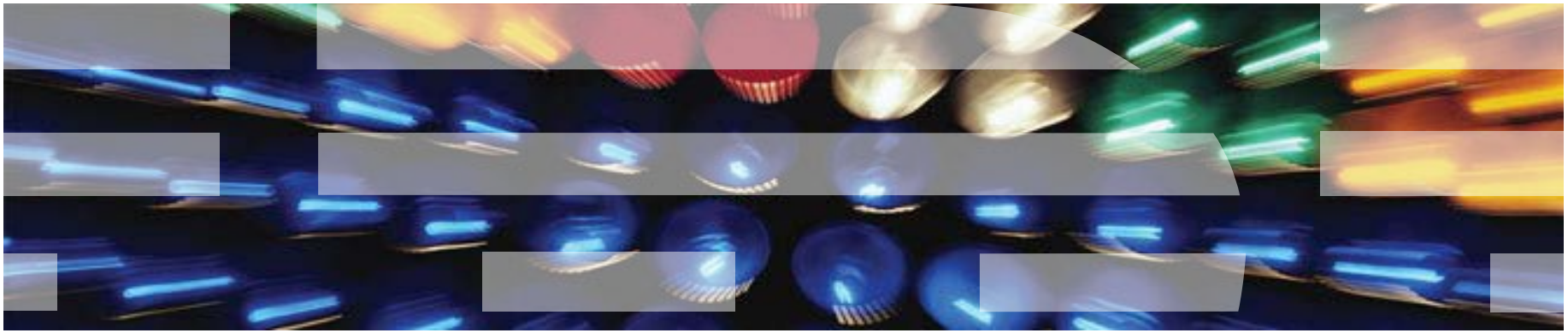
Worldwide Solution Assurance Overview

March 2020

Monique Rosales

Program Manager, North America Systems HW Technical Sales



Agenda

Solution Assurance Overview

- What is it?
- Self vs Peer vs Expert
- Pre-sale vs Pre-install
- When is a TDA Required?
- Reading the Trigger Criteria

Solution Assurance Process

Roles and Responsibilities

- SA Manager/Focal Point
- Quality Practitioner
- Sales/OO
- CTS/CTA
- SME(s)

IMPACT & Workflow

Backup Slides

Solution Assurance Overview

What is it?

The Solution Assurance (SA) Process is one of IBMs highly regarded Quality Practices. It is a differentiator.

SA focuses on getting the solution right and preparing the Client for a smooth installation. Use it as a selling point!

An ounce of Solution Assurance is worth a pound of CritSit avoidance!

The reviews are called Technical and Delivery Assessments or TDAs.

The collateral used during the TDAs are called Checklists.

Our goal is to have a happy Client with positive IBM experiences!

Solution Assurance Overview

Solution Assurance is SCALABLE.

You always want to do some form of review whether it be a Self, Peer or an Expert level review.

When a TDA is *Required* by the brands, it is an **EXPERT** level review that must be conducted, unless otherwise noted.

Business Partners, GTS and GBS are responsible for performing TDAs on their opportunities.

- They should consult with their Distributors and local IBM Systems team to see if there is assistance (free or fee-based) available locally.
- For example, a Business Partner can pay for a fee-based TDA in the US. They should contact Angela Wills @ **aywills1@us.ibm.com** to execute a contract.

Solution Assurance Overview

Self vs Peer vs Expert:

Self – Review performed by the solution designer. Results are stored locally. This level of review is only recommended when none of the Trigger Criteria for doing an Expert level review are met. And then this is appropriate when the solution has a low risk or complexity.

Peer – Review performed by a technical peer. Results are stored locally. This level of review is only recommended when none of the Trigger Criteria for doing an Expert level review are met. And then this is appropriate when the solution has a low to medium risk or complexity.

Expert – Required by the Trigger Criteria and Designated Product List. Held as a formal, independent review; conducted by a review team consisting of a Quality Practitioner and technical Subject Matter Experts (SMEs) who are all uninvolved in the solution design and the opportunity. The review team members must maintain Separation of Duties (SoD). Results are stored in IMPACT or QAWB.

Solution Assurance Overview

There are two types of TDAs and they happen at different stages in the sales cycle:

Pre-sale vs Pre-install TDAs

The Pre-sale TDA is performed after the solution design is completed, but before the final proposal is submitted to the Client and the Client agrees to purchase.

The focus of the Pre-sale TDA is on the:

- Technical assessment of the proposed design
- Client expectations, requirements and acceptance criteria
- Compatibility and Interoperability

The Opportunity Owner (OO) is responsible for ensuring that the required Pre-sale TDAs are requested and completed in a timely manner. The OO may delegate this activity to another team member but is still ultimately responsible.

Solution Assurance Overview

The Pre-install TDA is performed after the sale (usually after products have been ordered) and before the installation. The earlier, the better!

Note: Expert Pre-install TDAs are performed on IBM products and solutions that are installed by IBM. They are not performed on Client Set Up (CSU) products and most Software products.

Note: IBM Z, High End Power Systems and ESS require the completion of the TDA Confirmation Form in Resource Link or the equipment will not ship.

The focus of the Pre-install TDA is on the:

- Installation and implementation plan
- Site readiness (ex: Receiving Dock, Security Access, Electricity, Cooling, Rack Space, Network, etc.)
- Client readiness to support the product and/or solution
- Call Home and Remote Support Setup

The Opportunity Owner (OO) is responsible for ensuring that the required Pre-install TDAs are requested and completed in a timely manner. The OO may delegate this activity to another team member but is still ultimately responsible.

Solution Assurance Overview

When is a TDA Required?

The Brands, on an ongoing basis, define which products and solutions require an expert level TDA.

The General Pre-sale Trigger Criteria is published on SA332(IBM) and SA1078 (BP): IBM BP

The Systems Worldwide Trigger Criteria and Designated Product List is published on SA855: IBM BP

The Software Worldwide Trigger Criteria is published on SA331: IBM BP

Make sure you bookmark and check these websites often!

Local Business Rules: Each IBM geo can establish additional or stricter internal trigger criteria rules.

Solution Assurance Overview

Reading the Trigger Criteria for Systems

M – FICL = Mandatory when First in Client Location (based on physical address)

M – All = Mandatory for all Proposals or Orders/Installations

R – FICL and R – All are Highly Recommended

IBM Z							
Product	**Machine Type**	**Model**	**Feature Code**	**Pre-sale TDA**	**Pre-install TDA**	**OM Product Family Code**	**Checklist Location**
IBM z15 - New System	8561	T01		**M - FICL**	**M - ALL**[1]	Z15, Z15LNX	IMPACT
Upgrade from a 2964 (z13) to 8561 (z15)	2964			**M - FICL**	**M - ALL**[1]		IMPACT
Upgrade from a 3906 (z14) to 8561 (z15)	3906			**M - FICL**	**M - ALL**[1]		IMPACT

1 = Product will not ship if mandatory Pre-install TDA is not completed and confirmed in Resource Link.

Storage							
Product	**Machine Type**	**Model**	**Feature Code**	**Pre-sale TDA**	**Pre-install TDA**	**OM Product Family Code**	**Checklist Location**
System Storage DS8000							
DS8900F (DS8910F and DS8950F)	5331, 5332, 5333, 5334	993, 994, 996		R - FICL	**M - FICL**	DS8888	IMPACT
DS8900F solutions adding Copy Services (CS)	5331, 5332, 5333, 5334		8251, 8252, 8253, 8254, 8255, 8256, 8260	**M - FICL**	**M - FICL**		IMPACT
DS8900F solutions adding IBM i - iSeries Attach	5331, 5332, 5333, 5334		0931	R - FICL	**M - FICL**		IMPACT

Solution Assurance Overview

Reading the Trigger Criteria for Software

TDA Clip Levels are ACV (Annual Contract Value) for any SaaS transactions and TCV (Total Contract Value) for all other transaction types. All clip levels are shown in US Dollars. "$0K or ALL" in the clip level field indicates that a Expert level TDA is required for all opportunities regardless of contract value.

Cloud Integration					
	Product Description	**Product Code**	**Pre-sale TDA Clip Level (Worldwide)**	**Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)**	**SA Page #**
	IBM MQ on IBM Cloud (5900-A0Y)	SW/IMQIC	$100K - Expert TDA Required		IBM: SA479 BP: SA479
	Runbook Automation (SaaS) (5725-Y61, 5725-Z25)	SW/RNBK			
	SmartCloud for zLinux	SW/SCZLN			

Security Systems	**Product Description**	**Product Code**	**Pre-sale TDA Clip Level (Worldwide)**	**Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)**	**SA Page #**
Note: Clip level is based on the total value of the product family. Keep in mind this value can be calculated with one or more product codes in that family.					
Data Encryption (Guardium) = $500K					
	Multi-Cloud Data Encryption (MDE) (5737-C67)	SW/GMDE			IBM: SA1066 BP: SA1066
	Security Guardium Data Encryption (GDE) (5724-R38)	SW/IGEED			IBM: SA1066 BP: SA1066
	Guardium Data Encryption for Z (for DB2 & IMS) (5655-P03)	SW/EZDI			IBM: SA1066 BP: SA1066
Watson for CyberSecurity = $250K					
	QRadar Advisor (5737-D17)	SW/WFCS			IBM: SA479 BP: SA479

Solution Assurance Process

Step 1: OO Determines the Level and/or Type of TDA Needed

- Review the Worldwide Solution Assurance Trigger Criteria for IBM Hardware and Software products and solutions.

  - IBMers: Note that your geography may have additional requirements called Local Business Rules.

IBMer (Systems):
http://w3.ibm.com/support/assure/assur30i.nsf/WebIndex/SA855

IBMer (Software):
http://w3.ibm.com/support/assure/assur30i.nsf/WebIndex/SA331

BP (Systems):
https://www.ibm.com/partnerworld/wps/servlet/ContentHandler/salib_SA855

BP (Software):
https://www.ibm.com/partnerworld/wps/servlet/ContentHandler/salib_SA331

Solution Assurance Process

Step 2A for IBM Systems: Complete the Checklist(s) in IMPACT and Submit a TDA Request at:

https://www.ibm.com/tools/impact/

The OO or Delegate (Technical Seller or other Sales Team Member) completes the following:

1. Provides Opportunity and Client Information
2. Completes the Checklist(s)
3. Attaches Client-specific information
   - Pre-sale = configuration, sizing output, network topology, rack diagrams, client requirements, etc.
   - Pre-install = Client environmentals, installation schedule, floor plan, migration plan, etc.
4. Identifies Invitees
5. Requests the Date/Time for the Review
6. SUBMITS the TDA Request to their company Quality Practitioner.

Note: BPs are responsible for conducting TDAs on their own transactions. However, check with your local IBM Channels Team to see if there are fee-based services or assistance available in your geography.

Solution Assurance Process

Step 2A for IBM Systems: Complete the Checklist(s) in IMPACT and Submit a TDA Request (continued)

- A Business Partner TDA Request in IMPACT will route to the email address they have entered in as **their** company's Quality Practitioner (under the Review Request tab).

- The IBM TDA Request in IMPACT will route to the appropriate IBM person or group identified by the IBM geo.

- Although only one product in your solution may be on the Trigger Criteria List for a Expert Pre-sale TDA, **you must review the entire solution being proposed.**

- The Expert Pre-install TDA should consider the Client's entire environment.

Solution Assurance Process

Step 2B for IBM Software: Request the TDA

IBMers: Follow your geo's Solution Assurance Process at:
http://w3.ibm.com/support/assure/assur30i.nsf/Web/TDAreq

BPs: Follow the IBM Solution Assurance Process and utilize the IBM-provided Checklists. Use your company Quality Practitioner to conduct the review.

Note: BPs are responsible for conducting TDAs on their own transactions. However, check with your local IBM Channels Team to see if there are fee-based services or assistance available in your geography.

Step 3: The Quality Practitioner schedules the TDA

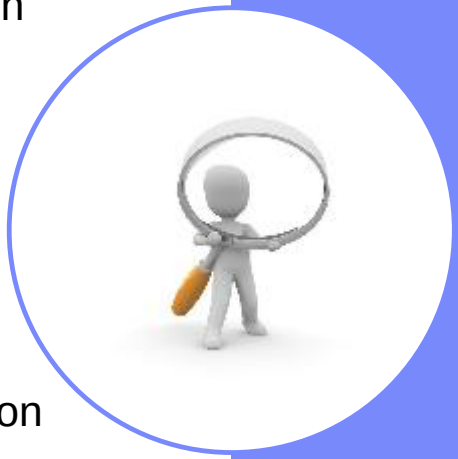
- The Solution Assurance Quality Practitioner (QP) is responsible for coordinating and scheduling the TDA with you and the SME(s).
- The QP will invite the Sales Team, Extended Sales Team and the Subject Matter Experts who can cover the major components of the solution.
- If the equipment is to be installed by IBM, an IBM SSR/CE is **required** to be a participant in the Pre-install TDA. TDAs should **not** be held if the IBM representative is not in attendance.
- The Client is optional on the Pre-sale TDA but is **required** on the Pre-install TDA. The TDA should **not** be held if the Client is not in attendance.
- For some installations, an Installation Planning Rep (IPR) may need to be involved.
- Specific Storage systems include the support of a Technical Advisor. If entitled, the Technical Advisor **must** be invited to the Pre-install TDA.

Solution Assurance Process

Step 4: Prepare for the TDA

If there are any changes or updates, the OO/Tech Salesperson needs to make sure they have provided the following information to the Quality Practitioner prior to the review:

- Most current Client-specific information
  - **Pre-sale** = configuration, sizing output, network topology, rack diagrams, Client requirements, etc.
  - **Pre-install** = install location, environmentals, installation schedule, floor plan, migration plan, etc.



Best Practice: The Quality Practitioner should send all documentation to the SMEs to review prior to the meeting.

Solution Assurance Process

Step 5: Participate in the TDA

- The QP will use the product-specific and/or general checklists as a guide for the TDA meeting.

Best Practice: When using IMPACT, the QP should conduct the review by using a video conferencing tool such as Webex, if the review is not held in person.

Step 6: Risk Assessment

- SMEs provide technical recommendations and determine the Risk Assessment (before and after action items are complete).

Step 7: Results of the TDA

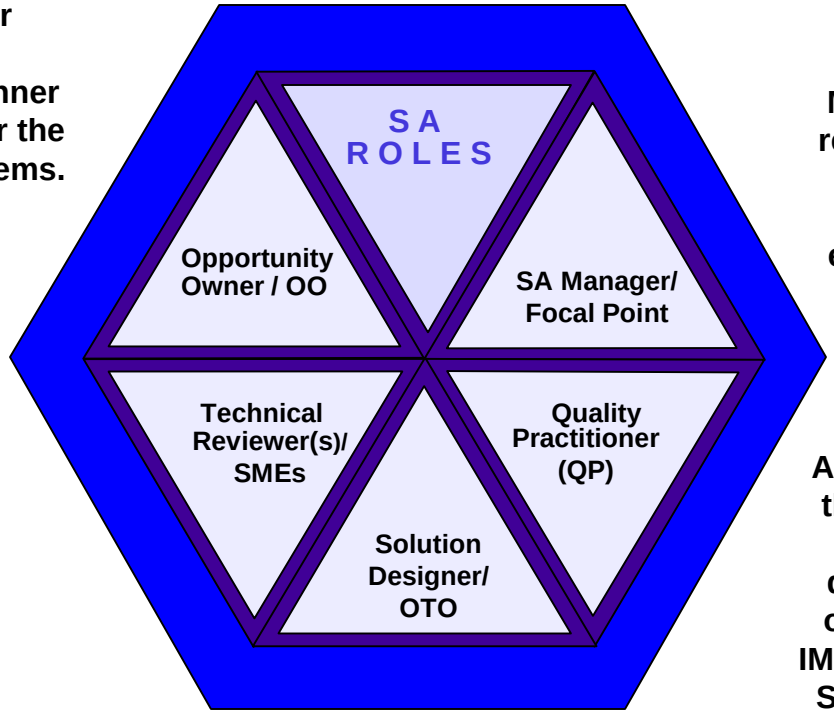
- The QP records the results for Systems in IMPACT and Software in QA Work Bench (QAWB) and distributes the results of the TDA. Note: QAWB is an IBM internal tool. For BP Software reviews, the results are stored locally.

Step 8: Completion of the Action Items

- The **Opportunity Owner** is responsible for the completion of the Action Items.

Roles & Responsibilities

Has ultimate responsibility for the success of the opportunity and the satisfaction of the Client. Responsible for ensuring all TDAs are conducted in a timely manner and is also responsible for the completion of all Action Items.



Manager or senior professional responsible for the management system and infrastructure necessary for the smooth execution of SA in the Systems and Software businesses.

Independent Technical Subject Matter Experts (SMEs) who provide expertise necessary to assess the technical viability of the solution for Pre-sale. An SME is needed for each major component of the solution or a Solution SME such as an Architect may be utilized. The SME for Pre-install TDAs must have experience in the installation of the equipment.

Responsible for the technical design of the solution. Usually a CTS, IT Specialist or Architect. Also referred to as the Opportunity Technical Owner (OTO).

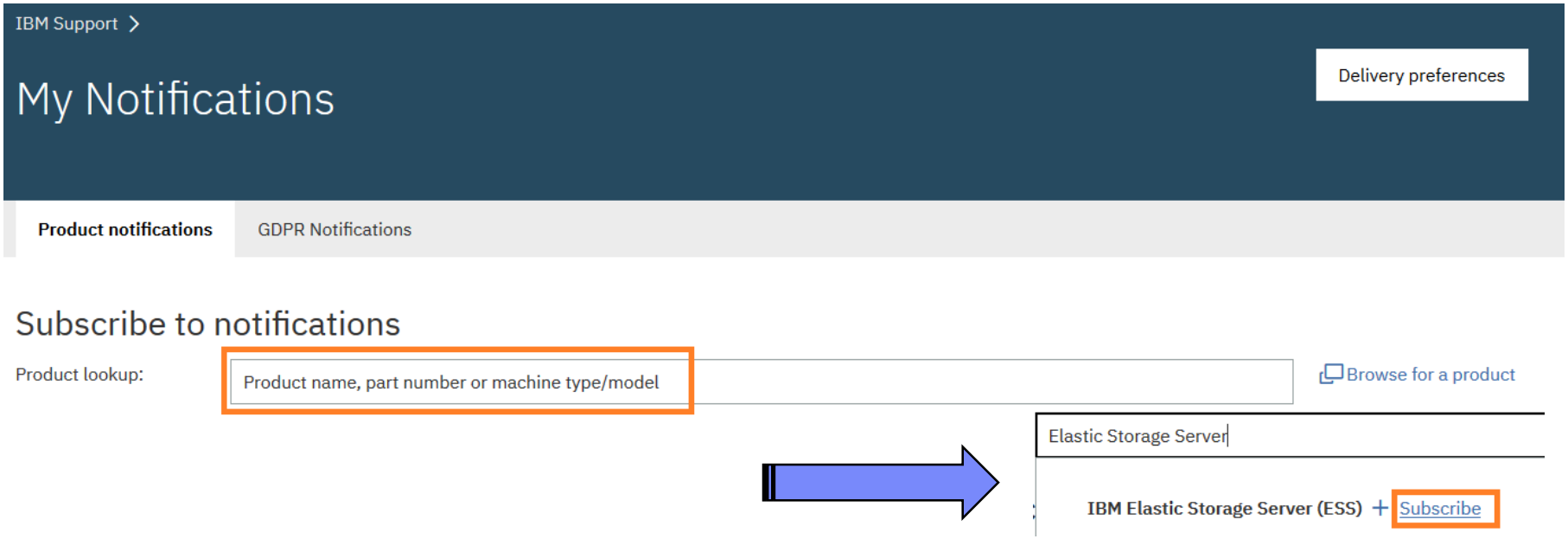
An independent, trained expert in the Solution Assurance process who chairs, facilitates and documents the expert review in one of the official repositories – IMPACT or QAWB (or locally for BP Software TDAs). May or may not be an SME. Responsible for ensuring that the proposal or installation plan is thoroughly examined and documented.

Flash Alerts for Storage, Power and IBM Z

IBM Support sends out Flash Alerts to inform Clients of issues that require their immediate attention. However, you have to subscribe to the distribution list, via My Notifications, to receive them.

Please click on the following link to subscribe: https://www.ibm.com/support/mynotifications

Enter the Product you want to be notified about and click on SUBSCRIBE.



IMPACT

IMPACT

https://www.ibm.com/tools/impact/

Help/Education

User Guide

Education Video

Feedback

Feedback

Questions:
SAAdmin@us.ibm.com

IMPACT for IBM Systems

On April 30, 2018, IBM deployed a new online Checklist Tool called **IMPACT** and re-announced on June 18, 2019. As of March 30, 2020, we have a total of 60 Checklists for IBM Systems now available in the tool.

Benefits and Value:

1) Available to IBMers and Business Partners Worldwide*.

2) Delivers user friendly web-based and interactive TDA Checklists.

3) Streamlines the process by only asking pertinent or relevant questions for completion.

4) Allows the Sales/Technical Sales user to easily attach Configurations, Drawings and other documentation.

5) Allows the User to invite a Peer or Co-worker to work on a Checklist.

6) Allows the Sales/Technical Sales User to submit a TDA Request.

7) Provides recommended action items for Quality Practitioners and SMEs.

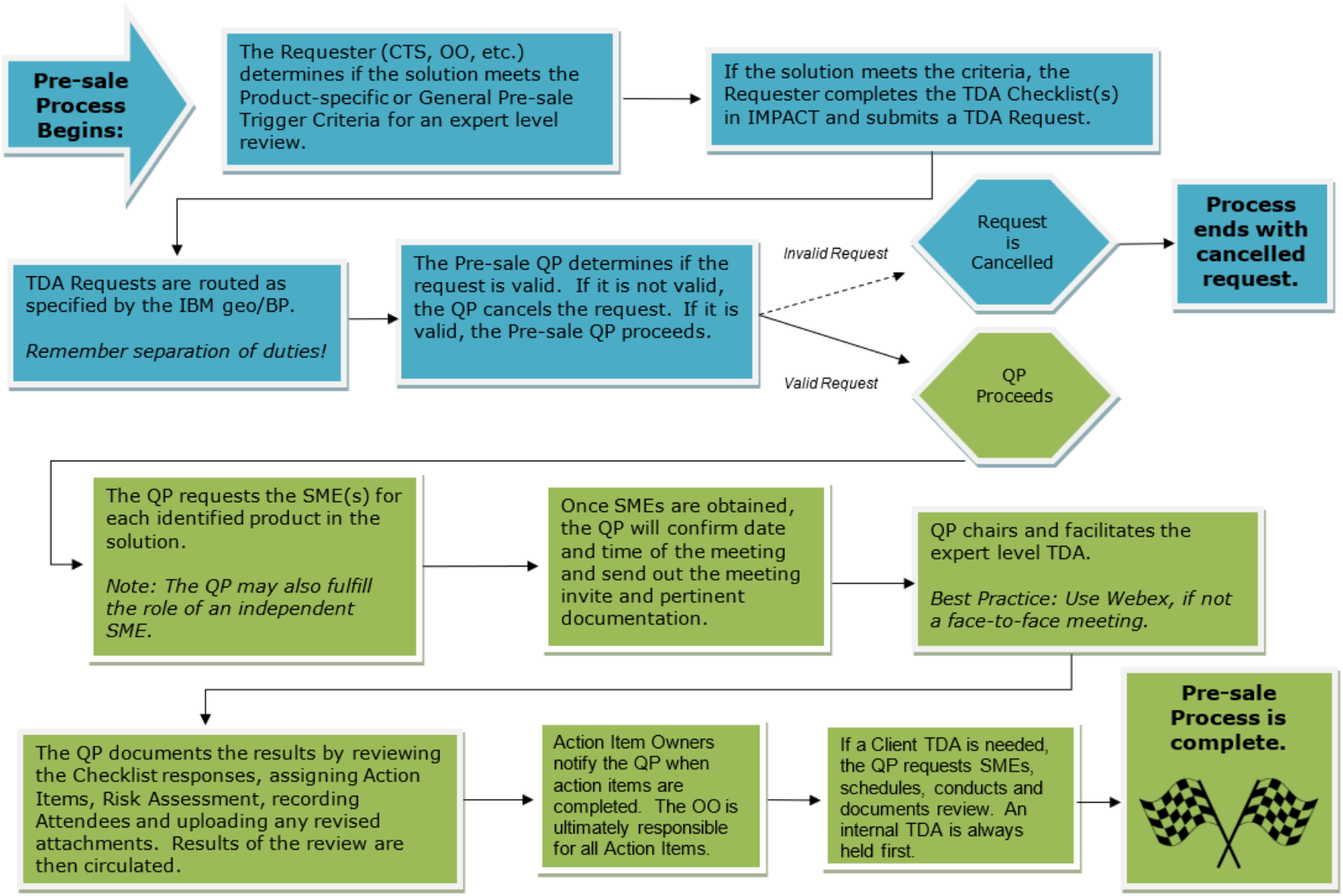
8) Generates a Summary of necessary Action Items that are needed.

9) Records the completion of a required TDA.

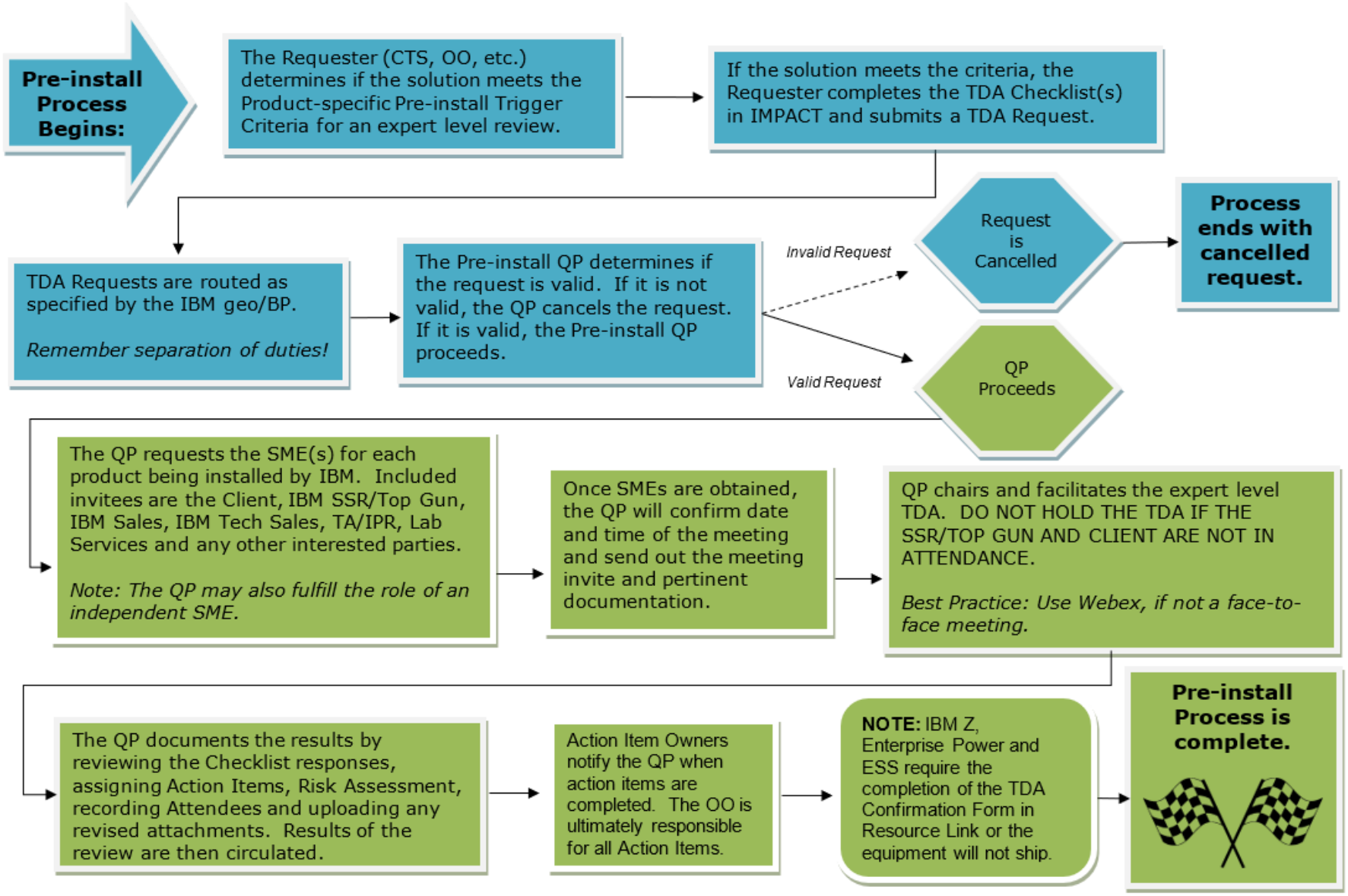
10) Securely stores the completed Checklist and the results of the TDA “In the Cloud”.

*Must have an IBMid. You must accept the Ts and Cs to use. You must be set up as a Quality Practitioner or higher level in order to see the Review Checklists button and to be able to certify a review.

Pre-sale Solution Assurance Workflow for IMPACT



Pre-install Solution Assurance Workflow for IMPACT



Backup Slides

Technical Advisor (TA) Consultant Coverage – 2020

TA consultant coverage included with Enterprise Class Support (ECS) during the product warranty period:

- TA coverage for 3-year MTMs for: **A9000/A9000R, V9000, SVC 2147, FS9100, FS9200 plus support for DS8880 (2, 3, and 4-year warranty systems that are not part of ECS)**
  - Install Assurance, Call Home enablement, ensure correct code/software level at time of initial, Storage Insights proposed and enabled
  - Client Advocacy for issues within IBM support structure
  - Change Management (code/software upgrades) planning, as required
- Limited TA support for Non-ECS products: **FlashSystem 900**
  - TA support for the 1st year only of the 3-year MTM
  - Install planning, call home enablement, initial code/software level
  - Problem Management consultation for critical issues only
  - Change Management (code/software upgrades) planning, as required

TA consultant coverage can also be purchased for all IBM Storage Products, including post warranty after TA coverage ends:

- Via TSS: Proactive Support with ESO (Enterprise Support Option)
  - Make sure you choose the ESO option for TA to be included
- Standalone TA without other TSS Proactive Support via System Lab Services

Requesting A Technical Advisor (TA)

IOT	Contact	Contact Info
North America (Canada/US) West Region	Mike Gray - Manager Bruce Spell - Team Lead	mtgray@us.ibm.com spell@us.ibm.com
North America (Canada/US) Midwest Region	Donovan Hubbart- Manager Robin Miller - Team Lead	dhubbar@us.ibm.com rmiller@us.ibm.com
North America (Canada/US) East Region	Donna Fosberry - Manager Darrell Schroat - Team Lead (Northeast) Anthony Herring - Team Lead (Southeast)	donna.fosberry@us.ibm.com schroat@us.ibm.com therring@us.ibm.com
Latin America (Brazil, Mexico, SSA)	Mike Gray - Manager Sidney Varoni Jr. - Team Lead (LA)	mtgray@us.ibm.com svaroni@br.ibm.com
Europe/Africa (BeNeLux, CEE, DACH, France, Italy, MEA, Nordics, SPGI and UKI)	Claudia Engemann-Faber - Manager Herbert Schaefer - Team Lead Neil Sondhi - Team Lead Backup	CENGEMAN@de.ibm.com HERSCHAE@de.ibm.com neil.sondhi@hu.ibm.com
Asia Pacific (Australia/NZ, ASEAN, GCG, India/South Asia, Korea)	Shiva Neiker - Manager An (Andy) Wu - Team Lead (GCG) Prasoon Sinha - Team Lead (AP)	shneiker@au1.ibm.com wuan@cn.ibm.com prasinha@au1.ibm.com
Japan	Masayuki Yokota - Manager Akitoshi Kato - Team Lead	MYOKOTA@jp.ibm.com AKATO@jp.ibm.com

Glossary of Terms

IMPACT	**Online TDA Checklist Tool for IBM Systems located at: https://www.ibm.com/tools/impact/**
Solution Assurance (SA)	**IBM Quality Practice followed by Systems, Software, Sales & Distribution (S&D) and IBM Business Partners. Solution Assurance is the process name.**
Technical and Delivery Assessment (TDA)	**Technical inspection and discussion conducted on IBM hardware and software products and solutions. The TDA is the review.**
Pre-sale TDA	**Technical review conducted on a completed solution design, prior to the delivery of a client proposal or prior to a client agreement to purchase.**
Pre-install TDA	**Technical review conducted after the client places order but before installation of the equipment or solution.**
QA Work Bench (QAWB)	**Worldwide Lotus Notes repository that is used by all IBM Quality Practices. It is an IBM internal database.**
Quality Practitioner (QP or QPer)	**Chairs and facilitates the expert review. May be an independent SME. Responsible for ensuring that the proposal or installation plan is thoroughly examined and documented. Must be independent of the Sales/Solution Design Team.**
Resource Link TDA Confirmation Form	**Certain products require that a Pre-sale and Pre-install TDA be confirmed before the order will ship. It is the responsibility of the Opportunity Owner (OO) to ensure that the review is successfully completed and confirmed with the submission of a TDA confirmation form prior to the scheduled ship date. The TDA Confirmation forms are located on the Resource Link website.**