

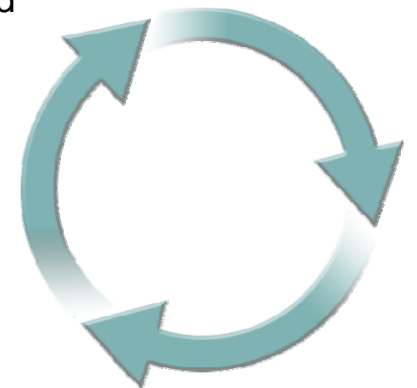


Ranzal Implementation Approach



Project Methodology

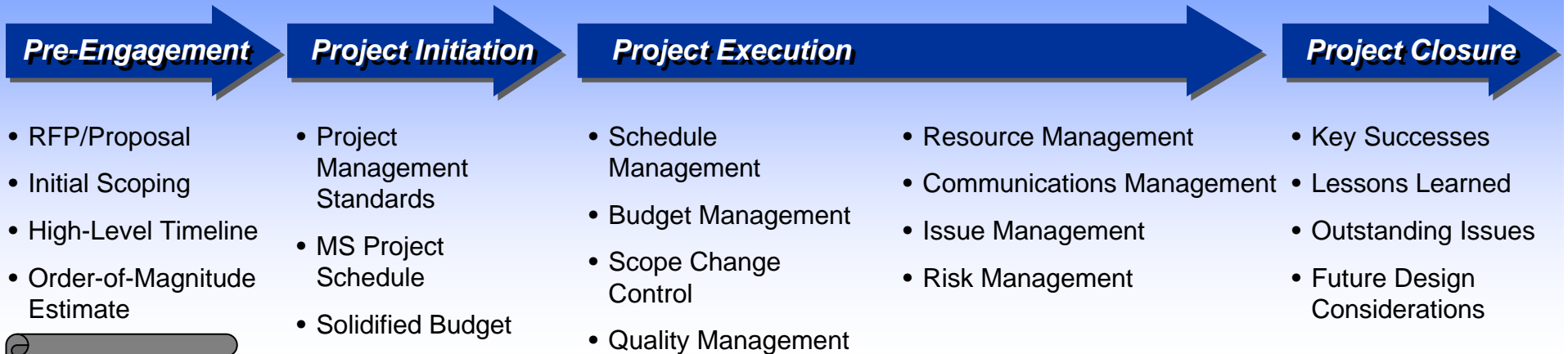
- Comprehensive methodology for defining, developing and implementing Solutions.
- Consistent and Repeatable Process that insures each implementation meets or exceeds business requirements
- Organized, Phase-by-Phase approach with clearly defined purpose and associated deliverables
- Well-timed management and integration checkpoints
 - › Conducting weekly status meetings with project team members to ensure deliverables are being achieved and actions items are communicated and addressed in a timely manner
- Ranzal & Client Partnership – working together to develop the required solution.





Ranzal Project Lifecycle Overview

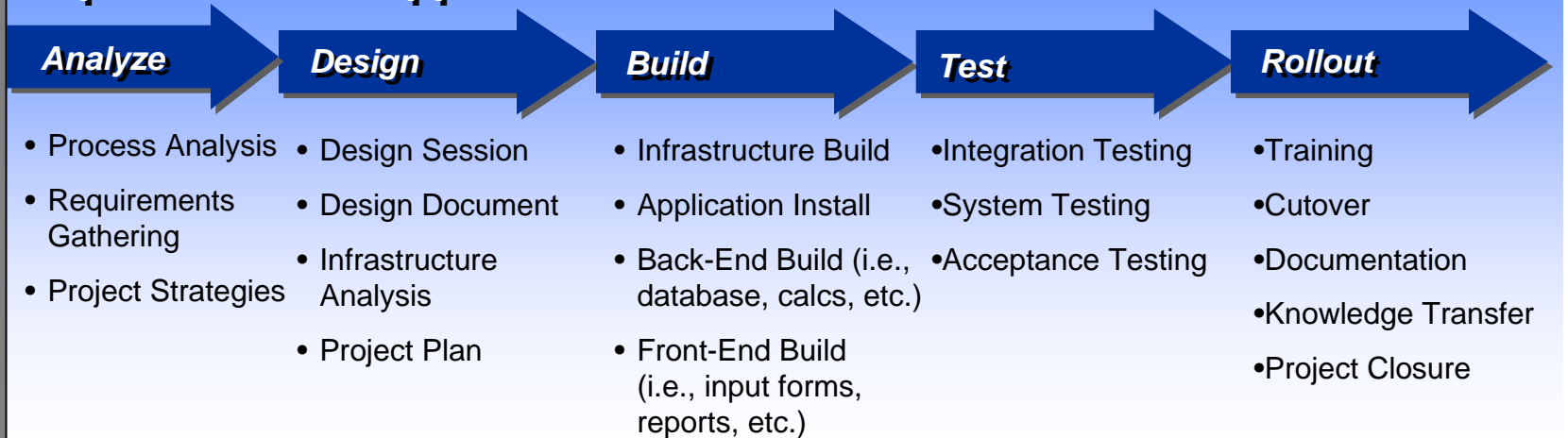
Project Planning & Management Approach



Points of Focus:

- Knowledge Transfer
- Understand Priorities
- Flexible Approach
- Modular Scope
- Leverage Prior Work

Implementation Approach





Lifecycle – Project Planning & Management Details

- I. **Pre-Engagement:**
RFP/RFQ, proposal, contracts/non-disclosure agreements, initial scoping, estimated timeline and an order of magnitude estimate for the project.
- II. **Project Initiation:**
This phase details all the things that happen at the beginning of any project. The budget is solidified for the agreed project scope. Project management tools are utilized.
- III. **Project Execution:**
This is the largest phase as many iterative tasks are occurring – resource schedule, budget tracking managing any client requests for scope changes (and the ramifications), tracking issues and their resolution, as well as managing other project risks.
- IV. **Project Closure:**
Project analysis entails: the key successes of the project, lessons learned, managing any outstanding issues, and considers future design changes or maintenance issues. Moreover, this phase is reviews these results with the project sponsors so that they know that the business problem was resolved and the benefits realized from the solution.



Lifecycle – Implementation Details

I. **Analyze / Design:**

- This phase details the scope and requirements of the project. Define “as-is” and “to-be” business processes.
- At the end of the discovery session, a mutual understanding of end-user reporting requirements, inputs, calculation rules, and data sourcing will be documented in a Design Document.
- An infrastructure analysis is also conducted. From the Design Document, a Project Plan and Budget will be developed, defining all tasks, responsibilities, milestones and costs.

II. **Build:**

- The phase is made up of the infrastructure build, application install, back-end build (i.e., database components) and the front-end build (i.e., reports and input forms).
- This phase defines details such as the operating system environment, programming languages, front-end products, etc.
- By using best practices, the application will be developed with all the data and structure required.
- Some development techniques include: definition and ordering of the database dimensions to minimize storage and processing, definitions of dimension hierarchies to ensure that end-user access and drill-down are intuitive, definition of calculations and how they occur, and definition of a single vs. multiple model strategy in order to minimize long-term maintenance, among other techniques.



Lifecycle – Implementation Details

III. **Test:**

- We do integration testing, system testing and acceptance testing.
- For instance, data sources, data loading, calculations, user inputs, scripting, and reports all must be tested and verified for accuracy and efficiency.
- End-user involvement in this phase is important, as it serves to achieve several implementation goals – data validation, user buy-in of application design, and knowledge transfer.

IV. **Rollout:**

- This phase end-user training and documentation are included in this phase, as is technical documentation for the application administrator.
- Our consultants utilize techniques to facilitate a knowledge transfer of the technologies and applications to the client's staff, allowing them to end the project being self-sufficient.
- This way, the client's staff will be able to maintain the application, and provide necessary enhancements.
- In addition, our consultants are skilled trainers, and possess the ability to develop and present end user training based on the application that has been developed and delivered to the end users.



Lifecycle Details – Methodology Points of Focus

■ Communication

- › Communication is key. We suggest periodic status meetings to demonstrate progress and discuss issues and concerns.
- › This also encourages client participation which is a key project success factor.
- › It also helps us to understand the project priorities and overall expectations.
- › Experience has shown us that as a users' knowledge of an application increases, so do ideas for enhancements to system design.
- › Communication needs to be open so users can understand the ramifications of design changes on the overall project timelines and costs.

■ Knowledge Transfer

- › We provide knowledge transfer from Ranzal to the client, both end users and technical developers.
- › Our goal is to allow our clients to become self-sufficient, to handle on-going maintenance and enhancements at a minimal cost.
- › We offer deliverables that include the design documents and system administration documentation.
- › We can also provide end-user training classes as requested.

Points of Focus:

- Knowledge Transfer
- Understand Priorities
- Flexible Approach
- Modular Scope
- Leverage Prior Work



Lifecycle Details – Methodology Points of Focus

- **Flexible Approach**
 - › This means that we take into account your particular needs and resources.
 - › We partner with the client and with a combined team we build the solution together.

- **Modular Scope**
 - › We break down the tasks in order to increase understanding and make the development and maintenance of the system easier.
 - › Ranzal believes that iterative prototype work is crucial to project success and is the basis of the production system, not a throwaway effort. To this end, we also advise a verified development environment, allowing on-going testing by the user community.

- **Leverage Prior Work**
 - › We leverage prior work to bring the best practices for application development.
 - › We can make recommendations supported by numerous implementations that are in the client's industry based on a thorough understanding of business processes.
 - › Every technical consultant uses a variety of powerful, industry-leading business intelligence and OLAP tools to develop innovative solutions that empower our customers to get more value from their business information.
 - › Moreover, we bring in the right skills for the right task.

Points of Focus:

- Knowledge Transfer
- Understand Priorities
- Flexible Approach
- Modular Scope
- Leverage Prior Work



Project Expectations

- **Communication**
 - › In-Person / Email / Phone
 - › MS Live Meeting
 - › Team Contact List
 - › Issue Resolution - Any areas of concern with the project should be addressed with the TM and BDM
- **Project Planning & Tracking**
 - › Status Reports
 - › Resources & Timeline
 - › Project Tracking hrs/\$ (Act/Budget)
- **Skill Set**
 - › We bring the right skills for the right tasks
- **Knowledge Transfer**
 - › Knowledge Transfer Meetings
 - › System Admin Documentation
 - › Training (Admin / Users)
- **Access & Logistics to be Setup**
 - › Login ID / PW
 - › VPN (as needed)
 - › Mappings
 - › Desk / Computer / Phone



Critical Success Factors

- Involve stakeholders early in the project.
- Determine priorities for the project scope, timeline and cost.
- Designate contacts for each core process, and technical roles as appropriate.
- Obtain timely input, feedback and sign-offs for the application design, development and testing.
- Manage to a detailed project plan with milestones and prepare weekly status reports.
- Limit and control scope changes through a defined process. Use Phase 2 to postpone less critical requirements.
- Identify future System Administrators before the project begins.
- Provide basic training for the System Administrators early in the project.
- Involve System Administrators in all Design meetings and decisions.
- Delegate certain development tasks to the System Administrators to advance understanding and encourage ownership.
- Maintain a knowledge transfer log/agenda throughout the project.
- Understand that shortening development timelines will have a negative impact on knowledge transfer.



Project Documents

- Project Plan
- Design Document
- Project Estimate
- Project Timeline
- Status Reports
- Scope Change Requests
- Process Flows



Project Plan Sample

Microsoft Project - Hyperion Implementation Project Plan 7.mpp

File Edit View Insert Format Tools Project Collaborate Window Help

Tasks Resources Track Report

Client Phase 1

	% Compl	Task Name	Duration	Start	Finish
1	26%	Client Phase 1	182 days?	Mon 1/29/07	Wed 10/10/07
2	100%	Select Implementation Vendor	12 days	Mon 1/29/07	Tue 2/13/07
8	36%	Pre-Build Activities	56 days	Fri 4/6/07	Fri 6/22/07
23	56%	Analyze/Design	113 days	Tue 3/27/07	Fri 8/31/07
24	70%	Requirements/Design Session	90 days	Tue 3/27/07	Tue 7/31/07
25	50%	Design Document	108 days	Tue 4/3/07	Fri 8/31/07
26	0%	Sign-off Design Document	15 days	Mon 7/16/07	Fri 8/3/07
27	100%	Develop Project Plan/Revised Estimate	6 days	Mon 4/16/07	Mon 4/23/07
28	22%	Build	112 days	Thu 4/12/07	Mon 9/17/07
29	99%	Prototypes	28 days	Thu 4/12/07	Mon 5/21/07
33	18%	Back-End Build	90 days	Fri 5/11/07	Fri 9/14/07
34	65%	Capital Planning Application	37 days	Wed 5/23/07	Fri 7/13/07
35	0%	Stretch Plan Application	62 days	Wed 5/23/07	Fri 8/17/07
36	28%	OPS Application	62 days	Wed 5/23/07	Fri 8/17/07
37	0%	Data Source Preparation	58 days	Tue 6/12/07	Fri 8/31/07
40	50%	SQL / Build Database Structure	4 days	Tue 5/22/07	Tue 9/4/07
41	40%	HAL Development	77 days	Wed 5/23/07	Fri 9/7/07
42	50%	Load Data	80 days	Fri 5/11/07	Fri 8/31/07
44	0%	Data Validation	45 days	Fri 6/15/07	Fri 8/17/07
45	4%	Develop Capital Database Calculations	37 days	Wed 5/23/07	Fri 7/13/07
46	0%	Develop Ops Database Calculations	62 days	Wed 5/23/07	Fri 8/17/07
47	0%	Validate, Tune & Optimize Capital DB	19 days	Mon 6/18/07	Fri 7/13/07
48	0%	Validate, Tune & Optimize Ops DB	54 days	Mon 6/18/07	Fri 8/31/07
49	0%	Data Extracts (Capital Budget # Generator)	14 days	Mon 6/18/07	Fri 7/6/07
50	0%	Implement Backup Procedures	5 days	Mon 7/16/07	Fri 7/20/07
51	0%	Implement Automation	10 days	Mon 9/3/07	Fri 9/14/07
52	3%	Security	58 days	Tue 6/12/07	Fri 8/31/07
58	19%	Front-End Build	81 days	Fri 5/25/07	Mon 9/17/07
66	0%	Test	55 days?	Fri 6/15/07	Fri 8/31/07



Design Document Sample



DW & Hyperion Reporting App Design

Design Document

Client Name

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Project Estimate Sample



Client Name
Date

Hyperion Planning Implementation

	INFRASTR. SPECIALIST	CONSULTANT	PROJECT LEAD	BUS. AN/PM	TECHNICAL MANAGER	TOTAL
Installation						
QA Environment	5				1	6
Production Environment	5				1	6
Development Environment	5				1	6
Design & Assessment						
Design, Document and Estimate		1	3	1	1	6
Proof of Concept		5	5		2	12
Development						
Capital Application						
Build Database Structures		10	10		3	23
Data Load/Validation		3	7		0.5	10.5
Database Calculation/Member Formulas		5	10		0.5	15.5
Development of Planning based web forms		3	5			8
Automation		5	2		1	8
Budgeting/Forecasting Application (O PQ)						
Build Database Structures		2	5			7
Data Load/Validation		5	5		0.5	10.5
Database Calculation/Member Formulas		2	10		1	13
Develop Stretch Plan		10	2			12
Develop Long Range Plan		10	2			12
Development of Planning based web forms		5	10			15
Automation		10	2		6	18
Implement Back End Security		3	1			4
Workflow Process Management (Approval Process)		1	1			2
System Automation		3	1		0.5	4.5
Reporting						
BI Reporting/Web Analysis		5	5			10
System Testing						
System Testing/UAT		1	2	1	1	5
Training and Documentation						
System Documentation		5	2			7
Admin Knowledge Transfer		2	3			5
Implementation Support						
Status Report/Project Management		2	2	10	20	34
Contingency			10	4	5	19
DAYS	15,000	58,000	105,000	16,000	45,000	279,000
RATE/HR	\$ 200.00	\$ 150.00	\$ 200.00	\$ 150.00	\$ 225.00	
DAILY	\$ 1,800	\$ 1,350	\$ 1,800	\$ 1,350	\$ 2,025	
	\$ 27,000	\$ 132,300	\$ 189,000	\$ 21,600	\$ 91,125	\$ 661,025



Status Report Samples

- One Page Summary Status Report
- Or a Detailed Multi-page Status Report

Weekly Status Report			Overall Status				
			<CLIENT – PROJECT NAME> Period: <START DATE – FINISH DATE>				
This Week 😊 Last Week 😐							
ANSWERS/DECISIONS NEEDED			UPCOMING TASKS/MILESTONES				
Question	Status	Owner	ID	Task/Milestone Name	Orig. Date	New	Actual
			1				
			2				
			3				
			4				
			5				
THIS WEEK'S SIGNIFICANT ACCOMPLISHMENTS			NEXT WEEK'S KEY ACTIVITIES				
<ul style="list-style-type: none"> • Saksjd,askfj • Asifdjkdsf • Aksfdj • Alakfdj • Alsjfd • Aksjdfj 			<ul style="list-style-type: none"> • aksjdf • Isakjdfj • kalsfd • askdjf • askdf • lasjdf 				
MAJOR ISSUES/RISKS							
ID	Status	Issue/Risk	Plan to Resolve				
1	Closed						
2	Open						
3							
4							

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Status Report Sample.doc

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Weekly Status Report		
	Prepared By: [Name]	Week: XXXXXX – XXXXXX
Client/Project: [Client Name] – [Engagement Name]		

Stoplight Status / Dashboard

Dimension	Last Week	This Week	Notes
Schedule	🔴	🟡	
Budget	🟡	🟢	
Scope	🟢	🟢	
Quality	🟡	🟢	

Significant Accomplishments This Week

- Accomplishment 1
 - Sub-bullet if necessary (use Tab button to indent)
 - Another Sub-bullet if necessary
- Accomplishment 2
- Accomplishment 3

Key Activities/Deliverables for Next Week

- Activity 1
- Activity 2
- Activity 3

Major Issues

ID	Issue Description	Target Res. Date	Owner

Milestone Status

ID	Milestone Name	Orig. Date	New Date	Actual Date

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Ranzal Status Report Template.rtf

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Weekly Status Report		
	Prepared By: [Name]	Week: XXXXXX – XXXXXX
Client/Project: [Client Name] – [Engagement Name]		

Meetings and Locations

Meetings Attended During the Past Week			
Date	Location	Meetings	Purpose

Meetings Planned for the Upcoming Week

Date	Location	Meetings	Purpose

Engagement Administration

	Budget	Actual-to-Date	Actual/Budget	Revised Budget
Hours	5	1	20%	
Cost	\$5	\$0	0%	

Resource Plan for Next Week

Org	Name	M	T	W	Th	F	Comments
	John Doe	O	O	O	O	R	Available via cell
		N	O	O	O	N	
		O	O	N	V	V	

LEGEND: O=Onsite, R=Remote, N=Not-Billing, H=Holiday, V=Vacation


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Ranzal Status Report Template.rtf

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Scope Change Sample

 RANZAL An Edgewater Technology Company	Change Control Request	
	Prepared By:	Date:
Engagement		
Project Name:		
Requestor:		
Prepared by:		
Date:		
1. Requestor Information		
Fill in with appropriate information or place an "X" next to those that apply:		
Area of Change:		
Scope <input type="checkbox"/>	Schedule <input type="checkbox"/>	
Budget <input type="checkbox"/>	Quality <input type="checkbox"/>	
Is this Change the result of a Risk Management Action?		
No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Risk Description:
Proposed Change Description and Justification:		
Description:		
Justification:		
Alternative:		
Priority: (check one) High <input type="checkbox"/> Medium <input checked="" type="checkbox"/> Low <input type="checkbox"/>		
2. Change Control Board Initial Impact Analysis		
Configuration Items Affected (e.g. specifications):		
Impact on Cost:		
Impact on Schedule:		
Impact on Resources:		
Risk associated with implementing the change:		
Risk associated with not implementing the change:		
Final Review Results:		
Review Date:		
3. Change Control Board Final Recommendation		
4. Change Control Board Signature		
Project Name:		



Next Steps for Avon Detailed Requirements Analysis

- Define “as-is” and “to-be” business processes
- Document technical and business requirements
- Develop high-level project strategies
- Conduct an intensive Design Session that will facilitate discussions such as:
 - › Current business processes and supporting systems
 - › Target business processes and supporting systems
 - › Core project objectives and business requirements
 - › Project standards and design principles
 - › Resource planning and logistics coordination
- Deliverables
 - › Design Document confirming requirements and project plan
 - › Comprehensive Project Schedule (using MS Project) providing roadmap for implementation
 - › Project Estimate