



RightStar's business focus is to deliver service management solutions that provide measurable value, in terms of improved efficiencies and reduced costs, to each and every one of our clients. In order to streamline the delivery of our services, RightStar has developed a standard implementation methodology based on our experience of ten years and more than 300 projects helping customers design, deploy, and maintain IT service management and support systems. All of RightStar's engagements follow this structured project lifecycle. Although the tasks and sub-tasks vary depending on the project, the phases, activities and primary deliverables are the same.

## The project lifecycle consists of the following phases:

- Contract and statement of work
- Internal kickoff and planning
- Client preparation
- Formal kickoff meeting
- Implementation planning workshops
- Design document
- System configuration
- Testing
- Training
- Documentation and knowledge transfer
- Production support
- Weekly status reports and meetings

## Contract and Statement of Work

During this phase RightStar's sales and operations departments work together to identify a client's needs and develop a solution to meet those needs. In each case we strive to identify business issues that are detrimentally affecting the client's bottom line. Our goal is to deliver a set of services that ultimately provide solutions with real value and return on investment. Oftentimes our initial approach is a paid assessment of the client's environment, so that we fully understand their needs and can provide them with an optimal solution. Although there is an up-front cost associated with this analysis RightStar is often willing to provide these services at a reduced cost or to apply a credit to future services so that we have the chance to prove our value.

## Internal Kickoff and Planning

Once RightStar and the client have come to terms on a contract and statement of work, RightStar conducts an internal kickoff and planning session in which the transfer of information from sales to delivery takes place. This transfer is expedited by the fact that the operations department is involved throughout the selling process. Additionally, a project manager is assigned and a high level project plan is developed during this phase.

## Client Preparation

During this phase the RightStar project manager assigned to the project makes initial contact with the client. RightStar identifies the primary point of contact for the client and reviews the contract at a high level to verify consensus. RightStar also sends the client several tools, typically including a project start guide and decision making guide, to assist with identifying and scheduling resources to begin the engagement. The project start guide identifies the resource requirements on the client's end and provides hardware and software requirements for technical services. It also seeks to gather basic client demographic data and IT environment data, so that RightStar can begin assigning technical resources and scheduling travel. The decision making guide provides a system overview for the specific software modules the client plans to implement and outlines the decisions and data that will need to be gathered in order to successfully deploy the technology.

RightStar provides phone support to guide the client through the preparation phase and will also come onsite to conduct pre-planning meetings when appropriate. The goal of the client preparation phase is to ensure that the client has everything necessary to engage full-time immediately following the kickoff meeting. The kickoff meeting is scheduled during the client preparation phase.

## Formal Kickoff Meeting

The project kickoff meeting allows RightStar the opportunity to meet with the client's senior management and clearly establish the project's goals and objectives. This meeting should also result in a committed senior level sponsor, who will play a crucial role in the project's future. Prior to this meeting, the RightStar project manager will review the statement of work and the assumptions with the client project manager. This allows for a controlled kickoff meeting, with the client project manager serving as the principal advocate for the project. The goal of this meeting is to set the client expectations at the highest possible level in order to minimize future issues. In addition, the RightStar manager will clearly deliver the roles and responsibilities matrix so that all parties are familiar with the team structure and task distribution.

## Implementation Planning Workshops

The implementation planning workshops (IPW) define the detailed technical implementation requirements. During these workshops RightStar solicits specific information on the customer's current business processes, the systems that support those processes, and the data that is critical to both the processes and management reporting. The processes, systems, and data are evaluated against ITIL good practices, the customer business objectives, and RightStar's experiences to identify areas for improvement moving forward. Once RightStar has a firm understanding of the customer's current environment and specific functional requirements, we begin the process of educating the customer on the technologies being implemented and guide functional design and data decision making. Initially held over a two- or three-day period, the implementation planning process actually continues throughout the project. RightStar has standardized workshop agendas for each of the technologies we deploy that provide a consistent process for conducting the planning meetings. Additionally, the decision making guide is used as a tool to guide the process and document configuration and data requirements. The IPWs result in an updated project plan and a design document.

## Design Document

The design document specifies any required changes to the system's out-of-the-box functionality. In almost all cases, the technologies currently supporting the infrastructure management processes are customizable to the client's business requirements. While this flexibility provides for a better fit between customer requirements and systems functionality, it also adds a level of complexity to the implementation

and maintenance of any technology. This flexibility, if not properly managed, can lead to project delays and budget overruns. By producing a design document RightStar can thoroughly record the changes made to the screens and functionality of the product. This document is presented to and reviewed with the client to ensure that there is complete agreement on the tasks to be done and the necessary level of effort. RightStar requires that the client sign and accept the design prior to moving forward. This also serves as a project checkpoint to ensure that the level of effort estimated in tailoring the system to the design specifications is in line with the original estimate provided in the statement of work. If the updated agreement is not acceptable to the client a project change request can be initiated.

## System Configuration

System configuration is the process of developing a solution based on the design document and the specifications identified and documented during the IPWs. Fully documenting the requirements and associated solutions makes the system configuration process run smoothly. Consultants are provided with guidelines to ensure that tasks aren't overlooked and nothing falls through the cracks. Additionally, if multiple resources are assigned then work can be coordinated without causing conflicts.

## Testing

Testing is perhaps the most critical part of a successful technical implementation and is too often overlooked. RightStar is committed to thoroughly testing system functionality prior to moving a client to production. Additionally, RightStar insists that the client be involved in the testing process. Having the client go through their typical support processes using the new technology is the only way to ensure that the system will function appropriately in a production environment. While much of the burden of testing does fall on the client, RightStar manages this process and can provide templates to help the customer get started. The design document is frequently leveraged to assist with the development of test plans and scenarios. When the client and RightStar have collectively signed off on the testing processes the project can proceed.

## Training

RightStar offers a wide variety of end-user training services that can be tailored to meet the client's requirements. Many organizations have internal training departments tasked with developing and providing training for new system rollouts. In these cases RightStar can help initiate the client's training process by providing informal train-the-trainer services and either out-of-the-box or customized training templates. Should the client need full end-user training, RightStar has standard offerings that can be customized to the client's specific system configuration and business processes. Since training requirements vary widely from customer to customer, these services are typically quoted separately. Our standard delivery services and processes include, in most cases, an informal train-the-trainer session, and we have the skills, experience, and resources to deliver more formal training if necessary.

## Documentation and Knowledge Transfer

Another critical element in the implementation of a new technology is to ensure that the client can manage and administer that technology in a relatively self-sufficient capacity once the project is complete. No organization wants to be in a position of having to pay extensive consulting fees simply to maintain an application in its production environment. Unfortunately, organizations and vendors too often overlook the importance of ongoing maintenance after a system has been deployed. RightStar is committed to 100 percent client satisfaction, and a client that cannot maintain a new technology will not be satisfied. Therefore, RightStar insists that its clients have a dedicated technical contact for the duration of the project. This ensures that knowledge transfer takes place throughout the project instead of being added as an afterthought. In addition to informal knowledge transfer throughout the project, RightStar

conducts a formal knowledge transfer process at the end of the project to ensure that the customer is prepared to take over the system. RightStar also provides full documentation on the implementation, so that the client has a point of reference for system configuration and customization. This documentation includes both a system architecture document and an audit log.

## Production Support

Going live with a new technology is always a challenging undertaking for any organization. No matter how much testing, training, and preparation has been undertaken, new enterprise software is rarely implemented without experiencing any setbacks. For this reason, RightStar always provides a certain amount of onsite support when a client begins using the new technology in a production mode. This support is intended to assist both users, with the new processes and procedures, and administrators, with troubleshooting any issues that might arise. RightStar recommends varied levels of onsite support depending on the size and complexity of the implementation.

## Weekly Status Reports and Meetings

Throughout the lifecycle of a project RightStar produces a status report on a weekly basis and conducts weekly status meetings. The status report and weekly meeting are two elements of the communication plan, which is part of the overall project plan. They comprise the primary means of communication to regularly document the state of the project. RightStar compiles the status report based on the activities of the previous week, and also uses the WBS to outline tasks for the upcoming week. Additionally, the status report summarizes key resources and contact information, financial and budgetary information, meetings and any resulting action items, unaccomplished tasks from the previous week along with reasons, project risks and actions taken to mitigate those risks, and a resource schedule.

This report is delivered to the client project manager every Monday by close of business. The client project manager is expected to review and accept the status report within 48 hours of delivery. This ensures that during the course of the project any potential issues are dealt with in a timely manner. Strict adherence to this process guarantees that, should RightStar and the client not be in complete agreement on the project's status, any confusion can be quickly resolved.

### **RIGHTSTAR SYSTEMS**

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RightStar Systems is a leading provider of ITIL-based service management solutions for upper-middle market firms and government agencies. As an Elite BMC Software Solution Partner, RightStar develops its own add-on modules and provides consulting, design, and implementation services for BMC Service Support, Service Assurance, and Service Automation products. RightStar also conducts onsite ITIL assessments and provides strategic recommendations for delivering services to the business more efficiently.