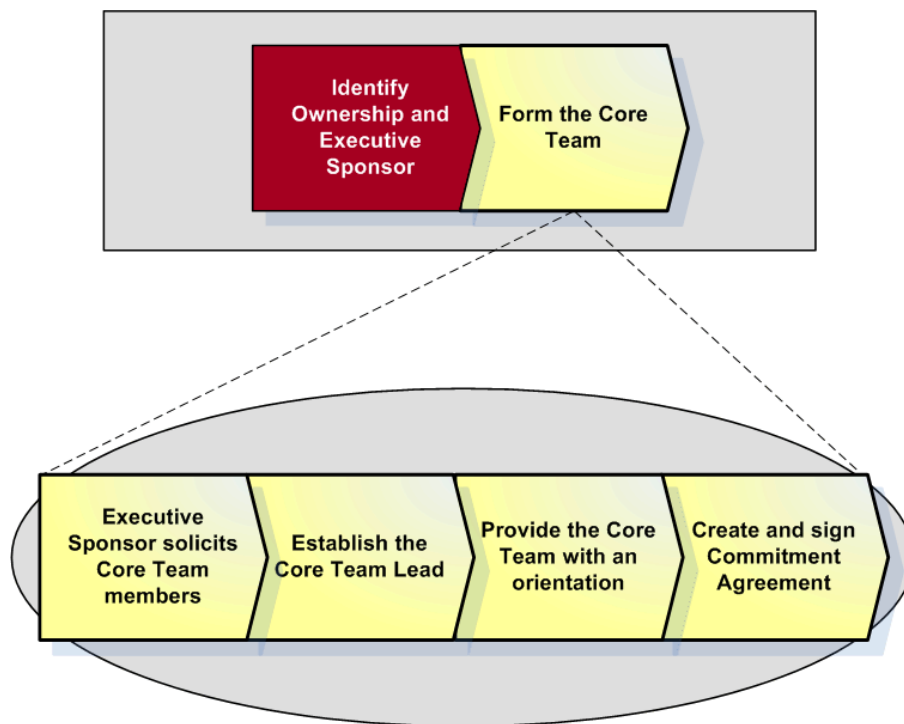


Step C: Form the Core Team

Version 1.5, December 2006

1. Step Description and Purpose

The *Form the Core Team* step is intended to get the right people to participate in the MBT process and to ultimately help guide and shape the findings and recommendations captured in the Modernization Blueprint. The Executive Sponsor solicits key resources from each of the affected organizations and forms the core team that will remain as a standing body throughout the MBT process. This step concludes with a Commitment Agreement that bonds the core team into active and constructive participation throughout the MBT process.



2. Activities within this Step

The table below provides a quick reference for the activities within this step.

<i>CTRL + click the activities for activity details -></i>	Executive Sponsor solicits Core Team members	Establish the Core Team Lead	Provide the Core Team with an orientation	Create and sign Commitment Agreement
Inputs (source)	Record of Decision for Business Area to Blueprint (Step A) Blueprint Purpose Statement (Step B)	Record of Decision for Business Area to Blueprint (Step A) Blueprint Purpose Statement (Step B)	MBT Training Materials (MBT Toolkit)	Record of Decision for Business Area to Blueprint (Step A) Blueprint Purpose Statement (Step B)
Outputs	Core Team Solicitation Memorandum	Core Team Formation Memorandum	None	Core Team Commitment Agreement
Who (role)	Executive Sponsor [R] Business Area Leaders [C]	Executive Sponsor [R]	Executive Sponsor [C] Core Team [I] Enterprise Architect [R]	Executive Sponsor [C] Core Team [R] Enterprise Architect [Support]
Duration (calendar days for an average project based on past projects)	30 day	15 day	5 days	25 days
Complexity				

Legend

Complexity:

Low → High

Who:

R = Responsible
I = Informed
C = Consent

Keys to Success:

Ensure that you have Core Team members that are eager to participate in modernization planning. A good Core Team is more important than quickly completing this Step.

3. Activity Details

Activity 1 – Executive Sponsor solicits Core Team members

Activity Short Description:

The Core Team is a critical entity throughout the MBT process. Without a strong, enthusiastic, and constructive Core Team, the end results of the study will not be validated, highly applicable, and will probably not be able to be implemented due to organizational resistance. This activity is focused on the Executive Sponsor working to discover and recruit the best and brightest representatives from the affected organizations. All affected organizations need a seat at the table and that seat needs to be filled by an individual who will embrace the Blueprint Purpose Statement from Step B and respond positively to the Executive Sponsor and the other Core Team members. In general, you want less than 10 people on the Core Team.

Activity Tasks:

1. The Executive Sponsor can work with the other business area leadership to identify the best people to represent the organizations on the Core Team. The Executive Sponsor can send the Core Team Solicitation Memorandum to the business area leadership in order to get nominees for Core Team members. Remind the Executive Sponsor that Core Team members might need to meet as frequently as once per week.
2. The Executive Sponsor should have the applicable organizational leads contact identified Core Team members. The Executive Sponsor should then follow up with a phone call or meeting with each Core Team member to discuss the intent of the study and resource commitments.
3. Schedule the first Core Team workshop

Activity Communications Considerations:

Let the Executive Sponsor know that it is OK to be picky about who will be on the Core Team. Non-supporting members can be highly distracting to the team and its focus. Positive members are ones that are constructive and willing to commit the time and energy to the endeavor. Also let the Executive Sponsor know that it is important to initially communicate one on one with each of the Core Team members. The Executive Sponsor should welcome the Core Team members and communicate the value of their contributions and time sacrifices.

It is also critical for there to be accurate communications as to the role and time commitment associated with this endeavor. Ensure that the prospective core team members know what level of effort to expect during development of the Blueprint. Their input during this process will not be exclusively an oversight, but they will be expected to participate in the development of findings, recommendations and "sell" these through their organization. They will essentially "own" the blueprint outcomes.

Activity Work Products and Templates:

Core Team Solicitation Memorandum: This memorandum serves to solicit business area leadership in order to gather potential members for the Core Team. This memorandum restates the Purpose Statement for the Blueprint, the expected time commitments, and asks for nominations of Core Team members to represent affected organizations.

- **TEMPLATE :** [Link to Core Team Solicitation Memorandum \(MS Word format\)](#)

Activity 2 – Establish the Core Team Lead

Activity Short Description:

At the initial Core Team Workshop (scheduled in Activity 1), the team will convene to work through Activities 2, 3, and 4. The first order of business during the workshop is to provide a brief overview of the process, a brief overview of how the study came about, and then to vote on a Core Team Lead. The Core Team Lead will work more closely with the Enterprise Architect and the governance teams throughout the MBT process. The Core Team Lead should have good communications and presentation skills and be willing to be actively engaged with coordinating Core Team meetings and review sessions.

Activity Tasks:

1. Provide the Core Team with a brief overview of the record of decision from Step A and, if necessary, the prioritization process from Step A.
2. Provide the Core Team with the Blueprint Statement of Purpose from Step B.
3. Provide the Core Team with a brief overview of the MBT including, most importantly, the breadth of areas typically studied by the MBT.
4. Provide the Core Team with an overview of other business areas using the MBT to perform transformation planning and their experiences and time commitments.
5. Solicit self-nominations to be the Core Team Lead.
6. Conduct a vote (a silent vote might be a good way to do this), tally the results, and inform the Core Team.
7. Draft the Core Team Formation Memorandum to communicate the membership, purpose statement, and time commitments to a wider audience.
8. Circulate the Core Team Formation Memorandum to the Core Team for review and feedback.
9. Have the Executive Sponsor distribute the Core Team Formation Memorandum to the leads of all affected organizations.

Communications Considerations:

The role of Core Team Lead can be daunting and without a well articulated explanation of the role, there will be no volunteers. Be sure to communicate the expectations and benefits of the role so that you can solicit some self-nominations.

Activity Work Products and Templates:

Core Team Formation Memorandum: This memorandum serves to communicate and make official the existence and purpose of the Core Team as well as the membership that has been drawn from each of the affected organizations. This is an official communications mechanism.

- **TEMPLATE :** [Link to Core Team Formation Memorandum \(MS Word format\)](#)

Activity 3 – Provide the Core Team with an orientation

Activity Short Description:

This activity is focused on providing a more detailed training session on the MBT approach and what they can expect over the next several months. It is important to also communicate the time commitments that they should expect during the course of the MBT.

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Activity Tasks:

1. Leverage the MBT Training Materials from the MBT Toolkit in order to tailor a succinct presentation that will provide a more detailed overview of each of the Steps for creating a Modernization Blueprint.
2. Perform the training over the course of a couple of a half day sessions. Provide the Core Team with URLs, phone numbers, and email addresses for key contacts should then have additional questions or concerns.
3. Answer any questions that they might have.

Activity Communications Considerations:

This activity is not about getting the Core Team trained as MBT practitioners. This activity is about providing a more detailed understanding of what the Core Team will be experiencing, hearing, and contributing to over the next several months. This should provide the Core Team with a better understanding of their time commitments and what they will ultimately produce of value at the end of the MBT process.

It may be desirable to initiate each MBT Step with a quick overview session (not more than 1-2 hours) to refresh the Core Team's understanding of what comes next as they proceed through subsequent transformation activities. This will help keep the Core Team focused on the upcoming MBT activities in each Step, and also maintain awareness of progress as the team proceeds through the MBT.

Activity Work Products and Templates:

None

Activity 4 – Create and sign Commitment Agreement

Activity Short Description:

The Core Team has been trained and has been briefed on the Blueprint Purpose Statement from Step B. Before the Core Team moves into analysis mode, it is important to capture the spirit and commitment of the team in a simple Commitment Agreement. This activity is focused on producing this Commitment Agreement so that there is a bond and common cause that is harnessed from the start of the study.

Activity Tasks:

1. Review the record of decision from Step A and the Blueprint Purpose Statement from Step B with the Core Team.
2. Review the concept of a Commitment Agreement – what it is, and what it is not.
3. Review the Commitment Agreement template which includes an example of a Commitment Agreement.
4. Facilitate a discussion about what is good and bad about the Commitment Agreement template. Make these updates to the Commitment Agreement in real time.
5. Once there is unanimous support for the Commitment Agreement, declare it official by having the Core Team sign the document. Note that this might have to be taken offline and done through a series of emails. It is optimal to have this done in person, and signed at the workshop.

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Activity Communications Considerations:

Without consensus as to commitment of the Core Team members, there will be too many divergent paths for members to take as the team progresses into the MBT. Although there will be an Executive Sponsor throughout the process, the Core Team members need to see that the other Core Team members are committed to being active and constructive participants in the process .

Activity Work Products and Templates:

Core Team Commitment Agreement: This is a short document that builds from the Blueprint Statement of Purpose (Step B) and the record of decision (Step A) and commits the members of the Core Team to participate in the development and implementation of the Modernization Blueprint.

- **TEMPLATE :** [Link to Core Team Commitment Agreement \(MS Word format\)](#)

4. Step References

Not Applicable.