Project Health and Alignment

offered by

SAPIT

SAPIT provides Solutions for Analytics, Process Automation, Industry 4.0 and Digital Transformation

Project Health and Alignment Services

Project Health Preventive Project Care ("Mission Co-Pilot" scenario)	Project Alignment Corrective Project Care ("Refuel In Flight" scenario)
Project has not started. Goal is to ensure project starts right and stays on track. SAPIT provides a Project Health Advisor as the "Mission Co-Pilot"	Project has started (usually well under way) and needs help to get back on track. SAPIT provides a Project Health Advisor and additional resources (if needed) to "refuel in flight and land the plane"
Initial Health Check (recommended)	Initial Health Check (required)
Purpose of this one-time Health Check is to determine focus areas for the on-going project support (if needed)	Purpose of this one-time Health Check is to determine project scope, staffing and estimate the engagement duration (therefore required at start)
Periodic Health Check (optional)	Periodic Health Check (optional)
Project Health Advisor will provide the needed PMO and steering committee reporting. Periodic Project Health Checks per SAPIT methodology are still recommended as an optional service and billed separately	Project Health Advisor will measure and monitor progress towards the intended project recovery. Periodic Health Checks are included in the project fee

Scenario Overview

Enga-gement Type	Project Health Preventive Project Care ("Mission Co-Pilot" scenario)	Project Alignment Corrective Project Care ("Refuel In Flight" scenario)
Timing/ Trigger	Project has not started. Goal is to ensure project starts right and stays on track. SAPIT provides a Project Health Advisor as a "Mission Co-Pilot"	Project has started (usually well under way) and needs help to get back on track. SAPIT provides a Project Health Advisor and (if needed) additional resources to assist
Scope of work (e.g.)	a. Manage RFP / Vendor Selection b. Review Docs (MSA, SOW, …) c. Vet Key Project Resources d. Project Plan Review e. Periodic Project Health Assessment f. Steering Committee / PMO g. Quality Gate Checks h. Business Relationship Manager	a. Scorecard and Health Check (on-going) b. Risk Mitigation c. Triage d. Recovery planning e. Contingency planning f. Fallback planning g. Quality assurance h. Temporary staff augmentation
Engage	Week-to-week, 2+ weeks, 2 weeks notice	Fixed term of 6+ weeks, 2 weeks notice
Health Check	Recommended prior to start and on-going	Required prior to start and recommended on-going

Health Check Scorecard (example)

ID	Area	Prio.	Score	Effort	Est.
1	Strategy		B		
2	Governance		D		
3	Staffing		D		
4	Budget		A		
5	Timeline		A		
6	Data Migration		C		
7	Change Management		C		
8	Documentation		F		

The actual scorecard has more items and details; it is used in both Scenarios. For "Refuel In Flight" Scenario, items with a score below "B" will be part of the scope. SAPIT has a couple of proprietary scorecard models. They can be adjusted based on customer needs, e.g. PMO procedures and project execution policies.

Scope Details (example/1 of 2)

- Testing
  - UAT, Integration, Migration
  - Training, Change Management, Team Enablement
- Quality Gates
  - Not meeting quality criteria (either sub-standard or missing information)
  - Sign-off procrastination
- Business Objectives
  - Not delivering promised scope, improper integration
  - Scope creep management, expectation management
- Project Changes
  - Adjust project based on business needs, environment, re-planning
- Project Deliverables
  - Prioritize and manage deliverables, particularly at-risk or delayed items
  - Custom development
  - Documentation
- Resources
  - Staffing

Scope Details (example/2 of 2)

- PMO Support
  - Reporting of project status to PMO
  - Align project with PMO objectives
  - Ensure proper metrics, scorecard and KPI reporting

- Triage Work
  - Scope items
  - Defects
  - Team and Talent

- Financial / Budget
  - Identify cost and budget overruns
  - Compliance checks (e.g. travel policy)

- Contract issues/evaluations
  - Facilitate change order process
  - Assist dispute mediation (customer, systems integrator, contractors)
  - Engagement contract(s), Statements of Work, Request for Proposal evaluation

Why Project Health Advisor?

"Mission Co-Pilot" Situation:
- Company lacks expertise and experience running ERP projects
- Company wants a second set of eyes on their project
- Business outcome should be ensured and scope creep avoided
- Lack of familiarity using new technologies (also at the Systems Integrator)
- No full PMO in budget or PMO does not have the bandwidth to support

Strategy:
- Conduct a SAPIT Project Health Check (optional)
- Develop a Scorecard with detailed focus areas and report
- Short initial engagement (2 days, fixed fee)

"Mission-Co Pilot" Solution:
- Trusted Project Health Advisor to support project on an on-going basis
- Works mainly with existing project manager, integration manager, steering committee
- Can address clarifications at all levels ('top floor to shop floor')
- Can be a 100% remote project
- Recurring SAPIT Project Health Checks can be included

Engagement Model:
- Retained by customer or systems integrator, or both
  - If retained by both, they must agree on one party to contract with SAPIT; both parties will be on all email threads involving SAPIT

Why Project Alignment ?

"In Flight" Situation:
- Imminent risk of project falling behind schedule or running over budget
- Business outcome in question or scope creep
- Track(s) at risk, requires intervention and assistance at multiple levels with shortened communications
- "Require twice the impact in half the time"

Strategy:
- Conduct a SAPIT Project Health Check (required)
- Scorecard with Solution Recommendations, including Re-Alignment proposal
- Short initial engagement (2 days, fixed fee, to be credited upon completion of engagement)

Re-Alignment "Solution":
- Deploy top-notch talent, deep and broad expertise
- Often requires only one resource, "Project Lead" (Project Health Advisor)
- Additional SAPIT resources can be deployed (if needed)
- Lead works with existing project manager, integration manager, architect(s), team lead(s), staff
- Lead has hands-on "get-it-fixed" mentality and can support at all levels ('top floor to shop floor')
- Can be a 100% remote project

Engagement Model:
- Retained by customer or systems integrator, or both
  - If retained by both, they must agree on one party to contract with SAPIT; both parties will be on all email threads involving SAPIT

"Refuel In Flight" Example 1

Weeks	Milestones (highlights)	SAPIT staff	Fee	Bill	Pay
0	Engagement start/retainer			12 FTE	4 FTE
1	Reorganize work in the following streams • Data cleansing, mock data loads • Cutover and fallback planning • UAT planning preparation	• Project Health Advisor	1 FTE	1 FTE	
2	Development and documentation signoff Test scripts Training scripts (end users)	• Project Health Advisor	1 FTE	1 FTE	8 FTE
3	Training scripts Mock data loads Steering Committee (UAT start)	• Project Health Advisor • Logistics consultant • Finance consultant	3 FTE	3 FTE	
4	UAT	3	3 FTE	3 FTE	
5	UAT	3	3 FTE	3 FTE	
6	Defect triage, Production approval	3	3 FTE	--	1 FTE
7	Deployment and Cutover	3	3 FTE	--	1 FTE
8	Post Go live support	3	3 FTE	--	3 FTE
9	Post Go live support Project closure	3	3 FTE	--	3 FTE 3 FTE
10	--	0	--	--	3 FTE
		Total:	23 FTE	23 FTE	23 FTE

"Refuel In Flight" Example 2

Weeks	Milestones (highlights)	SAPIT staff	Fee	Bill	Pay
0	Engagement start/retainer			4 FTE	4 FTE
1	Reorganize work in the following streams • Data cleansing, mock data loads • Cutover and fallback planning • UAT planning preparation	• Project Health Advisor	1 FTE	1 FTE	
2	UAT	• Project Health Advisor	1 FTE	1 FTE	
3	UAT	• Project Health Advisor	1 FTE		
4	Defect triage, Production approval	• Project Health Advisor	1 FTE		1 FTE
5	Deployment and Cutover	• Project Health Advisor	1 FTE		1 FTE
6	Post Go live support Project closure	• Project Health Advisor	1 FTE		
		Total:	6 FTE	6 FTE	6FTE

Assumptions

- ## Project deliverables
  - o SAPIT will manage resources and leverage knowledge to achieve outcomes. However, SAPIT does not control project resources and therefore cannot be responsible for their performance and/or the overall project outcome

- ## Time measure
  - o The project fee is billed in weekly installments. Since it is not possible to measure performance, time will be used in lieu. The weekly fee is based on an hourly rate and an assumed number of hours per each resource, billed as one unit
  - o Actual hours will be used to consume the assumed number of hours over the life of the engagement and to ensure SAPIT complies with employment laws. Weekly fluctuations of the workload, to accommodate project needs, are not passed on to the customer, i.e. billing will be at a fixed weekly rate throughout

- ## Resources
  - o Customer provides access to network, conferencing, QA-system, (DEV-system)
  - o Customer provides contact to retrieve any needed PRD-system data on request. No PRD-system access for SAPIT resources will be granted
  - o All SAPIT employees have laptops. Customer can provide a laptop for use
  - o Customer to schedule, host, minute any and all meetings

Costs and Terms

- ## Health Check and Scorecard
    - Payment via wire transfer, ACH credit or credit card. Under $4,000
    - 2 days duration. Usually requires 8-12 interviews at 45' each and access to documentation (emailed)

- ## "Refuel In Flight" Scenario – fixed fee pricing
    - o The purpose of the engagement is to bring the project back on track
    - o Prior Health Check and Scorecard required
    - o Project duration is fixed term (6 week minimum duration)
        - Pricing is based on a fixed weekly fee per resource and billed as a weekly amount, regardless of number of hours worked. SAPIT will designate a project manager as the "lead resource," if there is more than one resource
        - Right to reject lead resource (Week 1). Customer may reject the lead resource at the end of Week 1. In this case, the customer will be refunded three weeks of the retainer payment and the project ends. The week 1 of the retainer is earned in any case. SAPIT is not obligated to provide any replacement resource for the lead and may cease services (entirely), i.e. remove all resources from the project (customer may not re-hire for one year)
        - A retainer payment of 4 weeks is required to commence the project. If the customer rejects the lead resource (during week 1), the payment for 1 week is earned. Otherwise, this entire fee is earned on receipt
        - If any resource is unable to render services (sick, force majeure) and SAPIT cannot provide a replacement, SAPIT will not bill for the resource. SAPIT staff will not share credentials, new account request should be handled quickly
        - Customer can terminate the engagement with two weeks notice at the end of each week. The earliest possible termination date is at the end of week 4 (to maintain the 6 week minimum) and in this case, the termination will be effective at the end of Week 6. Customer will be responsible for payment of two weeks services following the termination, regardless whether they choose to have the consultant render any services during that period
        - SAPIT may terminate the engagement with two weeks notice for convenience. In the event of cause, SAPIT may terminate without any notice

Costs and Terms (2 of 2)

- "Co-Pilot" Scenario (preventive) – fixed fee pricing
  - The purpose of the engagement is to keep the project on track
  - This service can be ordered without a prior Health Check
  - Periodic Project Health Check and Scorecard included
  - Project duration is fixed week-to-week (2 weeks minimum)
    - Pricing is based on a fixed weekly fee per resource and billed as a weekly amount. SAPIT will designate a Project Health Advisor manager who will be the lead resource, if there is more than one SAPIT resource
    - Project scope will be determined prior to engagement start
    - Termination is possible by either party with two weeks notice and will be effective at the end of the second week following the week the notice is given
    - No retainer required (subject to customer credit approval)

- Travel
  - Project delivery can be 100% remote
  - On-site schedule is to be arranged prior to engagement start
  - Reimbursement of actual travel expenses per SAPIT travel policy

Questions?

Thank you for letting us introduce this offering and considering us to help your project !

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