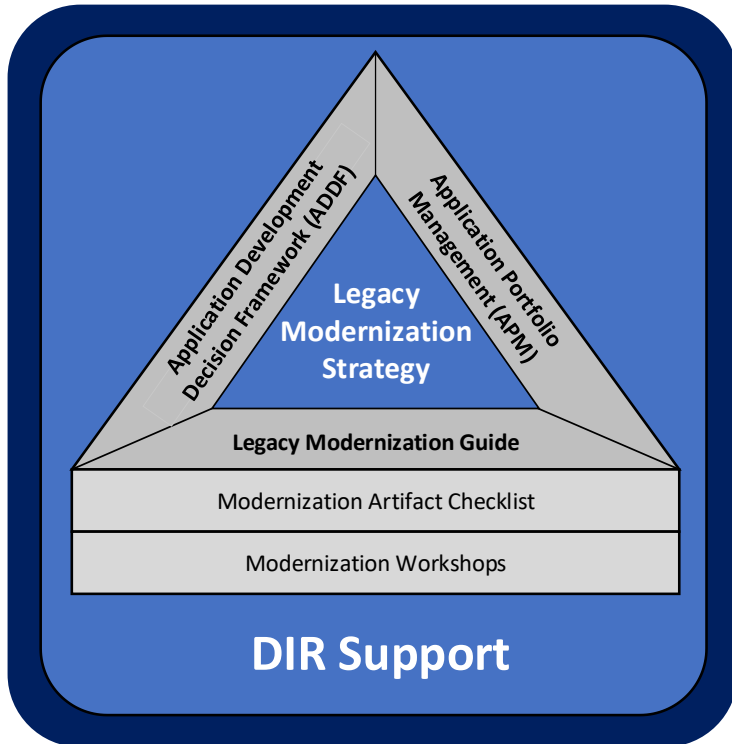# DIR Legacy Modernization Strategy and Support

Legacy Modernization Strategy

The Legacy Modernization (LM) Strategy provides a comprehensive LM package that agencies can use to conduct, track, and support their LM initiatives. The package includes a series of common artifacts, a common process (LM Guide), and common toolsets, such as the *Application Development Decision Framework (ADDF)* and *Application Portfolio Management (APM).* The LM Guide enables a consistent design and a common process that can be acted on and shared across an agency and shared with other agencies that are planning legacy modernizations.

Legacy Modernization Guide

The *LM Guide* provides guidelines, principles, best practices and references for business and information technology professionals developing a plan to modernize a legacy environment.

The LM Guide includes an approach that consists of four stages (Due Diligence, Planning & Funding, Transformation, and Production), phases, and activities which allow an agency to plan and execute a LM project successfully. Currently, the LM Guide focuses on outlining a methodology for completing the first stage (Due Diligence). The common process will enable agencies to execute a LM program with:

- **Increased Confidence**: through utilizing a structured proven approach vs. personal style
- **Reduced Risk**: through leveraging industry lessons learned to minimize delays and unify various approaches
- **Improved Return on Investment (ROI)**: through reduced cost overruns by acquiring a greater awareness of potential issues; reduced effort and cost from not having to create or acquire a methodology; reduced learning curves through reuse, cross-agency use, and shared lessons learned

Modernization Artifact Checklist

The *Artifact Checklist* is a job aid that summarizes, clarifies, and prioritizes the outputs listed in Section 3 of the LM Guide.

Artifacts are grouped by the phase to which they apply and include the purpose of the artifact. Most artifacts include a tip about creating that artifact, or where to find related information.

DIR Support and Workshops

In addition to supplying Legacy Modernization support tools (e.g., LM Guide, Artifact Checklist, ADDF), DIR provides engagement advisory support and a series of Legacy Modernization workshops. An agency-sponsored kick-off meeting is a key step in initiating the agency's modernization program and the support from DIR.

Following the Kick-Off Meeting, an agency can attend the first workshop. The workshops are primarily intended for an agency's core modernization team. These are the team members having an active role in the analysis and planning effort conducted during the critical first stage of the modernization approach – the Due Diligence Stage.

The workshops should be taken according to their numeric sequence in the series. An agency may want to spread workshop attendance over several weeks or months, depending on their ability to complete a Due Diligence phase. For example, participants would receive the most meaningful benefit from attending the Strategic Planning workshop after the core team has completed their As-Is and To-Be analyses. This would allow the team to reference their actual As-Is and To-Be artifacts during the practical exercises included in the Strategic Planning workshop.

www.dir.texas.gov/LM-Guide

Agency-Sponsored Modernization Kick-Off Meeting

- Communicate executive vision and expectations for agency's legacy modernization program
- Provide an awareness about the:
  - Legacy Modernization approach
  - Key agency roles
  - DIR's supportive role
  - Next steps

Audience: Agency executive stakeholders and LM Due Diligence Core Team leaders

### LM Workshop #1: Due Diligence Stage Overview

- DIR to provide an overview of the DIR Legacy Modernization approach for the Due Diligence stage
- DIR to show how the LM Guide is structured and what it includes
- Have participants identify their core team modernization roles and responsibilities
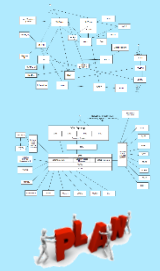
Audience: All members of agency's LM Due Diligence Core Team

### LM Workshop #2: Legacy As-Is Analysis

- DIR to show why the As-Is phase should never be shortchanged
- DIR to show how to conduct the As-Is phase using the LM Guide
- Have participants draft their agency's approach for which As-Is artifacts will be developed and by whom
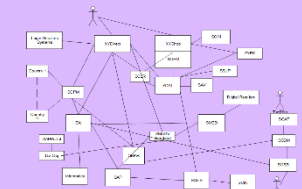
Audience: LM Due Diligence Core Team members having As-Is analysis responsibilities

LM Workshop #3: Modern To-Be Analysis

- Have participants develop a high-level target architecture
- DIR to show how to conduct the To-Be phase using the LM Guide
- Have participants draft their approach for which To-Be artifacts will be developed and by whom
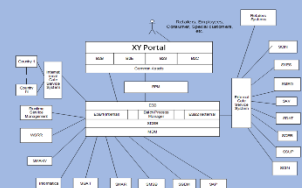
Audience: LM Due Diligence Core Team members having To-Be analysis responsibilities

LM Workshop #4: LM Strategic Planning

- Have participants develop Impact & Gap analyses
- DIR to show how to conduct the Strategic Planning phase using the LM Guide
- Have participants draft their approach for producing their Initial Implementation and Migration Plan

Audience: All members of agency's LM Due Diligence Core Team