



National e-Procurement Project

Delivering e-Procurement

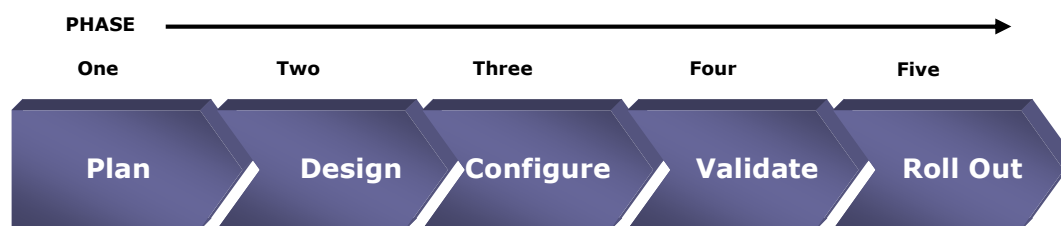
DESKTOP GUIDE TO E-CONTRACT MANAGEMENT SYSTEMS

Implementation Roadmap

Implementing an eCMS is in many ways similar to implementing any e-Procurement system (or indeed, any IT system). It follows the same roadmap as these systems and it is not intended to provide detailed guidance when there are already many sources of this – OGC being the most well known.

However there are specific aspects of an eCMS that demand rigorous and careful planning and close working with the supplier as well as with end-users. This 5-stage roadmap, shown in fig 6 below, is provided to aid planning an eCMS implementation. It has been discussed with several eCMS suppliers, who will typically also be following the same 5-stage stage approach.

Fig 7: Overview of the Implementation Roadmap



The roadmap addresses not only the technical approach to the project, but also the organisational, procedural and data considerations. Depending on the nature and size of the implementation, some elements of this approach may be simplified as appropriate.

eCMS Business Case Template

Implementation Roadmap Phase 1: Plan

The Planning Phase establishes the baseline project standards and procedures. These should be established through a Project Initiation Workshop, and potentially one or two follow-up meetings if required.

Scope and Plan

Run a Project Initiation Workshop to define the basic project brief and scope for the implementation of the Procurement plan. This needs to establish the following:

- Project drivers, objectives and critical success factors
- Scope
- Organisational
- Process
- Technical
- Data
- Project organisation and roles
- Project Approach
- Phases
- Project deliverables and timescales
- Project communication plan
- Online project document repository
- Project meeting format
- Management of scope/change requests and issues

All documentation should be stored in a project library – preferably a secure, on-line project document repository that will be maintained on a weekly basis to communicate the minutes and agendas of project meetings, key project documents and an up-to-date copy of the Change Log. This repository should be made available to all relevant authority project stakeholders and users.

Deliverables from Phase 1

- Project Initiation Document
- Online project document repository
- Detailed project plan

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Implementation Roadmap Phase 2: Design

In Phase 2 the design aspects of the system are established, prior to system configuration.

Design

A series of Design Workshops should be held to confirm the detailed operation of the system:

- System operation
- Confirm system modules and features to be adopted
- Configure data elements: field labels, drop-down values, validation rules, etc.
- Determine any additional functional requirements
- Confirm bespoke reporting requirements
- User/Group profiles
- Establish end user and administrator profiles and field authorisation levels
- Workflow setup
- Templates for tender creation
- Actions (description of tasks involved in managing contracts)
- User guidance text (system and procedural)
- Supplier performance criteria
- Procurement categories
- Data migration (if appropriate)
- Confirm data upload plan for existing suppliers, contracts and procurement categories
- Look and feel
- Appropriate corporate look and feel (logos, colours, etc.)
- Customisation of system explanatory text

Deliverables from Phase 2

- Functional Specification for bespoke customisation
- List of Change Requests for application enhancements

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Implementation Roadmap Phase 3: Configure

Configuration

Having confirmed the design requirements, the system is configured using an Administration and Configuration Tool. This is where the flexibility of the system is brought to bear to adapt it to each authority's requirements. Where customisation is required above and beyond the changes possible through configuration (e.g. bespoke features), a system prototype will need to be configured to the authority's stated requirements – but NB this may add significantly to costs.

Data Migration

On completion of all configuration and customisation a sub-set of live data should be migrated to a QA environment. This will include a sample of contract and supplier details. This exercise serves as a dry-run to anticipate and pre-solve go-live issues.

Testing Preparation

The test plan now needs to be agreed between the authority and supplier, then modified/enhanced as required.

Training Preparation

A Training Course and User Guides should be discussed between the authority and supplier and modified/enhanced as required.

Deliverables from Phase 3

- Configured and customised application
- QA environment
- Test plan
- Training material

Implementation Roadmap Phase 4: Validate

Testing

During Phase 4 a rigorous testing strategy and schedule is used to validate the technical and functional performance of the application. Validation covers all aspects of the system functionality, design, security and robustness.

User acceptance testing needs to be conducted by end-users, supported by the supplier, developers and all test scenarios and results are documented. This is where the authority's 'power-users' need to be trained in the use of the system prior to testing.

Deliverables from Phase 4

- Completed test scripts
- 'Power-user' training
- Training plan for rollout

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Implementation Roadmap Phase 5: Rollout

Rollout

When the system has been tested and validated, it is recommended that it is piloted with a select group of users for a short period of time. The purpose of the pilot is to validate the system performance and functionality in a 'live' but controlled environment prior to rollout.

On completion of Phase 5, the system is ready for roll-out at a pace appropriate to the capabilities of the organisation/s.

Preceding the roll-out, it is recommended that the authority adopts a programme to focus on internal marketing and awareness-raising of the application, its features and benefits.

Any roll-out strategy and plan will need to take account of data upload requirements (ie loading contract and supplier details) and end-user training.

Population of the contract register in particular (and supplier details to a lesser extent) will take significant effort and the experience of all authorities that are implementing e-CMS is that it is the lack of these details that holds back roll-out. A decision is needed as to how gradually to build up this data – it is not realistic just to rely on a natural flow-through of new contracts.

Deliverables from Phase 5

- Roll-out strategy and plan
- 'Go-Live' of the System to end-users (as an initial pilot and subsequently to all user groups)
- Post implementation review and Lessons Learned

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Critical Issue: internal resources

Internal resources will need to be involved in all five phases. It is, of course almost impossible to provide detailed resource requirement figures in a generic implementation model. However the following, based on the experience of suppliers and a number of authorities should prove a good guide for Districts, Boroughs and Unitary Councils. Metropolitans and regional groups of authorities will need to scale up the table to match their individual circumstances.

Typically an implementation project should take between 10 and 16 weeks and authorities should plan to make the following FTEs available from staff in the project team:

Phase	Minimum time	Maximum time	Authority time requirement (FTE)
1. Plan	2 weeks	4 weeks	0.5
2. Design	2 weeks	4 weeks	0.75
3. Configure	3 weeks	4 weeks	0.25
4. Validate	3 weeks	4 weeks	1.0
5. Roll out	subject to size of roll-out	subject to size of roll-out	subject to size of roll-out

These duration estimates are indicative only and may vary depending on the level of bespoke enhancements requested. The minimum and maximum estimates both correspond to approximately 50% of a FTE throughout the duration of the implementation project.

The time requirement for Phase 5 will clearly depend on the size of the pilot and speed of rollout. Hosted systems will require less time than internal ERP solutions to implement as the effort is spent with the users and work flow rather than the system operation.

One area that is not included in the table above is the collation of existing data to populate the contract register. This will need to be done prior to implementation of the new eCMS and will be totally dependent on the current state of the database, if indeed one actually exists (on a recent survey less than 15% of councils actually held a formal Contract Register).

Where there is little data already compiled, it will be critical to the success of the project to allocate resources and embark on the collation exercise. As it requires the co-operation of contract managers across the whole organisation and they are under considerable pressure, this will take a lot longer than it should. **The need to plan for a Contract register ahead of the start of an eCMS implementation cannot be emphasised too often.**