Advice Software Project Plan - Case Study



01



02



PLAN 04 PLAN 05

16 June 2019

PLF

06

Project Management Framework

Business Need, Scope, Budget, Project Team (project manager), Governance Structure

Decide on 3rd Party Consultants

Research Vendors

Choose Vendors to present their advice software offering

PM Methodology Agile vs Waterfall

Vendor Demo Presentation

03

Show case CRM functionality

Short List Vendors for RFP stage

Decide which vendors to proceed to RFP stage.

Request for Proposal Tender (RFP)

Send RFP Tender to Vendor

Vendor Technology Responses

Collate responses of overview of offerings and costs

Stream	inning Software Provider Name	Broncos				
oueam	Core Items	Affe Langer	Cowboys	Titans	Sharks	
No	New to Market how many	Aire Langer	Jonathon Thurston			Eels
NO	clients?	Yes - many dealer groups		Wally Lewis	Paul Gallen	Peter Storing
Integration with other systems	Solution: All-in-one OR API	API Open - no full solution use some	16 Advisors using, 4 dealers in talks. CRM + API	Yes - many dealer groups CRM + API	20 dealer groups (100, 70) plus some IFAs	20000 users 700 practices
		Apps		CKM * API	CRM + API	CRM + API
	Integrate with Office 365	No - email client looking at Plugins	Yes - but not used, unsure how it works	Yes - send / receive	Yes - send / receive	Yes - send / receive
	Integrate with Revenue Software	No - only limited	No - own revenue system built	Yes	Yes	No - manual file upload use ParraLo
	Integrate with Cashflow software	No - in talks	Yes	No	No - in talks plus Yodiee, bankstatements	No
	Other Systems Integrate with:	Testing	Testing	Testing	Testing	Testing Yes - dashboard, objectives, FF
Core Advice System Functionality	Fact Find Module CRM	Yes Limited - Dashboard, contacts, Fact Find, File notes. No Rev FF or area	notes all sorted in Dynamics.	Yes - dashboard, objectives, FF	Yes - dashboard, objectives, FF	hes - agricolità, cojectives, rr
		to see all client record Yes - can be customised using	Sharepoint used for filing No - not yet	Yes	Yes	Yes
	PUSK PTOMET TOO	Highlighter				Yes
		Yes	No	Yes	Yes	
	Research Comparison Tools - Inv/Super/Pension / Insurance	165				
	InviSuper/Pension / Insurance	LAN			P	LAN
	Risk Profiler Tool					Jane 1864
	Feet Feet Meetin Chie)8			09	



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Feature & Costing Score Matrix

Comparison like for like decide on Short List

07

Short List – Advice Case Study Demo2 & Roadmap

Short List to present a pre-prepared case study (Minimum Viable Product)

Vendor Demo incl Tech Roadmap

Software Case Study Feedback

Collate feedback (Office 365 Forms) from a range of stake holders on the advice process and offering

IT Technical Requirement Vendor Comparison

Does the vendor meet your IT Stack requirements

Vendor Due Diligence

Pricing Comparison & Contract Negotiations | Technical Cost Analysis

Further cull of Short list, negotiate pricing with vendor based on approx. licenses used and cost analysis comparison

Trial Logon -> Requirements Traceability Matrix testing

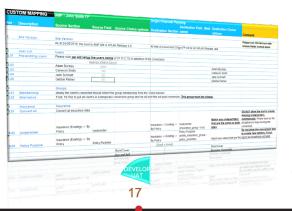
Own testing on end to end advice process



DESIGN 13

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DEVELO UAT DEVELOR UAT



DEVELO UAT 18

Recommendation to Committee/Board

Final Recommendation for approval & select vendor

Project Governance

Decide on 3rd Party Consultants for Implementation

Select Vendor &Sign Contracts

Legal Sign Contract - SOW

Budgets / Order Schedule Licenses

Admin / Hierarchy Setup

Adviser Cost Personas

Implementation Phase

Project Status Report

Project Stream Terms of Reference

Implementation Plan incl timeframes for rollout

Product Implementation Site Config & Coding

AdminSite / Workflows / FF / Advice
Documents / Client Portal / Templates /
Research / APL / Compliance
Checklists / Revenue / Reporting

Data Migration Testing

Data Subset Testing into UAT site Data Mapping Guide / Conversion Schedule

Data Mapping CUSTOM FIELDS

Integration / UAT Testing

Integration other systems

User Acceptance Testing

Business Acceptance Testing

Access Levels - Logons



Project Implemented

Pilot | Final Data Migration | Training

Pilot Program

Final Data Migration

Training

Go Live

Cross Over old system vs new (1-3 months)

Training, Training, Training

Post cut over Testing

Ongoing Support



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