Human Resources Line of Business

[Customer Agency] / [SSC]
Migration Kick-off Meeting
[Date]
Migration Kick-off Meeting

Agenda

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

Phases
- Assess
  - Initiate Migration of HR Functions
  - Initiate Change Management Strategy

Define
- Define Shared Services Role
- Define Impact to Retained HR Organization
- Update Business Case and Change Management Strategy

Select
- Select Service Provider
- Negotiate Agreement
- Manage the Relationship
- Fit Gap Analysis

Migrate
- Planning and Management
- Preparation and Analysis
- Design and Development
- Testing and Parallels
- Implementation and Post-Implementation

Activities

Milestones
- Initial HR Transformation Roadmap Completed
- Initial Business Case Completed
- Change Management Draft Completed
- Governance Charter Completed
- Shared Services Role Defined
- Business Case and Change Management Strategy Finalized
- Impact Defined
- Letter of Intent Submitted
- Exception Business Case Submitted
- Final Approval Decision Reached
- Agreement Negotiated
- New Provider Selected
- Governance Established
- Pre-Kick-Off Teleconference
- Kick-off Meeting
- Monthly Status Meetings
- Go/No-Go Meeting
- Lessons Learned

Operate and Improve
- Plan and Design Performance Management Process
- Review Performance
- Manage the Process
- Perform Project Management Activities

Identify Objectives, Measures, and Targets
Gather and Report Performance Results
Review Financial Performance Against Business Objectives
Migration Kick-off Meeting
Roles and Responsibilities

- **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

- **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
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

- **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.
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
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Action Items

- 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

- 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
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.

<table>
<thead>
<tr>
<th>DOCUMENT</th>
<th>DOCUMENT DESCRIPTION</th>
<th>SUBMISSION RESPONSIBILITY</th>
<th>HR LOB PMO USE</th>
<th>USE DESCRIPTION</th>
<th>SUBMISSION SCHEDULE</th>
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<tbody>
<tr>
<td>Interagency Agreement (IA)</td>
<td>Indicates the terms under which services will be provided to the Customer Agency</td>
<td>Customer Agency</td>
<td>Oversight</td>
<td>Binding document to hold provider and Customer Agency accountable</td>
<td>Kick-off Meeting or first availability</td>
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<td>Service Level Agreement (SLA)</td>
<td>Outlines the scope of services the SSC will supply to the Customer Agency</td>
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<td>Oversight</td>
<td>Binding document to hold SSC and Customer Agency accountable for prescribed roles, responsibilities and cost</td>
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<td>Migration Cost Report</td>
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