

Pilot Notes

Solution Acquisition Planning (SAP) Pilot Notes

Pilot review of SAP materials with FP DataMart

Attendees:

Jennifer Jones
Ronald Langkamp
Nancy Krecklow

Materials Reviewed:

IT Business Case Cost Estimating Tool
Solution Acquisition Plan
Acquisition Planning Estimating Worksheet

Nancy K. populated the IT Business Cost Estimating Tool and Acquisition Planning Estimating Worksheet in preparation for the review. She also populated sections of the SA Plan not contained within the business case.

First reviewed was the IT Business Cost Estimating Tool

Nancy had issues understanding where to include Project Management Activities. Based on Nancy's knowledge of her current project and how many days she has budgeted for completion, she entered in what she estimated to be the appropriate number of workdays into the Cost Estimating Tool.

The tool produced a number of estimated workdays that were double the amount Nancy estimated for her project. Nancy had also not filled in many sections of the tool yet, which would further increase those numbers.

Nancy noted that the Requirements section of the tool was not automatically populated like the other areas of the tool.

Nancy also noted that her data mart project required different considerations for working days based on the individual project's needs.

Lessons Learned:

Nancy preferred being able to enter her own days for all columns, as she was able to do in earlier iterations of the tool.

She wants to have the ability to enter in her own numbers and provide a reason for the exception to the best practice estimated timing.

Second reviewed was the Solution Acquisition Plan Template

Nancy noted her first impression of the tool was how similar the tool was to the business case. She commented that updated both tools would probably be tedious and would most likely not be done.

She did not feel that Modernization Partner TO managers would gain much value by completing tool. She also noted that for fixed priced contracts TO managers often don't even update business case due to having already received funds and attempting to complete work on time and only truly do updates now if the project is going back to the IRB.

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Nancy did note however that actuals from previous projects would be helpful in the estimation effort and would support showing clients how estimating activities may take place concurrently.

Nancy felt that many of the acquisition strategy sections were already included in most business cases, just not detailed in this particular way.

Nancy does not consider the tool different from a Mod. Partner prospective than filling out a business case. However she noted that each channel currently handles completing acquisition strategy sections in different way and this could provide some consistency. Confusion still lies between what a Risk and what a Constraint is. Nancy said currently she would list both within the business case Risk Management section.

Modernization Partner partnership with SFA makes completing Acquisition Strategy section simple. Should emphasize that a Solution Acquisition is beyond a single business case or TO and should encompass considering entire solution.

Ron stated that Contract Considerations section is a lead in to Transition to Support. Operations to Value Realization is different than the currently planned operations hand-offs.

Lessons Learned:

Nancy would see this plan being helpful for SFA Project Managers

She sees the tool as a way to help SFA manager to think about issues and help them to understand different pieces of a solution acquisition.

Nancy questioned weather or not it would actually be a productive activity for SFA project managers to consider the project from this level of detail.

“The more they complete the tool the better they will get at it”

Nancy felt SFA project managers may not be able to complete first project proposal but could possibly complete 2nd and 3rd project proposals for updates, etc.

Final review was the Acquisition Planning Estimating Worksheet

Nancy estimated 24 days for her project using the tool. Nancy also has a small data mart project involving only 4 resources.

Nancy stated she would reference the information in the tool. That the tool gives credibility to pre-time work.

Filling out this tool bring home start date needs and planning time.

Nancy was not sure if Mod. Partner need to complete this tool.

She defiantly saw an advantage to SFA project manager completing the tool.

She would like to see a definition within the tool to distinguish between high level requirement development and business case research.

Nancy stated that she would currently bury this planning time by charging it to another project or stacking the time into “design” time.

Lessons Learned:

Nancy found tool useful for SFA.

Would help ITRs or whomever does business case to display time and consider all steps in planning.

“I didn’t track planning time before this, so I have nothing to compare it to.”

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“I would have underestimated my planning time without the planning worksheet.”

“This tool gets down to asking what does all this involve.”

Nancy stated that we often forget to plan in other people’s time, such as for peer reviews.

“This tool would be helpful for SFA because they do not realize the effort that goes into planning, when things must happen in order to meet deadlines, and who should be involved in this kind of effort.”

“If I could turn this into a deliverable it would be very useful, then I could bill my time where it actually went.”

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Solution Acquisition Planning (SAP) Pilot Notes

Pilot review of SAP materials with eServicing

Attendees:

Jennifer Jones

Ronald Langkamp

Miguel Rodriguez

Materials Reviewed:

Solution Acquisition Plan

Acquisition Planning Estimating Worksheet

IT Cost Estimating Worksheet

Miguel Rodriguez populated sections of the Acquisition Plan and Acquisition Planning Estimating Worksheet in preparation for the review.

Reviewed was the Solution Acquisition Plan Template

Miguel commented that overall the tool helped him think about steps he was taking in the acquisition process. He said he did not feel that if he set down to document the acquisition strategy prior to actually starting the project that he would know how to fill in the sections, yet while he was in the process of the project he felt the plan helped him document many issues.

Miguel did believe that actuals from previous projects would be helpful in the planning effort and would support showing clients how planning activities may take place concurrently.

Miguel commented that SFA never really questioned him about any of these issues brought out in the plan.

Miguel felt that Interdependency section could be used by SFA to address CIO, Channel, and Legacy system issues.

Miguel commented that in less than two hours he had covered all the basics of both tools (outside the business case sections) and that he felt that amount of time was not unreasonable. But he did comment that his time would have increased had this tool been completed pre-business case.

Lessons Learned:

“Starting from at the beginning of a project from scratch, I don’t think I would have thought of the things I needed to in order to fill it out.”

Miguel did see the plan as a way to help SFA manager to understand different pieces of a solution acquisition.

Miguel felt that SFA counterparts could understand the acquisition strategy and especially the constraints as described at this level, rather than the detailed level the tools he uses as a contractor display the issues.

Miguel especially liked the Resource, Scheduling, and Interdependencies issue coverage. He does not feel some SFA counterparts currently plan for this in enough detail and with reasonable time expectations.

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Review was the Acquisition Planning Estimating Worksheet

Filling out this tool helped Miguel gain a quick understanding of start date needs and planning time.

He liked the fact that all points were covered at a high-level.

Miguel commented that this would be an “excellent” tool for beginning to generate costs.

Miguel felt most managers particularly forget to estimate for High Level Requirements Development and Business Case Research.

Lessons Learned:

Miguel found tool useful for SFA and Modernization Partner. He felt the tool would be most useful if the two counterparts completed it jointly.

“I would have underestimated my planning hours before looking at this.”

Miguel suggested adding in sections for planning time sections for discussions/negotiations with hardware/software vendors and legacy systems. He would like to see these sections added for the business case and task order.

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Solution Acquisition Planning (SAP) Pilot Notes

Pilot review of SAP materials with Consistent Answers

Attendees:

Jennifer Jones
Ronald Langkamp
Elena Pienkowski
James Laychak
Mike Kinfu

Materials Reviewed:

Acquisition Planning Estimating Worksheet
Solution Acquisition Plan
IT Cost Estimating Tool

Mike Kinfu review the Acquisition Plan and Acquisition Planning Estimating Worksheet in preparation for the review.

Ron opened the review by stating that the Pilot session sought input from Consistent Answers for feedback on how well the tools would work for their project.

Review was the Acquisition Planning Estimating Worksheet

Jim noted that planning effort is different for Shared and Savings. He stated that for Share and Savings they already perform many of these activities in what they call the “Visioning” phase.

Jim stated that the Share and Savings programs would need to think of this as two separate things, between the planning effort for developing the initial business case and task order (TO) and the eventual development of a final TO that details out planning for Share and Savings project. (This again relates to a business case and TO to develop requirements and a TO to do actual project.

Elena then explained the purpose of the estimation worksheet to the group and the purposes behind it.

Jim stated that this tool applied to all start-up projects and is truly driven by when projects will go to the IRB.

Jim stated his project originally planned to begin working in April and currently his planning was not complete.

Jim stated that in his Share and Savings deal it would be a useful tool for estimating the original business case and task order time for the development and documentation of the Share and Savings plan.

Lessons Learned:

“This tool would make sure we were planning our time and getting paid for that effort.”

“This is more relevant to a fixed priced contract.”

“This tool would really give you some idea of when these things happen.”

“All this applies to getting our original business case and Task Order.”

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Reviewed was the Solution Acquisition Plan Template

Jim did not feel that his second task order would actually go through this type of planning. Jim explained that a value-deal would not need to plan out these activities for the actual development of the Value-Based Deal.

Ron commented that the Value-based Deal is actually the Definition Phase of a project and not necessarily the planning phase.

Jim continued to define how this would not have as much of an impact for the second round of Shared and Savings as there is not true “cost” associated to share and savings.

Lessons Learned:

“This is good to show where you are spending the money.”

Jim felt the wording of the document is a little foreign to the Share and Savings group.

Jim wants to ensure the “flexibility” of the tool. He felt that the flexibility in what you should fill out would be a key to the tools success.

Jim wants to see the emphasis on the document not to be on controlling and managing but on tracking progress and expectations.

Jim pointed out that with a Value-Based deal the “budget” section isn’t really the relevant part, but Milestone, technology, risks, constraints, and following SFA standards should be emphasized when planning.

Jim would rather see the plans focus be “Solution Delivery Plan or the Solution Expectation Plan.”

Tracking Management and Oversight are Fixed-Priced Contract issues, while Share and Savings are about tracking Progress and Expectations.

Jim emphasized that the plan should not manage but oversee project activities.