

# KMS Implementation Roadmap

Sample Excerpt



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## 1. Executive Summary

### 1.1 Overview

The **KMS Implementation Roadmap** provides the direction and supportive information necessary to successfully perform the work required to install, integrate, and deploy the system into an operational environment and prepare the software for use in a production environment.

### 1.2 Project Goals & Objectives

#### Project Goals

The primary goal of the project is to put in place an appropriate mix of strategies, plans, methods, and techniques to support a successful implementation of KMS within Customer Services. This goal supports the assimilation of necessary human experience, customer services process and procedural knowledge, and technologies together in a seamless project plan.

Secondary objectives include:

- Establish a structured approach, methodology and process for future KMS implementations within additional Commercial business units.
- Provide a formal KM product installation path to implement and launch self service and multi-channel services.

#### Project Objectives

- Implement KMS Customer Services activities in 2009. The project is estimated at five months elapsed time from the commencement to project end. As a place holder, a start date of June 15<sup>th</sup> would result in a completion date of November 15<sup>th</sup>.

### 1.3 Implementation Approach

The KMS implementation project will be supported with the use of **Knowledge Compass**® **KM Implementation Methodology** as shown below.



**1.4 KMS – Time to Value**

The planned timeframes to successfully implement KMS within Customer Services is estimated at 5 months elapsed time from the commencement to project end. The plan also has a planned contingency phase of one month, if required. The June 15<sup>th</sup> start date and November 15<sup>th</sup> end date are ‘place holders’ for planning purposes.

#	Phase	Start	End	Duration	Q2 - 2009			Q3 - 2009			Q4 - 2009		
					April	May	June	July	August	September	October	November	December
1	Plan	6/15/2009	7/15/2009	22			■						
2	Organize	6/30/2009	7/30/2009	22			■	■					
3	Establish	7/1/2009	8/1/2009	23			■	■					
4	Position	7/15/2009	9/15/2009	44			■	■	■				
5	Exercise	9/1/2009	11/1/2009	44					■	■	■		
6	Go Live	10/15/2009	11/15/2009	22							■	■	
7	Contingency	11/15/2009	12/15/2009	21									■

The actual 2009 project start and end dates will be included upon approval of the KMS Project.

**1.5 Implementation Project Risks & Mitigating Actions**

Risk	Mitigating Action	Value Date
1. User acceptance of changing work habits in use of the new KM System	Management support on aligning knowledge handling with employee reviews, recognition, incentives and compensation.	Prior to Project Commencement - TBD
2. KM Vendor Bankruptcy / Acquisition / Merger etc. – Unable to Implement or Support Software	KM Vendor Source Code Software in recognized Escrow Account and instructions for Generating Object Code.	Prior to Project Commencement - TBD

**1.6 Implementation Outstanding Decisions**

Decision	Impact	Value Dates
1. CFA approval for KMS Project.	Required to commence negotiations with KM Vendor and start-up of the KMS Implementation Project.	Prior to Project Commencement - TBD
2. Project Roles – IT and Customer Services	The lack of agreement on project roles will hold up the identification of the professional services within the SOW	Prior to Project Commencement - TBD
3. In Phase 1 Implement KMS as standalone Web Application or implement as both Web Application and Integrated with Siebel CRM.	Required to support the planning and implementation efforts for both the KMS and Siebel Teams.	Prior to Project Commencement - TBD
4. For Siebel implementation – User operate Knowledge Session in Siebel or in KMS Portal (with automatic launch from both systems)	Required to support the planning and implementation efforts for both the KMS and Siebel Teams.	Prior to Project Commencement - TBD

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5. Convert and enhance exiting knowledge documents or convert and migrate 'as is' into the new KMS Knowledge Base.	Required to support the planning and implementation efforts for the KMS Team.	Prior to Project Commencement - TBD
6. KMS Pilot test include activity with Legal, Regulatory, Marketing & Medical Affairs personnel.	Required to support the planning and implementation efforts for the KMS Team.	Prior to Project Commencement - TBD

### 1.7 Implementation Project Problems & Mitigating Actions

Problems	Mitigating Action	Value Date
1. Procurement and receipt of the required HW Servers	Receive commitment on use of back-up server use with spare capacity.	Prior to Project Commencement - TBD
2. Conflicting activities for Customer Service employees required to support KM Implementation Project	Resolve conflicts and receive commitment and support from Customer Services Management on KMS implementation.	Prior to Project Commencement - TBD
3. Conflicting activities for IT employees required to support KM Implementation Project	Resolve conflicts and receive commitment and support from IT on KMS implementation.	Prior to Project Commencement - TBD
4. Conflicting activities for KM Vendor resources required to support KM Implementation Project	Resolve conflicts and receive commitment and support from IT on KMS implementation.	Prior to Project Commencement - TBD

### 1.8 Accompanying Documents

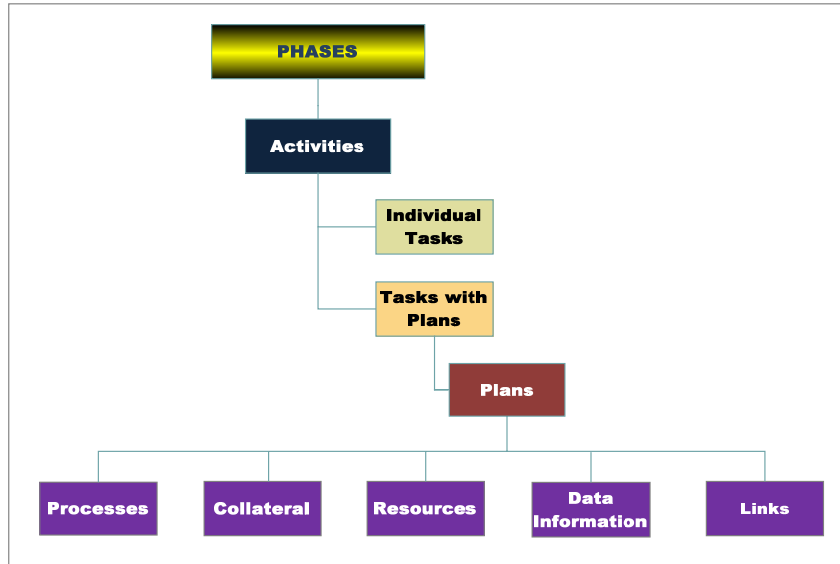
The Implementation Roadmap Project Plan (MS Project) is an accompanying document that supports the scope and approach of the KMS Implementation Project.

Upon commencement of the KMS Implementation the Roadmap will be revisited for enhancement and input into MS Project. Also, the Project Risk and Problem Management Processes will be handled in MS Project. Change Management will be directed to the corporate IT Change Management Process and System.

## 2. Project Scope & Approach

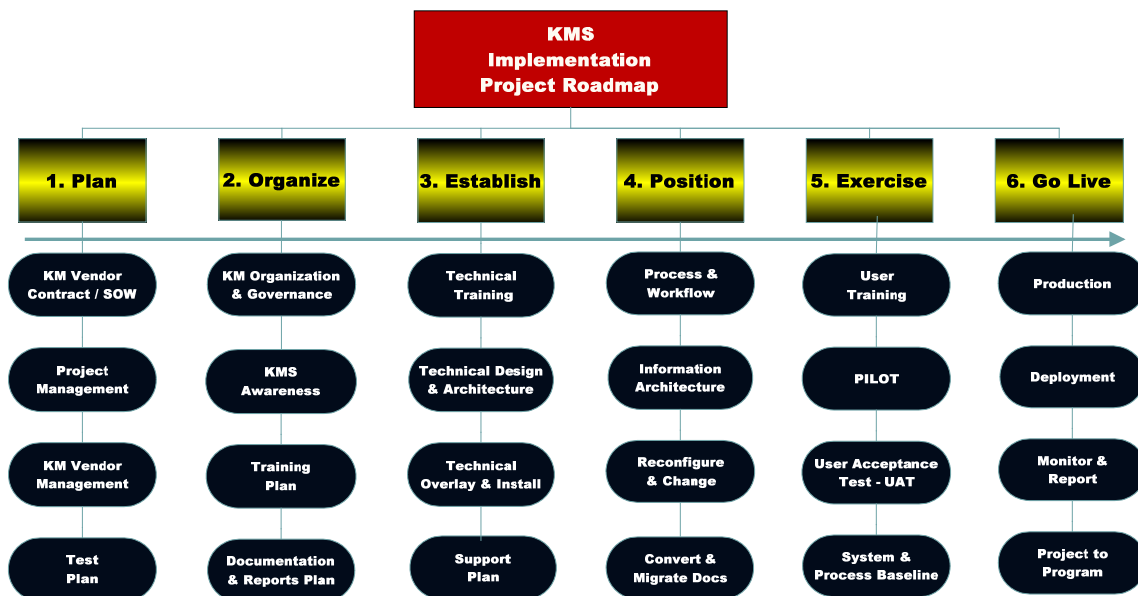
### 2.1 Overview

The KMS project is organized with six Phases that segment the key work efforts to successfully implement KMS within Customer Services. Each Phase consists of four focused implementation activities and an array of individual tasks and larger more complex tasks that require formal plans. The formal plans consist of instruction, materials, and links with other project activities and tasks.



### 2.2 KMS Implementation Roadmap

The stages and key work activities for the KMS Implementation Project are presented below.





Please refer to Sections 6 – 11 for the detail that supports each of the six **KMS Project Phases** presented below.

### 1. Plan

**Plan Phase** is focused on completing the necessary planning and negotiating activities required to approve the KM Vendor contract and Statement of Work (SOW); creating the project charter and master project plan to support project governance and quality; creating key performance project and program metrics, decision points, and reporting activities; identifying and engaging project business and technical resources; confirming and procuring required KMS server hardware configuration; establishing framework to manage the KM Vendor's SOW (resources, software, and implementation services) within the master project plan; and developing and publishing KMS Testing and Acceptance Plan.

### 2. Organize

**Organize Phase** is focused on establishing a Customer Services KMS Program organization structure and governance; identifying users and KMS roles; raising the visibility, awareness, and acceptance of KM and KMS within Customer Services activities; designing and developing customized KMS training programs (eLearning and Class Room sessions) for users, and technical / system administrator employees; and customizing the KM Vendor's user and technical documentation and reports.

### 3. Establish

**Establish Phase** is focused on conducting technical training for KMS installation and support employees, creating technical architecture and design, configuring, installing, and testing KMS servers, implementing KMS environments; installing Vanilla KM Vendor software set-up within KMS development environment; conducting KMS ALFA testing; and developing and establishing a support activity for project and post project (production) environments.

### 4. Position

**Position Phase** is focused on integrating and aligning KMS within Customer Services' inbound and outbound process environment; embedding the Information Architecture's components into KMS (content catalog, taxonomy, metadata, and search and browse); designing and implementing Authoring Process Workflow; developing and implementing changes (tables and software) to KMS (as required); conducting KMS BETA testing; and converting and migrating existing knowledge documents to the KMS knowledge base.

### 5. Exercise

**Exercise Phase** is focused on training Customer Services' user community employees; providing users with access to KMS 'Sand Box'; carrying-out Pilot and adjusting and/or changing KMS (tables, software and processes) as required; conducting User Acceptance Test (UAT) and adjusting an/or changing KMS (tables, software and processes) as required; and baseline KMS and the Customer Services KM associated processes.

### 6. Go Live

**Go Live Phase** is focused on placing KMS into a production environment and final testing; deploying KMS to user desktops, monitoring and reporting on KMS deployment; and handing off of KMS from the KMS Project to the Customer Services KM Program.

## 3. KMS System Overview

### 3.1 Overview

KMS offers integrated information and knowledge handling services for networks of participants, e.g. active knowledge workers, in knowledge-intensive business processes along the entire knowledge life cycle from authoring to publishing.

KMS can be used for a wide array of cooperative, collaborative, adhocracy and hierarchy corporate business communities and, virtual organizations to manage knowledge document content; activities, interactions and work-flows purposes; projects; works, networks, departments, privileges, roles, participants and other active users in order to extract and generate new knowledge and to enhance, leverage and transfer in new outcomes of knowledge providing new services using new formats and interfaces and different communication channels.

### 3.2 KMS Perspective

KMS is a system that has the capability to operate as:

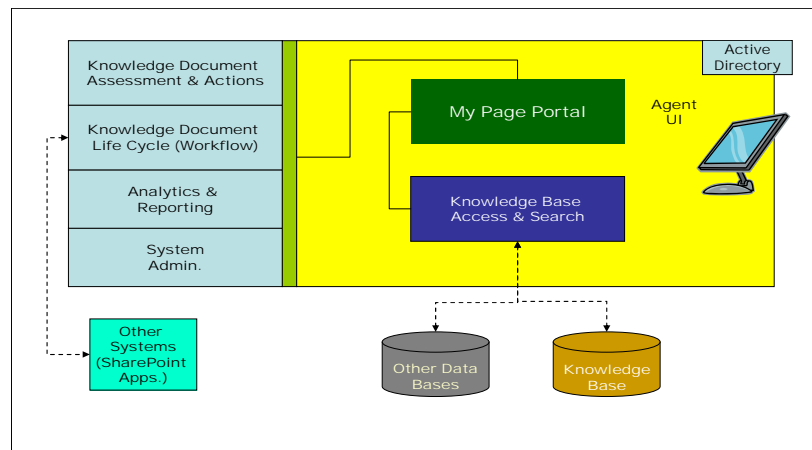
- A Web application as a stand alone
- An application integrated with Siebel 8.0 (in future phases supported by an addendum Siebel integration functional specification).

### 3.3 KMS Components as Modules

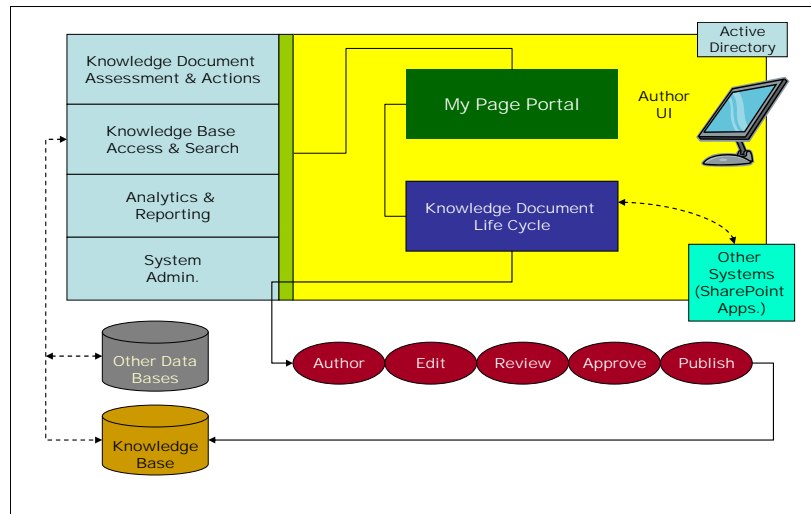
KMS is comprised of the following functions expressed as Modules:

- My Page Portal
- Knowledge Base Access & Search
- Knowledge Document Assessment & Actions
- Knowledge Document Life Cycle
- Analytics & Reporting
- System Admin.

### 3.4 KMS High-level Functional View: Agent

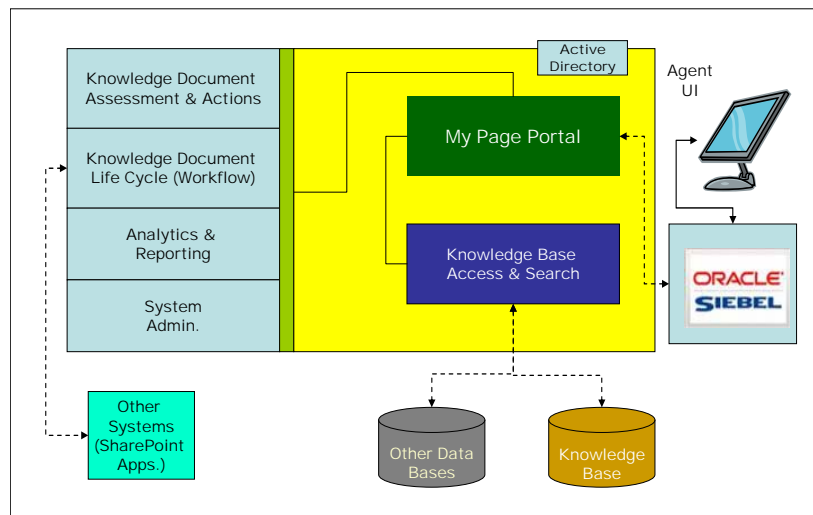


### 3.5 KMS High-level Functional View: Author



### 3.6 KMS High-level Functional View: Siebel

This functionality is not included in this document. This Functional View is for informational purposes only.



### 3.7 KMS Reference Documents

The below documents support the KMS Implementation Project:

- KMS User Requirements – V1.0 - 050809**
- KMS Information Architecture – V1.0 – 050809**
- KMS Functional Specifications – V1.0 - 050809**

## 4. KMS Technical Track

### 4.1 KMS Technical Activity Blueprint

The below table provides a blueprint of the KMS technical track that includes all installation, integration, and testing project activities.

Phase	Activity	Install	Configure	Upload	Test	QA
3	KMS Servers HW & SW (1) (2)	▲	▲	▲	▲	▲
3	KMS SW Development & Testing Environments - <i>Vanilla</i> (2) (3)	▲	▲	▲	▲	▲
4	KMS SW Development Environment – <i>Customized</i> (2) (3) (4)		▲	▲	▲	▲
4	Knowledge Documents (5)			▲	▲	▲
5	KMS Pilot (6)				▲	▲
5	KMS SW Development Environment – <i>Customized</i> (7)		▲		▲	▲
5	User Acceptance Test ((UAT) (8)				▲	▲
5	KMS SW Development Environment – <i>Customized</i> (9)		▲	▲	▲	▲
6	KMS SW Production Environment(10)	▲			▲	▲
6	KMS Deployment (11)				▲	▲

Notes:

- (1) Servers (HW & SW) procured in Phase # 1 with KM Vendors configuration Requirements.
- (2) Install with Installation Guide developed in Phase 1.
- (3) Includes KMS System, Performance & Integration Testing in compliance with KMS Project Testing Plan develop and baseline in Phase 1.
- (4) Customize – Reconfigure and Change KMS – with approved changes from the Use Cases, Functional Specification, and Information Architecture activities / tasks undertaken in Phase 4.
- (5) Convert, migrate and upload knowledge documents into KMS Knowledge Base based on approved Information Architecture decisions for Content Catalog, Taxonomy, Metadata, and Search & Browse.
- (6) Conduct PILOT - approve and baseline PILOT Plan completed in Phase 5.
- (7) Customize – Reconfigure and Change KMS – with approved changes from the PILOT conducted in Phase 5.
- (8) UAT conducted in accordance with the KMS Test Plan approve and baseline in Phase 1 and the Use Cases approve and baseline in Phase 4.
- (9) Customize – Reconfigure and Change KMS – with approved changes from the PILOT conducted in Phase 5.
- (10) KMS is placed into production supported by the KMS Production Plan approve and baseline in Phase 6.
- (11) KMS is deployed to targeted user desktops supported by the KMS Deployment Plan approve and baseline in Phase 6.

## 5. Plan Phase # 1

### 5.1 Description & Purpose

**Plan Phase** is focused on completing the necessary planning and negotiating activities required to approve the KM Vendor contract and Statement of Work (SOW); creating the project charter and master project plan to support project governance and quality; creating key performance project and program metrics, decision points, and reporting activities; identifying and engaging project business and technical resources; confirming and procuring required KMS server hardware configuration; establishing framework to manage the KM Vendor's SOW (resources, software, and implementation services) within the master project plan; and developing and publishing KMS Testing and Acceptance Plan.

### 5.2 Phase Work Scope

The scope of this phase provides tasks for the completion of deliverables that support the below phase activities.

- **KM Vendor Contract /SOW**
  - KM Product License Contract
  - Professional Services Contract
  - Statement of Work - SOW
- **Project Management**
  - Project charter
  - Project plan
  - Resource management – Implementation Project
  - Resource management – On-going Support
  - Problem management plan
  - Risk management plan
  - Quality assurance (QA) plan
  - Metrics and reporting – Implementation Project
  - Metrics and reporting – Production Support
  - Server configuration & procurement
  - Desk Top: KMS XP and other Software Versions Requirements
- **KM Vendor Management**
  - KM Vendor Management Plan
  - Operating policies and process
  - SOW plan integration with master KMS project plan
  - Metrics and status reporting on contracted services
- **Test Plan**
  - Installation Plan & Scripts
  - System Plan & Scripts
  - Integration Plan & Scripts
  - Performance Plan & Scripts
  - User Acceptance Testing (UAT) Plan & Scripts

### 5.3 Phase Milestones / Exit Criteria

The key milestones for the Plan Phase include:

- Approve KM Vendor contract and Statement of Work (SOW)
- Baseline project charter
- Baseline project plan
- Identify and engage required business and technical resources (Internal & External)
- Identify on-going KMS technical support resources
- Establish KM Vendor management environment
- Agree KM project & program metrics and reporting activities
- Receive and secure KMS Servers (with required configuration)

### 5.4 Resource Requirements

The resource requirements required to support the Plan Phase include:

#### Biogen Idec Resources

- KMS Project Sponsor
- KMS Project Manager
- Implementation Team Members
  - Procurement Specialist
  - Knowledge Management (KM) Analyst
  - Technical Specialist – Server Installation
  - Technical Specialist – Software Installation
  - Software Support Specialist
  - Business Analyst
  - Trainer
  - Workforce Management Analyst

#### KM Vendor - TBD

- Contract Specialist
- Account Manager
- Technical Consultant
- Support Consultant
- Training Consultant
- Professional Services Consultant

## 5.5 Phase Tasks

The key work tasks that support the successful completion of the Plan Phase are below.

Activities	Tasks	Role Requirements
<b>KM Vendor Contract</b>	1. Provide Contract & SOW for Legal Review	KMS Project Sponsor Procurement Specialist Project Manager
	2. Receive & Review Legal Contract Changes	
	3. Forward Contract Legal Changes to KM Vendor	
	4. Request Certified Copy of Board List of Authorized Signatures	
	5. Prepare Counter Financial Proposal	
	6. Forward Counter Financial Proposal - KM Vendor	
	7. Negotiate KM Product License Contract	
	8. Negotiate Professional Services Contract	
	9. Negotiate Statement of Work - SOW	
	10. Obtain Authorized Signature on Contract	
	11. Forward Signed Copy to KM Vendor for Signature	
	12. Forward Completed Contract to Corporate File	
<b>Project Management: Planning</b>	1. Develop Project Charter	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Review & Approve Project Charter	
	3. Develop Master Project Plan	
	4. Review & Approve Project Plan	
<b>Project Management: People Resource Management</b>	1. Create Project Resource Management Plan	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Review & Approve Resource Management Plan	
	3. Engage Internal Resources	
	4. Engage KM Vendor Resources	
	5. Identify & Select Steering Committee Members	
	6. Create Steering Committee Charter	
	7. Distribute Steering Committee Charter	
	8. Identify & Select User Support & Testing Team Members	
	9. Create User Support & Testing Team Charter	
	10. Distribute User Support & Testing Team Charter	
	11. Identify & Select Potential KMS User Team Members	
	12. Create Potential KMS User Team Charter	
	13. Distribute Potential KMS User Team Charter	
<b>Project Management : Problem Management</b>	1. Prepare Problem Management Plan	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Review & Approve Problem Management Plan	
	3. Create Problem Capture & Register Templates	
	4. Review & Approve Problem Capture & Register Templates	
<b>Project Management: Risk Management</b>	1. Prepare Risk Management Plan	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Review & Approve Risk Management Plan	
	3. Create Risk Capture & Register Templates	
	4. Review & Approve Risk Capture & Register Templates	
<b>Project Management: Quality Assurance</b>	1. Prepare Quality Assurance Plan	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Review & Approve Quality Assurance Plan	
	3. Create Quality Assurance Templates	
	4. Review & Approve Quality Assurance Templates	
<b>Project Management: Metrics &amp; Reporting</b>	1. Identify Project & Program Metrics	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Identify Project & Program Report Formats	
	3. Create Project Reporting Plan	
	4. Review & Approve Project	
	5. Establish Project Status Reporting Schedule	
<b>Project Management: KMS Server Procurement</b>	1. Identify HW Servers & Configurations required for KMS installation	KMS Project Sponsor Project Manager Business Analyst
	2. Approve Servers Procurement	
	3. Order Servers Procurement with required KMS configuration	
	4. Identify Servers physical location	
	5. Receive and secure Servers (on receipt)	

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<b>Project Management: Desk Top SW Requirements</b>	1. Identify Desk Top Configuration Requirement GAP for KMS installation	KMS Project Sponsor Project Manager Business Analyst
	2. Provide GAP Information to IT for Resolution	
	3. Provide GAP Resolution	
	4. Review & Approve GAP Resolution	
<b>KM Vendor Management</b>	1. Identify and agree Policies	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	2. Identify Interaction Points, Activities, and Resources	
	3. Identify Critical Success Factors (CSFs)	
	4. Establish Metrics and Reporting	
	5. Identify And Agree Meeting Schedule	
<b>Test Plan</b>	1. Develop Testing Plans	KMS Project Sponsor Project Manager KM Analysts Business Analyst
	a. Installation Test Plan	
	b. Component Test Plan	
	c. Integration Test Plan	
	d. Performance Test Plan	
	e. User Acceptance Testing (UAT)	
	2. Select Vendor Content for Use	
	3. Update Testing & Acceptance Plan with Vendor Content, as Required	
	4. Review and Approve Test Plans & Scripts	
	5. Create Test Scripts	
	6. Approve Test Scripts	

### 5.6 Best Practices Précis

The objective of the Best Practices Précis section is to provide successful case in points of techniques, methods, and procedures successfully used in the implementation of KMS Systems within Fortune 500 customer services type activities.

- **KM Vendor Contract**
  - Create counter proposal on financial proposal for winning KM Vendor; starting point should be 20% or less than submitted proposal.
  - Identify specific tasks in project plan and request revised SOW; decline KM Vendor project manager services as their resources would be integrated with Biogen Idec KMS project plan.
  - Contract Legal Review for detailed terms and conditions (T&Cs).
  
- **Project Management**
  - Create and manage project within a structured phase gate project management approach and methodology.
  - Create project charter and obtain approval of all stakeholders.
  - Develop a MS Project Plan and update daily with online access by all stakeholders.
  - Identify metrics that measure the effectiveness and efficiency of the KMS Project and the KMS operating in the production environment.
  - Publicize the project plan and sub plans. Distribute regular and relevant status information by e-mail to all stakeholders. The more people who are intimately familiar with project and action plans, the less cause there is for a misstep. Broad access increases the chances of catching a potential problem that a project manager may have missed.



- Measure productivity measurement, such as meeting deliverables, defect detection, resource utilization and rework.
- Establish problem, risk and change management processes to ensure proper escalation processes are in place for life of the project.
- **KM Vendor Management**
  - Proactively manage the KM Vendor's SOW.
  - Agree Change Order process for SOW changes.
  - Clarify expectations for reporting, issue management and deliverables and penalties for not meeting those expectations. Obtain these agreements in writing.
  - Agree travel policy and T&E submission process.
  - Obtain KM Vendor Resource Time Sheets and T&E Reports weekly.
  - Obtain a weekly list of Vendor people who will be visiting the company facility.
- **Test Plan**
  - It is critical to test early and often to ensure that the project is meeting deliverables timing and quality objectives throughout the project.
  - Hold walkthroughs, for example, end-user style demonstrations, peer-to-peer code inspections, information inspections, etc., at various stages of the project to ensure that the quality is whenever possible to minimize postproduction problems.
  - Create formal detailed test plans..
  - Create Test scripts for each Test Plan; use the Use Cases created in the analysis and workflow activity as the base of the user test scripts.