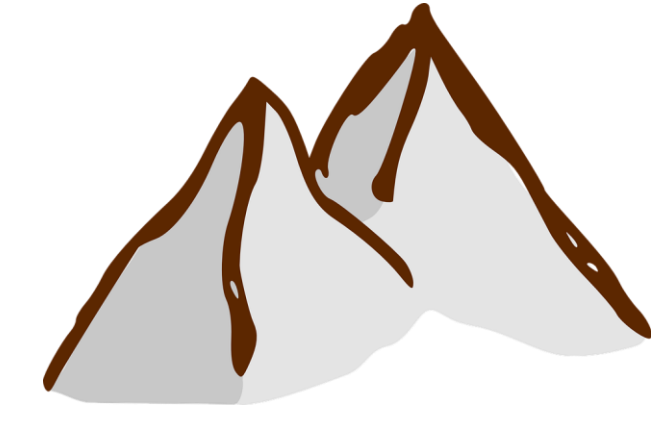


Information Systems: From a Project Request to RFP Preparation

Continuous Improvement: A Project Manager's View

The Challenge



A department on campus requests support to implement a new information system and requests project lead support from the Project Management Office.

How do we manage a complex process and balance engagement, expediency and quality? If we manage this process well, we see positive outcomes:

- Identify the right requirements
- Engage the right stakeholders
- Attract the right vendors to respond to the RFP
- Get to the implementation phase with the right amount of time

The Stakeholders

Who are the stakeholders in this process?

- Business client and management
 - Requirements
 - Approvals
- Information Systems & Technology
 - SSO
 - Integrations
 - Data management
- Procurement
- Security/Privacy
- Finance (Financial Systems Assessment Committee (FSAC))
- Change Management
- Accessibility (WCAG 2.0)
- Additional depending on the project



The Tools / Approach

What do we use to help move from start to RFP?

- Project/Initiative Request form (UWaterloo Help Portal)
- RFI or general market research
- Project charter (Scope, Time, Cost)
- Planning software (Jira, MS Project)
- Business case
- Requirements documents
- Business process review
- Procurement documentation such as RFP written/demo requirements, bid table, statement of work
- Information Risk Assessment
- Change Management Assessment

The Path Forward

Continuous Improvement Questions:

- Do we consider an environmental scan of what systems are currently on campus and how we can leverage these or collaborate?
- What stakeholders do we engage and when? Once we identify stakeholders, do we leverage a stakeholder register?
- We always use a project charter but should we also consider drafting a business case?
- How do we effectively obtain project approval (stage-gates to begin project; to post RFP etc.)?
- How do we communicate timelines to different stakeholder groups in order to 'sync' participation towards common goals?
- Do we inform procurement on our progress ongoing in building out procurement documentation?
- Do we consider a phased approach (two phase project approach (Phase 1: Project request to RFP and Phase 2: Contract signing to Go Live))

