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1. Bridging the Gap

The purpose of this document is to guide you through the Gap Analysis stage of the BRIDGE Implementation methodology. It is a very important stage because the outcome will ensure we make the necessary changes that correctly reflect your requirements. It is important that you succeed in doing a robust analysis and review of the system and to effectively communicate the details of the changes you wish us to make to the system so that it fits your requirements. The ultimate output of this stage is a signed-off Statement of Work document which will specify the alterations and changes we need to configure relating to your solution.

	Step	Detail
HOMEWORK	Onboarding	The signing of the proposal and procedures required for Vendor onboarding.
	Initial Homework	EBMS Sales will provide you with system specification document so that you can start assessing your Gap.
	Kick-Off	A session for introductions and to align expectations around project delivery. The discussion will centre around the steps outlined in this document.
	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.

2. Homework

2.1. Onboarding

At this stage we will establish a contractual relationship and handle the administrative activities needed for vendor signup and invoicing.

We recommend a contract for any project of a value greater than \$30,000 AUD.

This stage will substantially occur before the start of the project, coordinated by your Project Manager, the EBMS General Manager and EBMS Project Manager.

2.1.1. Client Project Manager Onboarding Checklist

As the client Project Manager, it is recommended that you:

- Read and understand the proposal.
- Read and understand **Field Guide B1 - BRIDGE - Project Introduction** and this document.
- Co-author a draft Project Charter with your counterpart (the EBMS Project Manager) – making sure that your Sponsor is satisfied with everything.
- Establish with your counterpart any risks for the project.
- Establish with your counterpart any documentation or reporting requirements that have not been laid out in the proposal or EBMS documentation (note that additional effort will bring additional cost).
- Assign (or have assigned) personnel to the key positions in the project (Project Manager, Subject Matter Experts, Key Users).

It is mandatory that you:

- Ensure there is a signed contract with EBMS (or signed proposal for a low value project).
- Provide EBMS with a Purchase Order number and any vendor sign-up forms required by your organisation.
- Establish a payment schedule commensurate with the anticipated cost and effort to EBMS across the length of the project.
- Co-author the Project Charter Document with your EBMS Project Manager.
- Provide the necessary inputs so that your EBMS Project Manager can draft a Project Plan.
- Ensure that your IT Department is briefed about this project especially if there is integration or special hosting requirements as part of this delivery.

2.1.2. Initial Planning

At this stage we will build an initial Project Plan. This is a 'DRAFT' only and will be finalised on approval of the Statement of Work document. Until this time, we will endeavour to keep it accurate and to meet your time constraints.

Delays during the lifecycle of a project can occur, delays may be at the request of EBMS but more frequently are at the client's request. **Any delay will affect the project timeline and will probably affect the expected solution delivery date.** The periods of EBMS activity generally cannot be shortened as we try to deliver quickly and only allow the time that we actually need. Remember that our staff members are often booked to work with more than one client, so unexpected delays may cause longer delays as we need to rebook resources.

You will find that some activities often take longer than expected, especially time needed to gather and confirm requirements on the client side and the time taken to review and provide feedback. If there are delays caused by the client affecting the progress of the project, EBMS will invoice for work already completed.

An updated project plan will be provided in the event of a delay. We will always seek to be transparent and upfront regarding the impact of delays on the project plan. We will always do our utmost to achieve the best result for you.

As the client Project Manager, you will need to -

- Book in your team members and inform them of project timelines and what is expected of them.
- Share scheduled leave if relevant.

2.1.3. Initial Homework

Once we've received a signed proposal or contract, EBMS will prepare and provide the following resources which will assist with your analysis and review of how your process requirements will fit our Core solution:

- EBMS Technical documents
 - System Specification
 - User Manual

It is optional, but we highly recommend that you provide us with a data extract which we can import to your branded solution which we will be preparing for you in the meantime. Experience has taught us that your team will be orientated to the solution more quickly if they can see data in the system which they will recognise. This will greatly help us to provide you with a solution that will meet the expectations of your team during the initial orientation meeting.

2.1.4. Kick-Off Meeting

This meeting will be the first of many meetings between EBMS and your Project Team. Where we can, we like to make our clients our friends. In this meeting we will keep things light-hearted to build a positive and optimistic atmosphere from the start.

The main objective will be to ensure everyone understands and buys-in to the delivery methodology.

Remember that the scope of the project is already agreed at this point, so it is important that the client Project Manager and EBMS refrain from any input during the meeting which has the potential to change the agreed scope. Allowing free-form discussion on 'what we could do' can lead to false expectations, cost blowouts and disappointment.

As the client Project Manager, you should:

- Confirm dates for this meeting with your EBMS Project Manager
- Book your team members and Project Sponsor into this meeting
- Provide the list of attendees to your EBMS Project Manager
- Arrange a venue with internet access and a screen/projector
- Co-author an Agenda for this meeting with the EBMS Project Manager and distribute it to all attendees

On the day of the event, we will:

- Take you through our kick-off slides and explain the process
- Walk through the initial proposal and scope
- Clarify the initial requirements as needed
- Cover any other topics agreed in the agenda

Please take the kick-off slides to heart, as they reflect some hard-learned lessons.

Following the meeting:

- EBMS will provide you with an email address to include in all communications. This will ensure that all EBMS project team members are advised.
- Collaboratively, we will finalise the Project Charter and submit it for approval.
- We will discuss the handover of the 'vanilla' Core solution to your team and will book a date to conduct the orientation and handover meeting.

2.1.5. Introduce us to your IT Department

At this stage we should have a good understanding of what infrastructure and integration support is required. This will be a good time to introduce EBMS to your IT Department. This will help us to correctly synchronise actions and to ensure we comply with your IT Department's policies and procedures.

We will organise a meeting between the following to discuss and plan:

- EBMS Technical Lead
- EBMS Integration Engineer
- Client Project Manager
- Client IT Representative

Please make sure you have any information relevant to this planning shared amongst the attendees before the meeting, as this can be a huge time saver.

Please refer to **Field Guide I1 – Infrastructure and Integration** for more information

2.2. Orientation

The purpose of this step is to conduct a system demonstration so that all members of your team are orientated on how the 'vanilla' Core solution works and is navigated.

It is important to correctly brief your team members on the status of the 'vanilla' solution and the purpose of this phase so that they understand that this is not the final product, and if there are concerns over missing inputs or reports that this can be delivered through feedback.

It is essential that all your team members attend this meeting in order for them to provide you with the desired contributions on desired changes to the solution.

In the meantime, EBMS will be working hard to prep the solution as needed and to import the data extract that you've provided.

Your EBMS Project Manager will keep you updated regarding our progress and will schedule the system orientation meeting for when EBMS is ready.

During this meeting, EBMS will:

- Demonstrate the Core solution
- Answer any questions
- Provide a clear brief on how EBMS expects to receive your feedback

2.3. Checkpoint Meeting



Later in the documentation, we will not copy this content, but you will instead see this icon.

Please refer here for the checklist.

Goals of the meeting:

- Clarify your and our expectations
- Address any concerns you might have

With the above in mind, please consider the following questions prior to your Checkpoint meeting:

- Are project activities clear and unambiguous so far?
- Will all levels of stakeholders understand what you, your team and EBMS have completed?
- Have relevant users and stakeholders contributed to this stage?
- Is your team functioning effectively?
- Is the EBMS team functioning effectively?
- How does your Sponsor view the progress thus far?
- Are the commitments made and contained in the Project Charter document being actioned?
- Is the delivery up to this point still reflecting the Project Purpose and Vision?
- Are you and EBMS still on track to achieve the Project Objectives?
- Are the risks and issues raised so far being addressed effectively?
- What are the additional risks that have arisen and what risks have fallen away?

Your Account Manager looks forward to discussing your answers to the above questions.

2.4. Statement of Work Management

2.4.1. Explore changes with your users

Your next step will be to review the solution with your team and to document your proposed and required changes.

EBMS will provide you with a change list template which you will use to document your required changes as you review the system.

We suggest the following action points:

- Ask each individual in your team to review and play with the solution on their own.
 - They should make individual notes on what should be changed or added to the solution.
 - They should also prioritise their suggestions in two buckets, i.e. (1) 'Need to Have' and (2) 'Nice to Have'.
- Organise a combined meeting during which you can discuss the proposed changes and additions.
 - Ensure you drill down into the 'reason why' because this will be helpful information for our technical team when they process the changes.
 - Use the change list template to define and document the proposed changes.
 - Discuss and indicate the priority of the changes or additions you would like EBMS to make.
 - Where needed, please use screenprints to best explain the changes.
 - Finalise the change list and send it to your EBMS Project Manager.

2.4.2. Scope Creep

Note that **some of your project team members will start to understand the extent of the possibilities that Nimblex offers**. Experience has shown that this can turn into new ideas, changes and process flow extensions. These new ideas can have an impact on the Project Scope.

Changes or additions outside of the Nimblex Core specification document will be assessed by EBMS and may incur additional costs over and above the original proposal.

We are happy to discuss any additions or changes subject to them being aligned with our proposal and the number of hours we quoted for configuration.

We might suggest that certain changes or additions be included in a separate follow-up project if they exceed the hours quoted in our original proposal.

Scope creep is very closely monitored by us as it has cost implications for both the client and EBMS. Unexpected additions and/or changes during the configuration stage will require additional time for EBMS to implement and this extra time will be costed accordingly to the client.

2.4.3. Turning BRIDGE into SIMPLE

However, if you find during your Team's review meeting that there is a strong requirement for large changes to the Nimblex Core solution, and you have additional budget available, then EBMS will provide a Business Analyst to assist with the documentation of your requirements. The project will also be moved across to our SIMPLE Methodology which is more geared towards custom solution implementations. Note that this would need to be supplemented with budget to allow for the change in methodology.

2.4.4. Statement of Work

Once you have approved the Statement of Work, EBMS will commence the solution configuration. The changes defined in this document will be governed by a Change Management Process. This process is explained in **BRIDGE – System Tailoring (Stage 2)** which focuses on the configuration and creation of your solution.

EBMS will keep the Statement of Work updated during the tailoring phase of your solution. This will ensure that the document accurately reflects the specifications of your solution by the end of this project. This will help us to manage your Warranty issues, Statement of Works and Support post implementation.

2.5. User Acceptance Testing (UAT)

Generally, EBMS will not be heavily involved in planning the client component of testing. We recommend you take the time now to plan out test cases against the Statement of Work.

Remember that EBMS is building against the Statement of Work, so it's important that your test cases are linked back to that document, as the document reference will be required if a bug report is being lodged.

3. Read More

The next guide in this sequence is B2 BRIDGE – Gap Analysis (Stage 1).

Document	Title	Content
B3	BRIDGE – System Tailoring (Stage 2)	Explains the configuration of your system.
B4	BRIDGE – Go Live (Stage 3)	Explains UAT, Training and Release to Production.



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