

STATE OF MAINE IV&V REVIEW – PLAN PHASE JANUARY 2019



IV&V REVIEW OBJECTIVES

As an IV&V consultant, our goal is to be an objective, independent, neutral third party advisor. We make observations and recommendations collaboratively with the client, with project success as the outcome. It is a partnership model where IV&V provides tangible measurement and alternatives to the existing performance of the project as well as helps to identify issues which may not be visible. To ensure the implementation project remains on-track and expected benefits are realized requires consistent and independent oversight. Therefore, our approach to IV&V not only focuses on the quality of deliverables and activities, but on the value of these activities and whether they contribute to successful system deployments.

SCOPE OF WORK – IV&V REVIEW

There will be Five Stage Gate Reviews performed during the project. We have estimated that each review will consist of the same set of activities (e.g., document review, onsite interviews, report preparation and delivery) and consume an equal amount of effort. The following is the estimated timeline for each Review:

- IVV Review #1 - Planning Stage (January 2019)
- IVV Review #2 - Architecture & Design Stage (April 2019)
- IVV Review #3 - Configuration & Prototype Stage (August 2019)
- IVV Review #4 - Testing Stage (early December 2019)
- IVV Review #5 - Deploy Stage (Pre Go-Live/December 2019)

SCOPE OF WORK IV&V REVIEW



Twelve Focus Areas/Sessions for each review

(More emphasis will be given to specific areas based on the Phase being evaluated)

1. Executive Sponsorship
2. Project Governance
3. Business Processes
4. Organizational Change Management
5. System Design, Development, and Documentation
6. IT and Architecture
7. Data
8. Testing
9. Internal Control Compliance
10. Vendor Contract Compliance
11. Benefits Realization
12. Business Readiness

WHO WE MET WITH

Executive Sponsor – David Whitt



Project Management Team – Debra Arrington, Nicole Drisko, Aleena Plummer, Matt Watkins/PM Workday



Technical Leads – Brad Achorn, Nicole Drisko



OCM/Accelare – Brendan Mclaughlin

STATE OF MAINE – EXECUTIVE SPONSOR

Observations:

- Feeling good about the project team's resources, key business lead in place for SOM
- Workday relationship is strong, there is a defined escalation path, getting proper executive attention at this time
- Premier Consulting doing a solid job with data conversion activities
- Project Management team working well together
- Legislative Branch is onboard

Key Risks Identified:

- Defining standard business processes and ensuring its adoption across the State's workforce
- New Administration with changes in leadership and increased scrutiny on the project.
- New Commissioner (Kirsten Figueroa) and several other roles have turned-over. These new folks will have to learn about and support the project going forward.
- State of Maine escalation path not clearly defined with new Administration and will have to define one.

Project Risk Rating (R/Y/G) is Green

STATE OF MAINE – PROJECT MANAGEMENT TEAM

Observations:

- Project Governance – solid process in place with daily/weekly meeting cadence, status reporting, project plan, issue and risk logs and Delivery Assurance QA team checkpoints defined. Project Management tools in place including Sharepoint repository and planning tool.
- Escalation Process with John Eckroth escalation point for Workday as lead Delivery Exec.
- Resources – Onboarding process defined with reviews/approval/removal procedures in place
- Scope Control/Change Management – Change Order review/approval process in place. No significant CR's created that contain cost increases
- Stage Gate Entry/Exit Criteria – acknowledgement that this must be defined for each Stage but project team has yet to do so
- Project Financials – fixed price contract, vendor billing based on pre-defined milestones, SOW definitions and schedule
- Workday resource staffing plan in place, roles are filled with majority of team onboarding in January.

Key Risks/Actions Identified:

- Publish the project's escalation processes – both with Workday and State of Maine leadership
- Three key project roles remain unfilled – Maine Integration Lead, Maine OCM lead, Maine Training Manager
- Confirm a formal Sign-Off process for specific project deliverables – process exists for Stage/Milestone level but one should be put in place for the desired/required Deliverables

Project Risk Rating (R/Y/G) is Green

STATE OF MAINE – TECHNICAL TEAM

Observations:

- Brad Achorn installed as new IT lead working out well and brings valuable legacy systems/data warehouse experience
- Data Conversion efforts have been successful so far with Premier Consulting despite early delays in contracting
- Resources – Maine, Workday and Premier consulting teams in place and working effectively and collaboratively
- Viability Workday Technical landscape and system architecture “too early to evaluate”
- Effectively managing co-dependencies with Enterprise Data Warehouse project
- Integrations defined process in place to manage development
- Successful delivery of the Workday Foundation Tenant

Key Risks/Actions Identified:

- Filling the Integration Lead role
- **Project Risk Rating (R/Y/G) is Green**

STATE OF MAINE – OCM/ACCELARE TEAM

Observations:

- Accelare is a boutique OCM consulting firm that has partnered with Workday on other implementation projects, they are subcontracting to Workday and reporting to Matt Watkins for daily direction.
- Just completed and delivered the OCM Deliverable to the State which contains OCM plans, Service Catalogues, Personas and business process inventory.
- Workshops conducted with SOM Agency representatives went well, excellent participation and commitment including Legislative and Judicial branches.
- Agency leads/champions have been assigned to the project and are working effectively.
- Aggressive, ambitious project timeline but achievable.

Key Risks/Actions Identified:

- Maine OCM team still forming and didn't get to attend all of the workshops. Maine Training Lead not yet onboard
- The Workday S2E Change Management Deliverable published on 12/19/18 included a responsibility chart that has Maine assuming a leadership role for key Training tasks (see the Orange labelled tasks listed on page 25 of the OCM presentation). Workday resources plan to "support" the completion of these tasks, but the specific work responsibilities from each side are not clearly defined either in the SOW or in this document. Training is a critical component of this project and it is imperative that both parties review this workstream in detail and agree on the specific working responsibilities, tasks and deliverables needed to complete it.
- Diverse SOM workforce will create OCM challenges for communications and training
- Length of time for Maine to review/approve project Communications

Project Risk Rating (R/Y/G) is Green

STATE OF MAINE – OVERALL SUMMARY

Project Risk Rating is **Green**

Panorama recommends the team move forward into the Architecture and Design Stage

The following items should be addressed and resolved:

- Team Staffing – Fill open roles ASAP (OCM Lead, Integration lead, Training Manager)
- OCM Deliverable Review and Approval by Maine staff
- End User Training Workstream - work tasks, deliverables, resource roles and responsibilities must be properly clarified and understood by both parties



QUESTIONS