

SFA MODERNIZATION PARTNER PROJECT

**Enterprise Engineering
Ombudsman System Redesign**

**Bi-Weekly Status Report
(2/14/00 - 2/25/00)**

Planned Activity Summary

Planned Activities		Target	Status	Results
<i>March 2000 Report Creation</i>				
	<ul style="list-style-type: none"> Identify Report Requirements 	2/18	C AE	<ul style="list-style-type: none"> Data elements required for analysis have been identified and agreed upon. Data elements will come from either OCTS or NSLDS data bases
	<ul style="list-style-type: none"> Develop Methods to extract from OCTS and NSLDS 	2/18	C AE	<ul style="list-style-type: none"> Access to OCTS has been obtained, data elements are known and have been selected, sample data has been retrieved. Access to NSLDS can be done, Chris Hill is in contact with Sandra Fowler to get this information retrieved.
	<ul style="list-style-type: none"> Define manual efforts required to add information 	2/25	C AE	<ul style="list-style-type: none"> This will be assessed after looking at data and whether or not the data will be reported on. The manual data to be entered has been identified.
	<ul style="list-style-type: none"> Build Access Data Base 	3/10	C AE	<ul style="list-style-type: none"> Data elements have been defined, Vince has done some work to move data from OCTS to a sample database
	<ul style="list-style-type: none"> Build Access management reports 	3/17		<ul style="list-style-type: none">
	<ul style="list-style-type: none"> Provide analysis support 	3/17		<ul style="list-style-type: none">
	<ul style="list-style-type: none"> Final report Prepared 	3/20		<ul style="list-style-type: none">
<i>Replacement System Selection</i>				
	<ul style="list-style-type: none"> Define Ombudsman Requirements 	2/18	C AE	<ul style="list-style-type: none"> Ombudsman requirements at a high level have been identified. How requirements from other SFA organizations will be incorporated should be determined.
	<ul style="list-style-type: none"> Identify CRM vendors 	2/18	C AE	<ul style="list-style-type: none"> 4 Vendors selected to hear presentations and visit customers. Clarify, Oracle, Siebel, and Vantive.
	<ul style="list-style-type: none"> Develop Vendor evaluation Criteria 	3/3		<ul style="list-style-type: none">

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Planned Activities		Target	Status	Results
	• Schedule CRM Vendor Meetings	3/3		•
	• Evaluate CRM offerings	3/23		•
	• Select CRM Vendor	3/24		•
	• Build Implementation Plan	3/31		•
	• Prepare Task order Proposal	3/31		•
	•			•

(* **Valid Status:** (*AE*)-As Expected, (*>E*)- Greater than Expected, (*<E*)-Less than Expected, (*C*)-Complete

Plans for Next Week

Planned Activities	
• Andersen Consulting meetings with CRM vendors to better explain project	
• Finalize data extraction for Access Data base and build sample data base for review	
• Continue planning for management reports to be provided	
• Build CRM evaluation criteria	
• Finalize CRM vendor meeting schedules	
•	
•	

Schedule of Key Meetings

Key Meeting	Date
Meeting with Oracle at Portals	2/28, 2 PM
Meeting with Clarify	3/2, TBD

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Risk Summary

The following section is intended to inform management and team members about project risk areas and their potential consequences. Risks are evaluated in terms of their potential impact on meeting the target completion date (**schedule**), increasing project costs (**cost**), and/or decreasing quality of deliverables (**quality**).

RISK	SYMPTOMS	RESPONSES	Severity of Impact	Probability of Occurrence	Ability to Control	DATE Reduced by 50%	DATE Complete	Resp
	• •	• •						

Issue Summary

Issue	Recommended Solution	Resp	Creation Date	Resolve Date	Status

Staffing Updates:

David Fein Will work primarily on *March, 2000 Report*
Joe Wood Will work primarily on CRM Vendor evaluations

Other Relevant Information:

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None