

SFA Integrated Product Team Process Description

Customized IPT Process – Packaged Software Development

Task	Sub-tasks	Deliverables	Organizational Responsibility ¹			
			Channel	CIO	Supplier	Other
System Requirements Analysis	Conduct Market Research to Identify Candidate Packages	Market Research Form Implementation Plan	P	L		
	Determine Build or Buy					

Task	Sub-tasks		Deliverables	Organizational Responsibility ²			
				Channel	CIO	Supplier	Other
Survey and Screen Packaged Software Candidates	Assess Packaged Software Market	Contact Vendors	Vendor Profile	P	L		
		Review and Catalogue Vendor Data					
	Define Packaged Software Screening Criteria	Define Functional Screening Criteria	Packaged Software Selection Criteria Request for Information	P	L		
		Define Quality Screening Criteria					
		Define Technical Screening Criteria					
		Define Vendor Screening Criteria					
		Create/Distribute Request for Information					
Select Packaged Software Finalist	Judge Candidates	Packaged Software Finalists Vendor Comparison Matrix <i>Vendor Profile</i> ³	P	L			
	Notify Finalist						
Manage Project	Manage Schedules	<i>Project Plan</i>	L	P			

¹ (L=Leads Task, P=Participates in Task)

² (L=Leads Task, P=Participates in Task)

³ *Italics denotes an update to an existing document.*

SFA Integrated Product Team Process Description

Task	Sub-tasks		Deliverables	Organizational Responsibility ²			
				Channel	CIO	Supplier	Other
		Manage Budgets Manage Risks Manage Quality Manage Configuration/ Versions of Deliverables Report Project Status	<i>Status Report</i>				
	Coordinate Customer Sponsor Participation in Review		<i>Milestone Review Checklist</i> <i>Milestone Review Document</i>	P	L		
	Maintain Master IPT Schedule			P	L		

SFA Integrated Product Team Process Description

Reviews

System Requirements Analysis Review

- Review Implementation Plan
- Review decision to build or buy
- Review project risks
- Review IV&V Report

Survey and Screen Packaged Software Candidates Review

- Review list of vendors
- Review screening criteria
- Review finalists
- Review project risks
- Review IV&V Report

System Requirements Analysis Review Criteria

- Implementation Plan sufficiently detailed
- Packaged software sufficiently researched
- Packaged software sufficiently meets review criteria
- Project risks and issues are manageable
- IV&V report issues satisfactorily resolved

Survey and Screen Packaged Software Candidates Review Criteria

- Selection criteria supports business requirements
- Information from the vendors has been collected and documented
- Finalists have been identified by comparison based on defined criteria
- Project risks and issues are manageable
- IV&V report issues satisfactorily resolved

SFA Integrated Product Team Process Description

Task	Sub-tasks		Deliverables	Organizational Responsibility ⁴			
				Channel	CIO	Supplier	Other
Develop Packaged Software Request for Proposal	Finalize Packaged Software Selection Criteria	Review Business Capability Requirements	<i>Packaged Software Selection Criteria</i>	P	L		
		Review Process Architecture					
		Review Application Software Architecture					
		Review Delivery Vehicle Architecture					
		Finalize Selection Criteria					
		Finalize Levels of Need and Scoring Method					
Prepare and Distribute Request for Proposal	Define Business Scenarios	Identify Critical Requirements	Business Scenario	L	P		
		Identify Categories of Business Scenarios					
		Define Initial Business Scenarios					
		Review and Finalize Business Scenarios					
	Prepare and Distribute Request for Proposal	Prepare Request for Proposal	Request for Proposal Narrative	P	L		contracting and acquisition
		Approve Request for Proposal					
		Distribute Request for Proposal					
Manage Project		Manage Schedules	<i>Project Plan</i> <i>Status Report</i>	L	P		
		Manage Budgets					
		Manage Risks					

⁴ (L=Leads Task, P=Participates in Task)

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Task	Sub-tasks		Deliverables	Organizational Responsibility ⁴			
				Channel	CIO	Supplier	Other
		Manage Quality					
		Manage Configuration/ Versions of Deliverables					
		Report Project Status					
	Coordinate Customer Sponsor Participation in Review		<i>Milestone Review Checklist</i> <i>Milestone Review Document</i>	P	L		
	Maintain Master IPT Schedule			P	L		

Reviews

Develop Packaged Software Request for Proposal Review

- Review Business Scenarios
- Review Request for Proposal
- Review project risks
- Review IV&V Report

Develop Packaged Software Request for Proposal Review Criteria

- Business Scenarios include critical requirements to evaluate packaged software
- Request for proposal includes sufficient information for vendors
- Project risks and issues are manageable
- IV&V report issues satisfactorily resolved

SFA Integrated Product Team Process Description

Task	Sub-tasks		Deliverables	Organizational Responsibility ⁵			
				Channel	CIO	Supplier	Other
Evaluate and Select Packaged Software Finalist	Conduct Vendor Demonstrations	Prepare for Vendor Demonstrations	Vendor Score Sheet	P	L		
		Conduct Vendor Demonstrations					
		Complete/Compile Demonstration Results					
	Contact Packaged and Software References Conduct Site Visits	Obtain Customer References	Reference/Site Visit Questionnaire	P	L		
		Determine Site Visit Strategy	Risk Assessment Matrix				
		Review Materials	Site Visit Questionnaire for Vendors				
		Prepare Questionnaires					
		Select/Schedule Site Visits					
		Conduct Site Visits					
	Select Packaged Software Finalist and Negotiate	Evaluate and Compare Packaged Software Finalists	Contract Strategy	P	L	P	contracting and acquisition
		Begin Negotiation with Finalist Vendors	Packaged Software Gap Log				
		Select Packaged Software Finalist	<i>Vendor Comparison Matrix</i>				
Confer with Management and Legal Counsel							
Conclude Final Negotiation with Chosen Vendor							

⁵ (L=Leads Task, P=Participates in Task)

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Task	Sub-tasks	Deliverables	Organizational Responsibility ⁵				
			Channel	CIO	Supplier	Other	
	Compare Costs and Benefits of Packaged Software Finalists	Analyze Costs Analyze Benefits Verify Costs and Benefits with Vendors Summarize Costs and Benefits Analysis	Business Case Change Request Cost and Benefit Analysis	P	L		
	Finalize Packaged Software Selection	Prepare Packaged Software Evaluation Report Prepare for Conference Room Pilot Prepare for Installation Verification	<i>Contract Strategy</i> <i>Cost and Benefit Analysis</i> <i>Reference/Site Visit Questionnaire for Vendor Customers</i> <i>Risk Assessment Matrix</i> <i>Site Visit Questionnaire for Vendors</i> <i>Vendor Score Sheet</i>	P	L		
	Manage Project	Manage Schedules Manage Budgets Manage Risks Manage Quality Manage Configuration/ Versions of Deliverables Report Project Status	<i>Project Plan</i> <i>Status Report</i>	L	P		
	Coordinate Customer Sponsor Participation in Review		<i>Milestone Review Checklist</i> <i>Milestone Review Document</i>	P	L		
	Maintain Master IPT Schedule			P	L		

SFA Integrated Product Team Process Description

Reviews

Evaluate and Select Packaged Software Finalists Review

- Review the vendor score sheet
- Review packaged software gap log
- Review cost and benefit analysis
- Review project risks
- Review IV&V Report

Investment Review Board (IRB)

- Review business case
- Review estimated project costs
- Approve/reject packaged software funds

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Review Packaged Software Selection documents
- Develop IV&V report

Evaluate and Select Packaged Software Finalists Review Criteria

- Vendors have been scored based on the selection criteria
- Gaps have been identified between the packaged software and the business requirements
- Cost and benefits have been documented for each finalist
- Packaged software has been selected for the defined business problem
- Project risks and issues are manageable
- IV&V report issues satisfactorily resolved

IRB Review Criteria

- Agreement with baseline projections
- Agreement with future net benefits
- Agreement with project scope, including cost and schedule
- Availability of funding