

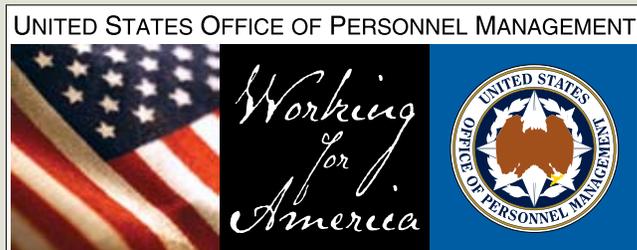


UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

## MIGRATION PLANNING GUIDANCE TEMPLATES

## MIGRATION KICK-OFF MEETING PRESENTATION

October 7, 2011





*A New Day for the Civil Service*

## **Human Resources Line of Business**

**[Customer Agency] / [SSC]**

**Migration Kick-off Meeting**

**[Date]**



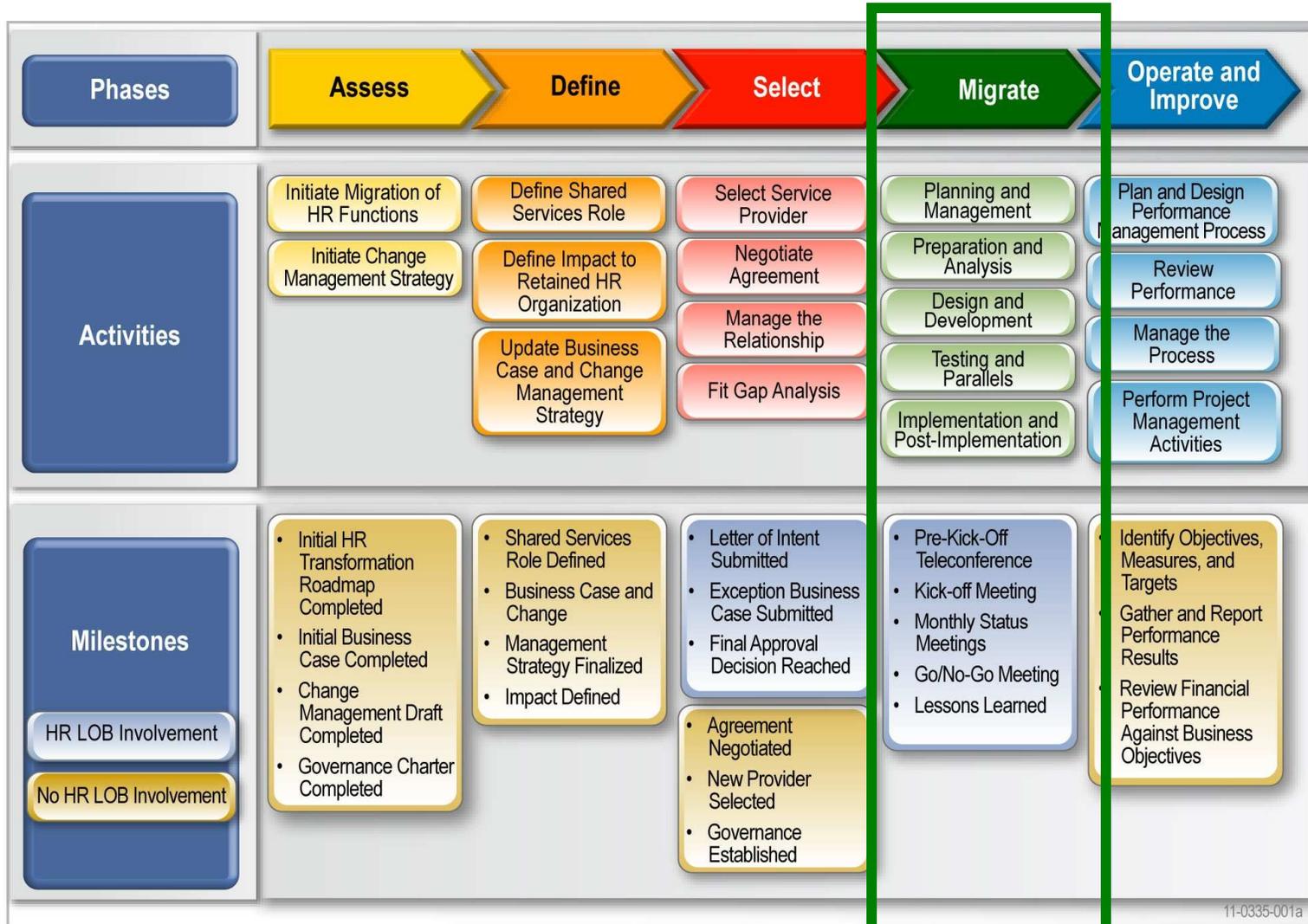
# Migration Kick-off Meeting Agenda

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1. Migration Roadmap
2. Roles and Responsibilities
3. Process Overview
4. Migration Initiation Meetings
5. Migration Management Meetings
6. Migration Exit Meetings
7. Action Items
8. Migration Deliverables

# Migration Kick-off Meeting

## Migration Roadmap



11-0335-001a



## Migration Kick-off Meeting Roles and Responsibilities

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- **Key participants:** Customer Agency, SSC, HR LOB
- **HR LOB Contacts:**
  - The HR LOB will provide managing partner oversight of migration activities to ensure a successful migration
  - Customer Agency, SSC, and the HR LOB will work together to ensure that migration is completed within predetermined cost and schedule



## Migration Kick-off Meeting Process Overview

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- **Migration Initiation:** Process begins after OMB and the HR LOB approve Customer Agency's exception business case submission
  - Kick-off Meeting
- **Migration Management:** Process is managed by Customer Agency and SSC and monitored by the HR LOB through deliverables submitted by Customer Agency
  - Monthly Status Meetings
  - Go / No-go Meeting
- **Migration Exit:** Process concludes with migration close-out and gathering of lessons learned
  - Lessons Learned Meeting



## Migration Kick-off Meeting

### Migration Initiation Meetings

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- **Kick-off Meeting:** HR LOB hosts a kickoff meeting with Customer Agency and SSC to:
  - Identify Customer Agency and SSC Points of Contact (POC)
  - Discuss partnership documents: Interagency Agreement (IA) and Service Level Agreement (SLA)
  - Review preliminary project timeline and costs
  - Review migration deliverables
  - Create schedule of monthly status meetings



## Migration Kick-off Meeting

### Migration Management Meetings

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- **Monthly Status Meetings:** Customer Agency hosts monthly status meetings with SSC and HR LOB to:
  - Review status of the migration
  - Ensure that critical path items are on target
  - Track performance against go / no-go evaluation criteria
  - Record lessons learned
  - Discuss and resolve issues
  
- **Decision Gate Meetings:** Customer Agency hosts meetings at which Customer Agency, SSC, and HR LOB make determination of whether a project phase is completed and the Customer Agency and SSC should move forward.



## Migration Kick-off Meeting

### Migration Exit Meetings

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- **Lessons Learned Meeting:** Customer Agency hosts a meeting within 45 days after migration completion to:
  - Document lessons learned
  - Discuss follow-up items and current status



# Migration Kick-off Meeting

## Action Items

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- Identify Customer Agency and SSC Points of Contact (POCs)
- Review status of partnership documents:
  - Interagency Agreement (IA)
  - Service Level Agreement (SLA)
- Review preliminary project timeline and costs
- Review migration deliverables
- Create schedule of monthly status meetings



## Migration Kick-off Meeting

### Migration Deliverables

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- HR LOB collects a predetermined set of migration deliverables during each migration to:
  - Establish a consistent format for migration reporting to the HR LOB
  - Validate that the Customer Agency and SSC are taking the necessary steps to ensure a successful migration
  - Review status of the migration including cost and schedule information

# Migration Kick-off Meeting

## Migration Deliverables – Migration Initiation

The Customer Agency is responsible for submitting the deliverables in these slides to the HR LOB PMO during the migration process. Some deliverables require that the Customer Agency obtain supporting information or input from the SSC.

CUSTOMER AGENCY DELIVERABLES – MIGRATION INITIATION					
Document	Document Description	Submission Responsibility	HR LOB PMO Use	Use Description	Submission Schedule
Interagency Agreement (IA)	Indicates the terms under which services will be provided to the Customer Agency	Customer Agency	Oversight	Binding document to hold provider and Customer Agency accountable	Kick-off Meeting or first availability
Service Level Agreement (SLA)	Outlines the scope of services the SSC will supply to the Customer Agency	Customer Agency	Oversight	Binding document to hold SSC and Customer Agency accountable for prescribed roles, responsibilities and cost	Kick-off Meeting or first availability



# Migration Kick-off Meeting

## Migration Deliverables – Migration Management

The Customer Agency is responsible for submitting the deliverables in these slides to the HR LOB PMO during the migration process. Some deliverables require that the Customer Agency obtain supporting information or input from the SSC.

<b>CUSTOMER AGENCY DELIVERABLES – MIGRATION MANAGEMENT</b>					
<b>Document</b>	<b>Document Description</b>	<b>Submission Responsibility</b>	<b>HR LOB PMO Use</b>	<b>Use Description</b>	<b>Submission Schedule</b>
Migration Cost Report	Establishes migration costs for Customer Agency and SSC	Customer Agency	Report / Oversight	Per MOU, OPM has responsibility to conduct reviews of HR SSC delivery against established measures and metrics. Baseline measures will aid in reporting performance progress as well as cost savings against the business case	Five business days following the end of each month.
Decision Gate Evaluation Criteria	Establishes criteria by which the Customer Agency and SSC will determine whether to move forward with the migration at critical decision gates	Customer Agency	Report/ Oversight	Sets guidelines for decision making to determine whether a project phase is completed and the Customer Agency and SSC should move forward	30 days after Migration Kick-off Meeting
Project Schedule	Establishes a schedule of migration activities performed by the Customer Agency and SSC. A mechanism to track activities and budget against schedule.	Customer Agency	Report / Oversight	Track activities against schedule. Report to HR LOB and other external agencies on migration progress. Provide for early detection of migration issues	30 days after Migration Kick-off Meeting.  The latest version of the Project Schedule must be sent five business days before each Monthly Status Meeting.



# Migration Kick-off Meeting

## Migration Deliverables – Migration Exit

The Customer Agency is responsible for submitting the deliverables in these slides to the HR LOB PMO during the migration process. Some deliverables require that the Customer Agency obtain supporting information or input from the SSC.

CUSTOMER AGENCY DELIVERABLES – MIGRATION EXIT					
Document	Document Description	Submission Responsibility	HR LOB PMO Use	Use Description	Submission Schedule
Lessons Learned Report	Summarizes the overall results of the migration and highlights any critical standardization opportunities discovered during the course of migration	Customer Agency	Review	Incorporate lessons learned into future HR LOB deliverables and activities (e.g., EA deliverables, service delivery model, future migrations)	45 days after Lessons Learned Meeting



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