M3 Playbook
Quick Start Guide

M3 Agency Implementation Playbook: Agency transitions can be challenging, but you can be successful with planning and follow-through. The M3 Playbook has **best practices** developed "by agencies for agencies," is periodically referenced by OMB and GAO, and can increase the likelihood of success during complex service & technology transitions. Learn more: https://ussm.gsa.gov/m3/#m3videos

Phase 0: Assessment

Objective: Establish vision and any business case needed to proceed.

Program Management
- ☐ 0.1 Define Vision
- ☐ 0.2 Develop Project Business Case

Phase 1: Readiness

Objective: Assess transitioning agency, define initial scope of services.

Program Management
- ☐ 1.1 Conduct a Business Readiness Assessment
- ☐ 1.2 Establish Initial Agency Program Management Office
- ☐ 1.3 Establish Customer Governance Structure and Processes
- ☐ 1.4 Establish Customer Risk Processes
- ☐ 1.5 Develop Life Cycle Cost in the Business Case
- ☐ 1.6 Define Target Performance Metrics

Workforce, Organization, and Stakeholders
- ☐ 1.7 Define Change Management Approach
- ☐ 1.8 Define Stakeholders and Develop Communications Plan

Technology
- ☐ 1.9 Define As-Is & Initial Target State Environments
- ☐ 1.10 Plan and Conduct Initial Data Quality Assessment

Process and Service Delivery
- ☐ 1.11 Develop Target State ConOps and Scope of Services
- ☐ 1.12 Review Standard Capabilities and align to Agency Needs
- ☐ 1.13 Conduct Market Research and Analysis
- ☐ 1.14 Develop Acquisition Strategy

Phase 2: Selection

Objective: Evaluate services based on agency needs, target end state.

Program Management
- ☐ 2.1 Evaluate and Select Provider for Engagement
- ☐ 2.2 Update Life Cycle Cost Estimate (LCCE)
- ☐ 2.3 Monitor and Control Program Execution
- ☐ 2.4 Maintain and Execute Risk Processes

Workforce, Organization, and Stakeholders
- ☐ 2.5 Design Workforce Outreach
- ☐ 2.6 Solidify Change Management Plan

Technology
- ☐ 2.7 Conduct Initial Data Cleansing Activities
- ☐ 2.8 Develop a Decommission Plan

Process and Service Delivery
- ☐ 2.9 Understand As-Is Business Processes

Phase 3: Engagement

Objective: Align services to agency needs and set initial target end state.

Program Management
- ☐ 3.1 Integrate Program Management Office Structures
- ☐ 3.2 Integrate Governance Structures
- ☐ 3.3 Monitor and Control Program Execution
- ☐ 3.4 Maintain and Execute Risk Processes
- ☐ 3.5 Finalize Migration Approach

Workforce, Organization, and Stakeholders
- ☐ 3.6 Engage with Workforce
- ☐ 3.7 Execute Change Management Plan
- ☐ 3.8 Establish a Training Plan

Technology
- ☐ 3.9 Finalize Requirements
- ☐ 3.10 Conduct Agency / Provider Requirements Fit-Gap Analysis
- ☐ 3.11 Finalize Target State Systems Environment
- ☐ 3.12 Develop Technical Strategy
- ☐ 3.13 Prepare Data for Mock Conversions

Process and Service Delivery
- ☐ 3.14 Finalize Target State Concept of Operations
- ☐ 3.15 Define Contact Center Structure
- ☐ 3.16 Define Service Level Agreements (SLAs)

Phase 4: Migration

Objective: Build, test, deploy new system, conops, and workforce design.

Program Management
- ☐ 4.1 Monitor and Control Program Execution
- ☐ 4.2 Maintain and Execute Risk Processes
- ☐ 4.3 Develop Operations and Maintenance (O&M) Governance
- ☐ 4.16 Assess Readiness for Go-Live

Workforce, Organization, and Stakeholders
- ☐ 4.5 Design Target State Organization
- ☐ 4.13 Execute Workforce Transition and Prepare for Go-Live
- ☐ 4.14 Execute Training for Go-Live
- ☐ 4.15 Execute Workforce Strategy

Technology
- ☐ 4.6 Conduct Security and Privacy Reviews
- ☐ 4.7 Define Roles and User Access
- ☐ 4.8 Configure Systems
- ☐ 4.9 Design and Develop Interfaces
- ☐ 4.10 Design and Develop Reports
- ☐ 4.11 Conduct Mock Conversions
- ☐ 4.12 Test Systems and Processes
- ☐ 4.17 Develop and Execute Cutover Plan for Go-Live

Phase 5: Operations | **Objective**: Deliver services, ensuring continuous optimization agency use of services.

Program Management
- ☐ 5.1 Review Performance Against Expected Benefits
- ☐ 5.2 Collect Lessons Learned
- ☐ 5.3 Implement Operations & Maintenance Governance

Workforce, Organization, and Stakeholders
- ☐ 5.4 Support Stabilization & On-going Change Management

Technology
- ☐ 5.5 Maintain Applications Post Go-Live
- ☐ 5.6 Decommission Legacy Systems

Process and Service Delivery
- ☐ 5.7 Conduct Continuous Process Improvement
- ☐ 5.8 Manage Integrated Contact Center
- ☐ 5.9 Monitor and Update Service Level Agreements (SLAs)