

APM Skills Assessment

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SERVICE ASSURANCE - APM

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Scope

A Skills Assessment is a structured interview of an existing or candidate team that has (or will have) responsibility for managing and using APM technology. We want to document the current capabilities of the team and be able to provide specific recommendations for what they should do to maintain or improve the overall capabilities of their APM practice. This Skills Assessment exercise is suitable for any type of monitoring technology and across all aspects of the application lifecycle.

Duration

A Skills Assessment may be completed in a few hours or may take a week or more, depending on the number of participants to interview. This best practice cookbook will show you what to do with your on-site time and how to summarize the findings and present recommendations.

Benefits

Completing a Skills Assessment is important to the long-term success of an APM initiative and is a valuable exercise to help you improve your relationship with the client. By examining in detail the existing skills, processes and competencies of the candidate team you will have many opportunities to communicate how a successful APM practice is established and grows. Understanding the APM lifecycle as well as the various roles that contribute APM expertise to the application lifecycle, will help your client to fully appreciate where there are, where they want to go, and what they need to accomplish in order to get there. Reliable APM Skills are often a significant gap (weakness or deficit) which you can help the customer overcome in a predictable fashion.

The main points are as follows:

- Understand the APM lifecycle
- Understand the various APM roles
- Understand how each role contributes to the collection and validation of APM information
- Understand how to define a successful program of activities that lead to a fully capable APM practice
- Understand what a fully capable application lifecycle should look like

PRE-WORK

Your Preparation

The primary reference for the assessing Skills is your own experience with APM. If you haven't participated in a large-scale deployment, or worked through all of the aspects of the APM Lifecycle, you will not be able to communicate with confidence the how and why of APM Best Practices. Assessing Skills is a delicate activity. Everyone wants to have the best possible "score" but many organizations will have significant gaps in their practices that they themselves don't have the perspective to appreciate. **Your perspective and personal experience is critical** to smoothing over this unfortunate revelation and moving deliberately to a constructive resolution of the gaps – and finding a path that leads to a more capable practice.

You also need to understand how large organizations work – or not. There is a phenomenon in the IT industry which is simply called "organization inertia". Every organization has it. You cannot hope to change it! You have to be creative in finding ways to harness this inertia and redirect it to address the gaps that you may find during the assessment. You really need to be creative and pragmatic about what you will ask the organization to consider and accomplish, in order to improve their practice. You can never be condescending or overly generous. **You must be utterly objective and fair** in order for the assessment to be successful. This takes experience so also plan to socialize your findings and recommendations with your peers to confirm your plan and presentation. This way everyone can benefit from your efforts and you get confirmation, guidance and support from the virtual team.

Setting Expectations and Scope

Hours

A Skills Assessment can be delivered over the phone in as little as 30 minutes, when you have a team that is reasonably successful with APM and you have some experience in delivering the assessment. In general, you should allow for 1-2 hours, especially if the team you are interviewing is already known to have gaps in their practice. If you have as much as 2-4 hours, then you can plan for an overview presentation as well as the interview activities.

Depending on the current capabilities and experience of the team, there are three approaches to the skills assessment. First is the "Dimensions" approach. This is to be used when the team is known to have gaps in their current capabilities or otherwise has minimal successful experience with APM technology. There are twelve dimensions that we consider for APM, which can be shortened to a critical four dimensions, if time is short. The more dimensions, the better the assessment (more comprehensive). You will also have a conversation with the team as a group as we are not interested in evaluating individuals but rather the capabilities of the organization at large.

The second method is the "Scorecard" approach and is intended for established organizations where gaps may be present but they are otherwise operating successfully with APM. This will also be a group conversation format as we are really making an effort to not single out any individuals under any circumstances. This technique was originally designed to help certify resellers and integrators of APM technology so it is extremely comprehensive. The scoring used is a little harsh but a good score is really indicative of a strong team. Weak teams will be decimated (low scores) so use the Dimensions approach if you suspect the team is weak. Otherwise, the experience will be a little disheartening.

The third method, where there is minimal or no APM experience and the intention are to support large APM initiatives, is the "Interview" approach. Here we are interview individual stakeholders, about 30-60 minutes each. We are looking more for process descriptions and understanding of what monitoring tools and reports are effective because we want to harness these 'good' practices and overload them with the considerations that will support the APM initiative, as it becomes established. We will also communicate the goals of the upcoming initiative to understand what 'fits' and what may encounter 'resistance'. A large number of stakeholders (30-60) will be interviewed and this helps to insure an accurate consensus by not relying on a small number of individuals who might not be representative of the organization at large. The result of this activity is really much more than a basic skills assessment. It needs to be this way because there are often few skills that would be appropriate anyway and highlighting that large gap is not constructive at this time. The analysis of the Interview findings actually leads back to the Dimensions technique but has the benefit of documenting specific comments, extracted from the interviews. The Interview approach requires the most experience on the part of the interviewer for this approach to be successful but results in a very reliable 'state' of affairs' and plan to insure success of the initiative.

Here is a summary of the various assessment approaches:

Assessment Type	Criteria and Level of Effort			
	Duration	Target Audience	Assessment Goal	Assessment Accuracy
Dimensions (4)	0.5 to 2 Hrs	Team Conversation	APM Lifecycle Capabilities	Good
Dimensions (12)	<ul style="list-style-type: none"> • 2-4 Hrs Simple • 2-5 days Complex 	Team Conversation, Single or Multiple Teams	APM and Application Lifecycle Capabilities	Better (simple) Best (complex)
Score Card	1-4 Hrs	Team Conversation	Certify	Better
Interview	0.5 – 1 Hr	Individual Conversation	Process and Tool effectiveness	Best
APM HealthCheck	2-4 Hrs	APM Cluster (no people)	Is the APM Environment “Correct”	Measures the Impact of Skills Gaps

TABLE 1: ASSESSMENT TYPES, CRITERIA AND LEVEL OF EFFORT

Notice that we have added a fifth assessment type, the APM HealthCheck, to provide some more contrast among the various approaches. In fact, you will often know the ‘state of affairs’ of the APM expertise because you have already completed the APM HealthCheck and found the APM environment in a ‘poor’ or otherwise unsuccessful situation. So the skills assessment is often a follow-on activity to the HealthCheck, with this effort to really document the gaps that led to the poor state of the APM Environment, and the details of how to remediate.

Note that the Dimensions technique has a Simple and Complex scoring. This will be covered in more detail during the Delivery details section. The Complex scoring indicates a score for each of Skills, Process and Competency while the Simple only scores the Skills.

Day

If you find that a full day has been set aside for the Skills Assessment, and you have a couple assessments under your belt, then you can really expect to start with an overview of the APM Best Practices, followed by two separate group discussions, an hour of prep and right into a wrap-up presentation when you can give a thumbnail of what the detailed report will have to say. But don’t expect this pace if it is your first such engagement.

Week

You can also blend in a skills assessment during a 1 week engagement, especially if you have two or more groups to engage the conversation. This allows a lot more flexibility in getting the scheduling done and, provided you have similar flexibility for the other tasks of the engagement, you can deliver a lot of value in that one week period.

Engagements that would be compatible with a skills assessment include the APM HealthCheck, APM Performance Tuning, APM Solution Sizing and Application Audit. Any of these would be able to accommodate a few hours of conversations regarding APM skills, along with the service delivery.

Couple Weeks

A Skills Assessment over a couple of weeks is most likely going to be part of an Enterprise Visibility assessment and this is largely the Individual interview activity. Scheduling 30-50 interviews, allowing 1 hour each, simply cannot be fit into a single week. You might also lose your mind at the repetition! Try instead for 2-4 per day and about 20% no-show/reschedules. Enterprise Visibility involves a number of concurrent tasks; Application Surveys, Incident Analysis,

Visibility Analysis, and Application Audits – so you will have plenty of activities to back-fill your time. Enterprise Visibility assessments take 10 weeks of which 4-6 weeks will be Interview-style conversations. This will be covered in a separate cookbook but you can find a detailed discussion of the approach, in a generic fashion, in the book “APM Best Practices”, Chapter 3.

The overall APM Assessment Practice is discussed in Chapter 3 of “APM Best Practices”. The Service Bureau presentations include LCMM-1_NEW_GENERIC_APP_and_GAP_Assessment.ppt and LCMM-3_Critical_App_Assessment.ppt. Both of these are really focused on gathering information to assist the APM Solution Sizing but since they are using the same assessment tools as would be for Enterprise Visibility, they can be of use to mentor your client teams to further assist your efforts to complete a business justification for an APM initiative. For conducting the Skills Assessments this cookbook is the primary guide as this activity is most useful during the pre-sales and post-sales support, to help set expectations for what is really necessary for a successful APM practice.

DELIVERY

Access

You want to interview anyone who will be responsible for the APM technology or will use the data it generates. This often reveals the first gap in their APM understanding – they were only thinking about the operations team! This is because most folks erroneously believe that APM is only “monitoring” – which is what operations does. In reality, you need to involve all the stakeholders in the application lifecycle in order to get the best value from the APM solution. It also helps ensure the overall success of the initiative by broadening the pool of stakeholders who will support the initiative by contributing demand, resources, expertise or funding. But they can not support the initiative if they don’t know what it will do for them. You will use the interview opportunity to make sure they understand what APM will do for their role.

Activities

In this section we will discuss how to use your time on-site. For a cursory APM Skills Assessment, half a day on-site is usually sufficient. You can also deliver this remotely, via conference call and/or webinar. After either mode of delivery, you will want to allow another half day to finalize the report (for those new practitioners) and a short meeting to deliver the findings and recommendations. My preference is always to do this in PowerPoint, which results in the shortest time for the reporting phase. PowerPoint also has one special advantage (guideline) – your recommendations should never exceed a single slide! And when you have to resort to a small font to fit them all in, and you can’t read the slide – you know you’ve got too many recommendations! Some folks prefer Word – I guess they feel a lot of pages are ‘better than a lot of slides’. Of course, if you have five days or more for the Skills Assessment a written report is usually the better choice.

Of course, depending on the type of assessment (dimensions, scorecard, or interview) you are planning to conduct, you will find some of the activities will not apply. That’s just a compromise to manage all of the assessment types in a single document, which helps insure that you will become familiar with all of them, even as you are only delivering a single type.

APM Best Practices Overview

Often it helps to begin with the end state in mind. So lay on your APM Best Practice elevator speech, leading to the definition of an “On-boarding” service catalog. This catalog covers most of the topics that an APM practice needs to consider. And as you establish the best practice ‘language’ in terms of Skills, Processes and Competencies, they will start an internal checklist of what they have, and don’t have. This ‘internal checklist’ is what you will expose during the assessment.

APM Initiative Overview

If the Best Practice concept is already in hand, then a review of the current client initiative is useful. Very often we are to coordination point for an initiative and have the responsibility to get everyone “on the same page”. I prefer to do this at every opportunity because it allows for immediate feedback (hopefully confirmation) from the participants in terms of support, interest, apathy or blocking. A lot of IT projects are politically charged and you really need to be aware of how folks are responding. Never assume that everyone knows what you are doing or why you are here! Or that something major hasn’t recently been changed – it is the nature of IT in the new millennium.

Team Conversation

The Dimensions and Scorecard techniques are undertaken with at least two participants – the more the better. It is very important to make this exercise a skills assessment of the *organization*, not the *individual*. You may track the names of the participants, to keep track of who said what but do not include them in the final report. It is too easy for management to misuse the assessment findings, especially if they are not particularly interested in the APM initiative. Our goal is only to document the current capabilities and then prescribe a path to improve them.

Each element of a Dimension or topic (Skills, Process, or Competency) in the Scorecard is really a discussion point. This is the pattern:

1. You describe the discussion point
2. You provide background, as appropriate, if they do not understand the point
3. You ask if they know of anyone who performs or supports the point
4. You ask for the names of documents or processes that are used
5. For any type of reporting, ask for an example report or screenshot

Some points will be addressed very quickly. Some will be triggers for in-depth discussion. As they are describing how they meet, exceed, fail or otherwise support or don't support – these responses are what you are scoring.

Both the Dimension and Score Card approaches are long lists of discussion points. So this can appear a little tedious. On completion, you will find a more informed client and you will have a comprehensive understanding of their current practice. Not bad for a couple hours!

The next sections will discuss some details that are unique to each assessment approach.

DIMENSION

A **Dimension assessment** aligns first on the experience with APM (Pilot, Initial, Growing, Repeatable, Mature), and then moves on to specific scoring of the Skills, Process and Competency, as time and details allow. Here is a definition of these experience terms:

- **Pilot** – Made an evaluation of a similar APM technology.
- **Initial** – Completed a first deployment and have used APM in some fashion.
- **Growing** – Completed one or more deployments and actively depend on APM information in one or more environments (DEV, QA, Pre-PROD, PROD). Some integration with other monitoring tools.
- **Repeatable** – Completed multiple deployments and actively depend on APM information in multiple environments. Significant integration and portal-like access to APM information.
- **Mature** – Multiple deployments, visibility across the full application lifecycle, significant integration with monitoring and planning tools, portal-like and mobile access to APM information.

When you are making a brief assessment or are otherwise pressed for time, you simply want to place a “1” in whichever category is most suitable.

When you have more time, and are able to gather more details about each dimension, you will assign a triplet reflecting a value for each of the Skills Processes and Competency that the team can demonstrate. Here are the definitions and scoring, generally following the idea of “Good, Better, Best”:

- Skills
 - 1: Has understanding and some experience
 - 2: Has understanding, some documented process to follow and moderate experience
 - 3: Has deep understanding, documented processes and training, extensive experience and customization
- Processes

- 1: basic installation runbook and some validation steps
- 2: Extensive runbook, preproduction review, APM capacity monitoring
- 3: Extensive runbook, pre-and postproduction reviews, APM capacity monitoring and planning, triage methodology
- Competencies
 - 1: Raid agent deployment and validation
 - 2: Application Audit and APM HealthCheck
 - 3: Agent Customization, Firefighting practice, Deployment planning

SCORE CARD

The **Scorecard** breaks out the Skills, Processes and Competencies with topics relevant to each. The scoring is a bit different and uses a scale of [None, Attempted, Repeatable, Authorized, Certified], reflecting the original design goal to evaluate and authorize/certify resellers or other 3rd parties delivering services in support of APM.

- **None:** No idea, no usage or not interested.
- **Attempted:** An idea, tried it once or twice, single practitioner
- **Repeatable:** Used to good effect, more than one person can contribute
- **Authorized:** Used to good effect, multiple practitioners, demonstrated competency
- **Certified:** Used to good effect, multiple practitioners, demonstrated competency and can train others to the same level

Reviewing Artifacts and Processes

As the interview process is somewhat casual we do want to create opportunities to review specific documents that show how folks are interacting with APM data. This is most often in the form of Run Books (for process) and Reports (an artifact of testing or triage). Since one of the larger impediments to successful APM is access to these documents (who and when), you want to pull a couple of them forward and review them for completeness. Too often a conversation can be satisfied with a ‘checkbox’ response (sure, we do that...) but if we are to make meaningful recommendations, you need to confirm if there is some ‘fire’ behind that ‘smoke’ – here is an example...

Your Question	Their Response	Response Quality
Do you use Run Books to manage your APM deployments?	Yes, we use runbooks.	Poor. For sure, somebody in their organization is using runbooks.
What is in the runbook that is specific to APM?	We include instructions to configure the agent.	Good. The instructions are present, to some degree – but what configuration are they actually deploying? Is it safe?
Does anyone review the data of when that monitoring configuration was used? Is that included in the runbook?	We have a pre-production review but they only confirm that a runbook is available. <i>Why do I need to review the monitoring configuration?</i>	Good. We have exposed a bit of process and identified a gap. Discuss excess instrumentation, high overhead configurations and inappropriate dashboards. All of this is evidenced during an APM HealthCheck.
What do you think would be better, to add monitoring validation details to the runbook, or to extend the pre-production review to validate the monitoring configuration prior to production deployment.	I think it would be easier to add it to the runbook. <i>Do you have an example? What do we have to do pre-production to validate the monitoring configuration?</i>	Excellent. They acknowledge the gap. You have improved their APM lifecycle knowledge. You have identified an activity they should target, as part of your recommendations.

<p>Can I get a copy of your current runbook to see if it will be suitable for adding the monitoring configuration validation process?</p>	<p>Yes. We would be interested to know how much work we will need to make it useful for APM. <i>Do you have anything that would show us what the technique to validate a configuration looks like?</i></p>	<p>A sample runbook covering the app server and APM is a good starting point. Basically, we need a short load test, to exercise the configuration and see how many and what type of metrics we can expect. This can be part of the normal test plan – we just need monitoring enabled before the testing starts.</p>
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When you are using the Skills Assessment as a prelude to process re-engineering this “digging around” becomes much more critical. In order to size the level of effort to get a Run Book or Testing Procedure or Training Module to be suitable for activities with APM – you have got to hold it in your hand and look at it. You have to have a conversation with the folks who maintain the doc or enforce the standards. It is also important to keep track of what docs you asked for, and what were delivered, because this is also evidence of the organizations’ readiness to participate in the APM initiative.

The worst outcome for a Skills Assessment is to be overly accommodating or generous in scoring the responses, and end up with a rating that confirms what the organization thinks of themselves, rather than evaluating the organization with respect to the best examples that we have experienced in the industry. This is what the maturity model captures, and what the artifacts will confirm, or not.

Individual Interview

Employing this technique will normally be in the context of an enterprise assessment but this can also be employed if you have a large number of candidates to interview and the group approach is not desired. This means that you will likely have a large variety of stakeholders, many of which are not going to be using APM directly. These are effectively consumers of APM information and their contribution is in explaining what types of information they want, how they get it today and what they might be interested in for the future. The interview will progress as follows:

1. You overview the scope and intent of the proposed APM initiative
2. They describe their role and where they fit in the application lifecycle
3. You ask what they know about APM and any experiences with monitoring technologies – alerting, reporting, etc.
4. They describe how they use alert information, the frequency of reporting, quality of the data
5. You continue to probe for processes around how performance information is employed

This is a very dynamic exercise. You will have a list of topics but these are more like reminders as their importance will vary depending on the stakeholder role. And you will want to take notes on whatever comes up – which frequently contain valuable insights into the organization.

You will also want to categorize each interview as a stakeholder role, which will simplify data reduction later on. Here is a list that gives good coverage:

- Application Owner
- Capacity Planning
- Developer
- Helpdesk
- Mainframe Operations
- Network
- Operations
- Performance Engineering

- QA Testing
- Security
- Systems Administration

Skills, Processes and Competencies

Breaking down an organization into skills, processes and competencies will take some practice on your part to become really efficient. The processes here, as part of the skills assessment, are designed to really drill this into you, so that it becomes 'mechanical' and 'automatic'.

Here is the 'mantra' that summarizes these terms, in terms of the good-better–best model that we employ: These are what you need to make part of your own DNA.

- **Skills**
 - GOOD – Basic product training completed
 - BETTER – Broad spectrum of skills and usage
 - BEST – Internal standards established to assess skills and provide training
- **Processes**
 - GOOD – Internal standards established
 - BETTER – Internal standards are documented
 - BEST – Internal standards are self-service (you can follow the process without assistance)
- **Competencies**
 - GOOD – You can reliably employ the activity
 - BETTER – You can consistently apply the activity, to good effect
 - BEST – You have full mastery of the activity

Data Reduction and Analysis

Reducing the data and generating appropriate recommendations is straightforward. However, there are slightly different techniques, depending on the type of assessment interview employed. There are today three approaches:

- **Graphical-Dimensions – Small Number of Interviews**
 - Best for existing practices or IT service bureaus, even if they are new to APM
- **Spreadsheet Interviews (the traditional “Skills Assessment”)**
 - Best for new customers, either struggling with their first deployments or wondering what to do next!
- **Graphical-Dimensions – Large Number of Interviews**
 - Best for major, new APM initiatives where considerable process and stakeholder teams exist but no clear plan forward to APM yet exists

Why so many choices? It is the nature of the beast. How an organization begins with APM, or restarts a struggling or failed initiative, results in a number of different entry points and a different combination of gaps in their process. You have to accommodate and document all of those factors.

GRAPHICAL-DIMENSIONS – SMALL NUMBER OF INTERVIEWS

There are (11) dimensions currently considered, of which the following (5) are essential. The more dimensions that you assess, the more accurate the assessment - thus the overall recommendations are more valuable.

During your interview, each dimension is a topic for conversation. You will make a judgment call as to how well the candidates are fulfilling that dimensions, with the following terms:

- **Pilot**
 - o An attempt was made but the topic is not in current practice.
- **Initial**
 - o An initial deployment has been made but the topic is not yet in current practice.
- **Growing**
 - o One or more deployments have been completed and there is some capability, if not full processes around the topic.
- **Repeatable**
 - o Two or more deployments have been completed and there are well-established processes around the topic.
- **Mature**
 - o Multiple groups are capable of completing deployments and configurations independently, following a unified process around the topic.

The next graphic is the table that is used. This is found in the assessment spreadsheet under the APM Dimensions tab (see `Assessment APM BP Generic JAN 2012.xls`)

Implementation	YES or NO	Pilot	Initial	Growing	Repeatable	Mature	Notes/Example
Introscope							
CEM							
EPAgent							
NetQos							
Any Monitoring Agent							
Any Agentless Technology							
Any packet filter Technology							
JMX							
APM Skills							
APM Deployment Planning and Sizing							
Any Deployment Planning and Sizing							
Rapid Deployment (see Implementation)							
Application Audit							
Performance Tuning							
Triage							
APM Roles							
Admin							
Project Manager							
Application Specialist							
Monitoring Specialist							
Architect							
Evangelist							
Visibility into the Application Lifecycle							
Unit Testing							
Functional Testing							
Performance Testing							
User Acceptance Testing (prod subset)							
Operations							
Triage Activities							
Collaboration Among Stakeholders							
Cross-silo Interactions							
Cooperation							
Acceptance Criteria							
Baselines							

Here is an example of a completed interview sheet with a preliminary analysis:

Dimension	Aware?					
	YES or NO	Pilot	Initial	Growing	Repeatable	Mature
Implementation						
Introscope	y	1	40 agents	18 cluster	1	
CEM	y		1			
EPAgent	y				1	
NetQos	y		1			
Any Monitoring Agent						
Any Agentless Technology	y				1	
Any packet filter Technology	y					
JMX	y				1	
APM Skills						
APM Deployment Planning and Sizing	y					1
Any Deployment Planning and Sizing	y					1
Rapid Deployment (see Implementation)	y		1			
Application Audit	y			1		
Performance Tuning	y				1	
Triage	y			1		
APM Roles						
Admin	y			1		
Project Manager	y			1		
Application Specialist	y			1		
Monitoring Specialist	y			1		
Architect	y			1		
Evangelist				1		
Visibility into the Application Lifecycle						
Unit Testing	y					
Functional Testing	y			1		
Performance Testing	y			1		
User Acceptance Testing (prod subset)	y			1		
Operations	y			1		
Triage Activities	y			1		

The Interviewer has gone through and noted (in RED) any obvious gaps in the practice. There are notes (redacted to protect the client) which have the details of the responses given, as well as any observations by the Interviewer. The use of the "1" is just to indicate that some capability exists. You could also make this a range [1..3] if you wanted to track the level of maturity achieved. This would be useful for a reasonably successful client but would otherwise not have much use for a struggling client.

When you are preparing a rapid wrap-up meeting, it can often be enough to simply capture this graphic and make your discussion ad-hoc.

More often, you will need a little more formal introduction (an introductory graphic) into the findings. The following graphic summarizes the Top (4) dimensions. Missing from this is the roles dimension which we handle separately. A client's misunderstanding about the APM lifecycle and necessary APM Roles is often the bulk of root cause for their poor experience and practice with APM.

APM Best Practice Dimension

APM Implementation Experience	APM Skills Foundation	Visibility into the Application Lifecycle	Collaboration Among Stakeholders
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<ul style="list-style-type: none"> • Pilot • Initial • Growing • Repeatable • Mature 	<ul style="list-style-type: none"> • Deployment Planning and Sizing • Rapid Deployment • Application Audit • Performance Tuning • Triage 	<ul style="list-style-type: none"> • Unit • Functional Performance • UAT • Operations • Triage 	<ul style="list-style-type: none"> • Cross-silo interactions • Cooperation • Acceptance Criteria • Baselines • SLAs
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- Existing tools have good visibility across the lifecycle
- Significant gaps exist in transaction and Java visibility

Basically, you take this graphic and color the maturity points RED, ORANGE or GREEN. Avoid using YELLOW because it does not stand out well. Items when they have no experience, these are colored BLACK or WHITE. Thus, for the APM Implementation experience, this client did not participate in the Pilot, but has attempted some implementation, and is otherwise only at the Initial level.

The WHITE is used when the BLACK does not offer enough contrast, as with the Collaboration dimension.

The colors of the various dimensions have no meaning other than to keep them distinct from one-another.

The next graphic is summarizing the APM Roles. Most significant here is the assignment of Client roles. There will often be some overlap in terminology, so this graphic helps to map the Client roles to the corresponding APM Role. For more details on the APM Roles, please see Chapter 4: Staffing and Responsibilities in “APM Best Practices”.

The Suitability score is considering what you have learned about the existing process that a given role will follow. We are always looking for process to “overload” – to add in the activities we need to support the APM lifecycle. Sometimes, the process will only serve as a template. Other times, we can preserve the process and add in the APM specific activities. And sometimes they already have a successful process that covers the appropriate portions of the APM lifecycle.

In addition, you can score, with ‘color’ to make greater emphasis. In this example, we have no one to monitor the APM environment and no one to help ‘sell’ the APM initiative to other application teams and business units.

		Suitability	
		0	gap
		1	should function as template
		2	best to overload existing process
		3	ready-to-go
APM Roles	Client Roles	Suitability	
Agent Administrator	BASIS Administrator	1	
EM Administrator		0	
Project Manager	Delivery Manager	2	
Application Specialist	BASIS Administrator/BASIS Manager	1	
Monitoring Specialist	BASIS Performance Analyst	1	
Architect	Application Architect	2	
Evangelist	likely the "Proposal Team"	0	

While this last graphic neatly summarizes the APM Roles and applicable Client Roles and processes, we still need to do more for the scoring of the APM practice overall.

The optimal way to achieve this is to take the various APM processes and competencies, which we already know are necessary for a successful APM practice (the 'best' practices) and score them, based on your interview results.

Again, we are focused on the process but here we must insist on aligning with the APM processes and attempt to map any suitable Client processes to them. We may also add some color coding for emphasis, and any short notes that are pertinent to the conversation.

In this example, we interviewed a group that was planning to operate APM as a service for internal customers. They already had extensive experience as an out-sourced operations practice but we planning to add a QA testing role, along with monitoring via APM. This is something you can expect to see much more of, over the next few years.

So are they ready for APM? What are their gaps? Where do they need to invest in training and/or mentoring?

APM Process	Client Process	Suitability	Suitability
Application Survey		0	0 gap
Incident Review		0	1 should function as template
Visibility Assessment		0	2 best to overload existing process
Solution Architecture and Sizing	QuickSizer	2	3 ready-to-go
Deployment Planning		1	
Pre-production Review		1	UAT is most important activity
Post-production Review		1	
APM HealthCheck		0	
Managing the APM Lifecycle (PM role)		0	
Rapid Deployment	SAP Guidebook - subset is an "accelerator"	2	
QA Test Plans		1	emphasis on functional testing, overlap with UAT
Configuration Baseline		0	
Application Visibility Baseline		0	
Transaction Definition (CEM)		0	
Request to Enhance Visibility Performance Baseline	"Early Watch"	0	
Alert Definition and Integration		1	
Dashboard Design		0	
Dashboard Validation		0	
Performance Optimization	"Expected Outcome KPIs"	1	more a change management process
Custom Tracing		0	
Advanced Configurations and Powerpacks		0	
Application Audit	"Early Watch" and "Performance-based Practice"	1	
QA Acceptance Criteria		1	
Triage	Generic Performance Guidelines	1	
Triage	Refresher/Intro Course for CA-APM	0	
Triage	"Workload Analysis"	2	
Firefighting		1	
APM Capacity Management		0	
Gap and Visibility Assessments		0	

SPREADSHEET INTERVIEW

The technique for the skills assessment (via spreadsheet) is found in APM Best Practices p 74. With the form, each question or topic is scored according to the following scale:

- 0 - None No concept or experience
- 1 - Attempted Understands concept but not in current practice
- 2 - Repeatable Understands concept and is in use to some effect. Basic processes are in cookbook form.

	Understands concept and is in use to good effect, and validated (documentation samples, incident reports, etc.). Ample documentation. Service catalog roadmap established and making progress.
3 - Proficient	Proficient and may effectively mentor to others. Has established skills testing and skills development roadmaps. Service Catalog 50% achieved.
4 - Authorized	Proficient and may both mentor individually and train groups with consistent quality results. Full internal training, skills assessment and service catalog 80-100%.
5 - Certified	

This list is also included in the spreadsheet for ready reference. A drop-down list is used to minimize typing and to keep the responses consistent for the scoring mechanism.

The spreadsheet interview takes care of the scoring which is then presented on the Summary Tab. The interview progresses by discussing a brief point of APM best practice and then asking the candidates how they satisfy that activity. The topics are broken down by Skills, Process and Competencies following the original concept of the APM maturity model, which was called the Lifecycle Capability and Maturity Model (LCMM). Each tab focused on a different aspect of the APM lifecycle: QA (LCMM-1), Pre-production (LCMM-2) and Production (LCMM-3). You will find tabs for each of these aspects.

There are also tabs for Center of Excellence (LCMM-4) and Self-service Portal (LCMM-5). You can safely ignore these as very few organizations have achieved them but you can often use them to help stakeholders understand where the APM skills, processes and competencies are leading them towards.

The **COE (Center of Excellence)** level focuses on the educational infrastructure where an organization maintains course and delivery methods to ensure that new users of APM can get to sufficient expertise with APM, for the various APM roles. This applies not only to APM practitioners but also casual users of the APM information. Few organizations realize that the real path to APM success is ready consumption of the performance data. This is ultimately what establishes value for the APM initiative, in the long-term, along with the short-term goals of improving visibility and proactive management capability.

The **Self-service Portal** level is the logical evolution for all of the process definition and various cookbooks. A self-service portal puts more of the responsibility for selecting APM technology and metrics into the hands of the end-consumer of the performance information. The APM roles then exist to support various self-service requests (instrumentation, transaction definition, triage, sizing, etc.). Education modules and competency exams, (already established in LCMM-4), guide the stakeholder through the various activities, using templates, approval chains and work orders to orchestrate a work flow to accomplish the performance management across the application lifecycle. The service catalog, developed in LCMM-1, 2 and 3 becomes the 'menu bar' for the portal application, along with the appropriate forms, calendars and status dashboards.

Almost all of your skills assessment will focus on the first three LCMM levels.

Another consideration is to accommodate where an organization is interested in moving, so we can divide the responses received into *current* and *future*. A candidate may not be doing a particular activity currently but they can see the value and can let you know immediately if it is compatible with their goals for the future. This will be important when you develop a remediation plan to enhance their current practice. You will always want to leverage the things they already accept and eventually use that to drive the other activities that will make for a more robust APM practice.

The following graphic is from the summary tab, which will do the calculations and present the results.

LCMM Level	Current Skill Level	Desired Skill Level	Current Assessment	Future Assessment
1	0	0	None	None
2	0	0	None	None
3	0	0	None	None
4	0	0	None	None
5	0	0	None	None
	0	0		

The other component of this Summary tab is then to color the result for maximum impact. The following scheme should be employed with [RED, YELLOW, ORANGE, GREEN].

Color Code			
Current			
LCMM Level	Skills	Process	Competency
	None	None	None
	Inadequate	Inadequate	Inadequate
	Gaps	Gaps	Acceptable-Emerging
	Acceptable	Acceptable	Acceptable-Consistent
	Proficient	Proficient	Acceptable-Repeatable
			Proficient

These colors are then applied, using the Fill Command, to the following table. In an actual assessment, then cells would have a term [NONE, INADEQUATE, GAPS, ACCEPTABLE, PROFICIENT]. Behind this is a numeric score. Note that the Competency column can have a few more terms which are introduced to allow a finer granularity of that dimension.

The sample coloring presents one possible result and is included just to give you an idea of what you are trying to achieve. Regrettably, It is not evident how to automate the assignment of the background color, so this is a fully manual task.

LCMM Level	Current			Future		
	Skills	Process	Competency	Skills	Process	Competency
1	None	None	None	None	None	None
2	None	None	None	None	None	None
3	None	None	None	None	None	None
4	None	None	None	None	None	None
5	None	None	None	None	None	None

Sample Color Scoring

LCMM Level	Current			Future		
	Skills	Process	Competency	Skills	Process	Competency
1	Gaps	Inadequate	Inadequate	Proficient	Proficient	Proficient
2	Inadequate	Gaps	None	Proficient	Proficient	Proficient
3	None	None	None	Acceptable	Acceptable	Gaps
4	None	None	None	Gaps	Gaps	Gaps
5	None	None	None	Gaps	Gaps	Gaps

Another feature of the skills assessment spreadsheet is that the corresponding best practice module is listed, where appropriate. This will give you a head-start on building your recommendations as any topics that are NONE-INADEQUATE-GAPS would benefit from covering this best practice topic.

Current Capability	Target Capability	Notes (Mandatory)	Score	Score	Best Practice Module	Artifact
0 - None	0 - None		0	0	LCMM 1 Baselines (skill)	Configuration Baseline
0 - None	0 - None	+	0	0	LCMM 1 Baselines (skill)	Application Baseline
0 - None	0 - None		0	0		Hierarchical Dashboards
0 - None	0 - None		0	0	LCMM 1 Baselines (skill)	Performance Baseline
0 - None	0 - None		0	0		
0 - None	0 - None		0	0	LCMM 1 QA Acceptance (process)	Application Baseline
0 - None	0 - None		0	0	LCMM 1 Quality Review and Escalation (pr	Performance Baseline
			0	0		
0 - None	0 - None		0	0	LCMM 1 Quality Review and Escalation (pr	QA Test Plan
0 - None	0 - None		0	0	LCMM 1 Baselines (skill)	QA Test Plan
0 - None	0 - None		0	0	LCMM 1 QA Acceptance (process)	QA Test Plan
0 - None	0 - None		0	0	LCMM 1 Quality Review and Escalation (process)	
0 - None	0 - None		0	0		

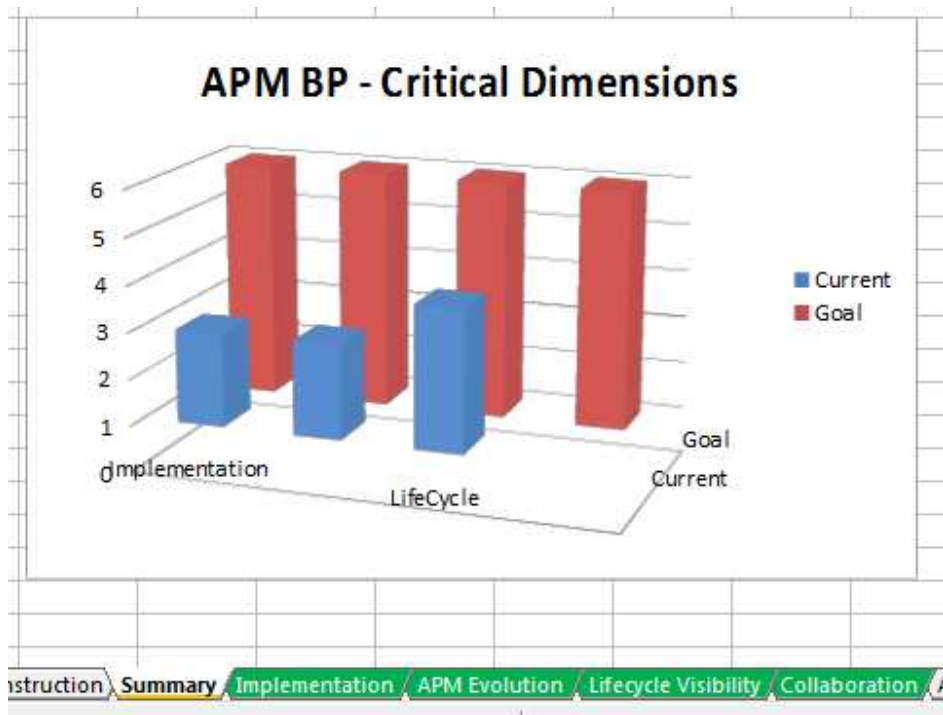
When you have a number of these modules identified, it will also be evident which form of a Service Bureau program that would provide the most comprehensive coverage of those gaps. Service Catalogs and Service Bureau Programs are currently defined for the following areas:

- **Deployment Practice**
 - o Focus on Solution Sizing, Deployment Planning and Pre-production Review
- **On-boarding Practice**
 - o Focus on Deployment, Application Audit, Dashboard, Reports and Alerting, basic triage, pre-production review
- **Triage Practice**
 - o Rapid deployment, and all triage techniques, leading to a FireFighting practice
- **QA Practice**
 - o Test Profiles, Baselines, Application Audit, Capacity Forecast

Please work with your APM Best Practice mentor to review these programs.

GRAPHICAL-DIMENSIONS – LARGE NUMBER OF INTERVIEWS

When you can cover an organization with a greater number of interviews, data reduction is essential to getting to usable recommendations. This section does the analysis automatically, *provided you have sufficient detail captured*. This results in the overview chart below, which overviews the (4) critical dimensions.



Each dimension also has a detailed chart of the Skills, Processes and Competencies, indicated by the <GREEN> tabs.

This technique could also be extended to the remaining dimensions.

The difference in this approach, as compared with the Dimensions - Small Number of Interviews, is that the number indicating the presence of a particular capability (typically "1"), is fully extended to a range of [0-4]. The definition of these values is summarized in the following table.

Assessment Element			
Overall SCORE = S*P*C			
Relative Score	Skills	Process	Competency
Best	4	4	4
Better	3	3	3
Good	2	2	2
Ineffective	1	1	1
None	0	0	0

Best – for the element being evaluated, simply the best you have seen in the industry

Better – A superior example of the element

Good – A perfectly adequate example of the element

Poor - A poor example of the element

None – No current or significant use of the element

Here each *element* (a characteristic of skills, process or competency) is considered individually. This allows a simple scoring by multiplying those numbers together. This could also allow for weighting in order to further expand the range of client behaviors – maybe something to consider for the future.

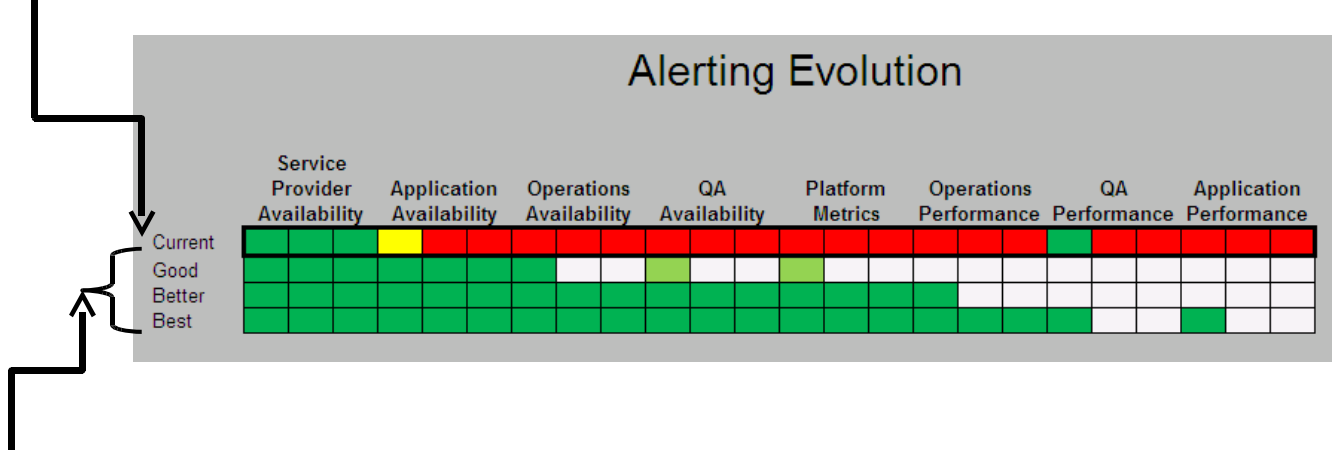
Obviously, a much greater amount of data is captured and you should expect a couple of days in interviews. The interview forms are part of the Visibility Assessment Cookbook and are not suitable for use with a stand-alone skills assessment. So a skills assessment interview depends on the Best Practice practitioner's note-taking ability and recollection.

However, as we are always striving to reduce the data reduction effort, we have also tried a technique where primary interviewer (Best Practice practitioner) is themselves interviewed by another Best Practice practitioner, in order to bring out the findings in context and enter them into the scoring spreadsheet.

If we consider a dimension in the scoring spreadsheet, as represented below, we can capture a current score in "Current" row, with a number for each of skills, processes and competencies. Each dimension has its own evolution, which need not be sequential, for a given customer. And this representation focus and a graphical construct to illustrate how 'capable' an APM organization would be if the recommended programs were achieved, depending on the Good, Better or Best goal desired.

While this graphic is interesting, it takes a lot of work to manually color in the assessed levels and cannot be automated. So this technique is reserved for the more extensive Enterprise Visibility Assessment, covered in a separate cookbook.

Current Score for Practice



Future *potential* Score for Practice, depending on the extent of the program being achieved

But if we focus on the current skills, and allow for a drop-down list of values, then this becomes a productive tool to support the “interview of the interviewer” – and dramatically increase the speed of data reduction.

In the following graphic, the row indicated by the left-facing arrow is what is filled in resulting is an easily automated presentation.

The other tables of values in the lower section of the spreadsheet are the intermediate calculations. This is just to move from the row format in to something that is easier to generate a graph with.

The size of the graph is a little small to put in all of the x-axis legends, so be sure to increase the size of you want to use this level of graphing.

Thus, each dimension can be fully summarized, provided that you have completed the interviews to expose their current capabilities in that dimension.

In current practice, it is usually sufficient to focus on the (4) critical dimensions of a successful APM practice, in order to develop a proposal and see if the client is interested in moving forward. To this you can add the roles analysis, as was done in the first version of the Dimensions assessment (small number of interviews). The remaining dimensions is presented here because it might be useful to score 1 or 2 of them, as part of the skills assessment. Otherwise, look to the Enterprise Visibility Assessment for the appropriate use of these additional dimensions.

It is not that these additional dimensions are really optional. It is more than you need a large number of interviews to correctly assess them. Very often the gaps in the organization are evident to the Best Practice practitioner, so you will have enough to do to get the organization back on track just by focusing on the (4) critical dimensions.

When you are considering a large enterprise deal, for a client that is new to APM, you need to cover all of the beneficial impacts of the APM investment. And these will go beyond what the APM team needs to be successful, and will touch on many other parts of the organization that will ultimately benefit from the APM investment. You will have to show the executive team exactly what those benefits will be. And to do that correctly, you need to fully consider the remaining dimensions and ensure you have interviewed a representative number of stakeholders.

APM Evolution

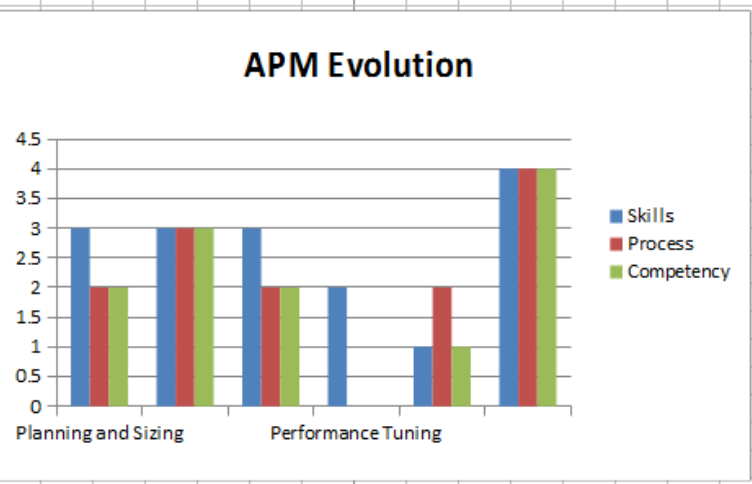
	Deployment Planning and Sizing		Rapid Deployment			Application Audit		Performance Tuning			Triage and Firefighting				
Current	3 Be	2 Go	2 Go	3 Be	3 Be	3 Be	3 Be	2 Go	2 Go	0 No	0 No	1 In	2 Go	1 In	Inadequate
Good															
Better															
Best															



Note	Reference
1	
2	
3	
4	
5	

		3	2	2	3	3	3	3	2	2	2	0	0	1	2	1
	53	12			27			12			0			2		
	5	1			1			1			1			1		

Skill	Pro	Com	Pen
Plan	3	2	2
Rap	3	3	3
App	3	2	2
Perf	2	0	0
Triag	1	2	1
Best	4	4	4



Wrap-up Meeting

A wrap-up meeting is appropriate for a couple-hour, day or week assessment. These will normally be conducted with an existing user of APM technology with at least six months operational experience.

The audience for the wrap-up meeting will often include folks who did not participate directly in the interviews and assessment. This is the audience you will be trying to reach because they will include the folks who can make a decision about going forward. You should also expect the various interview candidates to participate and this is also very important. You will have made observations and they will be the folks to directly validate that "we said that!" This is essential for overall credibility of the process. As always, DO NOT make any conclusions unless you can point to EXACTLY who said what and why.

Expect to be challenged because upper management often has a different perception of what is going on with their organization. Your presentation will challenge some of those opinions and will also introduce a new language for describing what is being done. You know that you will be making progress when they adopt this language and understand how the findings fit into the overall scheme of an APM practice.

SLIDE OUTLINE

- Agenda
- Overview the Assessment Process
- Summarize what specifically was done for this effort
- Mention any blockers or limitations that could affect the overall result
- Findings – how does the organization compare with our best APM users
- Recommendations – what needs to be done to get the organization back on track
- Next Steps
- Questions and Discussion

A more detailed example may be found in the Reporting section.

Written Report

A written report is more suitable for a larger initiative, especially if the client is new to APM. Your language, technology issues, ownership – all these topics are running through their heads – and a 1-2 hour meeting is simply not going to make a lasting impression. You have to leave them with a document that they can continue to read and make themselves familiar. They need to have traceability – on what are they basing their recommendations. This is because there will be some level of investment needed to acquire the APM infrastructure – and this is always going to be much, much more than the costs to get an APM initiative established, in terms of Skills, Processes and Competencies.

You can start by simply scripting the slides that you would produce for the wrap-up meeting (if you are to conduct one) but you will also need to include information on Solution Architecture and Solution Sizing, in order to make the document stand-alone. See the reporting section for a more detailed table of contents.

What to Look For

As you conduct the Skills Assessment, you are going to ‘see things’ – themes where you get tons of detail or absolutely nothing. What do they mean? This section will give you some starting points to consider. Of course, you should expect to see some other tools in use. An APM initiative is more than the CA tool set and you need to catalog all the tools that are currently being used, their scope and what value they bring to managing software quality. The other important part is how the tools are being used: who consumes the data, who initiates the requests for triage and visibility, who is empowered to use the tool, and who participates in the process.

Each of these themes, when present, will become a section in your presentation or report.

Tools In Use

The goal for this theme is to identify monitoring or visibility gaps and redundant technologies. Any tool that offers complementary visibility is critical to the short-term success of the APM initiative. We want to harness those tools and bring them into broader use. That may mean duplicating their reports or otherwise following their example.

Process In Use

Even a tool that is redundant may have quite mature processes associated with their use. Tools that are popular will very often have useful process associated with them. These processes may be reusable for the APM initiative or will have characteristics that we should be trying to emulate. Tools that suffer from poor adoption will usually have no significant process – which is often why they are unsuccessful. Make sure that your process suggestions don’t emulate this pattern.

Competencies

There are a number of APM Competencies that can be evaluated. These combine skills and processes into an activity that is important to the overall success in using APM technology. For organizations that appear effective with APM, focusing on the Competencies will be the most significant measure of their overall capabilities. The competencies are as follows:

- **Rapid Deployment**

- Monitoring Run Book
- **EM Health Check and APM Capacity Management**
 - Incident tracking for APM infrastructure
- **Deployment Planning**
 - Schedule for APM provisioning, APM configuration validation pre-production, incremental deployment, post-production review and acceptance
- **Solution Sizing**
 - Application Survey
 - Capacity forecast and audit of actual capacity after operational period
- **Baselines**
 - Baseline Report
 - KPIs separate from configuration information
- **Application Audit**
 - Configuration, Application and Performance Baselines
 - KPIs and alert thresholds covering Availability, Performance and Capacity
 - Hierarchal dashboards
 - Reporting
- **Performance Optimization**
 - Custom monitoring configurations involving advanced tracing
 - Structured testing of application and configuration changes with reproducible load
- **Dashboards and Reporting**
- **Pre-production Review**
- **Firefighting**
 - Structured process and presentation documenting normal and abnormal behavior
 - Rapid deployment capability with any APM technology

Example Artifacts

[...]

REPORTING

Wrap-up Presentation

The wrap-up presentation is important for not only communicating the assessment results but in providing the client with something that they can incorporate into their internal presentations. You want the client to “own” the assessment, so make it easy for them to repurpose slides by keeping backgrounds simple.

You will want to cover the following topics during your wrap-up:

Slide 1 – What was done

- Skills Assessment of EM
- Which environments (for which EM is deployed)
- Which EM servers
- Total time spend on-site

- Any impediments

Slide 2 – APM Overview

Looks like this:

APM Overview

EM	Metrics	Agents	Metric Groups	% Excessive Configurations	Dashboard Complexity and Utility, Reporting	Overall Rating
5701	147,492 •Low growth •Some decrease	65	546 •Static	30% •Metric leaks •Metric explosions •High overhead instrumentation	•Linked dashboards with thresholds •Some reporting	D-
5601	103,439 •Growing	32	129 •Static	18% •Metric leaks	•Inconsistent use •No linking •Many components inactive •No reporting	D

This is for 2 stand-alone Ems. I tend to grade rather harshly but consider the following grade scale:

A: Best EM I have ever seen. Well-balance for performance and about ____ agents capacity remaining.

- Full incident reporting
- Pre-production Review of agent configurations
- QA Tunes agent configurations prior to production

B: Pretty good. Well-balanced performance and about ____ agents capacity remaining.

- Adequate incident reporting
- Aware of agents with heavy configurations
- No agents with dangerous configurations

C: No major incidents. Within capacity but opportunities for scalability look poor.

D: No major incidents but numerous abuses and few people actually using the data (production lockdown).

F: Lots of incidents but no tracking. Manifold abuses and users are abandoning the platform.

Slide 3: Concerns

Looks like this:

Concerns

- Excessive instrumentation (5601, 5701)
- Excessive use of PMI
 - Little diagnostic value, adds overhead
- High overhead due to incorrect instrumentation (dotNet 5701)
- Incomplete visibility (5601, 5701)
- Ineffective Dashboards (5601)
- Limited use of reporting (5701 is a little better)

Just try and get all of your concerns on one slide.

Slide 4 : Recommendations

A list of what you recommend they should do to correct the problems. If you need more than a single slide, then have a slide for “Platform”, “Agent Configuration” and “Dashboarding” and divide the recommendations among them. Other categories are possible but this is the typical breakdown.

Slide 5: Details

A summary of what you observed, that led to each of your recommendations. You do not need to go over all of the details that led to your recommendations but NEVER make a recommendation that you cannot show HOW you arrived at it. For most purposes, you can treat this section as “extra slides”.

Written Report and Recommendations

Within reason, please do not recommend ANYTHING that you cannot support with a graph, screenshot, page number or spreadsheet. Written docs can come back to haunt you. If you are not sure of something, then say exactly that. If your source data is suspect or incomplete – tell them and then go ahead and do your best with it.

You will want to cover the following topics in your written report:

TABLE OF CONTENTS

- Executive Summary
 - o Summarize this document in one page
- APM Best Practice Overview
 - o What it is, how it was developed, what is the APM lifecycle, how to manage proactively
- Skills Assessment
 - o Who was interviewed, what are the findings, significant gaps
- Application Survey
 - o What applications are expected in the initial deployment, what are their general characteristics, what monitoring technology will be employed
- Solution Sizing

- How many metrics are expected, heavy and casual users, APM footprint to support this configuration, forecast of growth over (3) years
- Solution Architecture
 - Specific APM components, suggested hardware, architecture diagram
- Target Service Catalog
 - What capabilities will be introduced during the initial, growing and mature phases of the service catalog implementation
- Staffing Recommendations
 - What staff are needed, what is an appropriate organization model
- Education and Mentoring
 - Details of education and mentoring programs that would apply
- Phased Deployment Plan
 - Deployment schedule that allows for mentoring and incremental deployment of the overall APM solution

FOLLOW-ON ACTIVITIES

An APM Skills Assessment is only the first step in planning or enhancing an APM Initiative. Once a plan has been identified, it needs execution and usually involves some form of Education, Lunch-n-Learn, Mentoring and/or Services. Clients may also want organize their own program of activities, based on your recommendations. In that case you may revisit the assessment at a later date, to confirm that the client is making progress.

For significant APM Initiatives, involving additional licenses or large deployments, you may follow-up the Skills Assessment with a Visibility Assessment, Incident Analysis and APM Solution Sizing. Please see the appropriate cookbook (if available) and always refer to the planning section of APM Best Practices as how to undertake all of the activities that justify and track a larger APM Initiative.

REFERENCES

Artifacts

SAMPLE Jan 2010 -- APM-MM Report Card for CUSTOMER.doc (written report example)

Assessment APM-BP - GENERIC_JAN2012.xls (includes Dimensions and Score-card approaches)

See the "Cookbook - Visibility Assessment" for more artifacts

Presentations

APM Best Practices – Assessment Overview 2011.ppt (positioning)

Multi-dimension Assessment Practitioner Overview.ppt (overview for the practitioner)

PDFs

Gap and Visibility Assessment Overview.pdf (Client handout)

Best Practice Modules

LCMM-1_NEW_GENERIC_APP_and_GAP_Assessment.ppt

LCMM-3_Critical_App_Assessment.ppt

Books

APM Best Practices – Realizing Application Performance Management ISBN 978-1-4302-3141-7

ABOUT THE AUTHOR

Michael Sydor is an Engineering Services Architect specializing in Best Practices for APM. He advises and leads client teams to establish their own APM disciplines to deliver effective triage and manage performance across the application lifecycle. Michael is also the author of "Application Performance Management – Realizing APM", available from APress and Amazon.