



www.itstrategyplans.com

SOA strategy planning tool

Quick Start guide

I. About this guide

This Quick Start guide is intended to help you familiarise yourself with our SOA strategy planning tool as quickly as possible. There's a lot of information we haven't included here: this is not intended to be an exhaustive guide.

If you have further questions, please visit the tool's FAQ page, which is accessible from the **Help** tab in the main menu. If you still can't find the information you're looking for, don't hesitate to get in touch and ask us – just email your question to info@itstrategyplans.com.

Thanks for using this tool!

Kind regards,



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2. Registering and signing in

Whenever you access the tool at www.itstrategyplans.com/soa, you'll arrive at the Welcome page, shown below. The first thing you need to do is register – and once registration is complete, sign in. Until you're signed in, you can only access the Welcome and Help pages.

SOA insight: your strategy planning tool

Welcome | Assessment | Calculate & generate report | Help

Get to grips with SOA.

If you want to take practical steps toward implementing or improving an SOA initiative, you're not alone. SOA might seem like a simple idea at first sight, but to deliver real long-term and sustainable value from SOA you need to get to grips with a raft of technical, organisational and cultural issues. But the good news is that by coming here, you're starting in the right place.

Understand your competency levels.

This **free-of-charge** online tool starts with a detailed self-assessment which will guide you through six areas of competency. With the information you provide, the tool will calculate your competency levels and show you where you need to improve.

See how you compare.

When you calculate your results from your self-assessment, the tool will show you how your competency levels compare with the average benchmark - informing you how far ahead of (or behind) your competitors and peers you're likely to be.

Get targeted advice.

For a modest fee, you can purchase premium access to the tool, which enables you to download a personalised "action plan", generated based on your responses and our SOA insights and expertise. The action plan contains more detailed and personalised benchmark data, but more importantly also explains some practical actions you can take to improve your competency levels.

What's more, this isn't a one-shot opportunity. We recognise that SOA initiatives are long-term commitments and your situation and competency levels will change over time - so your premium access purchase enables you to generate and download as many

registered users sign in here:
username:
password:
[forgotten login details?](#)

If you aren't registered to use the SOA strategy planning tool yet, you can [register for free!](#)

See a sample report!

Click on the screenshot to see a sample personalised action plan report.

Click here to register as a new user.

We ask you to do register so that when you're using the tool, we can enable you to save your work securely and restore it later, and also so that if you decide to purchase an action plan report, we can personalise it just for you.

When you click on the **register for free** link, you'll be transferred to the registration page. Provide your details as requested, and the tool will email you an automatically-generated password. As the link suggests, registration costs nothing.

Once you've received your password, you can enter your username and password in the tool's Welcome page, and proceed to the self-assessment part of the tool. You can do this either by clicking on the **Assessment** tab in the menu, or following one of the "Quick links" that will be shown on the Welcome page when you're signed in.

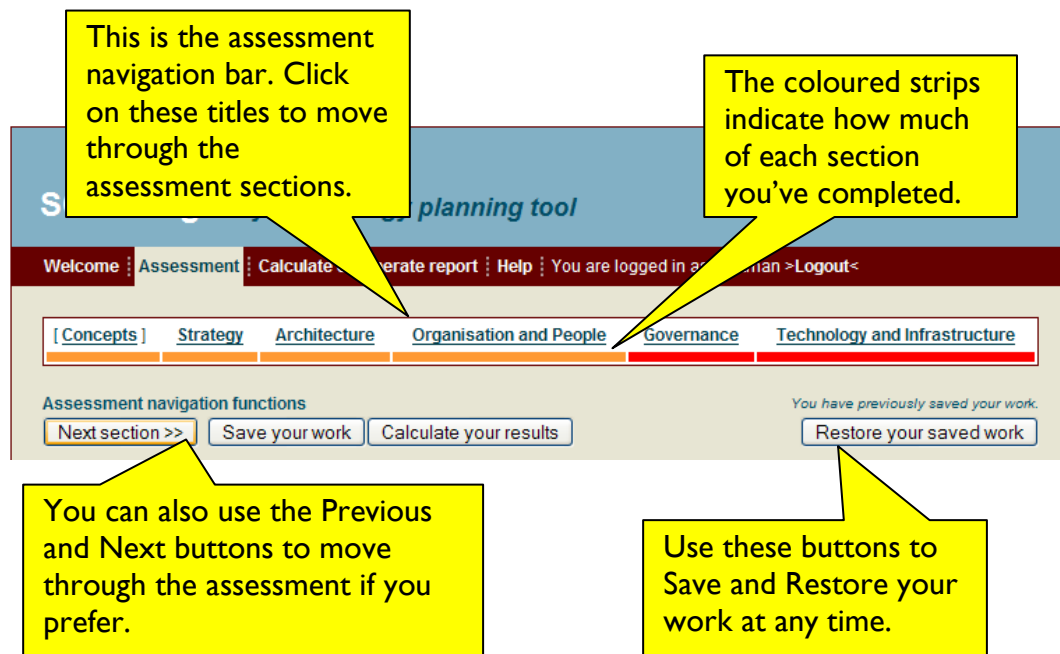
Alternatively you can quickly change your password to something more memorable (this option is accessible from the **Help** menu tab, but only if you're signed in). You can do this at any time.

3. Completing the assessment

The SOA strategy planning tool works by calculating results and recommendations from information that you provide it. The **Assessment** tab contains the self-assessment forms. The self-assessment is split into 6 sections, with each section focusing on one aspect of SOA strategy and capabilities.

Managing your work

The top of the self-assessment screen is shown below. All the information you need to manage your work in the self-assessment is here.



As you answer the questions presented in the self-assessment forms and move between assessment sections, your answers are stored in your current browser session. However if you close your browser, you will lose your work.

To retain your work so you can re-visit the tool later and continue where you left off, use the **Save** and **Restore** features of the tool. Pressing **Save** stores your work in a personal, secure file on our server. The file is retained indefinitely, and only accessible by you. The **Restore** button retrieves your work from this secure file.

IMPORTANT NOTE: each user has only one personal, secure “save file”. If you Save your work and you have already saved your work at a previous time, that previous saved work will be overwritten.

You can use the **Save** and **Restore** buttons at any point in your work on the self-assessment.

Need help?

Within each section of the self-assessment, questions are grouped into sub-sections. The tool provides context-sensitive help for each section and sub-section, which you can see by clicking on the [\[?\]](#) link next to the title for that section or sub-section.

The screenshot shows the 'SOA insight: your strategy plan' interface. At the top, there are navigation tabs for 'Concepts', 'Strategy', 'Architecture', and 'Organisational'. Below these are 'Assessment navigation functions' including 'Previous section <<', 'Next section >>', 'Save your work', and 'Calculate your results'. The main content area is titled 'Section 2. Strategy [?]' and contains two sub-sections: '2.1 Business strategy [?] [reset 2.1]' and '2.2 IT SOA strategy [?] [reset 2.2]'. Each sub-section lists several statements with a legend for response options: A (Completely agree), B (Partially agree), C (Partially disagree), and D (Completely disagree). The response options are represented by colored circles (A: green, B: yellow, C: orange, D: red). In the '2.1 Business strategy' section, the first two statements have pink backgrounds, indicating they are unanswered. The '2.2 IT SOA strategy' section also has pink backgrounds for its first two statements. Two yellow callout boxes are overlaid on the screenshot: one pointing to the '[?]' link next to 'Section 2. Strategy' with the text 'Click on a [?] link to see context-sensitive help for each set of questions.', and another pointing to the '[reset 2.1]' link next to '2.1 Business strategy' with the text 'Click on a [reset] link to clear your answers to a set of questions.'

To help you quickly see which questions you still need to answer, unanswered questions are highlighted in the tool in pink.

As shown above, if you're unhappy with the way you've answered a set of questions and want to start over, you can undo your work in a particular sub-section if you wish. Just click on the [\[reset\]](#) link next to the title of the sub-dimension you want to "clear out".

4. Calculating your results

At any time, you can move from working on the self-assessment to calculate your results. The assessment doesn't have to be complete. Obviously the picture the tool gives you will only be really accurate if you have answered every question, but we recognise that sometimes it's nice to see how you're doing part way through the process.

Clicking on the **Calculate & generate report** menu tab displays the results of your self-assessment work, as shown below.

The screenshot shows the 'SOA insight: your strategy plan' interface. The navigation bar includes 'Welcome', 'Assessment', and 'Calculate & generate report'. The main heading is 'Your assessment result'. A callout points to the 'Here are your competence levels' section, which provides a high-level overview of competency levels. Another callout points to the 'Want to know how this affects your SOA strategy?' section, which offers more information about a personalised report. A third callout points to a bar chart comparing 'Your scores' and 'Benchmark scores' across six categories: Concepts, Strategy, Architecture, Organisation and People, Governance, and Technology and Infrastructure. A fourth callout points to the 'See a sample report' section, which invites users to download a personalised action plan.

Category	Your scores	Benchmark scores
1 Concepts	48%	23%
2 Strategy	67%	33%
3 Architecture	20%	20%
4 Organisation and People	28%	25%
5 Governance	12%	15%
6 Technology and Infrastructure	57%	24%

On the left of the page the tool shows your scores, in tabular and graph form. These scores are stored with your personal profile information, so you can revisit them at any time.

On the right of the page the tool invites you to download a personalised action plan (in PDF format for you to easily save, retain and print).

5. Your personalised action plan report

Your personalised action plan report provides two additional key pieces of analysis, based on your calculated scores.

First of all, the report benchmarks your scores against those of other tool users. Three benchmarks are provided in the report summary. The first compares your scores against those of others in your industry; the second compares your scores against those of others in organisations of a similar size to yours; and the third compares your scores against those of other users in your geographical region.

Second, the report provides a detailed action plan, personalised for you based on the results of your self-assessment. Depending on your responses to the self-assessment, the report will detail up to 30 specific actions that you should consider in order to move forward with your SOA initiative in a way that will ensure success.

The self-assessment part of the tool costs nothing to use. If you want to obtain a personalised action plan report, however, you will have to purchase a premium access code.

Your premium access code authorises you to generate personalised action plan reports at any time, and as often as you like.

Download a sample report!

We have provided a sample report on the tool site, to show you an example of the kind of advice and analysis you are likely to receive. You can download the sample report (PDF) directly from the **Calculate** page and also from the **Welcome** page of the tool.

6. Obtaining your premium access code

Generating a personalised action plan requires a premium access code.

Clicking **Buy Now** from the **Calculate** page forwards you to PayPal, our online commerce service provider. The entire purchasing process is managed by PayPal. You can purchase the premium access code using a credit card or a PayPal account, if you prefer.

Using PayPal

You will arrive at an itstrategyplans.com branded PayPal payment page. First of all, choose whether you want to pay using a credit/debit card, or through a PayPal account. Then, complete the payment forms as PayPal directs.

PLEASE NOTE: If you choose to use a credit/debit card, you will not be automatically returned to itstrategyplans.com/soa. In order to continue, you will have to click on the “Return to Merchant” link shown at the bottom of the PayPal confirmation page.

Completing your purchase

On returning to itstrategyplans.com/soa, the tool will confirm the details of your purchase, and display your premium access code. For your convenience, your code will also be emailed to you. PayPal will also confirm your payment by email. If you have chosen to pay by credit/debit card, the payee details for the payment will be highlighted on your usual card statement as “PAYPAL * MWD JEMM”.

The price

A premium access code costs **200.00 GBP**. This is about the same cost as an industry seminar. With this code you can generate personalised action plan reports whenever you like, as often as you like. We commit to making the tool available for at least 12 months from launch (until June 2008), and we will update the tool as and when improvements become necessary.

If you purchase a premium access code from the UK, you will be charged VAT by PayPal at the prevailing UK rate (17.5%). If you purchase a code from outside the UK, PayPal will not add VAT to your purchase, but in line with European VAT regulations for online services, you will be liable to account for VAT on the purchase in your local country.

Purchases are made in GBP. If you choose to use a credit/debit card to purchase the premium access code and this card uses another currency, the price charged to your card will depend on currency exchange rates at the time of purchase, and any foreign currency purchase fees imposed by your card provider.