CMU 2811
REQUEST FOR PROPOSAL
Section 5.5.4: Deployment and Initial Support

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Contents

1.0   Introduction

Section 5.5.4 provides activity and responsibility guidance to the System Integrator as it prepares its response and is not meant to replace or dictate the System Integrator's methodology or approach. CMU asks that the System Integrator clearly indicate any material exceptions to the contents of this Section 5.5.4 to CMU. The System Integrator shall review all RFP documents, including other Schedules and Exhibits, to understand the expected services represented in this document.

Services Overview

Section 5.5.4 Deployment and Initial Support services include the applicable activities required to complete rollout.

It is expected that the Supplier will leverage the work and deliverables created during the Configuration-Build-Test phase to deliver Deployment and Initial Support services and deliverables that are specific to the ERP software and will include any other 3rd party and legacy solutions that will be retained by CMU and are part of the end-to-end solution. Section 5.5.4 also includes the appropriate evolution and continuation Value Realization services as well. Expertise in CMU's industry and thought leadership will be key success factors in the Supplier's ability to be the kind of partner CMU is seeking.

Section 5.5.4 Services will be delivered in collaboration with the CMU team and other relevant 3rd parties as required. These services include the following for each implementation phase or wave associated with the Supplier's proposed implementation approach:

- **Deployment Services** include final preparation at each rollout location (if applicable) as well as within the support organization from pre-cutover through cutover and Go Live.

- **Initial Support Services** include immediate post-cutover support through a defined warranty period of 180 days from Go-Live as well as support transition to the intended CMU support team (including any 3rd parties working on behalf of CMU).

- **Value Realization Services** include continued management and refinement of the "go-live" business case to ensure alignment with the solution being deployed, with the overall goal to drive benefit accountability and to act as a key change lever.

The term "knowledge transfer" as used in this Schedule, includes: (a) "hands-on" training throughout all core activities through collaboration and working side-by-side with CMU team members; (b) proactively pointing out and explaining best practices related to methods/tools being used, process improvement opportunities, and technology leverage opportunities; and (c) providing full transparency via clear documentation of configuration, build, and test work products and deliverables to the point where the relevant CMU team member(s) are satisfied that they understand the content.

1.1   Coordination with Other Planned/In-Process Initiatives

The CMU Program Leads, with the support of ERP Steering Committee as well as CMU Project Managers assigned to various relevant projects, and the IT group will coordinate with other planned or in-process initiatives and inform the Supplier of any potential impacts. CMU's planned governance structure and processes will provide support to any key decisions that result from any associated inter-dependencies.

2.0   Deployment Services

Deployment Services include final preparation for rollout as well as within the support organization from pre-cutover through cutover. These services also include: assisting with the completion of a pre-implementation project internal audit, site business operational readiness (i.e., policy/process/procedures),

site-data readiness, site end user readiness, ERP/IT support readiness, site governance readiness, and supplier/customer/key third party partner readiness.

The Supplier will utilize a proven methodology and associated tools to support the deployment effort. Furthermore, the Supplier will proactively apply industry, process, and solution expertise to minimize customer impact, downtime, downstream re-work and to optimize the end-to-end business process and technical performance of the deployed solution.

Table 2 identifies the roles and responsibilities associated with these services. The Supplier should strongly consider CMU's services expectations set forth in Table 2 when developing the Supplier's proposal response.

Table 1.   **Deployment Roles and Responsibilities**

Deployment Roles and Responsibilities	Supplier	CMU
1. Throughout the Deployment Services effort, the Supplier will consider the CMU business context and impacts by working collaboratively with CMU Business Process Leads, Functional Leads, and SMEs in all Deployment activities.	X	
2. Collaborate with CMU PMO and Business Process Leads to determine deployment activities, minimize disruptions and coordinate communication.	X	
3. Throughout the Deployment Services effort, the Supplier will consider the CMU data, security, infrastructure, integration, support, etc. context and impacts by working collaboratively with CMU IT process owners, leads, and SMEs in all Deployment activities. The Supplier will also consider timing (e.g., period close, peak activity) in all Deployment activities.	X	
4. Prepare and manage the pre-go-live countdown checklist of activities required for deployment, including site readiness (e.g., specific operational preparation activities). Advise CMU as to "go/no-go" decision.	X	
5. Participate in site readiness planning for corporate and field sites.		X
6. Prepare and manage the go-live cutover plan of activities required for each go-live. Advise CMU on the readiness of the solutions to support business post cutover.	X	
7. Coordinate dress rehearsals of the pre-go-live countdown checklist and activities as well as the go-live cutover plan to validate timing of go-live activities.	X	
8. Collaborate with the CMU Program Leads and PMO in validating and adjusting roll-out schedule, milestones, and detailed plan; collaborate with OCM for communication to stakeholders.	X	
9. Provide required policy changes and prerequisite process changes to support the optimal usage of the new solution.		X
10. Oversee that end users are trained and entirely familiarized with the deployment solution.		X
11. Work collaboratively with the CMU Technical Architect to ensure that solution architecture is in place for data integration to required retained applications, BI, Data Warehouse, etc. components necessary for go-live.	X	

Deployment Roles and Responsibilities	Supplier	CMU
12. Provide required data definitions and data governance roles and processes to effectively and efficiently manage one source of truth for master data with high data integrity.		X
13. Transfer target state data definition knowledge to CMU data stewards.	X	
14. Assist with dispositioning and closing out all high priority issues coming out of final User Acceptance Testing (UAT) activities.	X	X
15. In collaboration with the CMU Program Leads and PMO, provide all operations and administration procedures and tools related to code migration across environments.	X	
16. Provide a testing environment to conduct regression testing to enable effective and efficient release and configuration management.		X
17. Fill post-Go Live IT support roles and provide the required capacity and capabilities.		X
18. Provide the appropriate resources to assist CMU in post-production support.	X	
19. Provide required contact center, help desk, and associated governance processes, procedures, portals, and tools for effective transition and ramp-up to post-production support.		X
20. Provide performance metrics to monitor during hyper-care support		X
21. Deploy mobile technology platforms and device support for mobile-enabled processes.		X
22. Store and make accessible all specifications and other design/configuration/development/testing/training documentation.		X
23. Decommission legacy systems that have been replaced/retired.		X
24. Provide knowledge transfer to CMU IT for all Supplier-developed objects and associated tools/operating/support procedures.	X	
25. Provide governance to manage pre-deployment issues, risks, and decisions, the project team, and senior leadership/steering committee stakeholders.		X
26. Assist with developing Supplier, CMU, and other key third-party readiness checklists and accountability as well as assessing related readiness risks.	X	
27. Manage pre-go-live Supplier, CMU, and other key third-party readiness activities.	X	
28. Approval or rejection of all Deployment deliverables and "go/no-go" decision for each discrete go-live.		X
Data Migration Specific Activities		
29. Create final data migration cutover plan, schedule, and procedures; include data recovery/back-out plan.	X	
30. Provide finalized Data Retention and Archiving requirements for retaining and archiving historical data.		X
31. Ensure successful Data Retention and Archiving as per the requirements.	X	
32. Validate and approve or reject the pre-cutover data migration.		X

Deployment Roles and Responsibilities	Supplier	CMU
33. Execute the overall data migration plan.	X	
34. Provide all operations and administration procedures and tools related to code migration into production environments.		X

3.0 Initial Support Services

Initial Support Services include immediate post-cutover support through a defined Warranty period of 180 days, enabling CMU support self-sufficiency (including any third parties working on behalf of CMU), as well as assisting with completion of a post-implementation project internal audit.

The Supplier will utilize a proven methodology and associated tools to support the Initial Support effort. Furthermore, the Supplier will proactively apply industry, process, and solution expertise to minimize downstream re-work and to optimize the end-to-end business process and technical performance of the deployed solution.

Table 2 identifies the roles and responsibilities associated with these services. The Supplier should strongly consider CMU's services expectations set forth in Table 2 when developing the Supplier's proposal response.

Table 2. **Initial Support Roles and Responsibilities**

Initial Support Roles and Responsibilities	Supplier	CMU
1. Provide Business Process Leads, SMEs, as well as super users Initial Support in terms of training, trouble shooting, desk side support, reporting capabilities, leadership, and governance.		X
2. Provide IT process owners, leads, and SMEs to work collaboratively with the Supplier in all Initial Support activities and provide internal IT support capacity and capabilities.		X
3. Manage all applicable environments.		X
4. Provide systems management, configuration management, release management, transport/code migration, performance management, security administration, disaster recovery, and other technical administration processes.		X
5. Manage service desk and all associated problem/incident management and monitoring processes.		X
6. Assist CMU with hands-on training-related support.	X	
7. Assist CMU with configuration change (including workflow and security profile setup) related support.	X	
8. Assist CMU with diagnosing data and performance defect related incidents.	X	
9. Fix all defects (including re-testing until approved) for all code developed by the Supplier.	X	
10. Assist CMU with assessing impact of enhancement requests.	X	
11. Determine disposition of all enhancement requests.		X
12. Assist CMU with post go-live stabilization/adoption assessment after go-live and make recommendations to improve in possible subsequent rollouts.	X	
13. Initial Support and Warranty acceptance approval and sign-off (or rejection) for each phase/wave.		X

4.0   Value Realization Services

Value Realization is a work stream that begins during Planning & Design and continues through final deployment, initial support, and ongoing stabilization. This section deals only with the activities associated with final go-live value realization services to provide the specific benefits, metrics, and accountability for measuring post go-live benefits delivery.

The Supplier will utilize a proven methodology and associated tools to deliver Value Realization services aligned with the scope, key strategic themes/drivers, and priorities. Furthermore, the Supplier will proactively apply industry, process, and solution expertise to optimize the engagement and alignment of CMU business and IT stakeholders to the expected benefits for the end-to-end solution being deployed.

Table 3.   **Value Realization Roles and Responsibilities**

Value Realization Roles and Responsibilities	Supplier	CMU
1. Provide Value Realization methodology and tools and provide timely education of the use of the methods/tools to the CMU PMO, Business Process Leads, Functional Leads, and SMEs.	X	
2. Proactively provide industry, solution, and process-specific expertise that will build best practices into the Value Realization activities to optimize business process performance and solution adoption.	X	
3. Working with CMU Functional/Technical Leads, Business Process Leads, and SMEs, refine and complete the development of quantified benefits that are specifically linked to the solution being built. Provide site-specific details as needed.	X	
4. Provide additional insights into quantified value opportunities from Supplier's experience with similar clients and/or benchmark data.	X	
5. Provide specific best practices advice regarding post go-live benefits measurement processes and accountability.	X	
6. Business Value Drivers: For each end-to-end process provide future state governance, SLAs, and measurable Objectives and Key Results (OKRs) and/or KPIs, leveraging previously completed materials.	X	
7. Develop post go-live benefits measurement process, method, and ownership.	X	
8. Approve post go-live benefits measurement process, method, and ownership.		X
9. Validate and finalize any current state baseline cost, volume, effort, and OKR and/or KPI information related to the existing metrics that exist within CMU today.		X
10. Throughout this phase, Supplier will consider CMU business context and impacts by working collaboratively with CMU Business Process Leads, Functional Leads, and SMEs in all Value Realization activities.	X	
11. Review, refine, and approve or reject Value Realization deliverables.		X