



F E D E R A L
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Solution Life Cycle

Configuration Management Deployment Module

As of March 7, 2002

Version 1.0



Revision History

All revisions made to this document are listed here in chronological order.

Version Number	Date Modified	Author Name	Description



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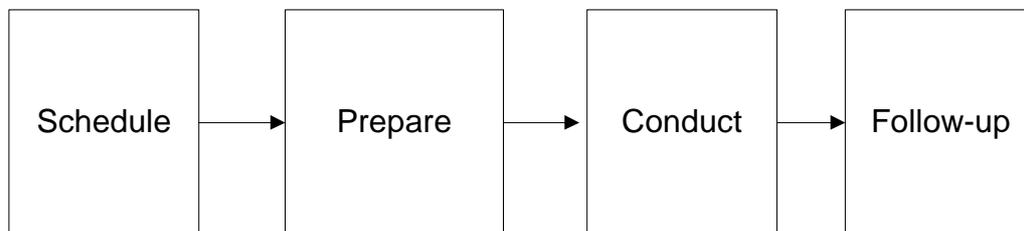
Section 1 Introduction to Solution Life Cycle Configuration Management Deployment

Solution Life Cycle (SLC) Configuration Management (CM) Deployment builds on the FSA investments made recently in the development and deployment of the SLC CM Process Guide. The purpose of CM Deployment is to build awareness, understanding and buy-in of the need to conduct CM activities at the project level in accordance with the guidelines set forth in the CM Process Guide.

CM Deployment supports the Modernization project teams to optimize the planning and performance of CM activities. To accomplish these objectives, the CM Deployment team developed coaching session/peer review guidelines, content, and job aids, which are contained in the CM Deployment Module and deployed them to selected Modernization projects.

The process used by the SLC CM Deployment team as a guide to the coaching/peer review effort is in draft form and is under development as part of Task Order 90. A summary is included below:

Coaching Session/Peer Review Process Summary



The results of the CM Deployment effort and recommendations for future refinement of the CM Deployment Module are reported in the CM Deployment Status Report.

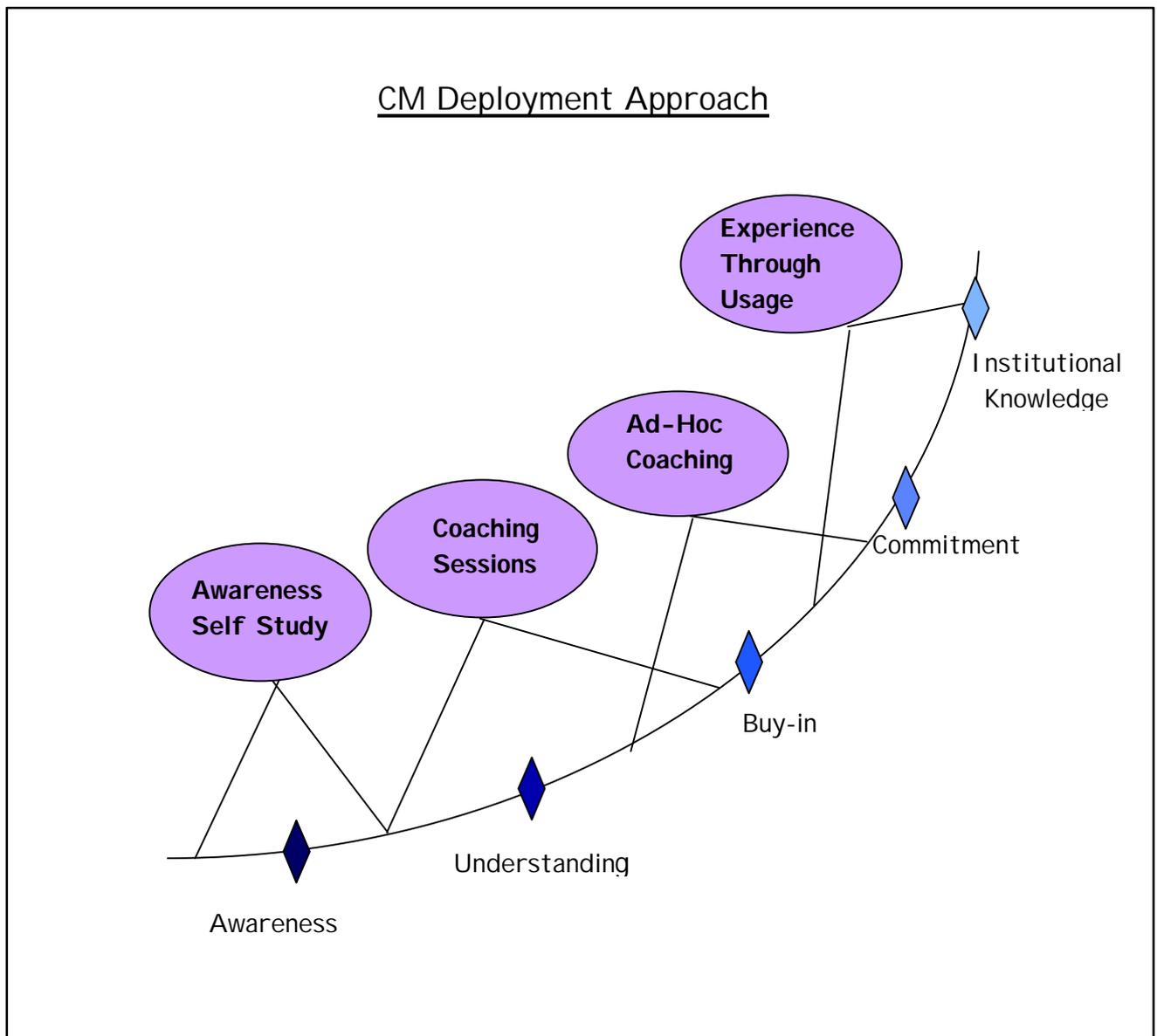


Section 2 Project CM Deployment Overview

The CM Deployment Module is intended to serve as a job aid - handbook. Its purpose is to assist in providing coaching support to the Modernization Projects in their efforts to plan and perform Configuration Management according to the guidelines established by the SLC.

The target audience of this module consists of those resources who assume a project CM coaching role, for example, an experienced CM Lead who mentors a newly appointed CM Lead from another project.

The CM deployment approach enables the achievement of the differing levels of awareness, understanding, and buy-in to the SLC, as shown in the diagram below.





Configuration Management Deployment Module

The three components of the CM Deployment effort map to the first three levels of CM Deployment Approach diagram (shown on the previous page) are:

- Awareness (Self-Study):

Description: Self-paced learning is delivered through materials that can be accessed electronically, or in printed copy. The centerpiece of this component is the updated version of the CM process guide including CM templates and sample CM work products.

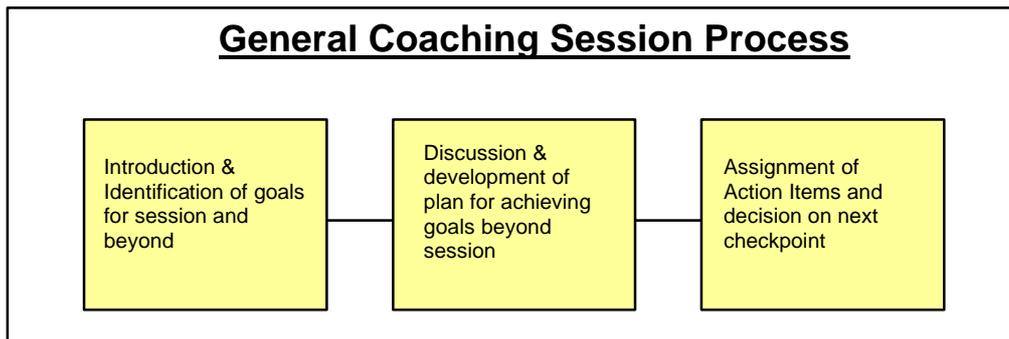


Reference: See Attachment C of this module – CM Deployment Coaching Session Agenda – Self - Study Document List, for a complete listing of the Self-Study materials.



- Coaching Sessions:

Description: The CM coaches provide point-of-need support to selected projects, meeting with the project CM Lead and the Project Manager. CM coaches can tailor the CM Deployment Coaching Session Agenda Template to the needs of the project, taking into account the size, complexity and nature of the project (i.e. whether software development or not). CM coaches use the CM Orientation Presentation to introduce CM.



Reference: See Attachment C of this module – CM Deployment Coaching Session Agenda Appendix A of the SLC CM Deployment Status Report, for report summaries of Coaching Session meetings with projects.

- Follow-up/Ad-hoc Coaching:

Description: The CM Deployment team conducts coaching/peer review sessions to assist in the development and facilitation of the CM effort. This assistance is tailored to individual projects on an as-needed basis.

Examples of Follow-up /Ad-Hoc Coaching Areas of Assistance:

- Creating the CM Plan
- Coordinating Code Version Control Tool Implementation
- Organizing the File Repository/ CM Library in eProject
- Developing Team CM strategies and implementation tactics
- Assessing progress

Reference: See the SLC CM Deployment Status Report, Section entitled CM Deployment Results Achieved to Date, for an overview of Follow-up and Ad-hoc Coaching provided).



Section 3 Guidelines for Scheduling Project CM Deployment Coaching Sessions

Plan ahead for success by preparing and coordinating appropriate communications to prospective meeting participants.

Minimum number of business days before meeting	Action
7	Introduce CM Deployment effort to Mod Partner Project Manager & CM Lead
5	Arrange date, time & location of meeting
5	Send e-mail invitation with confirmation of meeting arrangements to Mod Partner Project Manager
5	Send e-mail message to FSA Project Lead with copies to affected parties.
2	Tailor meeting agenda to project CM needs
2	Send meeting agenda and reconfirmation of meeting arrangements to participants



Section 4 Frequency and Nature of Project CM Deployment Coaching Sessions

Normally the Project Manager and/or CM Lead and others identified by the Project Manager meet with the CM Deployment Team approximately three times for projects that develop software and two times for non-software development projects. The CM Deployment team concentrates its efforts on supporting the optimization and performance of CM activities in those software development (code-writing) projects in the Vision and Definition phases. The coaching sessions add greater value to those projects that are in the early stages of the SLC. The timing and scope of each meeting with project staff will be based on the individual project's needs, and how best to assist the CM Team in its CM efforts.

The purpose of the initial coaching session will be to understand and establish the present status of CM on the project. This first meeting will set a baseline from which to measure future CM performance and improvement. We anticipate that the coaching sessions will last approximately one hour.

Section 5 Coordination with Other Initiatives

- The CM Deployment team met with FSA Quality Assurance (QA) team to review the activities of our respective groups and to coordinate suitable tie-ins on an on-going basis between the CM Deployment Coaching Sessions and QA Reviews.
- The CM Deployment team integrated its approach with the Accenture Quality Process Improvement (QPI) program. QPI already works with several FSA Modernization projects to promote compliance with the Capability Maturity Model of which Configuration Management is an important component. This integration allowed the projects to better prepare for the QPI reviews and thus avoid wasteful and redundant efforts.



Attachment A

CM Deployment Communication Template #1 Invitation to Modernization Partner Project Manager

<Name of Project Manager>

The CM Deployment team mission is to assist you in the optimization of your project's Configuration Management (CM) efforts. Taking an integrated and tailored approach, we provide coaching support and peer review, based on your project's individual needs.

CM Deployment builds on the FSA investments made recently in the development and deployment of the SLC CM Process Guide. CM Deployment involves CM at the individual Modernization Partner project level.

We will follow up with you to make arrangements for your project's initial meeting the week of <DATE> with the CM Deployment team. Please inform us of your meeting preference that week. In addition to your CM Lead, we request that you be present, if possible, at this first one-hour meeting.

We anticipate that, depending on your project's needs, an average of two follow-up sessions will be worthwhile. In addition to the FSA Quality Assurance, we are working to coordinate CM efforts with Quality Process Improvement (QPI), when applicable, so as to maximize the value of the time your project dedicates to CM.

In terms of communication, once we have arranged initial session, please indicate the name of the FSA Project Lead or other representative you believe is most indicated for us to invite to this session.

Thank you.

<FSA PROJECT LEAD NAME>,

CM Deployment, working with FSA CIO, builds on the FSA investments made recently in the development and deployment of the Solution Life Cycle (SLC) Configuration Management (CM) Process Guide. Its objective is to optimize the performance of CM activities at the Modernization Project level.

To accomplish this goal, we meet with your CM Lead and/or Project Manager. The purpose of the initial meeting is to determine how we can best coach the project to perform CM activities. We envision follow-up coaching sessions based on your project's CM needs. Our approach includes tie-ins between the CM Deployment effort and FSA Quality Assurance reviews.

The initial meeting has been arranged for <TIME>, <DATE> in Conference Room <#>. We invite you to attend. Please let us know whether or not you plan to be present.

Thank you.

Attachment A is available electronically by double clicking on the icon below.



"CM Deployment
Communication Temp



Attachment B

CM Deployment Communication Template #2 Invitation to FSA Project Lead

<FSA PROJECT LEAD NAME>,

CM Deployment, working with FSA CIO, builds on the FSA investments made recently in the development and deployment of the Solution Life Cycle (SLC) Configuration Management (CM) Process Guide. Its objective is to optimize the performance of CM activities at the Modernization Project level.

To accomplish this goal, we meet with your CM Lead and/or Project Manager. The purpose of the initial meeting is to determine how we can best coach the project to perform CM activities. We envision follow-up coaching sessions based on your project's CM needs. Our approach includes tie-ins between the CM Deployment effort and FSA Quality Assurance reviews.

The initial meeting has been arranged for <TIME>, <DATE> in Conference Room <#>. We invite you to attend. Please let us know whether or not you plan to be present.

Thank you.

Attachment B is available electronically by double clicking on the icon below.



"CM Deployment
Communication Tem



Attachment C

Session#: <Sequential Session #>-<TO#>-<Session Type> <e.g. 2-70-B>
Project: <Project Name> TO<#>
Date: <Month, date, YYYY>
Time: <Time> AM or PM
Location: Conference Room #< >, <Location>

1. Introduction of Attendees - Opening Remarks – What is CM Deployment?
Question: What is the Mission of CM Deployment at the Modernization Project Level?
Answer: Provide Coaching Support For Configuration Management (CM) Activities
2. Goals of this Session
 - <Session type A (Initial Session) - Enable Project CM Lead to begin CM Planning>
 - < Session type B (Second Session) Determine status of CM on Project, facilitate project CM activities >
 - <Session Type C (Third Session) Determine progress on action items from last review, determine status of CM on Project, facilitate CM activities>
3. Configuration Management Deployment Orientation Presentation (Power-point slide)
4. Overview of SLC Project CM Process Guide <First Session only>
5. Review of Tie-ins with Other Initiatives <First Session only>
 - FSA Quality Assurance
 - ECMI Enterprise Level CM – change management issues that affect other projects
 - Accenture’s Quality Process Improvement (QPI)
6. First Steps to CM Planning <First Session only> (See below)
7. Questions and Answers
8. Action Items



Configuration Management Deployment Coaching Session Agenda <Template>

9. Coaching Session and Self-Study Print Document Distribution List

These documents are used as the basis for the first coaching session, where they are distributed in hard copy, as well as for Awareness/Self-Study.

Document Name	Electronic Location
Session Agenda	Sent by e-mail
First Steps to CM Planning	Session Agenda (E-mail)
CM Orientation Presentation	Mod Partner: e-Project/Knowledge Library/Documents/SLC Tools FSA: TBD
CM Process Guide – Updated Draft Version Appendices included: - CM Plan Template - Configuration Item Index Template - CM Audit Checklist Template - Estimating Guidelines for CM Effort - File Repository Directory Structure Reference - Impact Analysis Worksheet	Mod Partner: e-Project/Knowledge Library/Documents/Planning/07 Configuration Management FSA: TBD
SLC Project CM Peer Review Questionnaire	Mod Partner: e-Project/Knowledge Library/Documents/SLC Tools FSA: TBD

10. Additional Self-Study Reference Document List

These documents provide additional templates and samples for developing the CM plan, the CM Status Reports and Audits. They are available electronically for Self-Study.

Document Name	Electronic Location
SLC Process Guide	Mod Partner: e-Project/Knowledge Library/Documents/SLC Tools FSA: TBD
Configuration Management Plan Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Management Status Report Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Audit Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Management Plan (Sample) – Electronic Audited Financial Statements	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/



Configuration Management Deployment Coaching Session Agenda <Template>

11. CM Contact List

Role	Current Contact Name	Affiliation	E-Mail
CM Deployment Project Support	Robert Morse	Mod Partner	Robert.Morse@Accenture.com
CM Deployment Project Support	Steve Jarboe	Mod Partner	Steven.R.Jarboe@Accenture.com
Q/A Team	Mike Rockis	FSA	Mike.Rockis@ed.gov
Quality Process Improvement	Rondell Milton	Mod Partner	Rondell L. Milton@Accenture.com
Knowledge Library	Nancy Koglin	Mod Partner	Delivery.Excellence@Accenture.com
SLC Deployment	Jen Jones	Mod Partner	Jennifer.E.Jones@Accenture.com
CM Deployment Team Manager	Ron Langkamp	Mod Partner	J.Ronald.Langkamp@Accenture.com
CM Deployment Enterprise Support	Bill Hughes	Mod Partner	Bill.M.Hughes@Accenture.com



First Steps in CM Planning <Use for First Session Only>

1. Identify the CM Lead

2. Begin the CM Plan
 - a. Begin to establish the Project Change Control Group (CCG)

 - b. Identify work products to be placed under CM (Configuration Items)

 - c. Decide what repositories will be used for Configuration Items

 - d. Decide Project standards and procedures for performing CM

Attachment C is available electronically by double clicking on the icon below.



"SLC CM Deployment
Coaching Session Age



Configuration Management Deployment Coaching Session Report <Template>

Attachment D

Session#: <Sequential Session #>-<TO#>-< Session Type> <e.g. 2-70-B>
 Project: <Project Name> TO<#>
 Date: <Month, date, YYYY>
 Time: <Time> AM or PM
 Location: Conference Room #< >, <Location>

1. List of Attendees

Name	Role	Affiliation	E-Mail

2. Goals of the Coaching Session

Goal	Goal Attained?
Enable Project CM Lead to begin CM Planning <Coaching Session A (Initial Session)>	
Determine status of CM on Project < Session B (Second session) & C (Third session)>	
Facilitate project CM activities < Session B (Second session) & C (Third session)>	
Determine progress on action items from last review <Session C (Third session)>,	

3. Questions and Discussion

Questions Posed	Answers Provided

4. Action Items

Item Description	Person Responsible	Completion Date	Comments



Configuration Management Deployment Coaching Session Report <Template>

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CM Process Guide – Updated Draft Version Appendices included: - CM Plan Template - Configuration Item Index Template - CM Audit Checklist Template - Estimating Guidelines for CM Effort - File Repository Directory Structure Reference - Impact Analysis Worksheet	Mod Partner: e-Project/Knowledge Library/Documents/Planning/07 Configuration Management FSA: TBD
SLC Project CM Peer Review Questionnaire	Mod Partner: e-Project/Knowledge Library/Documents/SLC Tools FSA: TBD

6. Additional Self-Study Reference Document List

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Configuration Management Plan Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Management Status Report Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Audit Template-QPI	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/
Configuration Management Plan (Sample) – Electronic Audited Financial Statements	e-Project/Knowledge Library/Documents/Planning/07 Configuration Management/



Configuration Management Deployment Coaching Session Report <Template>

7. CM Contact List

Role	Current Contact Name	Affiliation	E-Mail
CM Deployment Project Support	Robert Morse	Mod Partner	Robert.Morse@Accenture.com
CM Deployment Project Support	Steve Jarboe	Mod Partner	Steven.R.Jarboe@Accenture.com
Q/A Team	Mike Rockis	FSA	Mike.Rockis@ed.gov
Quality Process Improvement	Rondell Milton	Mod Partner	Rondell L. Milton@Accenture.com
Knowledge Library	Nancy Koglin	Mod Partner	Delivery.Excellence@Accenture.com
SLC Deployment	Jen Jones	Mod Partner	Jennifer.E.Jones@Accenture.com
CM Deployment Team Manager	Ron Langkamp	Mod Partner	J.Ronald.Langkamp@Accenture.com
CM Deployment Enterprise Support	Bill Hughes	Mod Partner	Bill.M.Hughes@Accenture.com

Attachment D is available electronically by double clicking on the icon below.



"SLC CM Deployment Coaching Session Rep



Attachment E

Date:

FSA Modernization Project Name:

Please circle (or highlight) the number corresponding to your opinion of different aspects of this peer review session. Use a scale of 1 – 5, with 1 being the poorest rating and 5 being the best. Any comments you have are welcome.

How effective was this coaching session in explaining:

1) Configuration Management (CM) and its benefits?

Least effective **1** **2** **3** **4** **5** Most effective

Comments:

2) How the CM Peer Review team will support your project's CM activities?

Least effective **1** **2** **3** **4** **5** Most effective

Comments:

3) The use of the CM Process Guide and associated CM tools?

Least effective **1** **2** **3** **4** **5** Most effective

Comments:

4) The roles and responsibilities associated with planning and performing CM?

Least effective **1** **2** **3** **4** **5** Most effective

Comments:

Please answer the following questions:

5) Overall, was the material presented in a clear and understandable way?

Least clear **1** **2** **3** **4** **5** Most clear

Comments:

6) Overall, how useful was this peer review session?



CM Deployment Coaching Session Survey <Template>

Least effective **1** **2** **3** **4** **5** Most effective

Comments:

7) How likely will you be to contact the CM team for assistance with your CM activities?

Least likely **1** **2** **3** **4** **5** Most likely

Comments:

8) If you could change anything about the peer review session, what would it be?

9) What did you like best about this session?

10) Other comments:

Attachment E is available electronically by double clicking on the icon below.



"CM Coaching
Session Evaluation St



Attachment F Configuration Management Orientation Presentation

Attachment F appears in print copy on the next page. It is available electronically by double clicking on the icon below.



"SLC CM Deployment
Orientation Presentat



Attachment G SLC CM Deployment Peer Review Questionnaire

Attachment G appears in print copy on the next page. It is available electronically by double clicking on the icon below.



"SLC CM Deployment
Peer Review Questionnaire"