

Sample ERP Project Report Card for the Defendant/Integrator

Abbreviations: G-L = Go-Live; KT = Knowledge Transfer; ND = Not Done; QA = Quality Assurance; QC = Quality Control; SI = Systems Implementor/Integrator/Vendor/Consultant hired to configure COTS/GOTS System

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NEEDS ASSESSMENT		BUDGET		RFP, PROPOSAL, COMMITTEE SELECTS SOLUTION; COMPARE SOL RQMTS W INV. – CORRECT SHORTCOMINGS		GO-LIVE DECISION	
Vendor delivers Key Managers promised in proposal/interview visit	D	Follow IT Best SDLC PM Methods (PMBOK, SWEBOOK, ISO 9000)	F	Best of SI by leverage/integrate talent to create predictable results	?	Appropriate delivery dates of G-L Training Materials	D-
Approp PM, PSC, PMO w industry/funct/SAP leadership/expertise	F	Root causes of delay, defects, delivery/qual issues fixed fast/right	D	We mobilize best people in right place at right time.	F	Quality SuperUser/EndUser Training & Reference Materials	D-
Stable and good staffing. Minimum Turnover (i.e., NO "Revolving Door/Take It/Leave it")	F	Fitting use of a well-staffed/established Project Steer Comm (PSC)	?	Commit to what we can deliver & we deliver on our commitments.	D	Relevant/working Sandbox available for SuperUser/EndUser practice	F
Vendor plans are based upon Customer experience and capabilities in SAP, Organizational Change Mgmt (OCM), System Migrations	F	Fitting use of well-staffed/established Project Mgmt Office	?	Leverage proven methods/capabilities to achieve delivery excellence.	C-F	Training/Job Aids thoroughly document Transaction Rules	C
This is a "Contract for Results ... NOT Resources"	ND	Select/proper use automated PM tools [i.e., SolMan, MS Project, etc.]	F	We help our people develop specialized skills ...	F	Training Schedules for End-Users to Ensure Readiness	D-
SI provides proper knowledge transfer to Process Team Leads/SMEs	D	Use of proper tried and tested estimating tools.	F	Being ethically honest ... inspiring trust by saying what we mean, matching our behaviors to our words	F	Training of Site Managers	F
SI has properly "seconded" Customer as promised	F	Revisiting/updating "estimate constraints & assumptions.	F	Prepare/provide accurate, timely, complete reports to clients	C-	Vendor's staffing, efforts, KT to ensure successful site readiness and implementation	F
Staff in key positions with needed experience/expertise: - Funct/Tech archs, analysts, designers; Test team; Specialists; Trainers	F	Clear, honest, best practice, timely, actionable progress/status rpts	D	BEST PRACTICES AND TOOLS		Super-User readiness to train End-Users in SAP	F
Specialists brought in as needed	D	Use of on-team/on-site/ongoing Quality processes & metrics	F	Approp QC tests of strategy, process, sched, resources, progress	ND	Super-User readiness to perform required transactions in SAP	D-
Quantity of staff and mixed skills adequate	C-F	QA Checklists that parallel proper methodology	F?	Appropriate use of methodology for industry-specific solution.	F	Configuration Mgmt System tested/works to properly move accepted code/config from Test to Golden Production Environment	F
Project Comm processes. Suitable teams meet as required to work on action items. Impacts shared upward. Silos avoided.	F	Proper best standards used to re-estimate progress, productivity, & revise proj resources, scheds, \$\$, deliverable dates (EVM/CPM)	F	Necessary sharing/use of requirements, design, data, conversion, implementation accelerators	F	System & Customer's readiness to G-L	F
SI has delivered appropriated training tools to Customer	F	Risks properly id'd, managed, mitigated, costed, reported, acted upon	F?	Expectations properly and honestly managed	F	POST GO-LIVE EXPERIENCE	
INVENTORY ASSETS & RESOURCES		Develop correct/effective/consistent/standard "vanilla" Customer business & functional rqmts upon which all other phases are based.	D	Proper "Stage Gate Promotions" when all requirements met	??	Readiness of Sites to Convert/Implement new Org Change Mgmt (OCM)	F
All contracted for work streams included in the estimate	ND	SUs have backfill to participate in all training & product test cycles.	F	QC approves test quality/coverage of "business & functional rqmts"	ND	Quality, accuracy, completeness of data at G-L	C-
Successful Completion of Mobilization Phase	F	FORM COMMITTEE(S)		QC & QA to review/approve testing/completeness of sys "-abilities"	ND	Test results reliability as a measure of G-L readiness	F
Achievability of target dates	D	Assign certified testing experts w environment, domain and product knowledge to plan, oversee, test, assure "proper" error fixes	F	Appropriate automated tools used, including Solution Manager and Microsoft Project.	C-	Correctness/Quality of previous Stage Promotions	??
Plants visited early in project to learn as-is, culture, to estimate OCM, training/post-GL assist needed	F	Testers are brought in early to review, approve the quality of the Requirements to be tested.	F	Conversion well planned & executed with correct results	D-	Planned overtime; No Staff Burnout	F
Schedules & estimates supported by apt Work Breakdown Structure	F	Test scenarios appropriately developed/executed per test plan	F	Interfaces developed, tested, documented/implemented to standards.	??	Extended period using Blackout forms and workarounds [over a month vs a week]	F
Vendor expert knowledge-transfer performed well	D	UAT (User Acceptance Tests) executed per plan	ND	Go-Live properly planned, managed & implemented	F	User acceptance/rejection proper, clear, & per agreement	ND
Conduct Process Team education (re design, critical biz processes)	F	An automated Regression Test Plan and Suite is established and used.	D-	Post Go-Live properly planned, managed & implemented	F	System acceptance/rejection proper, clear, & per agreement	ND
Deliver Proper Super-User education - (ABC's, Module, ready for End-User training)	F	Mock conversion data quality for testing is high & voluminous	F	SI delivered a viable Project Plan	F	FAILED SOLUTION	
Give Proper End-User training incl (ABCs, Process overview, Job Aids)	D-	Enough time for data & other teams to solve issues between each test	D-	Conducted a Controllable Pilot Test vs. Big-Bang Rollout for All of North America	F	All parts of the system have been tested and working	F
Prepare and "demonstrate" a Conference Room Pilot	D-	Enough training time/tools available for Data Quality process.	F	Gave good design recommendations to address Customer needs	D	Non-Excessive Defects Post GL	??
Develop appropriate sandbox for Process Teams to explore in the Analyze phase and use to participate in the Design Phase.	F	Perform full dry to test hi-quality, full data volumes, to id issues/downstream impacts of data design/loading.	F	OVERALL GRADE		"Vanilla" SAP Solution w "industry leading practices"	F
Proper Assignment of Primary v Secondary Roles	D-	Use of "static testing": Reviews; Walk-throughs; Inspections	ND	SI clearly and honestly reported Readiness for Deployment	F	Known Quality of fixes after Root Cause analyses	??
Requirements properly elicited, documented & managed ("As-Is")	D-	Qual/Deliv exceptions made as necessary; risks id'd/proper sign-off	?	Understood/correctly reported G-L Risk Level.	F	Systems Performance KPI's Metrics are met	F
Customer knowledge contribution to Specific Fit/Gap Understanding Analyses, & review the Vendor designs	D	Prototypes, hands-on training, practice and learning Sandboxes	ND	Short cuts taken, inexperienced staff, poor reqmts, shoddy design, inconclusive testing, poor training, unaudited data, & Big-Bang rollout doomed project G-L stability, usefulness, promised savings & success	F	Business Case is met	F
SI expert knowledge of industry and SAP solution vanilla abilities and alternatives	D-	Proper systems & testing documentation/tools, and regression test suite transferred to Maintenance	ND	If continued along same SI path, meeting stakeholder expectations will take years to complete with dubious quality.	F	System meets required "abilities"? (Scala-, Porta-, Usa-, Secura-, Audita-, Testa-, Relia-, Maintaina-, Regulations, Upgrada-)	??