

---

# **Project Avila**

**Cambridge Publications, Inc.**

**Findings from the Knowledge  
Support Needs Assessment**

## Executive Summary

Client engaged CPI to assess the knowledge management needs associated with the Consortium BIMS implementation project. CPI's conclusions and recommendations are contained in this report.

### CONCLUSIONS

- The consortium's mission is to maximize production and at the same time minimize costs.
- The consortium is charged with providing thorough accountability to each of the partners and to the government of the country in which the business will operate.
- Because BIMS draws upon many decision-support applications, and because production comprises multiple locations and functions, go-live will be iterative and complex.
- The consortium must promote internally its identity as one organization, rather than as a loose amalgam of discrete entities.
- The sharing and accessibility of knowledge of every sort will be critical to the success of this project and the resulting enterprise.

### RECOMMENDATIONS

We recommend that consortium implement a comprehensive, phased knowledge support strategy. We further recommend that this knowledge support strategy be designed and implemented in conjunction with a change management strategy, which will be the principal vehicle for promoting a unified consortium identity.

This report offers a more detailed account of these recommendations.

**Table of Contents**

Project Background..... 1

The Project ..... 2

    Project Goals..... 2

    Working Assumptions ..... 2

Summary of Findings..... 3

    The Business Picture..... 3

    The BIMS Enterprise Picture..... 3

    Staff Readiness ..... 3

    What “Go-Live” Means ..... 4

    Elements of a Knowledge Support Strategy ..... 4

Conclusions..... 6

Recommendations ..... 7

    The Need: Implement a Professional Change Management Strategy ..... 7

        Defining the Critical Success Factors for an Effective Change Management Strategy ..... 7

        Recommendations for Implementing Elements of a Solution..... 8

    The Need: To Formally Conclude the Configuration Project..... 9

        Defining the Critical Success Factors for Concluding the Configuration Phase ..... 9

        Recommendations for Implementing Elements of a Solution..... 9

    The Need: Crossing the Threshold From Project to Operation ..... 10

        Defining the Critical Success Factors for an Effective Transition ..... 10

        Recommendations for Implementing Elements of a Solution..... 11

    The Need: To Continue an Effective Transition From Go-Live to Early Operation ..... 11

        Defining Critical Success Factors for an Effective Transition ..... 11

        Recommendations for Implementing Elements of a Solution..... 12

    The Need: To Establish a Framework to Support the consortium’s Growth..... 13

        Defining Critical Success Factors for Supporting Growth Safely ..... 13

        Recommendations for Implementing the Elements of a Solution ..... 14

Statement of Work..... 16

    Investigate the Requirements For the Project History ..... 16

    Investigate Index Enhancements ..... 16

    Document Each CRP ..... 17

    Assess the Effort for Porting the Process Diagrams ..... 17

    Establish a Framework for Both Users’ Groups ..... 18

    Develop a Change Management Campaign..... 18

    Define a Go-Live Operation Plan ..... 18

---

**Table of Contents**

--	--

## Project Background

The business unit of the parent company is currently engaged in implementing an enterprise-level business solution, the Business Information Management System (BIMS), within the consortium. This consortium is formed by three partners: Mobil Corporation (now Exxon Corporation), company X (the state-owned company), and VEBA OEL (a German company). Client is responsible for managing the implementation project, which bears the code name Avila. Client wishes to use the Avila project both as a showcase for its BIMS business and as a market differentiator. To handle the implementation of OneWorld, JD Edwards' ERP system, Client has partnered with Cap Gemini, an ERP implementation company.

Client has certain documentation and change management obligations. One of these is that Client is to provide consulting and guidance to the consortium in the area of "knowledge management" as pertains to customizing the product documentation for the ERP systems being implemented. Because the consortium has focused on the tactical issues of system configuration, issues related to knowledge support for system go-live have not been addressed. These issues include the type of knowledge support needed and the limitations of customizing the vendor-supplied product documentation.

Client engaged CPI to advise on fulfilling these knowledge support obligations. After a rigorous research effort, CPI recommended creating a knowledge support strategy that anticipates operational go-live needs and addresses them. CPI advised Client that they could begin to discharge their knowledge management consulting responsibilities by having a needs assessment conducted for the consortium. Client engaged CPI to conduct this knowledge support needs assessment.

## The Project

CPI conducted a series of interviews with key employees and held discussions with key operational individuals to:

- Clarify both the context of Project Avila and the key elements of a knowledge strategy
- Determine the elements that define a prudent knowledge management strategy
- Help the consortium and Client understand these elements

### PROJECT GOALS

The primary goal of the Avila Knowledge Support Needs Assessment Project (the “project”) was to identify both the foundation of a knowledge support strategy that addresses the consortium business requirement and the competencies needed to carry out the strategy. In order to accomplish this goal, three secondary goals needed to be addressed. The first was to identify the consortium enterprise-level business model; the second was to understand the role of knowledge in a successful implementation; the third was to help Client and the consortium determine whether they possessed and had available the core competencies needed to carry out a knowledge support strategy.

### WORKING ASSUMPTIONS

Initial premises:

- That JD Edwards is the primary decision-support system
- That BIMS = JD Edwards
- That the consortium is an operating organization with well-defined operations, practices, and essential staffing in place
- That BIMS go-live is to be a single event

## Summary of Findings

In the course of interviewing key individuals involved in Project Avila, CPI discovered that the operative business conditions differ significantly from those implied by the initial assumptions.

### THE BUSINESS PICTURE

the consortium is an oil production company whose prime mission is to supply synthesized crude oil at a competitive world price, which requires low-cost operations. This company has recently been formed by three partners that will share operating responsibilities and that have supplied personnel to Project Avila. Some of this staff will transfer directly to the consortium; however, most have been loaned to the consortium just for the configuration and start-up phases. Essentially, the consortium is an operation and organization under construction.

The consortium's charter includes, but is not limited to the following:

- A 35-year operating charter
- Shipment of 120,000 barrels of crude oil a day (no more, no less)
- Accurate allocation of operating costs to each partner
- Accurate allocation and delivery of synthesized crude oil to each partner
- Provision of absolute accountability for every aspect of the concern

Assuming minimum world oil prices for crude oil to be \$21 per barrel (a conservative figure), the consortium is responsible for \$2.52 million a day, or approximately \$900 million a year—*over \$31 billion over the course of its lifetime*. the consortium has enormous fiduciary responsibilities.

### THE BIMS ENTERPRISE PICTURE

BIMS functions within and affects the consortium business operations at the enterprise level in these areas:

- the consortium is using many (upwards of 20) decision-support systems to monitor and manage specific key operations
- There are three primary decision-support systems: Maximo, JD Edwards, and DCS<sup>1</sup>
- BIMS is the decision-support system backbone of the enterprise
- BIMS = the consortium business enterprise

### STAFF READINESS

Currently, the consortium staff comprises the following:

- Temporary staff loaned from the operating partners for the sole purpose of working on the configuration phase

---

1. When we presented some preliminary findings, there was some discussion of Centenella as a primary decision support system

---

## Summary of Findings

- Permanent staff hired from (contributed by) the operating partners who are working on the configuration phase
- Twelve newly hired managers (CPI does not know which operations these managers have been hired for)

the consortium has plans to hire additional staff at various levels, including entry level.

The existing staff has industry experience, which includes business practices used by each consortium partner in their own businesses. These practices are dependant on the infrastructure (which includes support staff and resources) of each of the consortium partners.

The consortium staff that stays with the consortium will have neither the consortium-specific practices (and their supporting SOPs) nor the infrastructure that this staff is used to relying upon.

### **WHAT “GO-LIVE” MEANS**

“Go-live” is a complex concept. BIMS go-live:

- Is a sequence of iterative events, rather than just one
- Is a threshold event that marks the conclusion of the configuration phase and the start of an operational or program phase

The go-live experience defines the overall perception of an implementation’s success. By managing the go-live experience and the consortium’s expectation of a go-live experience, Client can ensure that the consortium perceives Avila as a successful implementation even if additional work needs to be contracted.

### **ENSURING THAT GO-LIVE IS SUCCESSFUL**

The following four items are critical success factors for an implementation to be successful:

- An understanding of the business needs to be supported by the computer system
- Hardware and software appropriate to the business need
- An experienced system integrator
- Most importantly— the right people, properly trained and supported to run the operation

A practice-driven knowledge management program is the only way to ensure having the right people, properly trained. Implementation plans for a knowledge management program can be created to address the immediate-, near-, medium-, and long-term.

### **ELEMENTS OF A KNOWLEDGE SUPPORT STRATEGY**

CPI presented Client with a full spectrum of components that can comprise an effective knowledge support strategy. See Appendix A for these materials. During discussions with key personnel from the Project Avila team, the need to define and institute operational controls on key business processes was raised as a critical concern. Defining

---

## Summary of Findings

practice based on the actual needs of the consortium's organization and operations is vital to development of the standard operating procedures that will deliver operational controls.

## Conclusions

The magnitude of the consortium's fiduciary responsibilities, as represented in the crude oil commitments (more than *\$31 billion-worth over the course of its lifetime*) and the accompanying accountability issues, cannot be overstated. Even in the early stages of operation, the consortium's fiduciary responsibilities, as represented by a day's crude oil commitment (on the order of *\$2.52 million*), cannot be overstated. CPI designs solutions to meet business goals. These solutions take into account the risk factors inherent in project requirements or resulting from project circumstances.

The difference between goals and requirements is one source of risk. When reality and requirements are at odds, decision-makers arrive at trade-offs. These trade-offs have an impact, either on achieving business goals or on satisfying project requirements. The best solution incorporates trade-offs intelligently arrived at, with all parties understanding the impact.

Because the consortium is an operation and organization under construction, the following have yet to be defined or identified:

- The operations that provide the most exposure to risk, either for the ability to deliver a day's commitment of crude oil, or the ability to properly account for it
- The time at which those operations are expected to become fully accountable and operational
- The exposure of those operations to down-time resulting from lack of formally defined the consortium-specific business practices
- The exposure of those operations to human error resulting from inadequate attention to knowledge management
- Acceptable risk exposure

For minimizing risk exposure, the principal success factor is preparedness. For maximizing preparedness, the principal success factor is implementation of a practice-based knowledge management plan.

Certain events are major operational milestones in the consortium's evolution. Each carries its own risk exposure:

1. Conclusion of the configuration project (Project Avila)
2. Go-live: crossing the threshold from Project Avila to early operations
3. Post go-live operations: continuing an effective transition from go-live to early operation
4. the consortium-staff operations: establishing a framework that supports growth

All of these milestones are affected by practice and knowledge. In each case, the consortium can limit risk exposure by providing solid knowledge support—just-in-time knowledge—at that milestone. While not an operational milestone, developing a professional change management strategy also reduces operational risk. Here too, knowledge support can be instrumental in reducing risk.

Developing and implementing a knowledge management plan can be an invaluable tool for managing these four initial development stages, especially in conjunction with a professional change management strategy that evolves to meet the consortium's operational needs.

## Recommendations

CPI recommends that the consortium address the following needs, which are generated by the operational milestones identified in the previous section (“Conclusions”) and the change management effort.

### THE NEED: IMPLEMENT A PROFESSIONAL CHANGE MANAGEMENT STRATEGY

Change management eases the transition from one way of doing business and working to a different way. This section defines the critical success factors for an effective change management strategy, and recommends elements of a solution.

#### Defining the Critical Success Factors for an Effective Change Management Strategy

Two critical success factors for an effective change management strategy are:

- Having a shared understanding of the business and constituent operations
- Having a fully developed internal support structure for communication, knowledge management, and operational controls

Shared Understanding	Internal Support Structure	Addresses these issues
X		Existing staff, newly hired staff, or staff in operations where a high degree of change is expected have significant transition needs.
X	X	Managers have recently been hired and are not as yet acting as a team.
	X	It is necessary to be prepared for the unexpected—simulations can only be approximate; there is no heuristic data.
X		Discrete decision-support systems are being chosen for their excellence in a specific area; therefore there is no integrated, holistic decision-support system.
	X	There has not been sufficient attention paid to knowledge support localization.
X	X	Currently, the consortium still perceives itself not as one organization, but as three: Upstream, Downstream, and Shared Services Organization; or Mobil (now Exxon), company X, and VEBA OEL.
	X	The knowledge support trade-offs being considered by the consortium make it likely that significant issues will arise.
	X	There needs to be an effective and fully supported help desk.
	X	the consortium-specific Standard Operating Procedures (SOPs) are not yet defined and are needed to institute operational controls.

**Recommendations**

Shared Understanding	Internal Support Structure	Addresses these issues
	X	Key operations need to demonstrate accountability, validate the BIMS investment decision, and maximize production.
	X	There is not yet a training infrastructure in place.
	X	There is no documentation infrastructure to support the consortium as Project Avila and the consortium operations progress.

**Recommendations for Implementing Elements of a Solution**

Having defined the issues, we can begin the process of putting knowledge support components in place to ease the transition. CPI can help in any or all of the following ways:

Component	Offers	Timing	Can Be Performed by	Must Be Provided by Client
A general users' group	<p>A forum for discovering common and domain-specific concerns that a defined practice would address</p> <p>A forum for identifying and defining practice boundaries and flow-throughs</p> <p>A vehicle for creating general awareness of issues and their status</p> <p>Facilitation of effective change management practices</p>	TBD	Staff need to be hired	
A managers users' group	<p>A forum for discovering common and domain-specific concerns and worries that a defined practice would address</p> <p>A forum for identifying and defining practice boundaries and flow-throughs</p> <p>A vehicle for creating general awareness of issues and their status</p> <p>Facilitation of effective change management practices</p>	TBD	Managers need to be hired	
A change management strategy	A definition of what is required to move successfully from one set of practices to another	TBD	Client, with assistance from CPI	Yes
A change management campaign	Acceptance of the change management strategy	TBD	Client, with assistance from CPI	Yes

**THE NEED: TO FORMALLY CONCLUDE THE CONFIGURATION PROJECT**

Every implementation has a configuration phase, which must be formally concluded before the system begins to operate in a production mode. This section identifies the critical success factors that need to be managed at this juncture.

**Defining the Critical Success Factors for Concluding the Configuration Phase**

These two critical success factors will contribute to lower risk as the consortium transitions into an operating mode:

- To ensure that everything is in place for go-live and beyond, including mechanisms to deal with the unexpected, an operational plan for go-live must be in place prior to go-live
- A mechanism for providing legacy information to future staff regarding salient information on the system configurations must be in place

**Recommendations for Implementing Elements of a Solution**

The consortium can capture legacy information in a project history document. This summary should be readily available to all appropriate users, wherever they are.

Deploying this summary in online mode would not only provide maximum accessibility, but would also allow the project summary to be the primary view into Lotus Notes.

The project summary document, which the consortium has identified as an important deliverable, formally concludes the implementation (project) phase and becomes part of the legacy for those who will staff and run various aspects of the consortium. The document summarizes project history—what decisions were made and why—and other salient information.

Using the CPI viewer technology, the consortium can leverage the strengths of an online environment, which provides ready access to all authorized users regardless of location and displays information according to “views” selected by the user. A specific view into the project history document can serve as a portal to the supporting information in the Lotus Notes database.

**Recommendations**

<b>Component</b>	<b>Offers</b>	<b>Timing</b>	<b>Can Be Performed by</b>	<b>Must Be Provided by Client</b>
Online Project History	Documentation of what has been done. The people who have created the configuration—consultants from the various vendors and from the partners—will leave as their assignments end. New managers will need to research the system. The project summary distills and increases the availability of historical project information.	TBD	CPI with assistance	Yes
Go-Live operational plan	Advance planning so that upcoming needs will be met just-in-time. This plan also provides a basis for tracking implementation compliance, and provides survival strategies	TBD	CPI with assistance	Yes

CPI can assist in delivering the project summary document in any or all of the following ways:

1. Help evaluate and organize the information in the Notes database.
2. Help write the history. This process can include interviewing appropriate project contributors in order to refine and resolve any open issues.
3. Help identify views that would address the needs of specific user communities.
4. Implement the content within the CPI viewer technology.

**THE NEED: CROSSING THE THRESHOLD FROM PROJECT TO OPERATION**

There are events and concerns strictly related to startup. Everyone recognizes that a smooth go-live is important. The startup will be easier or more difficult, depending in good measure on the smoothness or bumpiness of the go-live. Several critical success factors for a smooth startup are not yet in place. the consortium needs to address these critical success factors.

**Defining the Critical Success Factors for an Effective Transition**

The principal critical success factor here is preparedness, which means being equipped to manage the expected and the unexpected. Specifically:

- Define how you will identify and plan for what you need to put in place over time
- Establish how you will manage what you can't foresee

Every implementation experiences unanticipated difficulties; simulations can only be approximate. Therefore, the ability to provide mechanisms and support to deal with the unexpected is critical. An operational plan designed for go-live is a critical success factor for a successful go-live experience and must be in place prior to go-live. Prior to

## Recommendations

developing this plan, it is necessary to do a major, comprehensive review of all scheduling and deliverables.

### Recommendations for Implementing Elements of a Solution

Having defined the issues, we can begin the process of putting knowledge support components in place to ease the transition. CPI can help in any or all of the following ways:

Component	Offers	Timing	Can Be Performed by	Must Be Provided by Client
Online and in-print Day-1 Go-Live Quick Reference Cards	Support for staff as they transition from implementation project to Day-1 startup issues	Begin after FAT	CPI with assistance	Yes
Go-Live operational plan	Advance planning so that upcoming needs will be met just-in-time. This plan also provides a basis for tracking implementation compliance and provides survival strategies	TBD	CPI with assistance	
Vendor-supplied training	Introduction to the basic operations of the software screens, menus, and options	TBD	consortium	Yes
Vendor-supplied documentation	Comprehensive information regarding the software screens, menus, and options	TBD	consortium	Yes
Identification of the Day-1 issues that will help create the practice criteria	The first blocks in the foundation of the consortium readiness for full operation	Immediate- or near-term	CPI with assistance	

### THE NEED: TO CONTINUE AN EFFECTIVE TRANSITION FROM GO-LIVE TO EARLY OPERATION

Once you have crossed the threshold and passed through the survival stage, you enter a new phase—one in which people can begin to focus on the details of day-to-day jobs. We pay particular attention to leveraging the temporary organization while building the consortium's staff as a prudent way to ease the transition. There are critical success factors for a smooth transition to this phase that are not yet in place. The consortium needs to address these critical success factors.

### Defining Critical Success Factors for an Effective Transition

The following are two critical success factors for reducing risk and delivering better operations at this juncture:

- Having adequate and current user training
- Having a shared understanding of the business and constituent operations

**Recommendations**

User Training	Shared Understanding	Issue to be addressed
X		Vendor-supplied training on the standard features of the products has been done too far in advance of system use.
X		Training has been done and will continue to be done on the product features rather than within the context of the consortium-specific business practice.
X		There is not yet a training infrastructure in place.
	X	Existing staff, newly hired staff, or staff in operations where a high degree of change is expected have significant transition needs.
	X	Managers have recently been hired and are not as yet acting as a team.
	X	Discrete decision-support systems are being chosen for their excellence in a specific area; therefore, there is no integrated, holistic decision-support system.
	X	Currently, the consortium still perceives itself not as one organization, but as three: Upstream, Downstream, and Shared Services Organization; or Mobil (now Exxon), company X, and VEBA OEL.

**Recommendations for Implementing Elements of a Solution**

Having defined the issues, we can begin the process of putting knowledge support components in place to ease the transition. CPI can help in any or all of the following ways:

Component	Offers	Timing	Can Be Performed by	Must Be Provided by Client
Online and in-print Quick Reference Cards	Support for staff beyond Day-1 startup needs (maybe tips and tricks?)	After go-live	CPI with assistance	Yes
Coaching	Help with simple (and infrequent) questions	N/A	Temporary consortium staff	Yes
Mentoring	Help with more complex or conceptual issues	N/A	Temporary consortium staff	Yes
Identification of issues that will help create the practice criteria	Additional structure and material as the consortium builds the foundation for full operation	Immediate- or near-term	CPI with assistance	
Adaptation of temporary practices to reflect actual experience	The basis for an effective operating practice	TBD	No	

**THE NEED: TO ESTABLISH A FRAMEWORK TO SUPPORT THE CONSORTIUM'S GROWTH**

As the first quarter after go-live approaches, the consortium will continue to evolve into a stand-alone organization. The operating partners will remove the staff loaned to the configuration and start-up phase of the consortium and the consortium will operate with its own permanent staff. As each element of the company moves into place, the consortium will experience conditions reminiscent of the initial go-live. The company will continue to progress further into a production mode. There are critical success factors for a smooth transition to this phase that are not yet in place. the consortium needs to address these critical success factors.

**Defining Critical Success Factors for Supporting Growth Safely**

- Having a shared understanding of the business and constituent operations (A)
- Having a fully developed internal support structure for communication, knowledge management, and operational controls (B)

(A) Shared Understanding	(B) Shared Understanding	Addresses these issues
X		Existing staff, newly hired staff, or staff in operations where a high degree of change is expected have significant transition needs.
X		Most of the consortium staff will prefer that all essential knowledge support materials be localized. Currently, all materials (vendor-supplied) are in English.
X	X	Managers have recently been hired and are not as yet acting as a team.
	X	It is necessary to be prepared for the unexpected—simulations can only be approximate; there has been no heuristic analysis.
X		Discrete decision-support systems are being chosen for their excellence in a specific area therefore there is no integrated, holistic decision-support system.
	X	There has not been sufficient attention paid to knowledge support localization.
X	X	Currently, the consortium still perceives itself not as one organization, but as three: Upstream, Downstream, and Shared Services Organization; or Mobil (now Exxon), company X, and VEBA OEL.
	X	The knowledge support trade-offs being considered by the consortium make it likely that significant issues will arise.
	X	There needs to be an effective and fully supported help desk.
	X	the consortium-specific Standard Operating Procedures (SOPs) are not yet defined and are needed to institute operational controls.

**Recommendations**

(A) Shared Understanding	(B) Shared Understanding	Addresses these issues
	X	Key operations need to demonstrate accountability, validate the BIMS investment decision, and maximize production.
	X	There is not yet a training infrastructure in place.
	X	There is no documentation infrastructure to support the consortium as Project Avila and the consortium operations progress.

**Recommendations for Implementing the Elements of a Solution**

One of the critical success factors for the consortium is sound staffing. This means more than simply hiring; it means training and acculturation as well. CPI can help in any or all of the following ways:

Component	Offers	Timing	Can Be Performed by	Must Be Provided by Client
A general users' group	<p>A forum to discover common and domain-specific concerns that a defined practice would address</p> <p>A forum to identify and define practice boundaries and flow-throughs</p> <p>A vehicle for creating general awareness of issues and their status</p> <p>Facilitation of effective change management practices</p>	TBD	Staff need to be hired	No
A manager users' group	<p>A forum to discover common and domain-specific concerns that a defined practice would address</p> <p>A forum to identify and define practice boundaries and flow-throughs</p> <p>A vehicle for creating general awareness of issues and their status</p> <p>Facilitation of effective change management practices</p>	TBD	Managers need to be hired	No

**Recommendations**

<b>Component</b>	<b>Offers</b>	<b>Timing</b>	<b>Can Be Performed by</b>	<b>Must Be Provided by Client</b>
Definition and codification of practices, deployed online	<p>Introduction to the consortium-specific SOPs, which are needed to institute operational controls.</p> <p>Risk reduction resulting from the growth of a skilled and knowledgeable workforce, who will remain after the temporary staff has left the consortium</p>	Immediate- or near-term	CPI with assistance	
Practice-based training and documentation materials, to be stored in an online knowledge support repository	<p>Delivery of the consortium-specific SOPs, which are needed to institute operational controls and by the help desk.</p> <p>Support for the consortium as it marshals its workforce to achieve operational goals with a high degree of accountability</p>	Immediate- or near-term	CPI with assistance	
Online deployment of process diagrams	Searchable and collapsible/expandable business process schematics	Immediate- or near-term	CPI with assistance	

## Statement of Work

For this needs assessment, CPI focused on exposing the areas that need knowledge support, identifying the knowledge support components that would address those needs, and identifying the competencies necessary to create or develop those knowledge support components. Client has identified specific knowledge support vehicles that they wish to pursue now.

Now CPI can embark on a new effort to define a work plan for each of the desired items. The following list identifies those tasks that CPI can begin now:

- Investigate the requirements to create the Project Avila History.
- Investigate what index enhancements make sense for the vendor-supplied documentation.
- Document the Conference Room Pilots (CRPs).
- Determine the effort required to display and leverage the process diagrams using CPI's viewer technology.
- Establish a framework for both users' groups.
- Assist in developing a change management campaign strategy.
- Define a go-live operation plan.

CPI can commence work on a time and materials basis.

### **INVESTIGATE THE REQUIREMENTS FOR THE PROJECT HISTORY**

Determining requirements for developing the Project Avila project history involves the following tasks:

- Determine how much, if any, of the configuration has been documented. (Ronnie)
- Determine whether there is useful information regarding past meetings in the MS Project schedules. (Ronnie)
- Determine what Client and the consortium wish the history to achieve. (Ronnie investigates, Susan Hill helps synthesize)
- Generate a high-level outline for the history that meets the approval of Client and the consortium.
- Determine the real conditions for creating this history: e.g., do the source materials exist? (Ronnie investigates)
- Define the approach for creating the history. (CPI project management)
- Define the workflow for this approach and determine project size. (CPI project management)

### **INVESTIGATE INDEX ENHANCEMENTS**

Determining requirements for enhancing the vendor-supplied documentation indexes and tables of contents involves the following tasks:

- Determine the volume and types of documentation being supplied by the software vendors, where these materials are and in what forms, and how they are delivered to Client and the consortium. (Ronnie)
- Evaluate the existing table of contents and index for each documentation component, whether that documentation component is paper, online, or both. (Ronnie)

---

## Statement of Work

- Assess the adequacy and usefulness of each documentation component. (Ronnie and Susan)
- Define roadmap criteria and identify the benefits and level of effort required by that roadmap so that Client (and perhaps the consortium) can determine whether creating such a roadmap provides significant added value. (All)
- Determine whether Client wishes to make any further enhancements and whether these provide significant added value. (Susan)
- Determine how to deploy the roadmap and how that decision impacts the project size. (Susan and Lisa)

### **DOCUMENT EACH CRP**

As part of its project management responsibilities, Client needs to document the results of each CRP with special attention to the following:

- Was the CRP completed?
- Was the CRP accepted with exceptions? If so, identify each exception.
- Was the CRP accepted with issues? If so, identify each issue.
- Was the CRP not accepted because of issues? If so, identify such issue.
- What were the results of the CRP?

Creating this document involves the following tasks:

- Observe the CRPs and document the salient information. (Ronnie)
- Identify how this document will be used, by whom, and for what purpose. (Ronnie)
- Define an outline for the document that meets Client' approval. (Ronnie and Susan)
- Determine how the document will be deployed. (Lisa and Susan)
- Create the document. (primarily Ronnie)

Participating in the CRPs also allows CPI to become familiar with the Maximo and JD Edwards software.

### **ASSESS THE EFFORT FOR PORTING THE PROCESS DIAGRAMS**

Determining the requirements and assessing the level of effort for displaying the process diagrams involves the following tasks:

- Determine the conversion effort to simply display the diagrams using the CPI viewer technology. (CPI production personnel)
- Identify how to leverage the power of the CPI viewing technology for added-value ways to display and use the process diagrams. (Susan, Lisa, and Ronnie)
- Ascertain the approach and level of effort to make these enhancements so that Client can determine whether porting the process diagrams still provides significant added value. (CPI project management)

### **ESTABLISH A FRAMEWORK FOR BOTH USERS' GROUPS**

Client has expressed interest in including two users' groups as part of its change management strategy: a managers' user group and a general users' group. Establishing the framework for each users' group is a consulting endeavor and involves the following tasks:

- Define the charter of each users' group—the purpose, the participants, the rules of procedure, and so forth. (Warren Bingham, Ted, and Susan)
- Determine the forum and frequency of meetings. (Warren Bingham, Ted, and Susan)
- Determine the method to capture and disseminate significant outcomes from these meetings. (Warren Bingham, Ted, and Susan)
- Identify who should run these meetings and train that person; we recommend that Gary (Client) run the initial meetings, that is, during the first quarter after go-live. (Warren Bingham and Ted)

### **DEVELOP A CHANGE MANAGEMENT CAMPAIGN**

CPI can assist Client in defining and developing a change management campaign. This effort is primarily a consulting endeavor and involves the following tasks:

- Define the primary and secondary goals that the change management campaign needs to deliver.
- Identify and understand any requirements of the campaign specified by the consortium.
- Determine the critical success factors for either delivering the campaign or for the campaign to deliver on its goals.
- Define elements comprising the campaign; recognize that some things require collateral and others don't.
- Create any necessary collateral per direction by Client.

### **DEFINE A GO-LIVE OPERATION PLAN**

CPI can assist Client in defining a go-live operation plan. This effort is primarily a consulting endeavor and involves the following tasks:

- Identify and develop checklists. (Ronnie, Ted, and Susan)
- Define survival strategies: What happens if... (Susan)
- Arrange for support from software vendors. (Gary [Client])
- Begin the process of defining a documentation infrastructure. (CPI project management)