



U.S. General Services Administration

# Federal Acquisition Service

Integrated Technology Services

## **Transition Planning and Preparation**

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## ***Five Guiding Principles***

***(GAO Report: Guidance Based  
On Sound Practices)***

## FTS provided transition guidance that fully addresses two of the five sound practices

Sound transition planning practice	Example of how the practice has been addressed
<b>1. Strategic Analysis of Telecom Requirements</b>	Available guidance recommends that Agencies involve the enterprise architect to ensure that planning is consistent with enterprise architecture guidance and to determine, based on the level of complexity of the transition, whether any changes should be made before or after the transition.
<b>2. Resource Identification</b>	Available guidance indicates that necessary staffing and financial resources should be anticipated early and accurately and that Agencies should develop a forecast of required resources throughout the transition to Networx. Available guidance also suggests that Agencies examine current resources to determine if adequate personnel exists; address shortfalls that may require contractor support; and identify personnel to receive training, and the desired scheduled and locations of training.

## Guidance has not been provided on aspects of the three remaining practices

Sound transition planning practice	Aspect of the practice not addressed
<b>3. Telecommunications Inventory</b>	FTS is compiling a baseline inventory to aid Agencies during the transition, <u>but has not provided guidance on establishing an inventory process that can be utilized to maintain telecommunications inventories during and after the transition.</u>
<b>4. Structured Transition Management Approach</b>	Guidance provided suggests that transition managers should ensure that Agencies have adequate internal project management support for the expected transition workload, and, if appropriate, a hierarchy of transition teams at the sub-agency level. <u>However, the guidance reviewed does not address the importance of Agency use of project management, configuration management, and change management processes.</u>
<b>5. Transition Plan</b>	Available guidance indicates that Agencies should identify transition goals and develop a prioritized list of tasks and a schedule with key dates to assist in transition management. <u>However, none of the guidance reviewed addressed Agencies establishing measures of success or performing a transition-specific risk assessment.</u>

## Transition Planning and Preparation Survey

- Survey will be distributed to all assigned Agency Transition Managers (TMs)
- TWG chair requests TM complete survey and return
- TWG recommends TM complete survey and post to file
- May be used as a transition preparedness checklist
- Follow up surveys to be developed

## Proposed Items to Assess Transition Preparation

- Has Agency identified Transition Manager
- Has Agency Identified Transition Support Team
- Has Agency Identified required transition support staffing
- Has Agency engaged Security Office and identified Security Requirements
- Has Agency collected it's inventory
- Has Agency accomplished it's architectural assessment

## Proposed Items to Assess Transition Preparation (cont)

- Has Agency Conducted Initial Transition Planning
  - Has Agency Identified any potential Orphans
  - Has Agency Identified services to be disconnected
  - Has Agency Identified services to be transitioned like for like
  - Has Agency Identified services to be transitioned to enhanced service types
  - Has Agency Identified services to be migrated from non-FTS contracts

## **Proposed Items to Assess Transition Preparation (cont)**

- Has Agency developed overall Transition Schedule (priorities & constraints)
- Has Agency identified and developed any needed documentation
- Has Agency identified key personnel
- Has Agency identified transition resources
- Has Agency reviewed and revised, as necessary, its Agency Hierarchy Code (AHC) structure
- Has Agency developed evaluation and selection process and criteria





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## **Consolidated Systems Transition**

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## NETWORKX TRANSITION

- Focus
  - This plan is for GSA Consolidated customers
  - Consolidated customers are those customers receiving local services from a GSA owned Private Branch Exchange (PBX), Centrex, Centrex-like or access environment
  - It is intended to insure a successful transition from FTS2001 to Networkx

# NETWORKX TRANSITION

- Overview
  - Service Environment and Process Drivers
  - What Needs To Be Done
  - Who Needs To Do IT
  - When Does It Need To Be Done
  - How Do We Communicate
  - How Do We Handle Exceptions

## PROCESS DRIVERS

- Virtual On Net (VON) access versus dedicated access
- Centrex versus PBX service
  - Agency decision making
    - Centralized versus Decentralized (regional)
    - Single-tenant versus Multi-tenant buildings
- Networx versus Local Service cutovers
  - Vendor coordination
  - Agency coordination

***Leads to Standard Processes***

## PROCESS DETAILS

- What Needs To Be Done

- Inventory verification
  - Baseline and TOPS
- Fair Opportunity decision and notification
- Confirm carrier selection w/Agencies
- Notify / coordinate with local carrier

- Who Needs To Do It

- Agencies
- Agencies
- GSA Regional Transition Manager
- GSA Regional Transition Manager

## PROCESS DETAILS (cont)

- What Needs To Be Done
  - Capacity planning
  - Place orders to Networx & local carriers
  - Cutover coordination planning
  - Go / No Go decisions
  - Cutovers
- Who Needs To Do It
  - GSA Regional Transition Mgr.
  - GSA Regional Transition Mgr.
  - Agency / TCC / GSA Regional Transition Mgr.
  - Agency / TCC / GSA Regional Transition Mgr./Networx Carrier
  - GSA Regional Transition Mgr / Networx & local carriers / Agency

## PROCESS DETAILS (cont)

- What Needs To Be Done
  - Post cutover testing
  - Vendor new service assurance
  - Validate new service
  - Disconnect FTS 2001 services
- Who Needs To Do It
  - Agency / GSA Regional Transition Mgr.
  - Network Carrier
  - Agency / GSA Regional Transition Mgr.
  - FTS 2001 Carrier / Agency / GSA Regional Transition Mgr.

## WHEN DOES IT NEED TO BE DONE?

- Process starts when Agency notification is received
- GSA Regional Manager begins work with carriers
  - First 60 to 90 days
    - Verify Networkx carrier selection
    - Notify local carrier and begin capacity planning
    - Notify PBX vendor and begin capacity planning
    - Place orders to Networkx carriers and local carriers



## WHEN DOES IT NEED TO BE DONE? (cont)

- Next 30 - 60 Days
  - Begin cutover planning
  - Establish communications procedures
    - Establish communications methods and timelines with
      - Agency POCs
      - Network carrier POCs
      - Local carrier POCs
      - Switch maintenance providers or switch vendors
  - Receive order dates and begin negotiations

## WHEN DOES IT NEED TO BE DONE? (cont)

- Provisioning Intervals (see Networx J.12.3-1)
  - This interval will be determined by the amount of services planned to cut at any one location
    - Single service - refer to provisioning interval
    - Service Delivery Point (SDP) wide services for multiple users - **negotiated dates**
- Final 30 Days
  - Ongoing cutover meetings - weekly
    - Issues resolution
    - Final coordination activities - e.g. after hours access
    - Confirm vendor readiness
    - Go / No-Go decision

## WHEN DOES IT NEED TO BE DONE? (cont)

- Cutover and post-cutover
  - **First week**
    - Service and feature testing
    - Trouble resolution and reporting
  - **Next 5 weeks**
    - Network carrier administration and billing are created for new service
    - GSA Regional Transition Manager will validate services and billing with vendor
    - Disconnect orders will be placed and confirmed for legacy FTS2001 services

# COMMUNICATIONS

- Pre-cutover
  - Regional monthly cutover meetings with TCC and Agency POCs
  - Regional monthly reports posted on TCC website
    - Status of orders (by service location)
    - Status of regional environment (is everything ready)
    - Status of unresolved issues / who is responsible for resolution
  - Agency changes in carriers, dates, POCs, types of service

## COMMUNICATIONS - FREQUENCY

- Monthly status postings by region
  - First full month after all Agency decisions
  - This will change to semi-monthly within 90 days of each cutover
  - This will change to weekly within 30 days of each cutover
- Within 48 hours of major change by Agency
  - Post to TCC website

## COMMUNICATIONS – METHODS

- TCC website will be the primary method for official correspondence
- Planning and cutover meetings between regions and customers will be primarily face-to-face
  - Secondary method is video/audio conferencing
- Planning and cutover meetings with carriers will be primarily face-to-face

## AGENCY TROUBLE REPORTING

- The first escalation point is the GSA Regional Transition Manager
- Regional transition teams will coordinate with Agencies and TCC teams as needed to resolve troubles
- GSA Regional Transition Managers will open TCC Help Desk tickets to assist with trouble isolation and correction

## EXCEPTION HANDLING

- Exceptions by Agencies will be addressed on a case-by-case basis
- Schedule changes may invoke work around procedures
- GSA Regional transition teams will work with Agencies and TCC teams to establish required timelines and any procedure changes needed to support unique situations



## POTENTIAL TIMELINE IMPACTS

- Communication gaps
- Circumstances requiring re-evaluation of Agency decision
- Network and local cutovers occurring concurrently
- Resource allocations for transition activities (Agency, vendors, GSA)
- Switch grooming
- Vendor Point of Presence (POP) to Local Exchange Carrier (LEC) connections

## **AGENCY TRANSITION SUCCESS FACTORS**

- Timely decision making by Agencies
- Development of appropriate schedules
- On-going two-way communications
- Early identification of issues and timely follow-up
- On-going feedback