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GTC Global Planning Process

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BEGIN REVIEW

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REVIEWERS: Please provide comments to the sub-process under your purview (if any), and also to any general sections on which you have feedback. Thank you in advance, and please remember to:

- Highlight or otherwise clearly mark your comments using your method of choice, as long as it stands out (highlight color selection from Home tab, Track Changes with Comments, handwritten and scanned, etc.).
- Return this document with your comments to Stacie Knasiak ([sknasiak](#)) and Keith Serrao ([kserrao](#)) by Friday, July 19, 2013.
- Complete your review prior to the roundtable discussion meeting to be held the week of July 22, 2013.
- Contact Stacie Knasiak ([sknasiak](#)) if you would like to receive a version of this document that shows Tracked Changes from the preceding draft.

1 Purpose

This document provides guidelines and describes tools intended for use by Business Operations Managers (BOMs) in the GTC Global Planning Process. The planning process consists of seven stages that take place over the course of a fiscal quarter.

2 Scope

This procedure applies to the Global Technology Center (GTC). It includes the following organizations:

| Organizations Affected |
|-------------------------------------|
| GTC Backbone (BB) |
| Global Delivery Partners (GDP) |
| High Touch Technical Support (HTTS) |

3 Process Overview and Flow

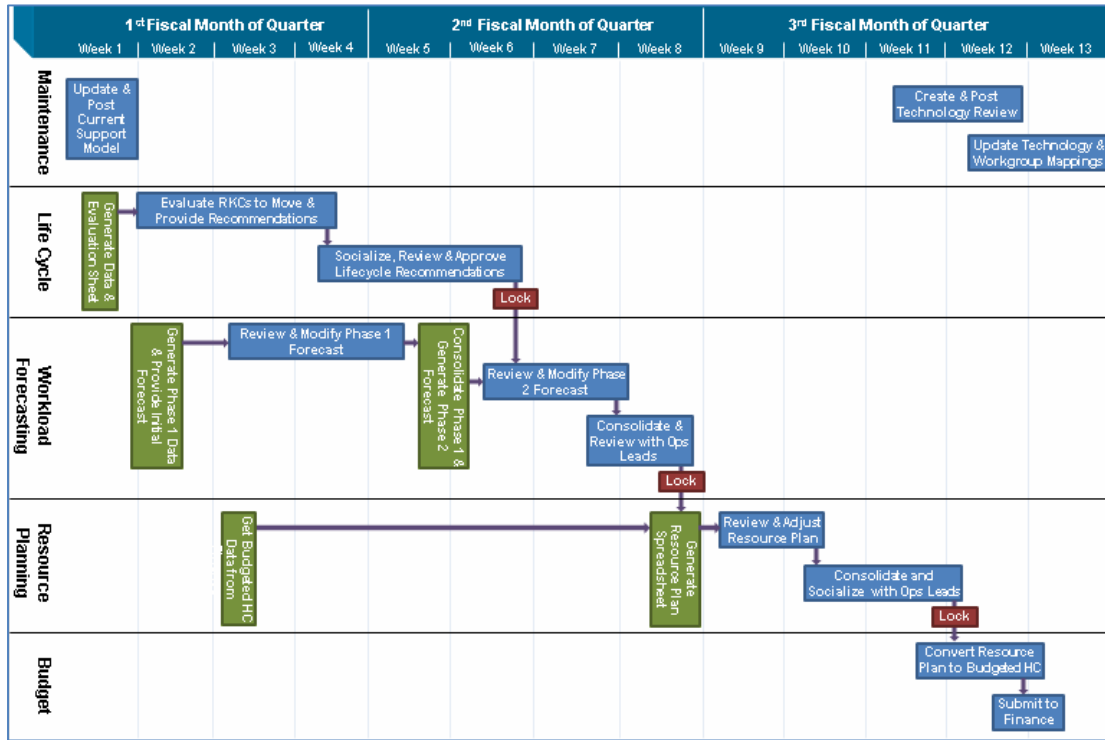
The seven stages, or sub-processes, of the Global Planning Process incorporate data and feedback from various sources. Each sub-process is broken out by Global Technology (also referred to as “Technology”) along with regional considerations. The Global Planning Process is completed quarterly, with a five-quarter view. The seven sub-processes are:



- **Current Support Model:** Documents the current global support environment for each technology; identifies similarities and uniqueness in the way the technology is supported region to region; and identifies challenges, impacts and opportunities within the support model. The current support model is the baseline for the remaining sub-processes.
- **Lifecycle and Sun Setting:** Both drive operational efficiencies by balancing the right resources with the right work. Lifecycle identifies opportunities to transfer work (*e.g.*, BB to/from GDP) to be reviewed and approved for each technology on a quarterly basis. Sun Setting identifies technologies which are becoming more difficult to support due to dwindling customer base, declining SR volume and limited CSE skills to support; identifies opportunities to modify support to better align support resources.
- **Workload Forecasting:** Provides a quarterly forecast of future work for each technology at the regional and global levels; Includes known future activities (*e.g.*, New Product Introduction) that will impact the workload forecast.
- **Resource Planning:** Provides headcount plan for the organization per technology; drives headcount adjustments to align staffing to needs; provides recommendations to senior staff on staffing needs for each technology.
- **Budget Planning:** Incorporates the approved resource plan into the GTC budget.
- **Global Plan:** Provides a unified global support plan for each technology which can be used as a roadmap for the fiscal year.
- **Global Technology Review:** Provides a global snapshot of the state of the business from the previous quarter for each technology to all stakeholders; identifies challenges, impacts and opportunities from the previous quarter as well as what might impact future quarters.

4 Timeline

The process cycle occurs over the length of one fiscal quarter, as represented below:



FYI to Reviewers: Here's the prototype for the new format:

| | 1st Fiscal Month of Quarter | | | | 2nd Fiscal Month of Quarter | | | | 3rd Fiscal Month of Quarter | | | | |
|----------------------|-----------------------------|--------|--------|--------|-----------------------------|--------|--------|--------|-----------------------------|---------|---------|---------|---------|
| | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 | Week 8 | Week 9 | Week 10 | Week 11 | Week 12 | Week 13 |
| Maintenance | | | | | | | | | | | | | |
| Lifecycle | | | | | | | | | | | | | |
| Workload Forecasting | | | | | | | | | | | | | |
| Resource Planning | | | | | | | | | | | | | |
| Budget | | | | | | | | | | | | | |

5 Roles and Resources

Roles and responsibilities (as they relate to the GPP) are categorized as follows:

| Role | Description |
|---------------------------------|---|
| BI BOM | The member of the BOM team responsible for interfacing with the Business Intelligence group with respect to data requirements used within the Global Planning processes. |
| BOM Manager | SDO manager; responsible for supervision of Business Operations Managers (BOMs). |
| Delivery Director | Director responsible for a sub-section of the delivery organization within the GTC. Some delivery directors are responsible for a technology group (eg. In the Americas) while other delivery directors are responsible for sites (eg. In EMEA and APCJ). |
| Finance Analyst | Financial analyst assigned to GTC. |
| GDP BOM | The member of the GDP organization responsible for the Global Plan managed by the GDP partners. |
| Global Planning BOM (GP BOM) | Responsible for the overall global planning process; often referred to as the “Global Planning Lead”. |
| Global Technology BOMs (GT BOM) | Responsible for the global plan for their designated Technologies, interfacing/collaborating with the technology group directors within the Americas. Current GT BOM assignments can be found at BOM Technology Alignment . |

| Role | Description |
|---------------|--|
| OPs Lead | Designated representative for a delivery region within the GTC. Responsible for interlock with the BOMs and the region. |
| Process BOM | Responsible for the overall sub-process execution. The current Process BOM assignments can be found at BOM Technology Alignment . |
| Regional BOMs | Responsible for working with the Global Technology BOM to develop a global plan across all technologies within their region (i.e., APJC, EMEA). Additionally, the Regional BOM also interfaces / collaborates with the Regional Delivery Director. |

6 Current Support Model

The Current Support Model captures and documents the baseline for a technology as of the end of the last fiscal quarter for the next planning cycle.

- Document the current global support environment for each Technology
- Identify similarities and singularities in the way the Technology is supported region-to-region
- Identify challenges, impacts and opportunities within the Support Model

The Current Support Model serves as the baseline for the remaining six sub-processes.

| Task / Role | Inputs | Action Items | Outputs |
|---|--|---|--|
| Make updates to mappings for Technology and Workgroup (from end of previous quarter). <i>GT BOM</i> | Existing mapping from Staging Location in REDACTED Docs [TO COME] | Identify processes scheduled for movement in upcoming cycle. | List of known processes scheduled for work movement in upcoming cycle. |
| Document Current Support. <i>GT BOM</i> | Current Support Model template from Staging Location in REDACTED Docs [TO COME] (see DCSW Global Support Model Q4FY13.pptx ; sources of data in template.) | Create an updated Current Support Model draft document, including processes scheduled for work movement in upcoming cycle. This draft addresses: <ul style="list-style-type: none"> •Logistical Information (queues supported, Workgroups, Managers, number of CSE/TLs) •Products supported •Unique product or support •Exceptions •Service Offerings, if applicable •Existing CAPs •Non-SR activities – TCE, Engineering Engagement, etc. •Regional coverage times | A review-ready draft of the Current Support Model. |
| Review the Current Support Model. <i>GT BOM (Americas)</i> <i>Regional BOM (APJC, EMEA)</i> <i>GDP BOM (GDP)</i> | Draft of Current Support Model (output from previous step) | Review / validate the Current Support Model; revise as necessary and finalize the changes. | Finalized Current Support Model document |

| Task / Role | Inputs | Action Items | Outputs |
|--|--|--|---|
| Communicate the Current Support Model. GT BOM | Current Support Model document (output from previous step) | <ul style="list-style-type: none"> Post to: Staging Location in REDACTED Docs [TO COME] and to Web Ex Social: [TO COME] (currently "Select <desired technology> -> Technology Review -> Support Model") Send email notification to delivery leads and BOMs | Current Support Model (by Technology) accessible by GTC |

7 Lifecycle

The Lifecycle sub-process identifies opportunities to transition work (SRs) in or out of BB, and in or out of GDP. The difference between BB and GDP is that BB supports *high touch and high complexity work*, while GDP supports *high volume / low complexity work*.

- Drives operational efficiencies by balancing the right resources with the right work
- Identifies opportunities to transfer work (e.g., BB to/from GDP) to be reviewed and approved for each Technology on a quarterly basis.

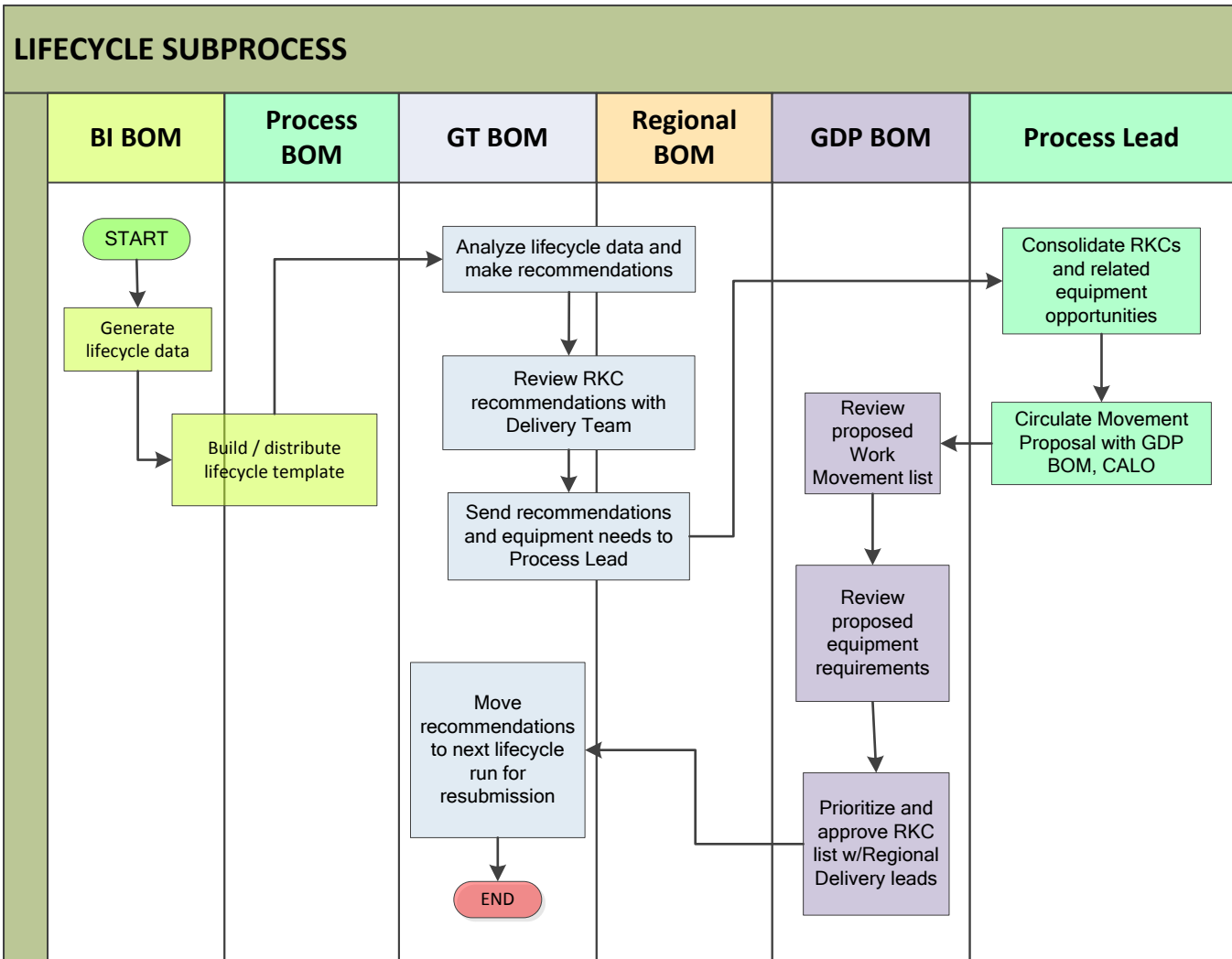
[BEGIN CAVEATS]

The following points have been called out by M. Rollins – the final draft should make sure that they are accommodated.

The actual 'prioritization' that happens with the Directors produces a list of RKC's that are approved, and those that are not. There is no "numbered list" such that unapproved RKC's are automatically approved for next time. Although the list is called "approval/prioritization," in actuality there is no sorted list – just a list of those that are in and those that are not. Those proposed RKC's that don't get approved for transition should be re-evaluated and re-submitted by the GT BOM on the next cycle. However, those resubmissions do not have any priority on the next cycle and will still need to go through the entire process again as business climate and needs may have changed making something else in that tech a better fit for proposal. The GDP BOM also has to re-do his evaluation on the costs associated with it the next lifecycle since the bandwidth for that team may have changed or been repurposed. The process should make sure that it does not give the impression that moving to the next lifecycle means it doesn't need to be re-evaluated through the process.

It must be clear that the GDP BOM does not 'approve' the proposed RKC's -- he only evaluates GDP bandwidth and funding needs against what is proposed so that those data points can be provided to drive discussion with the Ops Lead and Directors in making their decisions.

[END CAVEATS]



| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|---|--|---|
| Generate lifecycle data. <i>BI BOM</i> | SR Data from Tableau tool (see REDACTED Tableau Community) | Retrieve data on SR volumes for all active RKC for the previous six months. | A list of SR volumes for the previous six months, sorted by RKC, by region, and by delivery channel |
| Build lifecycle template. <i>BI BOM (Data pull)</i> <i>Process BOM (Distributes)</i> | Template (see Lifecycle FY13Q3 Evaluation Data AMER in Staging Location in REDACTED Docs . [actual template TO COME]) | <ul style="list-style-type: none"> Populate a copy of the template with the SR volumes for the previous six months (output of previous step); includes <i>auto-calculation for Lifecycle Score and Monthly SR Volume by Product</i>. Distribute to GT BOM. | Completed data sheet for analysis, covering SR volumes for the previous six months |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|---|---|--|--|
| Analyze Lifecycle data and make recommendations. <i>GT BOM, Regional BOM</i> | Completed data sheet (output from previous step) | Analyze lifecycle score and monthly SR volume for transition to/from BB and to/from GDP. <ul style="list-style-type: none"> Use the <i>BB Lifecycle Worksheet [TO COME]</i> to record BB movement to/from GDP. Use the <i>OT Worksheet</i> to record GDP movement to/from BB. <ul style="list-style-type: none"> Use the <i>Recommendations Worksheet [TO COME]</i> to record RKC proposal to move. (add Worksheets to Staging Location in REDACTED Docs) | List of recommendations for transition (the RKC Recommendations) |
| Review RKC Recommendations (GDP-BB, BB-GDP) with Delivery Team. <i>GT BOM (Americas) Regional BOM (EMEA, APJC)</i> | RKC Recommendations (output from previous step) | <ul style="list-style-type: none"> Review RKC Recommendations with Delivery Manager and Directors. Solicit Delivery Managers' recommended RKC transition; add to recommended Lifecycle worksheet. Collect training and lab equipment requirements from Delivery Managers. | Stakeholder-Approved Recommendations for Work transition |
| Send recommendations and equipment needs to Process Lead. <i>GT BOM and Regional BOM</i> | <ul style="list-style-type: none"> Stakeholder-Approved Recommendations for Work transition (output from previous step) HW Worksheet template [TO COME] (add to Staging Location in REDACTED Docs) | <ul style="list-style-type: none"> Complete the HW Worksheet and populate with final RKCs and hardware requirements for transition. Distribute to Process Lead for consolidation. | Finalized HW Worksheet |
| Consolidate RKCs and related equipment opportunities. <i>Process Lead</i> | Individual Technology Workbook recommendations, uploaded to REDACTED Docs | <ul style="list-style-type: none"> Consolidate the data into a final GTC-level Lifecycle Movement-Transition Proposal. Distribute to Regional and GDP BOMs. | Completed, circulated draft of Global Lifecycle Movement Transition Proposal |
| Circulate Movement-Transition Proposal for review by GDP BOM and CALO. <i>Process Lead</i> | Global Lifecycle Transition Proposal (output from previous step) | Distribute for review to: <ul style="list-style-type: none"> GDP for work movement-transitions in/out of GDP CALO for lab equipment requirements | List of: <ul style="list-style-type: none"> Proposed Work transitions Transitions Proposed Equipment Requirements |
| Review Proposed Work Movement-Transitions list. <i>GDP BOM (w/ GDP)</i> | Proposed Work transition Transition list (output from preceding step) | <ul style="list-style-type: none"> Review / analyze GDP bandwidth and funding needs. Freeze approved version in [Staging Location in REDACTED Docs]. | Presentation of Proposed Work Movements-Transitions by technology Technology and their corresponding bandwidth and funding needs |
| Review Proposed Equipment Requirements (CALO Lab impact analysis). <i>Process Lead and GDP BOM (w/ CALO)</i> | Proposed Equipment Requirements list (output from earlier step) | Review / approve Proposed Equipment Requirements list . | An approved plan Plan for equipment Equipment requirements Requirements |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|--|---|---|
| Prioritize and approve RKC list w/Regional Delivery leads. <i>GDP BOM (w/ Ops Leads and Delivery)</i> | Proposed Work Movement plan (output from earlier step) <u>[Ed. Note: Verify two preceding rows re: separate outputs for Work Transitions and Equipment Requirements; and consistent names of output items.]</u> | <ul style="list-style-type: none"> •Prioritize the items on the proposed <u>Proposed Work Movement Transitions</u> plan. •Add recommendations to the plan. •Finalize <u>and approved</u> prioritized <u>Proposed Work Transition</u>work <u>movement</u> plan and corresponding funding. •Process Lead communicates approved RKC to BOM team. | Approved RKC / Work <u>Movement Transition plan</u> Plan |
| Move recommendations to next lifecycle run for resubmission. <i>GT BOM</i> | Approved Work <u>Movement Transition plan</u> Plan (output from preceding step) | <ul style="list-style-type: none"> •Incorporate data in Technology Review (future) and Global Plan. [SOURCES TO COME (add to <u>Staging Location in REDACTED Docs.</u>)] •Freeze approved version in [<u>Staging Location in REDACTED Docs</u>] | List of work transitions prepared for future use |

Note:

See the appendix on Sunsetting for information on Technologies nearing end-of-life status.

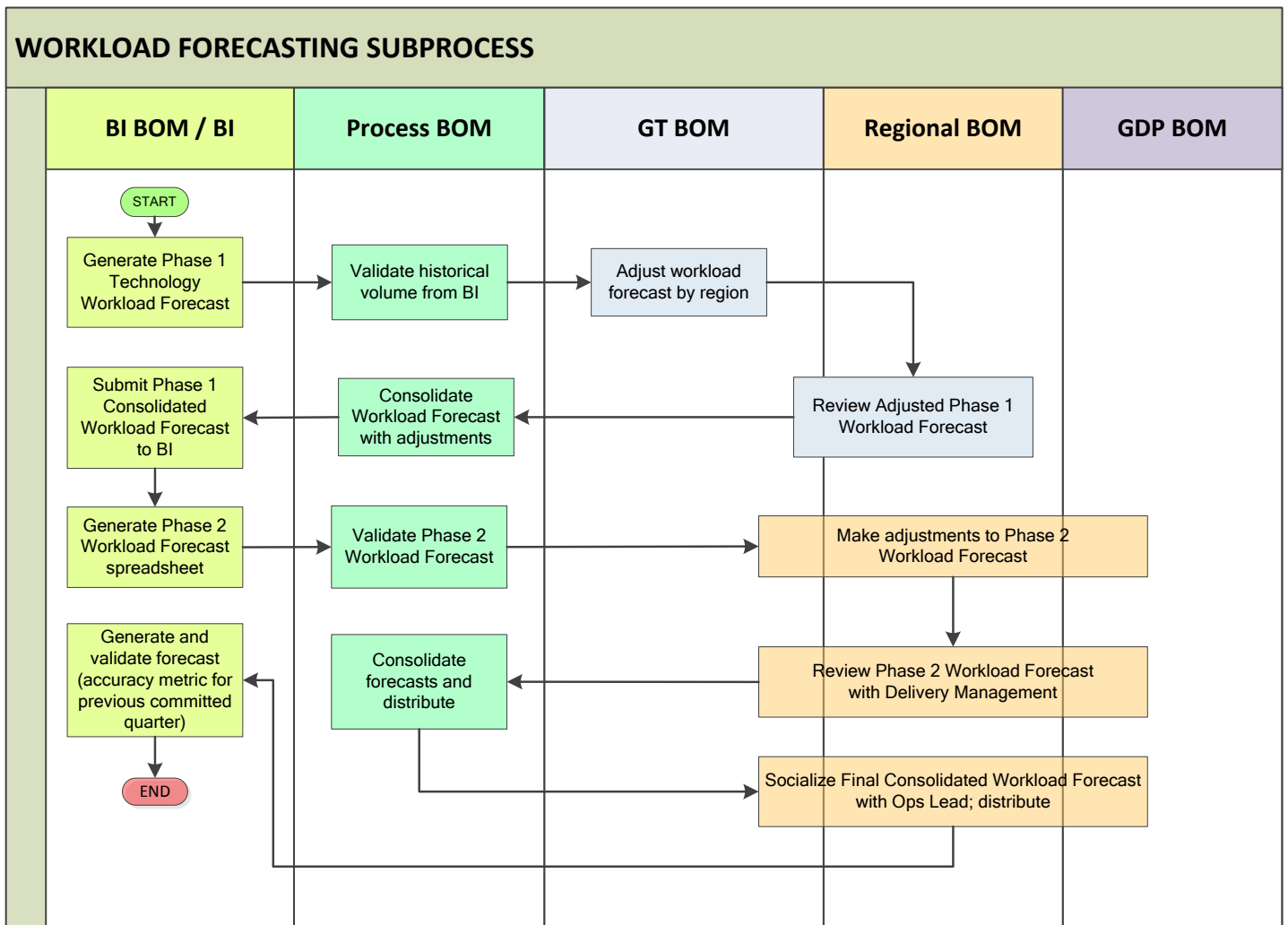
[Editor’s Note to Self: See Lifecycle Template information.]

8 ~~Sunsetting (Placeholder)~~

~~Consider putting in Addendum [Placement TBD]~~

108 Workload Forecasting

The workload forecasting sub-process provides a quarterly forecast of future work for each technology at both the regional and global levels. Adjustments are made to the workload forecast according to known future activities.



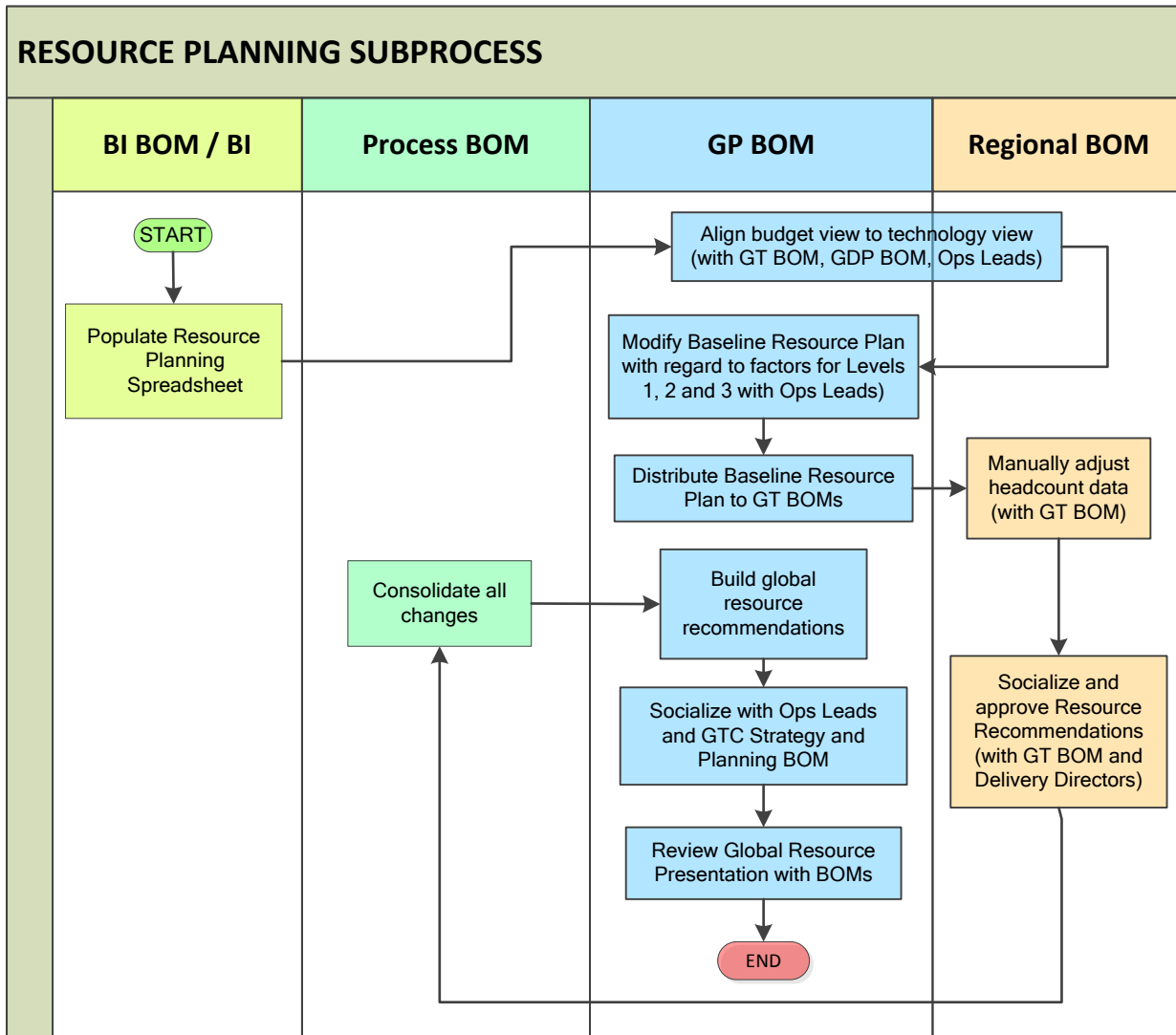
Any reference to SR Volume in the following table is “Current Owner SR Volume”. See [Global TAC Glossary \(EDCS 1147899\)](#) for the definition of “Current Owner SR Volume”.

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|---|--|--|---|
| Generate Phase 1 Technology Workload Forecast. <i>BI</i> | <ul style="list-style-type: none"> Data from the 12-6-6 regional split RKC technology hierarchies Historical TSRT-based SR volumes Workgroup hierarchy [Sources? TO COME] | <ul style="list-style-type: none"> Align historical SR volumes to RKC technology hierarchies (AMER, APAC, EMEA) and by regional time split (12-6-6). Use Holt-Winters and historical SR volume to generate a five-quarter forecast. | <p>Phase 1 workload spreadsheet, containing:</p> <ul style="list-style-type: none"> 8 quarters of historical SR volumes 6 quarters of forecasted SR volumes (current quarter plus the next 5 quarters) Presentation of SR volume is based on region and technology <p>[TO COME FROM JOHN: (add in Staging Location in REDACTED Docs) DOCUMENT RECEIVED FROM BI (controlled doc or just example) for assessment of usability (possible Appendix location)]</p> |
| Validate historical volume from BI. <i>Process BOM</i> | Phase 1 workload spreadsheet (output from preceding step) | <ul style="list-style-type: none"> Review the historical data for accuracy (errors, outliers, misalignment, etc.). Include: <ul style="list-style-type: none"> Historical volume Hierarchies / time of day Forecast trending Request BI validate accuracy as required. Distribute validated Reference to GT BOMs. | <p>Validated Phase 1 workload spreadsheet free from:</p> <ul style="list-style-type: none"> Issues or conflicts Data errors Hierarchy errors |
| Adjust workload forecast by region. <i>GT BOM</i> | Validated Phase 1 workload spreadsheet - by regional time split and Technology hierarchy (output from earlier step) | <p>Adjust workload forecast based on the following considerations:</p> <ul style="list-style-type: none"> Business transitions (NPI/EOL/product forecast, SDLT, Lifecycle). Business activities from the previous planning cycle | <p>Initial draft of Adjusted Workload Forecast</p> <p>[TO COME -- COPY OF DOCUMENT THAT IS DISTRIBUTED FROM JOHN (add in Staging Location in REDACTED Docs.)]</p> |
| Review Adjusted Phase 1 Workload Forecast. <i>GT BOM w/ Regional BOM</i> | Initial draft of Adjusted Workload Forecast (output from previous step) | <ul style="list-style-type: none"> Revise the initial Adjusted workload forecast with regional considerations: <ul style="list-style-type: none"> Include input from Regional BOM. Update as required with input from Delivery. Distribute to Process BOM. | Completed Phase 1 workload forecast with adjustments |
| Consolidate workload forecast with adjustments. <i>Process BOM</i> | Completed Phase 1 workload forecast from each BOM (output from previous step) | <ul style="list-style-type: none"> Organize all Final Regional Technology Forecasts into a consolidated view. Distribute to BI BOM. | Final Consolidated Phase 1 Workload Forecast |
| Submit Phase 1 Consolidated Workload Forecast to BI. <i>BI BOM</i> | Phase 1 Consolidated Workload Forecast (output from previous step) | Send to BI. | Distributed version of Phase 1 Workload Forecast |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|--|---|---|
| Generate Phase 2 Workload Spreadsheet (by region, Technology, and delivery channel). <i>BI</i> | Phase 1 Consolidated Workload Forecast distributed by: <ul style="list-style-type: none"> •technology, region, delivery channel •Phase 1 consolidated regional technology forecast (for % split.) | <ul style="list-style-type: none"> •Regenerate forecast to segregate by Technology, by region, and by delivery channel. •Apply adjusted Phase 1 keyword and workgroup percentages / proportions. | Phase 2 Technology Workload Forecast by: <ul style="list-style-type: none"> •8 quarters of historical SR volumes •6 quarters of forecasted SR volumes (current quarter plus the next 5 quarters) •Presentation of SR volume is based on region, technology and delivery channel |
| Validate Phase 2 Workload Forecast. <i>Process BOM</i> | Phase 2 Workload spreadsheet with historical and forecasted volume data (output from previous step) | <ul style="list-style-type: none"> •Transfer data into workload forecast spreadsheet [TO COME] by region, Technology, and delivery channel. •Distribute to GT BOMs. | Distributed Phase 2 Workload Spreadsheet |
| Make adjustments to Phase 2 Workload Forecast. <i>Regional BOM w/ GT BOMs, GDP BOM</i> | Phase 2 Workload Spreadsheet (output from previous step) | Adjust workload forecast based on the following considerations: <ul style="list-style-type: none"> •Business transitions (e.g., Lifecycle, SDLT). •Adjust Forecast accordingly (quarterly). | Adjusted Phase 2 Workload Forecast |
| Review workload forecast with regional Delivery Management. <i>Regional BOMs w/ GT BOM, GDP BOM</i> | Adjusted Phase 2 Workload Forecast | <ul style="list-style-type: none"> •Review and revise regional workload forecast with input from Delivery Management. •Make agreed-upon adjustments. •Distribute to Process BOM. | Completed Final Workload Forecast (includes approval from Delivery Management) |
| Consolidate workload forecasts and distribute. <i>Process BOM</i> | Final Workload Forecast from each BOM (output from previous step) | <ul style="list-style-type: none"> •Transfer data into a consolidated view. •Post to [Staging Location in REDACTED Docs] | Final Consolidated Workload Forecast |
| Socialize Final Consolidated Workload Forecast with Ops Lead, then distribute. <i>Regional BOMs w/ GT BOM, GDP BOM</i> | Final Consolidated Workload Forecast (output from previous step) | <ul style="list-style-type: none"> •Socialize the Final Workload Forecast with Ops Lead. •Post to [LOCATION TO COME]. •Notify stakeholders. | Accessible, distributed version of Final Workload Forecast |
| Generate and validate workload forecast-accuracy metric for previous committed quarter (monitor phase) <i>BI BOM, Process BOM, GP BOM</i> | <ul style="list-style-type: none"> •Actual SR volumes for previous quarter (by region / technology / delivery channel) •Forecasted SR volumes for previous quarter based on the GP cycle 2 quarters prior to current quarter (by region / technology / delivery channel) | <ul style="list-style-type: none"> •Create percent-accuracy comparison: Forecast for last committed quarter compared to actual work volume for same quarter. •Organize by region / technology / delivery channel. •Store comparison document in [LOCATION TO COME]. | Document containing workload forecast accuracy metrics |

119 Resource Planning

- Plans for headcount needs of the organization per Technology / products
- Drives headcount adjustments to align staffing to needs
- Provides guidance to senior staff on staffing needs by Technology



Note:

Resource Planning concerns BB only -- no GDP content. (GDP BOM uses Outtasker to validate vendor headcount requirements.) [Keith, please verify]

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|---|--|---|---|
| Populate Resource Planning Spreadsheet <i>BI BOM</i> | <ul style="list-style-type: none"> ACOD data set from Phase 2 Technology Workload Forecast (by Technology, region, delivery channel) (output of step in Workload Forecasting section) Budgeted headcount from Finance | Populate Resource Planning Spreadsheet with ACOD data set. Include: <ul style="list-style-type: none"> Work time allocation -- ACOD Budgeted headcount for current quarter <p>[TO COME -- Eric: to provide Resource Forecast Spreadsheet Template (add to Staging Location in REDACTED Docs.)]</p> | Resource Planning Spreadsheet containing ACOD data and budgeted headcount details (with global, regional, and Technology views) |
| Align budget view to technology view. <i>GP BOM w/ GT BOMS, Regional BOMs, Ops Leads, GDP BOM</i> | Budgeted headcount from Finance [TO COME] | GP Lead works with Regional BOM and/or Ops Leads to isolate budget sections for: <ul style="list-style-type: none"> Technology headcount for CSE, Manager, Technology Lead Non-technology headcount (e.g., Director, admin) | List of Itemized Headcount Values at the region Technology level (Baseline Resource Plan) |
| Modify Baseline Resource Plan with regard to factors for Levels 1, 2 and 3. Level 1: Overhead Level 2: Escalation Level 3: Non-SR Activities <i>GP BOM w/ Ops Leads</i> | Baseline Resource Plan (output from previous step) (Editor's Note to Self: See Appendix for 3 PowerPoint examples of L1,L 2,and L 3 adjustments) | <ul style="list-style-type: none"> Delivery Leads and GP Lead review the data, making modifications as needed. Modifications require agreement of the parties. | Baseline Resource Plan, now containing approved regional adjustments |
| Distribute Baseline Resource Plan to GT BOMs. <i>GP BOM</i> | <ul style="list-style-type: none"> Baseline Resource Plan (output from previous step) Spreadsheet template [Need better description; template needs to be created.] | Send Baseline Resource Plan to GT BOMs. | Baseline Resource Plan, now distributed to GT BOMs |
| Manually adjust headcount data. <i>Regional BOM w/ GT BOM</i> | <ul style="list-style-type: none"> Baseline Resource Plan (output from preceding step) Spreadsheet template [Need better description; template needs to be created.] | <ul style="list-style-type: none"> BOMs identify adjustments. (Example: minimum team size, seasonality adjustments, regional availability, other acceptable business factors) Written justification of the manual change | Resource Recommendations (Resource Baseline Plan adjusted manually for guidelines / rules / comments) |
| Socialize and approve Resource Recommendations. <i>Regional BOM w/ GT BOM and Delivery Directors</i> | Resource Recommendations (output from preceding step) | <ul style="list-style-type: none"> Review the Resource Recommendations with Delivery Directors and reach agreement on any adjustments. Approve the adjustments. Freeze approved version in [Staging Location in REDACTED Docs] | First Draft: Director-Approved Resource Recommendations |
| Consolidates all changes. <i>Process BOM</i> | Manual Adjustment documents from each BOM | Process Lead consolidates all BOM adjustments into a single Resource Planning Spreadsheet. | Consolidated Resource Planning Spreadsheet, with global and regional views |
| Build global resource recommendations. <i>GP BOM</i> | Consolidated Resource Planning Spreadsheet (output from preceding step) | Build a presentation covering global resource recommendations. <ul style="list-style-type: none"> Include recommendations from _____ {NEED ROLE(S)}. | Global Resource Recommendation Presentation |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|--|---|---|
| Review Global Resource Presentation with BOMs. <i>GP BOM</i> | Global Resource Presentation (output of preceding step) | <ul style="list-style-type: none"> Review presentation with Global BOM team. BOMs provide feedback on the presentation. | Adjusted Global Resource Recommendation Presentation |
| Socialize with Ops Leads and GTC Strategy and Planning BOM <i>GP BOM w/ Ops Leads</i> | Adjusted Global Resource Recommendation Presentation (output from previous step) | <ul style="list-style-type: none"> GP BOM reviews presentation with Ops Leads. Ops Leads socialize the Adjusted Global Resource Recommendation Presentation with their respective Delivery Leads. | Global Resource Recommendation Presentation with Issue ID (includes list of issues, if any, related to Global Resource Recommendation Presentation) |

[Editor's Note to Self: See [Resource Planning Template information](#) and [Resource Forecasting Steps On Hold.](#)]

1210 Budget Planning

Leverages the approved CSE headcount plan and other cost drivers to develop a budget for the delivery of support per Technology for REDACTED end customers

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|--|---|---|
| Provide Preliminary GTC-level budget. <i>Finance</i> | TS Finance Budget \$ Breakdown [need to verify name of document and where it comes from] | <ul style="list-style-type: none"> Calculate [?] the GTC \$ budget [need name. Provide budget to GTC Strategy and Planning BOM | Preliminary GTC-Level Budget (Preliminary Budget might be presented in more than one iteration) |
| <ul style="list-style-type: none"> Acquire budget "Ask" data by GTC organization. Break down the budget by GTC organization. Reconcile the Budget with GTC "Asks" / recommendations. <i>Strategy and Planning BOM</i> | <ul style="list-style-type: none"> Preliminary GTC-Level Budget (output from preceding step) Resource Plan recommendations (BOMs) [from BOMs? Which ones?] RTB [?] Investment "Asks" Director requests Finance cost data [from where?] Contingency [Are all of these items recognizable / retrievable without more info?] | <ul style="list-style-type: none"> Acquire data from Global Planning Leads. [Note: not defined as a role] Consolidate data into Draft Budget Breakdown. [Ed. Note: I'm not sure what an action of "soliciting requests" means; apologies if replacement wording is incorrect] | Draft Budget Breakdown |
| Socialize Draft Budget Breakdown with Ops Leads. [all Ops Leads? Should it be specified?] <i>Strategy and Planning BOM</i> | Draft Budget Breakdown (output from preceding step) | Interlock with Ops Leads [specify?] to drive organizational alignment. | Updated Draft Budget Breakdown |
| Approve budget. <i>Strategy and Planning BOM (w/ Senior Leadership)</i> | Updated Draft Budget Breakdown (output from preceding step) | <ul style="list-style-type: none"> Facilitate discussion with senior leadership. Drive discussion to resolution and approval. | Final Budget by GTC Organization |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|---|---|---|
| Handoff budget to Finance. <i>GTC Strategy & Planning BOM</i> | Final Budget by GTC Organization (output from preceding step) | Distribute Final Budget by GTC Organization to Finance for input into Finance Planning Tool. (Note: Finance to split budget by department with input from GTC as required.) | Validated Final Budget delivered to Finance |

1311 Global Plan

Provides a unified global support plan for each Technology that can serve as roadmap.

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|--|--|---|--|
| Transform sub-process data into presentation format. <i>GP BOM</i> | <ul style="list-style-type: none"> •Lifecycle Recommendations •Global Resource Plan •Approved Finance and Leadership Adjustments •[Sources?] | Create presentation organized by department, region, and Technology. | Global Plan Presentation |
| Socialize Global Plan Presentation. <i>GP BOM w/ Regional BOMs, GDP BOM</i> | Global Plan Presentation (output from preceding step) | Socialize Presentation with Ops Leads [specify?], Delivery Leads, and Delivery Directors. | Socialized version of Global Plan Presentation |
| Post Global Plan Presentation. <i>GP BOM</i> | Socialized version of Global Plan Presentation (output from preceding step) | Post Presentation to: <ul style="list-style-type: none"> •REDACTED Docs [LOCATION TO COME] •WebEx Social [LOCATION TO COME] | Fully-distributed Global Plan Presentation |

1412 Global Technology Review

- Provides a global snapshot of the state of the business for each Technology on a quarterly basis to all stakeholders
- Identifies challenges, impacts and opportunities within each Technology.

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|---|--|---|---|
| Consolidate and document Technology-impacting information. <i>GT BOM</i> | All impacting information gathered during this cycle's Global Planning Process | Categorize both current and forward-looking Technology impacts according to: <ul style="list-style-type: none"> •Opportunities/threats •Meetings •Technology Planned Movement •Special projects •Trends •Roadmaps (product) •3rd-Party (OEM, acquisitions, etc.) | Technology Review Document with Impacts |

| Task / Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|---|--|--|--|
| Distribute Technology Review Document with Impacts <i>GT BOM</i> | Technology Review Document with Impacts (output of preceding step) | Distribute Technology Review Document with Impacts to: <ul style="list-style-type: none"> •Ops Leads [specify?] •Delivery Leads •Delivery Directors and Managers | Socialized version of Technology Review Document with Impacts |
| Post the socialized version of Technology Review Document with Impacts <i>GT BOM</i> | Socialized version of Technology Review Document with Impacts (output of preceding step) | Post to: <ul style="list-style-type: none"> •REDACTED Docs [LOCATION TO COME] •WebEx Social [LOCATION TO COME] | Fully distributed version of Technology Review Document with Impacts |

15.13 Maintenance and Governance

This document is maintained by the [OWNERSHIP INFORMATION TO COME].

Changes to this document require approvals from both GP BOM and BOM Manager. Approval for changes is recorded in EDCS (see [Section 18 Approvals](#)).

15.13.1 Roles and Responsibilities

[TO COME] [Is this different from “Roles and Resources” earlier in document?]

15.213.2 Process Changes / New Capabilities

[TO COME]

16.14 Process Compliance

Compliance with REDACTED processes is required. Compliance to this process can be verified through various methods, including, but not limited to, reports from available business tools, internal and external audits, self-assessment, and/or feedback to the process owner.

16.114.1 Exceptions

[**SAMPLE TEXT**] Exceptions to the terms of this process are handled on a case-by-case basis only. Exceptions require documented approval by the BOM Manager to non-comply for strategic business reasons. Documented exceptions and justifications will be communicated to affected individuals and organizations immediately upon approval.

16.214.2 Non-Compliance

Non-compliance should be reported to the BOM Manager.

~~16.3~~14.3 Compliance Effective Date

This process becomes effective upon the last date of approval as noted in EDCS.

~~17~~15 Supporting Documents and Tools

[Global Planning REDACTED Docs / EDM](#)

[BOM Webex Community](#)

[Global Planning EDCS](#)

[BOM Team EDCS](#)

Documents of less recent vintage

[Global Service Lifecycle Engagement \(WxS\)](#)

([GSLE > Technologies \(WxS\)](#) is the location for BOMs' *Technology Updates* posts)

[BI Workbooks area](#)

Access restricted; might contain useful formulae or other templates

[BOM Team alias](#)

Useful for sharing discussions and documents; request access from _____.

| Item | location | Comments |
|-------------------------------------|---|--|
| Global Planning REDACTED Docs / EDM | http://ciscodocs.cisco.com/ciscodocs/listFolder?action=listFolder&folderId=0b0dcae181e1b878&folderTitle=Global+Planning | |
| BOM Webex Community | http://iwe.cisco.com/ws#web/gtc/spe/plan_ops/sdo | |
| Global Planning EDCS | http://wwwin-eng.cisco.com/CA/TAC/GTC/SBO/Global_Planning/ | |
| BOM Team EDCS | http://wwwin-eng.cisco.com/CA/TAC/USTAC_GlobalOps/BOM_Team/ | Older documents |
| GSLE Webex Community | http://iwe.cisco.com/ws#web/gsle | From this location you will find the "Technologies" community which is where the BOM's post their "Technology Updates" |
| Technology Webex Community | http://iwe.cisco.com/ws#web/gsle/technologies | See line 6 above |
| BI Workbooks area | http://gtcbi.cisco.com/workbooks | Note: I do not have access to this location but it may contain information you may need. |
| BOM Team Alias | boms@cisco.com | You should request access to this alias as a good part of discussions and documents are shared through this alias |

1816 Related Policy, Process, or Procedure [OPTIONAL]

[Link with name of policy, process, or procedure](#)

[Link with name of policy, process, or procedure](#)

[Link with name of policy, process, or procedure](#)

1917 Definitions

Defined terms are located in EDCS as [1147899 Global TAC Glossary of Terms](#).

2018 Approvals

For a record of the approval history, go to [\[insert link to this document's EDCS File Information location\]](#); from that page, click on the link for "View Approval Record".

[Note: That location will reveal an approval listing similar to the following:]

This revision of the document has been Approved. No changes can be made to this Approval Record

| | |
|--------------------------|---|
| File | 731005_Global_TAC_SR_Transfer_Process.doc (view FileInfo) |
| Revision | 16 (view Revision) |
| Date of Request | 28-NOV-2012 |
| Request Type | Not Chained |
| Status | APPROVED |
| Date Approved | 29-NOV-2012 |
| Class | root.BMS:CA:CSE Global |
| Requestor | sknasiak |
| Reviewer(s) | amolina |
| Notification List | N/A |
| Comments | Revision level numbering scheme now aligns with EDCS; added doc history links |

| Reviewer | Status | Date Submitted | Date Reviewed | Comments | Action |
|----------|----------|---------------------|---------------------|----------|--------|
| amolina | APPROVED | 11/28/2012 11:22:46 | 11/29/2012 19:27:05 | N/A | N/A |

2119 Revision History

The revision history is located in EDCS at [\[insert link to this document's EDCS File Information location#History\]](#).

[Note: That location will reveal a revision history listing similar to the following:]

| History/Revision Information: | | | | | | | |
|-------------------------------|---------------------|--------|----------------|------------|-------------------|------------|--|
| Rv/St | App Record | Size | Doc Modified | | Attribute Updated | | Comment |
| | | | Who | When | Who | When | |
| 14/DR | Sub | 114 KB | Antony Praveen | 05/09/2013 | Antony Praveen | 05/09/2013 | Based on comments from Marty and Marc, following changes are made in the document. 1. Link to FTP handling document in Sec 6.(FTP document is still to be approved) 2. Verbiage corrections to 3.3.4, 3.3.5 and 3.4. |
| 13/DR | Can | 113 KB | Antony Praveen | 04/23/2013 | Antony Praveen | 04/23/2013 | Updates to sec 3 and 4 relevant to SSS, Case Transfer, SLAs, Case notes , Closure and HTTS |
| 12/AP | App | 83 KB | Stacie Knasiak | 11/28/2012 | Stacie Knasiak | 11/28/2012 | Revision level numbering scheme now aligns with EDCS; added doc history links at Revision and Approval sections. |
| 11/OB | App | 82 KB | Antony Praveen | 10/16/2012 | Antony Praveen | 10/16/2012 | Latest corrections from TOF updated in the document. |
| 10/OB | Rej | 83 KB | Antony Praveen | 10/09/2012 | Antony Praveen | 10/09/2012 | •Inclusion of Sec 4.4. Smart Bonding Business- to Business Inclusion of Sec 7.12. Case with business |

END REVIEW

END REVIEW

END REVIEW

REDACTED

Inc

A printed or duplicate soft copy is considered uncontrolled. Refer to the original online version for the latest revision.

Appendix A Sunsetting

[Info to come]

~~Appendix A~~ **Appendix B [Template for gathering baseline information (based on Data Center Switching slides; to be modified)]**

| Category | Americas | | EMEA | | APAC | | |
|----------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-------|
| | U.S. | Mexico City | Krakow | [other EMEA] | Sydney | India | |
| [Info type 01] | [Tech BOM to provide] | [Tech BOM to provide] | [Tech BOM to provide] | [Tech BOM to provide] | [Tech BOM to provide] | [Tech BOM to provide] | [Tech |
| [Info type 02] | " | " | " | " | " | " | " |
| Etc. | | | | | | | |

Structure TBD: Different templates according to needs of particular Technology? One-size-fits-all categories with 'hints' or 'tips'? Other?

~~Appendix B~~ Appendix C Template Odds and Ends

Lifecycle Template information:

Template: LifecycleEvaluationData-AMER-FY13Q3(1)_MS_Amer-example for keith.xlsx (Provide control number for the)

The template is in the form of a spreadsheet workbook. The spreadsheet workbook contains the following worksheets:

Formulas: Auto-calculates a Lifecycle Score. Do not touch this section. The calculation is in Appendix x. Can someone provide?

BB Lifecycle: Includes the Tech-SubTech , Final_Problem_Code, Lifecycle Score (for routable keyword combinations), Average SR volume (last 6 months), and metrics for each (ACOD, TBC, MTTFR, UDC, Bingo, OT Esc %) for technologies supported in BB. Technology and Regional BOMs will evaluate this data and make work movement recommendations.

OT Lifecycle: Includes the Tech-SubTech , Final_Problem_Code, Lifecycle Score (for routable keyword combinations), Average SR volume (last 6 months), and metrics for each (ACOD, TBC, MTTFR, UDC, Bingo, OT Esc %) for technologies supported in GDP. Technology and GDP BOMs will evaluate this data and make work movement recommendations

Q<Q>FY<YY>: 6 Quarters of average technology volume is processed here by the Process Lead (How do we get this? – BI BOM (John Precourt) runs a report out of tableau: Volume and associated metrics- populated into lifecycle spreadsheet – bom will choose technology to review.)

Hardware: What is this? Hardware in transition???

Output: Recommendations for work movement to/from BB and to/from GDP.

Week 3: Generate Lifecycle Performance Data: BI BOM (John Precourt) collects data from (group, source??, how??) and populates the worksheet Q<Q>FY<YY> for all technologies. BI BOM distributes the workbooks to the Technology BOMs (BI gives data??)

Week 4 – 6: Technology BOMs receive workbook populated with SR data (6months) –BOM reviews the backbone lifecycle worksheet for work movement efficiencies and/or economies of scale. BOM identifies opportunities for movement with the following considerations:

In the BB Lifecycle Worksheet:

BOM reviews the Lifecycle Score by routable keyword combinations (RKC) for cases supported by the backbone. Also lists the average monthly SRs over the last 6 months.

Note: Lifecycle is a score that estimates the level of complexity of support. The score is a function of various average variables (ACOD: Adjusted Case Owner Days, TBC: Time Based Complexity, MTTFR: Mean Time to final resolution, Requeues, FDR%: First Day Resolved, UDC: User Defined Complexity, Bingo). (Have an appendix illustrating how lifecycle score is calculated.. – who can provide?). If:

BB Lifecycle worksheet considerations:

Lifecycle Score > 100 = Highly complex > should stay in backbone

Lifecycle Score < 100 = Simple > may move to gdp

Monthly SR > 30 = High volume > enough volume to warrant a move to GDP if lower complexity

Monthly SR < 30 – Low volume > may not warrant a move

The indicator averages are also listed in the worksheet. Positive indicators are listed in green. If there a many indicators illustrated in green, that is another trigger to note movement to GDP

Example: BOMs should consider moving processes with scores under 100 and monthly SR Volume exceeding 30 from the backbone to GDP. This is a subjective decision. A score of 93, for example is on the cusp. (Secondary decision) BOMs should determine if the volume, etc warrants a move. Sometimes, the decision may be to monitor for another quarter.

In the OT Lifecycle Worksheet:

BOM reviews the Lifecycle Score by routable keyword combinations for cases supported by GDP. Also lists the average monthly SRs over the last 6 months.

Note: Lifecycle is a score that estimates the level of complexity of support. The score is a function (ACOD, TBC, MTTFR, Requeues, FDR%, UDC, Bingo).

BB Lifecycle worksheet considerations:

Lifecycle Score > 100 = Highly complex > consider moving to backbone

Lifecycle Score < 100 = Simple > may stay in GDP

Monthly SR > 30 = High volume > consider leaving in GDP

Monthly SR < 30 – Low volume > may warrant move to BB

The indicator averages are also listed in the worksheet. Negative indicators are listed in red. If there a many indicators illustrated in red, that is another trigger to note movement to backbone

Example: BOMs should consider moving processes with scores over 100 and monthly SR Volume exceeding 30 from the GDP to the backbone. This is a subjective decision. A score of 104, for example is on the cusp of complexity. (SECONDARY DECISION) BOMs should determine if the volume low enough, etc warrants a move. Sometimes, the decision may be to monitor for another quarter.

Recommendation: Once the BOM determines the recommended RKC (S)he should copy the lines from the BB and OT Lifecycle worksheets and paste the line in the recommendation worksheet. BOM should prioritize their recommendation per the priority defined below:

Priority:

- 1 - High Priority (Meets the Metrics)
- 2 - (Slight Deviation from Metrics)
- 3 - (Moderate Deviation from Metrics)

Pull Back

- A - RKC Complexity
- B - Product Changes
- C - Customer Satisfaction
- D - Insufficient Volume
- E - Other

Subpriority:

- 1 - Immediate Opportunity
- 2 - Short Term Opportunity
- 3 - Long Term Opportunity

QXFYYYY: Do not touch. This is the data file. This is the data file with historical data.

Week 6 – 8: Technology BOM Reviews with Process BOM (for consolidation), Regional and GDP BOMs for recommendations. GDP BOM reviews with GDP. Regional BOMs review with Regional Delivery Directors. Hardware Worksheet: If CALO labs requirements are needed, BOM lists any hardware and part numbers required in each region to facilitate transition. Requirements may be local or remotely accessible.

Week 8: Final decisions are made for recommendation implementation. All recommendations are delivered to Process BOM. Process BOM consolidates and posts final data to cisco docswhere??

Resource Planning Template information.

<https://cisco.webex.com/ciscosales/lsr.php?AT=pb&SP=MC&rID=68260317&rKey=913300fdf49936e8>

Resource Template: Resource Forecast Consolidated - FY13 Q3.xlsx

- Workload forecast is consolidated (Eric Fraser – Resource Planning Lead) – he consolidates sr volume forecast. Eric also preps the spreadsheet by department ID and cses in each department supporting each technology. Eric removes the managers, Escalation engineer, etc.; removes non-productive folks.
- CSEs: Case Takers
- ESC. CSE/TLs: Do not currently plan. Currently, ASSUMED that current ESC. CSEs/TLs is valid...BOM makes not changes to this headcount.
- Note: For Regions (Incubation org.) – Try to follow same process.
- Action Note: (Discuss and clarify where BOMs are formally responsible for re: Theaters/Regions/Incubation vs. influence.)
- Eric also populates SR Count and ACOD hours. There is an autocalculated formula that calculates amount of work hours to support the cases. This translates to worktime hours.
- Once he populates, he will send spreadsheet to technology and Regional BOMs.
- BOMs will look at required worktime hours for forecast against available worktime. And reviews against autocalculated HC by Days.
- HC is further adjusted:
 - There is a 5% uplift to support the GTP
 - Internal Escalation: add back actual HC numbers(??? Not following here)
- Now you have the total engineers needed.

- Now add back other non-casework activities: it’s a blanket 10% uplift (for specializations, training, regional projects, etc.)
- Once you have the forecasted numbers, can look at Q3 numbers and compare.
- Now need to subjectively adjust and smooth current to needed resources. (ACOD differences, smoothing, minimum team size, etc.)
- Note: Discuss how many min engineers are in a workgroup before talking about org changes.
- Then look at all the quarters and smooth headcount over time.

Resource Forecasting Steps On Hold

| # | | Responsible Role | Inputs (Source Materials) | Action Items | Outputs (Resulting Materials) |
|----|--|------------------|--|---|---|
| 8 | Calculate average ACOD by technology, region, delivery channel | BI | Total amount of time a workgroup spent working on cases during the sample period. Total number of cases that a workgroup closed during the sample period. | Calculate the average number of hours per SR for each technology, region, delivery channel. | Average number of hours per case for each technology, region, delivery channel. |
| 9 | Populate work hours by technology, delivery channel, per quarter | BI BOM | Average number of hours per SR for each technology, region, delivery channel. Work Forecast by technology by region by delivery channel | Calculate the forecasted work hours for each technology, region, delivery channel per forecasted quarter | Total work hours for each technology, region, delivery channel per forecasted quarter |
| 10 | Populate headcount needs to cover work (work hours, PTO, other non work time) - Level 1 | | Total work hours for each technology, region, delivery channel per forecasted quarter. Level 1 factors - PTO, other non work time | Calculate the days of work based on hours per day and forecasted work hours. Calculate raw headcount based on days of work and days per quarter. Calculate the adjusted headcount accounting for level 1 factors. | Forecasted headcount based on level 1 adjustments. |
| 11 | Populate headcount based on other SR work activities (escalations, minimum teams) - Level 2 | | Forecasted headcount based on level 1 adjustments. SR work activities (escalations, minimum teams) - Level 2 factors | Calculate headcount based on work not calculated in SR work time – GDP/Escalation (i.e collaboration). | Forecasted headcount based on level 2 adjustments. |
| 12 | Populate headcount based on non SR work factors (Prjs, training needs, Specialization) – Level 3 | | Forecasted headcount based on level 2 adjustments. non SR work factors (Prjs, training needs, Specialization) – Level 3 | Calculate headcount based on non SR work – Gold priorities, training, regional projects and specializations. | Forecasted headcount based on level 3 adjustments. |

BOM identity tables

Remove table upon WxS link verification. Send reviews to these people with due date and call out the sections they need to review

| Process: | BOM: (TO BE VERIFIED) |
|--------------------------|---|
| Global Process Program | Paul Pesek (Lead) |
| Current Support Model | Cynthia Colbert |
| Lifecycle & Sunsetting | Mike Rollins (Lead) John Whalen |
| Workload Forecasting | Mike Rollins (Lead) John Precourt |
| Resource Planning | Eric Fraser John Precourt |
| Budget Planning | Paul Pesek (Lead) Jonathan Wade (Verify: What about D. Marie in Finance?) |
| Global Plan | Paul Pesek |
| Global Technology Review | Cynthia Colbert |

Remove table upon WsX link verification. MOVE TO APPENDIX

| Global BOM Assignments | | Ops Leads |
|-----------------------------|-------------------|---|
| Technology: | BOM: | <ul style="list-style-type: none"> I think we need to map the owners from a delivery perspective No one to one correlation. Would look at at higher level...ie delivery directors. (Amer – directors, Regions (AP, EMEA) = Regional BOMs, OT = John Whalen |
| LANSW | Singar (SP??) | |
| ATM/WAN-SW(Carrier Service) | Cynthia Colbert | |
| Optical | Cynthia Colbert | |
| Physical Security | Mike Rollins | |
| AAA | Karthick Sengodan | |
| IDS | Karthick Sengodan | |
| Firewall | Karthick Sengodan | |
| VPN | Karthick Sengodan | |
| Ironport | Tara Doucette | |
| ACCESS | Cynthia Colbert | |
| PQ | Cynthia Colbert | |
| Content | Eric Fraser | |
| Architecture | Eric Fraser | |
| Smart Services | Tara Doucette | |

| | | |
|----------------------------------|--------------------------|---|
| IOS-XR | Cynthia Colbert | |
| RP | Cynthia Colbert | |
| CUCM | Jason Brousseau | |
| Meetingplace | Mike Rollins | |
| MS Voice | Jason Brousseau | |
| UCC Enterprise | Mike Rollins | |
| UCC Express | Mike Rollins | |
| UNITY / Apps | Mike Rollins | |
| NMS | Tara Doucette | |
| Wireless | Mike Rollins | |
| Data Center Switching (incl SAN) | Paul Pesek | |
| Server Virtualization | Paul Pesek | |
| SP Mobile | Jeff Monk | |
| SP Video / Cable (TDM) | Jeff Monk | |
| TelePresence (TDM) | Eric Fraser | |
| APJC Regional BOMs | Jerry McQ. (sp.?) | BOMs work with regional boms for regional issues, |

[NEXT] Template info

~~Appendix C~~ **Appendix D** Blanks to fill in

Add definition of 'Tableau' to Glossary

Create Process BOM WxS post (similar to GT BOM alignment post)

Add link to Process BOM WxS post

Verify WxS GT BOM Alignment post replaces table in document

Remove GT BOM Alignment Table

[LIFECYCLE EVALUATION TEMPLATE] to contain guidelines on how / what material gets incorporated

Need LIFECYCLE WORKSHEET as in STEPNO

Need RECOMMENDATIONS WORKSHEET as in STEPNO

REDACTEDdocs staging location

<http://ciscodocs.cisco.com/ciscodocs/listFolder?folderId=0b0dcae1806927b2&folderTitle=PMO&action=listFolder>

~~Appendix D~~ **Appendix E** Template Roundup

Reminder list of templates needed:

- 1) Current support model – ppt, have draft , contact Paul
- 2) Lifecycle – have draft, to templatize, contact Paul
- 3) Workload (how many??),- what to provide, contact john precourt
- 4) Resource, spreadsheet template, eric fraser
- 5) Budget – N/A
- 6) Global Plan, ppt, paul
- 7) GTR, word, Paul