

## **Tri-Borough Business Intelligence Pilot Service Delivery Principles**

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## Introduction

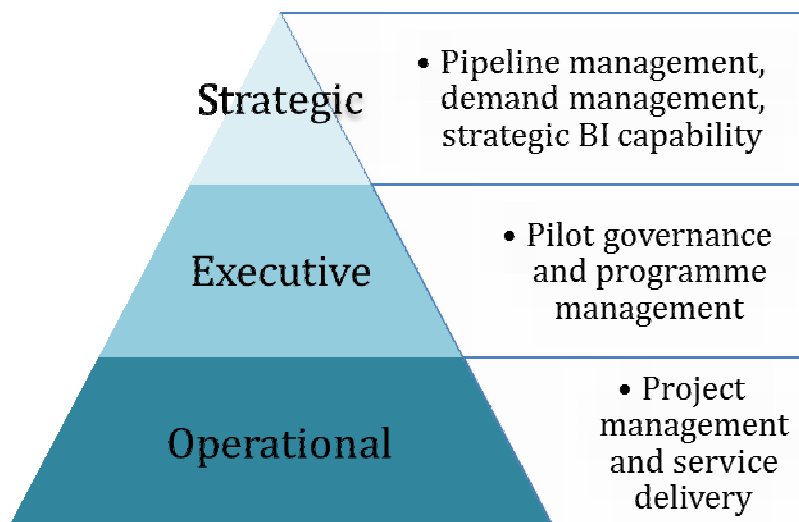
### Context

The Tri-Borough Business Intelligence (BI) Pilot runs via three levels of governance:

The **strategic** function focuses on ensuring the business builds incrementally on project delivery to establish a fully-fledged BI service.

An **executive** function manages and takes accountability for the successful delivery of the Pilot plan and outcomes.

An **operational** function delivers the projects and BI services selected by the strategic function.



### The Service Delivery

**Principles are concerned only with setting out the team roles and responsibilities for the operational function.**

### About the Principles

These agreed principles define working arrangements between the key stakeholders to enable operational service delivery of the BI Pilot. The purpose of these Principles is to provide necessary clarity on responsibilities at the level of detail needed for stakeholders to then assign tasks to roles in their business areas.

The Principles apply to the 'virtual team' assembled for the Pilot that includes a distributed set of stakeholders performing existing relevant roles within the three boroughs including the Tri-borough BI team, Analyst teams, ICM, BDU, Customers and Information Managers.

### Using the Service Delivery Principles

These Principles should be considered 'live' throughout the length of the Pilot and adjusted as necessary as they are 'road tested' to ensure they are fit for purpose.

The RACI table and template process flow should be used as the starting point by the Nominated Project Manager of each selected project as the means to develop the project plan and assign delivery tasks across the virtual team.

It is the responsibility of the Programme Manager of the Pilot to regularly revisit this document and ensure it continues to be fit for purpose.

If disputes or duplication of work occurs, these agreed Principles should be referred to in order to resolve any issues and restore clarity and effective collaboration.

## **Service Delivery Principles**

### **Statements of intent for joint working**

**Successful joint working** - *within the virtual team there is/are:*

- Clear leadership and accountability/ownership lines
- Clarity of roles such that each individual is clear on his/her role, the other roles in the virtual team and how all roles work together
- A seamless 'virtual team' with close collaboration and communication
- A Tri-Borough Business Intelligence Team rather than a Westminster Business Intelligence Team.

**Successful delivery** - *the virtual team is:*

- Clear on the direction of travel with all the virtual team going in one direction
- Working together on clearly defined projects
- Streamlined with no duplication or holdups and clearly defined projects.

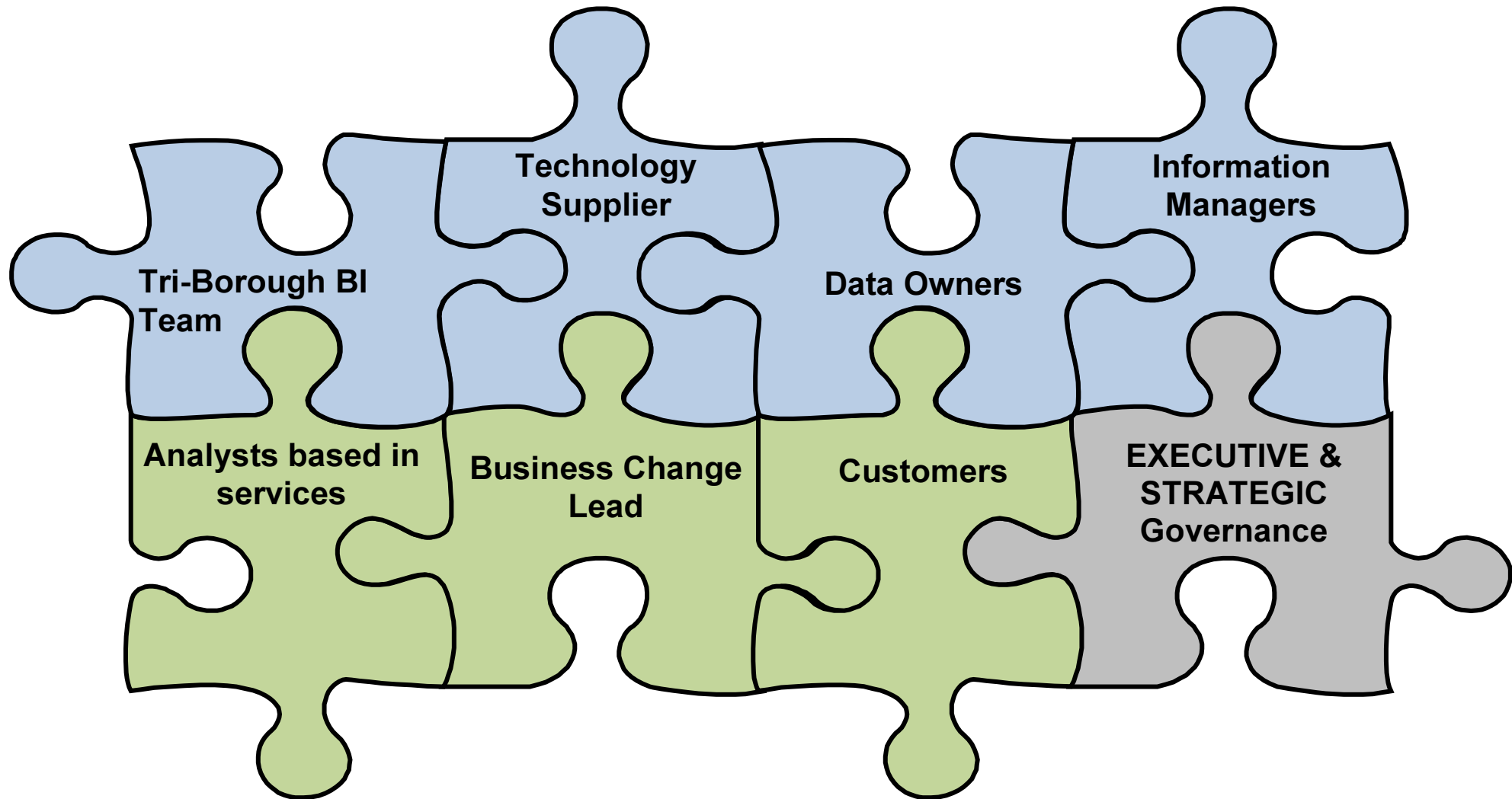
**Demonstrable results** - *the virtual team is:*

- Measuring progress both within the team and within the organisation
- Demonstrating visible and apparent weekly progress
- Doing new and ground-breaking work that is achieving a step-change from where we started.

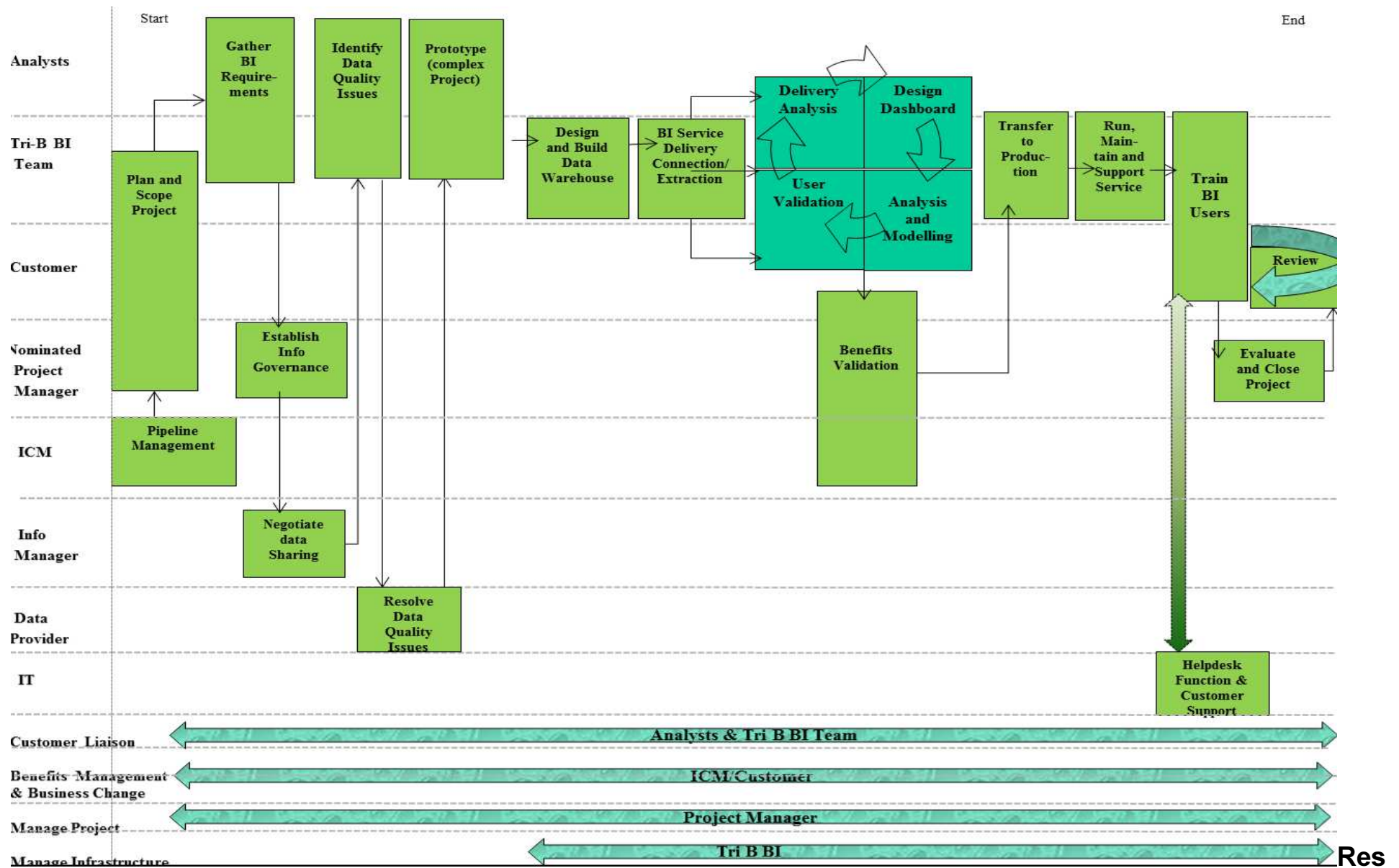
**Satisfied customers** - *the virtual team has 'happy customers' because it is delivering:*

- High quality deliverables that are responsive to customer requirements
- Clearly articulated messages that are improving customer understanding
- Good customer management with a single contact or clear contacts from customer perspective all the way through the service delivery process.

**'Virtual Team' Diagram**



## Process Activity Flow



## Responsibilities for the key activities of service delivery (RACI)

Please refer to SharePoint Excel document for best viewing and use:

<http://partnerweb/corpservices/it/gisbi/BI/BIPilot/layouts/xlviewer.aspx?id=/corpservices/it/gisbi/BI/BIPilot/Project%20Documents/BI%20Pilot%20Service%20Delivery%20Principles%20-%20RASCI%20and%20process%20flow.xlsx>

A = Accountable = owns activity and at fault if activity fails

R= Responsible = Does the work, lead 'doer'

S = Supports = contributes to doing the work and supports the responsible team as needed

C = Consulted = inputs knowledge or expertise as needed into the work without 'doing' any tasks

I = Informed = briefed on activity progress or output

<b>Activities</b>	<b>Nominated Project Manager</b>	<b>Tri-B BI Team (Jo Lodge)</b>	<b>Change Management ICM/BDU (Martin/Tim)</b>	<b>Analysts (Lee/Damian + ICM/BDU Analysts)</b>	<b>Information Managers</b>	<b>Customer</b>	<b>Supplier</b>	<b>Data Provider</b>	<b>IT</b>	<b>Executive function</b>	<b>Strategic function</b>
Plan and scope project after strategic approval	<b>A+R</b>	<b>R</b>	<b>S</b>	<b>S</b>	<b>I</b>	<b>R</b>					
Gather BI requirements	<b>I</b>	<b>A+R</b>	<b>C</b>	<b>S+R</b>		<b>R</b>					
Establish information governance	<b>R</b>		<b>C</b>		<b>C</b>					<b>A</b>	
Negotiate data sharing	<b>I</b>	<b>S</b>		<b>S</b>	<b>A+R</b>	<b>S</b>		<b>S</b>		<b>S</b>	
Prototype (with complex project)	<b>I</b>	<b>R</b>		<b>A +R</b>		<b>I+C</b>					
Design and build data warehouse	<b>I</b>	<b>A+R</b>		<b>S</b>							



<b>Activities</b>	<b>Nominated Project Manager</b>	<b>Tri-B BI Team</b>	<b>ICM/BDU</b>	<b>Analysts</b>	<b>Information Managers</b>	<b>Customer</b>	<b>Supplier</b>	<b>Data Provider</b>	<b>IT</b>	<b>Executive function</b>	<b>Strategic function</b>
Identify data quality issues	<b>C</b>	<b>A+R</b>		<b>R</b>	<b>I</b>	<b>S</b>					
Resolve data quality issues	<b>I</b>	<b>S</b>			<b>I</b>	<b>I</b>		<b>A+R</b>		<b>I</b>	
BI Service Delivery - Connection	<b>I</b>	<b>A+R</b>			<b>I</b>		<b>S</b>	<b>S</b>	<b>S</b>		
BI Service Delivery – Extraction	<b>I</b>	<b>A+R</b>			<b>I</b>			<b>S</b>			
BI Service Delivery - Delivery analysis	<b>A</b>	<b>R</b>	<b>S</b>	<b>S</b>		<b>C</b>		<b>S</b>			
BI Service Delivery - Design/Dashboard	<b>I</b>	<b>A+R</b>	<b>S</b>	<b>S</b>		<b>C</b>				<b>I</b>	
Analysis and modelling	<b>I</b>	<b>R</b>	<b>S</b>	<b>R+A</b>							
User acceptance testing and validating	<b>A</b>	<b>R</b>	<b>S</b>	<b>S</b>		<b>R</b>					
Benefits validation	<b>C</b>	<b>S</b>	<b>R</b>	<b>S</b>		<b>A + R</b>					
Transfer to production	<b>I</b>	<b>A+R</b>				<b>I</b>	<b>S</b>		<b>S</b>		
Run and maintain services		<b>A+R</b>					<b>S</b>		<b>S</b>		
Promote service		<b>R</b>	<b>S</b>	<b>S</b>							<b>A</b>
Train BI Users	<b>I</b>	<b>A+R</b>	<b>S</b>	<b>S</b>		<b>R</b>					
Helpdesk function and customer support		<b>A+R</b>							<b>R</b>		
Evaluate and close project	<b>R</b>	<b>S</b>	<b>S</b>	<b>S</b>		<b>C</b>				<b>A</b>	

<b>Activities</b>	<b>Nominated Project Manager</b>	<b>Tri-B BI Team</b>	<b>ICM/BDU</b>	<b>Analysts</b>	<b>Information Managers</b>	<b>Customer</b>	<b>Supplier</b>	<b>Data Provider</b>	<b>IT</b>	<b>Executive function</b>	<b>Strategic function</b>
Review (ongoing after transfer to production)	<b>C</b>	<b>S</b>	<b>S</b>	<b>S</b>		<b>R</b>				<b>A</b>	
Customer liaison (Throughout)	<b>S</b>	<b>A+R</b>	<b>S</b>	<b>S+R</b>		<b>S</b>					
Project management (Throughout)	<b>R</b>									<b>A</b>	
Benefits management (Throughout)	<b>I</b>	<b>S</b>	<b>R</b>	<b>S</b>		<b>R</b>				<b>A</b>	
Benefits tracking (Throughout)	<b>C</b>	<b>S</b>	<b>A+R</b>	<b>S</b>		<b>R</b>					
Manage infrastructure (Throughout)		<b>A+R</b>							<b>S</b>		
Business change (runs parallel)			<b>R+S</b>								<b>A</b>

## 'Virtual Team': Description and overview of accountabilities and responsibilities

Team or Stakeholder	Accountabilities	Responsibilities (highlighted = shared R with other roles)
Tri-Borough Business Intelligence Team (Jo Lodge)	<ul style="list-style-type: none"> <li>- Customer Liaison</li> <li>- Managing BI infrastructure</li> <li>- Determining BI requirements</li> <li>- Designing and building BI Data Warehouse</li> <li>- BI Service Delivery – connection, extraction, delivery analysis, design of dashboard</li> <li>- Transfer to production</li> <li>- Running and maintaining BI services</li> <li>- Training BI users</li> <li>- Helpdesk function and customer support</li> </ul>	<ul style="list-style-type: none"> <li>- Customer Liaison</li> <li>- Managing BI infrastructure</li> <li>- Plan and scope project</li> <li>- Determining BI requirements</li> <li>- Identifying data quality issues</li> <li>- Prototyping if necessary</li> <li>- Designing and building BI Data Warehouse</li> <li>- BI Service Delivery – connection, extraction, delivery analysis, design of dashboard</li> <li>- Analysis and modelling</li> <li>- User acceptance testing and validating</li> <li>- Transfer to production</li> <li>- Running and maintaining BI services</li> <li>- Promote Service</li> <li>- Training BI users</li> <li>- Helpdesk function and customer support</li> </ul>
ICM/BDU (Martin Nottage/Tim Stranak)	<ul style="list-style-type: none"> <li>- Benefits Tracking</li> </ul>	<ul style="list-style-type: none"> <li>- Business Change</li> <li>- Benefits Management</li> <li>- Benefits Tracking</li> <li>- Benefits Validation</li> </ul>
Analysts (Lee Fitzjohn (LBHF) / Damian Highwood (WCC) + ICM/BDU analysts)	<ul style="list-style-type: none"> <li>- Prototyping if necessary</li> <li>- Analysis and modelling</li> </ul>	<ul style="list-style-type: none"> <li>- Customer Liaison</li> <li>- Determining BI Requirements</li> <li>- Identifying data quality issues</li> <li>- Prototyping if necessary</li> <li>- Analysis and modelling</li> </ul>
Information Managers	<ul style="list-style-type: none"> <li>- Negotiating data sharing</li> </ul>	<ul style="list-style-type: none"> <li>- Negotiating data sharing</li> </ul>

Customer / Business Champion Lead		<ul style="list-style-type: none"> <li>- Benefits Management</li> <li>- Benefits Tracking</li> <li>- Planning and scoping project</li> <li>- Determining BI requirements</li> <li>- User acceptance testing and validating</li> <li>- Training BI users</li> <li>- Review after transfer</li> </ul>
Supplier	- None (Support, Consult, Informed only)	- None (Support, Consult, Informed only)
Data Provider	- Resolve data quality issues	- Resolve data quality issues
IT		- Helpdesk function and customer support
Nominated Project Manager	<ul style="list-style-type: none"> <li>- Plan and scoping of project</li> <li>- BI Service Delivery – Delivery Analysis</li> <li>- User acceptance testing and validating</li> </ul>	<ul style="list-style-type: none"> <li>- Project management for nominated project</li> <li>- Plan and scoping of project</li> <li>- Establish information governance</li> <li>- Evaluate and close project</li> </ul>

## Template Project Plan

X Project Plan

Version 1 DATE

Project activity	Resource (days)	Lead	Week 1	Week 2	Week 3	Week 4	Week 5
Plan and scope project after strategic approval		Project manager					
Gather BI requirements		Tri-B BI Team					
Establish information governance		Project manager					
Negotiate data sharing		Information manager					
Identify data quality issues		Tri-B BI Team					
Resolve data quality issues		Data provider					
Prototype phase		Analysts					
Design and build data warehouse		Tri-B BI Team					
BI Service Delivery - Connection		Tri-B BI Team					
BI Service Delivery – Extraction		Tri-B BI Team					
BI Service Delivery - Delivery analysis		Tri-B BI Team					
BI Service Delivery - Design/Dashboard		Tri-B BI Team					
Analysis and modelling		Analysts					
User acceptance testing and validating		Tri-B BI Team					
Benefits validation		Customer					
Transfer to production		Tri-B BI Team					
Run and maintain services		Tri-B BI Team					
Promote service		Strategic function					
Train BI Users		Tri-B BI Team					
Helpdesk function and customer support		Tri-B BI Team					
Evaluate and close project		Project manager					
Review (ongoing after transfer to production)		Executive function					
Customer liaison (Throughout)		Tri-B BI Team					
Project management (Throughout)		Project manager					
Benefits management (Throughout)		ICM/BDU					
Benefits tracking (Throughout)		ICM/BDU					
Manage infrastructure (Throughout)		Tri-B BI Team					
Business change activities		Strategic function					