

Managing **SAP Projects 2006**

ORLANDO ■ OCT 16-18

Case Study: How Innovapost Manages Overlapping Projects and Reduces Inefficiency With Its Managed Release Program

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Innovapost

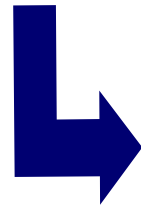
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Why This Session?

- Do you operate in an environment where:
 - ♦ You regularly implement multiple initiatives simultaneously?
 - ♦ You have a number of one-off deployments?
 - ♦ Some of your deployments require notification to your external client base?
 - ♦ You have limited skilled resources available?
 - ♦ Your operating environment is relatively complex?

If you answered Yes to any of the above,



a Managed Release (MR) Program
may be the solution for you.

In This Session ...

- We will discuss the Innovapost model:
 - ✓ Organizational MR model
 - ✓ Business processes, both IT and Client
 - ✓ Templates
 - ✓ Rigor
 - ✓ Challenged areas
 - ✓ Our future plans

- Your takeaway:

How to implement an MR in your environment

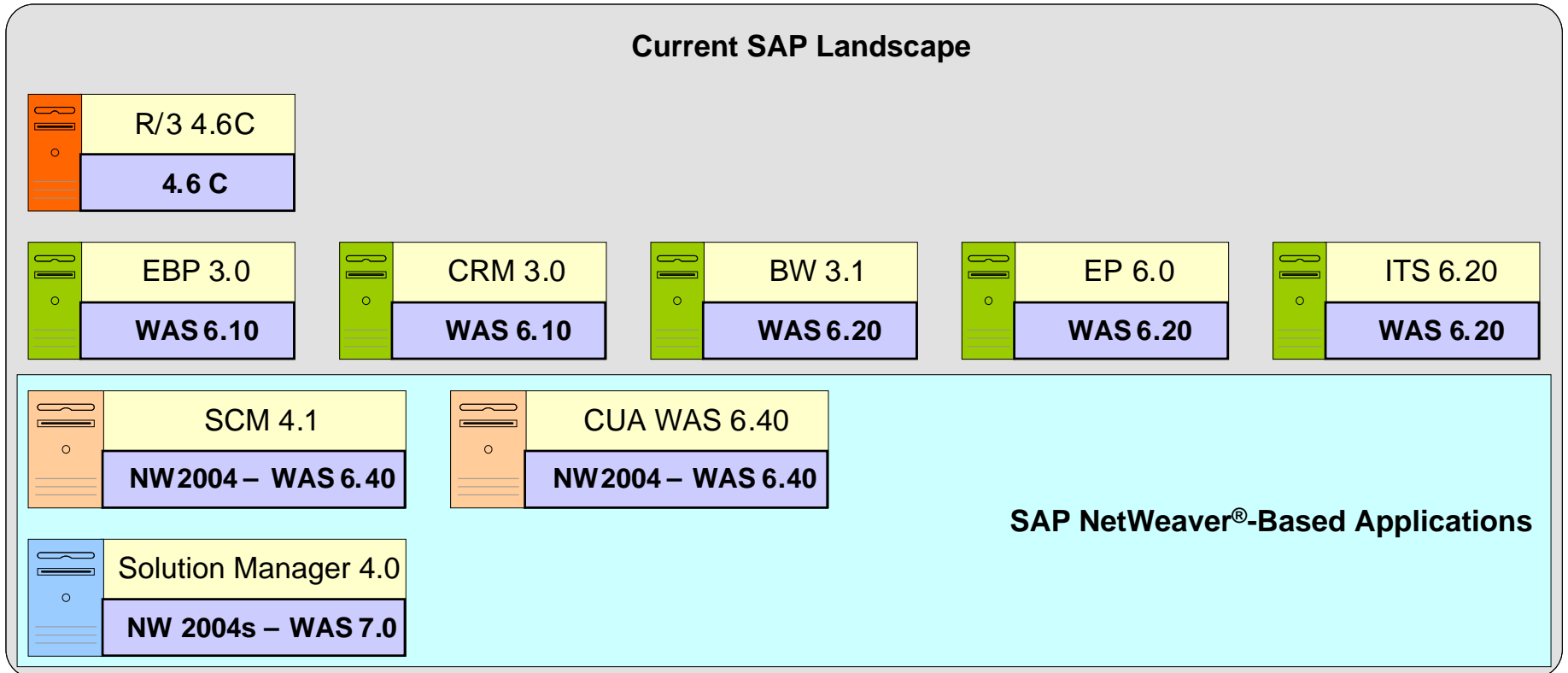
What We'll Cover ...

- Who are we, and what is our business landscape?
- Why did we consider a Managed Release (MR) Program?
- What does our MR Program look like?
- What are the key processes and templates required?
- How did we manage a significant SAP upgrade within the MR program?
- What lessons did we learn along the way?
- Wrap-up

Who Is Innovapost?

- **Founded in 2002 as the IT supplier for Canada Post Group of Companies**
 - ♦ Over 600 employees, plus large contractor pool
- **Earned SAP's Customer Competence Center certification**
- **Systems are accountable for ensuring delivery of:**
 - ♦ 11 billion pieces of mail annually
 - ♦ Mail to 31 million Canadians and 1 million businesses and institutions
 - ♦ Service via 20,000 delivery routes in Canada
- **Our systems support:**
 - ♦ 60,000 Canada Post employees
 - ▶ 10,000 full-time users
 - ▶ 2,000 retail users
 - ▶ 50,000 employee self-service users

Current Systems Landscape



Peripheral critical systems

- ✓ Electronic Shipping Tool
- ✓ Online Business Center
- ✓ Retail Order Support System
- ✓ Ship-In-A-Click
- ✓ Electronic Change of Address
- ✓ eLink
- ✓ Delivery Information Application
- ✓ Letter Carrier Route Management System
- ✓ Rural and Suburban Route Management System
- ✓ Third-Party Shipping Systems
- ✓ International Mail System
- ✓ Money Order Verification

Current Operational Landscape

- **Application Management (AM) and Application Development (AD)**
 - ♦ AM = maintain production and do smaller enhancements
 - ♦ AD = design, develop, and deliver initiatives that cross multiple systems, greater than approximately 100K
- **Technical Services Support and Solutions Architects**
 - ♦ Provide technical services to both AM/AD
 - ♦ Ensure the architectural vision is adhered to
 - ♦ Ensure the Canada Post investment in SAP is not diluted unnecessarily
- **Separate Tier 1 organization (CGI)**
 - ♦ Responsible for data centers, hardware, phone service, etc.

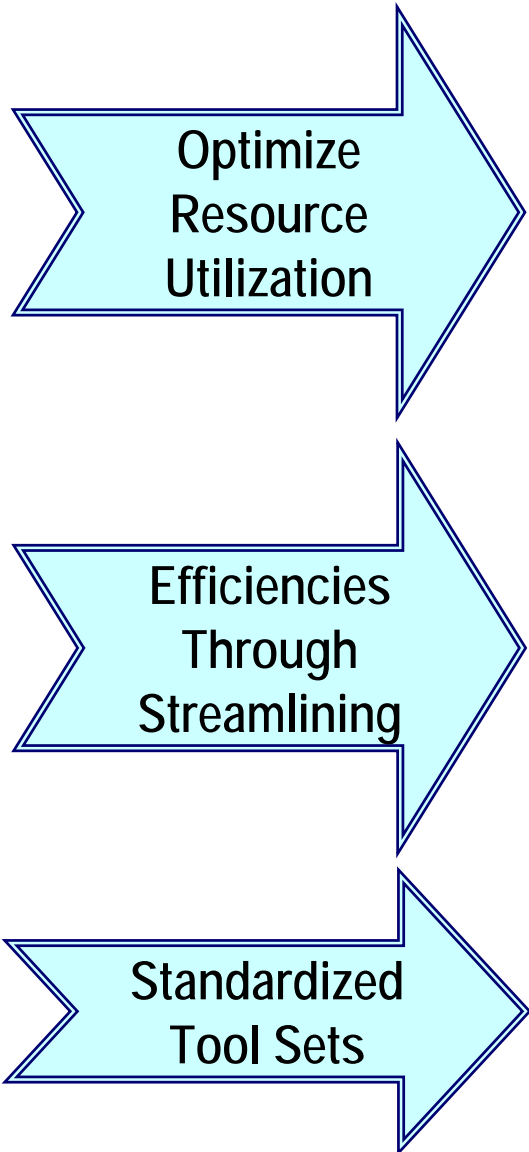
Current Annual Work Program

- In an average year, we:
 - ♦ Deploy approximately 160 initiatives to production
 - ♦ Deploy ongoing Application Management System Incident Reports to production
 - ♦ Perform ongoing technology upgrades, both hardware and software
 - ♦ Implement Tier 1 services infrastructure desktop image refreshes
 - ♦ Deploy an annual rate program that is our client's most significant form of revenue generation

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Our Business Opportunity



Optimize
Resource
Utilization

Efficiencies
Through
Streamlining

Standardized
Tool Sets

- Client side
 - ♦ Take to Market — customer-facing
 - ♦ Take to Company — employee-facing
- Within Innovapost
- System: More effective environment and infrastructure management

- De-stress client customer-facing systems
- Financial gains with “one touch” work efforts
- Amalgamating work efforts organizationally

- SPOC: Corporate management and reporting
- Formal and standardized templates and processes
- Formal planning and information sharing between companies

January 2004: A Critical Decision Point



- Many initiatives
- Many clients
- Competing agendas
- AM boundaries were set based on Service Level Agreements and Support Contracts
- AD work equates to the new revenue
- Current infrastructure was not static
- Limited SAP IT skilled resources both internally and externally
- Canada Post external clients unhappy with the volume of communications



Solution

The MR was born!

January 2004: Decision Point Impact

Do you know how difficult it is to herd cats?

Creating an MR is probably a bit like that!



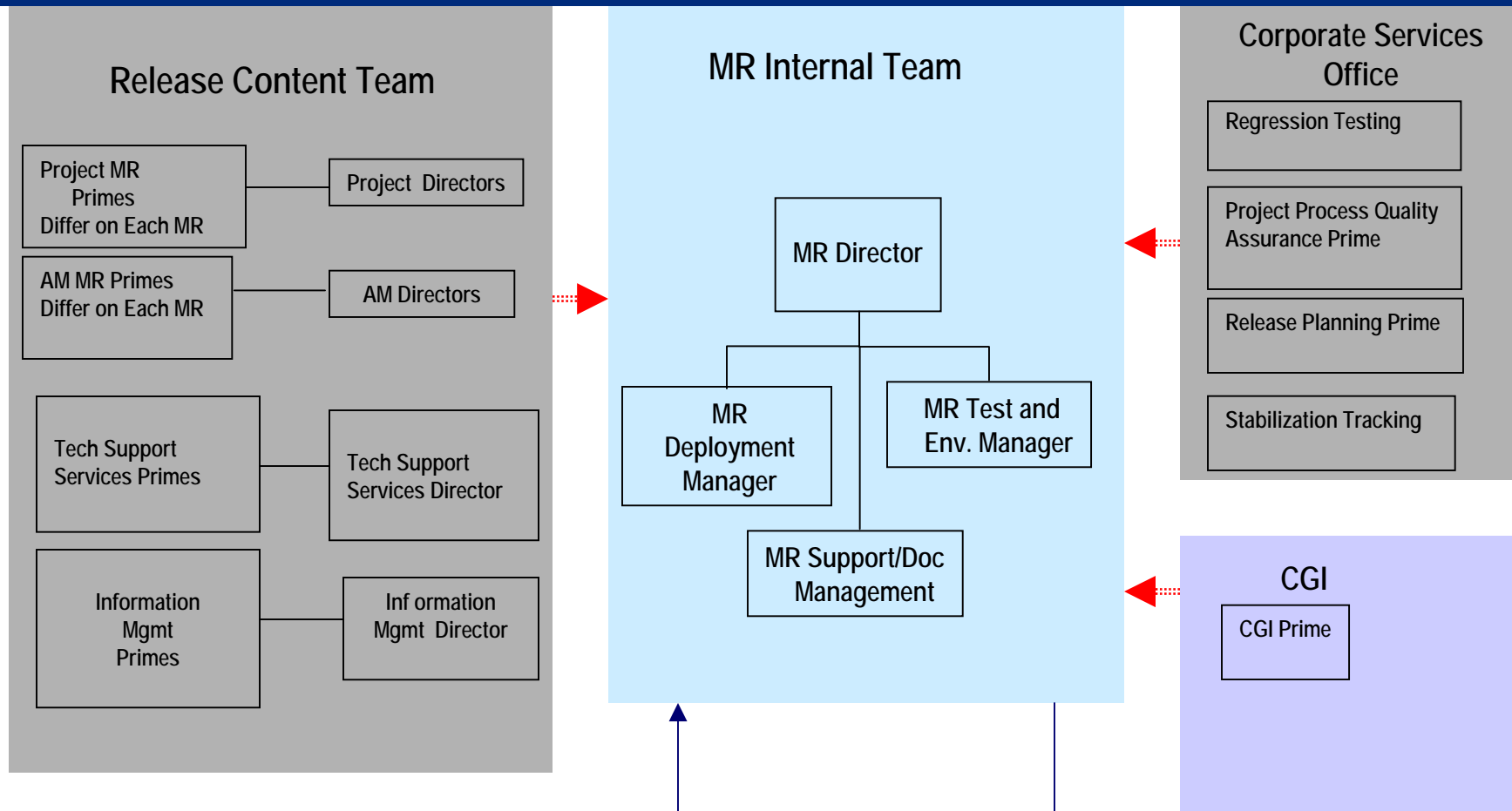
Heads Up!

Initially!

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Innovapost MR Team Structure






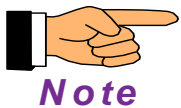
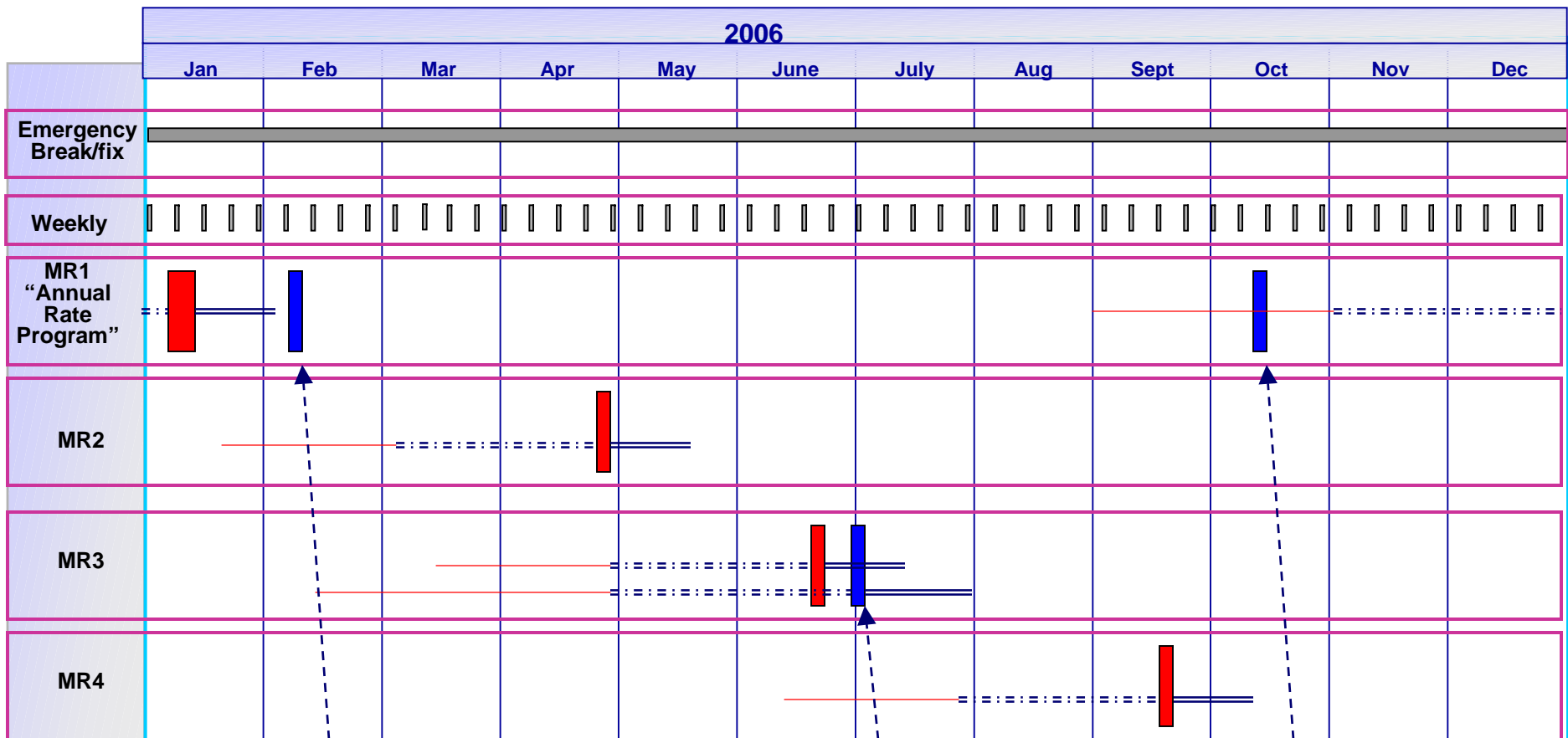
Service Level Agreement with Canada Post, equivalent to two full-time resources

Client MR Interface
Canada Post Core Team
and Steering Committee

A Typical Annual MR Cycle

- The actual 2006 MR program

Product test = 
 UAT and Regression = 
 Stabilization = 

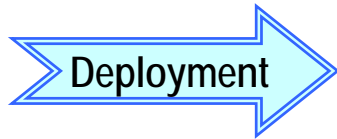


Staging Refresh

SCM Upgrade

Staging Refresh

Overall Implementation Metrics 2006



Initiatives deployed

MR1 (January 8 and 15)	28
MR2 (April 30)	27
MR3 and SCM upgrade (June 25 and July 1)	27
MR4 (Sept 17)	34

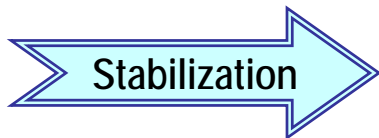
} **116**

Transports over the MR weekends

MR1	150
MR2	286
MR3 and SCM upgrade	547
MR4 (projected)	300

Lines (tasks) in Deployment Plan

MR1	465
MR2	897
MR3 and SCM upgrade	956
MR4 (projected)	600

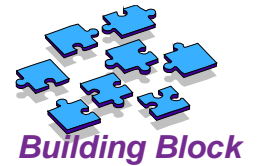


Zero Critical or High System Incident Reports for *all* MRs in 2006



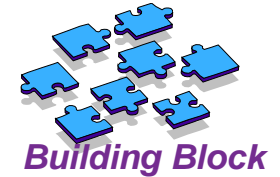
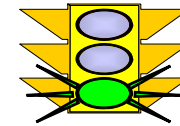
MR Operational Structure: Building to a Release

- ❑ Formal kick-off at least three months prior to each release
- ❑ Out of Release initiatives assessed for impacts
- ❑ Development/staging environment managed from kick-off
- ❑ Formal Risk Management assessment
- ❑ Cross-Initiative Integration Test needs assessment
- ❑ Performance Test needs assessment
- ❑ Project Process Quality Assessment process tracked
- ❑ Single User Acceptance Test Plan
- ❑ Single Regression Test Plan
- ❑ Single Deployment Plan
- ❑ Systems outage notifications
- ❑ Go/No-Go work sessions to evaluate risk



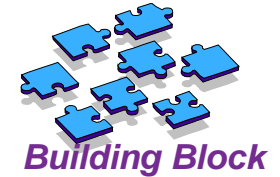
MR Operational Structure: Managing the Release Weekend

- ❑ Final Go/No-Go meeting kicks off the release
 - ❑ Mandatory attendance
 - ❑ Project Process Quality Assessment gaps reviewed
- ❑ Deployment Plan followed and updated in flight
- ❑ Scheduled checkpoints for all deployment primes and tech support
- ❑ Escalation process formalized
- ❑ Contingency plans in place
- ❑ Regular communication to all “interested parties”
- ❑ Client community performs landing tests
- ❑ Client Steering Committee meets to formally close out the deployment



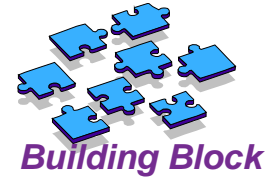
MR Operational Structure: Post-Deployment for a Release

- ❑ Daily status call for all initiatives to track production
- ❑ Client help desk stats monitored to determine any MR-related issues
- ❑ All System Incident Reports logged for three weeks
- ❑ Weekly reporting to executive team on stabilization
- ❑ Formal communications
- ❑ Lessons Learned work session
- ❑ Regression Test scripts updated
- ❑ Formal close out of the release with input to corporate reporting
 - ❑ Initiatives deployed successfully
 - ❑ Critical and High System Incident Reports



MR Operational Structure: Ongoing Associated Activities

- ❑ Project Process Quality Assurance monitoring and reporting
- ❑ Corporate guidelines for projects requesting to implement outside an MR
 - ❑ Weekly monitoring and reporting
- ❑ Orientation Package for all project leads when they join the MR cycle
- ❑ Innovapost intranet Web site for MR information
- ❑ Continuous improvement exercises



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MR: Processes and Templates

- Deploying many initiatives requires consistency between the teams
- Use of standard processes and templates (tools) generates consistency and a common “working language”
- Ownership varies based on the specific tool:
 - ♦ MR Deployment Manager
 - ♦ MR Test/Environment Manager
 - ♦ Initiative Lead

Critical Templates: Project Deliverables Template

- An overall template was used to assess progress towards readiness for the MR release. It included tracking all critical deliverables for each initiative in the release.
- **Owner: MR Deployment Manager**
 - ♦ Accountable for monitoring, tracking, and escalating concerns regarding missed deliverables and increasing risk to the MR



Checklist
Template

Critical Templates: Project Deliverables Template (cont.)

	Deliverable	Project Overview	Systems Impacted	Project Interdependencies	Test Platforms	Test Plan	Test Timeline	Volumetric Questionnaire
	Template Provided	No	Yes	Yes	Yes	No	Yes	Yes
	Date Due	July 12, 2006	July 12, 2006	July 12, 2006	July 12, 2006	July 12, 2006	July 12, 2006	July 12, 2006
Project / Initiative								
AMS Release	Eric 555-3524	13-Jul-06	13-Jul-06	13-Jul-06	13-Jul-06	13-Jul-06	13-Jul-06	13-Jul-06
Mail Operations Fall Release	John 555-5500	27-Jul-06	27-Jul-06	27-Jul-06	27-Jul-06	27-Jul-06	27-Jul-06	27-Jul-06
Xpresspost Certified - Commpost *	Skip 555-6246	14-Jul-06	19-Jul-06	19-Jul-06	19-Jul-06	26-Jul-06	26-Jul-06	19-Jul-06
PDSL Release 1.9	Marc 555-6137	14-Jul-06	25-Jul-06	25-Jul-06	25-Jul-06	25-Jul-06	25-Jul-06	25-Jul-06
Sourcing Management Bundled SIRS	John 555-6443	7-Jul-06	7-Jul-06	7-Jul-06	7-Jul-06	12-Jul-06	12-Jul-06	7-Jul-06
UPU Reengineering the International Postal Stream *	Andy 555-3344	27-Jun-06	27-Jun-06	27-Jun-06	27-Jun-06	28-Jun-06	27-Jun-06	28-Jun-06

Critical Templates: Systems Impacted

- A template was used to identify which systems are impacted by each initiative in the release
- The tool was used:
 - ♦ As input to determine integration test needs
 - ♦ To ensure all deployment primes are aware of other initiatives that could impact theirs
- Owner: MR Deployment Manager

Critical Templates: Systems Impacted (cont.)

2006 System Impacts

Project	R/3 4.6C												ePortal R/3 4.7			WPL	CRM	eBP			EM		
	R/3-HR	R/3-FI	R/3-CO	R/3-SD	R/3-MM	R/3-QM	R/3-ESS	R/3-EH&S	R/3-D&B	R/3-AuthSec	ePortal - Workflow	ePortal - ISA Server	ePortal - DB	ePortal - Content Mgmt	CUA - Roles	CUA	CRM	CRM Catalog	eBP	eBP Catalog	eBP Workflow	EM	EM
Sourcing Management Bundled SIRS			X	X					X									X	X	X			
ROSS: ZCASHINTIL	X	X	X																				
Partial Mailings Verification			X		X											X							
eBP upgrades																	X	X	X				
BW Days Sales Outstanding Reports (DSO) - Build & Deploy Phase	X												X										
Binatek Upgrade	X			X																			

Critical Templates: Interdependencies Assessment

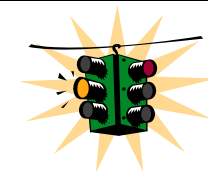
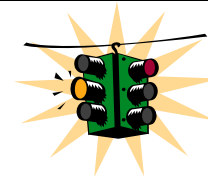
- An overall template was used to track the initiatives that have interdependencies
- The tool was used:
 - ♦ To ensure all initiatives were aware of the interdependencies
 - ♦ As input to assess risks should an initiative not be deployed
 - ♦ As input to a Contingency Planning exercise
- **Owner: MR Deployment Manager**
 - ♦ Completed by each initiative lead within the first three weeks of the MR cycle



Tip
Template

Critical Templates: Know Your Interdependencies

Project	SM Bundled SIRs	CRM Bundled SIRs	OTC Bundled SIRs	EM SIR 59962 - Intl Items in Distribution Flash Report	Rating Web Services Phase II	ROSS Release 10.3	OBC Bundled SIRs	AMS Stabilization SIRs	Driver Order Release	PDT Replacement Phase B	IRMA	Light Packet	DRS
SM Bundled SIRs	█												
CRM Bundled SIRs	█	█								X			
OTC Bundled SIRs	█	█	█				X			X			
EM SIR 59962 - Intl Items in Distribution Flash Report	█	█	█	█									
Rating Web Services Phase II	█	█	█	█	█					X			
ROSS Release 10.3	█	█	█	█	█	█				X			



Critical Templates: Test Platforms

- A template was used to assess the test platform needs for each initiative in the release
- The tool was used as:
 - ♦ A determinant of platforms for testing
 - ♦ Input to ensure the platforms needed were available
 - ♦ Input to assess risks should an initiative not be able to test on all recommended platforms
 - ♦ Input to Regression Testing team to assess testing on multiple platforms
- Owner: MR Test/Environment Manager
 - ♦ Completed by each initiative lead within the first three weeks of the MR cycle



Tip
Template

Critical Templates: Test Platforms (cont.)

Product Test Platforms	CGI Certified/ Supported Platforms (Canada Post)					Purolator Platform	Innovapost	Non Supported Platform (Home Based)		
Projects	Win 2000 IE 6.0 SAP GUI 6.40 PL11	ROSS 10.1 Win XP IE 6.0	ROSS 10.2 Win XP IE 6.0	ROSS 10.3 Win XP IE 6.0	Windows 3.1	Win 2000 IE 6.0 SAP GUI 6.20*	Win 2000 IE 6.0 SAP GUI 6.40 PL11	Windows XP IE 6.0	Windows 98 IE 6.0	Windows 98 I.E. 5.5
SM Bundled SIRs										
SYNAPPS Version 5 Upgrade										
RECON										
UPU Reengineering The International Postal Stream - Phase 1c										
Rating Web Services Phase II										
ROSS Release 10.3										
OBC Bundled SIRs										

Critical Templates: Volumetric Questionnaire

- The template was used to assess the need to do performance testing on initiatives in the release
- The tool was used as:
 - ◆ Input for the Architecture team for performance testing assessment
 - ◆ Input to ensure hardware uplifts are implemented and tested
 - ◆ Input for risk assessment should an initiative identify potential performance testing issues
- MR Test/Environment Manager is accountable to ensure each initiative lead completes the template



Tip
Template

Critical Templates: Volumetric Questionnaire (cont.)

Volumetrics Questionnaire - Project Name - date				
completed by:				
Part 1 - Individual Projects must complete the following questionnaire and submit to PPQA and the Performance Review Contact (Blair Ang				
	Activity / Area of Concern	Impact Yes / No (or N/A)	Impact Volume	Performance Review Team Approval
1	Are there new database tables			
2	Are there new database elements (fields, objects)			
3	Is there an increase in transactions (records)			
4	Is there an increase in new end users (e.g. SAPgui users)			
5	Is there an increase in new Web users (e.g. SAP Webgui users)			
6	Is there an increase in the # of users connected simultaneously			
7	Number of user connections per period of time (per hour/day/month/year)			
8	Are IDOC counts increasing			
9	Has End-To-End testing raised any System Performance Concerns			
10	If applicable, has the application vendor been consulted on the optimum computing environment to handle business volumes?			
11	How many custom objects/code/report is the project deploying and what functional areas do these impact? What will be the frequency of execution?			
12	Will there be any terminal server/Citrix emulation required to access the application by end users			

Critical Templates: Deployment Questionnaire

- The template was used to assess deployment needs for all individual initiatives in the release
- The tool was used as:
 - ♦ Input to the release's Deployment Plan
 - ♦ Input to determine outage windows and transport durations
 - ♦ Input to determine security requirements
 - ♦ Input to determine any anomalies for a specific initiative
 - ♦ Input to determine run book changes and Change Management Records
- Deployment Manager is accountable to ensure each initiative lead completes the template



Tip
Template

Critical Templates: Deployment Questionnaire (cont.)

Project Name/Description:			
Deployment Prime:			
<i>Comments</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
Please provide a brief description of your initiative			
Does this project affect SAP?			
Does this project deploy new code?			
Does the project modify existing code?			
Does this project deploy new third party software? If so, what are the software media and license requirements and what resources will be installing the software?			
Does this project deploy new hardware?			
Do the program changes affect batch or online			
Does the project affect billing and invoicing processes?			
Do cutover activities need to occur during maintenance window? If so, what types of activities require a system outage?			
Does the project add new interfaces or modify existing interfaces? If so, which interfaces?			
Are changes to run books required?			
Does this project have deployment dependencies on other projects? If so, provide a brief description			
Does this project require a knowledge transfer to the CPC Help desk?			

Critical Templates: Go/No-Go Decision

- The template was used to assess readiness to deploy!
- The tool was used:
 - ♦ As gating for the approving body for initiation of deployment weekend
 - ♦ To track that all key signoffs had been received and that each initiative was “ready to go”
 - ♦ To ensure all approving bodies were represented
- Owners: MR Deployment Manager, accountable MR Director



Tip
Template

Critical Templates: Go/No-Go Decision (cont.)

Project	Project Prime	Go/No Go Criteria						Managed Release Go/No Go Decision Prime Summary	Go/No Go Decision Primes				Go/No Go Decision
		UAT Signoff Complete	CMRs Approved	Cutover Plan Complete	PPQA Status Green	PreCutover Activities On Track	Stabilization Strategy Complete		Go/No Go Project Primes	AM / Director - Joanne	AM Director - Tim	MR Director - Laura Mitchell	
SIR 59962 - International Items in Distribution Flash Report - Phase 1	Chantal 555-6392	EM SIR UAT Sign-off	N/A	Yes	Exempt	Yes	Yes	Chantal / Tim / Laura	Go		Go	Go	Go
Sourcing Management Bundled SIRS	John 555-6443	Yes	12404279 (July 1st)	Yes	Break / Fix	Yes	Yes	John / Joanne / Laura	Go	Go		Go	Go
Rating Web Services Phase II	Michele 555-3316	RWS UAT Sign-off	12395118 12403895	Yes	Green 3 Conditions	Yes	Yes	Michele / Parnell / Kevin / Laura	Go			Go	Go
ROSS Retail Release	Mike 555-6180	ROSS UAT Sign-off	12385731 12389410 12392282	Yes	Green	Yes	Yes	Mike / Tracy / Joanne / Kevin / Laura	Go	Go		Go	Go

Critical Templates: Deployment Plan

- The template was used to plan and execute all pre-deployment, deployment, and post-deployment activities



- Owner: MR Deployment Manager
 - ◆ Accountable for creation and successful execution of the plan
 - ▶ Tracks all discrete tasks, including time allocated to perform those tasks



Critical Templates: Deployment Plan (cont.)

- The tool was used as:
 - ◆ A vehicle to monitor and track all deployment activities
 - ▶ All deployment primes input key deployment tasks
 - ▶ All technical support services and infrastructure tasks were built-in
 - ▶ All dependencies between tasks were factored in
 - ▶ All resource dependencies were identified, including page-outs to awaiting teams/resources



Tip
Template

Critical Templates: Deployment Plan (cont.)

- The tool was used as: (cont.)
 - ♦ A vehicle to monitor and track all deployment activities (cont.)
 - ▶ Used as a means of communicating progress
 - ▶ Used to track issues occurring
 - ▶ Deployment meetings preset in the plan
 - ▶ Contains tabs for:
 - *Change Management Requests/System Incident Reports, User IDs to be unlocked, status updates, escalation contacts, contingency plans, system outages, technical upgrades, conference calls, pre-cutover activities, cutover activities, post-cutover activities*



Tip
Template

Critical Templates: Deployment Plan (cont.)

Task	Impacted Environment	Resource Type	Person	Start	End	Duration (hours)	Comments	Status
Status conference call 555 5141, access code 3338327. Update MR3 technical status line.	All	MR3 Team	Trevor	Fri Jun 23, 06 18:00	Fri Jun 23, 06 18:30	0.50	CRM, CMG Redesign, RSRMS, PBX, DOA and EST project team must be represented at this call. Transporter, Duty Manager, CGI prime, P62 (CGI) must also be in attendance. This call is to confirm that Transports are in "Requested" status, to status the Technical Upgrades and ensure CRM, CMG, RSRMS, PBX, and EST project team is ready to start migrating transports.	0%
Update MR3 Technical Status Line	All	MR3 Team	Trevor	Fri Jun 23, 06 18:30	Fri Jun 23, 06 18:30	0.00		0%
Update Innovapost Run Support Status Line	All	055 (SAP OPS)	Liz	Fri Jun 23, 06 18:30	Fri Jun 23, 06 18:30	0.00		0%
Backup the existing code	RSRMS PROD	057	Sylvain	Fri Jun 23, 06 19:00	Fri Jun 23, 06 19:30	0.50		0%
Migrate the new DLL to the production environment	RSRMS PROD	057	Sylvain	Fri Jun 23, 06 19:30	Fri Jun 23, 06 20:00	0.50		0%
Migrate transports for CMG Redesign and CRM bundled SIRs	PC1	G1269 (SAP OPS Transports)	Chris	Fri Jun 23, 06 21:00	Fri Jun 23, 06 23:00	2.00		0%
Chris Deck to open PC1 when transports are complete, contact Maurice Aubin, Lynn Lebarge from Security, and release SAPACC account information SIR 64571	PC1	G1209 (SAP OPS Security)	Chris	Fri Jun 23, 06 23:00	Fri Jun 23, 06 23:00	0.00		0%

Critical Templates: Deployment Issues Log

- The template was used to track all issues that occur during a deployment weekend
- The tool was used as:
 - ♦ Means to document/manage all issues arising during deployment
 - ♦ Support for the continuous improvement effort
- Owner: MR Deployment Manager



Critical Templates: Deployment Issues Log (cont.)

Issue #	Team	Description	Identified	Resolved	Resolution	Follow-up Required
1)	TSS Middleware	<p>Staging Bugseye was not available; Dean W opened TT# 12413318 for CGI to investigate.</p> <p>DNS (at Innovapost) does not return a value for this hostname (which is why John can't access it). Other CPC hostnames are working (although I only checked a couple). DNS (at CPC) returns a value, which is (in my opinion) incorrect. It is returning the backend IP (10.130.x.x) rather than the front-end IP (10.100.21.xxx).</p>	June 23 – 12:40 PM			Follow up sent to Dean and John on Monday, June 26, 2006
2)	Security	<p>Late User Id updates arriving from Security.</p> <p>After looking at the list of User Ids to be unlocked for MR3, Security discovered that 5 of the userids didn't exist in SAP. They were reviewed with the Basis Team and they were able to find the valid/correct userids for 4 of the 5 users. Doug is following up with the EST Team to see if they can provide a valid userid for the remaining "anomaly".</p>	June 23 – 2:18 PM	June 23 – 2:55 PM	User ID listing was updated, and incorporated within the MR3 Deployment Plan.	<p>LL</p> <p>The Security Team should be involved in these activities but it should be clearly defined who is doing what...and when within the MR deployment plan</p> <p>CLOSED</p>

Critical Templates: Stabilization Log

- The template was used to track all issues after the deployment weekend – the stabilization period
- The tool was used as:
 - ♦ A means to document all issues that arose after an MR deployment by individual initiative
 - ♦ Input to the MR Deployment Report and input to the corporate measurement program
- Owner: MR Deployment Manager



Critical Templates: Stabilization Log (cont.)

MR3 2006 Fallout				
#	Project	Description	Prime	Issues Reported - Critical or High Production SIRs after Go-Live
1	SIR 59962 - International Items in Distribution Flash Report - Phase 1	Changes required to the Distribution Flash Report - Break out the OFD Only column into two OFD Only International and OFD Only Domestic.	Chantal 555-6392	20060626: No issues 20060627: No issues 20060628: No issues 20060629: No issues 20060630: No issues
2	Sourcing Management Bundled SIRS	Various minor enhancements and change requests for the Sourcing Management group, which includes EBP, Accounts Payable, Travel and Procurement (MM). See back up slides	John 555-6443 Ginny; Nathalie	20060626: No issues 20060627: No issues 20060628: No issues 20060629: Low SIR re workflow on req'n limit. Resolved friday 20060630: No issues
3	Driver Order Acceptance	Project will address scheduled and on demand pick-up process through the use of R/3, EM, PDT's & IRMA	Jill 555-9380 Joel	20060626: 2 issues: 1 non-issue; 2 transports Mon nite to fix second issue. Billing output changes transport mon night. WCL issue ongoing. CPC validation ongoing. 20060627: one issue uncovered during landing tests: interface for pick-up info does not create handlers in EM. Have until July 04 to resolve. 20060628: Interface fix in wed night. issue found with 2 objexcts in R/3. determining if it is bad data or code. 20060629: interface issue fixed wed night; object issue is data related, need to fix data. 20060630: data issues resolved; crm transport and R/3 sec transport fri night as per plan; interface testing continues 20060704: 2 b/f + 2 CR;

Critical Templates: Lessons Learned

- The template was used to document the Lessons Learned items from an individual MR
- The tool was used to:
 - ♦ Solicit input from the initiative leads
 - ♦ Manage the Lessons Learned work session
 - ♦ Document the amalgamated Lessons Learned items and planned improvement areas
- Owner: Divided by activity between MR Deployment and MR Test/Environment Managers



Tip
Template

Critical Templates: Lessons Learned (cont.)

Area for Improvement:	Tech Upgrade / PE Affects.
Description:	<ol style="list-style-type: none"> 1. Lack of a structured test plan and timeline for the technical upgrades introduced risk to all initiatives in the release. 2. Major tech upgrades at the same time, as major functional deployments don't make for good companions. The late EM tech deployment into SE1 and the request for project teams to "re-test" at the last minute - even though test teams had often been dispersed, and these extra testing costs were not budgeted for, could have been handled better. I noticed a lack of "empathy" from the MR team relating to the difficulty this caused some of the teams. 3. How can we get better at assessing ability to effectively deploy tech upgrades, knowing environments are not the same 4. Multiple tech upgrade plans were difficult to manage - excel can only manage so many lines due to multiple tech tabs in the master plan.
What should be done differently for MR3:	<ol style="list-style-type: none"> 1. Tech upgrade team to coordinate and plan testing activities with respective functional teams early in the MR cycle. MR4 is the next MR with tech upgrades, so this planning could start now. Need to discuss planning session with tech , AM teams to review plans. 2. Project teams need far more warning as to the impact of Tech upgrades, as the extra testing needs to be managed in terms of resources, budgets and timelines. With Execution phases being continually squeezed by the ever more rigorous requirements of the MR and PRA/PPQA processes we just don't have much slack in budgets or timeline to adjust to unplanned demands. I now find myself going back to my client for sympathy and counseling - honest! 3. Integrate the technical plans 4. Ensure SAP experts are on standby when critical components, known to have had problems, like portals, are being upgraded.

What We'll Cover ...

- Who are we, and what is our business landscape?
- Why did we consider a Managed Release (MR) Program?
- What does our MR Program look like?
- What are the key processes and templates required?
- How did we manage a significant SAP upgrade within the MR program?
- What lessons did we learn along the way?
- Wrap-up

Case Review: SCM Upgrade Implementation



SCM upgrade from 1.1 to 4.1 is part of our long-term enterprise upgrade program
Concern: Upgrading large SAP components while maintaining a business as usual IT model

- The issues:
 - ♦ Three-day outage needed to complete all tasks
 - ♦ Significant application development project being deployed at the same time
 - ♦ Government tax change announced
 - ♦ Had MR2 and MR3 being deployed during the SCM work program

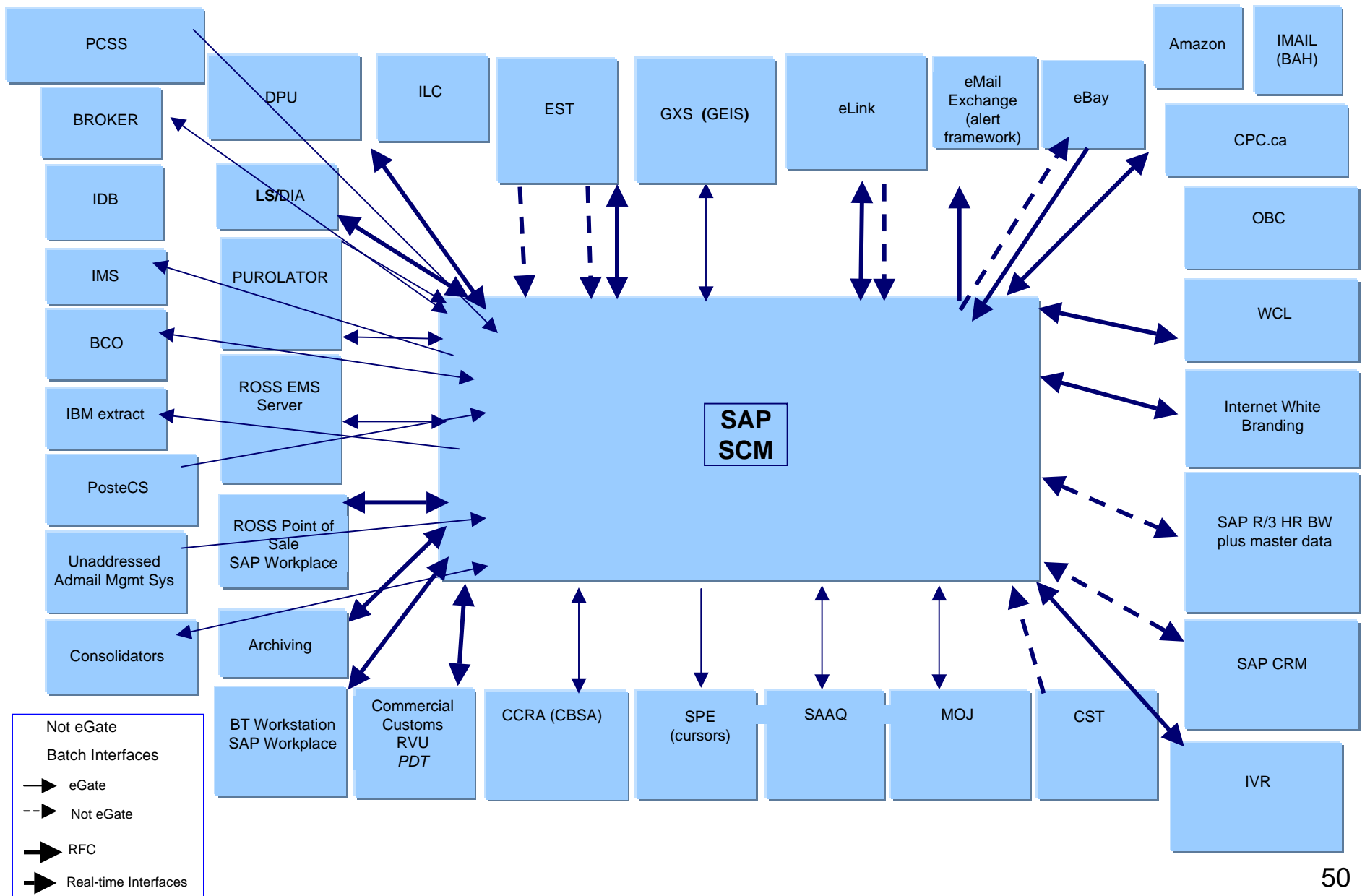
SCM Upgrade Implementation: Doing It All!

- Processes used to meet all business and infrastructure needs:
 - ♦ Amalgamation: MR2, MR3, Driver Order Acceptance project, SCM
 - ♦ MR Deployment Manager joined the SCM team to support creation of the Deployment Plan
 - ♦ Driver Order Acceptance moved to MR3
 - ♦ SCM Kernel and Oracle upgrade moved to MR2

SCM Upgrade Implementation: Doing It All! (cont.)

- Processes used to meet all business and infrastructure needs: (cont.)
 - ♦ Implemented brownout period — MR Director supported weekly evaluations
 - ♦ Blackout period introduced
 - ♦ Every upgrade performed in the Development and Staging environments closely tracked to extrapolate actual upgrade timelines
 - ♦ Created a timeline for a No-Go decision — contingency plan to back out

SCM Upgrade Implementation: Application Map



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Lessons Learned: Structure

- **MR is a repeatable process**
 - ♦ Confidence builds over time
- **Use standardized tools and templates**
 - ♦ Synergy builds with common tools
- **Plan for the anomalies**
 - ♦ Create an ability to deliver outside the program when essential
- **Plan well in advance**
 - ♦ MR dates defined at least a year in advance
 - ♦ Formal kickoff meetings and then weekly standardized MR meetings



Lessons Learned: Tenacity

- Expect some “kicking and screaming”
 - ♦ Every organization has cowboys and nay-sayers
 - ♦ Operating outside your comfort zone takes more time for some than others
- Expect to hear “It doesn’t apply to me”



Lessons Learned: Staying Nimble

- **Create necessary processes**
 - ◆ But keep it simple and easy to do
- **Have a small core MR team**
 - ◆ Soft skills are critical
- **Treat the MR team as a flow-through team**
 - ◆ Factor transition into the team's program
 - ◆ Offers the opportunity to broaden scope and increase visibility
 - ◆ Helps mature the program



Lessons Learned: Plan, Do, Check, Act

- **Improvement is possible**
 - ♦ Team ownership drives the overall success and group norms
- **Take corrective action when necessary**
 - ♦ Speed is essential and creates a strong committed community
- **Lessons Learned sessions help you grow**
 - ♦ Every MR is unique = always something to learn
- **Be prepared to confront issues immediately**
 - ♦ Chasing initiative leads for deliverables does happen
 - ♦ Escalation is an accepted option, to be used sparingly



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Resources

- Chris Miller, “New Managed Release Program Keeps Canada Post Nimble” (*SAP NetWeaver Magazine*, Volume 2, Issue 4, Fall 2006).
- “New Managed-Release process helps manage change” (*Canada Post Performance Magazine*, March/April 2005).

7 Key Points to Take Home

- Introducing an MR is a culture change
- An MR program is effective in a mixed SAP/non-SAP environment
- An MR program enables you to do more while decreasing production issues and improving efficiency
- You must have processes and standard templates
- Rigor does not mean rigidity — manage the difference
- Client community buy-in is a critical success factor
- Be realistic — it will take time for the nay-sayers and the cowboys to buy in



Your Turn!



Questions?

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