



***Project Scope  
Assessment***  
for

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**Customer Name**

## Using the Project Scope Assessment

<b>Completed by:</b>	FACTS Sales Representative. This form is for the local FACTS office internal use only.
<b>Purpose:</b>	To evaluate the scope of the project and determine the number of service hours required to complete it.
<b>How it is used:</b>	On pages 3-6, assign a rating to a number of variables affecting the project scope. Summarize these ratings on pages 7-8 and calculate a subtotal for each group of variables. Add the group subtotals to get a total score. Apply this score to the table on page 9 to evaluate the complexity of the project and estimate the hours required to complete the project.
<b>When it is used:</b>	Complete and use during the sales cycle. It may also be used during Project Definition to help the local FACTS office Project Team become more familiar with the customer account.
<b>Who uses it:</b>	Local FACTS Office only
<b>File under:</b>	Planning/Project Definition
<b>Last revised:</b>	2/97
<b>File:</b>	06impsa.exe

## FACTS Project Scope Assessment

Factor	Question	Level (1 to 3)
<i>Project Size:</i>		
Project duration	<p>The proposed project duration is _____. (3-6 months should be allowed for the FACTS core module, i.e., SO, IC, PO, SA, AP, AR, GL, Payroll)</p> <p>Concurrent projects or additional modules may be done if more resources are allocated.</p> <p>1 = Clearly reasonable 2 = Reasonable 3 = Clearly unreasonable</p>	
Implementation approach	<p>Implementation of applications will be conducted:</p> <p>1. In a phased approach including financial applications in Phase I and distribution applications in Phase II. 2. Without phases and less than 9 modules at one time. 3. Without phases and greater than 8 modules at one time.</p>	
Customer team size	<p>Estimate of customer's team size: (Project leader, backup, training administrator, hardware system administrator, CPA, etc.)</p> <p>1 = Three or fewer members 2 = Four to six members 3 = Over 6 members</p>	
Number of users or terminals	<p>Number of users or terminals that will be used by customer's personnel more than 50% of their day:</p> <p>1 = Four to twelve 2 = Thirteen to thirty-two 3 = Thirty-three +</p>	
Number of sites	<p>Number of physical locations that will use the system(s):</p> <p>1 = One site 2 = Two to three sites 3 = Over 3 sites</p>	
<i>Project Definition:</i>		
Benefits of new system	<p>The benefits of the new system are:</p> <p>1 = Well defined or quantified or of strategic importance 2 = Defined in general, not quantified 3 = Very vague and complex</p>	
User knowledge	<p>Customer personnel responsible for providing application knowledge on the project are:</p> <p>1 = Knowledgeable in both applications and computers 2 = Knowledgeable in applications only 3 = Very little applications knowledge and computer exposure</p>	
Business and industry knowledge	<p>Customer project team members who are highly knowledgeable or experienced in the business and industry area:</p> <p>1 = All 2 = Half 3 = None</p>	
Availability and accessibility of customer documentation	<p>The existence of supporting user documentation, policies and procedures, and any other information including documentation on custom modifications for the customer's existing system:</p> <p>1 = Complete and current 2 = More than 50% complete and current 3 = Less than 50% complete and current</p>	

<b>Factor</b>	<b>Question</b>	<b>Level (1 to 3)</b>
<i><b>Sponsorship and Commitment:</b></i>		
Project sponsorship	The customer's project sponsor is: 1 = Identified and enthusiastic 2 = Identified but passive 3 = Unknown	
Commitment of customer management	The general attitude of the customer management: 1 = Understands the value of and supports the project 2 = Are somewhat reluctant 3 = Are very skeptical or resistant	
Commitment of customer's users	The general attitude of the users: 1 = Understands the value and supports the project 2 = Are somewhat reluctant 3 = Are very skeptical or resistant	
<i><b>Effect on Customer Organization:</b></i>		
Replacement or new system	The new FACTS system: 1 = Replaces an existing, primarily automated system 2 = Replaces an existing, primarily manual system 3 = Is a totally new system	
Effect on computer operations	The effect of the new FACTS system on the computer operations (new hardware) of the organization: 1 = Little change 2 = Moderate change 3 = Severe change	
Policy and procedure changes	Policy and procedural changes required to support the new system: 1 = None 2 = Moderate changes 3 = Extreme changes	
<i><b>Hardware and Software:</b></i>		
Familiarity with operating system	The familiarity of the customer's project team with the operating system to be used: (i.e., AIX, SCO, DOS, Windows, Novell, etc.) 1 = Considerable experience 2 = Some experience 3 = Little or no experience	
Familiarity with language	The familiarity of the customer's project team with the language to be used: (BBx) 1 = Considerable experience 2 = Some experience 3 = Little or no experience	
Availability of hardware for training and testing	Availability of hardware for training and testing prior to going Live 1 = Guaranteed availability 2 = Reasonable assurances of availability 3 = No assurance of availability	

## FACTS Project Scope Assessment

Factor	Question	Level (1 to 3)
<i>Project Staffing:</i>		
Project team dedication	Assignment of the customer's project team: 1 = All members are assigned to the project at least 50% of the time 2 = Half the members are assigned to the project at least 50% of the time 3 = Less than half the members are assigned to the project less than 50% of the time	
Third party on project	Third party participation on the project will be done by: 1 = None or a Local FACTS Office with several successes 2 = A Local FACTS Office with few successes 3 = A non-Local FACTS Office or consulting group	
Team location	The physical location of the project team: 1 = Team is located together 2 = Most of the team is located together 3 = Team is located at several sites	
<i>Project Management:</i>		
Use of a methodology?	The methodology and other standards to be used on the project: 1 = Software Solutions' Methodology 2 = Customer's own methodology or modified Software Solutions' Methodology 3 = No methodology	
Local FACTS Office consultant's experience with FACTS	The number of times the lead FACTS Implementation Consultant has implemented this application: 1 = More than 6 times 2 = Less than 6 times 3 = No knowledge or experience with FACTS	
Customer project leader's experience	The Project Leader's experience level: 1 = 3 or more prior projects of similar scope 2 = 1 or 2 prior projects of similar scope 3 = No prior projects of similar scope	
Project leader's allocated time to project	Amount of time the Project Leader spends managing this implementation project: 1 = 75% of his/her time 2 = 50% of his/her time 3 = 25% of his/her time	
Project management authority	The Project Leader's management authority over team members: 1 = Formal authority over most or all of the team members 2 = Informal authority over most or all of the team members 3 = Responsibility but no authority	
Commitment to TQM	The customer's commitment to quality: 1 = Completely committed 2 = Somewhat committed 3 = Has not yet implemented a TQM process	
Commitment to training and development	The customer's commitment to training and development: 1 = Completely committed 2 = Understands the need and is fairly committed 3 = In the past, time and money has not been committed	

Factor	Question	Level (1 to 3)
<i>Complexity of Requirements:</i>		
Application complexity	Customer's requirements are: 1 = Fairly standard to the wholesale distribution industry 2 = Mostly standard but moderately complex 3 = Very non-standard and very complex	
Technology mix	Number of different platforms: (i.e., UNIX, Novell, Windows, etc.) 1 = One 2 = Two 3 = Three or more	
Software mix	Number of different software packages being integrated: 1 = One 2 = Two to three 3 = Four or more	
<i>Custom Modifications:</i>		
Anticipated custom modifications hours	The anticipated number of custom modification hours is: 1 = Less than 50 hours 2 = 50 hours - 150 hours 3 = Over 150 hours	
Critical nature of custom mods to business	What is the effect on the customer's business of not having custom modifications in place prior to going Live: 1 = Little effect, good workarounds in place 2 = Business is impaired, but workarounds can be used 3 = Business cannot function without modifications	
<i>Conversion Complexity:</i>		
Knowledge of existing file structure	Customer personnel has the following knowledge of the existing file structure: 1 = Very familiar with file structures and contents 2 = Somewhat familiar with file structures 3 = No exposure and experience of the file structures and contents	
Which data to convert	Which data files will be electronically converted: 1 = Master files only 2 = Master files and transaction files 3 = Master, transaction and history	
Status of existing data	Status of existing data on system: 1 = Computerized and available without clean-up 2 = Computerized but will require much clean-up 3 = Not computerized and will need significant preparation and clean-up	
Media compatibility	For an electronic conversion, is there compatible media to capture existing data to the new system: 1 = Yes 2 = No, but there is a workaround to get data onto compatible media 3 = An outside vendor must get involved to assist	

# FACTS Project Scope Assessment Summary

Company name: \_\_\_\_\_

Date: \_\_\_\_\_

Group	Factor	Level (1 to 3)
<i>Project Size:</i>		
	Project duration	
	Implementation approach	
	Customer team size	
	Number of users or terminals	
	Number of sites	
	<b>SubTotal:</b>	
<i>Project Definition:</i>		
	Benefits of new system	
	User knowledge	
	Business and industry knowledge	
	Availability and accessibility of customer documentation	
	<b>SubTotal:</b>	
<i>Sponsorship and Commitment:</i>		
	Project sponsorship	
	Commitment of customer management	
	Commitment of customer users	
	<b>SubTotal:</b>	
<i>Effect on Customer Organization:</i>		
	Replacement or new system	
	Effect on computer operations	
	Policy and procedure changes	
	<b>SubTotal:</b>	
<i>Hardware and Software:</i>		
	Familiarity with operating system	
	Familiarity with language	
	Availability of hardware for training and testing	
	<b>SubTotal:</b>	
<i>Project Staffing:</i>		
	Project team dedication	
	Third party on project	
	Team location	
	<b>SubTotal:</b>	
<i>Continued...</i>		

## Summary

Group	Factor	Level (1 to 3)
<i>Project Management:</i>		
	Use of a methodology	
	FACTS Implementation Consultant's experience	
	Customer's Project Leader experience	
	Project Leader's allocated time to project	
	Project management authority	
	Commitment to TQM	
	Commitment to training and development	
	<b>SubTotal:</b>	
<i>Complexity of Requirements:</i>		
	Application complexity	
	Technology mix	
	Software mix	
	<b>SubTotal:</b>	
<i>Custom Modifications:</i>		
	Amount of anticipated custom modifications	
	Critical nature of custom modifications to business	
	<b>SubTotal:</b>	
<i>Conversion Complexity:</i>		
	Knowledge of existing database	
	What data to convert	
	Status of existing data	
	Media compatibility	
	<b>SubTotal:</b>	

<b>Total Score:</b>							
<p><b>Total Score:</b></p> <p><u>Complexity:</u></p> <table style="margin-left: 40px;"> <tr> <td>1 - 44</td> <td>Low complexity</td> </tr> <tr> <td>45 - 85</td> <td>Moderate complexity</td> </tr> <tr> <td>86 - 108</td> <td>High complexity</td> </tr> </table> <p>See attached Recommended Implementation / Installation Service Hours to determine number of hours to propose.</p> <p>Low complexity projects may fall at the lower end of the range for the specific number of users, while high complexity projects may fall towards the upper end of the range.</p> <p>The above summary groups having a higher than average score should be addressed with your Technical Services Manager or Implementation Consultant prior to quoting Implementation service hours to the customer.</p>	1 - 44	Low complexity	45 - 85	Moderate complexity	86 - 108	High complexity	
1 - 44	Low complexity						
45 - 85	Moderate complexity						
86 - 108	High complexity						



# FACTS Project Scope Assessment

## Recommended Implementation / Installation

### Service Hours

	Small <u>4-8 Users</u>	Medium <u>8-24 Users</u>	Large <u>24+ Users</u>
<b>I. Planning</b>			
Project Definition	1 - 2 hrs (NON - B I L L A B L E / I N T E R N A L M T G.)	2 - 3 hrs	3 - 4 hrs
Project Strategy	2 - 4 hrs	4 - 6 hrs	6 - 8 hrs.
Project Plan	1 - 2 hrs	2 - 4 hrs	6 - 8 hrs
Operations Analysis	8-16 hrs	12-24 hrs	24-40 hrs
<b>II. Installing The System</b>			
Delivery and Setup	8-12 hrs	8-16 hrs	16-32 hrs
Modifications	T O B E D E T E R M I N E D		(Time and Expenses)
Data Conversion	T O B E D E T E R M I N E D		(Time and Expenses)
<b>III. Training and Testing</b>			
FACTS Training	40-50 hrs	50-60 hrs	60-80 hrs
Readiness Assessment	8 - 12 hrs	8-16 hrs	16-32 hrs
<b>IV. After The Install</b>			
First 30 Days	8-12 hrs	8-16 hrs	16-32 hrs
Ongoing Assistance	8-12 hrs	8-16 hrs	16-32 hrs
<b>Project Management</b>	10 hrs _____	12 hrs _____	24 hrs _____
<b>Total Average Hours:</b>	<b>93-120</b>	<b>112-170</b>	<b>184-288+</b>

The above hours are based on typical FACTS installations of moderate complexity. The hours can vary based on project complexity derived from the Project Scope Assessment.