



PRODUCT LIFECYCLE PROCESS

INITIAL CUSTOMER SHIP (ICS) PLAN

"Beta"

Acknowledgements

The basis for the document is an ICS process produced by Marc Shapiro, the Initial Customer Shipment Process (ICS Plan portion).

This document is a work in progress and should continually undergo refinements to reflect the business and operating requirements of Procom Technologies.

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Revision Summary

Revision	Date	Revision Information/Comments
1.0	Oct 10, 2001	Initial draft for internal review
1.1	February 6, 2002	Revision and update

Overview

The Initial Customer Ship (ICS) Process is a formal program to introduce a new hardware product or feature to customers and the operational groups within Procom, in a controlled fashion. ICS is part of the Go To Market Phase of the Product Lifecycle Process. The purpose of the ICS program is to provide management and technical focus on the early installation of the new storage products or major features to allow Procom to:

- Address any technical issues with the new products as quickly as possible, and
- Ensure that all Procom processes required to deliver and support the products are in place

The controlled introduction will insure that support; spares, training, and other resources are in place to handle the new product. An ICS Program Manager will be assigned to coordinate and manage the ICS process. The ICS Program Manager is responsible for the successful completion of the ICS process. He/she will work closely with World Wide Technical Support, Product Support, and Product Management to insure support organizations have fully tested the product and are ready to support it.

Once these objectives have been achieved at a suitable number of ICS sites, the product or feature will be made more broadly available.

Key Assumptions

1. QA testing has been completed
2. Procom Performance testing has been completed
3. Product Management has determined that an ICS program is required
4. A ICS Program Manager has been assigned to coordinate and complete the ICS program

The ICS Process

ICS is a controlled test of the operation of a new product or feature in a real customer environment. The objective is to obtain feedback about the operations of the product/feature in order to maximize its benefit to our customers at General Availability, as well as to validate the product documentation and both local CS&S and Technical Support capabilities

The goals of the Initial Customer Ship program are:

- ◆ To ensure usability of documentation and ease of installation
- ◆ To ensure stable operation with customer workloads and environments
- ◆ To ensure satisfactory product performance in a customer environment
- ◆ To gather customer feedback on our implementation of the technology as input to future feature and product development
- ◆ To establish *reference* accounts before announcing General Availability

The ICS Program Team

The ICS Program Team will consist of representatives from key organizations that participate in the Phase 3 Core Team. The ICS Program Manager selects the ICS Team. Some key organizations that should participate in ICS include:

- ◆ Product Management
- ◆ Marketing
- ◆ Documentation
- ◆ Engineering Development
- ◆ Field Representation (e.g. SE Managers)

ICS Process Steps

Step 1: Identifying the Program Team and Defining the Program

The ICS Program Manager will identify the key members of the core team. The ICS team will meet to develop the initial plan for ICS. During this planning session the team will complete all the requirements to start the initial communications with the field account teams. The key activities include:

- ◆ Define the testing requirements
- ◆ Decide on the number of sites and potential geographic locations
- ◆ Develop the criteria for nominating an ICS site
- ◆ Develop a summary presentation to explain the program/requirements to the ICS candidates

Once the program is developed, the System Engineering Managers (SEM's) will publish the requirements to the System Engineers (SE's) who will be the focal point for coordinating the ICS nominations in their respective geographies.

Step 2: Solicit Nominations from the Geographic System Engineers (GSE)

The Sales account team will nominate candidates for ICS sites, but Product Management will have overall responsibility for ICS customer qualification and site selection. The criteria for selection will vary by program. The five primary criteria are listed below.

Site Nomination Check List	
<input type="checkbox"/>	ICS candidates are Procom friendly, cooperative, and technically astute. They possess a clear plan regarding the operational goals of their environment.
<input type="checkbox"/>	Candidates have a strong Procom customer relationship. They are willing to develop, test to and measure against specifications for performance and throughput in a non-production environment.
<input type="checkbox"/>	Candidates must agree to a test plan, and share the results of this test plan with Procom. They will dedicate the necessary resources (people, facilities and equipment) to complete the ICS.
<input type="checkbox"/>	Candidates agree to be flexible in working within the stated timeframe for this program.
<input type="checkbox"/>	Candidates are willing to provide written and verbal feedback to Procom.

Step 3: Review the Nominations, Select and Qualify the Candidates

Once the nominations have been submitted, the ICS Program Team will meet to review the nominations, prioritize the candidates and decide on which sites to visit. During the visit to qualify the site, the team will review the ICS process, the testing requirements, and the ICS agreements. This meeting is to set both parties' expectations and make sure the site is appropriate for ICS. The following information sets forth the major actions required to qualify ICS site.

ICS Site Qualification Check List	
<input type="checkbox"/>	Sales Operations has nominated the customer as a desirable ICS site.
<input type="checkbox"/>	The site is in a location where Product Support can support an ICS test environment
<input type="checkbox"/>	Geographic System Engineers has accepted the candidate site.
<input type="checkbox"/>	Product Management has product available to ship.

If the site meets the qualifications, it is expected that the customer will sign the appropriate agreements by the end of this step and preparations for testing can begin.

Step 4: Prepare the ICS sites for the testing

The key to a successful ICS is making sure that the customers' expectations are properly set and that local Procom resources are allocated to support the ICS sites. Once the site has been qualified, the product manager must establish local ICS teams to coordinate the actual site preparation and testing. The Product Manager or designated core team member will conduct an ICS Planning meeting for each site. The purpose of the ICS Planning Meeting is to review all aspects of the delivery, installation and support of the new product for the Customer's ICS test period. The Product manager has overall responsibility for arranging the ICS Planning Meeting.

The minimum set of attendees for the initial local planning meeting should include:

- Product Management
- Product Support
- CS&S Management or their representative (local support)
- Sales Team representative (salesman or SE)
- Support Centre or Services specialist

If necessary, other attendees may include:

- Systems Assurance (QA) representative
- Order Fulfilment
- Performance Management
- Marketing

The local ICS Planning Meeting should ideally take place 3 to 4 weeks prior to product installation to allow time to resolve any follow-on actions.

The general format of the ICS meeting agenda will be:

- H/W and S/W configurations
 - Current and planned
- Install schedule/plan
 - Delivery and Installation
 - Onsite support if required
- Customer implementation plans
 - Testing and production schedule
- Customer expectations
 - Customer acceptance/performance tests, if any
 - Specific feature tests, if any
- Fallback plans, if applicable
- Documentation
- ICS Agreement
- ICS Reporting planning

An ICS distribution list needs to be created on Outlook for each local ICS team and the core team members to include Product Management, WW Storage Support, Storage Product Support, Performance Management and QA.

A Systems Assurance Review will be conducted for each ICS candidate. The Systems Configuration Document, available on the Procom Intranet or through Product Support, will be completed in this process. Data will be compiled by the local Technical support and sales teams then reviewed by the SEM, Technical Support, and Product Marketing.

The Systems Assurance Review will provide an opportunity to identify and document expectations, work through any configuration issues, and ensure completion of installation pre-requisites. Also during this time, ICS roles and responsibilities in support of each ICS customer will be assigned.

Site Preparation Check List	
<input type="checkbox"/>	Product Support has conducted the systems assurance review with the selected customer and the local CS&S and Sales Teams have completed the Systems Assurance Document .
<input type="checkbox"/>	Product Support confirms support from CS&S and Technical Support
<input type="checkbox"/>	The site Account Team has allocated the resources needed to manage the ICS effort with the customer.
<input type="checkbox"/>	A signed ICS agreement has been provided by Sales Operations to the ICS Program Manager.
<input type="checkbox"/>	The Account Team and the customer have developed a general test plan, and Product Support and Product Management have agreed it upon.
<input type="checkbox"/>	The ICS Customer must allow Procom colleagues to participate in the testing, or at least allow Procom colleagues to closely monitor the testing

Step 5: Conducting the ICS testing & reporting

This step includes completing the actual testing and reporting the status and results to the ICS team. The ICS Program Team will estimate the schedule and time required to complete the testing. This time may differ by product and/or feature. It is estimated that the ICS program will run between 15 and 45 days.

ICS Testing

Test plan components include:

- ◆ Installability review
- ◆ Basic system connectivity
- ◆ Throughput testing
- ◆ Performance testing
- ◆ Service Action Testing
- ◆ Documentation review

ICS Reporting

A member of the local account team (CE or SE as appropriate) will be designated as the Local ICS Manager. The main responsibility of the Local ICS manager is to be the focal point for all communications between the account and other Procom departments/groups, and to provide status reporting during the ICS period.

ICS Reports will be sent via e-mail to a designated ICS distribution list. The frequency and detail required in the status reports will vary from ICS to ICS, and will be determined during the ICS Planning Meeting. The reports are intended to be management-level summaries covering the progress and main issues arising from the ICS installation. Technical problems arising during the ICS test period should be managed using Clarify in the normal way.

ICS status will be reported in four ways:

1. The Account CE will open a Clarify case upon installation of equipment. Clarify will be used to track and resolve technical and documentation issues.

2. Once a week, the ICS team will participate in a conference call to recap activities and support actions.
3. A weekly summary of events will be distributed.
4. A final ICS report will be created by the designed local ICS Manager at the end of the ICS with the customer's input.

ICS Problem Escalation and Resolution

In the event of defects or problems that may occur during the ICS, the standard CS&S escalation process will be employed. Requests for special assistance will be routed through the Technical Assistance Center.

Step 5: ICS Exit Review

At the end of each customer's ICS period an ICS Exit Review meeting will be conducted. The Product Manager will manage and record this meeting, which should include the same attendees as the original ICS Planning meeting.

The purpose of the meeting is to assess the success (or otherwise) of the customer ICS test and to record any recommendations for changes or improvements to the product or Procom processes for future installations.

Summary

The ICS program is a flexible process for introducing new products or features to the customer base in a controlled fashion, and to enable General Availability to be announced as soon as possible.

The main elements of the process and responsible functions leads are:

Stage

ICS Customer Selection
ICS Planning Meeting
ICS Reporting
ICS Exit Review

Responsibility

Product Management
Product Management
Local ICS Manager
Local ICS Manager