

IT Solution Planning

Chartwell IT's Planning Services cover a set of tasks targeted at selecting the right technical solutions for a given business initiative. A *Solution Plan Document* is the main deliverable for these services. It contains goals, directions, options, and risks related to the technology segments of the initiative. If desired, it may optionally discuss initial schedules, budget estimates and project staffing strategies.

All of our Planning Services are structured to be customer specific. Our process for delivering these services is divided into Discovery, Analysis and Recommendation phases.

Discovery Phase

The strategy for identifying the most important requirements is to look closely at four focal points:

People	Identify current and future stakeholders. Capture high-level requirements and understand the functional needs and desires for each stakeholder.
Process	Isolate business processes that will likely be affected by the initiative. Determine if new processes are necessary, or how existing processes may change.
Information	Identify existing data repositories and explore how they will be impacted by the initiative. Review business rules and security constraints to form an appreciation of the future data model and application environment.
Technology	Determine the current technology status of the organization for each area that may be impacted by the initiative. Understand the capabilities, strengths and preferred direction of the client's I.T. group.

In addition, the initiative's goals, organizational benefits, opportunities, major milestones and success criteria are gathered. This information, plus the data gathered above, produces a clear picture to be used as a foundation in subsequent phases.

Analysis Phase

This phase focuses on absorbing the information gathered in the discovery phase, and filling any knowledge gaps that may exist. It addresses issues relating to:

- Technology architecture options
- Technology scaling issues and options
- Build vs. buy decisions
- Production system deployment options
- Options for structure of projects and phases
- Identification of risks and unknowns
- Long term support strategies and options

The final goal of the analysis phase is to formulate a high-level solution design, or multiple design options.

Recommendation Phase

The data gathered in the prior two phases are consolidated into recommendations regarding:

- The specific components of the overall technology solution
- A breakdown of individual projects and phases needed to achieve the solution
- A definition of project roles that will be necessary to implement the solution
- Strategies for operation of the production system, i.e. outsource or host internally
- The support strategy for the solution

Solution Plan

The *Solution Plan* includes a formal statement of the data gathered in the Discovery and Analysis phases and recommendations for producing the solution. The *Solution Plan* is presented as a document and discussed in a formal presentation to the executive sponsors.