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1. Brief EBMS

Following on from the previous stage, your team has provided their feedback using the Feedback Template.

- This document has been provided to EBMS.
- EBMS has reviewed the proposed changes and additions as defined in the document.
- Any questions or clarifications needed relating to the requested changes have been discussed and dealt with.

2. Steps

2.1. Project Planning

At this time, the client's Business Analyst and EBMS Project Manager will update the project plan. We now have much greater clarity on exactly how much configuration is needed so that we can bridge the gap between current Nimblex Core functionality and your requirements.

Collaboratively, you as the client and EBMS as the vendor will need to define:

1. What are the priorities for the list of changes, while considering your budget and timeframes?
2. What testing will need to occur, when, and by whom?
3. What timeline constraints exist?
4. What new risks and issues have come to light?

It is crucial to book in your IT, Infrastructure, and Integration support resources at this point as these tasks often require a long lead time.

All the above information will be processed by the EBMS Project Team. Once EBMS is comfortable that we fully understand the requested changes, priorities, IT requirements and risks, we will turn your Change List into our EBMS' Statement of Work document.

2.2. Iteration Planning

The system will be implemented in a few iterations as advised by EBMS, typically it will be one round for major changes, and a second round for minor changes and bug fixes relating to the first round.

Each iteration will be processed using the following approach.



The 'build' (i.e. configuration) step in the above diagram will be done using the Nimblex Configuration and Admin controls to ensure the necessary adjustments are made to best fit your requirements.

If required, and subject to approval, additional iterations may be added.

The final/last iteration will not include any new changes without special approval. We will need the last iteration to make any final corrections.

2.3. Iteration (1 to 2)

2.3.1. Plan

EBMS will review the requirements to configure the first iteration or review the results of the previous iteration (if any). The EBMS Technical Lead will raise any possible timeline concerns at this point if there are any issues. This will be escalated to your EBMS Project Manager who will update you if there are any unforeseen delays.

2.3.2. Build

The EBMS Technical Lead and any further Technical resources will proceed to configure the parts of the solution agreed for the current iteration. The person working on each individual task will also test the deliverable for that task. You may receive questions during this step, as we discover ambiguities or missing information in our Statement of Work, or we may need your input on what the best user experience will be for a certain workflow.

The Technical Lead will update the Statement of Work. This is essentially a guide to 'what has been done' and 'how should you try it out'. It is not a full user manual but should be 'just enough' to let you review the new parts of the system.

2.3.3. Test

The EBMS Technical Lead and Project Manager will test the deliverables from the iteration against the Statement of Work, and then hand over to your team for more intensive, transactional and functional testing.

2.3.4. Review

2.3.4.1. Handover Meeting

The EBMS Project Manager will book a time with you to hand over the system. This will be your first opportunity to review the additions and changes that have been completed. Typically, this will be an in-person or screen sharing meeting where the technical lead will talk you through the system in the same order as the Statement of Work.

2.3.4.2. Your 'Work in Progress' Review

We strongly recommend that you select a core group of people for a review at the end of each iteration. This way, you are not going to the broader business but are restricting the collation of feedback to just the core project team, which allows for easier and more effective control of testing and feedback.

It is extremely important to include your subject matter experts to ensure that our understanding of your requested changes to your Nimblex Core Solution were correct and that nothing has been missed. It is also vital to include representatives of impacted areas. If they are not involved early on, you may find these stakeholders resistant to the changes that will have significant impact on their business areas at a later stage.

2.3.4.3. Collating Feedback

Provide your organisations consolidated feedback via email and depending on the complexity and amount of feedback we may require a clarification session to walk through the items. If it is the last iteration, then we accept only feedback relating to bugs.

It is essential that you provide us with consolidated and agreed feedback from your users. If not, then it will lead to rework, added costs and delays.

2.3.5. Feedback Assessment after 1st Iteration

Once we have received your feedback, we will assess it.

Items that are defined as bugs will be scheduled to be fixed before the final iteration.

Other items may be included subject to the budget constraints of the project and the time taken to implement them. We will generally try to give you high-value, low-cost changes to the extent possible while staying within the budget.

The word 'change' will come up a lot at this stage. Please bear with us in our usage, as when EBMS uses the word 'change', we mean that either a requirement must change or a design must change. We do not necessarily mean that 'this is out of scope and will cost you additional money' - it is merely a marker for tasks that were not planned for and may need to be further considered.

Please refer to Section 3. **Feedback Assessment** for details.

If you are keen for EBMS to implement feedback items that cannot be completed in the current scope and budget, we can draft you a Change Request document with costings for budget approval. Once approved, these will be incorporated into an updated project plan.

As the project scope is defined at the start to be able to provide an accurate estimate of costs and timelines, meaning that under many circumstances, additional alterations or changes will impact in Budget and Timeline.

Please come and talk to us if something assessed as out of scope is of particular importance, and we will work with you to determine an appropriate solution.

2.3.6. Repeat

On rare occasions with a Nimblex Core implementation, we may have a second iteration before the last iteration. The same process will be followed for this second iteration, except for the last (referred to as the final iteration) which is dedicated to 'cleaning up'.

(Mandatory for Iteration 1) Now would be a good time for an Account Manager Checkpoint (Refer back to Field Guide S2 – SIMPLE Requirements (Stage 1) –Account Manager Checkpoint for the procedure). Your EBMS Project Manager will organise this for you.



3. Feedback Assessment

When assessing an item against scope, there are several factors to weigh up. This section defines the process that we will use to evaluate any feedback provided to EBMS during the implementation of your project.

At a high level, there are four categories:

Scope Category	Nature of Request	Meaning
In Scope	Bug	These items are explicitly defined in the Statement of Works.
	Not Yet Implemented	There is further detail on assessing scope later in this document.
Out of Scope	Out of Scope	These are items that would result in increasing the scope significantly. This could include a whole new process or significant changes to the structure of the system. This would also apply to items which might increase maintenance or licensing costs.
Discretionary – Negotiable (subject to fit into the existing budget, or if required, seeking further budget)	Change of Requirement	Projects are typically priced without a detailed Requirements Specification having been produced. After we have signed off a Statement of Work, we will have a much clearer understanding of how much discretionary budget there is available in the project after allowing for the 'In Scope' (Must Have) items.
	New Requirement	Generally: we will deliver the 'In Scope' items first, and only limited minor discretionary items, so that we can remove as much budget uncertainty as possible before looking at the rest of the 'Nice to Have' items. After this, there is some scope for including discretionary feedback should there be budget remaining.
	Design Change / Refinement	
No Action Required	Information Only	Examples could be: suggestions, questions or clarifications. Generally, there is no contention here as primarily included for communication and not asking for action.

Remember, that unless EBMS has made an **unreasonable error**: the budget for the project must cover every action by staff performed in delivery of a project, including analysis, planning, design, implementation, testing, documentation, fixing bugs, and reasonable rework.

3.1. Good Reasons to call something “In Scope.”

When assessing for ‘In Scope’ there is often some debate about definitions. Requirements Specification documents and Contracts, no matter how detailed, will usually not include every little thing that the client wants. This framework can be used to reasonably assess (when there is doubt) whether an item is ‘In Scope’ or ‘Not in Scope.’

Weight	Description	Rationale
Very High	Item is explicitly defined as a deliverable in the Statement of Work, or Contract.	These items will be delivered unless there are extraordinary circumstances, e.g. an incompatibility with an associated system which was not able to be identified prior to testing.
High	Item was demonstrated to the client in the context of the <u>specific</u> solution that was being sold to them. (Some demonstrations do show multiple options, in which case this would not apply.)	These items will be delivered where possible.
High	EBMS previously agreed to deliver the item in writing with a clear indication that it would be at zero cost.	These items will be delivered unless mutually agreed otherwise.

3.2. Acceptable Reasons to call something “In Scope.”

The below reasons have been given before as reasons that something is ‘In Scope’ – as these are not related to a commitment we have made, these reasons will probably not be strongly considered.

Rather than debating whether an item should be considered ‘In Scope’, please consider using the ‘Discretionary’ category instead.

Weight	Description	Rationale
Low	The current design doesn’t make sense.	<p>The design of a system is based on EBMS trying to build a system to meet your requirements.</p> <div style="border: 1px solid orange; padding: 5px;"> <p>If the requirements are incorrect, then this will flow into the design of the system – for which EBMS cannot take financial responsibility. There is ample opportunity to review your requirements before we start building and using up the build budget.</p> </div> <p>On the other hand: <u>sometimes we do something dumb and we will fix it.</u></p>
Low	This item is implied by another requirement.	Generally, this is not a good reason to assume that a task or requirement is ‘In Scope’. If it were obvious, it would be written in the requirement specifications.
Low	Without this item, the system will be hard to use.	EBMS will try to deliver a system that is usable to the client, but we do operate under budget constraints and cannot indefinitely implement improvements.
Very Low	This item has been previously mentioned, or sent in an email, or was in a document that we were provided.	The mention of a business need does not constitute an agreement to do a task, or that it is ‘In Scope’.
Very Low	“I assumed that this would be included”; “This is common sense.”	EBMS spends a lot of time and effort putting together documentation with the client so that we know what they expect and what they do not. If you are not sure you must ask, never assume.

4. Change Requests

Throughout the life of a project, it is not unusual to identify gaps in the original requirements or to see opportunities to improve workflow or functionality – resulting in a potential change to the system and hence a shift in the scope of the project.

Any change to scope will have implications, usually about the effort required to implement that change, the subsequent effects on the time required, and the cost of the engineers who will make those changes. *NB that there will also likely be internal costs and resourcing impacts that you should consider in your internal departments' planning and budgeting!

These potential changes must be analysed and actioned in a planned and considered manner, and the process will start by formally documenting the details of the change.

Your EBMS Project Manager will provide you with a template where you will document the change (or changes) required. Upon receipt of the completed template, EBMS will undergo a process of analysis, consider implications on other data, functionality, effort required and associated cost. It is likely you will be asked to clarify parts of the request to ensure a thorough understanding of the requirements. Note that time spent analysing the request will be charged against the project, so be concise and accurate.

EBMS will provide their analysis, which will include any identified risks or issues for undertaking the change and will include details of any anticipated change to your project timeline and additional costs (if applicable). This will be documented in a Change Request form.

Upon acceptance of the Change Request, your EBMS Project manager will schedule the work required and update affected documentation (e.g. Project Schedule, Budget)

5. Read More

The next guide in this sequence is B4 - BRIDGE – Go Live (Stage 3).

Document	Title	Content
B4	BRIDGE – Go Live (Stage 3)	Explains UAT, Training and Release to Production.



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