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|  | **Information Technology Services**  *ID/Access Management Worksheet* |

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| **Stage 1a: Gaze at the Pie in the Sky. Why do you want to do IAM?** | | |
| C:\Users\slake2\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OFND8JG3\MC900310148[1].wmf | **Security & Compliance** | **Business Value & Customer Support** |
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| **Stage 1b: Think about the major barriers to project success for your IAM initiative. Choose the top 3.** | |
| C:\Users\slake2\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OFND8JG3\MC900157041[1].wmf | **Barrier 1** |
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| **Barrier 2** |
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| **Barrier 3** |
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| **Stage 2a. Plan: Evaluate and assess your current situation** | | | |
| **Customers, Products, & Services** | | | |
| **Internal Customers** | | **Internal/Collection Products & Services** | |
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| **External Customers** | | **External/Individual Products & Services** | |
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| **Major Activities & Processes** | | | |
| **Inflows (Activities, Participants, & Information)** | | **Outflows (Activities, Participants, & Information)** | |
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| **Technologies & Infrastructure** | | | |
| **External Infrastructure** | **Internal IAM Infrastructure** | | **Target Infrastructure & Systems** |
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| **Stage 2b. Plan: What are the major goals and objectives you want to accomplish?** |
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| **Stage 2c. Plan to Change the Plan: What are the major barriers and risks and what is the response strategy?** |
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| **Stage 2d. Create your action plan.** |
| 1. Commence - Get Executive Support with Case and Solid Planning and Determine Scope of Project 2. Acquire – Vendor Selection 3. Implement – Get the Technical Infrastructure in Place 4. Harvest – Get Your Hands on the Data or Make Friends with Someone Who Can 5. Rationalize – Integrate the Data into a Central Repository of Key Metadata Elements 6. Decide – Map the Data to Business Roles and Requirements 7. Target – Integrate with Processes and Systems to Enforce Decisions 8. Deploy – Market, Communicate, Train, Sell, and Go Live |

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| **Stage 3. Execute Your Plan** |
| **Commence - Get Executive Support with Case and Solid Planning and Determine Scope of Project** |
|  |
| **Acquire – Vendor Selection** |
|  |
| **Implement – Get the Technical Infrastructure in Place** |
|  |
| **Harvest – Get Your Hands on the Data or Make Friends with Someone Who Can** |
|  |
| **Rationalize – Integrate the Data into a Central Repository of Key Metadata Elements** |
|  |
| **Decide – Map the Data to Business Roles and Requirements** |
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| **Target – Integrate with Processes and Systems to Enforce Decisions** |
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| **Deploy – Market, Communicate, Train, Sell, and Go Live** |
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| **Notes** |
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**References**

Alter, S. (2006). *The work system method*. (1st ed.). Larkspur, CA: Work System Press.