


Engage, Prepare, Migrate, Support: A Framework for Client Migration

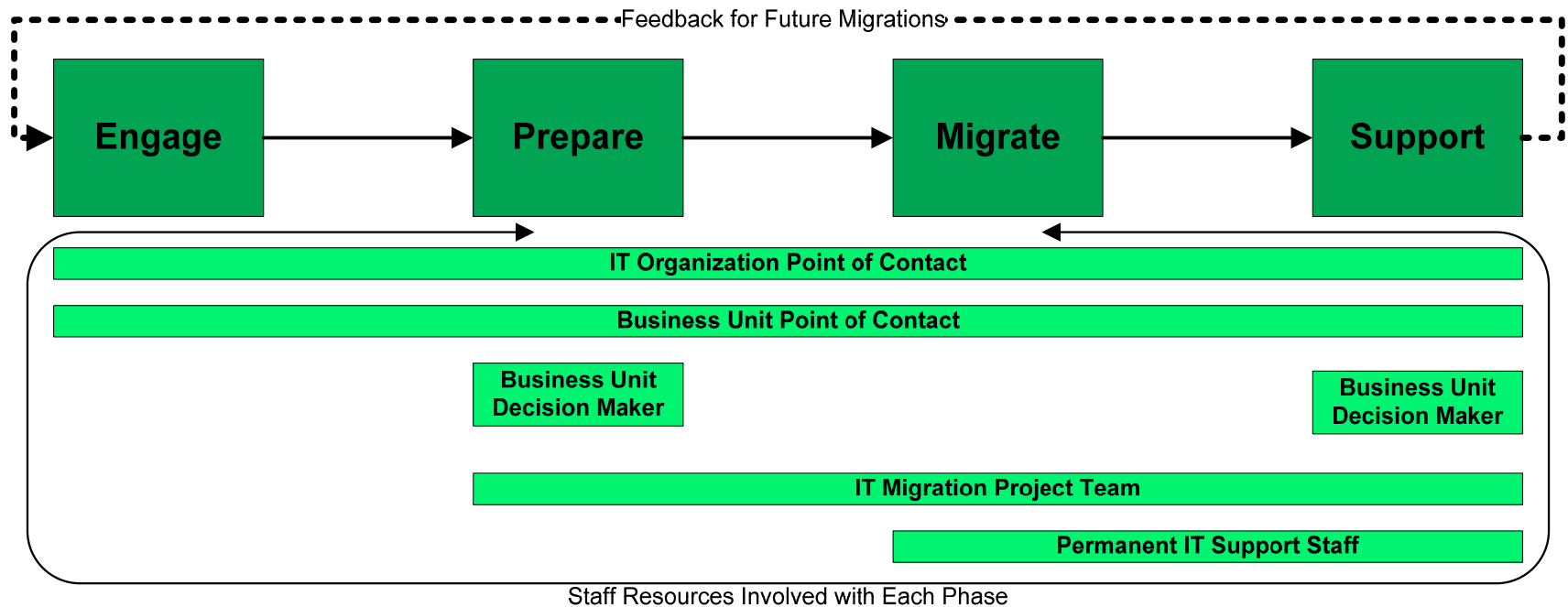
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Overview of EPMS Framework

- Provides a migration process that creates a positive client experience in an IT service migration
- Targeted at supporting existing Business Practices within the new IT service
- Provides a consistent, yet technology agnostic approach to migration
- Provides for single points of contact within the IT Organization and the Business Unit
- Places the Business Unit in a decision making role for critical business decisions
- Provides for shared answerability for tough decisions

EPMS Framework



An Approach to Change

- *The Heart of Change* John Kotter and Dan Cohen

1	Increase urgency
2	Build the guiding team
3	Get the vision right
4	Communicate for buy-in
5	Empower action
6	Create short-term wins
7	Don't let up
8	Make change stick

Foundations for a Successful Migration

- Well Defined Project Plan
 - Clear Scope
 - Established Project Team
 - Project Sponsor Commitment
- Clear Communications Campaign
 - What will happen
 - When it will happen
 - Why it will happen

Engage

- Communicate the forthcoming change with the Business Units
- Introduce the retirement procedure of the current technology
- Define the support environment for the new technology
- Explain why the change is happening
- Request information from the Business Unit need to complete the transition
- Remember: Change is scary! Sell the Change!

Prepare

- Receive and review Business Unit information
- Conduct design and planning sessions with the Business Unit as needed
- Normalize data into a format usable by the IT Organization to create accounts, quotas, etc.
- Complete IT Back Office preparations
- Develop written migration plan
- Receive sign-off from Business Unit on the migration plan

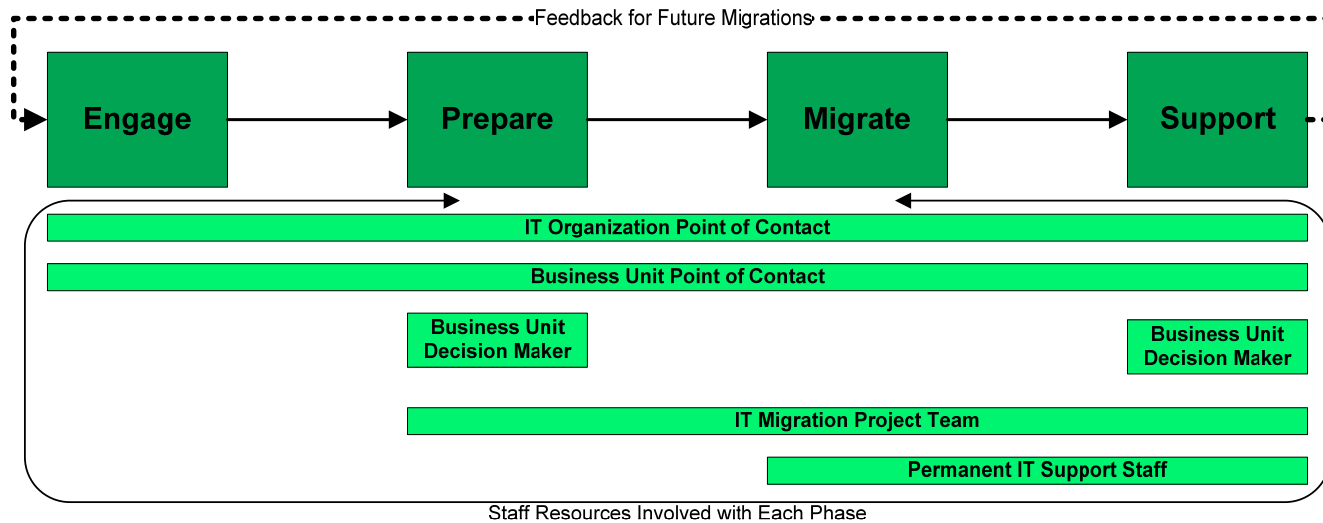
Migrate

- Actual migration takes place
- User access to the legacy environment is removed as soon as possible
- Support for the short term should be provided directly by the migration team if possible or a dedicated support center queue should be established

Support

- Support is transitioned to the permanent support organization
- Clients should be surveyed post migration
- A follow-up meeting with the Business Unit should be scheduled to ensure satisfaction
- IT Organization should be receive sign-off from Business Unit decision maker that the migration has been completed per the migration plan

Roles in the EPMS Framework

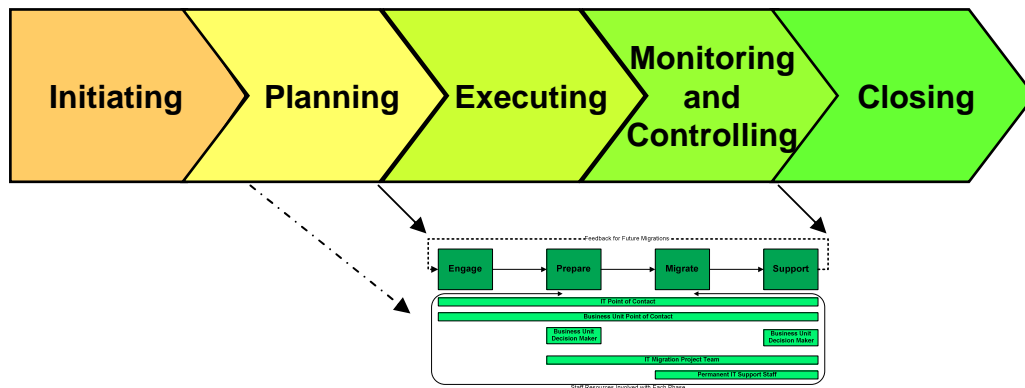


- IT Organization Point of Contact
- Business Unit Point of Contact
- Business Unit Decision Maker
- Ongoing Support Staff
- Permanent IT Support Staff

Feedback and Continuous Process Improvement

- The EPMS Framework is build on the premise of a continuous process improvement
- Lessons learned from one migration should be applied and realized in future migrations
- The organization will create efficiencies over time
- Don't be so focused on process that loose sight of potential improvements

EPMS and Project Management



- Migration specifics are defined in the Planning Process Group
- Process is executed in Executing Process Group and revised with Monitoring and Controlling Process Group
- Individual Business Unit migrations exist as Tasks or Project Phases

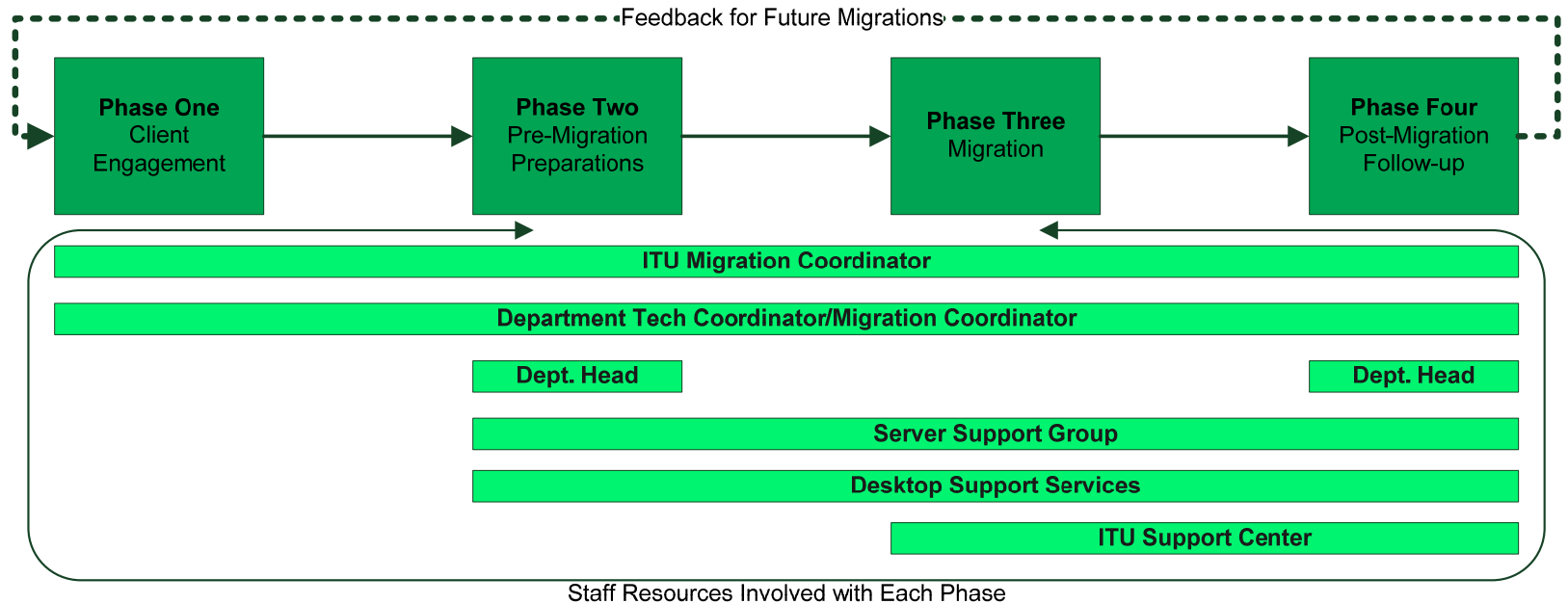
An Approach to Change, Revisited

1	Increase urgency	Pre-Migration communication campaigns
2	Build the guiding team	Defining the Project Team
3	Get the vision right	Developing and sticking with a the project plan
4	Communicate for buy-in	Engaging the Business Unit
5	Empower action	Involving the Business Unit in decisions
6	Create short-term wins	Delivering early and successful migrations
7	Don't let up	Stick to the time table you commit to
8	Make change stick	Ensure your support environment is ready to support the Business Units on Day 1 and Day 100

Case Study: George Mason's MESA Project

- LAN Architecture Migration
- Current State: Centrally Support Novell Architecture and a mixture of departmentally systems
- Future State: Mason Enterprise Services Architecture (MESA) which utilizes open source components such as MIT Kerberos and Andrew File System (AFS) and Microsoft Active Directory for Windows Desktop Management

MESA Specific Framework



Engage

- Initial informational meeting with department head and tech coordinator
- Migration questionnaire distributed
- Migration overview communicated to department
- Novell retirement procedure introduced
- MESA demonstration coordinated

Prepare

- Migration questionnaire completed
- Accounts are configured
- Local network configured for MESA
- Departmental container created in the AD
- User classes and related permissions are defined
- Printing is configured
- Departmentally shared network file space is configured

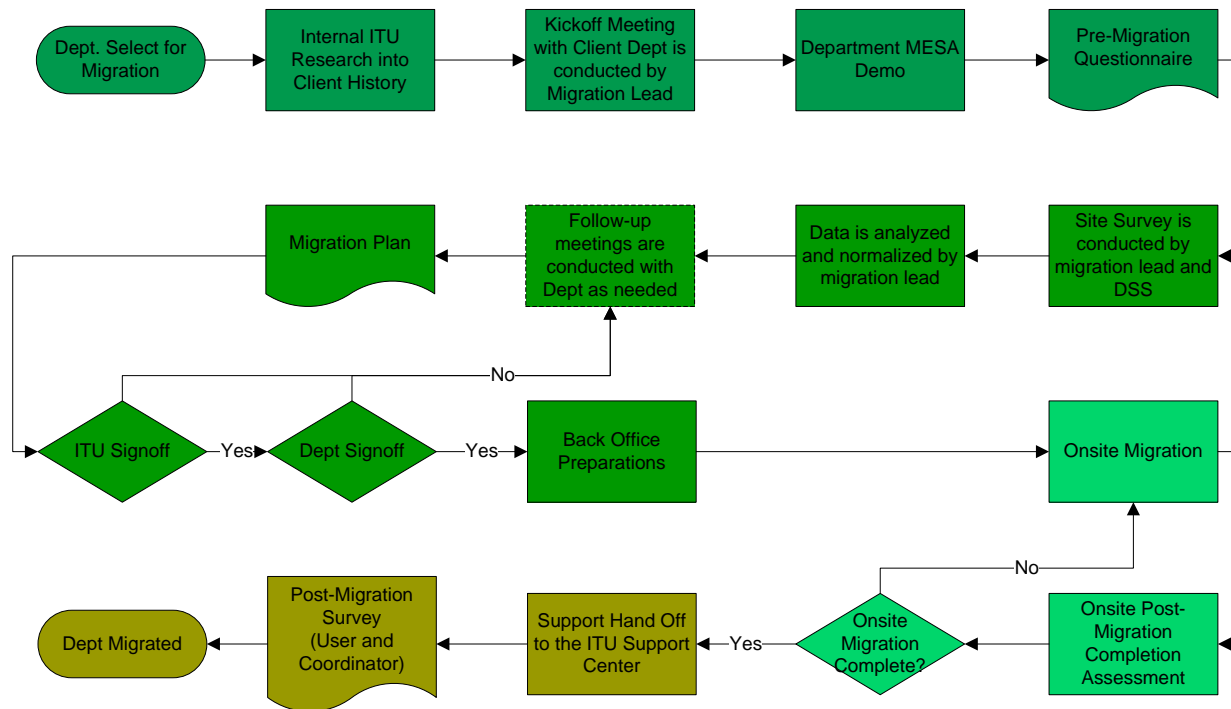
Migration

- Actual migration process begins
- Novell files become read only
- MESA components are installed on desktops
- Local Profiles are migrated
- Software applications in Novell space are migrated
- Support for the next five business days is provided directly by the migration team

Support

- Novell Accounts are disabled
- Post-Migration Surveys are distributed
 - Individual Users for their experience
 - Tech Coordinator for feedback on the overall migration process
- Follow-up meeting with the department head and the tech coordinator

MESA EPMS Process Flow



Status

- Currently working on migrating IT Unit to validate processes
- Two external Business Units that were piloted (Student Health Services and George Mason University Foundation) enjoyed great success and are very happy clients

Lessons Learned

- Ensure that there is a good balance of Business and Technical in the development process
- Minimize Scope Creep and changes to the technical environment after migrations have begun
- Spend the time to ensure your support organization is at the same place as your project team

Questions?



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