B1

Field Guide: Project Introduction

BRIDGE

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Contents

Document Reference Table

Through-out the Field Guide documents for the BRIDGE delivery process there is a reference to technical documents that are utilised throughout the process. To make it clear the full list of those documents and their purpose is the following table:

Document Name	Description
System Specification	Describes the functionality of the CORE system at time of purchase
Import Template	Defines the acceptable format for data that is to be migrated into the system. It is the responsibility of the client to ensure that the data provided in this template is adhering to the format defined by EBMS and that the data is clean.
Feedback Template	Defines the acceptable format for feedback that is provided to EBMS regarding the design of the CORE system that is being delivered. Feedback provided in this will be categorised and effort allocated against those. The changes will then be the basis of the Statement of Work document.
Statement of Work	Describes the changes and customisation to be done to the CORE system. Depending on the parameters of the sale there may be a pre-approved budget allocated to this document – if the pre-approved value is exceeded than either changes need to be dialled back or additional charges may apply.
User Manual	Describes how to work through standard workflows in the system. This documented is targeted at users of the system and can be used as a guide to run an end-to-end process. This document does not cover every possible action in the system.

1. A BRIDGE Introduction

The EBMS BRIDGE Methodology is an abbreviated process designed for Off-the-Shelf systems. For more complex implementations, the SIMPLE methodology should be recommended instead. The foundational difference (using residential construction as a metaphor) is that with BRIDGE we start with a mature product and then do the necessary 'renovations' to ensure the solution fits your requirements. This is in contrast to SIMPLE where we will start with 'a block of land' and configure (build) your ideal solution from the ground up.

1.1. Project Introduction

To ensure the success of this approach, it is important to appoint your team that will be responsible for reviewing your internal requirements and compare it to the functionality offered by our Core solution. Note, BRIDGE Methodology does not include a Business Analyst resource.

The rest of this document briefly explains the main stages which form part of the BRIDGE Implementation Methodology.

2. Bridging the Gap - Introduction

The main objective of this phase will be to gain clarity and to define the difference between your requirements and the native functionality already included in the Core solution.

2.1. Stage 1: Gap Analysis

This stage starts with providing you with a basic system for you and your team. The intention is for you to explore, to play and to review this system to understand the 'gap' between your process and that of the system. This will enable the creation of a list of changes which we will need to configure to ensure a perfect fit. The number of changes that can be implemented will depend on the size of your change budget.

	Step	Detail
HOMEWORK	Onboarding	Onboarding
	Initial Homework	Initial Homework
	Kick-Off	Kick-Off
	Gather Import Data	EBMS to send import templates. You are to provide a data extract (understood that this may take several weeks), and optionally any notes on the system specification document of the Core Solution – depending on the complexity of any feedback the feedback may be incorporated into the system in preparation for the user orientation.
ORIENTATION	Core Provisioning	Once you have supplied the data for import, providing the data matches the import templates, then we can expect roughly a 1-week lead time to configure and set up the system. If there are complications or additions in the import template, this may affect the 1-week lead time.
	User Orientation	Once the system is set up, we will schedule a 1-hour session for initial handover user training.
REVIEW	Core System Review	From here you have two weeks to use the system and, if you have approved a budget for customisation as part of the project, a list of feedback can be compiled and sent for EBMS to review.

Further detail can be found in **Field Guide B2: BRIDGE – Gap Analysis (Stage 1)**

2.2. Stage 2: System Tailoring

Once EBMS receives your feedback, we will itemise it as a list of changes with a cost associated with each item. You will be permitted to choose changes to the value of your change budget. If your change budget is insufficient you will either need to pare back your list or increase the budget.

	Step	Detail
FEEDBACK ASSESSMENT	Feedback Assessment	Once feedback is provided, EBMS will evaluate the effort required to meet the feedback items and will compare against the configuration budget.
	Budget Control	If items do not all fall within the budget, then we will go through a negotiation process.
CHANGE IMPLEMENTATION	Implementation	Once feedback is processed, we will configure the changes into the system. The duration will be relative to the amount of agreed changes.
	Refresh Data Migration	Data is reimported into the updated structure for review.
	Change Implementation Review	With all the feedback items implemented, we will do a final handover session covering the feedback items and any other queries.

Further detail can be found in **Field Guide B3: BRIDGE – System Tailoring (Stage 2)**

2.3. Stage 3: Go Live

Any final user training will be completed during this phase, after which the system will be released into Production.

	Step	Detail
LAUNCH	Training	We will train your key users and trainers on how to use the system, providing enough information for you to then train the rest of your staff. You can also choose to purchase additional training sessions if needed.
	Release to Production	Your system will be put into a production environment, ready for users.
EVALUATE	Warranty	You enter a 3-month warranty period where any bugs found in the system will be fixed for no charge.

Further detail can be found in **Field Guide B4: BRIDGE – Go Live (Stage 3)**

3. Your Team

3.1. Project Core Team

There are two core project roles that need to be filled in your team:

Role	Responsibilities
Project Manager	• Manages client resources • Makes sure that tasks are completed on time and on budget • Monitors and reports on project progress and performance (schedule, cost, quality and risk) • Reports and escalates project issues • Meets regularly with EBMS Account Manager
Business Analyst	• Provides consolidated business requirements to EBMS • Consulted on clarification of feedback • Reviews feedback from your staff and provides this in a consolidated and agreed form to EBMS

In small projects, it is possible for these roles to be filled by the same person if they have the requisite skills.

3.2. Sponsor

Your Project Sponsor is the principal owner of the project. They are usually a senior manager, the person who is funding the project, and is the main supporter of the project.

Key responsibilities:

- Defining the Vision and Objectives for the project
- Approving Requirements, Project Plan, Resources and Budget
- Ensuring that major business risks are identified and managed
- Approving any major changes to the scope
- Resolving issues escalated to them by the Project Manager
- Ensuring business and operation support for the project
- Signing off final acceptance of completion

3.3. Supplementary Team Members

In addition to your core team there are some other team members who play a very important part but may not be involved in your project on a daily basis.

Role	Responsibilities
Subject Matter Experts	• These are the people with the most expertise on the system domain. If you are implementing a procurement system, bring procurement experts. For Risk, bring Risk experts, etc. • EBMS are the experts in building systems, but we need your expertise on what process rules need to be met to fulfill your unique requirements.
Information Technology (IT) Representative	• Involve IT right away. • Ask for someone to be assigned to your team. • This person only needs to be included in some parts of the project, but the earlier they can be involved the easier it will be for everyone. • This person will consult on what equipment, software and IT policies need to be managed.
Representatives of Impacted Areas	• You can achieve greatest buy-in by involving representatives from the start. If you only involve them at the latter parts of the project, you will find much greater change resistance. Communication is key.

4. EBMS' Team

EBMS will assign a team of staff to work on your project.

Role	Responsibilities
Account Manager	Your Account Manager is responsible for: • Being the escalation point for unresolved issues • Monitoring the overall health and status of the project
Project Manager	Your Project Manager is your first contact point for questions, issues and information. They are responsible for: • Project schedule development and updates • Providing you with project methodology documentation • Facilitating communications and meetings involving EBMS staff • Working with you to manage the scope of your project • Managing Project Risks and Issues
Technical Lead	The technical lead will build and configure the system. They will often make use of additional team members to do aspects of the work. For a BRIDGE implementation they will assess, provide feedback assessments and costings. They are responsible for: • Assessing feedback items • Designing and building the delivered system • Writing user manuals • Running training sessions • Assigning and monitoring team members

5. Read More

The next guide in this sequence is B2 – Gap Analysis.

Document	Title	Content
B2	BRIDGE – Gap Analysis	Explains how to explore and define the list of changes which will align with your requirements.
B3	BRIDGE – System Tailoring	Explains the process to implement and reviewing the changes made to the solution.
B4	BRIDGE – Go Live	Explains Training and Release to Production.

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