



OHIO
UNIVERSITY

**Ohio University
Student Information System
Phase 2 Project**

*Kickoff Meeting
January 31, 2006*

MORAN TECHNOLOGY
CONSULTING

Agenda

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Introductions – Moran Technology Consulting Team

Charlie Moran

Project Executive

Paul Giebel

Project Manager / Sr. Consultant

Craig Foley (IBM)

Sr. Consultant

Jan Diombala

Sr. Consultant

Kris Nordlie

Sr. Consultant

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Moran Technology Consulting Background

- Moran Technology Consulting (MTC) is an experienced and proven provider of consulting services to the education, public sector and commercial industries
- Our management team has been working together for almost 7 years, with some working together for close to 20 years
- Headquartered in Naperville, IL (outside Chicago)
- We serve clients throughout the entire United States and Canada
- Our consultants have provided services to 50+ different Higher Education clients
- MTC offers a full range of IT and Management Consulting services to our Higher Education clients:

Strategic Planning and Governance

ERP Planning and Implementation

Change Management

Organizational Assessment/Re-Alignment

Business/Technology Continuity Planning

Infrastructure / Security Support

Instructional Technology

Strategic IT Assessment and Planning

Process Re-design / Transformation

Sarbanes-Oxley / IT Controls Planning

Security Assessment and Remediation

Management and Staff Outsourcing

Applications Portfolio Assessment

Sponsored Research Management

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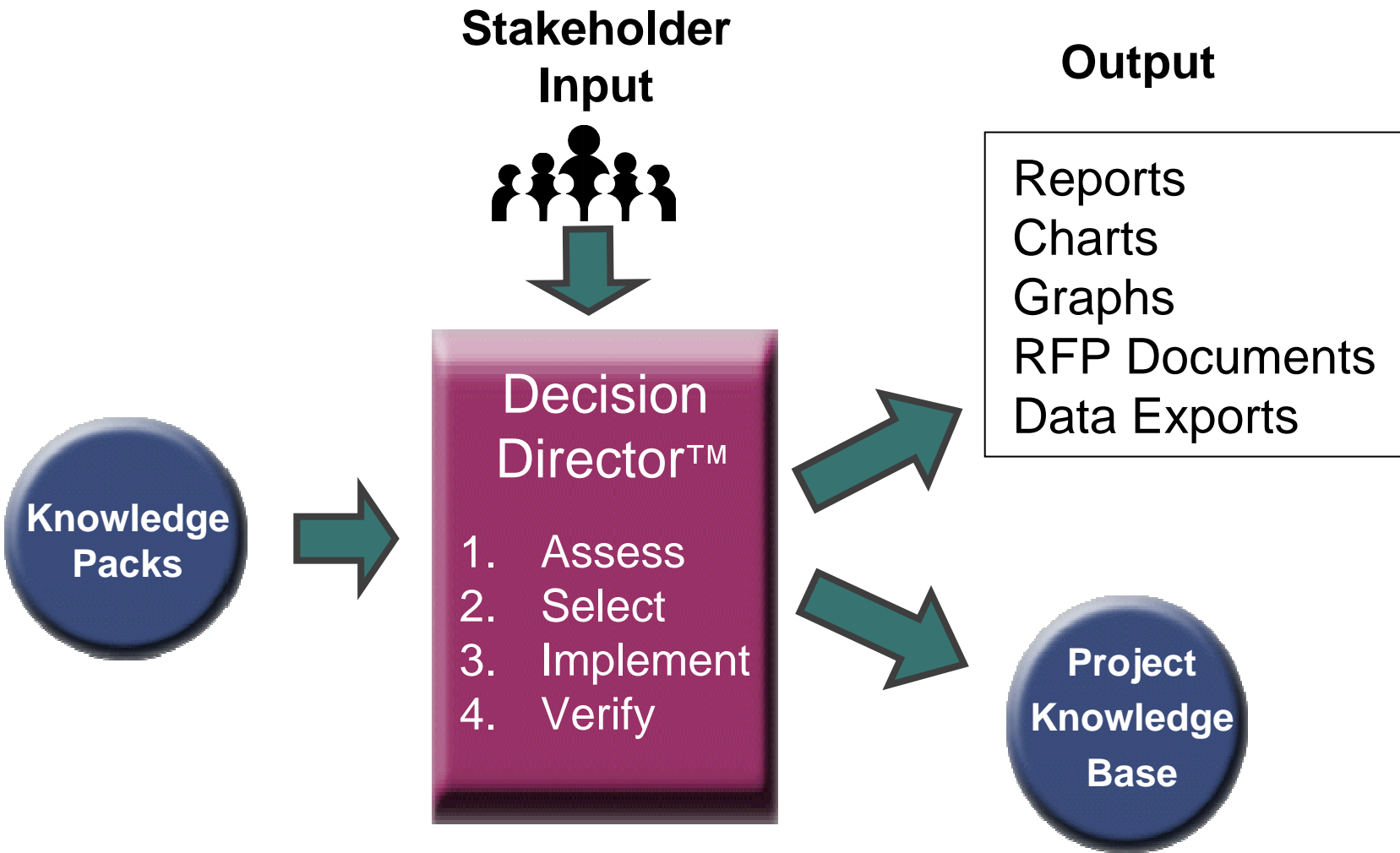
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DecisionDirector Overview



DecisionDirector KnowledgePacks

- Academic (Student)
- Financial Management
- Human Resource Management
- Strategic Drivers & Critical Factors Discussion Guides
- IT Requirements ERP Support
- IT Outsourcing
- Room Scheduling
- Philanthropy/Advancement
- Library Management
- Grants Management
- One Card System
- Fleet Management
- Enterprise Information Portals
- CRM

DecisionDirector Value to Clients

- Build client confidence to decide
- Reduce client project cost
- Ease change management
- Provide project protection
 - Reduce scope creep
 - Manage expectations

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Project Objectives

- Enhance the efficiency and increase the effectiveness of critical business processes associated with student related information services.
- Engage as many stakeholders as possible (250-350) in a highly interactive and collaborative process to identify and validate requirements for a new student information system.
- Utilize the Decision Director tool to create a detail-level RFP for student information software. This RFP must reflect critical functional needs and is aligned with the University's strategic plan (Vision OHIO).
- Utilize the Decision Director tool to collect the data necessary to identify opportunities for optimization of business processes related to financial, human resource and payroll business areas.
- Establish a high degree of buy-in for the student ERP project.
- Ensure an informed, efficient and justifiable student ERP selection decision.
- Manage the overall project processes within the given time frame through effective project and schedule management and progress reporting.

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Critical Success Factors

We believe that it's important to understand the factors that will determine if we have a successful project BEFORE we begin the project....

Individuals may have differ factors that are important to them.

How would YOU answer the following question:

“This project will be considered a success if.....”

Critical Success Factors (Gathered During Meeting)

- Kickoff session participants need to be satisfied with the project's results
- Have a system available where the student/faculty have control over available information
- Need to obtain efficiency in service levels (e.g., when in face-to-face student interaction)
- Students are served better and are not bounced around between departments
- Build clear, concise, and realistic requirements that will be utilized and help to differentiate the university
- Should be able to show improvement in the Key Performance Indicators (KPI's) shortly after implementation
- Should be able to make decisions quicker (e.g., recruitment)

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Project Risks

- Significant Amount of Work in a Tight Timeframe
- Availability of Ohio University Subject Matter Experts
- Responsiveness of Ohio University Subject Matter Experts
- Commitment by OU to stay on schedule
- ??????

Project Risks (Gathered During Meeting)

- Competition for time/resources between this project and VisionOhio while also trying to make budget decisions
- Critical Success Factors are not met
- The university does not have a history of good communication
- DecisionDirector is an unknown tool
- People have to be able to understand / use the system
- Fear that specialty groups (College of Medicine, Lifelong Learning, etc.) will have their needs cut first when looking to balance scope and budget
- How does the move to semesters fit into this project's planning?

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Overall Project Approach

- Step 1: Project Kickoff
- Step 2: Transformation Strategy Development
- Step 3: Vision Focused Requirements Development
- Step 4: Develop RFP for Software Package Selection
- Step 5: Vendor Evaluation Assistance
- Step 6: Oracle Project Review
- Step 7a: Solution Development – Report Writing Tool Strategy
- Step 7b: Solution Development – Data Warehouse Analysis and Strategy
- Step 7c: Solution Development – Portal Strategy

Step 1: Project Kickoff

Objective:

- To establish a clear understanding on the part of the MTC and OU project teams and OU sponsors regarding the objectives and scope of the project and the approach that will be taken

Approach:

- MTC will develop a draft Microsoft project plan for the project
- Conduct a kickoff meeting with the SIS Executive Steering Committee and SIS RFP Team

Deliverables:

- Project plan (in Microsoft Project) with major milestones
- Project team assembled and kickoff meeting held
- Project management processes:
 - Status Reporting and Communication Process
 - Deliverable Approval Process
 - Scope Change Management Process

Step 2: Transformation Strategy Development

Objectives:

- Develop a high-level Transformation Vision for the future delivery of student services
- Develop a set of Transformation Guiding Principles that define major change themes
- Identify the set of high-level change inhibitors that face OU's SIS project and document the high level set of impacts that these inhibitors will have on the project
- Develop a communications plan to engage and get buy-in from the project's stakeholders

Approach:

Transformation Guiding Principles

- Conduct a ½ day executive transformation workshop with the ESC to:
 - ❑ Develop a high level Vision for how student services need to be transformed
 - ❑ Develop a set of Transformation Guiding Principles for this project which will be utilized in the functional transformation workshops
 - ❑ Define high level 'Change Inhibitors' that must be addressed to have a successful SIS project
- Distribute the guiding principles to the appropriate stakeholders

Change Assessment

- Identify and interview select stakeholders of both user and functional departments, focusing on organization structure, organization behavior, and structural and behavioral enablers
- Conduct workshops with select members of the OU community to validate and refine the draft change strategies and responsibilities

Step 2: Transformation Strategy Development (cont'd)

Approach (cont'd):

Communications Plan

- Develop a project communication plan that includes: Communication Goals, Stakeholders Identified & People Responsible, Media Identified & Key Project Events
- Document the final set of inhibitors, their project plan impact and the strategies and communication plans to address them

Technology Preview Conference

- Coordinate 2 Student Information Vendors (Oracle and SCT) to come to the campus to demonstrate the types of functionality available to the OU stakeholders through a new/modern SIS system.
- Document the major functions and themes that appeared to interest OU

Deliverables:

- A document that outlines:
 - Transformation Vision and Guiding Principles
 - Documented Change Inhibitors
 - Documented action and communications plan

Step 3: Vision Focused Requirements Development

Objectives:

- Ensure MTC team has consistent understanding of the impact of the Transformation Vision on OU's current strategy, business practices, organization and culture, and supporting technical/application architecture for the targeted process areas
- Identify opportunities for improvement across processes
- Identify critical business objectives, decisions, and other initiatives that may govern/constrain potential solutions
- Define the RFP functional and technical requirements

Approach:

- Collect and review any existing documentation
- Facilitate Process workshops with the OU and MTC SME's to gain an initial understanding of the core processes that are within scope
- MTC will document the process based on the workshop discussion
- Facilitate workshops with the OU and MTC SME's to review and finalize the documentation of the current state processes and the opportunities for improvement
- Conduct workshops with teams from each target functional area, as well as the technology support group, to finalize the DecisionDirector survey and identify stakeholders who will be asked to respond to the DecisionDirector survey
- Conduct DecisionDirector survey

Step 3: Vision Focused Req. Development (cont'd)

Approach (cont'd):

- MTC will analyze the survey results and create a prioritized set of final requirements for each area
- MTC will conduct a three-hour workshop with the SIS RFP Team (SRT) to review the survey responses and the MTC analysis. This team will refine and finalize the set of RFP requirements during this workshop

Deliverables:

- For each functional area, MTC will produce the following:
 - ❑ Using Microsoft Office tools, documented process flows, descriptions of the current business processes
 - ❑ Documented list of improvement opportunities for each of the business process areas
 - ❑ Final set of RFP requirements

Step 4: Develop RFP for Software Package Selection

Objective:

- Develop an SIS package RFP for OU

Approach:

- MTC and OU will jointly develop the table of contents for the RFP
- Utilizing RFP templates from OU, MTC and Advantiv, MTC will draft an RFP for an SIS system that includes all the functionality that is within scope
- MTC will work closely with the SIS RFP Team who will have responsibility to edit the draft documents and work with MTC to finalize them
- OU Purchasing will be responsible for creating and editing all standard RFP contractual sections of the RFP

Deliverables:

- Final SIS RFP

Step 5: Vendor Evaluation Assistance

Objective:

- Support OU in evaluating the vendor proposed solutions

Approach:

- MTC will work with OU to determine the final set of demonstration scripts that are needed and then help OU develop them

Deliverables:

- Demonstration script support

Step 6: Oracle Project Review

Objective:

- Assist OU in developing a prioritized set of requirements for future projects that might enhance OU's financial and human resources environment

Approach:

- Review the project charters and plans and other documentation of the Oracle implementation to gain an understanding of the original goals of the project and the current state of IT-enabled services in these areas
- Review the Advantiv Knowledge Packs, as well as prior MTC Finance and HR/Payroll projects to define a set of potential new requirements for these systems
- Utilize the DecisionMaker tool to survey an appropriate group of OU stakeholders to determine their view of importance level of each of the potential requirements
- MTC will consolidate the DecisionMaker findings and develop a set of PowerPoint charts to review these quantitative answers
- Conduct workshops/interviews with key OU stakeholders to gain an understanding of the underlying needs that drove the survey findings and to further refine the needs statements and associated prioritization
- Develop a draft set of potential future projects / initiatives to enhance the financial and human resources environments
- Conduct workshops with appropriate OU personnel to review and finalize the draft project recommendations

Deliverables:

- Prioritized list of future enhancement projects

Step 7a: Report Writing Tool Strategy

OU has asked that, once the demonstration scripts are developed, we end our project work associated with selecting the final vendor.

With this in mind, it will be very difficult to complete a Report Writing Tool Strategy without a completed vendor selection process.

To help OU complete this strategy, we will provide OU with a high-level set of Report Writing requirements and a set of strategies for deploying a standard set of Report Writing tools. We will provide this information at no additional cost as part of the deliverables above.

Step 7b: Data Warehouse Analysis and Strategy

Objectives:

- Develop a Vision for the Data Warehouse capability needed by OU
- Define OU's data warehouse requirements and include in the SIS RFP

Approach:

- Conduct workshops with the appropriate groups to define a DW Vision for OU
- Using Data Warehouse (DW) requirements from our own intellectual capital and from Advantiv, we will develop a draft set of potential requirements for DecisionDirector
- Conduct workshops with the appropriate DW team to review/refine the DW requirements and the staff that should participate in a DecisionDirector survey to refine the DW requirements
- Utilize the DecisionMaker tool to survey an appropriate group of OU stakeholders to determine their view of importance level of each of the potential requirements
- MTC will consolidate the DecisionMaker findings and develop a set of PowerPoint charts to review these quantitative answers
- Conduct workshops with the appropriate OU personnel to refine the survey outcomes
- MTC will assist OU in developing up to three (3) DW-related test scripts for the vendor demonstrations

Deliverables:

- A Vision for what a Data Warehouse means to Ohio University
- A set of university-wide requirements doing data reporting and analysis

Step 7c: Portal Strategy

Objective:

- Develop a Vision for the Portal function needed by OU
- Define OU's portal requirements and include in the SIS RFP

Approach:

- Conduct workshops with OU's ESC and other appropriate groups to define a Portal Vision for OU
- Using Portal requirements from our own intellectual capital and from Advantiv, we will develop a draft set of potential portal requirements for OU
- Conduct workshops with the appropriate Portal team to refine the Portal requirements
- Utilize the Advantiv DecisionMaker tool to survey an appropriate group of OU stakeholders to determine their view of importance level of each of the potential requirements
- MTC will consolidate the DecisionMaker findings and develop a set of PowerPoint charts to review these quantitative answers
- Conduct workshops/interviews with key OU stakeholders to gain an understanding of the underlying needs that drove the survey findings and to further refine the needs statements and associated prioritization

Deliverables:

- A Portal Vision for Ohio University
- A set of university-wide requirements for the portal

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| <u>Project Step</u> | <u>Projected Timeframe</u> |
|----------------------------------|-----------------------------------|
| Step 1: Kickoff | January 31 |
| Step 2: Change Mgmt | January 31 – February 24 |
| Step 3: Requirements | February 22 – April 10 |
| Step 4: Develop RFP | March 22 – May 1 |
| Step 5: Vendor Evaluation | April 10 – May 1 |
| Step 6: Oracle Project Review | March 22 – April 11 |
| Step 7a: Report Writing Tool | N/A |
| Step 7b: Data Warehouse Strategy | February 27 – April 11 |
| Step 7c: Portal Strategy | March 3 – April 11 |

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Project Processes

- **Project Planning**

- **Status Reporting**
 - ❑ **Progress Against Project Plan**
 - ❑ **Issues Tracking**
 - ❑ **Regularly Scheduled Meetings**

- **Change Control, if needed**
 - ❑ **Change Request Form**
 - ❑ **Change Control Log**

- **Deliverable Sign-off**

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