

# *The Marlo Group*

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## **Approach to Integration Health Checks & Project Reviews**



# Introduction

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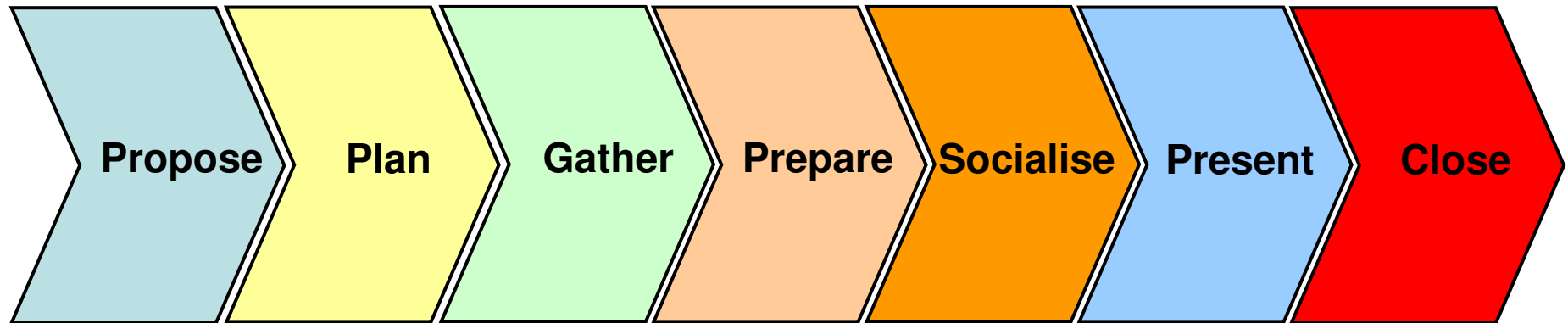
- ❑ **This document describes The Marlo Group approach for conducting Enterprise Integration related reviews. A review may be conducted for an individual project, an infrastructure or the implementation of a specific technology.**
  
- ❑ **In the case of a technology, the review can focus on how it is used, the skills & competencies of the people associated with the technology, and also the interactions with the users & clients of the technology, considering both quantitative & qualitative aspects.**

# Introduction

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- ❑ **The document is in presentation format with the next slide depicting the major steps involved in a review process. The slides following provide a description of the activities and elements that are involved in each step.**
  
- ❑ **It should be noted that this approach is general in nature and is adjusted for each engagement depending on the requirements of the client.**

# Process

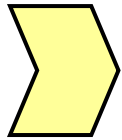


The process flow depicted above shows the high level steps that are undertaken during a review. The Marlo Group approach does not mandate that all steps and activities are undertaken by TMG staff. The review may be managed by the client or by TMG assigned project lead / project manager and may include other SMEs both within and outside the client organisation.



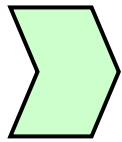
## **Propose**

- ❑ **Client interaction**
  - **Establish scope and high level understanding of project including requirements**
  
- ❑ **Document understanding**
  - **Prepare review proposal for client including the following:**
    - Our understanding of requirements
    - Identify focus areas (People, Process, Technology)
    - Scope
      - *Including estimate of interviews, workshops and locations*
      - *Assumptions, expectations and objectives*
    - Approach
    - High level project plan and schedule
      - *TMG or Customer managed*
    - Resources
    - Cost estimate
    - Deliverables including example TOC
  
- ❑ **Submit**
  - **Submit proposal to client for review and acceptance**



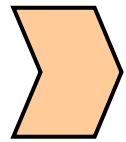
# Plan

- Detailed planning of review engagement**
  - **Prepare detailed plan, schedule, resource plan and revised costing**
  
- Confirm requirements and focus areas**
  - **People, Process, Technology**
  - **Enterprise Integration Elements**
    - Technologies
      - *Applicability, interoperability and sustainability*
    - Architecture & Designs
    - Skills & Competencies
    - Organization & governance
    - Development, Test, Implementation & Support infrastructure and processes
    - Engagement and interaction models
    - Non-functional requirements
      - *Definition and achievability*
      - *Processes and procedures to enable, measure and maintain*
    - Current state
  
- Confirm approach**
  - **Identify stakeholders, SMEs and participants**
  - **Identify review materials**
  
- Develop communications plan**
  - **Schedule meetings and individual briefings**
  
- Schedule interviews and workshops**
- Confirm report deliverable**
  - **Finalise form, structure and content**
  
- Prepare review community briefing pack**
- Conduct briefing(s)**



## **Gather**

- Prepare interview and workshop materials**
  - **Distribute to review community**
- Review materials and undertake examinations**
- Conduct initial round of interviews and workshops**
- Formulate initial impressions**
  - **Issues and findings**
  - **Report to client**
- Schedule and undertake additional interviews & workshops as required**
- Update initial impressions**
  - **Issues and findings**
  - **Report to client**



## *Prepare*

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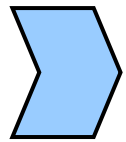
- ❑ **Prepare report**
  - **Including recommendations for each finding**
  
- ❑ **Prepare stakeholder / review community briefing pack(s)**
  - **Separate briefing materials depending on audience**



## ***Socialise***

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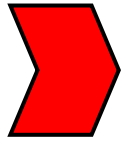
- ❑ **Socialise report with stakeholders**
  - **Incorporate feedback into report and briefing pack(s)**
  - **Multiple cycles as required**
  
- ❑ **Preparation of action list**
  - **Short, medium and long term**
  - **Measurement and success criteria**



## ***Present***

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- ❑ **Conduct briefing with stakeholders and review community**
  - **Multiple briefings depending on material to be presented and the audience**
  
- ❑ **Conduct additional briefings as requested**



## *Close*

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- Handover report to client**
  - **Sign-off**
  
- Close project**

# *Table Of Contents (TOC) Template*

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## **1. EXECUTIVE SUMMARY**

## **2. INTRODUCTION AND SCOPE**

## **3. APPROACH**

- **INTERVIEWS**
- **DOCUMENTATION**
- **PERIODIC REVIEWS**

## **4. BACKGROUND AND CURRENT CONTEXT**

## **5. ISSUES & RECOMMENDATIONS**

- **OVERVIEW OF THIS SECTION**
- **SUMMARY OF RECOMMENDATIONS**
- **ISSUES ....**

## **6. APPENDICES**

- **INTERVIEWEE REGISTER**
- **DOCUMENT REGISTER**
- **MAP TO OTHER REVIEW RECOMMENDATIONS**

## **7. ACCEPTANCE**