

eMentoring Brief

Version 1.6

Commercial Off-the-Shelf (COTS): Drive to Fit Framework

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Game Plan

Stage
Analyze
Design
Construct
Deploy

Goal: A well thought-out and successful COTS implementation

Stage

Done	Action	Notes
<input type="checkbox"/>	Analyze and engage stakeholders	
<input type="checkbox"/>	Generate business case (business needs, functions, interfaces, organization, lifecycle, technology, users and environment and ROI)	
<input type="checkbox"/>	Perform package selection process (identify, evaluate, select, and manage COTS vendor)	
<input type="checkbox"/>	Define and document goals and scope	
<input type="checkbox"/>	Generate project plan and define resources	
<input type="checkbox"/>	Define project organization including roles and responsibilities	
<input type="checkbox"/>	Select team members and consultants	
<input type="checkbox"/>	Develop, document, and communicate strategies, assumptions and standards	
<input type="checkbox"/>	Schedule project meetings, initiate status reporting and change control processes	
<input type="checkbox"/>	Prepare team training plan	
<input type="checkbox"/>	Assess risks, develop mitigation plan, manage and monitor daily	
<input type="checkbox"/>	Generate and review issue log – identify, document and work issues	
<input type="checkbox"/>	Identify user representative and SMEs	
<input type="checkbox"/>	Conduct kickoff meeting	
<input type="checkbox"/>	Initiate change management activities such as communications plan, organizational “to be” readiness/impacts and end user training activities (plan, schedule, documentation and measurements)	

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Stage (Continued)

Done	Action	Notes
<input type="checkbox"/>	Engage business process owners	
<input type="checkbox"/>	Inventory and document business processes	
<input type="checkbox"/>	Document "as is" architecture	
<input type="checkbox"/>	Define "to be" technical architecture	
<input type="checkbox"/>	Size and validate COTS system	
<input type="checkbox"/>	Initiate change control activities	
<input type="checkbox"/>	Manage project, conduct status meetings, prepare status reports, and chair steering committee meetings. Manage project using plans and checklists	
<input type="checkbox"/>	Generate cutover plan (and checklists)	
<input type="checkbox"/>	Define user success criteria	
<input type="checkbox"/>	Initiate go-live readiness assessment	
<input type="checkbox"/>	Conduct go-live readiness review using a scorecard approach	
<input type="checkbox"/>	Establish and manage help desk support	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Analyze

Done	Action	Notes
<input type="checkbox"/>	Define detail requirements based business needs	
<input type="checkbox"/>	Define "to be" processes leveraging standard COTS functionality – identify and document gaps and alternatives for possible mods and workarounds	
<input type="checkbox"/>	Define, justify, and document requirements including reports, screens, interfaces, conversions, enhancements, extensions, legacy data cleansing, infrastructure, network security, and all non-functional requirements	
<input type="checkbox"/>	Validate COTS package decision	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Design

Done	Action	Notes
<input type="checkbox"/>	Develop and document detailed configuration design and decisions made	
<input type="checkbox"/>	Validate configuration design	
<input type="checkbox"/>	Engage SMEs (new processes, designs and workarounds)	
<input type="checkbox"/>	Address and justify how gaps will be closed	
<input type="checkbox"/>	Develop detailed designs for reports, screens, interfaces, conversions, enhancements and extensions	
<input type="checkbox"/>	Develop and document end user training requirements, plan, schedule, materials and facility	
<input type="checkbox"/>	Identify and address skill gaps and monitor knowledge transfer activities	
<input type="checkbox"/>	Conduct configuration audit and issue report	
<input type="checkbox"/>	Prepare contingency, continuity and backup plans	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

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Construct

Done	Action	Notes
<input type="checkbox"/>	Configure COTS system	
<input type="checkbox"/>	Engage SMEs/end users in testing process	
<input type="checkbox"/>	Perform COTS unit, integration, end-to-end and operational readiness tests	
<input type="checkbox"/>	Test all reports, interfaces, conversions, enhancements and extensions components	
<input type="checkbox"/>	Test non-functional requirements	
<input type="checkbox"/>	Test security, network, infrastructure and printers	
<input type="checkbox"/>	Report, document and fix defects	
<input type="checkbox"/>	Develop system administration procedures	
<input type="checkbox"/>	Document and establish security profiles	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Deploy

Done	Action	Notes
<input type="checkbox"/>	Execute cutover plan (and checklists)	
<input type="checkbox"/>	Complete and document final configuration	
<input type="checkbox"/>	Evaluate system against requirements	
<input type="checkbox"/>	Perform volume and stress tests	
<input type="checkbox"/>	Conduct final readiness review with vendor	
<input type="checkbox"/>	Execute change management activities and training plan	
<input type="checkbox"/>	Establish and staff war room	
<input type="checkbox"/>	Perform final go-live steps	
<input type="checkbox"/>	Implement business processes, technical support and system help desk activities	
<input type="checkbox"/>	Conduct lessons learned and issue log review sessions, identify additional training requirements and areas for improvement	
<input type="checkbox"/>	Thank the implementation team, sponsors, stakeholders, and SMEs for their efforts	
<input type="checkbox"/>	Maintain licensing and SLA fees	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Think About...

Project Management:

- ✓ Quality, cost, schedule, people, and performance concerns
- ✓ Execute structured project management and deployment methodologies
- ✓ In the project plan, capture the scope of the initiative, support the established methodology, execute phases and tasks that are distinct and sequential
- ✓ Architecture will be an ongoing issue, both software and hardware
- ✓ Engage sponsor, stakeholders, SMEs, and users throughout the project
- ✓ Assess organizational readiness and maturity as the project evolves
- ✓ Recalibrate plan, scope, resources, and technology after every phase

Vendor Selection:

- ✓ Architecture
- ✓ Functionality
- ✓ Compatibility
- ✓ Features
- ✓ Affordability

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- ✓ End user productivity impacts
- ✓ Vendor track record, references, licensing options (license, subscription, and royalty fees), plans, press releases and reputation. Always check vendor references

Implementation:

- ✓ Levels of coupling (stand alone, integration(minimal changes), customization (modest enhancements with vendor support), and development (major enhancements without vendor support)
- ✓ Coupling level drives development methodology

Product Direction:

- ✓ Business needs vs. product evolution
- ✓ Current and future direction
- ✓ Scalability, performance, and platform

Vendor Relationship:

- ✓ Type of relationship (partner, VIP customer, and anonymous)
- ✓ Stability including price, terms, support, and upgrades
- ✓ Vendor level of commitment