

RFI RFP Processes – Achieving Best Practices, Solution Assessment & Business Transformation

Canadian Information Processing Society

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Presentation Description

This presentation will review the best practices for managing the RFI and RFP processes using a decision making framework.

The presentation will show how Use Cases can be employed to support functional requirement assessment and achieve an objective "apples to apples" comparison between different software packages.

The end objective from this process is to select a solution which best suits the business needs and supports the successful implementation of the package.

The selection process and actions will also position the organization for implementation and the "Cultural transformation" associated with a package.

Agenda

- 👉 Presentation Learning Objectives
- 👉 Presentation Scope Review within a business continuum
- 👉 Defining a COTS
- 👉 Functional Requirements and Use Cases
- 👉 Package Enabled Business Transformation Process
- 👉 Use Cases and Objective Evaluation
- 👉 Questions & Answers

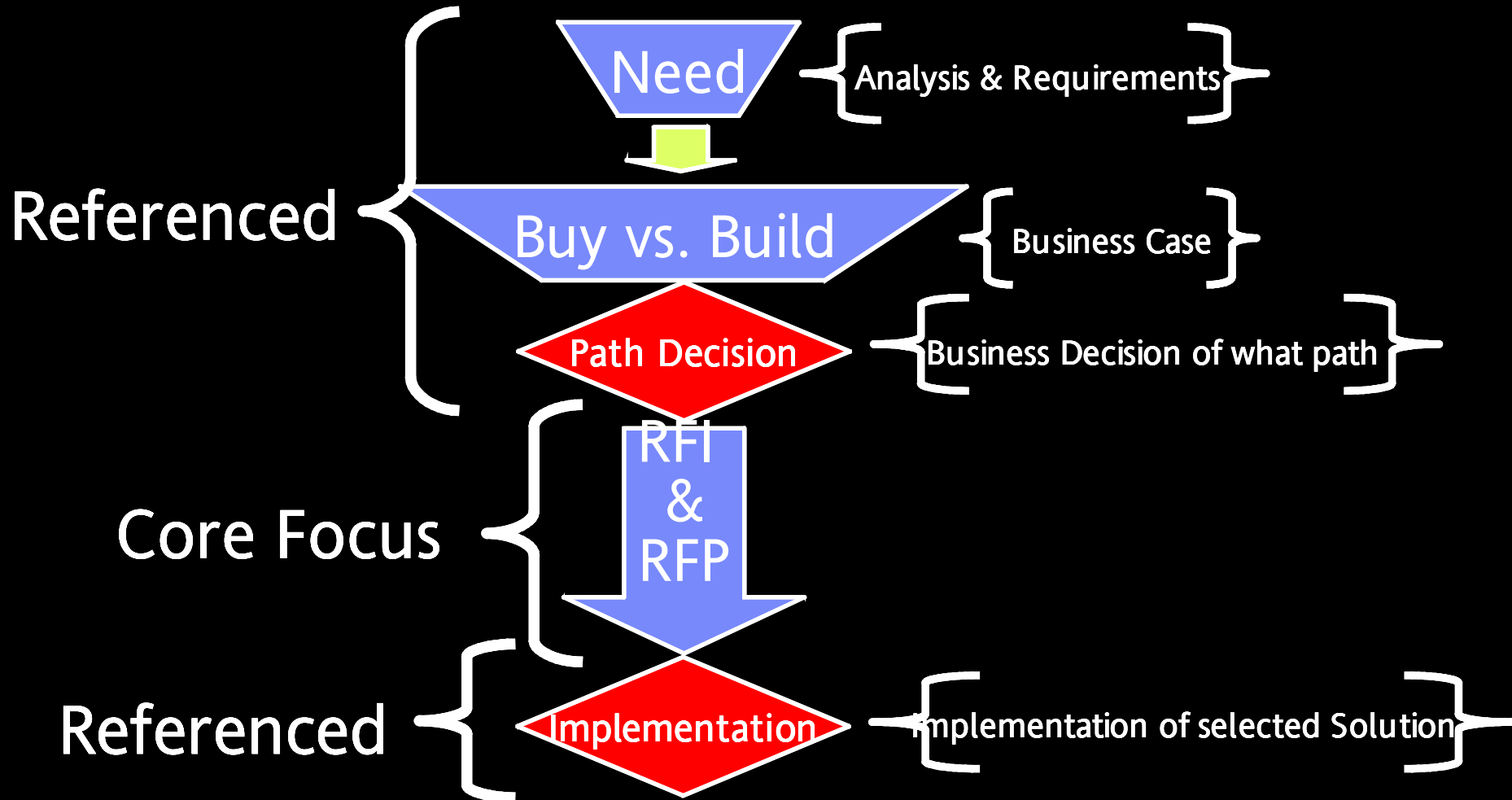
Presentation Learning Objectives

After the presentation the Attendees will be aware about.

- 🐞 The High-level best practice path and activities for an RFI/RFP.
- 🐞 What “COTS” (Commercial Off the Shelf) software is and the implications of pursuing this path.
- 🐞 The use and advantage of Use Cases in conducting an objective “apples to apples” comparison between software applications that can have significant variance.
- 🐞 How to use the activities of the RFI / RFP process as a framework to support the implementation.

Presentation Scope Review

The focus is on a partial set of activities within a larger business continuum:

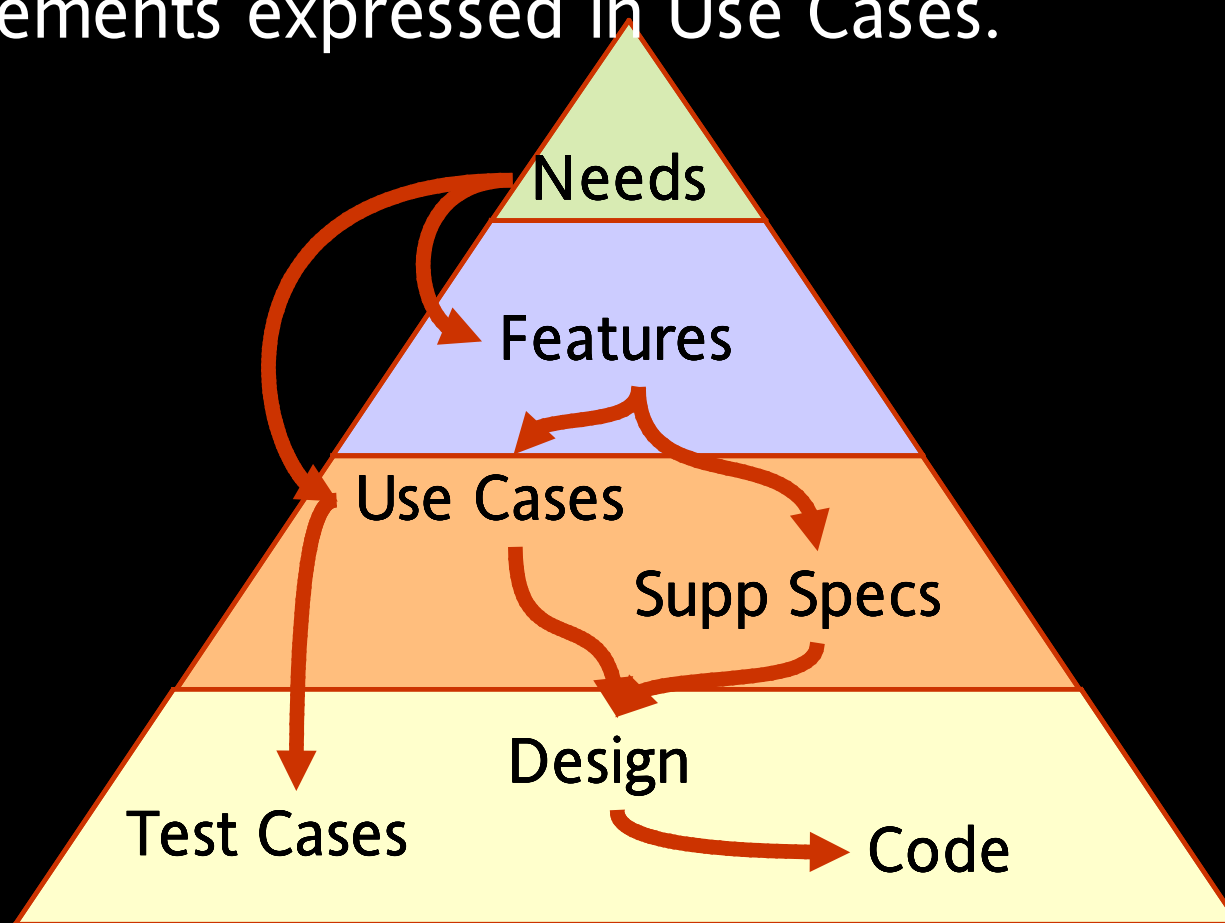


Defining a COTS: This content was deemed IBM confidential and needed to be removed.

Functional Requirements & Use Cases

Functional Requirements Traceability

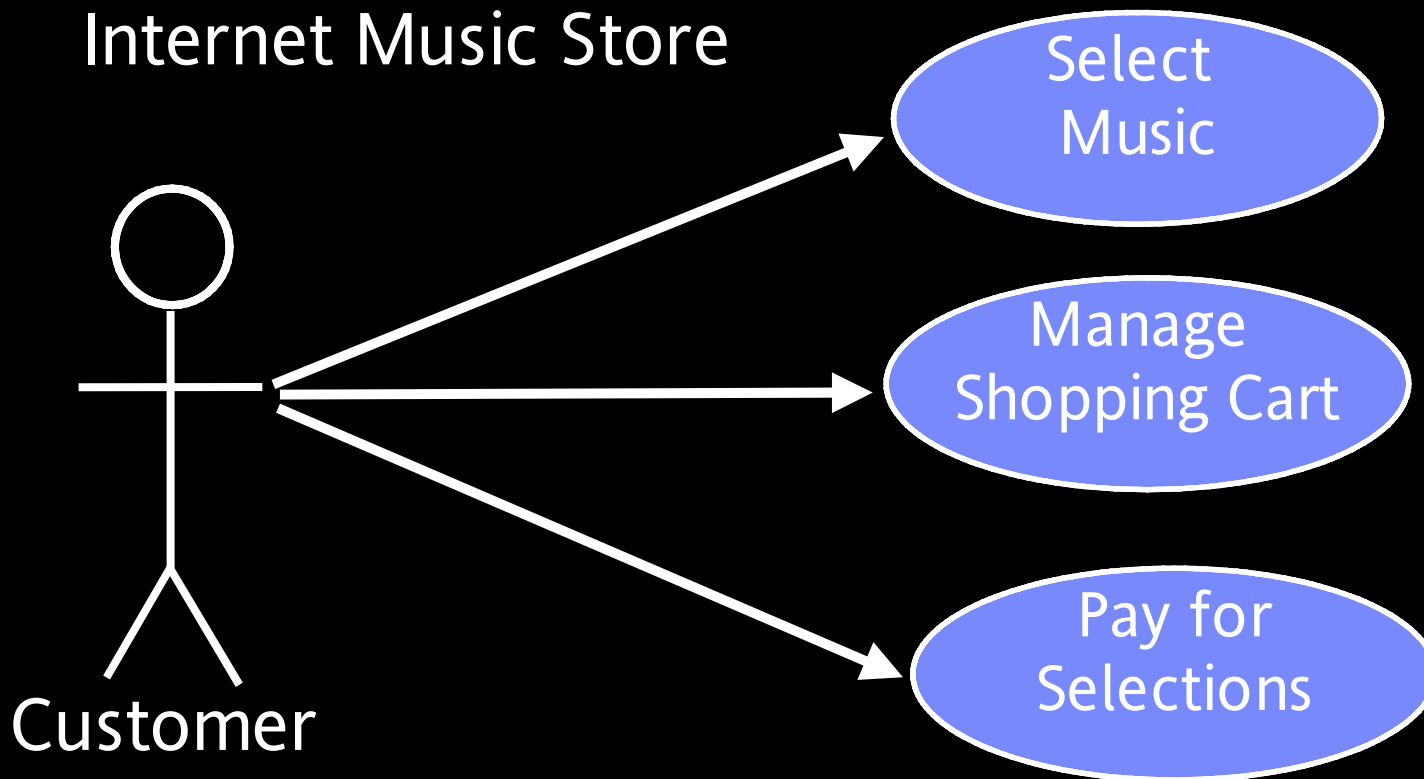
Business Objectives and needs result in Functional Requirements expressed in Use Cases.



System Use Cases are:

Simple Models showing Actors and the units of functionality.

Internet Music Store



Some Definitions related to use-cases

Use-Case Model

- A use-case model shows visually the actors and their dominant goals to be achieved through the system

Use Case

- A use case describes a set of actor interactions with a system that yields an observable result of value to the actor

A flow

- A flow that describes a set of steps between an actor and a system

Basic flow

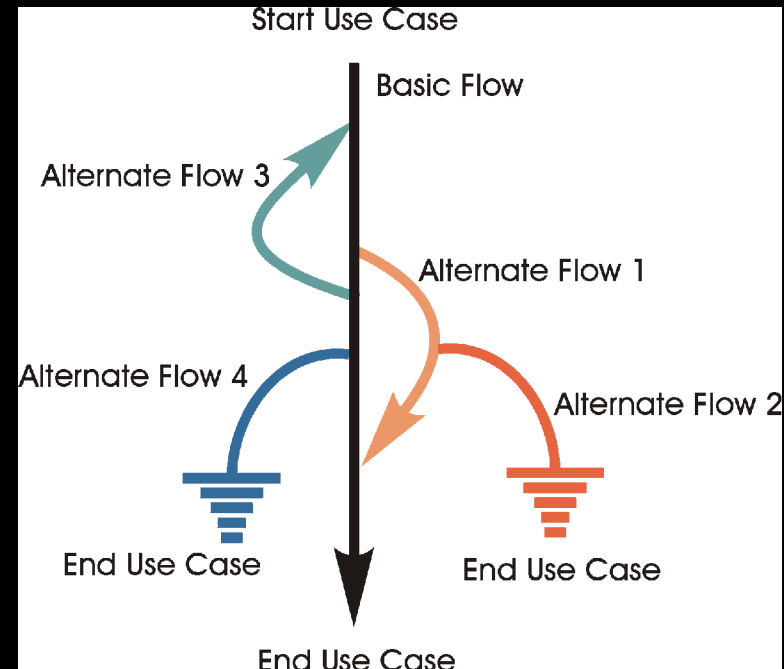
- The flow that describes what the most common usage of the system will be

Alternate Flow

- A flow that describes steps that deviate from the basic flow due to other means of achieving the goal, errors, etc

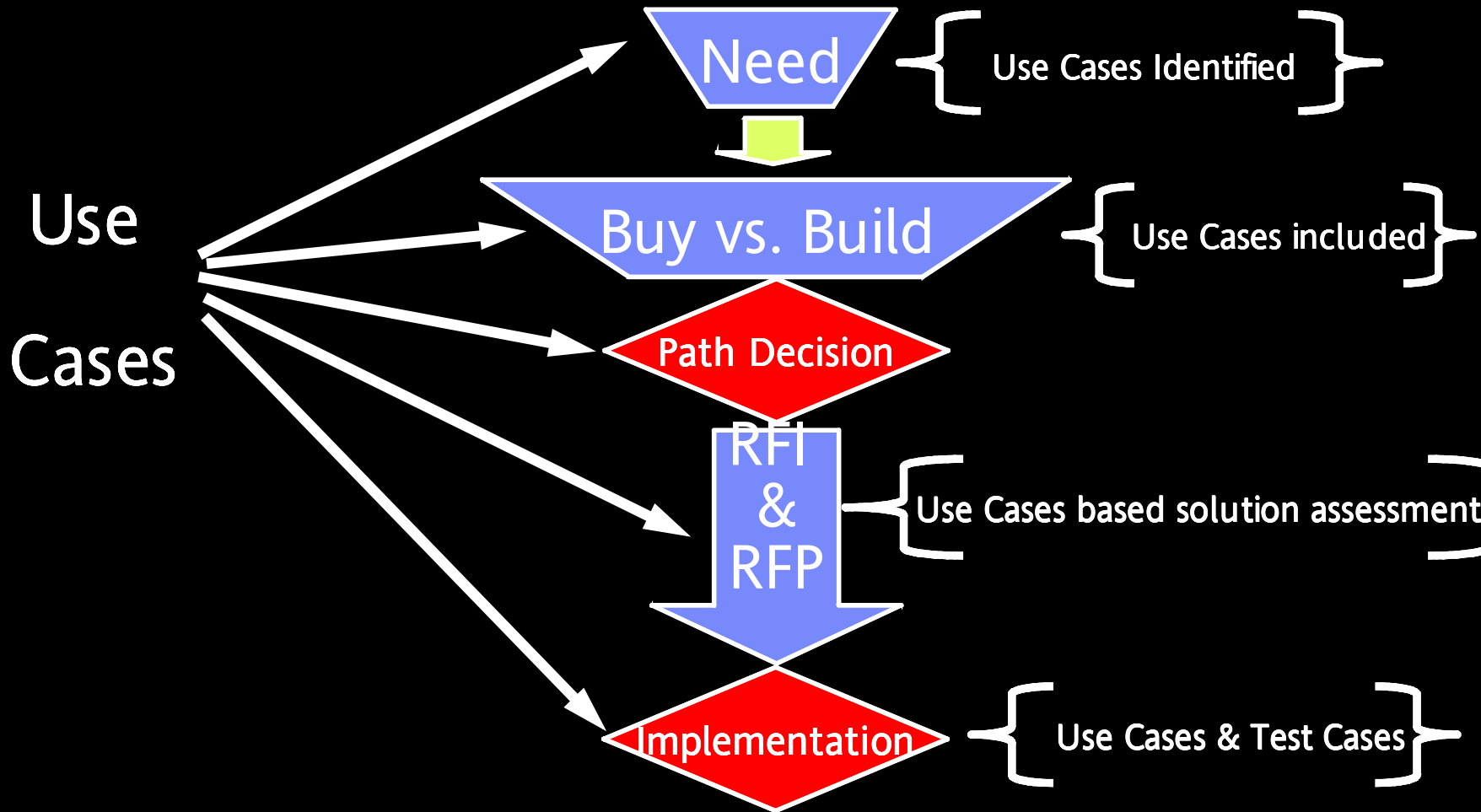
Scenario

- An example with concrete data of one path through a use case, usually exercising portions of the basic flow and one or more alternate flows



Use Cases In Business Continuum

Use Cases are used, reused, redefined, and translated in the process :



Best Practices Approach for Package Selection

Start Project

Key Activities

➤ Define Scope

- Scope Statement
- Project Governance
- Solution RFP or a Solution and Implementation RFPs

➤ Project Resources

- Critical Skills and Knowledge sets required
- Core Business Skills and IT Skills

➤ Project Methodology & Plan

- Understand the scope, complexity and degree of difficulty
- Employ all previous work (business case, needs assessment, etc.)
- Identify all activities and project processes / artifacts based on this

➤ Establish Change Management

- Ready for Change
- Prepare Communication frameworks
- Engage stakeholders

Current State

Key Activities

➤ Define / Understand Business Environment

- Vision
- Goals/Objectives
- Critical Success Factors

➤ Assess the Current Business Environment (“As Is” processes)

- Major Processes and Use Cases (Can Build on initial Analysis work)
- Issues & Opportunities

➤ Prioritize Processes

- Identify business processes that directly / indirectly contribute to the achievement of the Goals and Objectives
- Assess performance of Processes – identifies the area with the best opportunity for improvement

➤ Assess Current IT Environment

- Infrastructure – server / PC
- Applications
- Architecture

Define the Future State

Key Activities

➤ Define Future Business Vision

- Structured Brainstorming – includes filtering and classification of ideas
- Best / Leading Practices – by process and industry – what should be adopted? This can be achieved through external resources

➤ Define the Future Processes ('To Be')

- Future Process capabilities – How will the critical business processes behave in the future
- Define the Future Use Cases for Requirements – detailed set of flows, business rules and data that reflects the business's current and future needs, includes relative priorities
- Create the Use Case based Decision Model – identifies the relative importance of each of the Use Cases, flows and business processes in the selection of the software solution

Select Solution / Package

Key Activities

➤ Create / Issue RFP

- Pre-qualify vendors based on high level requirements
- Create RFI / RFP – issue to limited set of vendors

➤ Create Demonstration Scripts

- Based on Use Cases and Scenarios – What you want to see, not just what vendor wants to show.
- Detailed demonstration script that provides the vendor with a sequenced list of presentation steps.

➤ Review Proposals / shortlist Vendors

- Evaluate solutions with Use Cases and processes that directly / indirectly contribute to the achievement of the Goals and Objectives

➤ Document Solution Gaps

➤ High level Costs / Benefits Analysis

- Total cost of ownership
- ROI – amounts and timeframes with measurement metrics

Redesign Processes & Solution

Key Activities

- Vendor Review Gap Analysis
 - Work with vendor to define and fill all Use Case and Process gaps.
 - Perform all gap analysis work prior to hard implementation.
- Vendor Review Architecture
 - Identify and establish the environments required.
- Select Implementation Methodology & Plan
 - Use an Iterative Incremental and Agile approach if at all possible.
 - Vendor and solution may bring process requirements.
 - Consider if further implementation or change management help is required.
- Establish Implementation Team
- Enact Change Management
 - Employ the Use Cases and Process gaps and change points from “current state” to drive change plan, map changes prior to implementation.
 - Develop a Communication Plan and involve Employees.

Use Cases & Software Selection

Use Cases support Software Selection

- 👉 Use Cases are interface agnostic.
- 👉 Use Cases do not define the solution.
- 👉 Solutions can be reviewed for conformance to Use Cases.
- 👉 Use Cases can be assigned ranking, and associated weighting.
- 👉 Use Cases have flows which allow for granular analysis of features.
- 👉 Flows can be ranked and weighted.
- 👉 Weightings should be based on business value and return.
- 👉 Weighting statements can be assigned a scoring.
- 👉 A Vendor's solution can be compared to the flows, and the scenarios identified.
- 👉 Solution Review and Use Cased based evaluation occurs in Step 3 Select Solution.
- 👉 Nonfunctional requirements can also be scored and weighted along with Use Cases to derive an overall functional / nonfunctional solution score.

Use Cases Assessment Framework

A Spreadsheet can be used as the tool to support an objective assessment.

Key Components are:

➤ All Use Cases and Flows

- All of these would be weighted and ranked based on business value and contribution to future state benefits.
- Develop a “Set” of Qualitative sentences which can be used to express the value of the flow. Humans assess better with words than numbers.
 - Allows participants to focus on developing and agreeing to a definition and the business value of the Use Case or Flow.
 - Can consider if this is an exiting or net new flow and what is the value proposition.
- Multipliers are assigned to the qualitative sentences to mathematically express the weighting.

Use Cases Assessment Framework

➤ Use Case and Flow Qualitative Alignment Expressions

- A “Set” of Sentences which can be assigned to a software solution that reflect how that solution aligns with the Use Case or Flow.
 - Examples: The Application exemplifies the Flow and requires no additional functionality; the Application is generally congruent with the Flow but lacks some business rule capability; the Application has poor alignment with the Flow; the Application does not have the Flow.
- A numeric value which is assigned to the Qualitative statement.

➤ Application Score

- Is a calculation of the Qualitative statements selected for the flow or scenario against the multipliers assigned for the weighting of the Use Case or scenario.
- Therefore, for each vendor the Flow Value x Qualitative Statement score = Vendor Score for that particular flow.
- Can be expressed as an X out of Y.

Thank you for your time

Q & A

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