Digital Maturity Model & Metrics Charter (R17.0)

* indicates that this field is required

<table>
<thead>
<tr>
<th>Project Name*</th>
<th>Digital Maturity Model &amp; Metrics (DMMM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IPR Mode*</td>
<td>RAND</td>
</tr>
<tr>
<td></td>
<td>Explanations of each mode is available at <a href="http://www.tmforum.org/IPRPolicy/11525/home.html">http://www.tmforum.org/IPRPolicy/11525/home.html</a></td>
</tr>
<tr>
<td>Project Start Date*</td>
<td>November 2016</td>
</tr>
<tr>
<td>Project End Date*</td>
<td>September 2017</td>
</tr>
<tr>
<td>Type of Project*</td>
<td>Development Project</td>
</tr>
<tr>
<td>Strategic Program</td>
<td>Agile &amp; IT Transformation</td>
</tr>
<tr>
<td>Previous Project Charter</td>
<td>N/A</td>
</tr>
<tr>
<td>Project Workspace Link</td>
<td>Digital Maturity Model &amp; Metrics Project Home</td>
</tr>
<tr>
<td>Project Sponsor*</td>
<td>TM Forum Collaboration Committee, Orange, others TBD</td>
</tr>
<tr>
<td>Project Team Lead*</td>
<td>Julie Hong Deloitte</td>
</tr>
<tr>
<td>TM Forum Staff Support</td>
<td>Ken Dilbeck, Robert Walker</td>
</tr>
</tbody>
</table>

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2. Project Overview

The pressure for businesses to undergo a digital transformation is greater than ever. Companies are facing both threats and opportunities in how to transform to be more digital in all facets (company strategy, innovation, customer experience, culture, operations, etc.). Despite these challenges, companies that have a clear digital strategy regularly outperform those without a cohesive digital vision.

Companies and their executive teams may not always have the necessary experience and understanding of the scale required to undergo a digital transformation, leading to incomplete or ineffective initiatives. Without guidance on what digital capabilities and drivers, organizations increase the risk of misalignment of capabilities. By leveraging the Digital Transformation Framework, we aim to create a collaborative and comprehensive framework of models and tools that enable members to strategize, assess, and evolve their digital capabilities and maturity throughout all facets of their organizations.

One of the most important works of the Forum is to provide guidelines, best practices and a platform for member and the industry at large to evolve through collaboration that establishes standard terms, frameworks, models and metrics that enable rapid, repeatable, and flexible transformation of business, operations and management platforms.

This project, TMF Digital Maturity Model and Metrics, will be developed and established based on member input, real-world experience and practice and employ a mechanism for its continuous refinement and / or evolution. The projects will collaboratively create and establish an
industry-agreed:

- Digital maturity measurable model based on member inputs.
- Digital maturity model with relevant and related metrics.
- A tool to enable DSP to self-assess and potentially participate in an industry benchmark
- Digital maturity benchmark which will be based on the digital maturity model & metrics.

The products from this project can be regularly used by members to (1) assess their degree of digitalization; and (2) enable members to benchmark their digital maturity with peers, anonymously.

All benchmarks developed will be validated based on the SAMURAI (Specified in Advance, Appropriate, Measurable, Unambiguous, Reflect current investment conditions, Accountable and Investible) properties through iterative reviews based on the learnings from the development of Frameworx, Open Digital Project, API Project, Customer Experience Management projects and any other projects current and in the future.

To begin a digital transformation, organizations need to match their future corporate strategy with the underlying digital capabilities required to execute. The Digital Strategy Framework gives organizations a structured approach to help define the future state digital vision that aligns with corporate strategy. In addition, the Framework helps guide the decision-making process to define which digital capabilities are required to deliver the corporate vision.

Digital Maturity asks how the organization is doing when it comes to digital, where they are trying to get, or where they are in relation to their competitors. The Maturity Model gives companies a tool to analyse their existing digital capabilities, determine the likely future needs of their digital environment, and identify areas for potential improvement

3. User Stories

<table>
<thead>
<tr>
<th>As a..</th>
<th>Service Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to...</td>
<td>know where I am in my digital transformation program based on a set of well-defined digital maturity model and dimensions based on global shared experiences</td>
</tr>
<tr>
<td>So that I can...</td>
<td>Address gaps in my digital maturity progress</td>
</tr>
<tr>
<td>To do this I need...</td>
<td>a well articulate digital maturity model, a series of best dimensions, guidebooks, anonymized benchmark reports, related best practices, and metrics for gauging the level I am.</td>
</tr>
</tbody>
</table>

4. Dependencies

Digital Maturity is a multi-dimensional program that requires a multi-dimensional model to deliver a true state of performance. It may cover several dimensions including customer, culture, organization, architecture, operations, network etc.

The Work done by several other projects and their work-streams around benchmarks, models and metrics may become relevant inputs or indeed become core to having a complete and integrated model at the Forum.

An initial precept of dependencies have been identified and provided in the table below. There will be the need to frequently refresh/update the table as the project progresses based on relevance now or in the future.

The following loose dependencies are identified:

<table>
<thead>
<tr>
<th>Project Name</th>
<th>INPUT FROM OUTPUT TO JOINT WITH</th>
<th>COMMENTS (describe nature of Input/Output/Joint)</th>
<th>Project Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frameworx</td>
<td>None from project team, use of published assets only</td>
<td>The DMMP model will reference the published assets either in brochurage or from the App: Metrics Mapping, Core and associated process elements; BP implementation guidelines etc;</td>
<td>Avi Talmor</td>
</tr>
<tr>
<td>Open Digital</td>
<td>None from project team, use of published assets only</td>
<td>The DMMP model will reference the published assets either in brochurage or from the App: DPRA, DSRA etc.</td>
<td>David Milham</td>
</tr>
<tr>
<td>Customer Centricity Program</td>
<td>None from project team, use of published assets only</td>
<td>The DMMP model will reference the published assets either in brochurage or from the App: Customer Experience Metrics; Analytics Big Data model</td>
<td>Robert Walker</td>
</tr>
<tr>
<td>Security &amp; Privacy</td>
<td>None from project team, use of published assets only</td>
<td>The DMMP model will reference the published assets either in brochurage or from the App: End-user trust management experience; Key trust indicators for successful digital transformation etc.</td>
<td>Chris Stock</td>
</tr>
</tbody>
</table>
5. Participants

This section identifies the human resources and skills required by the project to successfully deliver the items listed in this charter. Unless otherwise noted, the level of commitment of all project participants is Best Effort.

At the time the charter is written, the individuals listed below are considered tentative participants. When the charter is approved, the tentative participants will be notified and they can “join” the project in the online community. From that point forward the project resources will be maintained and viewable in real time.

* indicates that this is a required field or role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Name*</th>
<th>Company*</th>
<th>Confluence “@” mention</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Team Lead*</td>
<td>Julie Hong</td>
<td>Deloitte</td>
<td>Julie Hong</td>
<td></td>
</tr>
<tr>
<td>Project Co-Team Lead</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Mentor</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Sponsor*</td>
<td>Collaboration Committee</td>
<td>Orange</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant*</td>
<td><a href="https://projects.tmforum.org/wiki/display/DMMP/Project+Members">https://projects.tmforum.org/wiki/display/DMMP/Project+Members</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observer</td>
<td><a href="https://projects.tmforum.org/wiki/display/DMMP/Core+Team">https://projects.tmforum.org/wiki/display/DMMP/Core+Team</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td><a href="https://projects.tmforum.org/wiki/display/DMMP/Core+Team">https://projects.tmforum.org/wiki/display/DMMP/Core+Team</a></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Workstream Lead

- Christian Dietze (Detecon)
- Shadi Younes (Detecon)
- Chin-Gi Hong (Detecon)
- Peter William Massam (Huawei)
- Bill Davis (TCS)
- Emmanuel A. Otchere
- David Day (Deloitte)
- David Linehan (Deloitte)

Detcon
- Detecon
- Detecon
- Huawei
- TCS
- Huawei
- Deloitte
- Deloitte

Emmanuel A. Otchere

Customer
- Customer
- Customer
- Customer
- Culture, Organization, People
- Operations
- Strategy
- Strategy
Role Descriptions & Responsibilities given in section 11

6. Project Workstreams and Deliverables

The project workstreams and deliverables for this project are introduced in the sections below.

If there are multiple workstreams within this project, copy and paste the table below to create multiple instances of the table and complete it for each.

6.1. Workstream 1: DMM Deliverables

Workstream Leader:

<table>
<thead>
<tr>
<th>Ref #</th>
<th>Deliverable short name</th>
<th>Deliverable type/number</th>
<th>Description</th>
<th>Audience</th>
<th>Intended use</th>
<th>Plan for 1st 90 days</th>
<th>Plan for end of cycle</th>
<th>Sponsor / consumer support</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Digital Maturity Model</td>
<td>Guidebook</td>
<td>Provides explanation of business value and drivers. Will explain the dimensions and sub-dimensions of the model and examples of usage.</td>
<td>Consumer/users of the model. This could be at several levels within an organization</td>
<td>To gain an understanding of the model and where their organization might derive value</td>
<td>First draft available</td>
<td>Deliver as part of R17</td>
<td>Collaboration Committee and a number of CSPs</td>
<td>Work requests, dependencies, comments</td>
</tr>
<tr>
<td>1.2</td>
<td>Digital Maturity Metrics</td>
<td>Guidebook</td>
<td>This document will provide the detailed criteria for each sub-dimension and explain any rating algorithm used</td>
<td>Consumer/users of the model. This could be at several levels within an organization</td>
<td>To achieve a detailed understanding of the criteria used to establish the maturity rating</td>
<td>First draft available</td>
<td>Deliver as part of R17</td>
<td>Collaboration Committee and a number of CSPs</td>
<td></td>
</tr>
<tr>
<td>1.3</td>
<td>Digital Maturity Model &amp; Metrics Tool</td>
<td>Mobile / notepad APP</td>
<td>Presentation and collection mechanism for the model and metrics</td>
<td>People who will actually supply the answers to the survey and those analysing the results</td>
<td>To collect the information necessary to form a maturity rating for an organization</td>
<td>Requirements Developer identified</td>
<td>Deliver as part of R17</td>
<td>Collaboration Committee and a number of CSPs</td>
<td>Requires collaboration with app developers</td>
</tr>
<tr>
<td>1.4</td>
<td>Benchmarking Capability</td>
<td>Reports from data base of results</td>
<td>A mechanism that allows results collected by the app to be compared. This can be internal or external to an organization</td>
<td>Management personnel interested in understanding how their organization compares in digital maturity to similar organizations</td>
<td>Provide secure, valid comparison data for internal and external use.</td>
<td>Requirements Developer identified</td>
<td>Deliver as part of R17</td>
<td>Collaboration Committee and a number of CSPs</td>
<td>Requires collaboration with app developers</td>
</tr>
</tbody>
</table>

7. Member Validation and Feedback Approach

Deliverables require validation and feedback. If the development team has a broad range of Members and Service Providers, validation may be within the team, however if the range of Members and Service Providers is weak, after Team Approval, deliverables must be validated beyond the team. Teams must state their Member & Validation approach here:
8. Project Tooling

Indicate the tooling required for project success.

<table>
<thead>
<tr>
<th>Product</th>
<th>Key Functions</th>
<th>Needed for Project?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confluence Space</td>
<td>Document creation and publishing</td>
<td>Provided by default</td>
</tr>
<tr>
<td>JIRA Space</td>
<td>Contribution and feedback management</td>
<td>Provided by default</td>
</tr>
<tr>
<td>GitHub</td>
<td>Code repository (if applicable)</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. Liaison Relationships

Please indicate if this project has or plans to have a relationship with other External Standards Organizations (SDOs).

<table>
<thead>
<tr>
<th>Name of Organization</th>
<th>Is this a New or Existing relationship?</th>
<th>Linkages and/or Scope of work</th>
<th>Contact person</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuEST Forum</td>
<td>Existing</td>
<td></td>
<td>TBD</td>
<td></td>
</tr>
</tbody>
</table>

10. Charter History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Version</td>
<td>v. 9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Feb 28, 2018 15:59</td>
<td>Alan Pope</td>
</tr>
<tr>
<td>v. 8</td>
<td>Oct 10, 2017 14:48</td>
<td>Cecilia Ortega Lagos</td>
</tr>
<tr>
<td>v. 7</td>
<td>Oct 10, 2017 14:48</td>
<td>Cecilia Ortega Lagos</td>
</tr>
<tr>
<td>v. 6</td>
<td>Oct 10, 2017 14:47</td>
<td>Cecilia Ortega Lagos</td>
</tr>
<tr>
<td>v. 5</td>
<td>May 25, 2017 00:51</td>
<td>Emmanuel A. Otchere:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td>v. 4</td>
<td>Mar 23, 2017 13:23</td>
<td>Derek Flexer</td>
</tr>
<tr>
<td>v. 3</td>
<td>Mar 16, 2017 16:45</td>
<td>Ken Dilbeck</td>
</tr>
<tr>
<td>v. 2</td>
<td>Feb 16, 2017 19:23</td>
<td>Alicja Kawecki</td>
</tr>
<tr>
<td>v. 1</td>
<td>Feb 16, 2017 19:12</td>
<td>Alicja Kawecki</td>
</tr>
</tbody>
</table>

11. Role Definition & Responsibilities

- **Role Descriptions & Responsibilities**

  **Project Team Lead:**
  - Ensure project is developed in line with TM Forum IPR policy
  - Encourage all participants to take an active role in the project
• Ensure participants have a clear understanding of what they need to complete and when
• Drive the project team for on time delivery
• Lead the design, planning and execution validation activities
• Identify key companies required to position for industry adoption

**Mentor:**
• Aid the team to maintain focus on delivery
• Act as a source of expertise for the team
• Join project calls to assist with blockages
• Seek out expert resource to help as required
• Be a guide and link to the wider Program

**Sponsor:**
• Articulate the Industry User Story
• Act as a Champion for the team
• Review progress at six weekly intervals to ensure relevance
• Champion final deliverables at Nice/San Jose
• Drive Adoption in own organization by championing deliverables as beta versions of solutions to be developed

**Participant:**
• Develop collaborative solutions as in accordance with the developed charter and inline with Collaboration process
• Participate actively in team working meetings / sessions
• Complete tasks as agreed with the team or workstream leader

**Observer:**
• Choose to observe and monitor the progress of a project team
• Use the insights gained to share observed advancements within your organization
• Ensure planned deliverables are aligned with product roadmap in your organization to gain maximum R&D acceleration value
• Align training and education within your organization to gain maximum value of cost & risk reduction and future proofing your organization

**Reviewer:**
• All activities of observer plus…
• Review all outputs from team and provide quality timely feedback ensuring output aligns with business and technology requirements of your organization
• Participate in validation activities, these may be online or face to face.
• Monitor Collaboration Events & Activities page for all latest review activities

**Subject Matter Expert:**
• Provide support and guidance to a project team in your particular area of expertise

**Workstream Lead:**
• For your agreed workstream:
• Ensure project is developed in line with TM Forum IPR policy
• Encourage all participants to take an active role in the project
• Ensure participants have a clear understanding of what they need to complete and when
• Drive the project team for on time delivery
• Lead the design, planning and execution validation activities
• Identify key companies required to position for industry adoption

Roles specifically identified by this project:

**Core Lead** – a person willing to take on the responsibility to lead a sub-team effort to deliver the Definition, Target State, Metrics and rationale for their chosen Dimension. Time estimate of 6-8 hours per week.

Responsibilities will include either editing or arranging editor for the documentation developed.

• Ensure sub-team is developed in line with TM Forum IPR policy
• Encourage all participants of the sub-team to take an active role in the project
• Ensure sub-team participants have a clear understanding of what they need to complete and when
• Drive the sub-team for on time delivery
• Set-up and manage sub-team meetings
• Organize any necessary meetings to progress sub-team work (weekly, daily, or ad-hoc as appropriate).
• Assign sub-team responsibilities
• Manage delivery of the agreed roadmap items, specifically as applies to the project and outlined within the charter.
• Monitor progress and manage risks to and recovery of any schedule slippages
12. Legal Notice

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Morristown, NJ 07960 USA
Tel No. +1 973 944 5100
fax No. +1 973 944 5110
TM Forum Web Page: www.tmforum.org

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Core Business Subject Matter Expert – a person with specific business focused experience in a given dimension. This person should be willing to commit 2-4 hours per week actively contributing and developing material for the team.

Core Technical Subject Matter Expert – a person with specific technical focused experience in a given dimension. This person should be willing to commit 2-4 hours per week actively contributing and developing material for the team.

Committed Reviewer – this person has expertise in a given dimension or general experience developing or using maturity models and is willing to commit 1-2 hours per week participating on calls or reviewing material and providing written comments.

Other Role

Member – is a person willing to provide best effort to week participate on calls or reviewing material and providing written comments.