Module 1:
Introduction to MSF

MSF Overview

Module 1: Introduction to MSF	Module 6: The Developing Phase
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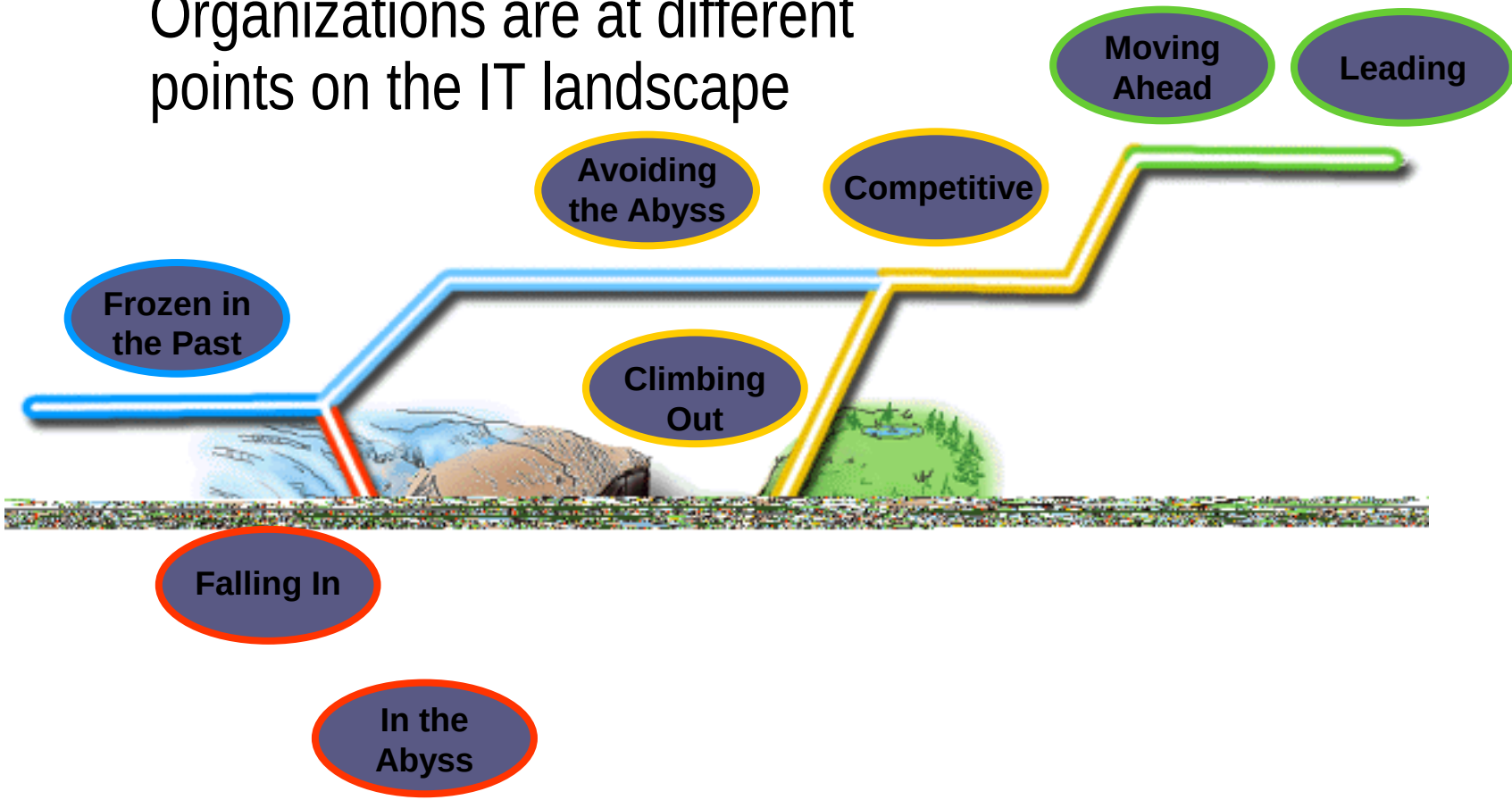
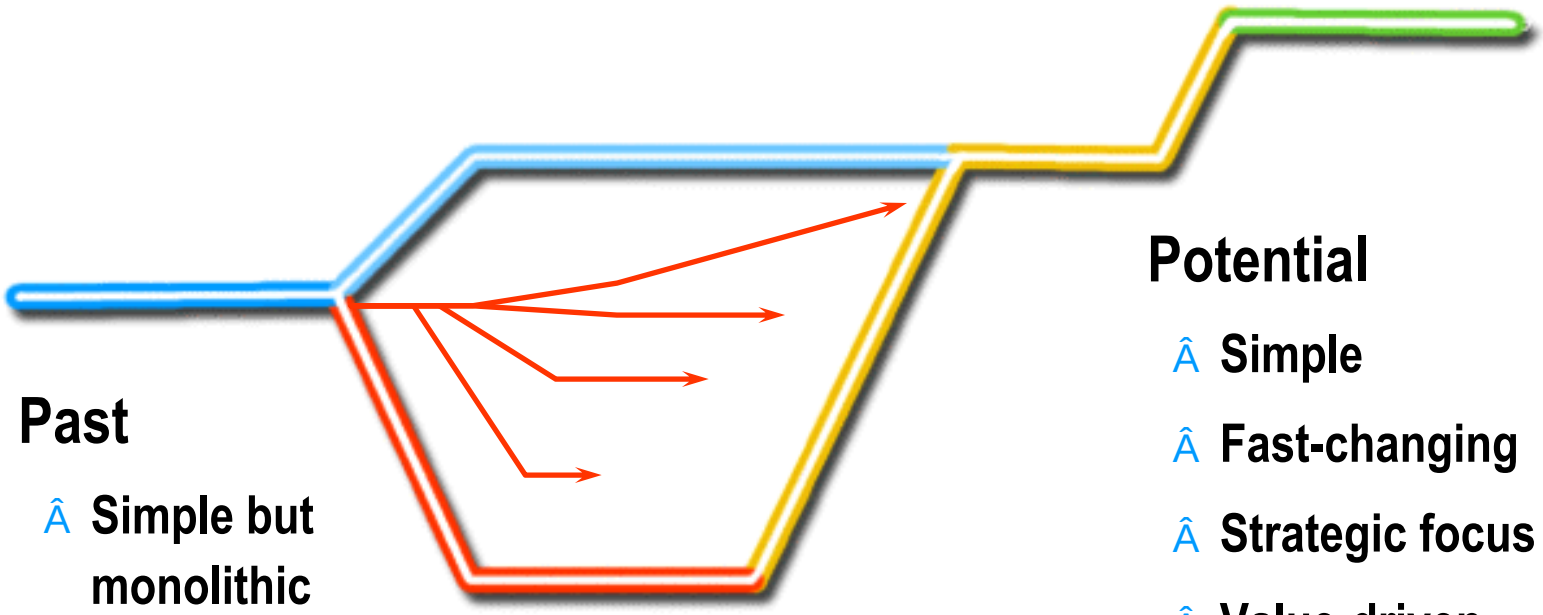
The IT Landscape

Organizations are at different points on the IT landscape



The IT Abyss



Past

- Simple but monolithic
- Slow-changing
- Tactical focus
- Cost-driven

IT Abyss

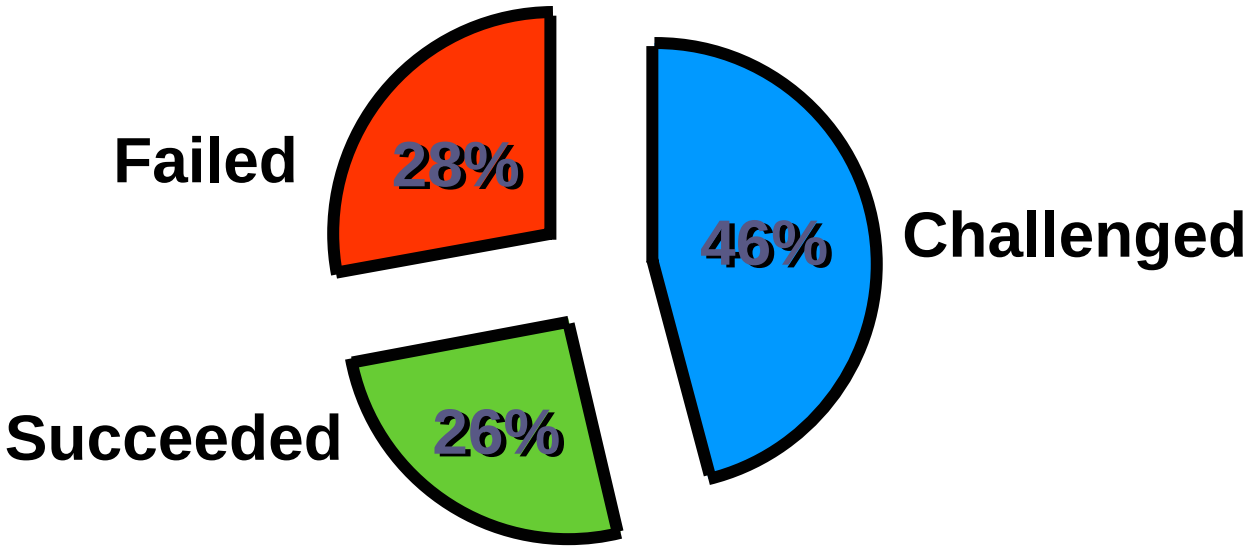
- Excessive complexity
- Ineffective delivery
- Rising costs

Potential

- Simple
- Fast-changing
- Strategic focus
- Value-driven

Value = Benefit - Cost

Standish Group Survey



- From the September 1998 issue of PM Network
- Based on more than 23,000 projects
- Challenged means completed over budget or past the original deadline

Root Causes of Failure

- Separation of goal and function
- Separation of business and technology
- Lack of common language and process
- Failure to communicate and act as a team
- Processes that are inflexible to change

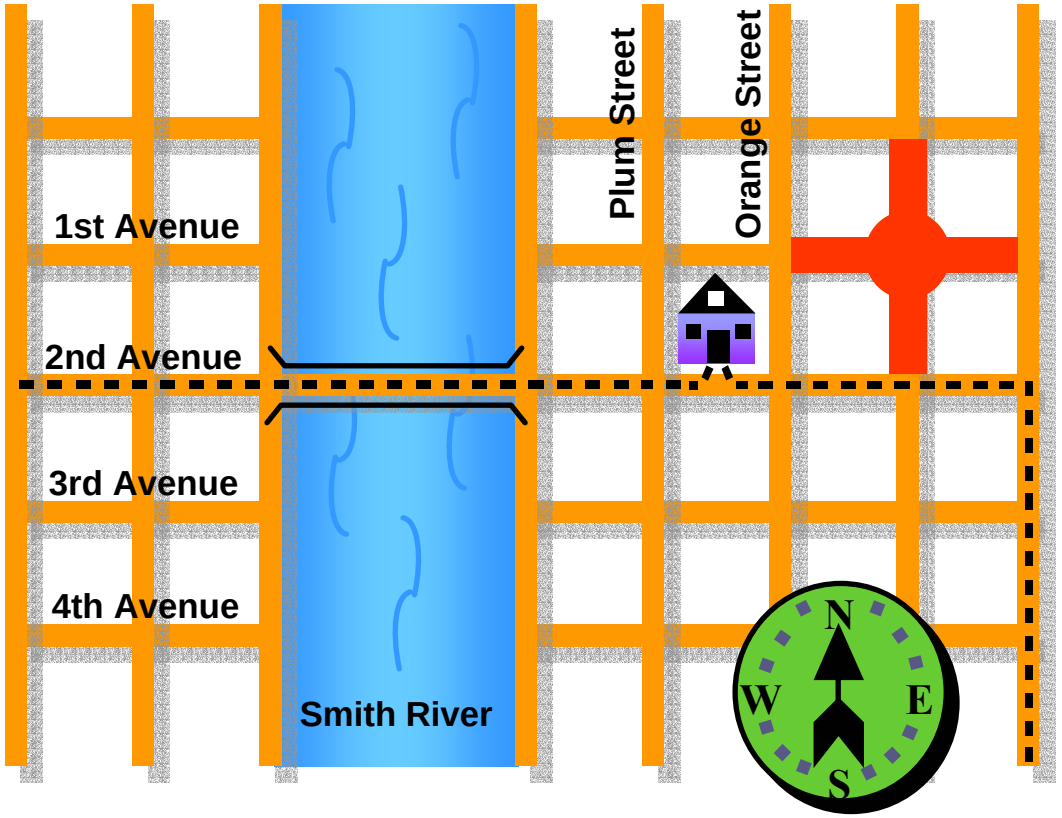
"When projects fail, it's rarely technical."

Jim Johnson, The Standish Group

Framework: Supplementing Methodologies

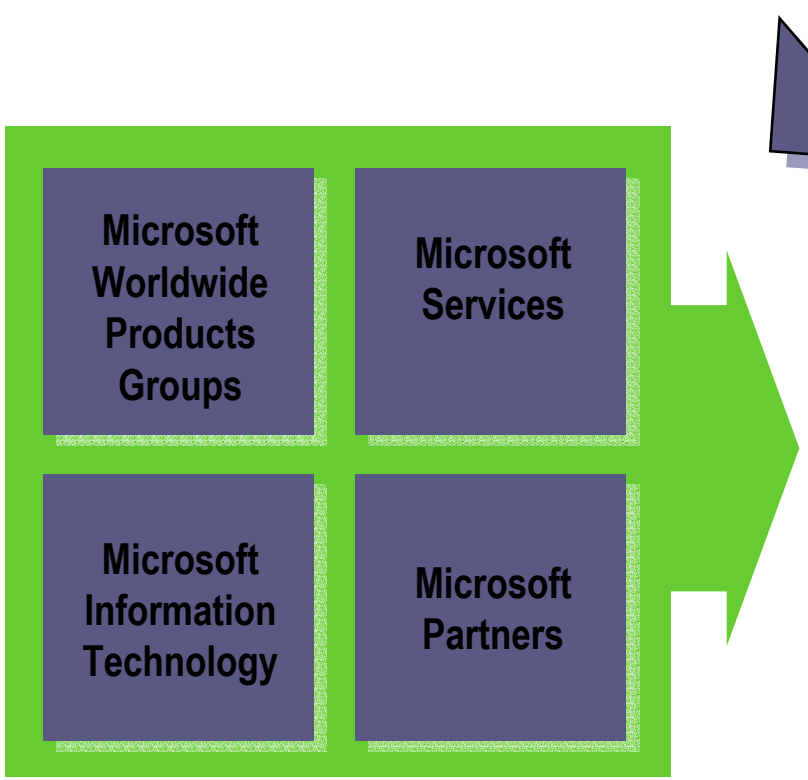
A **methodology** applies specific directions to a known destination

A **framework**, like a compass, verifies progress and provides directional guidance



A framework is a methodology partner!

Origins of MSF



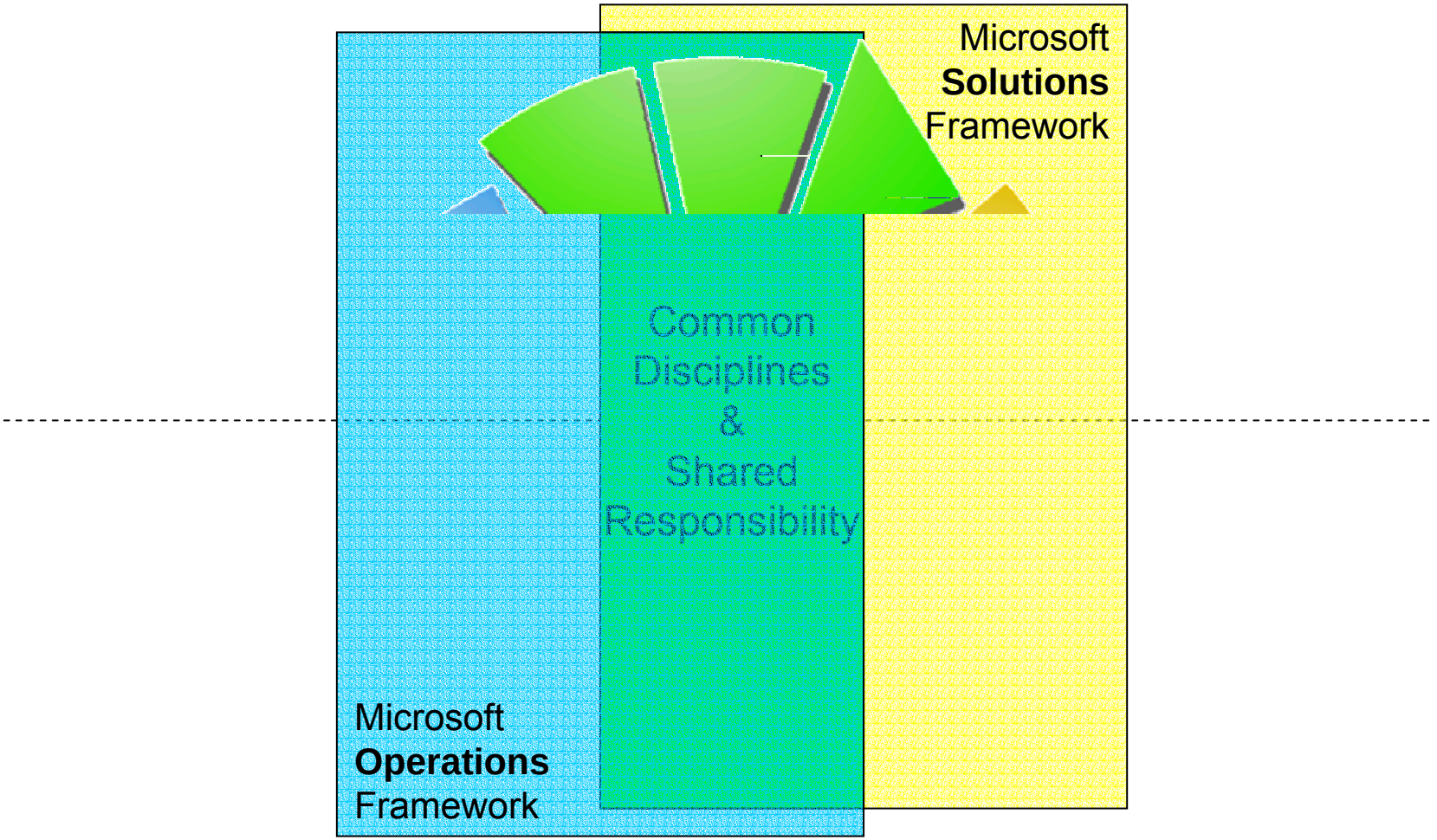
Best Practices

Microsoft® Solutions Framework

25 years of Microsoft experience

MSF evolution: 7+ years

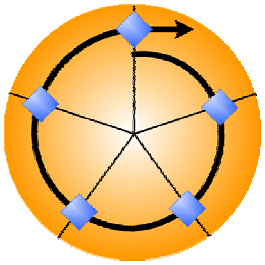
One IT Lifecycle – Multiple Perspectives



MSF Models and Disciplines

Team Model

Process Model



Risk Management Discipline—Increasing the potential for success

Project Management Discipline—Managing and meeting commitments

Readiness Management Discipline—The right skills at the right time

Module 2:
The MSF Team Model

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Team Goals for Success

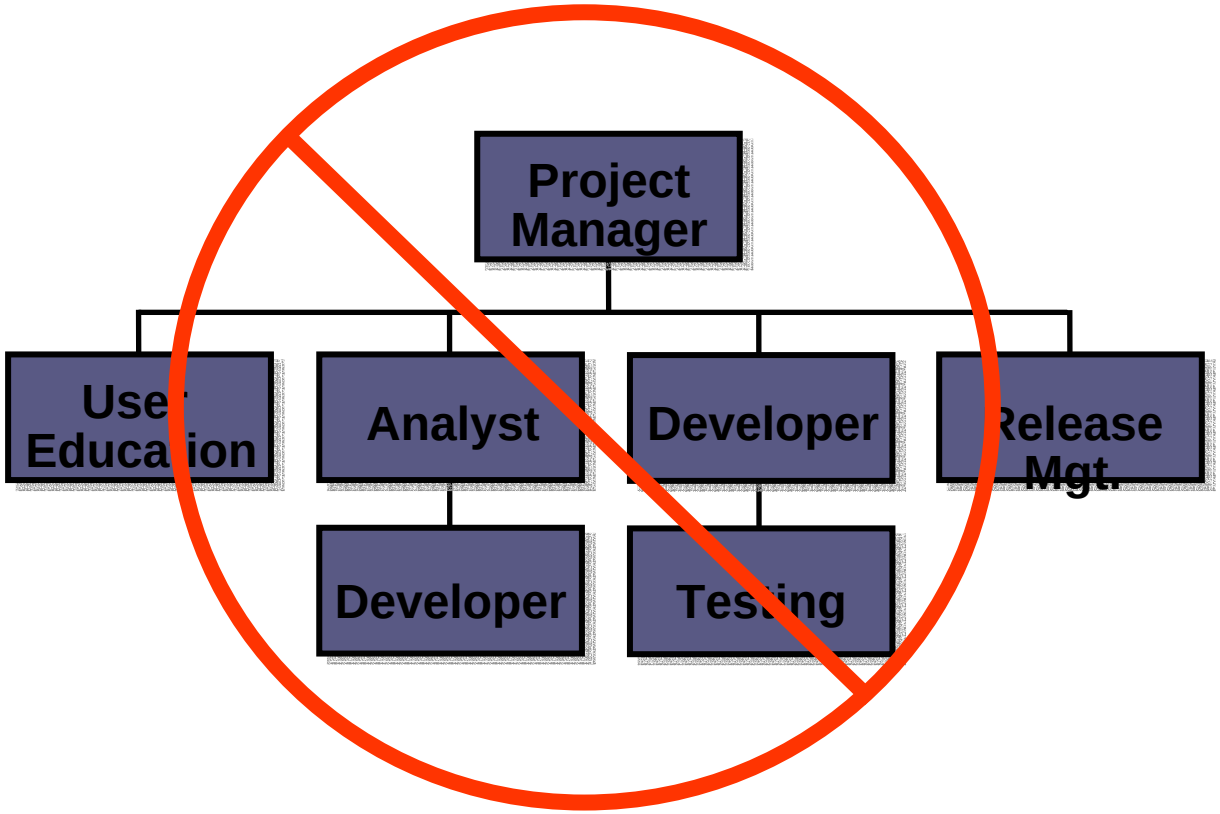
- Satisfied customers
- Delivery within project constraints
- Delivery to specifications that are based on user requirements
- Release after addressing all known issues
- Enhanced user performance
- Smooth deployment and ongoing management

Team of Peers

- Is a team whose members relate as equals
- Has specific roles and responsibilities for each member
- Empowers individuals in their roles
- Holds members accountable for the success of their roles
- Drives consensus-based decision-making
- Gives all team members a stake in the success of the project

MSF Team Model and Role Clusters

Not a Traditional Organizational Chart



Product Management Role Cluster

- Acts as customer advocate to the team
- Acts as team advocate to the customer
- Drives shared project vision
- Manages customer expectations
- Develops, maintains, and executes the business case
- Drives feature identification and prioritization
- Develops, maintains, and executes the communications plan

Program Management Role

- Drives the overall process
- Manages resource allocation
- Manages the project schedule and reports project status
- Manages the product scope and specification
- Facilitates team communication and negotiation
- Drives overall critical trade-off decisions

Development Role

- Builds and tests features to meet the specification and customer expectations
- Participates in design
- Estimates time and effort to complete each feature
- Serves the team as a technology consultant

Testing Role

- Develops testing strategy, plans, and scripts
- Manages the build process
- Conducts tests to accurately determine the status of product development
- Participates in setting the quality bar

User Experience Role

- Acts as team advocate to the end user
- Acts as end-user advocate to the team
- Participates in defining user requirements
- Participates in designing features
- Designs and develops user support systems
- Drives the usability process

Release Management Role

- Acts as team advocate to operations
- Acts as operations advocate to the team
- Plans and manages product deployment
- Participates in design, focusing on manageability, supportability, and deployability
- Supports the product during beta testing
- Trains operations and help desk personnel for product release

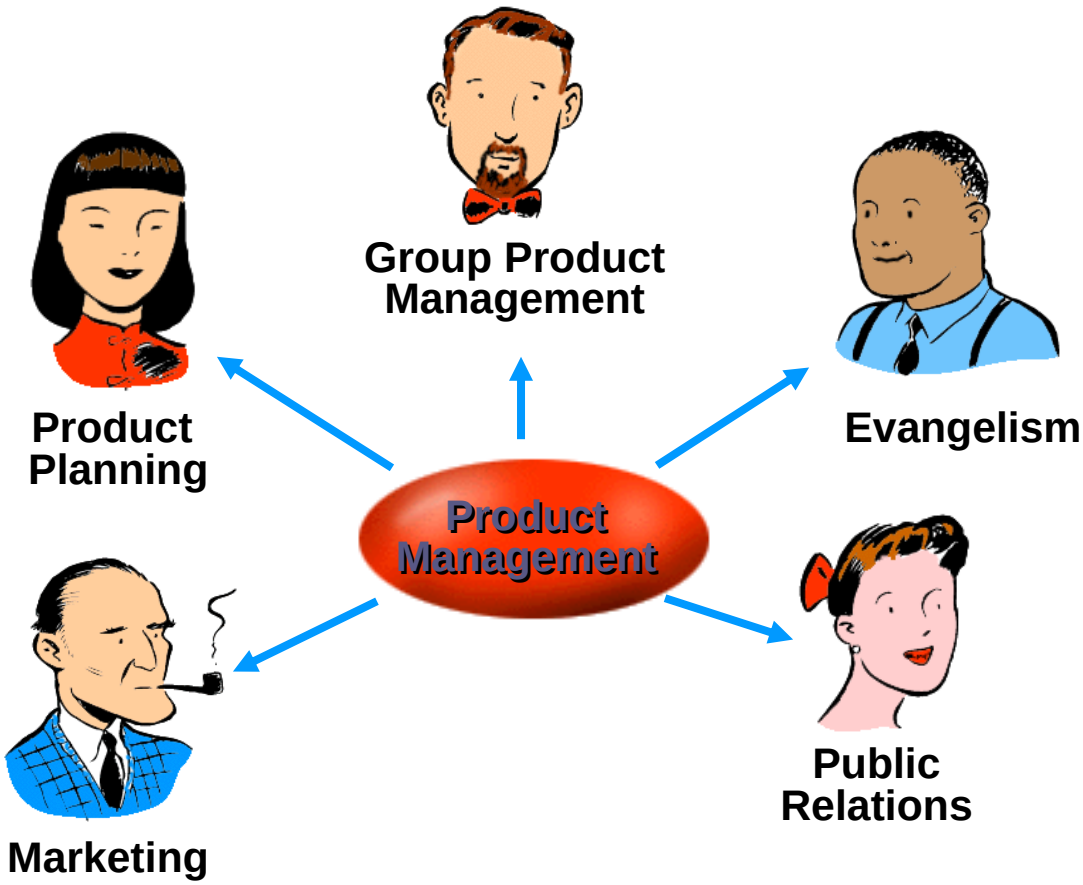
Scaling for Small Projects

	Product Management	Program Management	Development	Testing	User Experience	Release Management
Product Management		N	N	P	P	U
Program Management	N		N	U	U	P
Development	N	N		N	N	N
Testing	P	U	N		P	P
User Experience	P	U	N	P		U
Release Management	U	P	N	P	U	

P Possible **U** Unlikely **N** No

Example: Feature Teams

Example: Function Team



Module 3:
The MSF Process Model

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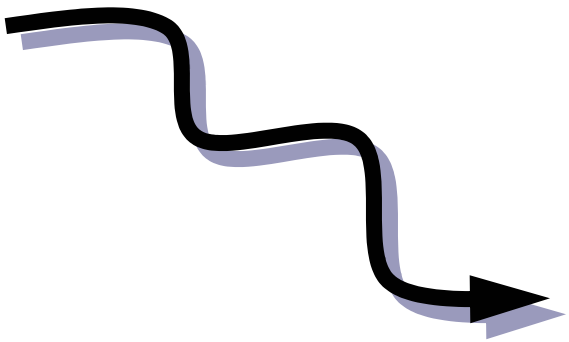
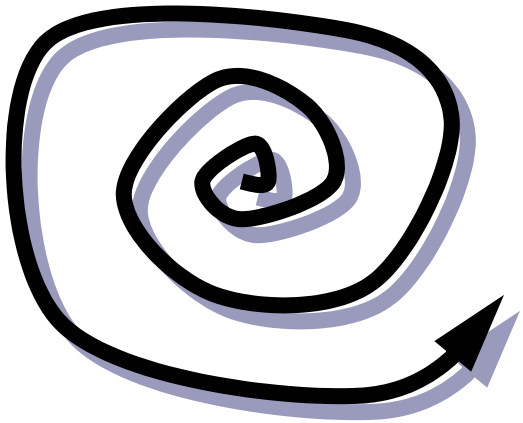
Two Common Process Models

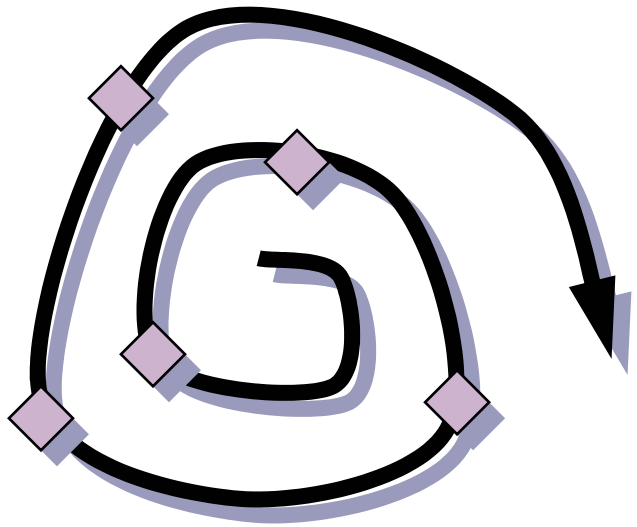
- Process models establish the order for activities within a project lifecycle
- Two process models are popular
  - The waterfall model
  - The spiral (or rapid application development) model





The MSF Process Model

- The MSF Process Model combines the benefits of waterfall and spiral models
  - Milestone-based process
  - Flexible and iterative process



The MSF Process Model

Module 4:
The Envisioning Phase

Vision/Scope Approved Milestone

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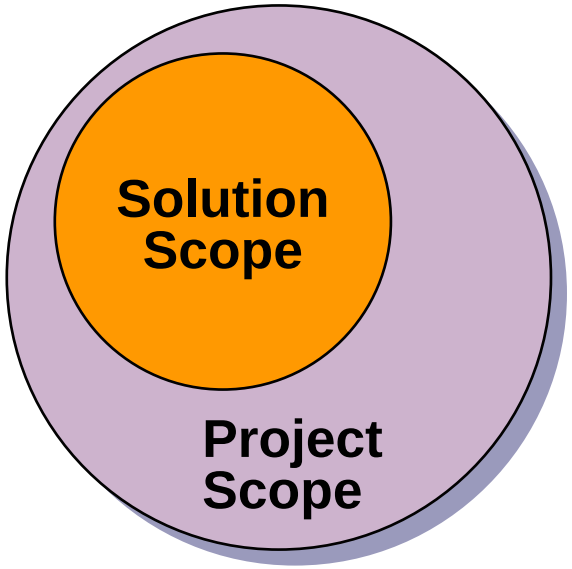
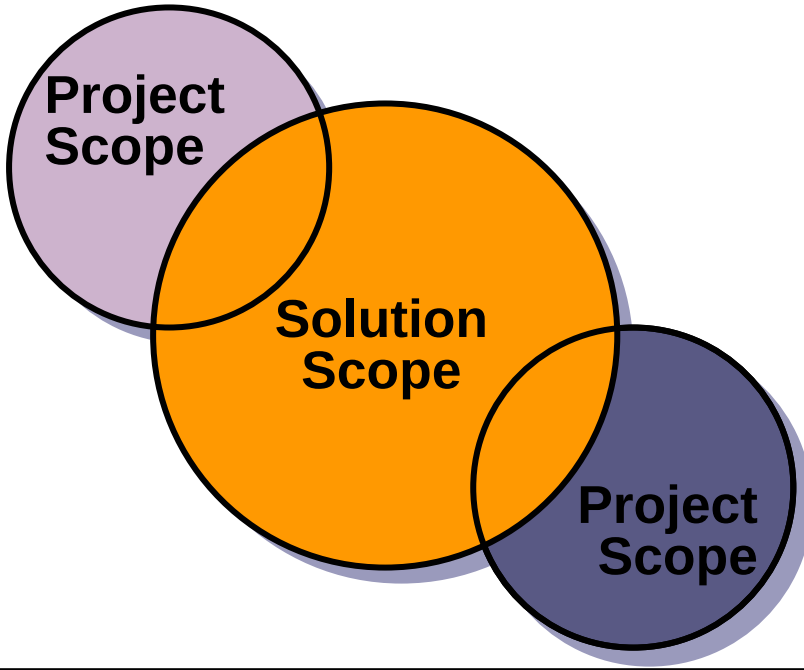
Vision/Scope Components

- Why you want to do project? => Problem Statement
- What you want the solution to be? => Vision Statement
- What you will do to build it? => Solution Concept
- Who will use the solution? => User Profile
- What you want to accomplish? => Business Goals
- How you plan to accomplish it? => Design Goals

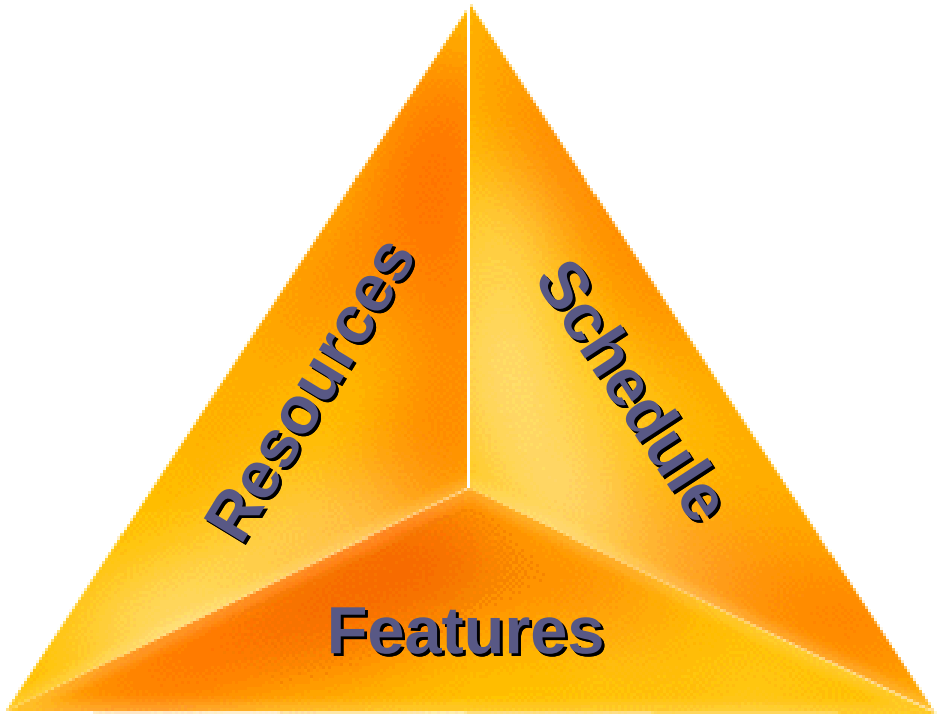
Define Scope

- Solution Scope: The full set of features and deliverables included in the solution
- Project Scope: The work performed by the team to deliver each item in the solution scope

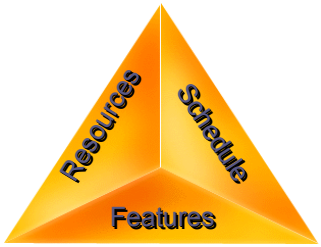




Manage Project Trade-Offs



Project Trade-off Matrix



	Fixed	Chosen	Adjustable
Resources	✓		
Schedule		✓	
Features			✓

Module 5:
The Planning Phase

Project Plan Approved Milestone

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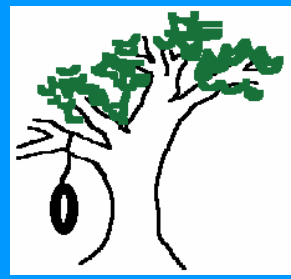
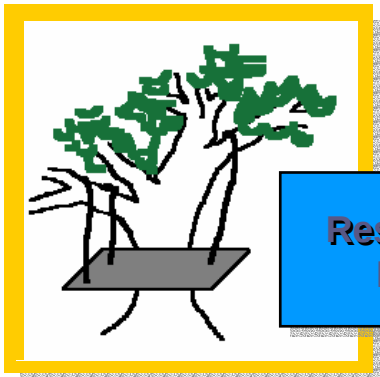
Planning the Solution

What the User Needed

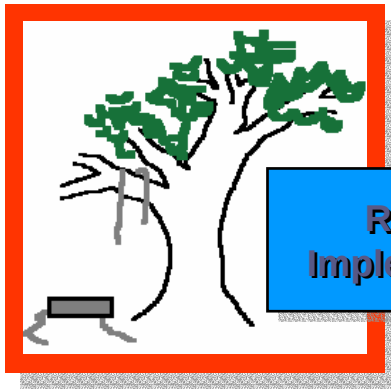
What the User Described and the Analyst Understood



What Could Have Been Sufficient

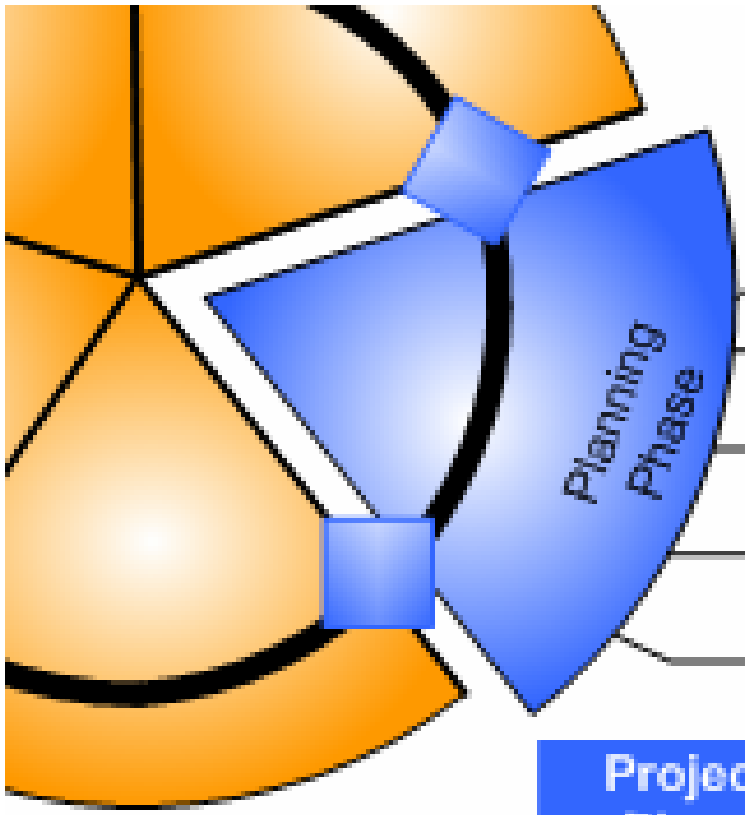


Result of the Design



Result of Implementation

Suggested Interim Milestones



Vision/ Scope Approved

Technology Validation Complete

Functional Specification Baselined

Master Project Plan Baselined

Master Project Schedule Baselined

Development/Test Environment Set Up

Project Plans Approved

Module 6:
The Developing Phase

Scope Complete Milestone

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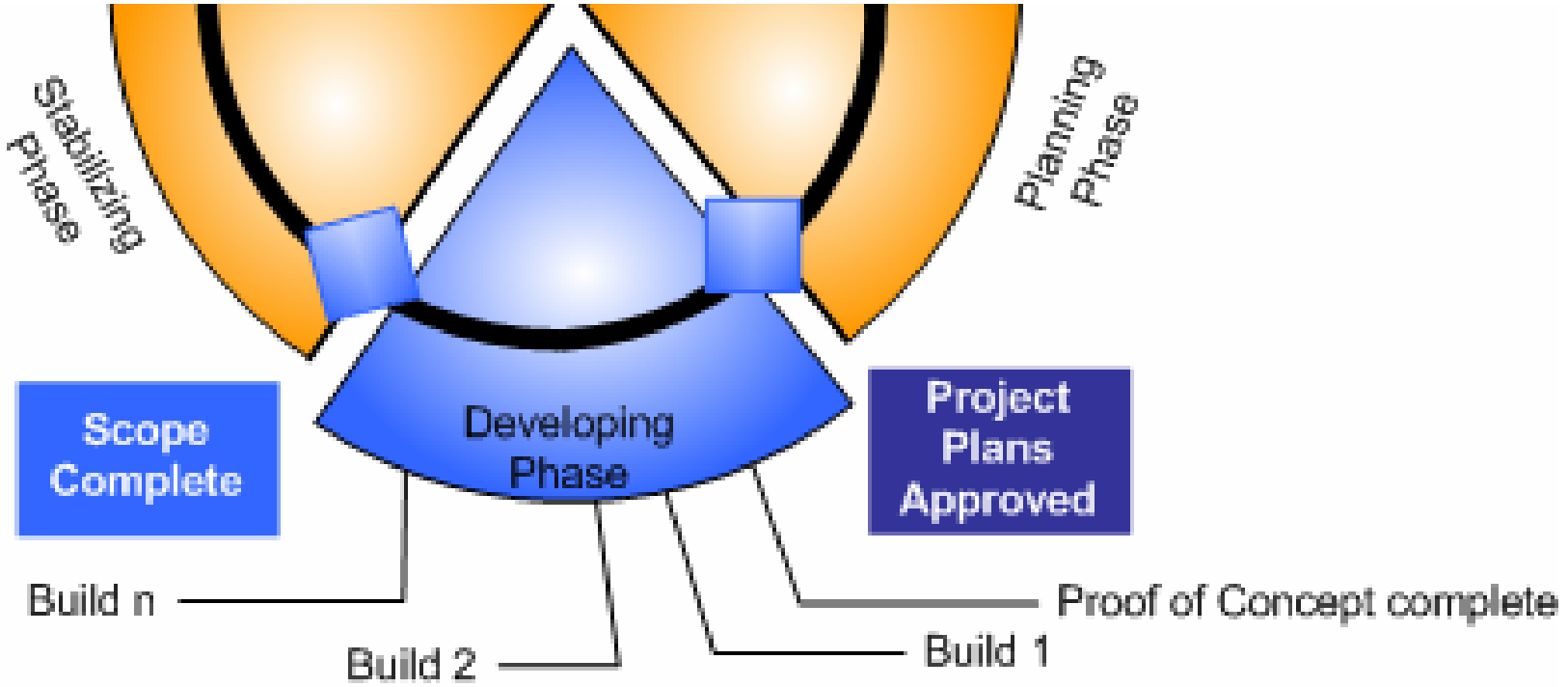
Creating Living Documents

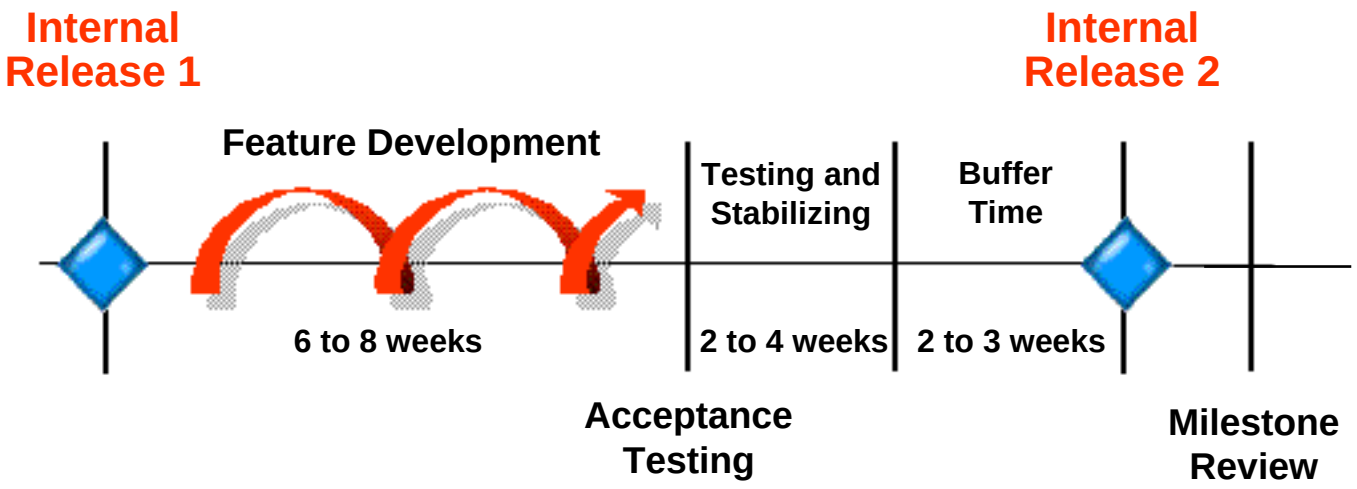
- What it means
  - Baselining documents as early as possible
  - Freezing documents as late as possible
- Why it is important
  - Avoids “analysis paralysis”
  - Establishes a structured change control process

Suggested Interim Milestones



Internal Releases

Getting the product to a known state and incrementally building upon it



Zero-Defect Mindset

Committing to the highest possible level of quality within project constraints

- Team members must understand the required quality level for their work
- Work is not complete until it reaches that level of quality
- The zero-defect mindset is embodied in
  - Task deliverables
  - Milestones

Daily Build

Building the product in an shippable form on a daily basis

A public daily build is

- A strong indicator that a team is functional
- A way to make the product and its progress visible
- The heartbeat of the development process

Module 7:
The Stabilizing Phase

Release Milestone

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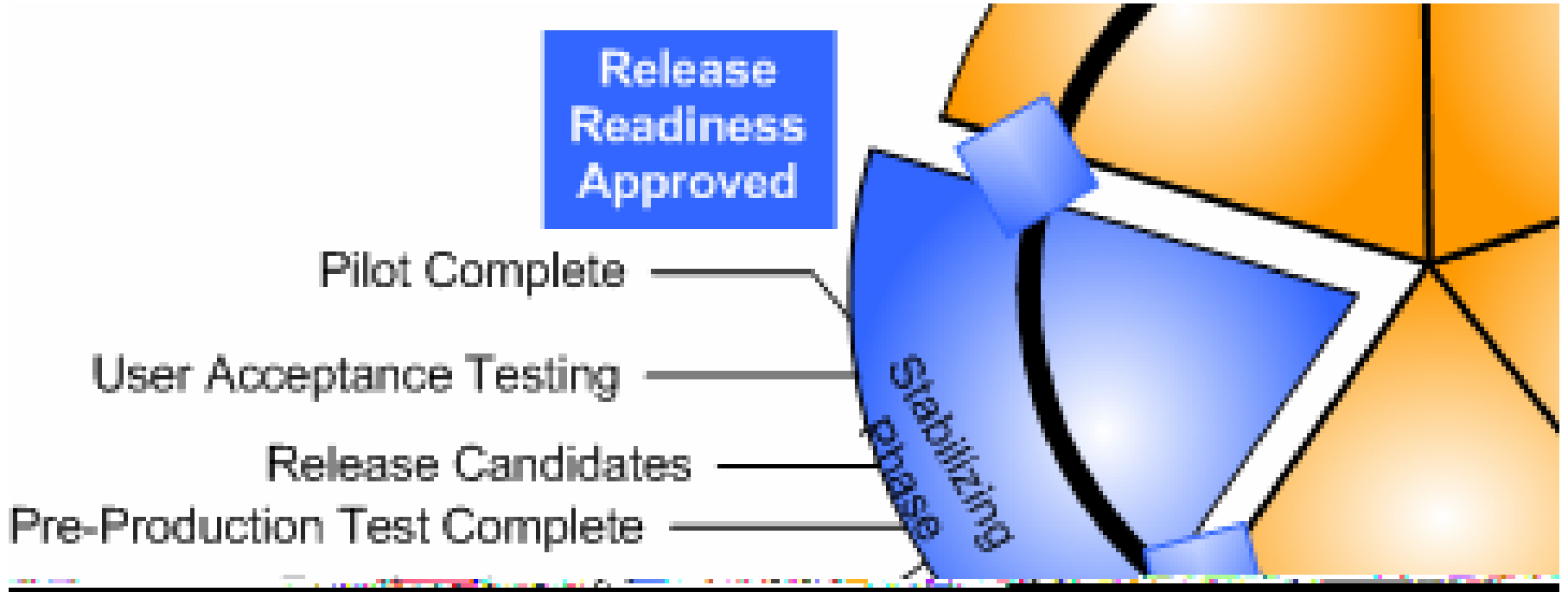
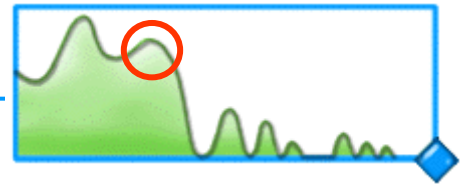
Suggested Interim Milestones



Bug Convergence



Marking the point at which the rate of bugs fixed exceeds the rate of bugs found

- Indicates that the solution is becoming stable
- May be difficult to recognize due to variations in bug counts
- Defines a trend rather than a specific date

Zero-Bug Release

Reaching the first release to testing after all active bugs have been resolved

- Requires a heightened bug-triaging process
- Clearly marks the beginning of the endgame
- Is the moment when development catches up to testing
- Is the process of reaching zero bugs and then working to stay there

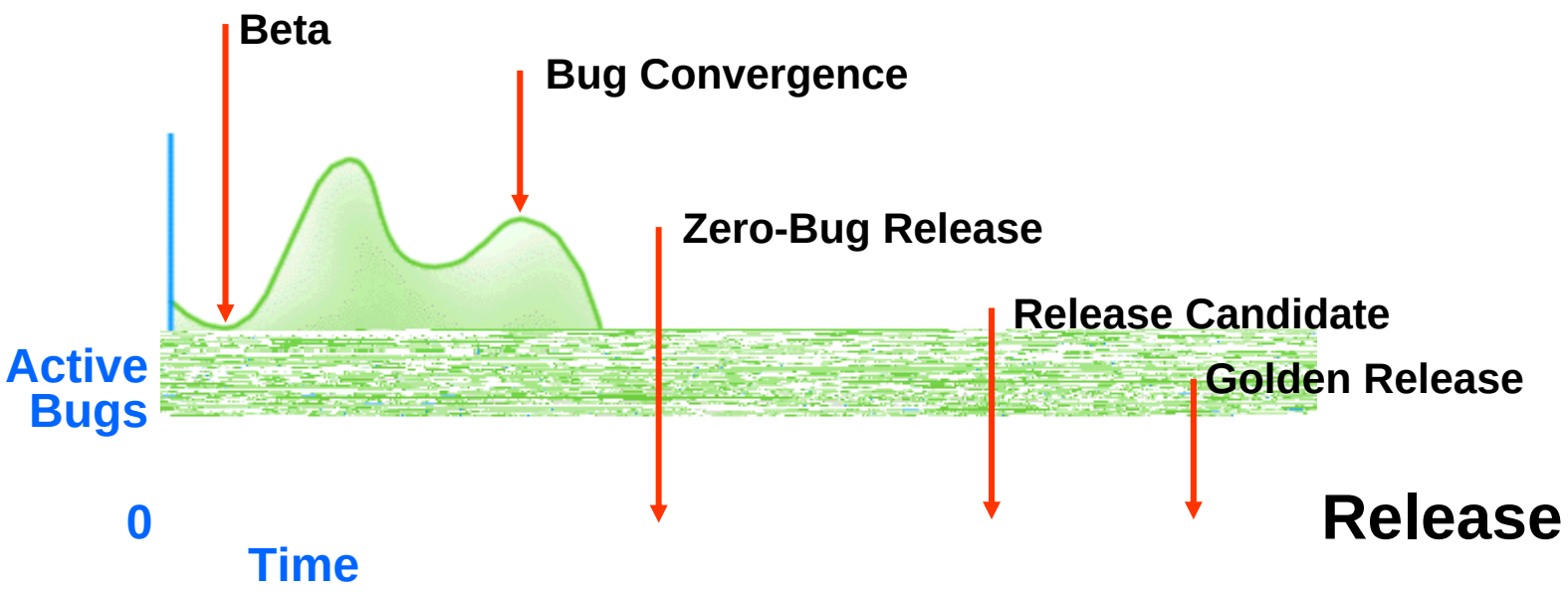
Endgame

Driving the product to a releasable state

- Represents the closing moves for the project
- Begins with the effort to reach the zero-bug release
- Forces bug management into a much more focused triaging process
- Is the point in the project where shipping takes precedence over everything else

Fixed-Ship Date Mindset

Focus on Shipping



Module 8:
The Deploying Phase

Deployment Complete Milestone

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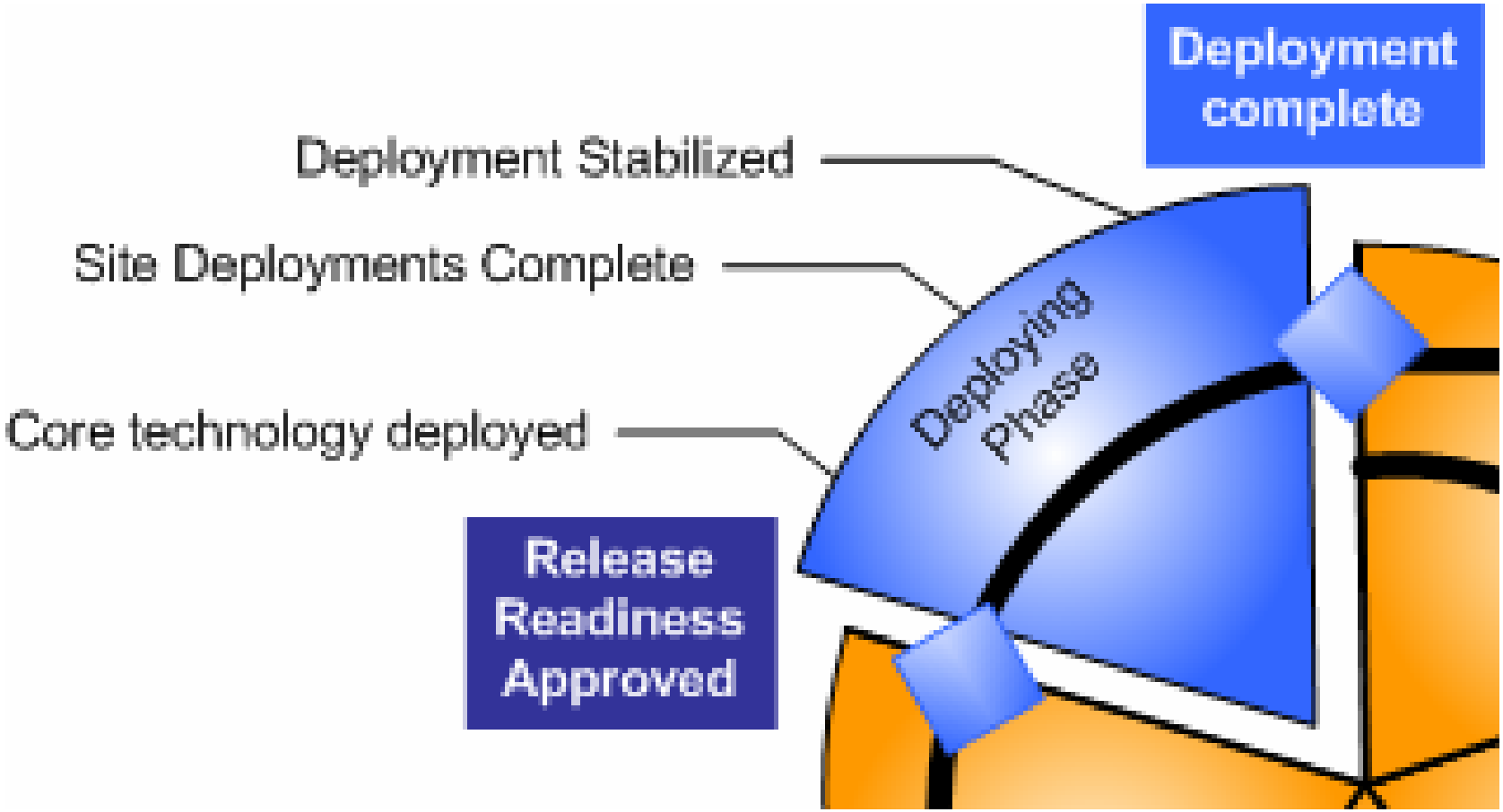
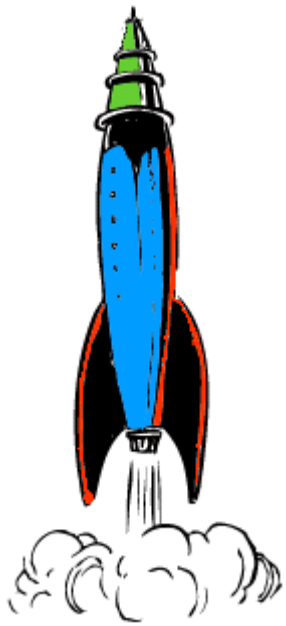
Suggested Interim Milestones



Site Deployments Complete Interim Milestone

- Access to the solution by all targeted users
- Possible revisit of some sites based on feedback from site satisfaction surveys
- Start of a concentrated effort to finish stabilization and close out the project



Deliverables for the Deploying Phase

Deliverables

- Operation and support information systems
  - Procedures and processes
  - Knowledge base, reports, logbooks
- Repository for all versions of:
  - Documentation (architecture diagrams, etc.)
  - Code developed during the project
  - Project close-out report
    - Final versions of all project documents
    - Customer/user satisfaction data
    - Definition of next steps

Module 9:
MSF Disciplines

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MSF Disciplines

- **Risk Management Discipline**—Increasing the potential for success
- **Readiness Management Discipline**—The right skills at the right time
- **Project Management Discipline**—Managing and meeting commitments

Module 3

Managing Project Risks

Risk Defined

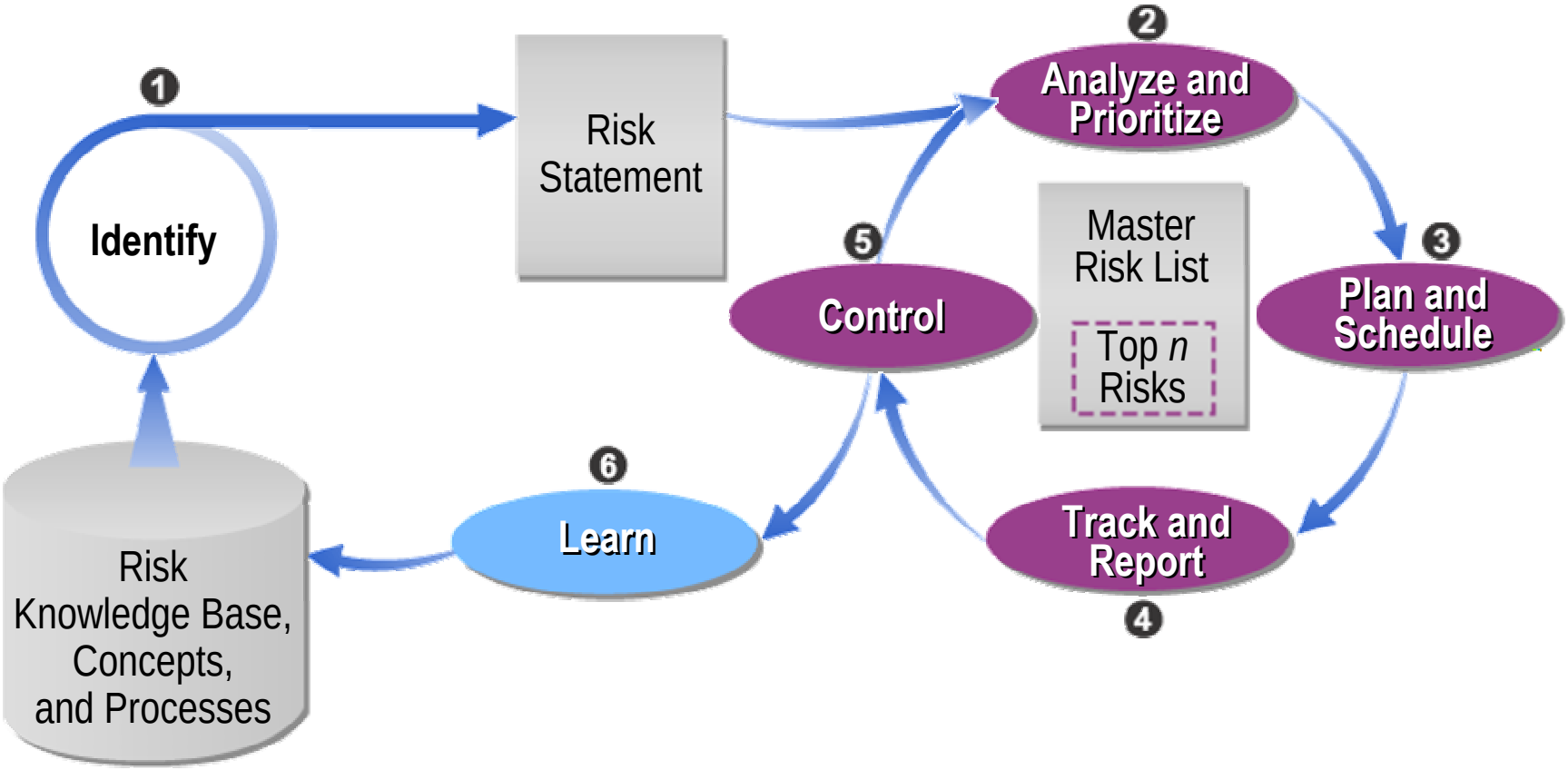
The greatest risk is not taking one!

- Definitions
  - Dictionary: “Possibility of loss or injury”
    Webster’s Collegiate Dictionary, 10th edition
  - Common: A problem waiting to happen
  - Any event or condition that can cause an unplanned impact or outcome of a project
- Characteristics
  - Inherent in every project
  - Neither intrinsically good nor bad
  - Not something to fear, but something to manage

Risk Management in MSF

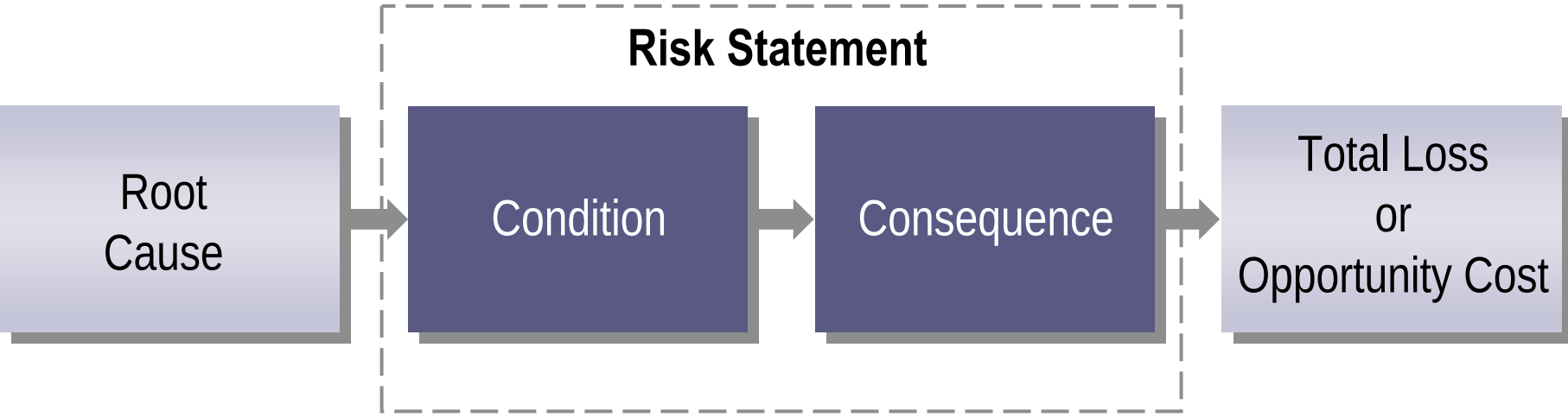
- **Project Risk** – The possibility of a negative outcome that is assumed in order to pursue an opportunity for gain in the project
- MSF risk management discipline
  - Distinguishes risks from issues or problems that exist **already** (“known problems”)
  - Defines a risk management process for proactively identifying, analyzing, and addressing risks
  - Increases the likelihood of success in a project by minimizing the potential for failure

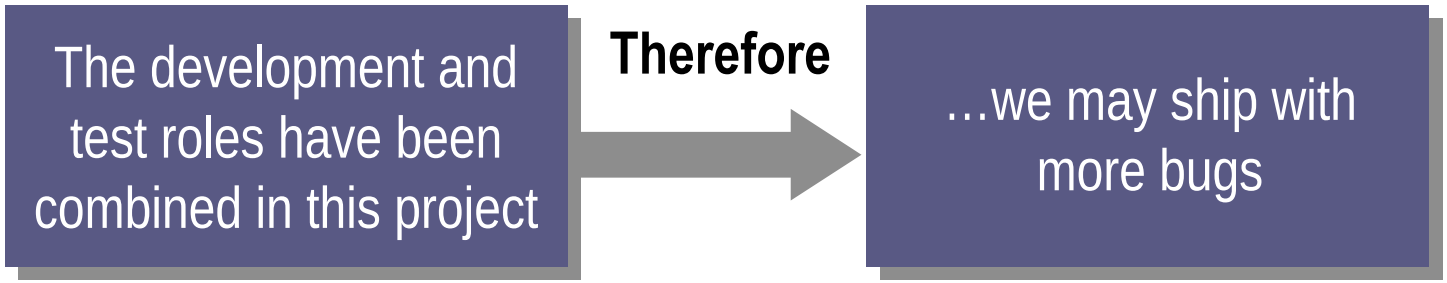
The MSF Risk Management Process



Creating Risk Statements

Risks must be clearly stated





Module Summary

MSF risk management is:

- Comprehensive – It addresses all of the elements in a project (people, process, and technology elements)
- Systematic – It incorporates a six-step, reproducible process for project risk management
- Continuous – It is applied throughout the project life cycle
- Proactive – It seeks to prevent or lessen impact of risk occurrences
- Flexible – It can accommodate a wide range of quantitative and qualitative risk analysis methodologies.
- Future-oriented – It is committed to individual and enterprise level learning

Lesson 3: The MSF Readiness Discipline

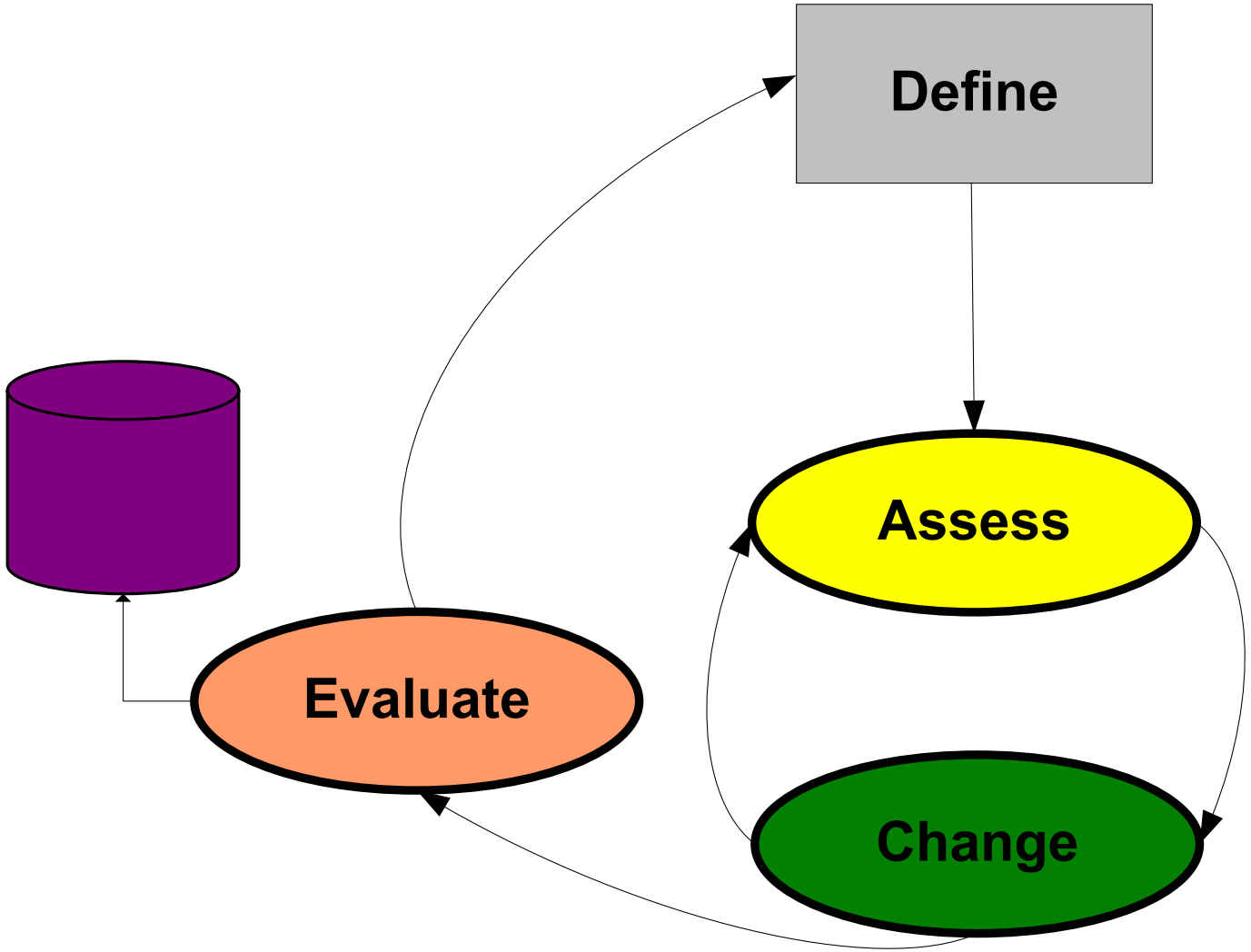
MSF: Readiness Defined

- **Readiness**—Current versus desired state of knowledge, skills and abilities of individuals in an organization
- **Individual readiness**—Current state of individual knowledge, skills and abilities versus that needed for project role
- **Organizational readiness**—Current state of collective degree of readiness used in both strategic planning and in evaluating capability to achieve successful adoption and realization of a technology investment

Readiness Discipline Scope

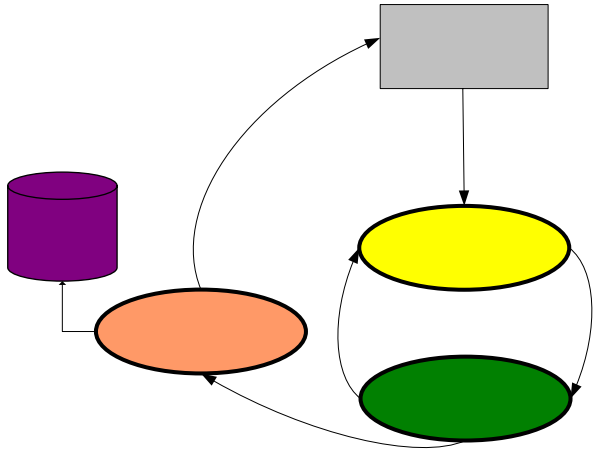
- Focuses on the areas of *knowledge*, *skills,* and *abilities* for the individual, solution and enterprise architecture levels—*not* organizational readiness

Readiness Management Process



Readiness Management Tasks

- **Define**:
  - Scenarios
  - Competencies
  - Proficiencies
- **Assess**:
  - Measure knowledge, skills, abilities
  - Analyze gaps
  - Create learning plans
- **Change**:
  - Train
  - Track progress
- **Evaluate**:
  - Review results
  - Manage knowledge

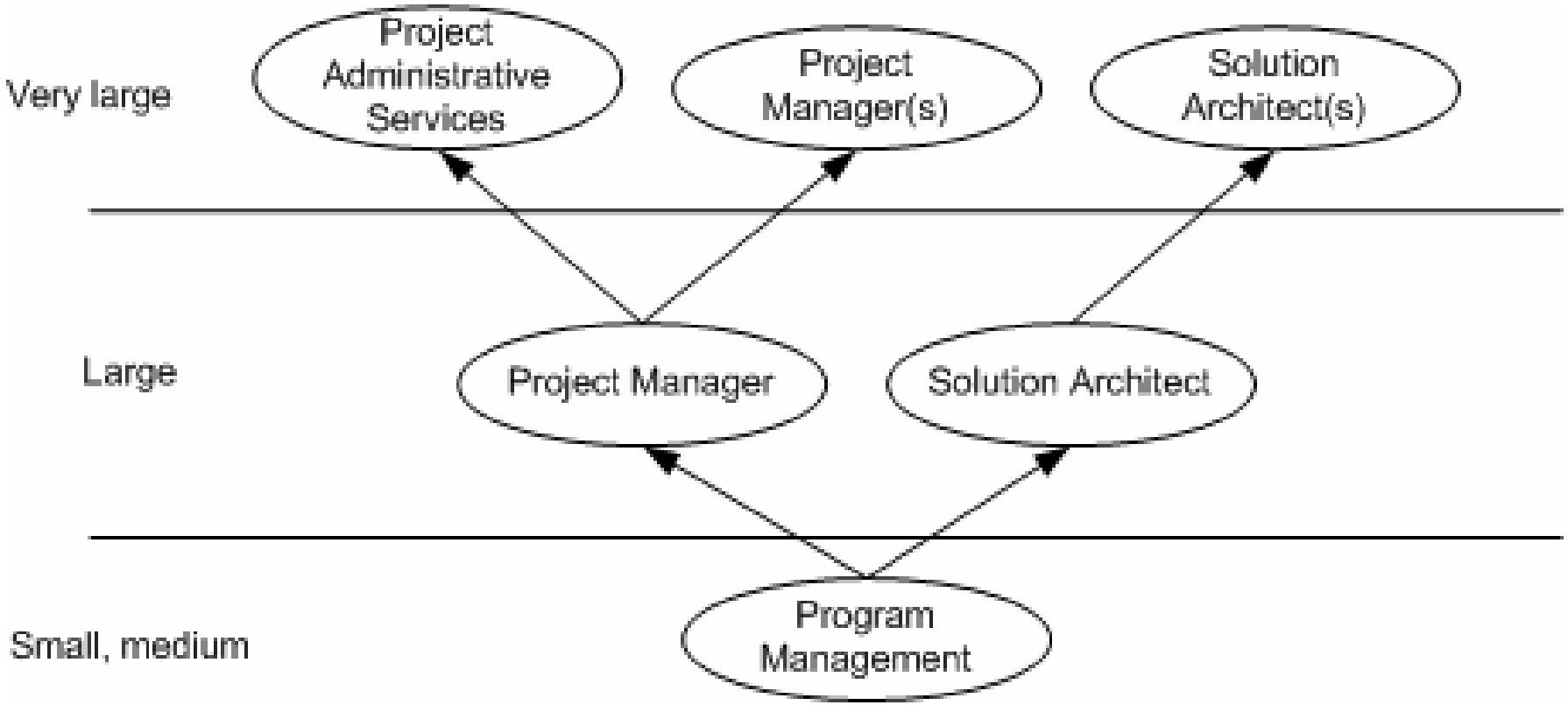


Lesson 4: The MSF Project Management Discipline

Microsoft Project Management

- Project Management is a service
  - Provides assistance vs. control
  - Risk-driven scheduling
- All team members can and must contribute
  - Bottom-up estimation
  - Motivated teams are more effective
- Half-complete tasks are not enough
  - Get something *done* every week
  - Don’t “go dark”
- Avoid bureaucracy—stay lean and agile
  - Every process and deliverable has a purpose

Specialization of Program Management Role Cluster



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- Further Information
  - http://www.modulo3.de
  - http://www.Microsoft.com/MSF
- Q&A
  - Ihre Fragen (soweit noch nicht gestellt ;)