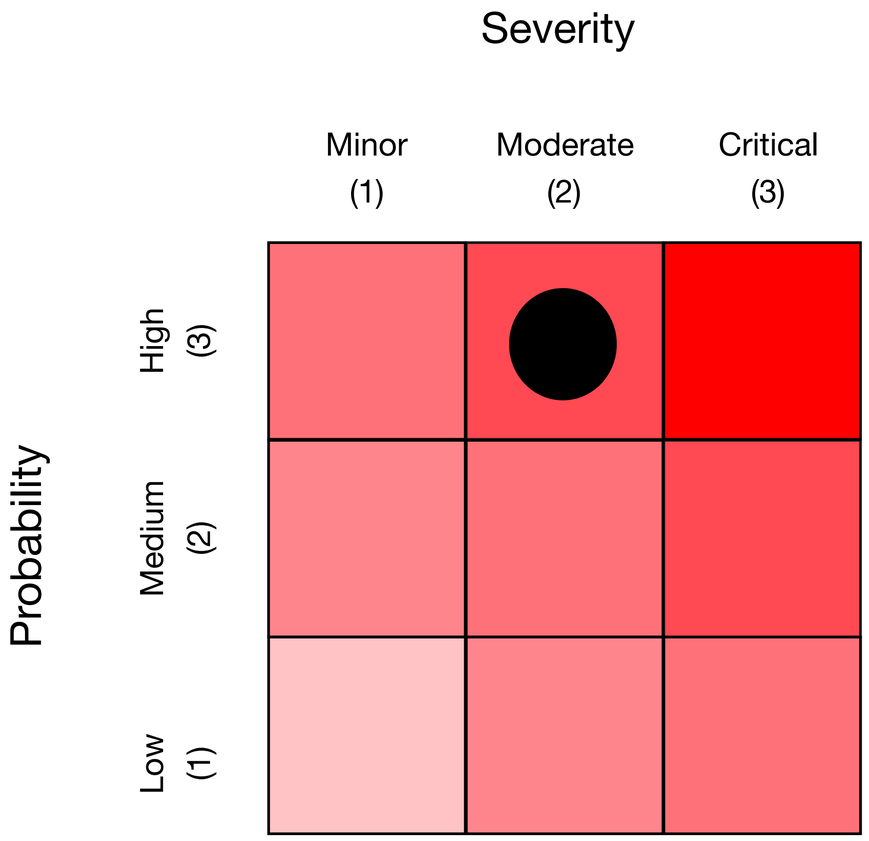
Probability: 3

Risk

Inconsistent cross-team product development lifecycle processes and inconsistent use of development and reporting toolchain may lead to missed requirements, poor visibility into product progress and issues, and the inability to leverage economies of scale in the future

Risk case #6

Low preparation for future IT operations and help desk needs



Assessment score

Severity: 2

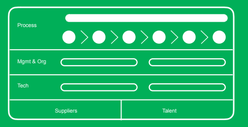
Probability: 3

Risk

There may be a negative impact to the user experience in the future as the increased complexity of the services, greater number of users, and higher user expectations will lead to delays in identifying and resolving problems with digital products

Operating Model

The Experience Development Process is a part of the digital operating model framework and is a best-in-class approach to project delivery



Process

Plan

Explore > Envision > Enable > Engineer > Execute > Evolve

Management & organization

Governance

Agile

Technology

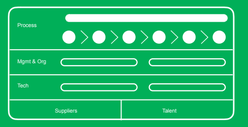
Service management & operations

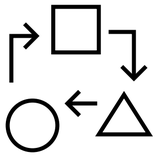
Enterprise architecture

Suppliers

Talent

To be successful, the digital operating model must support a variety of requirements for the process component



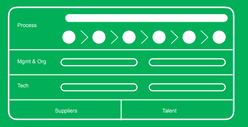


Process

Experience Development Process

- **Plan:** Ideate, prioritize and validate initial ideas before they become projects in order to ensure alignment to the strategic initiatives of the organization and fulfill customer needs
- **Explore:** Bring the project to life through the creation of a project brief and business case establishing key KPIs for project success
- **Envision:** Create the vision of the project through Design Thinking and persona and experience map validation
- **Enable:** Begin the build of the project through UX / UI design
- **Engineer:** Build the project through front-and-back end development
- **Execute:** Launch the project (after a successful QA process)
- **Evolve:** Iterate the project incorporating customer feedback

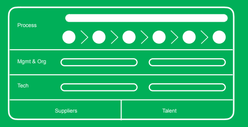
The Experience Development Process is a lifecycle for digital product development



It is intended to:

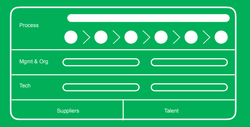
- Align project stakeholders
- Establish buy-in early on in the project
- Validate ideas
- Align ideas/projects to the strategic priorities of the organization
- Help solve a defined customer need
- Establish stage gates
- Set the business requirements and ROI of a project
- Provide a standardized framework for digital project ideas and development across the organization
- Provide insight into the skills required to complete each step (role clarity)
- Allow for scalability of projects
- Contribute to a successful product launch

A formalized, integrated and adopted process will allow for a number of improvements



- Improved productivity
- Early problem detection and resolution
- Faster speed to market
- Improved profitability by achieving target margins and staying on budget
- Better sourcing decisions
- Improved cross-functional team collaboration
- Adoption of PM role and responsibilities

The process must be managed as an integrated process with the voice of the customer at the center

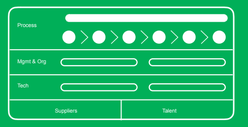


In order for the process to succeed, it must capitalize on key inputs from multiple Communities across the organization - including MarComm, Girl Experience, FD, Merchandising, etc.

Additionally, it should be managed as an ***integrated process*** and with a clear understanding of customers and their changing needs

Incorporating the “voice of the customer” into the process is critical at every stage - from idea generation to development

The Plan phase is a precursor to the process, screening new ideas before they reach project status



Plan

Initial ideation, prioritization and validation

"Gate" committee, business analyst and experience strategist

Screen

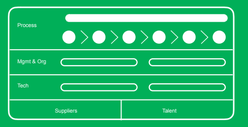
Reminder:
It is much less expensive to screen and eliminate product ideas in the early stages than in the later stages of the project

Activity

Team

Explore	Envision	Enable	Engineer	Execute	Evolve
Develop business case and project brief	Create the project vision	Develop solutions for the project (sprint 0)	Create production (sprint 1 through x)	Run the project	Analyze, maintain, optimize
Cross-functional team 1	Cross-functional team 2	Digital experience team	Digital experience team	Digital experience team	Digital experience team
Create			**Test**	**Launch**	**Iterate**

It provides the necessary stage-gates to ensure an idea aligns with the objectives of GSUSA and meets the needs of the customer



Plan

Initial ideation, prioritization and validation

"Gate" committee, business analyst and experience strategist

Screen

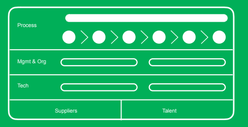
Gate

Reminder:
A stage gate facilities managerial judgment and discipline through series of "gates" before moving on to the next stage

Activity / Team

	Explore	Envision	Enable	Engineer	Execute	Evolve
Activity	Develop business case and project brief	Create the project vision	Develop solutions for the project (sprint 0)	Create production (sprint 1 through x)	Run the project	Analyze, maintain, optimize
Team	Cross-functional team 1	Cross-functional team 2	Digital experience team	Digital experience team	Digital experience team	Digital experience team
	Create			**Test**	**Launch**	**Iterate**

Each step in the process requires a series of unique roles



Plan

“Gate” committee, experience strategist, business analyst

The “Gate” committee is responsible for approving an idea, before it moves to project status

Reminder:
Roles can be combined and some roles do not require a FTE, reference the “Roles and Responsibilities” section for details

Roles

Explore

Cross functional team 1

- Project manager
- Business analyst
- Experience strategist
- Product owner

Envision

Cross functional team 2

- Project manager
- Business analyst
- Experience strategist
- Product owner
- User experience lead
- User interface designer
- Design Thinking facilitator
- Copywriter and content manager

Enable

Digital experience team

- Project manager
- Business analyst
- Experience strategist
- Product owner
- User experience lead
- User interface designer
- Copywriter and content manager
- Architect
- API developer
- Front end developer
- Back end developer
- QA specialist

Engineer

Digital experience team

- Project manager
- Business analyst
- Experience strategist
- Product owner
- User experience lead
- User interface designer
- Copywriter and content manager
- Architect
- API developer
- Front end developer
- Back end developer
- QA specialist

Execute

Digital experience team

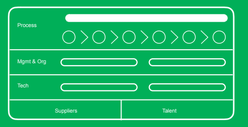
- Project manager
- Business analyst
- Experience strategist
- Product owner
- User experience lead
- User interface designer
- Copywriter and content manager
- Architect
- API developer
- Front end developer
- Back end developer
- QA specialist

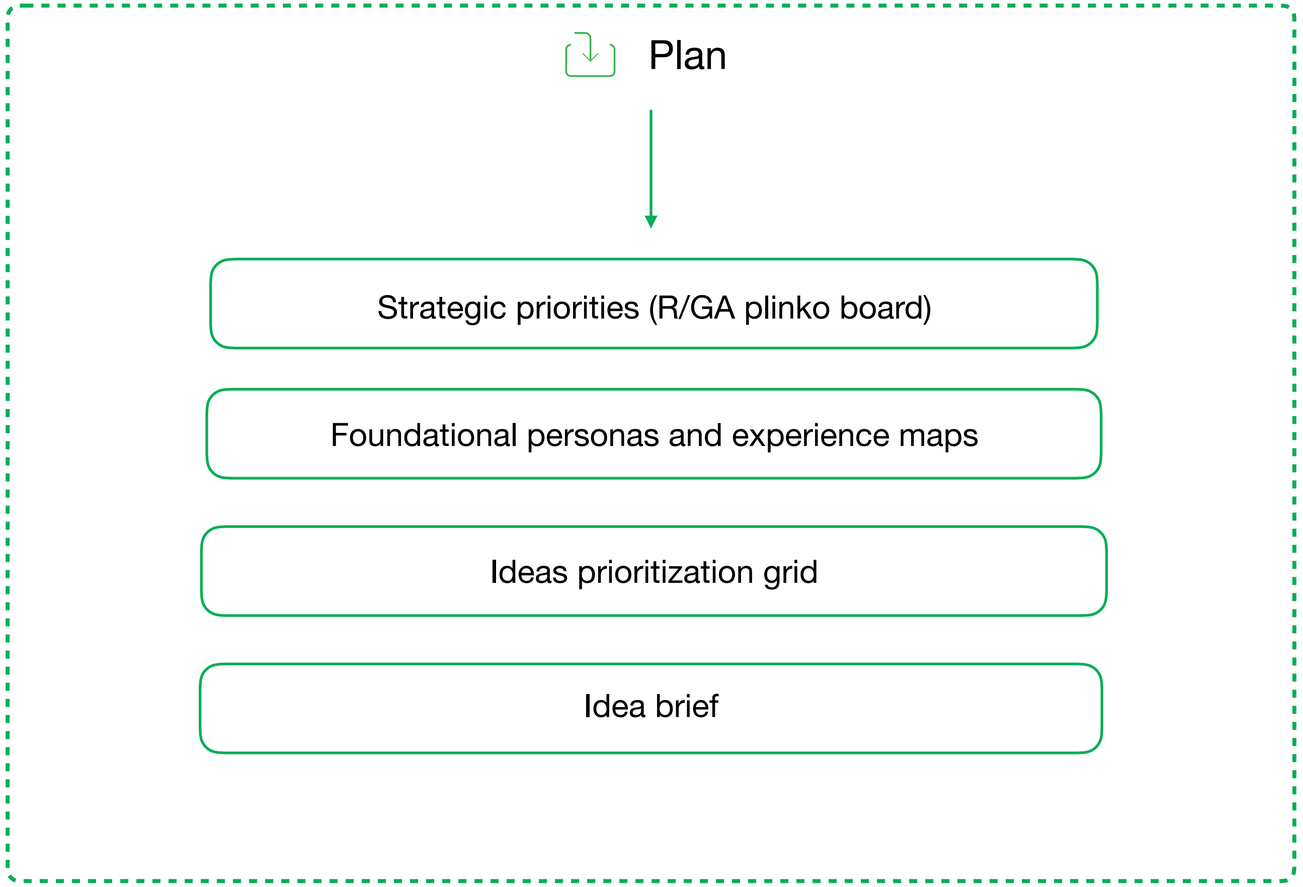
Evolve

Digital experience team

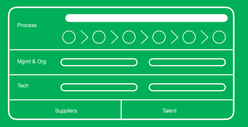
- Project manager
- Business analyst
- Experience strategist
- Product owner
- User experience lead
- User interface designer
- Copywriter and content manager
- Architect
- API developer
- Front end developer
- Back end developer
- QA specialist

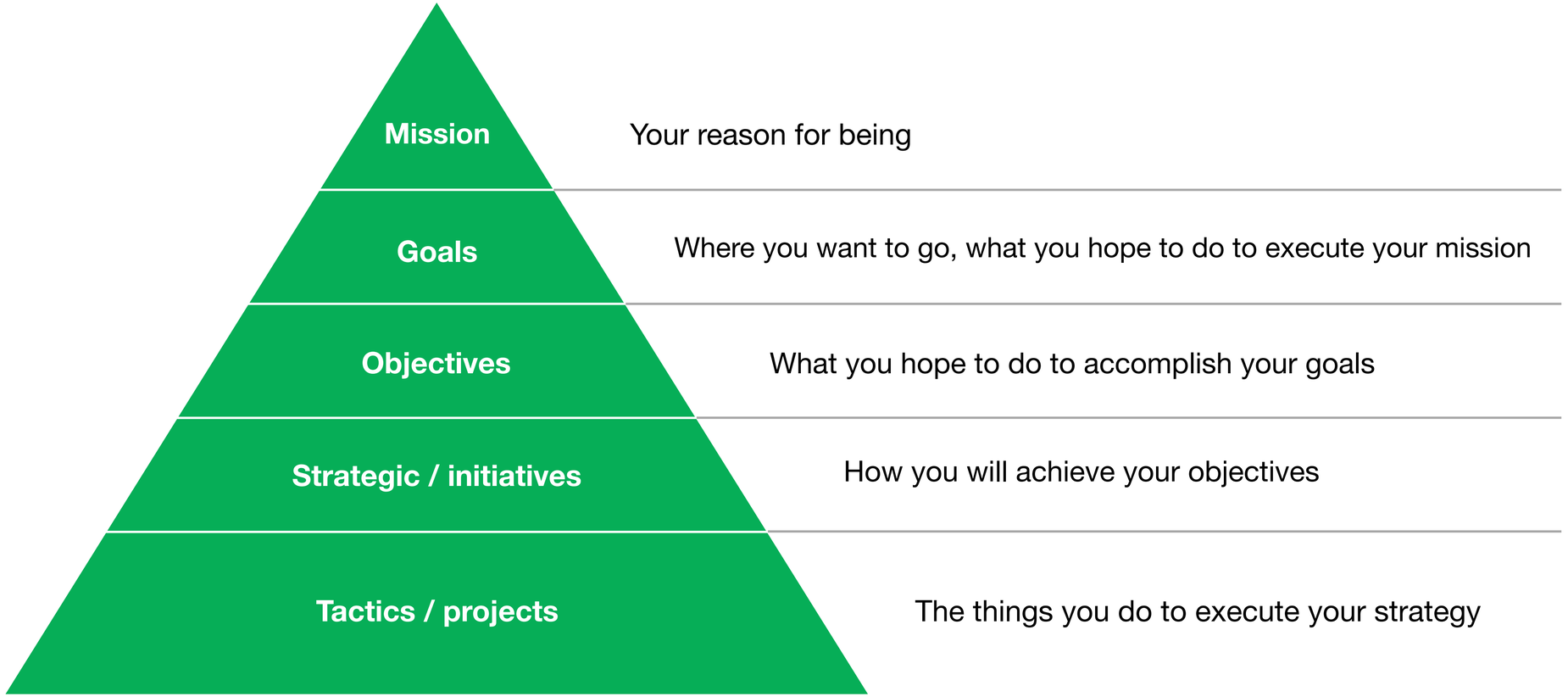
The Plan phase is comprised of foundational elements, which help to stabilize and standardize digital product development at GSUSA





The business objectives and strategic priorities of the organization are set by the Executive Team and should remain static through out the project process





Your reason for being

Where you want to go, what you hope to do to execute your mission

What you hope to do to accomplish your goals

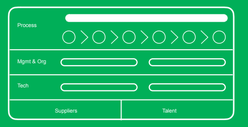
How you will achieve your objectives

The things you do to execute your strategy

R/GA plinko board

Experience Development Process

Foundational personas provide information on the wants, needs and desires of the organization’s customers

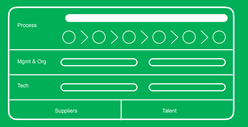


Personas are archetypes of users created from data and observations about real users. Personas help to build empathy and allow us to understand their unique characteristics, needs and goals

Effective personas:

- **Stay in context**, allowing us to map specific points in his/her situation to features in the product he / she can use now
- **Reflect real behavior** patterns, attitudes, skillsets, motivations and goals within the product’s domain
- **Have an end-goal**, What does the user want to achieve? What features would help him/her do that best?
- **Face realistic, relevant scenarios**, written from the persona’s perspective, to envision how users would fins using the product to attain a particular goal
- **Have visible pain points,** identifying the hardest/most frustrating aspect of his / her situation

Personas should be developed and used as reference for all digital products



JOANNE

The Box Color Maintainer
Familiar with Sally Beauty
Market Size: 13.5M

ABOUT

- 51 years old
- 3 children
- Office manager
- Married
- Some college
- Facebook (2-5 times a day)
- Embarassed; Frustrated; Curious

BIOGRAPHY

Joanne lives in Lexington, SC with her husband of 17 years and has three grown children. She works full-time at a local commercial development company as an office manager.

Faith is important to Joanne; she has been attending the same church for the majority of her adult life and enjoys the fellowship and community it provides her.

She often feels stressed and overwhelmed by debt and is always on the hunt to find great deals, especially on her hair color.

Joanne has been coloring her hair using box color for over a decade and feels like she's an expert at it. Coloring her hair is a part of her beauty regime and it provides her with a sense of accomplishment every time she does it. She is loyal to the box color brand she purchases from Walmart, but she is open to new brands. In order for Joanne to purchase from a new brand, she needs a financial incentive and education on the benefits of using a professional, high-quality product. To adopt a new box brand or coloring process, Joanne would require a step-by-step discussion with a store associate in addition to having instructions she can reference when she gets home.

Because Joanne has been coloring her hair for so long, she is growing concerned about the damage it has done to her hair. She feels like her hair lacks the shine of her youth and is upset that it is starting to thin. She cut it shorter than usual a few months ago in an effort to get it healthy again. Despite the damage box color has done to her hair, she does not plan to stop using it any time soon.

Every time she sees her gray hairs growing through her color, she feels anxious and embarrassed. It's important to her to keep coloring her hair for gray coverage, so she can "deny the aging process" as long as possible.

Joanne is familiar with Sally Beauty, but her closest store requires a special trip, as it's not near her weekly shopping route.

Use data to validate demographic information about your user

Bring your persona to life through a compelling story

"I color my hair so I can deny the aging process as long as possible."

Establish her tone through a quote

JOANNE

The Box Color Maintainer
Familiar with Sally Beauty
Market Size: 13.5M

BEHAVIORAL DRIVERS

- Purchases box color for gray coverage
- Doesn't feel like herself when her grays aren't covered
- Appearance is important to her; she seeks to maintain a youthful look
- Stressed by her family's debt; wishes she had more money, so she could get her hair done professionally
- Loyal to the same box color brand (Clairol), unless she finds a great sale
- Purchases her box color at Walmart
- Prefers to use her home desktop computer over her mobile device
- Influenced by ads she sees on network TV; not heavily influenced by celebrities or social media; seeks beauty support from her friends

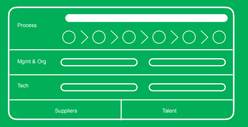
Use "Behavioral Drivers" of the persona to understand her actions

WAY IN

- Appeal to Joanne's concern to keep a youthful appearance
- Reach her through email and direct mail with incentives on Sally color to help get her back in a Sally store
- Highlight the quality and benefits of using Sally box color at an affordable price point
- Meet her need for hair care and maintenance between colors
- Educate her on the differences of box color vs. professional color

Think about how the brand can reach her through the "Way In"

Experience maps are used to understand and address persona needs and pain points



Characteristics of an experience map

- Tied to a specific product or service
- One map per persona/user type (1:1 mapping)
- Reflective of the persona's perspective:
  - Inclusive of mindset, thoughts and emotions
  - Leaving out process details
- Chronological

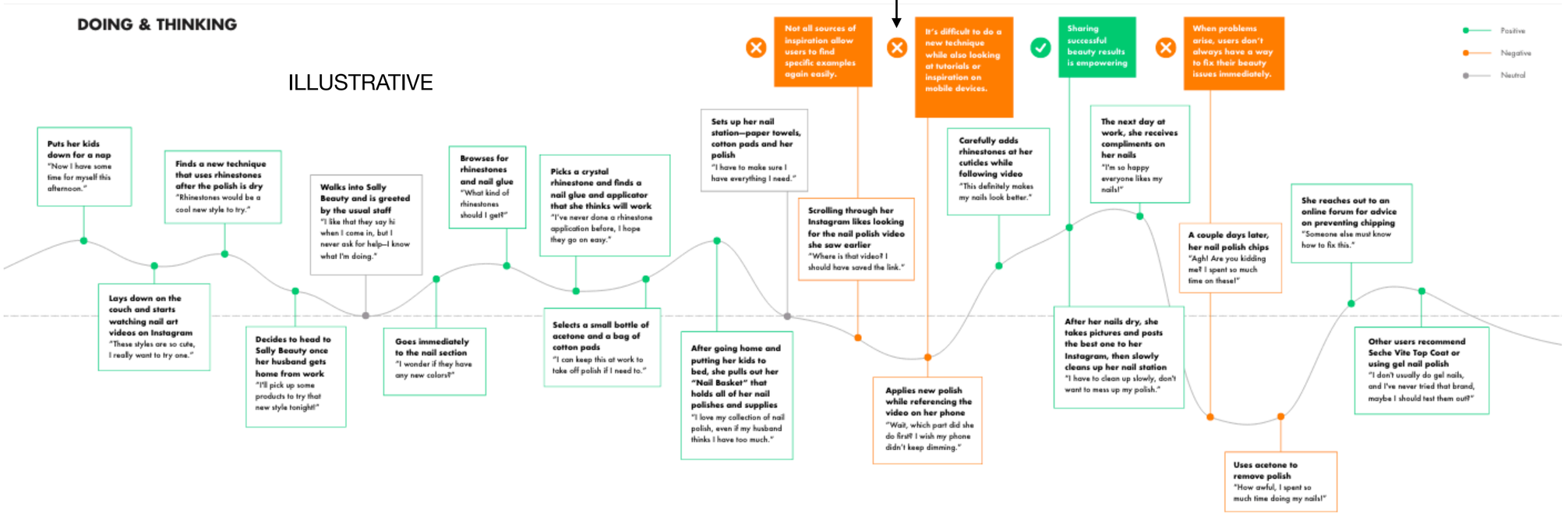
Why to use an experience map

- Pinpoint specific persona touch points that cause pain or delight
- Break down silos to create one shared, organization-wide understanding of the persona
- Assign ownership of key touch points in the experience map to internal departments

Experience maps help to visualize the process a customer (persona) goes through when interacting with a specific digital product or experience

Call out moments of frustration or satisfaction

Plot each step of the experience across an "X" axis, when a box is above the axis it represents a positive or neutral step. When the box is below the axis, it represents a negative step

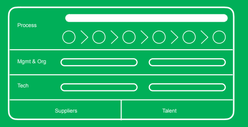


Document how the user is feeling across the experience

FEELING

INSPIRATION	BUYING NAIL POLISH	APPLYING NAIL POLISH	SHARING WITH COMMUNITY
Excited to try a new nail technique.	Excited to try something new.	Slightly annoyed with the tedious process of setting up.	Happy to talk about her application technique.
	Eager to find the right products.	Irritated while searching for the right video.	Proud of herself.
	Anxious to see if the new technique will work.	Increased frustration while looking back at the Instagram video.	Frustrated that her nail art is ruined.
		Mindful to not mess up her nails.	Determined to find a solution to her chipping polish.

An idea brief helps frame and solve the problem in question



Inputs can come from a variety of sources

Input

- Customer feedback (From girls, parents, volunteers, councils, etc.)
- Meetings / ideation sessions
- Primary research inputs (Research conducted by GSUSA)
- Secondary research inputs (Competitor analysis, emerging technology and trends, performance reports, etc.)

Output

Idea brief

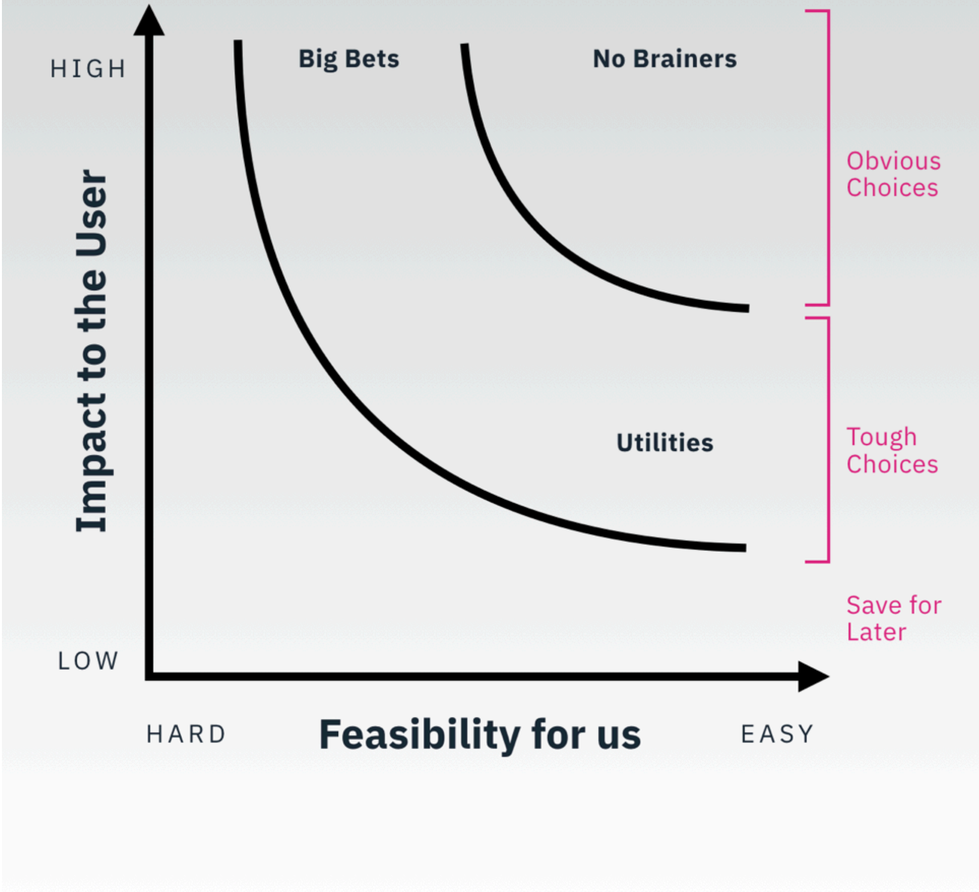
A prioritization grid helps to identify which ideas impact the user and are feasible for GSUSA to implement

A prioritization grid is a 2-D visual that shows the relative importance of a set of items based on two weighted criteria:

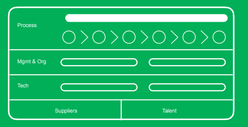
1. Importance
2. Feasibility

Regardless of what you are prioritizing, the criteria should always be derived from the overall goals of the project and business needs

It is a democratic way to assess the team's ideas and align on which ideas satisfy the varied needs of the user and the business



Five steps are required to create a prioritization grid



1

Establish items to prioritize

- Projects
- Ideas
- Features
- Jobs to be done
- User groups or personas
- Research activities

2

Write ideas and vote

- Individually capture ideas down on Post-it notes
- Group similar ideas together to form “big idea vignettes”
- Individually vote on each vignette

3

Draw chart and align items

- Draw two axes: Importance to the user (low to high) and feasibility for the organization (difficult to easy)
- Label the upper-right quadrant “no brainers,” the center-right “utilities” and top-right “big bets”
- Using votes as a guideline, place each item onto chart

4

Discuss and negotiate placement

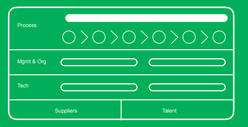
- Discuss results and compare items
- Collaboratively move items as needed

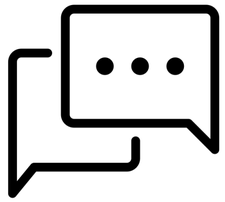
5

Share out and drive action

- Once alignment is reached, document the grid
- Share with relevant project stakeholders
- Create action plan and timeline

There are benefits from both the creation of the grid and the final artifact itself

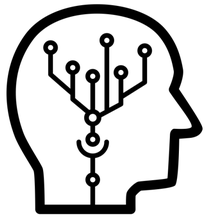




Facilitates important discussions

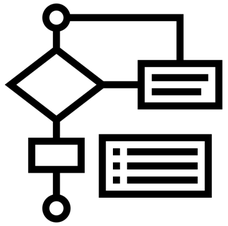
The process of creating a prioritization grid brings together a collaborative group to make decisions

The exercise promotes productive, structured conversation



Creates a shared mental model

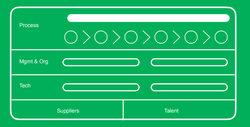
The final artifact represents a shared visual representation of collaborative ranking, rather than the opinions of any one individual



Provides structure and removes emotion

The prioritization grid is an easy and consistent method for evaluating options, It allows teams to make informed decisions regardless of emotion or bias

Tips for a successful prioritization grid



Feasibility is more than the tech

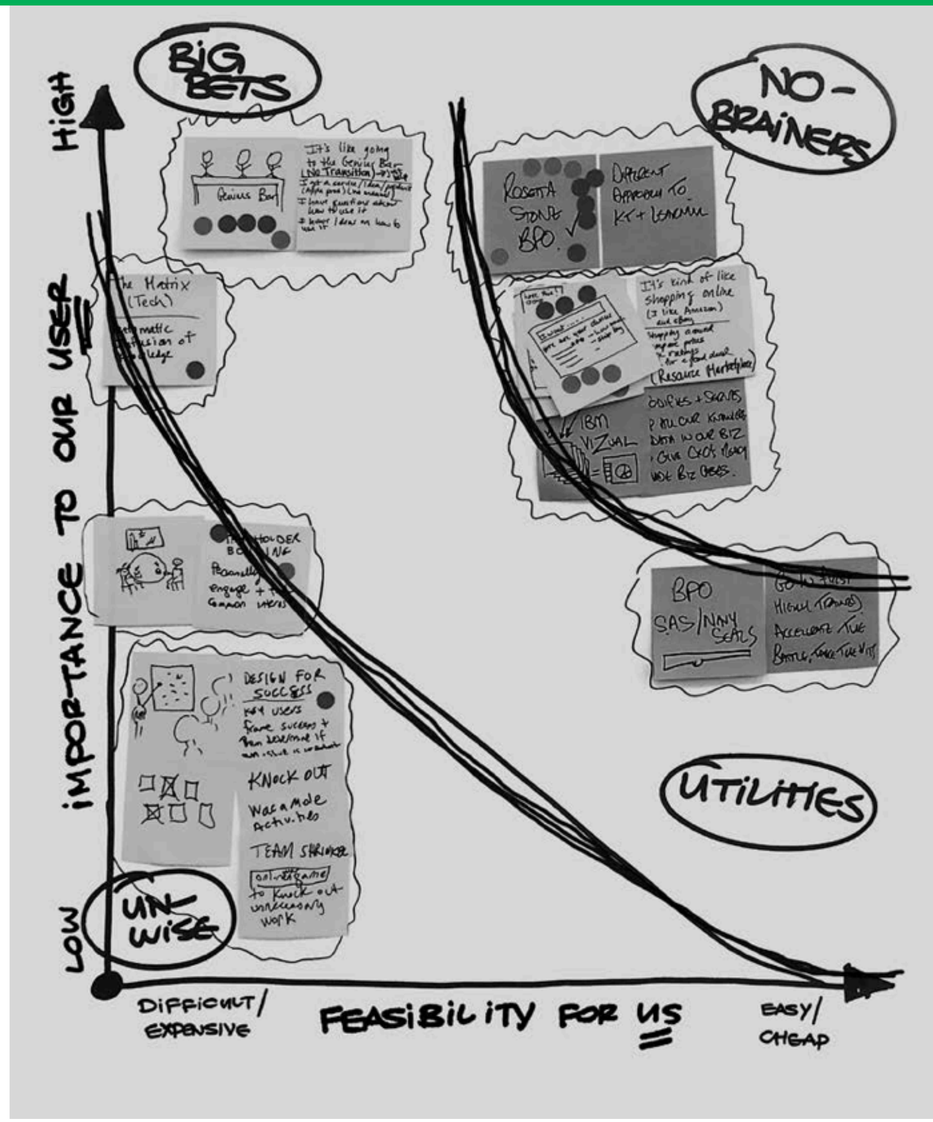
Feasibility includes elements such as your go-to-market strategy and your headcount capacity to deliver

No-brainers are everywhere

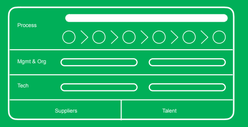
Your competitors will also be focused on the things that are highly important and feasible. Instead, focus your discussion on making “utilities” more impactful and on making “big bets” more feasible

Importance is important

Avoid considering only what is feasible, focus on what will have an important and market differentiating impact for the user

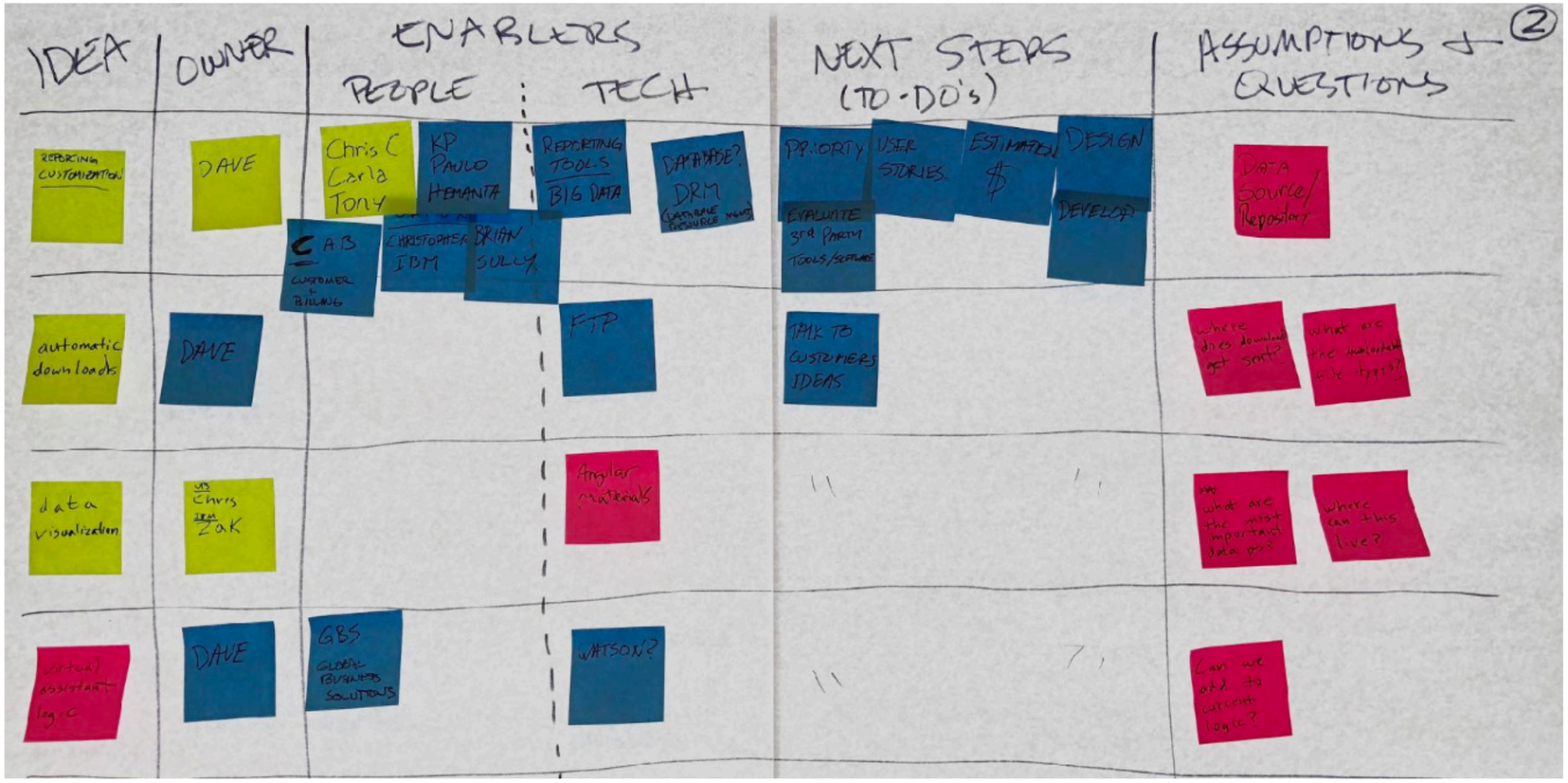


Once an idea has been decided upon, a key task map can be developed to allow teams to quickly assess the next steps

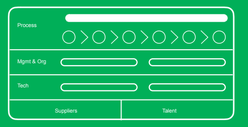


Components of a key task map include

- Idea
- Owner
- Enablers (People / tech)
- Next Steps (To-dos)
- Assumptions and questions



Idea brief template



Can be completed by

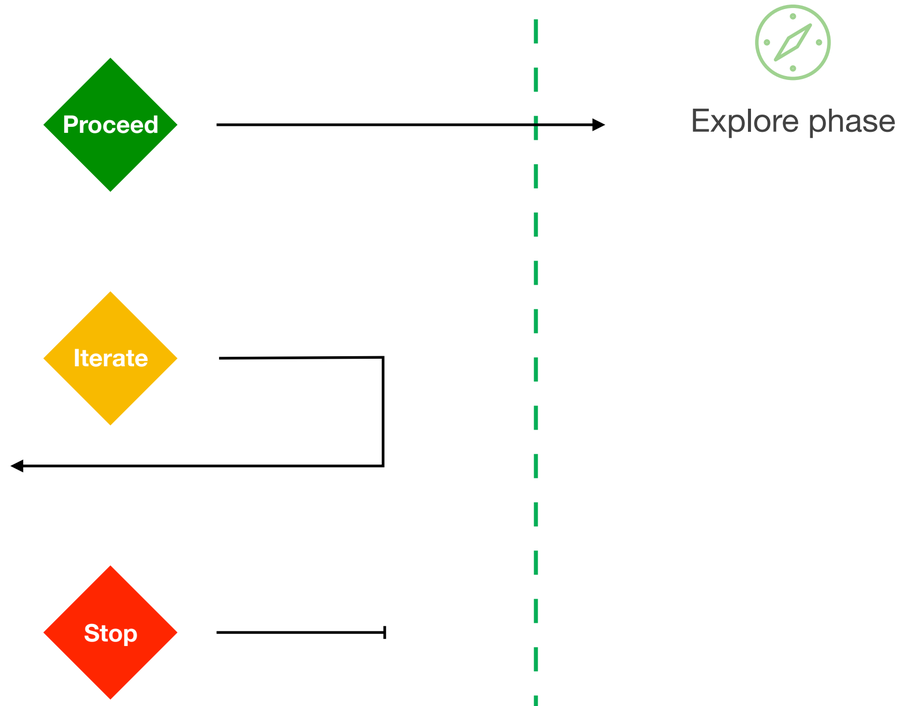
Experience strategist
and / or project manager

Idea brief

1. What is the core idea (stated as simply as possible)?
2. What is the underlying problem that the idea helps to address?
3. What is the context (data, trends, etc.) that surrounds the problem?
4. Which strategic priorities does the idea(s) align to?
5. How will we solve this problem? (What is the opportunity)?
6. Which persona(s) are we solving this problem for? (reference foundational personas documentation)
7. How will the idea impact the customer in a meaningful way?
8. How does the idea impact the business (costs, implementation, capabilities, etc.)?
9. Which Communities are required to bring this idea to life (MarComm, FD, Merchandising, etc.)?
10. Is the Experience Development Process the right forum for the idea?

Can be approved by

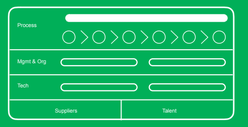
Experience lead, product owner
and/or “Gate” committee



Remember: regardless of how great a new idea is, it must:

- Fit within the best interest of the organization
- Solve a problem for a customer(s)
- Be scaleable

When the idea brief has received approval, it is time to move to the Explore phase



Plan

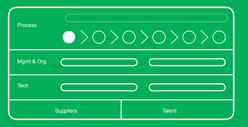
Screen

- Initial ideation, prioritization and validation
- Steering committee, business analyst and experience strategist

Explore → Envision → Enable → Engineer → Execute → Evolve

	Create	Test	Launch	Iterate
Activity	Develop business case and project brief Create the project vision Develop solutions for the project (sprint 0)	Create production (sprint 1 through x)	Run the project	Analyze, maintain, optimize
Team	Cross-functional team 1 Cross-functional team 2 Digital experience team	Digital experience team	Digital experience team	Digital experience team

Explore focuses on formalizing the approved idea into a project



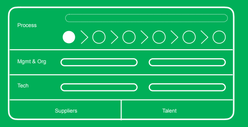
Plan

Explore › Envision › Enable › Engineer › Execute › Evolve

- Create project brief
- Perform any needed prioritization work on features and functionalities of the project (prioritization grid framework)
- Create the business case for selected project
- Size the level of effort (e.g., ROM)
- *Potential accelerator: Design Thinking*

Key Strategy sub-steps | Technology sub-steps

A project brief helps outline the impact of the idea on business objectives and strategy



Input

Define business objective and align strategic priorities

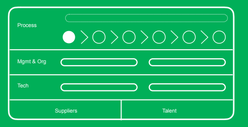
Develop proposed KPIs, costs and projections

Identify business requirements

Output

Project brief

Project brief template



Can be completed by

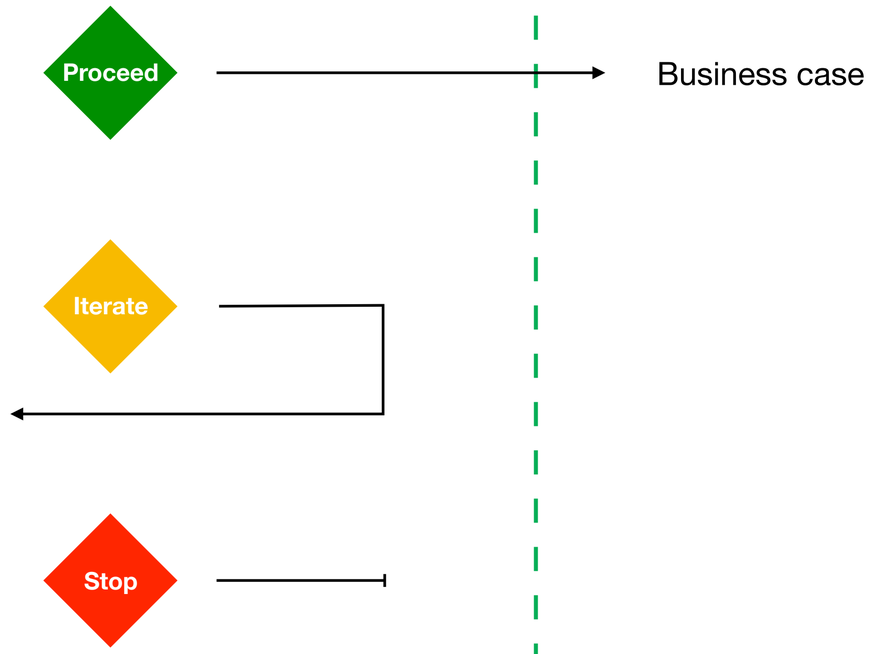
Experience strategist, project manager and / or business analyst

Project brief

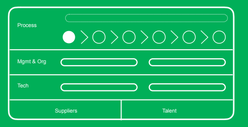
1. What is the business or marketing challenge we are trying to solve with this project?
2. Which business objective(s) and/or strategic initiative(s) does the project align to?
3. What is the opportunity for GSUSA?
4. Who is the customer(s) we are talking to?
5. What is the customer(s) desired action as a result of this project?
6. What does success look like? How will it be measured?
7. Budget and timing. What is the deadline and what is driving this deadline?
8. What is the budget range for the work?
9. Which Communities are required to create this project?
10. Who is responsible for approving this project?

Can be approved by

Experience lead, product owner and/or business lead



A product business case is a neutral, unbiased assessment of ideas that examines options and costs to lead to a project decision



Can be completed by

Project manager and / or business analyst

Business case

1. Provide a forecast of the product revenue, profit, loss and estimated time to break even
2. Define how the product will operate in the market. (What is the positioning and pricing strategy?)
3. Identify the teams required to build the product
4. Will any third party vendors be required to create this product?
5. Establish the project budget

Can be approved by

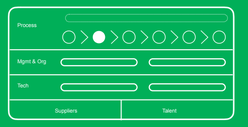
Product owner and / or business lead

Proceed → Envision phase

Iterate → back to business case

Stop

Envision brings the project to life



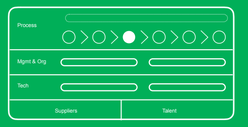
Plan

Explore > **Envision** > Enable > Engineer > Execute > Evolve

- Conduct user research (e.g., user and category research to inform experience mapping
- Update experience maps
- Hold Design Thinking session
- Refine documentation (incl. creative brief, brand, function, features, metrics and goals) and business requirements
- Conduct concept development
- Test concept
- Define functional requirements (as user stories)
- Plan timelines and milestones for next phase
- Define required technology services
- Define standards, policies, capacity and feasibility

Key Strategy sub-steps | Technology sub-steps

Enable is sprint 0



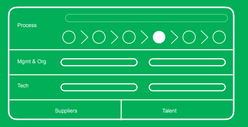
Plan

Explore > Envision > **Enable** > Engineer > Execute > Evolve

- Develop product backlog and scoring
- Design and architect MVP
- Provision and configure environments
- Configure software development lifecycle tooling (automation, version management, data management, develops toolchain)
- Develop test plan (automation, unit, functional, load, security, UAT, etc.)

Key Strategy sub-steps Technology sub-steps

Engineer focuses on production, starting with sprint 1 and cycles through sprint ‘x’



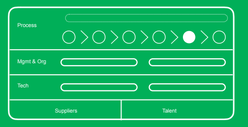
Plan

Explore > Envision > Enable > **Engineer** > Execute > Evolve

- Build initial MVP
- Release testing & integration QA
- Release packaging & deployment
- Conduct user testing
- Measure KPIs
- Develop customer service preparation plan (e.g., FAQs)
- Complete documentation

Key Strategy sub-steps | Technology sub-steps

Execute focus on running the project



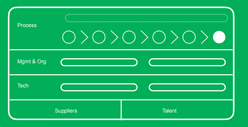
Plan

Explore > Envision > Enable > Engineer > **Execute** > Evolve

- Build updates, release and iterate
- Measure KPIs
- Plan support and updates of product
- Develop future briefs for optimization
- Update documentation
- Run reporting

Key Strategy sub-steps | Technology sub-steps

Evolve focuses on analyzing, maintaining and optimizing the project



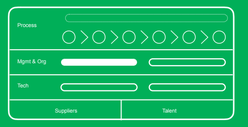
Plan

Explore > Envision > Enable > Engineer > Execute > **Evolve**

- Build updates, release and iterate
- Conduct additional customer interviews & research
- Conduct market assessment
- Prioritize features and updates
- Define product development and growth plan (incl. adoption, partnership considerations)
- Review build, buy and partner assessment

Key Strategy sub-steps | Technology sub-steps

Governance is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



Plan

Process

Explore → Envision → Enable → Engineer → Execute → Evolve

Management & organization

Governance

Agile

Technology

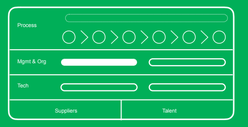
Service management & operations

Enterprise architecture

Suppliers

Talent

To be successful, the digital operating model must support a variety of requirements for the management and organization component



Management & organization

Governance

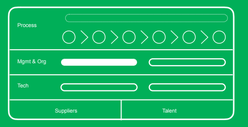
- **Funding & financial:** Adopt a portfolio approach for funding and financial planning for strategic initiatives and subsequent digital projects
- **Roles & responsibilities:** Ensure understanding of roles and responsibilities required to successfully manage and develop digital projects in the Experience Development Process
- **Capacity management:** Plan and manage appropriate resource capacity with a portfolio view for strategic initiatives
- **Technical governance:** Manage digital projects and technology architecture from a portfolio view to be reusable, integrated and measured
- **Metrics & measurement:** Manage digital projects based on agreed upon business metrics and provide an incentive model with intrinsic and extrinsic motivators for employees

Agile

- Develop agile values, principles, and practices that match with GSUSA's way of working for initial agile adoption
- Ensure executive support and education for agile adoption
- Identify a product / project group to implement guiding principles of the new way of working before scaling to other parts of the organization
- Design the team between IT and communities and allocate specific people to roles in order to implement agile gradually
- Engage in continuous improvement and iterative way of working

Governance sections

Five sections will guide the organization’s governance structure in the digital operating model



Funding & financial

Roles & responsibilities

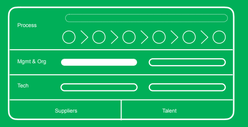
Capacity management

Technical governance

Metrics & measurement

Principles for funding

To support the digital operating model through better funding and financial practices, GSUSA must keep several principles in mind



Funding & financial | Roles & responsibilities | Capacity management | Technical governance | Metrics & measurement

1 Strategic initiative based

- Fund according to the strategic initiative rather than using project-specific funding mechanisms
- Ensure alignment of strategic initiatives with organizational goals
- Allocate resources and budget to projects (through strategic initiatives) that are prioritized

2 Planned

- Use data for accurate forecasting and cost projections
- Build slack into funding requests and projections so that teams can modify existing budgets if needs and timelines change
- Approve and review funding for the entire portfolio on a rolling basis (minimum twice annually)

3 Flexible

- Empower teams, allowing them to manage projects as the needs and timelines evolve
- Maximize unrestricted funds to apply to digital projects
- Only pursue restricted funds for projects that are high-value

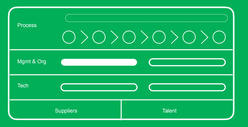
4 Measured

- Measure projects against core KPIs
- Use additional KPIs based on project and funding needs
- Track performance against benchmarks and adjust over time
- Use a standard process for every project approval and review decision

5 Integrated

- Communicate clear funding policies and approval processes
- Share outcomes and decisions from funding plans to relevant Communities and stakeholders
- Ensure all projects map back to outcomes to assist with ongoing fund development

Strategic initiative based funding promotes GSUSA's ability to deliver tangible results to its customers



Definition

Strategic initiative based funding is an approach to funding that is focused on delivering a tangible result for the customer by funding a strategic initiative, which feeds into a set of products and projects

Funding is prioritized and obtained based on the strategic initiatives set by the executive team. The funding is then allocated to products and projects according to need and desired customer outcome

Example

The "Volunteer" strategic initiative is established to support an identified goal. A list of products that help deliver the "Volunteer" strategic initiative are identified. From there, a list of projects delivering features for the "Volunteer" are identified, prioritized, and the first project, a VOLP integration with mobile, is funded

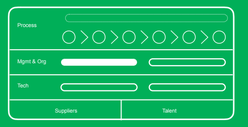
The project is reviewed in flight and the funding prioritization for all "Volunteer" projects are re-evaluated and modified if necessary

Benefits

Organizing funding around strategic initiatives offers substantial benefits to the organization, including:

- higher quality in customer outcomes since all projects and products will have been directly tied to a strategic initiative
- greater flexibility to adjust funding for individual projects or products

Funding in the Experience Development Process will require a series of one-time and ongoing actions



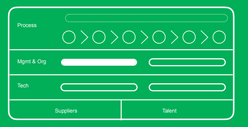
● **Funding & financial** ○ Roles & responsibilities ○ Capacity management ○ Technical governance ○ Metrics & measurement

Plan	Explore	Envision	Enable	Engineer	Execute	Evolve
Initial ideation, prioritization, and validation	**Develop business case and project brief**	**Create the project vision**	**Develop solutions for the project (sprint 0)**	**Create production (sprint 1 through x)**	**Run the project**	**Analyze, maintain, optimize**
• Identify and prioritize strategic initiatives • Map funding requests to strategic initiatives • Finalize funding requirements • Finalize and approve budgets for strategic initiatives	• Identify projects with funding from strategic initiatives • Develop funding for specific projects • Set up performance tracking based on project needs	• Allocate resources to strategic initiatives and to projects • Begin performance tracking for reporting • Reassess resources and funding required for Enable	• Reassess resources and funding required for Engineer • Review project to determine if proposed solution meets financial criteria	• Reassess resources and funding required for Execute	• Reassess resources and funding required for Enable • Determine funding mechanism and reporting standard for future scaled projects	• Tie project funding to outcomes • Submit financial readout reports based on project needs in an ongoing fashion • Refresh budgets with actuals

Update budgets, adjust funding and resources, track performance against required financial reporting, internal KPIs and intended project outcomes

Communicate decisions and outcomes to relevant parties in other parts of the organization

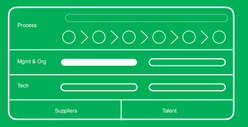
To begin implementing strategic initiative based funding at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



● **Funding & financial** ○ Roles & responsibilities ○ Capacity management ○ Technical governance ○ Metrics & measurement

	Requirement	Next steps
1	Strategic initiative based	Educate key stakeholders on strategic initiative based funding, gaining buy-in in anticipation of a controlled pilot
2	Planned	Map funding requests for strategic initiatives to organizational goals
3	Flexible	Empower strategic initiative owners (e.g., integration managers) to recommend the strategic initiative based funding mechanism at the portfolio level
4	Measured	Align on performance KPIs required for financial reporting across all strategic initiatives and projects and integrate them into a standard process for approval and review of planned and in-flight projects
5	Integrated	Work with a small group of relevant stakeholders to help them understand funding changes, budget implications and forecast implications
6	Controlled	Test strategic initiative based funding with one strategic initiative (e.g., volunteer) before scaling across the enterprise

Five sections will guide the organization’s governance structure in the digital operating model



Funding & financial

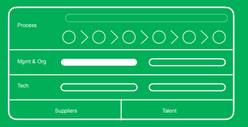
Roles & responsibilities

Capacity management

Technical governance

Metrics & measurement

To support the digital operating model through the enterprise governance structure, GSUSA must keep several principles in mind



1

Strategic initiatives

- Develop strategic initiatives based on the organizational goals set by the executive team
- Provide a governing body visibility into all strategic initiatives
- Align projects to the strategic initiatives, understanding that each strategic initiatives may have more than one project
- Allow for Community SME input and feedback to project-level work

2

Portfolio governance

- Allow an enterprise governing body to set standards and policies
- Empower a governing body to oversee and manage all strategic initiatives, products and projects
- Manage projects through appropriate oversight channels
- Allow for ongoing IT and business operations services

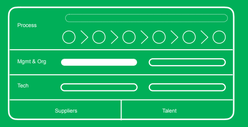
3

Operational foundations

- Acknowledge the need for ongoing IT service management and business management as a foundation for the organization
- Empower IT service management to support internal and customer experience focused project delivery

Principles for team roles

To support the digital operating model through clear roles and responsibilities at a project team level, GSUSA must keep several principles in mind



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

1 Cross functional

- Bring individuals with varying expertise together as a team to achieve the shared goal
- Understand the responsibilities and skills required for each role on the team
- Apply the cross-functional teams to each step of the Experience Development Process to achieve project success

2 Empowered

- Communicate expectations on team roles and responsibilities
- Create teams with the skills necessary to successfully complete the project
- Allow managers to make decisions at the project level with guidance and oversight from strategic initiative managers (e.g., integration managers)

3 Flexible

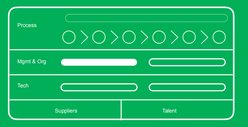
- Leverage employee skillsets to meet the changing needs of the team
- Use fractional staffing as a way to maximize employee time to accomplish project objectives

4 Measured

- Align on KPIs for teams and functional roles within the teams
- Ensure standardized expectations for similar functional roles across teams in the organization (e.g., job families)
- Measure teams against agreed-upon KPIs and metrics

.

A number of teams with unique responsibilities are required to successfully move through the Experience Development Process



Cross functional team 1:

- Strategically minded project team that takes the ideas developed in the plan step to select ideas
- Includes:
  - Project manager
  - Business analyst
  - Experience strategist
  - Product owner

May be combined

Cross functional team 2:

- Determine projects from ideas formed in plan phase
- Includes:
  - Project manager
  - Business analyst
  - Experience strategist
  - Product owner
  - User experience lead
  - User interface designer
  - Design Thinking workshop facilitator
  - Copywriter and content manager

May be combined

May be combined

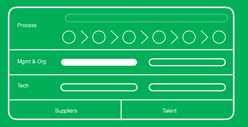
Digital experience team:

- Focused on building, developing, and executing the project
- Includes:
  - Project manager
  - Business analyst
  - Experience strategist
  - Product owner
  - User experience lead
  - User interface designer
  - Copywriter and content manager
  - Architect
  - API developer
  - Front end developer
  - Back end developer
  - QA specialist

May be combined

May be combined

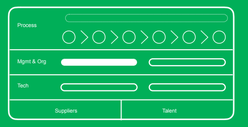
Each step in the Experience Development Process requires a series of unique individuals in teams best created through leveraging employees



Key:
- 100% of FTE
- 75% of FTE
- 50% of FTE
- 25% of FTE
- Outsource threshold

Plan	Explore	Envision	Enable	Engineer	Execute	Evolve
Initial ideation, prioritization, and validation	Develop business case and project brief	Create the project vision	Develop solutions for the project (sprint 0)	Create production (sprint 1 through x)	Run the project	Analyze, maintain, optimize
Steering committee						
Project manager						
Product owner						
Business analyst						
Experience strategist						
Digital product copywriter						
Content manager						
Design Thinking facilitator						
User interface designer						
User experience designer						
Architect						
API developer						
Front-end developer						
Back-end developer						
QA specialist						

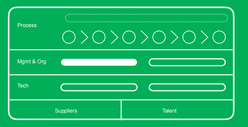
Specific roles with required responsibilities and associated skills conduct the work in the Experience Development Process



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

Role	Responsibilities	Skills
API developer	• Develop, bound and model software APIs that provide the building block for the data moving in and out of the application • Translate business and functional requirements into API specifications, and analyze their impact on the software to be built to meet them • Support the testing, deployment and optimization of the application	• Experience developing new interfaces and integrations • Good interpersonal and written communication skills • Ability to estimate tasks and track work • Knowledge of API gateways and back-end for front-end (BFF) systems • Ability to work well with a cross functional team • Written and verbal communication skills to share expertise with project managers
Architect	• Design the project's technology solution with the organization's enterprise architect according to EA and technology governance • Analyze and maintain application and integration methodologies and frameworks • Communicate technology solution design expertise with project stakeholders	• Written and verbal communication skills to share expertise with project managers • Application knowledge in Salesforce, Adobe, Hybris, etc. • Ability to assimilate, interpret and draw conclusions from tech and business data • Knowledge of application capacity and dependencies • Ability to work well with a cross-functional team
Back-end developer	• Design and develop the application functional layer integration with database • Ensure integration with front-end layer • Support the testing, deployment and optimization of the application	• Knowledge of back-end technologies and frameworks • Excellent use of coding that is reusable in design • Written and verbal communication skills to share expertise with project managers • Ability to work well with a cross functional team
Business analyst	• Coordinate with business teams to gather business requirements and user requirements • Communicate with SMEs to map stages of data transformation and document current and future workflows • Document functional requirements that describe the system, process, or product to fulfill business requirements • Functions as IT advisor to the business units	• Excellent written and oral communications skills with the ability to work in a cross-functional team environment • Analytic ability to translate business and user needs into functional requirements that IT will understand

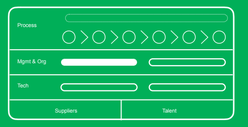
Specific roles with required responsibilities and associated skills conduct the work in the Experience Development Process



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

Role	Responsibilities	Skills
Content manager	• Work with product owner to craft the content strategy for the product • Oversee team of product copywriters to ensure copy is in line with the brand strategy and strategic initiatives • Own the content planning process, working cross-functionally to set timing expectations for each content stage • Work with digital and creative teams to implement best practices for content management • Monitor performance analytics to help provide insight into content performance	• Experience managing teams • Ability to work in a cross functional teaming environment • Excellent writing, editing and presentation skills with experience presenting to mid-senior level executives • Analytic abilities • Experience in planning content development and voice of the customer
Design Thinking facilitator	• Facilitates and leads the Design Thinking workshop	• Excellent communication skills with the ability to work with team members from different parts of an organization • Trained in Design Thinking methodologies • Presentation skills to facilitate and lead a Design Thinking workshop
Digital product copywriter	• Create customer facing copy for product, brand and creative experiences • Drive and deliver the GSUSA brand vision and voice within the context of the experience • Create a unified product voice that connects and resonates with GSUSA customers • Align copy to work with the overarching business goals and initiatives	• Ability to collaborate with teams in the organization to inspire the voice of the customer • Excellent writing, editing and presentation skills with experience presenting to mid-senior level executives
Experience strategist	• Conduct user research to understand users, goals, environments and pain points to apply these findings in designs and write idea and project brief • Contributes to Design Thinking workshops and materials • Develop actionable experience strategies from user insights, market insights, service design and data analysis	• Ability to conduct qualitative and quantitative user research and knowledge of research tools • Knowledge of best-in-class user experiences • Ability to facilitate workshops and brainstorming sessions • Ability to understand customer requirements and user needs • Excellent collaboration, communication and presentation skills

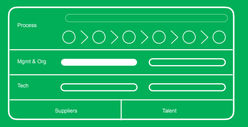
Specific roles with required responsibilities and associated skills conduct the work in the Experience Development Process



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

Role	Responsibilities	Skills
Experience strategy lead	• Provide leadership on the vision of the experience strategy • Manage the experience strategist • Contributes to Design Thinking workshops and materials	• Experience in guiding clients to their experience strategy vision • Knowledge of crafting user research proposals • Knowledge of best-in-class user experiences • Excellent collaboration, communication and presentation skills • Experience managing teams
Front-end developer	• Design and develop the application experience layer (JavaScript, CSS, HTML) • Apply consistent architecture patterns and modern front-end frameworks for development • Support the testing, deployment and optimization of the application	• Experience in application development, including fluency in front-end development frameworks (e.g., Angular, React) • Written and verbal communication skills to communicate expertise with PMs • Ability to work well with a cross functional team
Integration manager	• Coordinate with peer integration managers in the EPMO to provide visibility for all strategic initiatives simultaneously at the portfolio view • Provide portfolio level support through capacity management planning and funding • Set performance KPIs and communicate to product owners and project managers • Manage an individual strategic initiative, set and communicate priorities to product owners • Communicate with C-level organization leaders to receive strategic priorities and provide readouts on strategic priority product and project progress	• Excellent writing, editing and communication skills with an ability to work in a cross-functional team environment • Strategic thinking and analytic capabilities, with the ability to synthesize ideas and create tactical action plans • Experience with executive (C-level) presentations • Management and oversight experience • Product management and/or project manager experience • Excellent relationship management skills with individuals and teams working across the organization

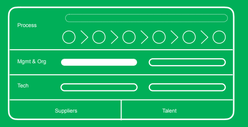
Specific roles with required responsibilities and associated skills conduct the work in the Experience Development Process



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

Role	Responsibilities	Skills
Product owner	• Accountable for the success or failure of the product • Oversee more than one project that aligns to a strategic initiative • Liaise with project managers overseeing specific projects to provide strategic input and escalate and solve for risks • Act as the approver for all project level decisions for projects that roll up to the program manager	• Excellent writing, editing, and communication skills with an ability to work in a cross-functional team environment • Strategic thinking and analytic capabilities, with the ability to synthesize ideas and create tactical action plans • Product management experience • Management and oversight experience
Project manager	• Manage one project at the business unit level (e.g., Community) and reports back to the relevant program manager • Create and run project plans that best fit the project (agile, waterfall, hybrid), that include metrics and performance tracking • Manage the cross-functional project team and liaise with the program manager • Develop capacity and demand management plans for appropriate resources per project	• Excellent writing, editing, and communication skills with an ability to work in a cross-functional team environment • Knowledge of SDLC, agile, and other project management best practice ways of operating • Ability to conduct capacity and demand planning • Project management experience
QA Specialist	• Develop and implement QA processes and procedures including test/use cases • Perform testing of applications, facilitate testing by others and document results	• Knowledge of best practices for QA processes and procedures and the ability to plan testing • Written and verbal communication skills to share expertise with project managers • Ability to work well with a cross functional team
User experience designer	• Transform business requirements, user research and user feedback into product designs • Create intuitive user interactions, workflows, mock-ups, wireframes and prototypes	• User experience research and design experience • Proficient in using modern research and design tools for wireframing and prototyping • Excellent collaboration, communication and presentation skills

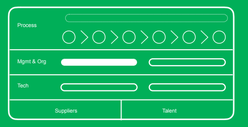
Specific roles with required responsibilities and associated skills conduct the work in the Experience Development Process



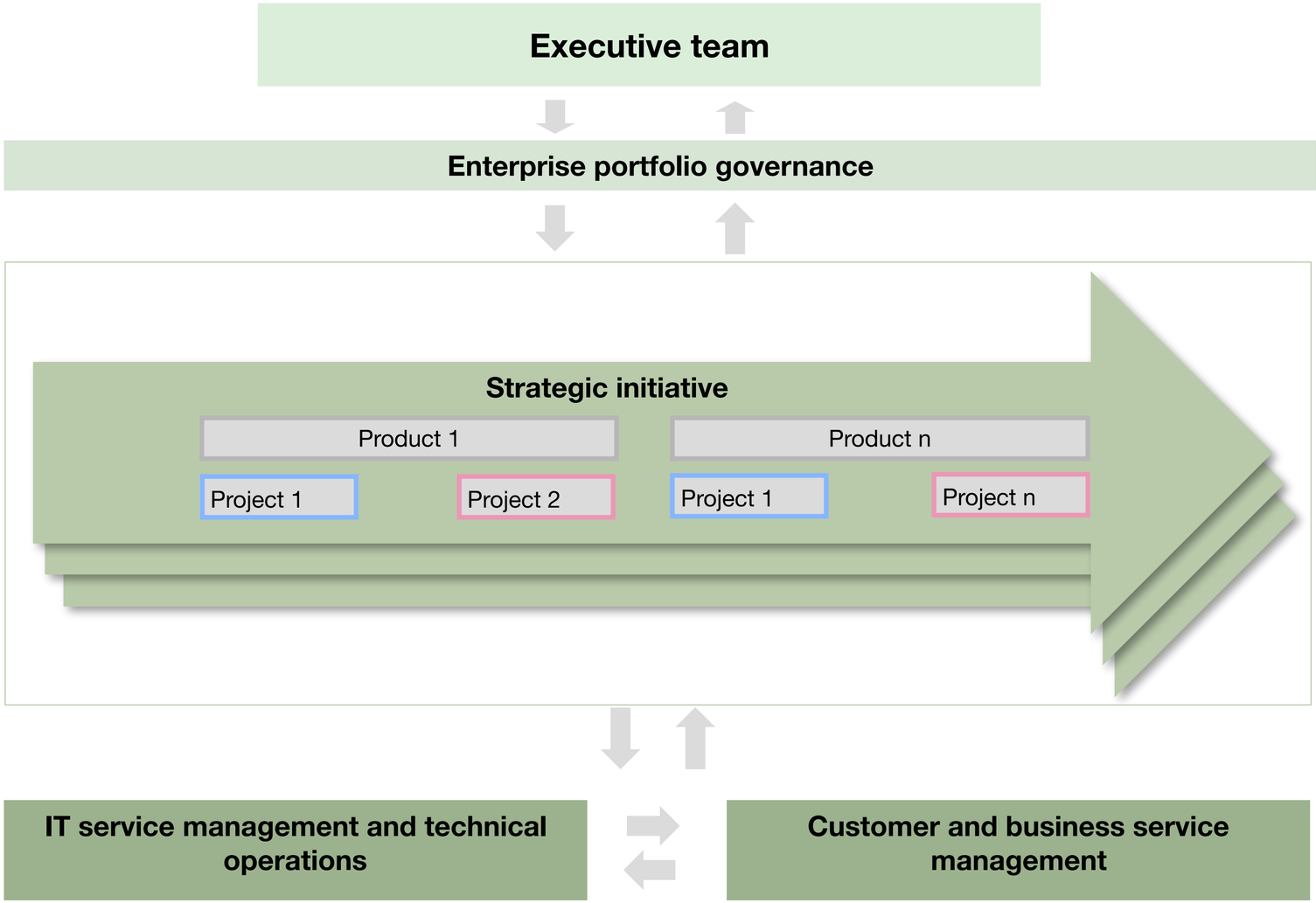
Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

Role	Responsibilities	Skills
User experience lead	• Own the entire design of the product or domain, including all technical and business responsibilities • Manage the user experience designer	• Knowledge of UX design principles • Experience building digital products end-to-end • Excellent technical research and design skills • UX designer management experience • Excellent collaboration, communication and presentation skills
User interface designer	• Develop user guides and story lines • Facilitate design research and customer analysis • Create UI responsive design prototypes • Design UI taxonomies	• Excellent collaboration, communication and presentation skills • Proficient in using tools and technologies to assist with design, graphics and UI prototypes • Design research experience

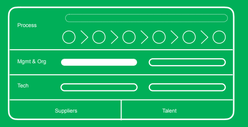
Products managed through the Experience Development Process roll up to product owners and then to integration managers for a portfolio view of governance



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement



The executive team will set the strategic initiatives and priorities and communicate to the portfolio governance body



○ Funding & financial ● **Roles & responsibilities** ○ Capacity management ○ Technical governance ○ Metrics & measurement

FUNCTION

The C-Suite sets strategic initiatives and priorities and approves budgets and funding

Executive team

Enterprise portfolio governance

Strategic initiatives:

Strategic initiative

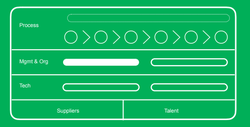
Product 1 | Product n

Project 1 | Project 2 | Project 1 | Project n

IT service management and technical operations

Customer and business service management

The enterprise portfolio governance body will have visibility into all strategic initiatives, coordinate dependencies and manage individual strategic initiatives



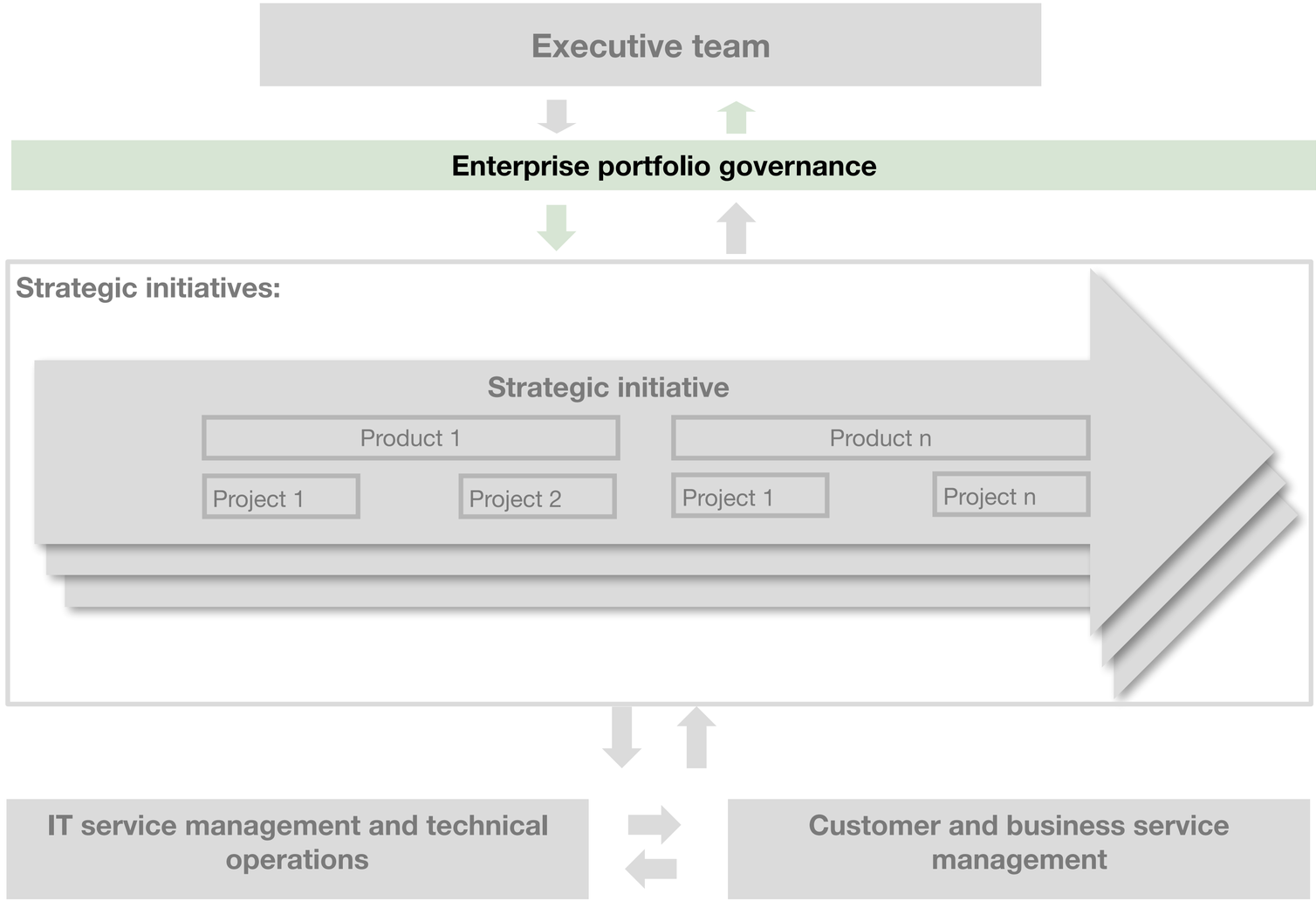
○ Funding & financial ● **Roles & responsibilities** ○ Capacity management ○ Technical governance ○ Metrics & measurement

FUNCTION

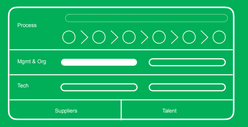
At the portfolio level, an **integration manager provides portfolio visibility across all strategic initiatives**, monitors and manages resource capacity across the portfolio, and facilitates evaluation and approval processes for projects

Integration managers also develop project, product and portfolio **management standards, policies** and tools across the enterprise

Enterprise business analysts **coordinate and manage cross-project efforts,** including dependencies



Each integration manager manages one strategic initiative comprised of product(s) owned by product owners and project(s) owned by project managers



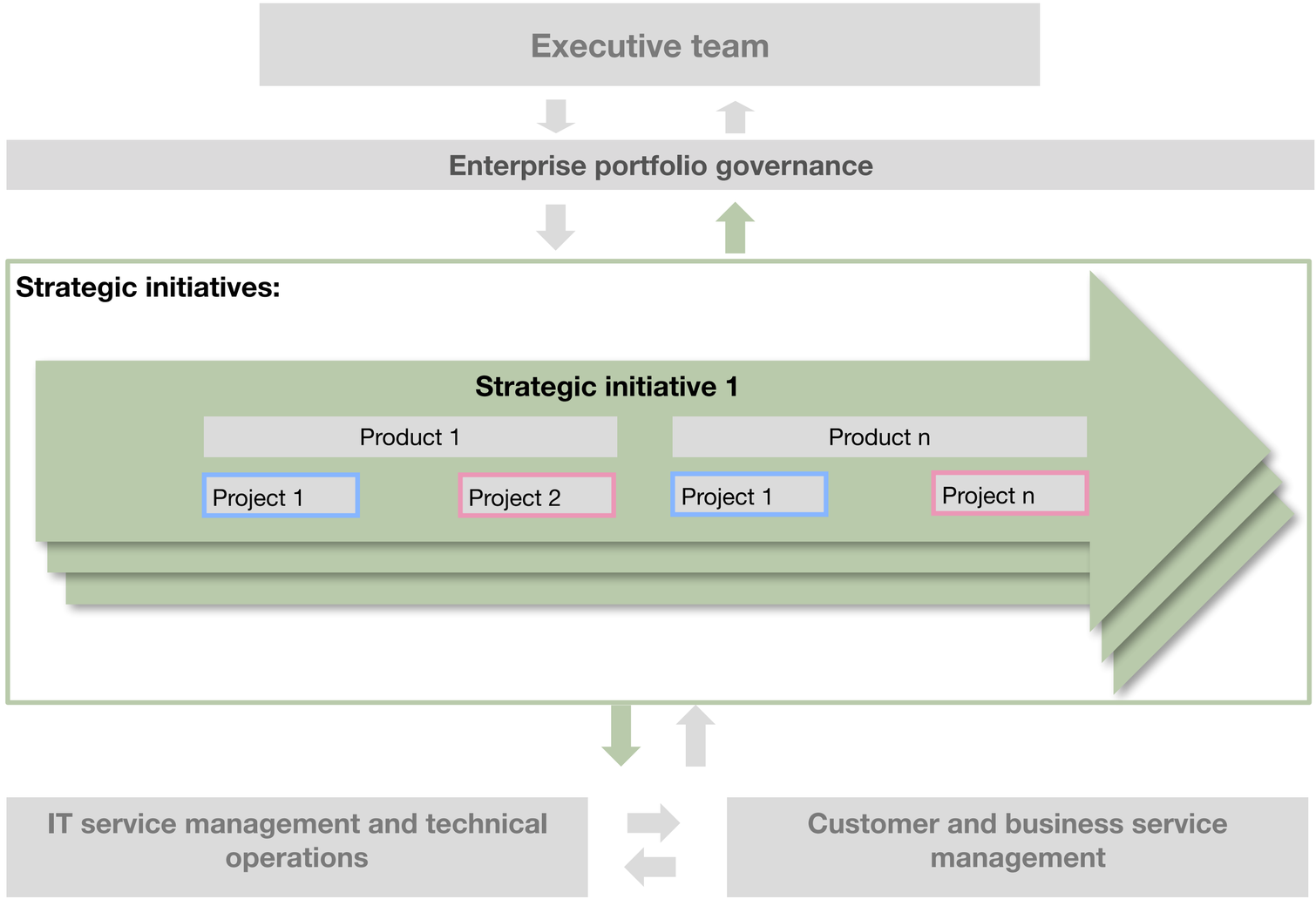
Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

FUNCTION

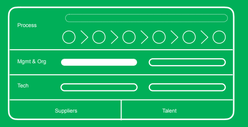
The product and aligned project(s) roll up to the **strategic initiative managed by the integration manager**

The product is managed by the **product owner, who has full accountability over the product**

A **project manager** owns a project that aligns to a product



Example



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

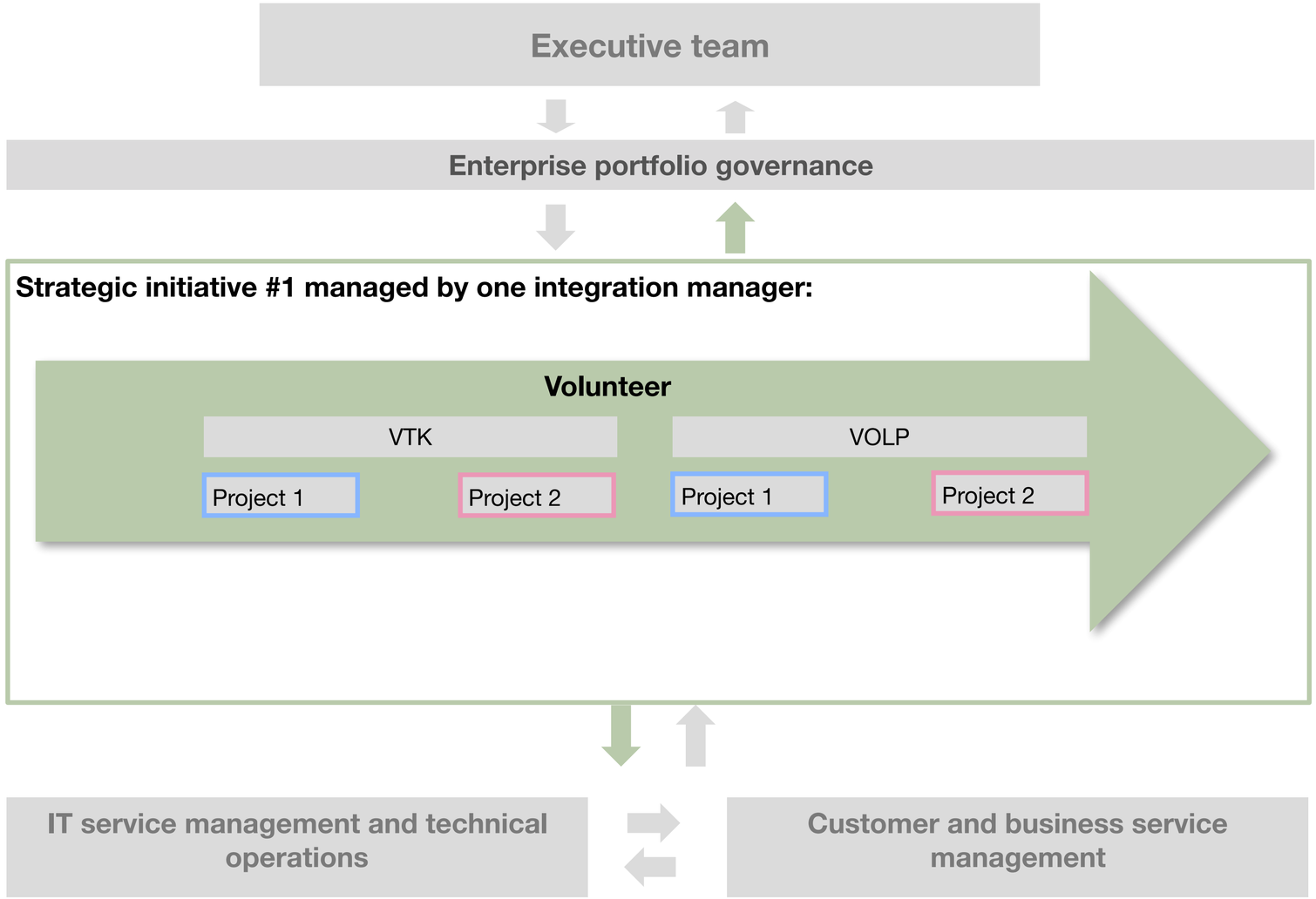
FUNCTION

The integration manager manages the **volunteer strategic initiative**

In the volunteer strategic initiative, **there are two products**, VTK and VOLP

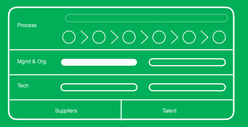
VTK is managed by a product owner and VOLP is **managed by a product owner**

Each product has two **projects, each managed by a project manager**



*Illustrative example

An underlying IT service management and customer and business service management foundation is required to support all projects

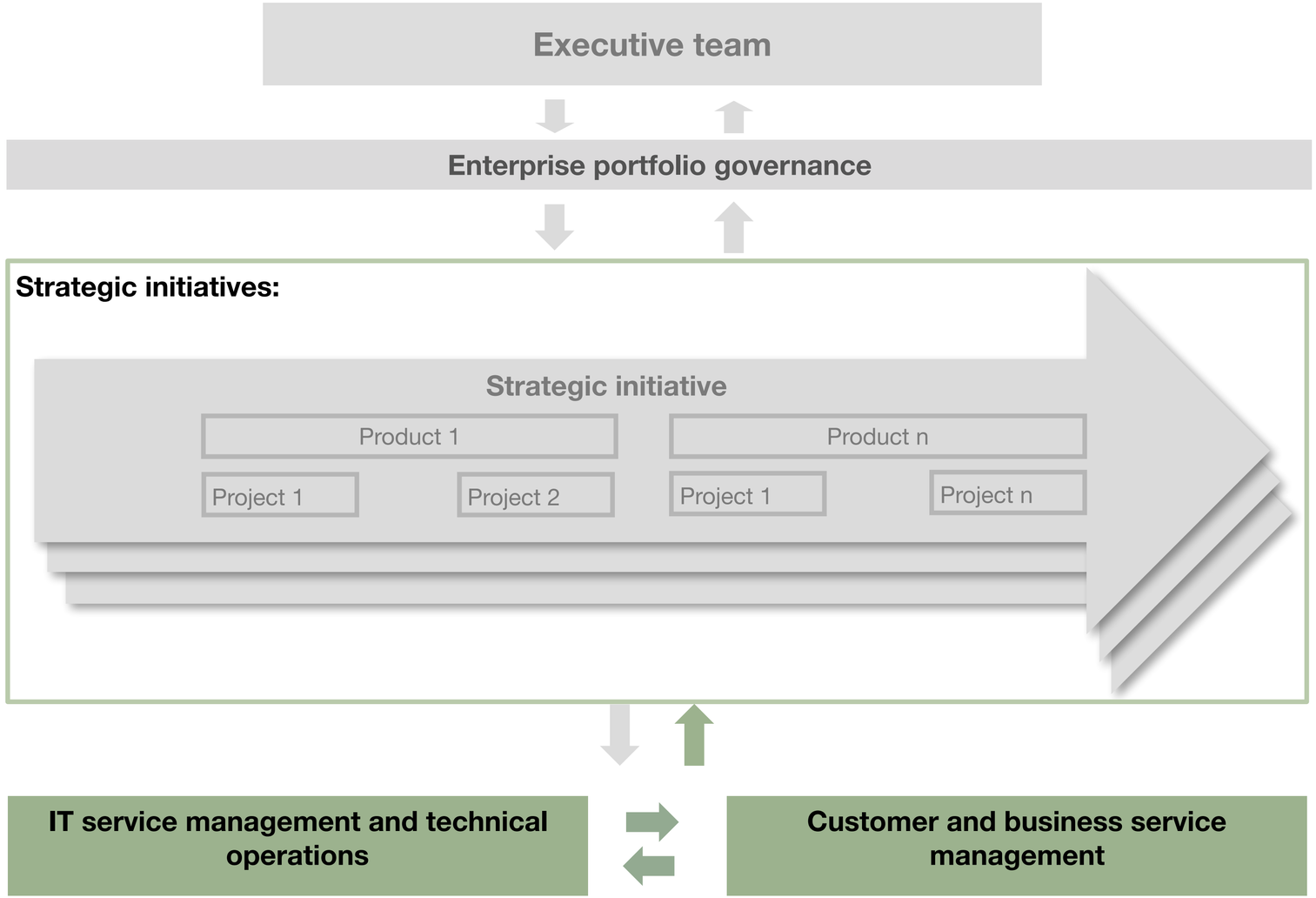


Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

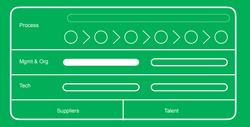
FUNCTION

IT functions and shared services that run and monitor systems and support users

GSUSA help desk and council customer care manage end user contact for service management functions



Products managed through the Experience Development Process roll up to product owners and then to integration managers for a portfolio view of governance



Funding & financial | **Roles & responsibilities** | Capacity management | Technical governance | Metrics & measurement

FUNCTION

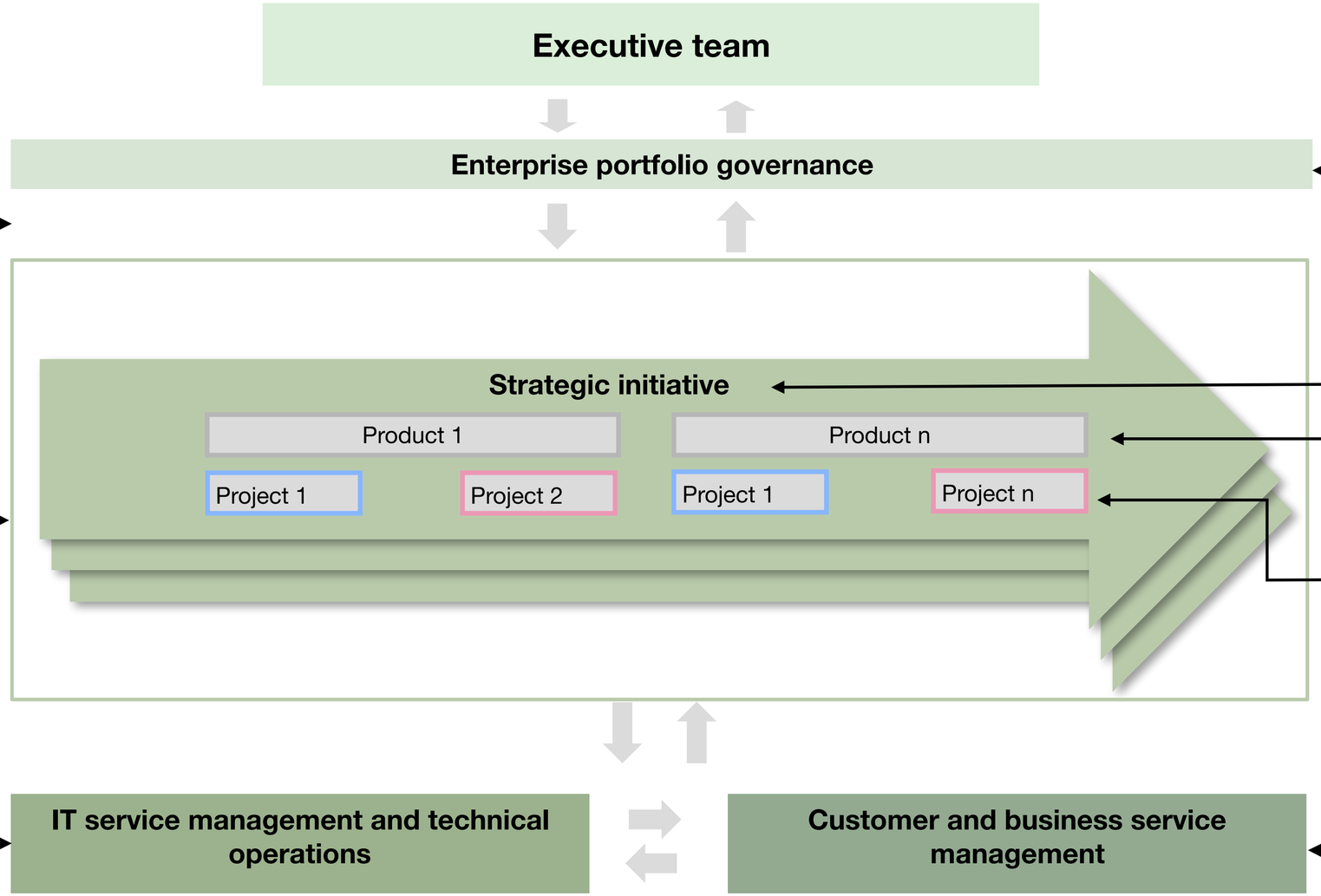
Provide portfolio visibility across all strategic initiatives

Strategically, evaluate, fund and manage strategic initiatives

Tactically, coordinate and manage cross-project dependencies

The product and aligned project(s) rolls up to the strategic initiative, managed by the integration manager

IT functions and shared services that support all projects, products and strategic initiatives



ROLE

Enterprise integration managers manage strategic initiatives at portfolio level

Business analysts coordinate the cross-project dependencies

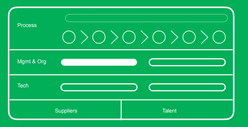
An integration manager oversees the strategic initiative

A product owner manages the product end-to-end

Project managers own individual projects that align to a product

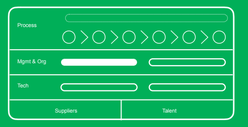
GSUSA help desk and council customer care manage end user contact for service management functions

To implement new roles and responsibilities practices at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



	Requirement	Next steps
1	Cross-functional	Map recommended roles and skills in the Experience Development Process to the roles and skills currently held at GSUSA to understand current capabilities and needs
2	Empowered	Allow decision makers and influencers in the governing body (e.g., integration managers) to have a holistic view over strategic initiatives and projects to create a sense of empowerment among teams
3	Flexible	Identify projects and types of roles that can be leveraged for a structured fractional staffing model
4	Measured	Align on agreed upon KPIs and metrics to the project team level
5	Controlled	Start the new roles and responsibilities empowered staffing model with one strategic initiative before scaling to other projects in the organization

Five sections will guide the organization’s governance structure in the digital operating model



Funding & financial

Roles & responsibilities

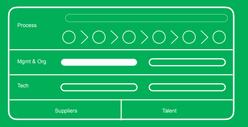
Capacity management

Technical governance

Metrics & measurement

Principles for capacity management

To support the digital operating model through better capacity management, GSUSA must keep several principles in mind



Funding & financial | Roles & responsibilities | **Capacity management** | Technical governance | Metrics & measurement

1 Fact-based

- Establish and use a clear fact base
- Use fact base to make projections
- Create a rules based project approval and prioritization process using existing facts

2 Measured

- Measure projects against core KPIs
- View demand and capacity holistically for resources in all initiatives including digital and foundational initiatives
- Track performance against benchmarks and adjust over time

3 Empowered

- Owned by one business unit
- Support demand and capacity management through tooling
- Make decisions quickly, including to kill projects

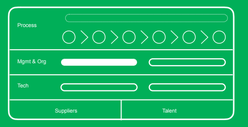
4 Flexible

- Adjust resourcing based on changing business and project demands
- Have a clear and rational exception process
- Incorporate slack in project and staffing projections

5 Integrated

- Receive clear and unified direction from C-Suite
- Communicate decisions and facts from enterprise-wide capacity planning and management for digital flow through to the rest of the organization

Capacity management in the Experience Development Process will require a series of one-time and ongoing actions



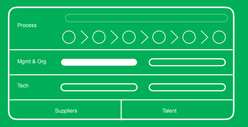
Funding & financial | Roles & responsibilities | **Capacity management** | Technical governance | Metrics & measurement

Plan	Explore	Envision	Enable	Engineer	Execute	Evolve
Initial ideation, prioritization, and validation	**Develop business case and project brief**	**Create the project vision**	**Develop solutions for the project (sprint 0)**	**Create production (sprint 1 through x)**	**Run the project**	**Analyze, maintain, optimize**
• Refresh consistent project facts (e.g., resource costs) • Identify and prioritize digital projects • Check skills map, staff availability • Determine staffing and skills needs starting with Explore • Understand dependencies and demand between projects	• Create project staffing plan with planned slack • Reassess staffing needs for Envision (experience focused) and allocate resources accordingly • Set up performance tracking	• Reassess staffing needs for initial sprint steps (development focused) and allocate resources accordingly • Begin tracking performance against plan	• Reassess staffing needs for Engineer (development focused) and allocate resources accordingly • Understand dependencies and demand between projects from Engineer to Evolve	• Reassess staffing needs for Execute (development focused) and allocate resources accordingly	• Determine staffing needs for Evolve	• No action required

Update plans, adjust resources as needed, track performance against plans

Communicate decisions and outcomes to relevant parties in other parts of the organization

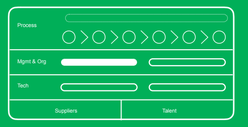
To implement improved capacity management at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



Funding & financial | Roles & responsibilities | **Capacity management** | Technical governance | Metrics & measurement

	Requirement	Next steps
1	Fact-based	Map existing skillsets to skillsets required in the Experience Development Process and collect internal facts on all project capacity demands, including digital and technology foundational projects
2	Measured	Compare capacity demands across digital projects internally, and align on appropriate KPIs for initial project
3	Empowered	Determine owner of the capacity management process for the digital operating model
4	Flexible	Empower the owner of the process to make decisions without heavy C-suite input or too many meetings
5	Integrated	Establish a forum for capacity management updates related to the digital operating model to be shared with the smallest number of relevant internal stakeholders
6	Controlled	Test this approach on a small use case with one project initially before scaling to other projects

Five sections will guide the organization’s governance structure in the digital operating model



Funding & financial

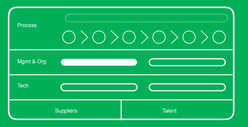
Roles & responsibilities

Capacity management

Technical governance

Metrics & measurement

To support the digital operating model through better technical governance, GSUSA must keep several principles in mind



1

Practical

- Tailor governance practices to comply with Experience Development Process model stage gates
- Balance needs of long term enterprise initiatives and short term projects

2

Process-driven

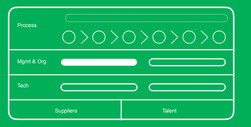
- Create common defined process workflows and cadence for technology review and decision making across products and project teams
- Establish governance team with clear roles and responsibilities and decision rights for multi-product and multi-team scenarios
- Define minimum entry criteria for entering governance process (information, templates, pre-approvals)
- Enforce governance workflow compliance across enterprise

3

Visible

- Formalize a communication plan for technology governance
- Develop an enterprise-owned toolset to control:
  - current backlog of proposals, issues, risks, etc.
  - past architectural decisions and actions
  - technology policies, principles and standards
  - review board calendar and agenda
  - guidance on technology governance process workflow, RACI and tool usage

Technical governance in the Experience Development Process will require a series of one-time and ongoing actions



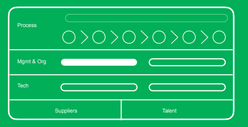
○ Funding & financial ○ Roles & responsibilities ○ Capacity management ● **Technical governance** ○ Metrics & measurement

Plan	Explore	Envision	Enable	Engineer	Execute	Evolve
Initial ideation, prioritization, and validation	**Develop business case and project brief**	**Create the project vision**	**Develop solutions for the project (sprint 0)**	**Create production (sprint 1 through x)**	**Run the project**	**Analyze, maintain, optimize**
• Establish enterprise technology standards and policies	• Establish technology evaluation criteria • Ensure technology gaps and risks are identified	• Review high level technology solution strategy • Ensure enterprise standards and policies are included in requirements	• Review detailed technology approaches • Confirm technology standards and policies incorporated in plans	• Review and manage technology design changes / exceptions	• Review and manage technology design changes / exceptions • Confirm technology and security policy compliance have been validated	• Update common process, policies and standards based on feedback from project

Update budgets and timelines, adjust funding and resources, track performance against governance policies, requirements, and standards

Communicate decisions and outcomes to relevant parties in other parts of the organization

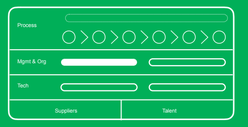
To implement new technical governance practices at GSUSA successfully, the IBM team has outlined initial perspectives on a few requirements



Funding & financial | Roles & responsibilities | Capacity management | **Technical governance** | Metrics & measurement

	Requirement	Next steps
1	Practical	Develop enterprise standards for defining technical quality requirements
2	Integrated	Create a standard enterprise repository of policies, standards and requirements
3	Measured	Develop reporting function to measure adherence to policies and standards

Five sections will guide the organization’s governance structure in the digital operating model



Funding & financial

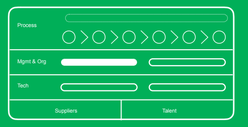
Roles & responsibilities

Capacity management

Technical governance

Metrics & measurement

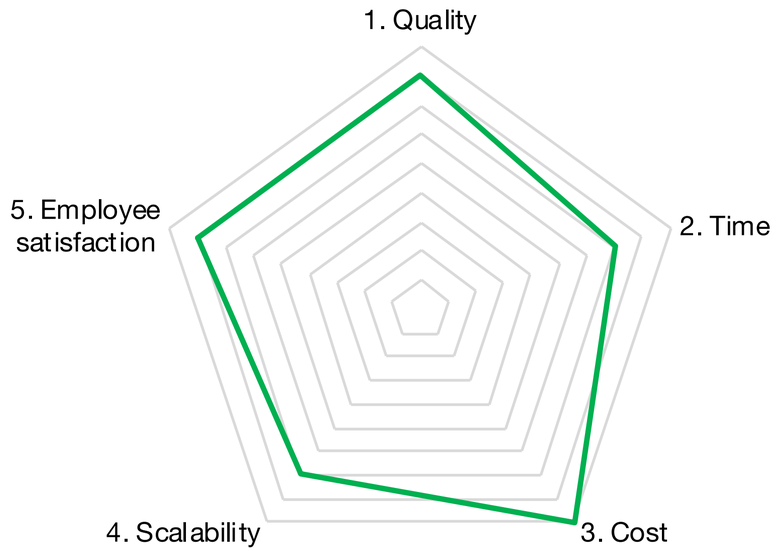
Five groups of KPIs will be continuously tracked to quickly and easily assess success over time at multiple levels



KPI groupings

1. **Quality:** Measures if the project is solving the problem for the user
2. **Time:** Speed to market
3. **Cost:** Amount of money and resources the project requires in order to deliver a product
4. **Scalability:** Ability to scale the project past an initial pilot phase
5. **Employee satisfaction:** Satisfaction of GSUSA employees as the project processes are underway

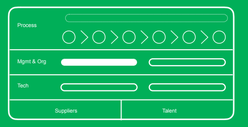
KPI dashboard



Holistic view

- The KPIs will map to the six steps in the Experience Development Process with specific metrics to measure success
- Metrics will be available to employees in multiple forms including in visual, easily-digestible formats (e.g., a spider chart)
- Metrics will be available on a project level, a product level, a strategic initiative level and a portfolio level

Each step in the process will require tracking against different performance metrics to ensure overall success

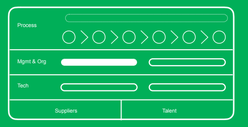


Funding & financial Roles & responsibilities Capacity management Technical governance **Metrics & measurement**

	Explore	Envision	Enable	Engineer	Execute	Evolve
KPI groupings	**Develop business case and project brief**	**Create the project vision**	**Develop solutions for the project (sprint 0)**	**Create production (sprint 1 through x)**	**Run the project**	**Analyze, maintain, optimize**
1. Quality	Reassess that the digital project ties back to strategic priorities; Number and type of users impacted	Usability testing goal; Results on prototype	Number of automated tests planned	Usability testing goal results on builds; UAT results; Security test results; Accessibility test results	User engagement; Number and type of support inquiries; Render speed; Uptime	User satisfaction survey; User adoption %; Uptime
2. Time	T-Shirt size of project durations	ROM of duration	Number of sprints; Average user story score	Sprint velocity	Days between releases	Reconcile estimated project duration; Project next iteration timing
3. Cost	T-Shirt size budget	ROM budget	Number of integrations; Cost per partner (software licensing, content)	Burn rate	ROI; Run-rate	Budget accuracy; Begin future projections
4. Scalability	N / A	N / A	Load test estimations	Load test results	Validate load test results	Validate and improve load test results
5. Employee satisfaction	Internal NPS					

Tying metrics to incentives

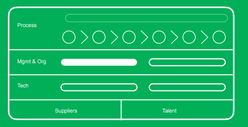
GSUSA can improve project execution in the new operating model by offering a number of intrinsic and extrinsic motivators



○ Funding & financial ○ Roles & responsibilities ○ Capacity management ○ Technical governance ● **Metrics & measurement**

	Type of motivator	Applicable via digital op model at GSUSA?	How to apply motivator in the new op model
INTRINSIC	Mastery	✓	Employ agile in select projects while adopting agile values more broadly, allowing employees to have a clear purpose, gain autonomy and develop expertise
	Autonomy	✓	
	Purpose	✓	
EXTRINSIC	Recognition	✓	Give awards for excellent delivery
	Pay	?	N / A
	Benefits	?	N / A
	Time	✓	Encourage employees to use the time saved from the new project processes for employee passion projects
	Promotions and career pathing	✓	Promote employees when they exceed expectations. At a minimum, provide employees with stretch roles designed deliberately to show future promotion path

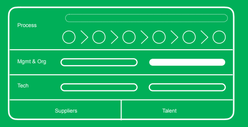
To begin tracking metrics at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



Funding & financial | Roles & responsibilities | Capacity management | Technical governance | **Metrics & measurement**

	Requirement	Next steps
1	Quality	Map the proposed projects back to the strategic priorities to understand if the work will solve user experiences. Identify the user segments and the number of users who will be impacted by the digital projects
2	Time	Estimate the amount of time a digital project will take by starting with a T-Shirt sizing for duration of the project. Look at the totality of the projects with timing estimates to calibrate timing, resources and prioritization
3	Cost	Estimate the cost of a digital project with a T-Shirt sizing budget for the project before starting formal budgets
4	Scalability	Plan and estimate load testing in accordance with enterprise expectations
5	Employees satisfaction	Review Gallup data to understand current state employee satisfaction across projects. Ensure that employee NPS can be recorded for employees working on digital projects
6	Controlled	Test new measurement approach with a small use case before scaling, preferably one project undergoing an agile pilot

The agile way of working is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



Plan

Process

Explore → Envision → Enable → Engineer → Execute → Evolve

Management & organization

Governance

Agile

Technology

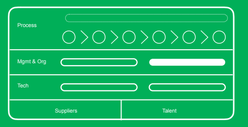
Service management & operations

Enterprise architecture

Suppliers

Talent

To be successful, the digital operating model must support a variety of requirements for the management and organization component



Management & organization

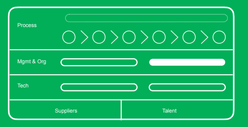
Governance

- **Capacity Management:** Plan and manage appropriate resource capacity with a portfolio view for strategic initiatives
- **Metrics:** Manage digital projects based on agreed upon business metrics and provide an incentive model with intrinsic and extrinsic motivators for employees
- **Roles & Responsibilities:** Ensure understanding of roles and responsibilities required to successfully manage and develop digital projects in the Experience Development Process
- **Funding & Financial:** Adopt a portfolio approach for funding and financial planning for strategic initiatives and subsequent digital projects
- **Technical Governance:** Manage digital projects and technology architecture from a portfolio view to be reusable, integrated, and measured

Agile

- Develop agile values, principles and practices that match with GSUSA's way of working for initial agile adoption
- Ensure executive support and education for agile adoption
- Identify a product / project group to implement guiding principles of the new way of working before scaling to other parts of the organization
- Design the team between IT and Communities and allocate specific people to roles in order to implement agile gradually
- Engage in continuous improvement and iterative way of working

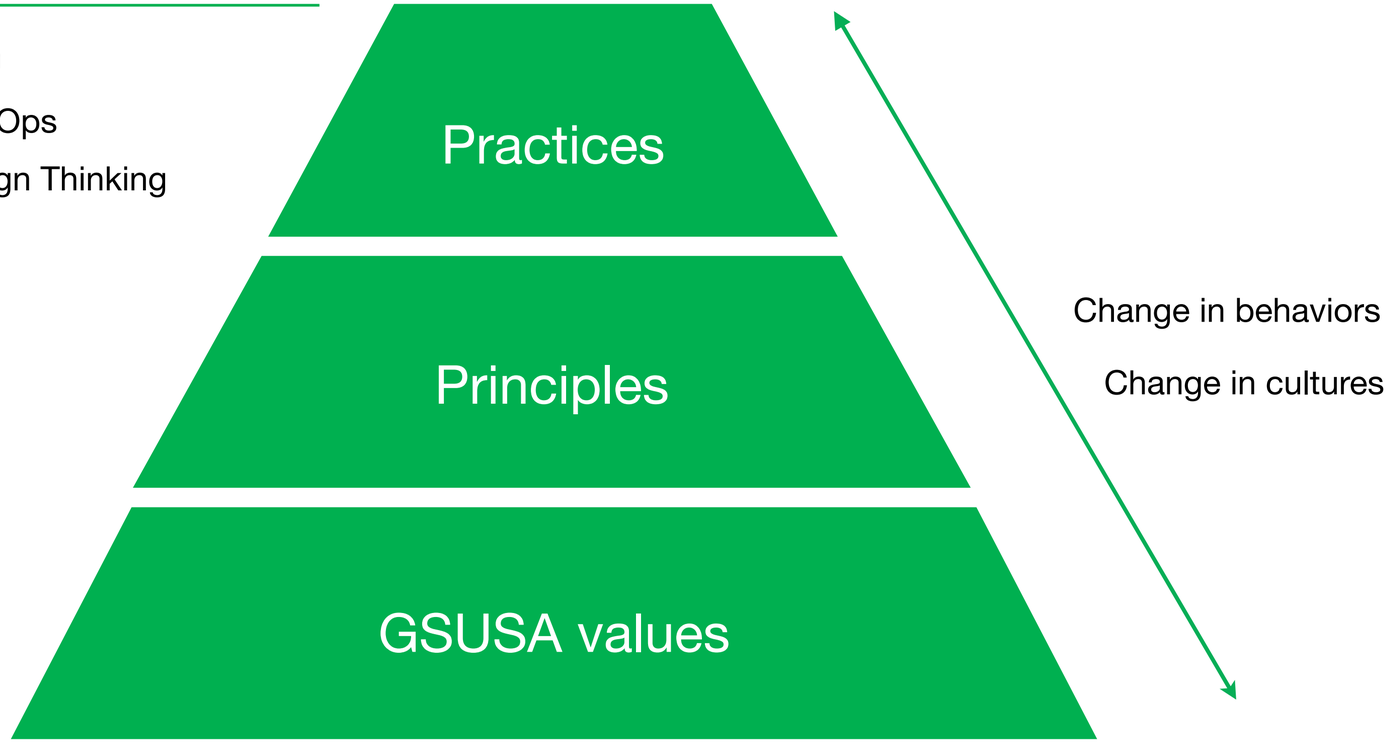
Using building blocks based on values, principles and practices, GSUSA can implement a scalable version of agile



Lean

Dev Ops

Design Thinking



Change in behaviors

Change in cultures

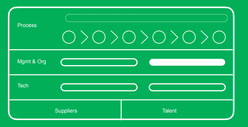
G. go-getter

I. innovator

R. risk-taker

L. leader

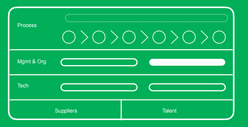
The principles and practices allow people at all levels of the organization to bring agile to life by changing their behaviors



	Clarity of outcome	Iteration over perfection	Self-directing teams
PRINCIPLES	Begin with clarity of outcome, and let it guide every step along the way	Listen, iterate, learn, and course correct rather than waiting until it's perfect	Encourage self-direction for teams to feel empowered, instead of concentrating leadership in the hands of a select few
PRACTICES	• Design Thinking practices • Backlog prioritization • Information radiators, kanbans, burndowns, etc. • Agile planning	• Showcases • Stand-ups • Continuous feedback • Retrospectives	• Self-organized teams • Empowered teams • Social contract • Team commitment (e.g., iteration planning)

Practices bring the values and principles to life!

Agile teams are a group of individuals with a clear purpose, working in a collaborative manner and dedicated to continuous improvement

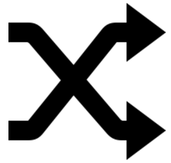


Team design principles

Small (5-9 Members)

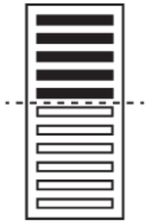
Dedicated

Co-located

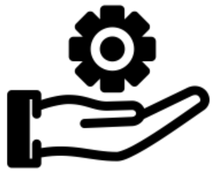


Cross-functional

Shared purpose

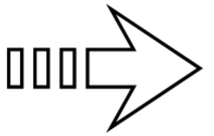


Prioritized and visual backlog



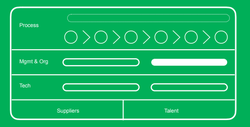
Freedom within the framework

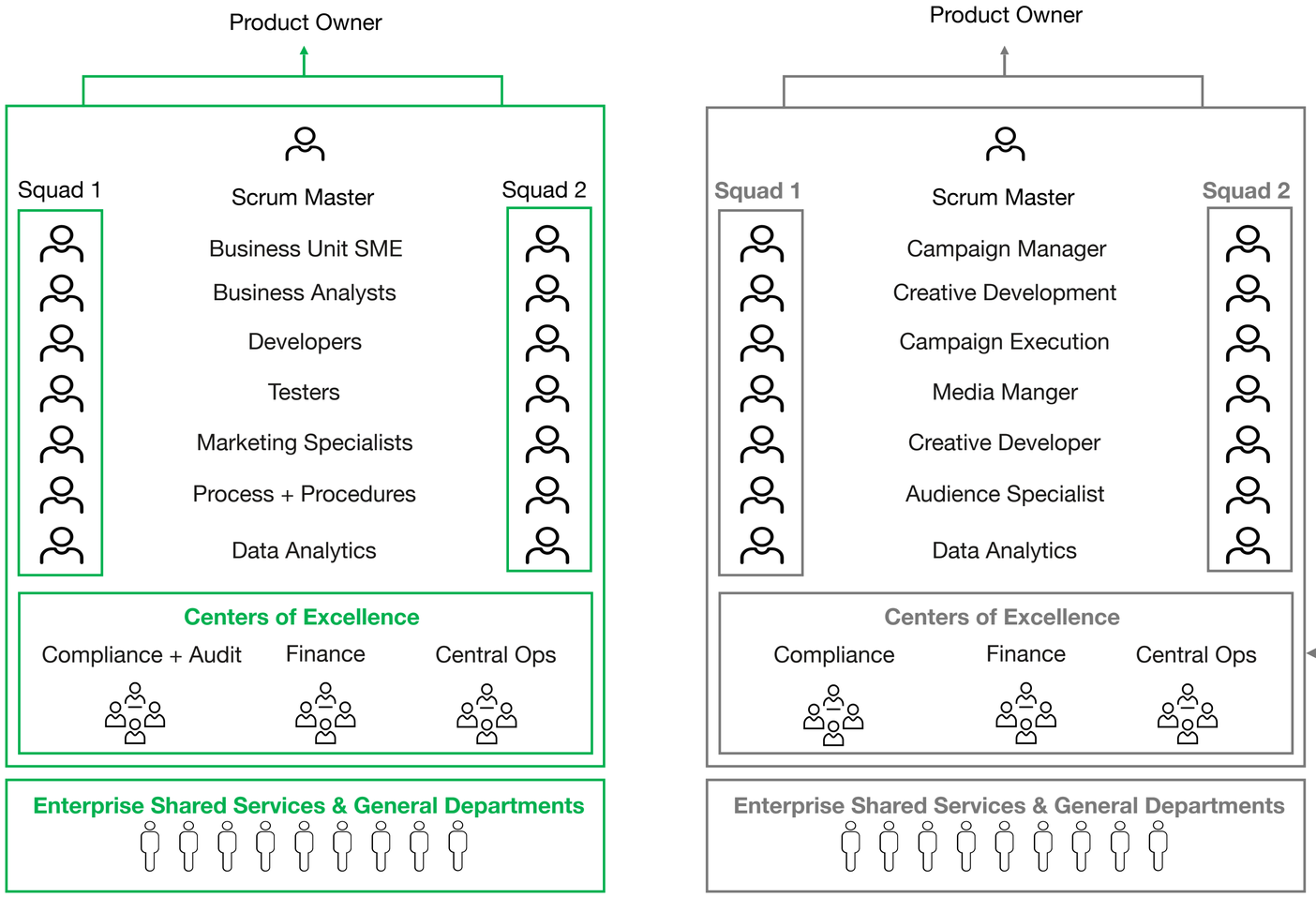
Adaptability and flexibility



Persistent

Teams are self-directing and cross-functional with the capabilities to deliver on their goals





Squad example B
(Types of work: marketing)

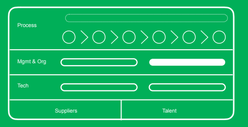
Analyzing the work teams do and the capabilities needed to do that work enables us to determine the make-up of the agile team

Benefits to measure:

- How quickly deliverables are produced
- Sense of employee engagement
- Learn before we scale

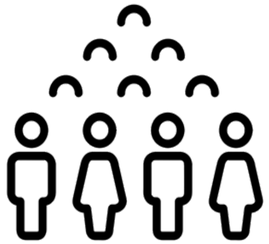
Future state

In the future, the adoption of agile at the enterprise level can be used to change behaviors and achieve new outcomes



Common principles

Evolving culture



Realized outcomes

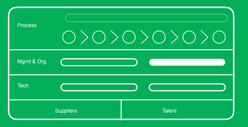
Customer & employee satisfaction

Realize business value

Efficiency

Adopting a set of common principles requires leadership alignment and change management to drive an effective shift in culture

Agile transformation is a journey, not a quick fix



Overall agile transformation approach

Phase 1: design & early adoption

Phase 1 focuses on laying a strong foundation for the multi-year transformation to true agility

During this time, a transformation team is created and curates which values and principles will guide it, and creates a high level operating and governance model

Phase 2: refine and ramp

Phase 2 iterates on the design of the model and begins work on learning and adjusting the model from feedback from pilots across the Enterprise

Pilots will be across the enterprise at all teams and across many layers of seniority

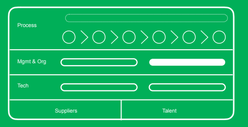
Phase 3: scale

The main focus of Phase 3 is scaling the model across the Enterprise

This phase will have large scale change management work, along with extended coaching for new teams as well as leadership at all levels

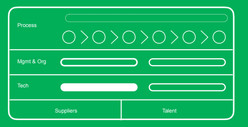
Months 1- 4 | **Months 4 - 12** | **Months 12 - 24**

To begin agile at GSUSA successfully, the IBM team has outlined initial perspectives on a few requirements



	Requirement	Next steps
1	Educate selected leadership for change management	Conduct outreach to a select group of members in the C-Suite to conduct discovery and education workshops to teach and align on what agile means, understand why agile should be implemented, and develop a buy-in plan
2	Gain buy-in at the leadership level	Gather buy-in from selected members of the executive team. This requires advocating for a small, co-located, dedicated, cross-functional team to begin the new way of working
3	Clearly define the principles behind agile	Apply the agile principles to the demand management system to prioritize projects, identify resources required to complete the work
4	Design your team	Develop high level design principles to decide how IT and the business will work together and understand how the team will be measured in the new way of working
5	Determine initial focus area, and scale later	Identify one upcoming digital project to implement guiding principles of the new ways of working. Test with a small use case to begin laying the groundwork to scale later
6	Get specific about your team	Assign specific people in the organization to roles in order to roll out the agile early adoption project
7	Identify capacity management	Apply capacity management principles to leverage existing resources and skills for the early adoption project
8	Iterate and learn	Test with a small use case (e.g., one project) while laying the groundwork to scale as needed. Record what works and what should be iterated on to improve the new agile operating model

Service management and operations within technology is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



Process

Plan

Explore > Envision > Enable > Engineer > Execute > Evolve

Management & organization

Governance

Agile

Technology

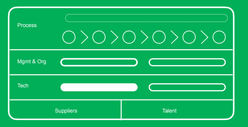
Service management & operations

Enterprise architecture

Suppliers

Talent

To be successful, the digital operating model must support a variety of requirements for the technology component



Technology

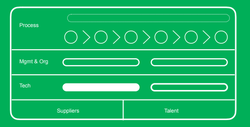
Service management & operations

- Standardize the processes, workflows, OLAs and requirements for running and supporting all enterprise products across
- Develop clear ownership of ITSM activities and defined roles, supported by enterprise monitoring and reporting
- Leverage a centralized tooling platform for increased scalability and efficiency
- Integrate process and workflows across teams and suppliers for seamless interaction

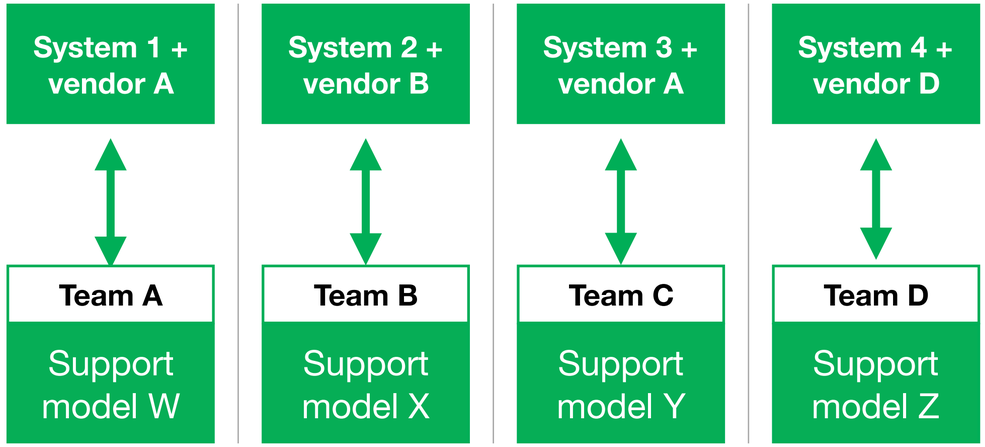
Enterprise architecture

- Accelerate foundational architecture that provides common components for enterprise needs
  - E.g., Identity management, API management, Data management
- Continue evolving cross-organizational stewardship data by aligning various data sources and deploy data management platform

The future scale of digital products will require an enhanced IT service management & operations capability

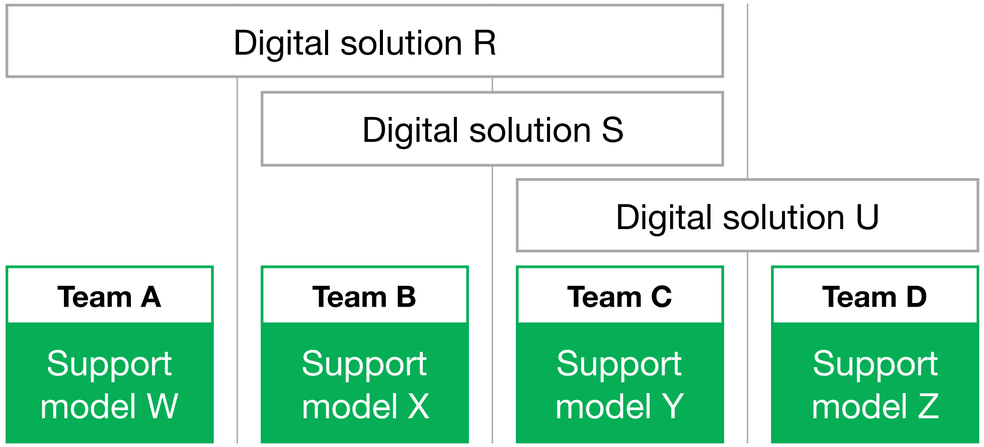


Today’s service management & operations structure…



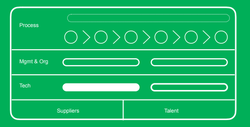
- Mostly self-contained solutions
- Can operate within unique IT service delivery models
- Ad-hoc cross system support

…will be problematic in tomorrow’s complex environment

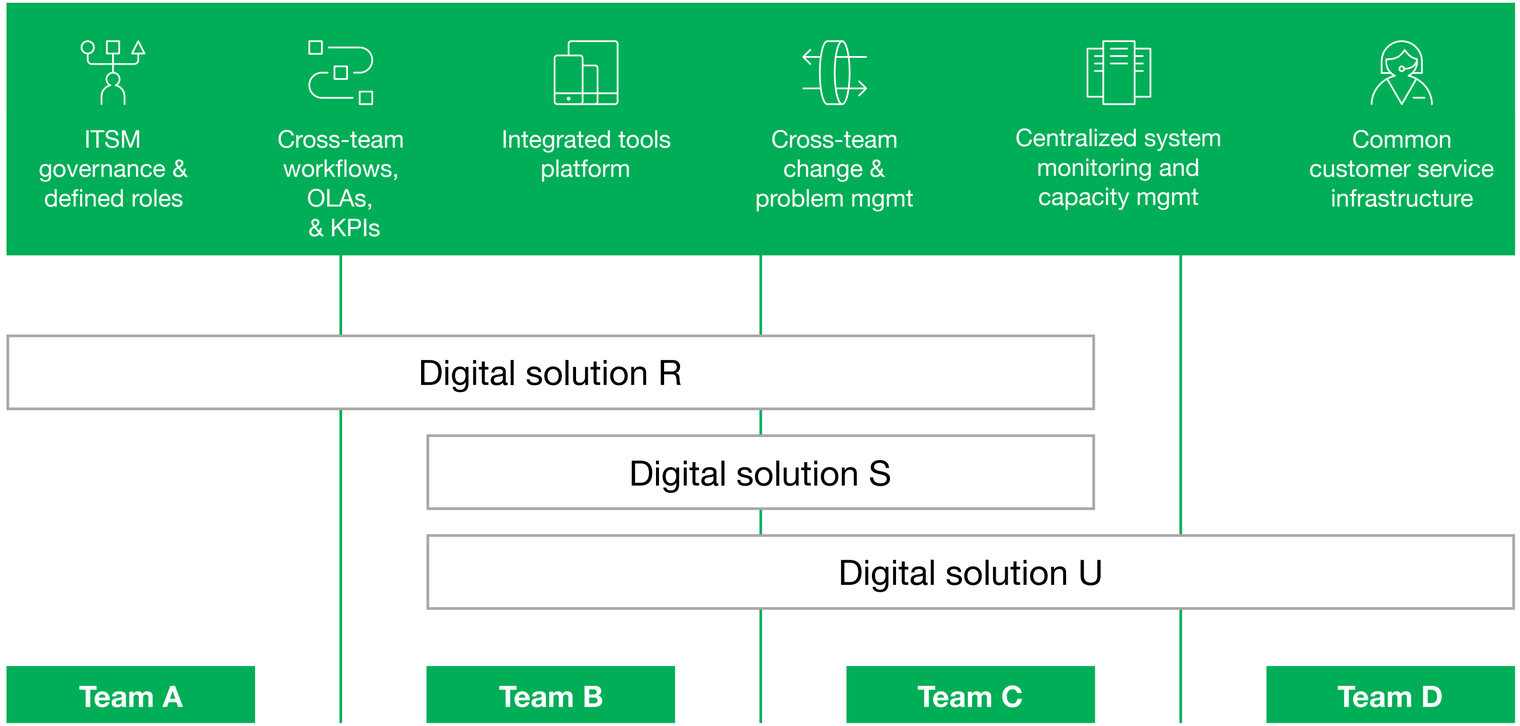


- Several digital solutions spanning multiple platforms and teams
- Increased user expectations for service levels
- Scalability of ad-hoc coordination across systems and teams is limited
- End-to-end visibility will be a challenge

The future scale of digital products will require an enhanced IT service management & operations capability



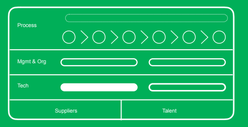
Enterprise IT service management & operations framework 2.0



Benefits of the framework

- Consistent service experience for customers
- Operational / cost efficiency through common workflows
- Reduced “churn” in cross-team interactions through clear role definitions
- Real-time management visibility of service operations
- Scalable structure for future growth

To create the integrated service management & operations framework, GSUSA must keep a few principles in mind



1 Standardized

- Evolve common processes, workflows and policies that are used by all teams and suppliers
- Reevaluate standard roles and responsibilities for IT service management & operations
- Create consistent operational performance reporting for end to end visibility into service delivery operations

2 Managed

- Establish a standard service catalog with clear targets for IT operations
- Re-examine accountable owners and defined roles for each service delivery process
- Continuously monitor and measure IT service operation processes for on-going performance improvement

3 Integrated

- Design seamless interactions between processes
- Establish clear procedures for engagement and information exchange between teams

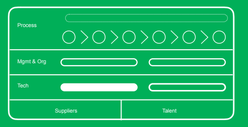
4 Automated

- Establish a common tool platform to drive standardization and scalability of workflows and policies
- Consolidate information in the platform to provide visibility from a “single source of truth” for IT service operations

5 Evolutionary

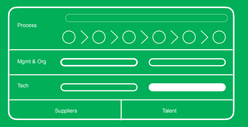
- Evolve strategy for IT service management
- Incrementally build and deploy ITSM capabilities
- Focus on continuous improvement of operations

To begin implementing an integrated service management & operations at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



	Requirement	Next steps
1	Standardized	Define the operational requirements for customer service, problem, and incident management functions across all digital products
2	Managed	Evaluate the services that the business from IT to successfully support digital products in the future
3	Integrated	Define the requirements for customer service, problem, incident, and change management process interaction and information exchange across projects and between GSUSA and suppliers
4	Automated	Evaluate the capabilities of existing tooling to meet operational requirements for customer service, problem, and incident management functions across all digital products
5	Evolutionary	Define the MVP for the customer service, problem, and incident management functions of service management & operations

Enterprise architecture within technology is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



Process

Plan

Explore › Envision › Enable › Engineer › Execute › Evolve

Management & organization

Governance

Agile

Technology

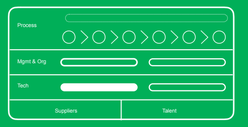
Service management & operations

Enterprise architecture

Suppliers

Talent

To be successful, the digital operating model must support a variety of requirements for the technology component



Technology

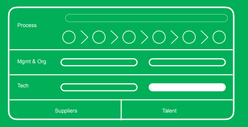
Service management & operations

- Standardize the processes, workflows, OLAs and requirements for running and supporting all enterprise products across
- Develop clear ownership of ITSM activities and defined roles, supported by enterprise monitoring and reporting
- Leverage a centralized tooling platform for increased scalability and efficiency
- Integrate process and workflows across teams and suppliers for seamless interaction

Enterprise architecture

- Accelerate foundational architecture that provides common components for enterprise needs
  - E.g., Identity management, API management, Data management
- Continue evolving cross-organizational stewardship data by aligning various data sources and deploy data management platform

To create the integrated enterprise architecture framework, GSUSA must keep a few principles in mind



1

Fit-for-purpose

- Partner with best-of breed / fit-for-purpose
- Buy when possible instead of building
- Use vendor supported packaged systems to form the foundation of GSUSA core applications portfolio
- Leverage solutions natively designed to address specific use-cases

2

Minimized customization

- Maximize configurations leveraging platform native capabilities
- Limit customizations to occur on relevant platform maximizing re-use of solution framework

3

Customer focused

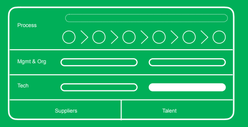
- Establish consistent experience for constituents across all digital channel touch points
- Maintain single identity for constituents and seamless experience

4

API led

- Provide services that are technology agnostic and can be consumed by any application
- Ensure each API is business led and service oriented, regardless of the platform(s) from which it is provided

GSUSA should approach enterprise architecture through an API led process, and consider specific objectives and activities to achieve success



Objectives

- Create business agility to drive rapid business reconfiguration (e.g., to revamp customer experience, address regulatory challenges)
- Provide ease of use for APIs
- Track and manage APIs in use
- Build a framework for enforcing agreements on API use and security access control

Activities

- Define API orchestration
- Source API services
- Measure and monitor performance

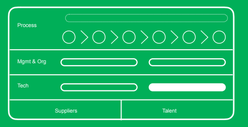
Benefits

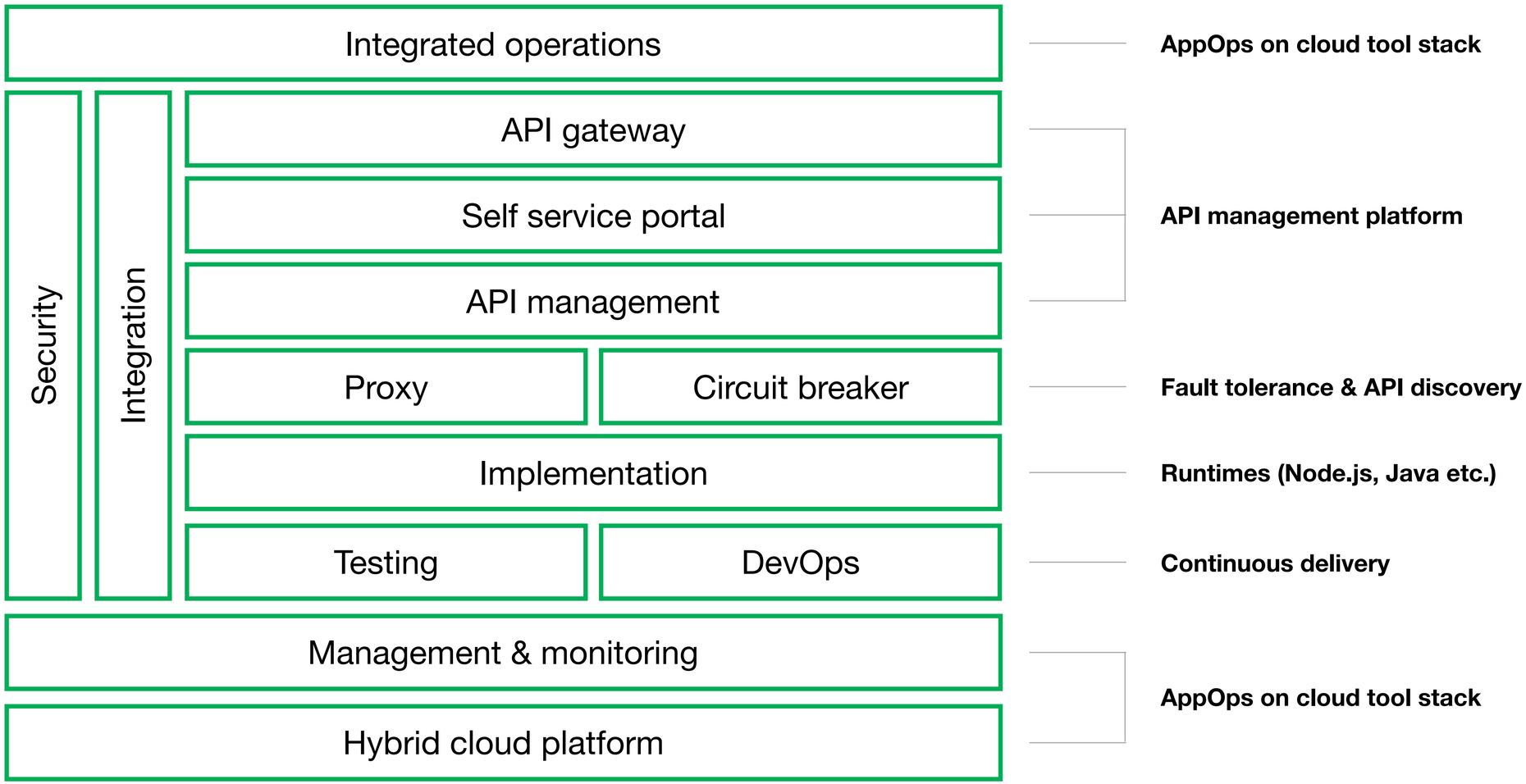
- Improved analytics and reporting on API usage across the enterprise
- Increased maturity and governance of services through API management
- Enable future products and services

Additional considerations

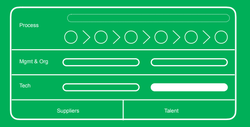
- The enterprise will have to become an API provider to service digital needs
- An API gateway and supporting API services to satisfy diverse business scenarios
- Create API services based on enterprise business need to maximize scalability and utility

Consider each piece in a best-in-class technology reference architecture when planning a new project - some may use existing EA services while others may need new or unique instances





Consider a best-in-class microservice reference architecture toolset when solutioning API service enablement to minimize risk and maximize scalability



GitHub or local file system configuration

Registry dashboard

Health monitoring dashboard

Config server

Service discovery

Auth service

Circuit breaker

Monitoring service

Web application

Mobile apps

API clients

Web BFF

Mobile BFF

API management

Reverse proxy security load balancing routing

Service Proxy

Proxy, A/B testing

Application Microservices

Client load balancing

Microservice 1 (rest controller)

Client load balancing

Microservice 2 (rest controller)

Application Batch

Batch process

Enterprise systems

Asynchronous integration / messaging layer

System A

System B

System C

Synchronous integration (API gateway, web service)

System X

System Y

System Z

Legend

Application microservices (APIs, web, batch)

Toolset

Dashboards

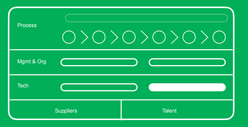
Tracing service

Logging service

Tracing dashboard

Log dashboard

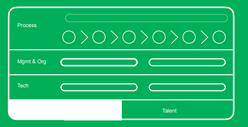
To begin implementing enterprise architecture at GSUSA successfully, the IBM team has outlined immediate next steps on a few requirements



	Requirement	Next steps
1	Fit for purpose	Size API service toolset building blocks for API gateway implementation
2	Minimized customization	Consider only common, existing best-in-class API service applications in sizing
3	Customer focused	Prioritize the backlog of service architecture items based on their impact to members
4	API led	Model APIs based on the business domain before implementation to inform final architecture

Operating model

The supplier component is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



Process

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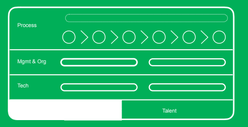
Talent

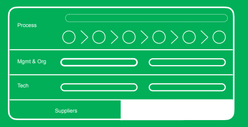
To be successful, the digital operating model must support a variety of requirements for the supplier component



Supplier

- Acknowledge that GSUSA's digital operating model relies heavily on supplier relationships
- Develop and document a strategic vision for supplier management that includes the desired organization, capabilities and scope of supplier management activities
- Categorize suppliers to ensure the right contracts, metrics and relationships are considered
- Establish a supplier management function within GSUSA to enable proactive management and ensure supplier accountability
- Enable a contract management process for contract creation, negotiation, execution and analysis

Talent is a part of the digital operating model framework and is important to consider to successfully deliver digital projects



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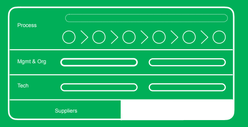


Talent

- Understand the existing skills and roles in the organization and identify key gaps between the current talent and the required talent fo achieve desired success
- Develop a talent management strategy to address talent gaps that aligns with the organization strategic plans
- Ensure standards for effective and efficient hiring, termination and promotion decisions
- Encourage talent development through training and other avenues to increase performance for individuals and teams in current roles and improve readiness for promotion
- Standardize performance measurement across the organization for roles categorized in similar job families and ensure performance measure occurs at least twice per year
- Enable the talent management organization to track activities using KPIs including hiring timeline, employee satisfaction and performance

Transformation Timeline

Enable the next chapter of transformation, pilot the Experience Development Process and size new work

To enable the next chapter of transformation while mitigating risk, GSUSA must pilot the Experience Development Process while sizing new work to establish the next version of service management & operations, standardize quality standards, establish centralized software development tooling and plan foundational architecture efforts that are enterprise, not community specific

Operating model pilot

Pilot implements the new operating model to substantiate a best-in-class approach to project delivery. Through a pilot, engage and prepare teams to adopt a new way of working, gain input, assess the impact of change and plan how the change will be managed iteratively, and monitor adoption of the change to ensure desired outcomes with real-time data

Experience Development Process & tooling

The Experience Development Process & Tooling is a part of the digital operating model framework and provides centralized tooling for software delivery to establish visibility, efficiency, and story management, packaging, code versioning, testing, documentation and deployment

IT service management & operations

A centralized platform for increased scalability and efficiency for enterprise monitoring and reporting of ITSM operations that integrates process and workflows across teams and suppliers

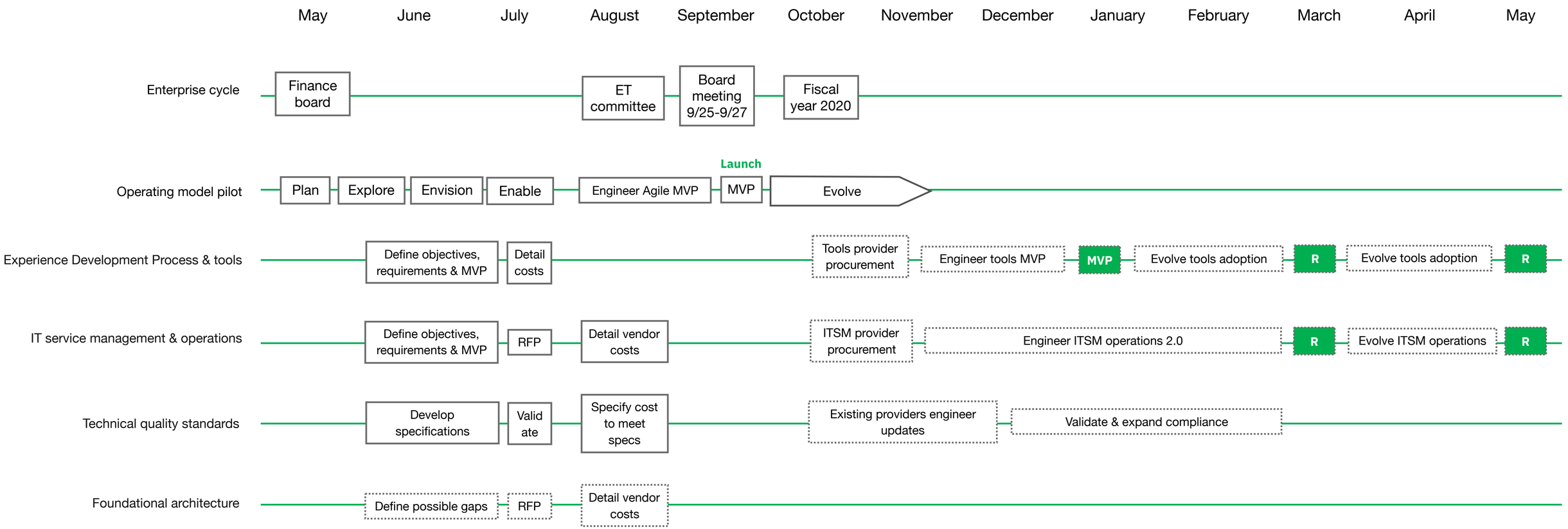
Technical quality standards

The standardization of non-functional requirements that establish technical system quality for items including reliability and scalability

Foundational architecture

Common components for enterprise needs, for example identity management, API management and data management

Over the next 12 months, GSUSA should engage in a number of activities to enable the digital transformation



Key:

------ Dotted line is directional pending sizing

R R or green box means release

Potential pilot candidates

The IBM team assessed multiple projects from across GSUSA to determine the best fit for an operating model pilot

Digital Cookie	Digital Credentials	GoGold	Mobile app	Unified Commerce	VOLP	VS 2.0	VTK Parity+
Cookie ordering platform enabling Girl Scouts cookie sales, ordering and tracking	Earn digital badges towards education credit	Gold Award tracking / reporting app	Engage and connect the Girl Scouts community to earn badges and go on educational journeys	Migrating all the e-commerce stores into a single platform	Online learning platform providing Girl Scouts educational content for volunteer troop leaders	Enhanced integrated Volunteer Systems platform to support customer engagement initiatives: marketing, relationship management, e-commerce, financials and reporting	Enhanced VTK with new features including a portal to customer facing enterprise products

The IBM team used several factors in determining the best operating model pilot

Criteria to determine pilot

- High priority area for GSUSA SteerCo based on visibility and business imperatives
- Right balance of risk / reward for the initial phase
- Supported by clear business objectives that create the platform for change
- Strong relationships between business and IT
- Understanding of agile concepts supported by leadership
- Change agent willing to challenge the status quo with key people in the organization
- Should include customer experience strategy and design effort
- Should incorporate data management strategy and system to provide actionable data to support business decisions
- Involves enterprise-wide foundational architecture elements
- Supported by the Experience Development Process and tooling
- Should support a cross-functional team
- Should not overlap or have dependencies on waterfall processes, or on projects currently in flight
- Should not be a one off. Should have multiple iterations to design, build, test, measure and iterate

The correct cross-functional team(s) will be crucial to the success of the pilot and will be confirmed later on

Team

Agile coach

Agile exec sponsor

Application architect

Back-end developer

Business analyst

Content manger

Copywriter

Enterprise architect

Experience strategist

Front-end developer

Project manager

Integration manager

Product owner

QA tester

UX / UI designer