

## 5.0. Project Management

### 5.1.1. Approach

#### **A. The Vendor must describe the method and any unique characteristics of the approach used to manage the overall project.**

GL Solutions utilizes a comprehensive and effective Project Management Methodology (PMM). We have a formal approach to project management based on the PMI's *Project Management Body of Knowledge* (PMBOK) principles and methods. We also incorporate agile principles and methods into our processes. The iterative planning and feedback loop inherent to the agile development approach reduces risk and ensures quality. It ensures that teams are able to continuously align the delivered system with desired business needs.

GL Solutions' PMM is tightly integrated with all elements of our Project Implementation Process (see below, "5.2.A. Membership Database – Project Implementation Activities"). Our PMM wraps a layer of monitoring, directing, advising, and guidance around the project implementation stages. We adhere to tested management procedures that align our efforts at every phase of the implementation with the goals of the project. Primary in our efforts is effective communication, internally and with your staff. Other efforts include tight adherence to the project plan, frequent project management meetings, consultation on process improvement and/or change management, ongoing risk and gap assessments, and strict scope maintenance.

#### **UNIQUE CHARACTERISTICS**

Several aspects of our approach differentiate us from our competitors:

- Our system is so configurable that we are able to design it to mimic your processes and organizational structure, precisely (without modifying core code). You will not need to adapt your association to fit canned scenarios.
- Our Business Analysts work directly with your staff. Since there is no middleperson, knowledge transfer is direct. This minimizes the opportunity for issues to arise due to misunderstandings and inadequate comprehension.
- Our work schedules clearly identify when we need ASBA staff, what staff is needed, and how much time is required of them. This helps the project run smoothly and progress without delays.

#### **B. Please describe any best practices that have been developed and/or adopted as part of your implementation and delivery methodology in other jurisdictions.**

Among best practices that we have adopted as part of our implementation process are the following:

- We do not move forward in the implementation process until each step is fully complete. Sacrificing quality early on leads to poor results later.
- At the outset of a project, we collaborate with our clients to identify acceptance criteria for deliverables. This ensures that all parties involved have a shared understanding of expected outcomes. We also help client staff review deliverables. This ensures that the Project Team stays focused and that project progress is timely.
- We encourage our clients to implement a "basic system" first, only adding "bells and whistles" later, after staff knows how the system works and what its extensive capabilities are.
- We have come to learn that the "train-the-trainer" approach to user instruction is ineffective for the initial go-live. As a result, we train end users directly.

### C. What risks do you see that can arise throughout the solution implementation and how would you propose to mitigate/manage those risks?

GL Solutions follows an established risk management process to identify, assess, and mitigate/eliminate project threats. We use an internally developed risk tracking system to identify and characterize risks and establish a mitigation plan. Our tracking system ensures that risks are visible and that active risks are discussed at weekly risk management meetings. What follows are some of the risks that could be encountered during the implementation of ASBA's system. Once we begin your project, we will develop a comprehensive assessment of risks and mitigations.

#### Information Exchange

**Risk:** Disruption of Project Team stability—client Subject Matter Experts (SMEs) and/or GL Solutions' Business Analysts (BAs) working on project could change over the duration of the project.

**Impact:** Missing or incomplete information; reduced project benefits; schedule delays.

**Mitigation:**

- SDS process ensures that all information is captured and knowledge transfer is complete and traceable.
- GL Solutions and client make every effort to ensure the consistency of staff working on project.

#### Communication

**Risk:** Failure of GL Solutions and client teams to communicate efficiently and effectively.

**Impact:** Missing or incomplete information; reduced project benefits; schedule delays.

**Mitigation:**

- Ensure open communications between BAs and client SMEs.
- Planned, reoccurring meetings between BAs and client SMEs.
- Take specific steps to validate documented business requirements with client SMEs.
- Frequent, joint process and software prototype reviews between BAs and client Project Team and SMEs.
- Involve Agency Partner in Status Meetings throughout entire implementation process.

#### Data Conversion

**Risk:** Effort and time allotted to data conversion could be prolonged because of source data and quality issues; previously unknown legacy data sources could continue to surface after initial identification.

**Impact:** Delayed implementation, missed deadlines; data that is unreliable or "dirty" and lacks sufficient data integrity for workflow processing; duplicate data records.

**Mitigation:**

- Use Data Conversion Plan to identify and define the numbers and types of data sources for business areas.
- In Data Conversion Plan, define communication and working strategy for Developer and client SMEs.
- Identify client SMEs that can be relied on to provide good data or logic for conversion.
- Review conversion from a user perspective, not a technical perspective

#### QA Testing – Compressed Timeline

**Risk:** Compressed timeline due to project milestone delays.

**Impact:** Testing processes and procedures reduced; new issues introduced.

**Mitigation:**

- GL Solutions and client develop a detailed Project Schedule and meet deadlines.
- Client team is flexible about QA testing deadlines when schedules have been delayed (by either party).
- Take action as soon as something/someone deviates from the schedule.

**QA Testing – Insufficient Understanding**

**Risk:** Incomplete or inaccurate understanding of client's processes.

**Impact:** System does not function as desired; system functions per specifications but not as desired.

**Mitigation:**

- QA team works closely with BA and PC teams to develop solid understanding of client processes.
- Assign QA and Development teams to work with BAs from the beginning to avoid potential issues with knowledge transfer.

**User Acceptance Testing (UAT)**

**Risk:** Failure of client to allocate adequate resources for UAT; failure of client resources to exercise system fully with various user and workflow scenarios.

**Impact:** System does not satisfy all agreed functionality.

**Mitigation:**

- GL Solutions trains designated client staff prior to beginning UAT to teach them how to test system.
- GL Solutions' Project Coordinator emphasizes the crucial nature of thorough UAT to client team.
- Client allocates adequate resources for UAT.
- Client staff executes thorough UAT.
- Develop specific UAT criteria to ensure system is fully functioning and stable before UAT.