High-Performance IT

Process and Intranet Health Check

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If it's not written down, it doesn't exist.

Process

The Best Practice IT Standard is the use of a document management system, the use of a standard document template for process, how-to guidelines, and other documentation and making all work - process driven. The standard document template is particularly important, it needs to adhere to documentation management principles to aid learning and usability. Finally, all documentation types are stored on an Intranet so that documentation can be baselined and then act as a single source of truth.

IT lends itself perfectly to the use of process due to the repetitive and recurring nature of IT work. Process brings consistency, increased quality, cost-effectiveness, reduced number of tasks, and reduced project timeframes along with fewer errors. It also locks down the operational environment and reduces the number of operational resources needed by reducing the incidence of rework. It provides repeatable, consistent outcomes, and reduces the incidence of failures which in turn reduces cost. *Process is necessary because it describes how things are done and then provides the focus and foundation for making them better*.

The High-Performance IT process review is the largest review in terms of effort and time. It requires one or two dedicated resources to complete with assistance from all IT teams. It usually takes two steps to achieve the Best practice IT Standard. The benefits to the whole of the IT department are nothing short of significant with quality, performance and productivity being substantially increased and costs across the board, reduced.

Step 1. Baselined documents.

Three rules are introduced to govern the use and control of all documentation.

1. Rule 1, If it is not baselined then it does not exist. All process, how-to guidelines and other documentation must be formally documented and baselined (tested, signed off, finalised, ready for use.)
2. Rule 2, The use of baselined process, how-to guidelines and other documentation is mandatory – there are no exceptions.
3. Rule 3, Only baselined documents are held on the Intranet – to act as the single source of truth.

Step 2. CMM Level 2.

This step accepts that existing documentation templates may vary. This Step adds a single, standard documentation template based on the Capability Maturity Model Level 2, (CMM Level 2). This is a process and documentation methodology applied to software

development, infrastructure projects and business project planning. The model describes a five-level evolutionary path of increasingly organized and systematically more mature processes.

1. **Initial level:** - processes are disorganized, even chaotic. Success is likely to depend on individual efforts, and is not considered to be repeatable, because processes would not be sufficiently defined and documented to allow them to be replicated.
2. **Repeatable level:** - basic process techniques are established, successes can be repeated, because the requisite processes have been established, defined, and documented.
3. **Defined level:** - the organization has developed its own standard process through greater attention to documentation, standardization, and integration.
4. **Managed level:** - the organization monitors and controls its own processes through data collection and analysis.
5. **Optimizing level:** - processes are constantly being improved through monitoring feedback from current processes and introducing innovative processes to better serve the organization's needs.

One of the most significant benefits of using CMM level 2 is that a standard template is used for all process, how-to guidelines, and other documentation. The template has a common look and feel, includes completion instructions for the user and complies with documentation management principles making it is easy to create and use. Accordingly, all staff and especially new staff quickly learn how to use process and other documentation in the most optimum fashion. It brings a consistency of approach, improves project quality, service delivery, production support and maintenance. It reduces costs by reducing the need for rework, improves estimates, scheduling, and business outcomes.

Process Audit

Create a spreadsheet with these column headings.

1. Name: (Process name)
2. Author name:
3. Last update: (Date)
4. Location: (e.g., Intranet, other.)
5. Duplicates: (Is the process duplicated?)
6. Remove: (Is the process redundant, old, or dead? - Y/N)
7. Ad-Hoc: (Is it ad-hoc? - Y/N)
8. Draft: (Is it a draft status? - Y/N)
9. Baselined: (Is it baselined? - Finalised and signed off - Y/N)

10. Auto: (Is it a candidate for automation? - Y/N)

11. Retain: (Is it to be retained? - Y/N)

12. Work: (Does it require work? Is it incomplete? - Y/N)

13. All other IT related process documentation.

On the spreadsheet, record these document types:

1. Technical processes in use.

2. Project management processes in use.

3. Work management processes in use.

4. Gating processes in use.

5. Reporting processes in use.

6. General processes in use.

7. How-to guidelines or similar in use.

8. Methodologies in use.

9. Scripts in use.

10. Any other documentation in use.

Process Review – How to do it

1. Appoint a Document Administrator to own the Intranet and Documentation update.

2. Create standard Process and How-to Guidelines templates, preferably using the CMM Level 2 standard.

3. Look at the spreadsheet you have prepared and determine actions to be taken against each document as to its suitability to become a baselined version.

4. Identify documents to be removed from the Intranet or to be moved into a development space.

5. Create a task list of the work to be done. (See sample below)

6. If required, allocate resources from each IT team to work on that team's processes.

7. Allocate a process owner for all processes. (Owner approves the process becoming baselined and all future changes.)

8. Co-ordinate the management of the tasks or project manage to completion.

9. Mark finalized processes as baselined and load on to a production Intranet.

Sample task list

1. Appoint (as a role or position) and train a document administrator in document management principles.

2. Investigate a Document Management System.

3. What work is required to create a standard, common documentation template.

4. Create a standard Process template.

5. Create a Guidelines template.

6. Determine which documents will be kept and used for baselining.

7. What work is required to baseline the documents?

8. Determine which documents can be disposed of?

9. Determine an 'owner' and the duties of the owner for process ownership.

10. Which manual processes can be automated?

11. Arrange for work to automate.

12. Create a single version of each baselined document.

13. Convert baselined documents to the common template.

14. Review all documents, rework as required and mark each as baselined when complete.

15. Identify umbrella processes that involve inter-team workflows, (activities where multiple teams are involved with the same process) and clearly define the end-to-end process, including hand-off points and deliverables.

16. Load baselined documents onto the Intranet.

17. Investigate moving to CMM Level 2.

18. Determine further works required and scope out.

19. Introduce Due Process. (Meaning that following a process is mandatory.)