CedarCrestone

Cedar Crestone Interviews

12/3/10 = cedar:

Training Lead - Nancy:

(1) reviewing our material

→ efficiency; effectiness; finance/proc/HR

- existing data warehouse that we want to keep
- build level of excitment for employees.

(2) (1) Strategy - (2) curriculum development - (3) train the trainer →

material development

(4) employ + evaluation of training → (5) Go forth

July 2011 - Start 15 months Jan 2013

(1) Plan update

Compl

e-learning tool included in proposal + cost.

(3) select; CD - content - delivery; (4) classes - feedback - success (5) Plan

$\boxed{\text{assumptions}}$ - 18 month - training lead would be here from the start

- AK's involvment - 3 lead trainers

8^{05}-8^{30}

8^{30}-9

9-9^{30}

9^{30}-10

10-10^{50}

$\boxed{\text{Greatest Risk:}}$ Poor end users adoption; overloaded;

$\boxed{\text{Major State Actions:}}$ participation; commitment of resources

* 8-10 trainers - for Train the trainer + 3 lead trainers; state to assign an ee as the technical resources for the E-learning tool

(3) Been on 2 projects w/ similar challenges - 1-500 locations w/ 2-3 end users each. Flexibility. - been an

(4) expressed interest - because I wanted to do it. They asked company ee's. I have a lot of exp w/ the E learning tool ~~but~~ & when geo grap issues came into plays.

SB

12/3 Cyper

8:32
8:50

Business Process Reengineering Lead Jan

(1) replace old systems; objectives - to make it as painless as possible

(2) (1) Training strategy: assumptions =
(2) Curriculum | MTRL Development:
(3) Train the trainer:
(4) Training Delivery:
(5) Post Production Support:

(1) job analysis - to ensure correct processes
(2) They take ownership on all the training
(3) Train the trainer - pilot first & chg any materials ~~they've might~~
(4) State would delivery the training but they would be in the classrm at first

Greatest risks: end-users need to know why they're going to training; communication ~~[illegible]~~ & good chg man

(3) At end of day when you chg a way/tool on how an ee does their job, so I've learned to work through their fear level. Adults what to know "Why" & communication goes a long way. Do a lessons learned ~~from~~ w/ SOA

~~10 months - been w/ cedarcrestone.~~

(4) ERP implementations for 18 yrs. Was an ee first before an consultant. I know what my clients are feeling since I was an ee who was ~~resistant at first. Focuses on~~ what makes adults tick. Love change managment.

* currently a PM for 3 projects - support part/time ~~would be full time on this project~~ *

8B

[illegible] all chg man for another company, worldwide.

Technical Lead - Wayne

9^{55} - 9^{20}

9^{30} - 10

10^{05} - 10^{55}

(1) Cons. current systems; & give us access to that data; ~~[illegible]~~ Give us better reporting & the ability to report out.

(2) Infrastucture assessment ■ plan in place
procurement of hardware
Data conversion ■ very essential part
Interfaces ■ into & out of the system
Reports ■ very key portion of the process
Customization ■ right amount & right # of customizations
Testing ■ testing of conversions, reports, & customization

- Was not involved w/ writing RFP's, or vendor presentations

(3) Have done a couple statewide presentations
- organizational & chg man are key. Need to identify issues early. Importance of listening to the clients; check your data.

(4) Volunteered for this project - I asked about it
I am personally interested in it.
Have done statewide implementations before, last 6 yrs have been public sector only; population & structure - similar size project implementation before.
- 3 yrs - oracle (wk for oracle not cedarcrestone)
- People soft - many years
*cedarcrestone & oracle consulting - are partners
- Have worked w/ the PM before & some of the other team members.

9:20
9:45

Finance / Procurement Lead – Mary Ann

(1) Read our RFP; want to replace existing system & the State wants to take advantage of software & improve best practice & self service

(2)

Pre Award: "unique to me"

Discovery: - States as is; report identification; interfaces; Gaps; Risk - not having the correct people on project - time - don't have time

Analysis & Design: Fit Gap; write specs; wk w/ techies;

Build & Configure: creating; building reports; interfaces;

Test & Training: integration & user acc testing; training & advisors

Deploy - **Go live:** Rollout & post production support (3 months)

Risks = not Having the correct people on project; not having enough time; to eager to customize;

State: ensure communication - open door, open to ideas; involvement & expectations

(3) Washington DC, [redacted]
conflict of resources at the end of project.

(4) Peoplesoft - [redacted] Finished up City of Milwaukee & live encumbrance Accounting & know the newest release w/ Peoplesoft.
- no problem traveling
- would have to be here - physically.
- Gov't accounting exp - city of Milwaukee; Wash. DC; California
50% of resume is enc. accounting

Minn = current project - will be done w/ that.
- so not participate

PM - before so overseas procurement.

SB

50 min

Project Manager - Steve

1. outdated systems that the state wants to take off line & make more efficient. To keep ALDER & Asset & have them integrated into the systems.
   * Did participate in RFP but not pre-meetings

2. Comp 1 Financial — 18 months
   Comp 2 HR payroll — 15 months
   15 M
   Comp 3 Extended HR / Financial / budgeting
   10M — 12 Mon budgeting

Ass ▫ availability of resources needed
risks ▫ Resources being pulled correctly; user acceptance; overall timeline risks

3. Timelines for other states; Staffing correctly for Change Man; communication; 1 dept that doesn't want to do it → confront them & communicate w/ them

4. Selected by CedarCrestone because I have past experience managing other state projects; Been able to deliver on-time & on budget.
   - been a consultant prior
   - 10 yrs been working w/ peoplesoft.

SB

(5) Strengths of those individuals - reason why
- MaryAnn ▫ very high energy & focused
Wayne ▫ worked at prior company - well regarded
very good quality

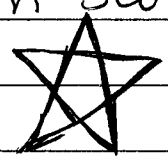
Jan ▫ Bussiness like & many yrs in chg. man
Nancy ▫ [redacted] skill set
* participated in helping select the team, but Rock, the director, selected it -
I provided input

(6)

Services = 14 million - Comp 1
11 million comp 2
5 million comp 3

Software 5 million
on-going Main 11-12 mill

TOTAL = 30 million - SVS implementation - 3 comp
w/ software & on-going main
TOtal = 47 million -



risks financially - Haven't proposed hardware in our software ▪ Cedarcrestone has the major risk;
Change of scope - would cost

* Didn't spell out the State's payment pts - but did come up w/ 27 deliverables *
Client risks ▫ don't meet the schedule - would be a risk because of maybe SVS agreements the state has w/ old systems, etc

(7) Spent a great deal of time ▫ came in several months ago"
- Some people [redacted] spent a great deal of time analyzing what the State is after. We built a great team to do it. Some [redacted] Have a good understanding of State's proposal & we have a very strong team who have done this type of WK. Feel confident

Cedarcrestone Interviews

12/3 CEDAR CRESTONE - NANCY
TRAINING LEAD

(Q1) INTEGRATED SYSTEM - SERVICE TO STATE OF ALASKA - EFFICIENCY - HR - FINANCIAL - PAYROLL - EXISTING DATA WAREHOUSE. NO MENTION OF PROCUREMENT - SEAMLESS TRANSITION -

(Q2) 5 PART STRUCTURE

1. STRATEGY - PLAN
2. CURRICULUM / MATERIAL DEV UPDATE PLANNER
3. TRAIN THE TRAINER T3 - SELECT / EDUCATE CONTENT + DELIVERY TO TRAINERS
4. EVAL OF TRAIN - DEPLOY
5. - GO FORWARD - FINAL ONGOING TRAINING PLAN

AS TRAINERS ARE TRAINED, MATERIEL IS BEING TESTED AND ADJUSTED AS NEEDED - WEB SURVEYS TO VALUE TRAINING FOR STATE EMPLOYEES FEED BACK.

ASSUMPTIONS - 18 MONTH W/ 3 MONTHS POST PRODUCTION
- AK INVOLVEMENT - ST TRAINING LEAD 3 EMPLOYEES AS LOAD TRAINING - CONTENT REVIEW

RISK - - POOR END USER ADOPTION - USE OF STATE TEAM TO ACT AS ADVOCATES
- OVERLOADED EMPLOYEE IS A SECONDARY RISK

STATE ACTION - DECIDING TO USE ELEARNING TOOLS - THE TOOL IS VERY FLEXIBLE
- COMMITMENT OF RESOURCES
- ASSIGN STATE TECH RESOURCES

T.M.

(Q3) BEEN ON SIMILAR PROJECTS - APPLY THE FLEXIBILITY OF THE TOOLS FROM PREVIOUS PROJECTS - BEEN ON BOTH SIDES

(Q4) EXPRESSED INTERESTED - HI LEVEL EXPERIENCE. BEEN ON PROJECTS THAT ARE GEOGRAPHICALLY DISERSE.

JUST IN TIME APPROACH - ABOUT 9 MONTH BEFORE GO LIVE

FALL OF 2012 GO LIVE

CEDAR CRESTONE

BPR LEAD - JON

(Q1) REPLACE AGING SYSTEMS - MAKE TRANSITION AS PAINLESS AS POSSIBLE THROUGH A SOUND CHANGE MGT PLAN.

(Q2) CHANGE MGT PLAN WOULD BE DEVELOPED IN TRAINING PHASE

BANDWIDTH CONSIDERATION - ROLE MAPPING TO VALIDATE BUSINESS USE.

→ DOES NOT SEEM TO BE ADDRESSING BPR RATHER IT SEEMS BASED ON FITTING STATE PRACTICES

- STATE WILL BE DELIVERING THE TRAINING W CONTRACTOR THERE FOR 1ST TIME
- USER ACCEPTANCE TO ONE OF LARGEST RISKS.
- MULTIPLE STATE DECISION POINTS

T.M.

(Q3) CHANGING TOOLS CAN UNDERMINE - CONDUCTING EDUCATION TO FIND OUT WHAT THEY LIKE AND MAKING SURE THEY UNDERSTAND THE "WHY"

- MUST BE THOUGHTFUL ON DEPLOYMENT
- LOOKING AT FAST STATE PROJECTS

(Q4) DOING ERP FOR 18 YRS - ON BOTH SIDES - FROM OIL & GAS INDUSTRY - LIKES WORKING IN THE DETAILS

→ BEEN AT CEDAR FOR 10 MONTHS

NOW ON 3 PROJECTS - BUT WOULD BE FULL TIME ON THIS PROJECT

CEDAR CREST INC — WAYNE

TECHNICAL LEAD

(Q1) CONSOLIDATION OF EXISTING SYSTEM - NEW TECH MODERN SYSTEM EFFICIENCY - SELF SERVICE APPLICATIONS

(Q2) INFRASTRUCTURE ASSESSMENT - MUST BE DONE EARLY -

- NETWORK CAPABILITYS - BANDWIDTH CONCERNS
- CONTINUING OPERATIONS THRU DISASTER PLAN -
- ALLOWS EARLY HARDWARE PROCUREMENT

DATA CONVERSION

- ASSUMING THEY CAN USE ALOGIC
- NOT SIMPLE, BUT DOABLE - QUALITY OF DATA IS CRITICAL

IN

T.M.

INTERFACES

- SOMETIMES INTEGRATION IS BETTER

REPORTS

VALIDATING DATA THRU REPORTS ENSURES DATA ACCURACY AND REPORT ACCURACY

CUSTOMIZATION - UNDERSTANDS STATE WANTS VANILLA TO KEEP COSTS DOWN, BUT SOME CUSTOMIZATIONS WILL BE NEEDED BASED ON STATE NEEDS

TESTING - THIS ENSURES TRANSITION

NOT INVOLVED IN PROPOSAL OR EDUCATION SESSIONS

(Q3) COUPLE OF STATEWIDE IMPLEMENTATION

- ORGANIZATIONAL CHG MGT + COMMUNICATION IS CRITICAL
- STATE OF MARYLAND
- LISTENING TO CLIENT + NOT TRYING TO GET HIS OWN WAY
- CK FOR CLEAN DATA

(Q4) VOLUNTEERED 3 YRS AGO - PERSONAL INTREST IN THIS PROJECT

1- HAS DONE STATEWIDE PROJECTS IN PAST - 6 YRS EXCLUSIVE FOCUS ON PUBLIC SECTOR PROJECT

2- BEEN TECH LEAD FROM MULTIPLE POINTS - BEEN DEVELOPER

3 YRS - ACTUALLY ORACLE EMPLOYEE

T.M

ASSUMING SUN

- 1ST TIME WORKING FOR CEDAR CRESTONE
- E-PROCUREMENT HAS INSTALLED AT CITY OF MIAMI

CEDARCRESTONE – MARYANNE

FINANCE/PROCUREMENT

(Q1) REPLACE OLD SYSTEM - SINGLE SYSTEM – STAY VANILLA WITH MINIMAL CUST. - IMPLEMENT BEST PRACTICES – TAKE ADVANTAGE OF SELF SERVICE

(Q2) PRE AWARD

DISCOVERY/ PLAN

ANALYZE/ DESIGN – FIT GAP IS done early TO ALLOW PRODUCT FAMILIARIZATION

BUILD/ CONFIG

TEST + TRAINING

DEPLOY – GO LIVE

ALL PHASES CROSS OVER

DURING PRE + DISCOVERY = LEARN AS IS - REPORT IDENTIFICATION

INTERFACES IDENTIFICATION - ID OF GAP'S

- RISK IS NOT HAVING RIGHT PEOPLE FROM STATE
- TIME IS ALSO LARGE RISK - SCHEDULE MODIFICATION TO PROVIDE ACCESS TO STATE EMPLOYEES
- COMMUNICATION IS CRITICAL
- HAVE TO MAKE SURE TECHIES KNOW WHAT TO WRITE
- MINIMAL CUSTOMIZATION
- RISIC - NOT BEING OUTSIDE BOX - IF NOT, TO MANY CUSTOMIZATIONS

T.M.

BUILD + CONFIG -

CREATE CUSTOMS

REPORTS

INTERFACES

- LACK OF STATE INVOLVEMENT IS BIG RISK

CHG IN REQTS AT THIS POINT IS MUCH MORE CHALLENGING

TEST - INTEGRATION

- USER ACCEPTANCE

TESTING IS VERY BIG RISK

= STAFF AVAILABILITY

- TEST SCRIPTS - QUALITY - BETTER TO DO "NEGATIVE" TESTING ON BAD PROCEDURES

WHAT IS NEEDED FROM DATE

-

Deploy

Rollout / POST PRODUCTION SUPPORT - 3 MONTHS

- RISK LACK OF KNOWLEDGE TRANSFER

- ENSURE STAFF ENGAGEMENT

-

(Q3) WASH DC - LARGE APPROACH - TRYING TO DO TO MUCH AT ONCE

CREATING CONFLICT FOR RESOURCES

(Q4) City of MILWAUKEE INSTALL - Knowledge of Peoplesoft current project

- LOTS OF EXPERIENCE IN ACCOUNTING - No problem traveling

- TIME IS AVAILABLE - NO ACCTING CONTINUING EDUCATION

AS PM OVERSAW PROCUREMENT INSTALL

T.M.

CEDAR CREStone – STEVE

PROJECT MANAGER

Q1 GET OFF LEGACY SYSTEM WITH LIMITATIONS TO GO TO MORE AUTOMATED SYSTEMS + PROCESSES - KEEP AUDIT + ASSET IN PLACE

GET SYSTEM ACCEPTANCE FROM USERS

NOT AT PREPROPOSAL BUT INVOLVED IN DEVELOPING PROPOSAL

Q2 3 COMPONENTS

Comp 1 - 18 months - FINANCIALS

Comp 2 - HR/PAY

Comp 3 - EXTENDED HR/FIN + Budget

BRINGING online in fall is ASSUMPTION

STAFF AVAILABILITY

Comp 1 - 3 month Discovery

RISK – MUST MAKE SURE STAFF IS AVAILABLE TO MEET SCHEDULE

18 MONTHS is Very VIABLE

– RISC Longer projects can create staff turnover

Shorter timeline CAN ACTUALLY MITIGATE RISKS

– RISC User Acceptance - STATE OF NORTH DAKOTA

Q3 TIMELINE FOR OTHER STATES

STAFFING FOR BRR Consideration

Always 1 dept that does not want to do it

STEP FORWARD AND CONFRONT RESISTENCE

T.M.

~~TOTAL 30~~

Q4 Very good past experience w/ similar size + scope - ND is quite similar. Been able to Deliver on Time + on Budget
10 yrs people soft experience

Q5 Director Selected Team with his input

Q6 Services (14 m) Comp 1 / Comp 2 (11) / Comp 3 (5m)
Software (5)
Ongoing Main (11-12)
47 million total - OK

3 component method will help w/ user adaptation
- Hosting option for implementation
- Software Hosting = Savings

Risk Financial Acct to Cedar Crestone
Not meet schedule is risk to client

Q7 Great Deal of Time - Been on Project couple of months
Strong team that has built from D. Harrup + is willing to do the real work to get it done - Knowledge w/ other states.

→ Done this for gov before, did you notice anything blatant the state missed in the interface area -

→ 170 employee match up during project

T.M.

- WHOSE STATE GOV MODEL ARE YOU LEVERAGING
- HAVE YOU PERSONALLY IMPLEMENTED THIS PROCUREMENT TOOL
- STATE E-LEARNING DEVELOPERS ?

T.M.

Cedar Crestone Interviews

Finance / Procurement Lead

Cedar Crestone: MaryAnn

① Replace admin systems, stay vanilla, take advantage of software, Best Practice, system integration, self service

② @ Pre Award
ⓑ Discovery + Plan
ⓒ Analyze + Design
ⓓ Build + Configure
ⓔ Test + Training
ⓕ Deploy

ⓐⓑ · as is
· identify reports
· interfaces
· gap identification

objective - understand our processes

risk - not right people assigned to project time for project - they do monitor to not waste time, work w/ their schedule. Don't have key resources on too many modules

communication is key

ⓒ fit gap sessions, create system, we become familiar w/ project. White spaces, work w/ technical team. Minimize customizations. They provide multiple options. 5

Risk - easy to customize

Mitigate - open to changes, think outside box

(d) create customization, build reports + interfaces
Risk - not having people involved, availability, change in requirements

(e) unit testing, integration testing, UAT (6 mos), biggest area of risk, training dev + delivery, test scripts. Quality of test scripts is risk. Mitigate by talking out + ensuring annual processes are covered.

(f) roll out + post production support (3 mos)
risk - staff can't ~~do job~~. support
mitigate - HR + Finance

(3) Wash D.C. Bis boring approach, drew on some resources.

(4) Implemented newest release of product and w/ enc acctg. Managed many projects. 12 yrs w/ cedarcrestone w/ financials. She volunteers to take GL to keep up education. Likes to travel. Would relocate here.

?s City of Milwaukee, CA, Wash D.C. more than 50% of reserve in Enc Acctg.
Will be available when project starts
Does not keep up on formal education.

time not an issue

Training Lead

Cedar Crestone : Nancy

(1) integrated system, what helps us serve the State of AK citizens, efficiencies, FIN, HR, PR, Bdgt
Seamless implementation, comfortable change
for users using ~~new~~, modern tools

(2) Strategy + logistics updated Plan deliverables
Curriculum dev making E-learning completion of mat.
Train the Trainer Selection, Education, test
Evaluation classes, feedback - web based surveys
Go Forward Plan plan dox next steps

assumptions: 18 month including 3 mos post production support
trainers here for full time
8 to 10 trainers State training lead + trainers
3 for development + content review

risk : ① poor end user adoption - start early on comm.
dept. evangelists
manage expectations
② employee overload - mitigate thru comm
+ review task assignment.
(c) state participation, invest + support E-learning
tool, bandwidth - tool is flexible
need I tech resource

(3) 2 projects w/ similar logistical challenges
use TB + ETraining to resolve

Was State of Maryland empl. for 7 yrs.

(4) She expressed interest, lots of exp w/ E learning tool, been on projects w/ geographical issues and on some that is not (they are very different)

?'s Just in time training approach.
Lesson/SME's - at 9 mos before go live. Then comm w/ end users before training begins
Training 4 wks before go live. ~~Fall 2012~~
Fall of 2012

Go forward plan:
E-learning tool, releases? anew?
how to identify + train new users, how often
how to handle enhancement training.
State will own E learning tool. Will have pre-built lessons for future add ons.

Time not an issue.
Very good.

Technical Lead

Cedar Crestone: Wayne

① Consolidation of legacy systems to modern system, access to data, check patterns, better reporting, employee/vendor self service.

② infrastructure assessment - early, issues w/ bandwidth, contemplation of operations for disasters, fail over site, hardware procurement

data conversion - assumption to use ALDER, + data from other systems if necessary, data cleansing central part of good conversion

interfaces - ASSET, ALDER, other shadow systems, determine if they are integrations

Reports - key process

Customizations - desire to be as vanilla as possible. Sometimes can't configure to accomodate

Testing - integrated testing

decisions - how much history to convert

high level buy-ins for vanilla process

not involved in writing RFP. Was not in educational mtgs. Currently involved in project - go live

(3). Has done several stud implementations
Good communication strategies resulted in good technical req + user readiness
- Listen to client (don't insist on doing it his way)
- Check your data (make sure it is clean)

(4) He volunteered 3 yrs ago. Kept up w/ State's involvement. Has done stud in past.
Last 6 yrs exclusive in public sector.
Has been tech. lead as developer, tech mgr, + project manager.

?'s w/ Oracle w/ 3 yrs.
Peoplesoft 15 yrs.
Sun as hardware. Need to do infrastructure assessment (knows we already have some SUN).
Not yet worked for Cedar Crestone. Has worked for Steven before, knows / has worked w/ several people on team.
Installed Eprocure at Miami/Dade ~~County~~ City.

Short on time

Seems light weight.

BPR

Cedar Crestone: Jan

① Replace old systems, transition painlessly, solid CM to help.

② training strategy - CM communication plan
Pre-award: band with, training facilities. how much of blended solution, role mapping + responsibilities
Mat. Dev - curriculum - Etool
Train the trainer - select the right person, adult learning skills, review in pilot like setting
Train Delivery - State train w vendor support
Post Production Support.

Risk - involvement from user community why they are being trained
(c) validation from State on above bullet points

③ (a) Employee competency level changes - creates fear. Diplomacy goes a long way. Determine what they liked on as is process and what they fear about to be process
(b) Be thoughtful in deploy info to remote locations. Look at lessons learned from past State projects

(4) 18 yrs exp. Was employee in large Oil + Gas firm that converted.
Focused on adult responses. Has team building skills, likes fun on project, is very structured. Need constant communication. BPR is important (don't automate bad process) Looks at details. Wants to work w/ people.

?'s

10 mos w/ company
Deloitte - CM lead for Visa - Worldwide
Change agent network across countries

6 people from Cedar for training + BPR
currently PM ~~for~~ for 3 projects
Will be full time on this project

Short time
not in depth, too blended w/ training

46.8 m Project Mgr.

Cedar crestone: Steve

(1) off of legacy systems AKSAS/AKPAY, outdated technology, more automated integrated processes, add procurement, AIDER + ASSET keep + integrate into ERP, bring users into system and accepting

(2) 18 mos - component 1 Fin

15 mos - component 2 HR Payroll

10/12 mos - component 3 Extended HR + Fin, Budget

start at same time not including pre-award

assumptions: availability of resources

mos 1-6 analysis design

mos 7-12 config + dev.

mos 13-18 testing

Go Live

assumptions: using resources causes strain on existing staff. More off site. 18 mos is viable.

prevents fatigue + turnover

risks/mitigation:

18 mos is mitigation

user acceptance, depts not going w/ plan

came in w/ healthy CM/BPR team

need communication

risk of timeline

additional hrs built into RFP

(3) Timelines from other states

Staffing - not enough resources allocated to CM

need to confront depts not accepting change

(4) Selected by Cedar Crestone, has managed states of similar population size (N Dakota). Visibility to project is huge Small towns. Delivers on time + in budget. Worked as consultant on procurement. Worked w/ People soft 10 yrs in Public Sector Understands product, good bases of business processes

(5) Strength of individuals - Mary Ann Crestone focus, high energy
Wayne - State project tech lead, was well regarded + quality work
Jan - Business like, great sense of humor. Many yrs doing well as software agnostic.
Nancy - training skill sets, unique ways of using E Learning tool

(6) Participated in selecting team
services 14 m compl 11 m 2 5 m 3 = 30 in.
Software 5 m
mtnce 12 m
47 m.

risks - option to host implementation or host software
myer risks financially to Cedar Crestone
Change in scope - reduce or increase
additional resources
" functions
Pre award allows good dialog + scope determinations
Payment points not yet determined by deliverables
Do in Preaward
Risks to client - Is the State getting system that supports State's needs

They don't meet schedule is financial risk to State as unable to decommission legacy systems
Agencies have to back fill positions
If we don't go hosted, retirement impacts IT staffing, they don't want to cross over
Price not based on users until after 10 yrs mtnce then based on users or budget.

(7) Spent great deal of time (over a year) gathering knowledge. Put together strong team that built proposal from ground up.
Good understanding of proposal.
Lessons learned from other States.
Confident they can provide what we need.

?'s

Use discovery to see if we missed any interfaces/systems. Did not notice any missing ones in RFP.
flexible use hrs for unidentified items

Need full time resources cedar state one to one

time - ran full
seemed weak in delivery style

Interviews
CedarCrestone

Can give 2-15?

Spencer, Danial R (DPS)

From: Spencer, Danial R (DPS)
Sent: Wednesday, December 01, 2010 1:15 PM
To: Spencer, Danial R (DPS)
Subject: PEC 12-3-10

Blue (CedarCrestone)

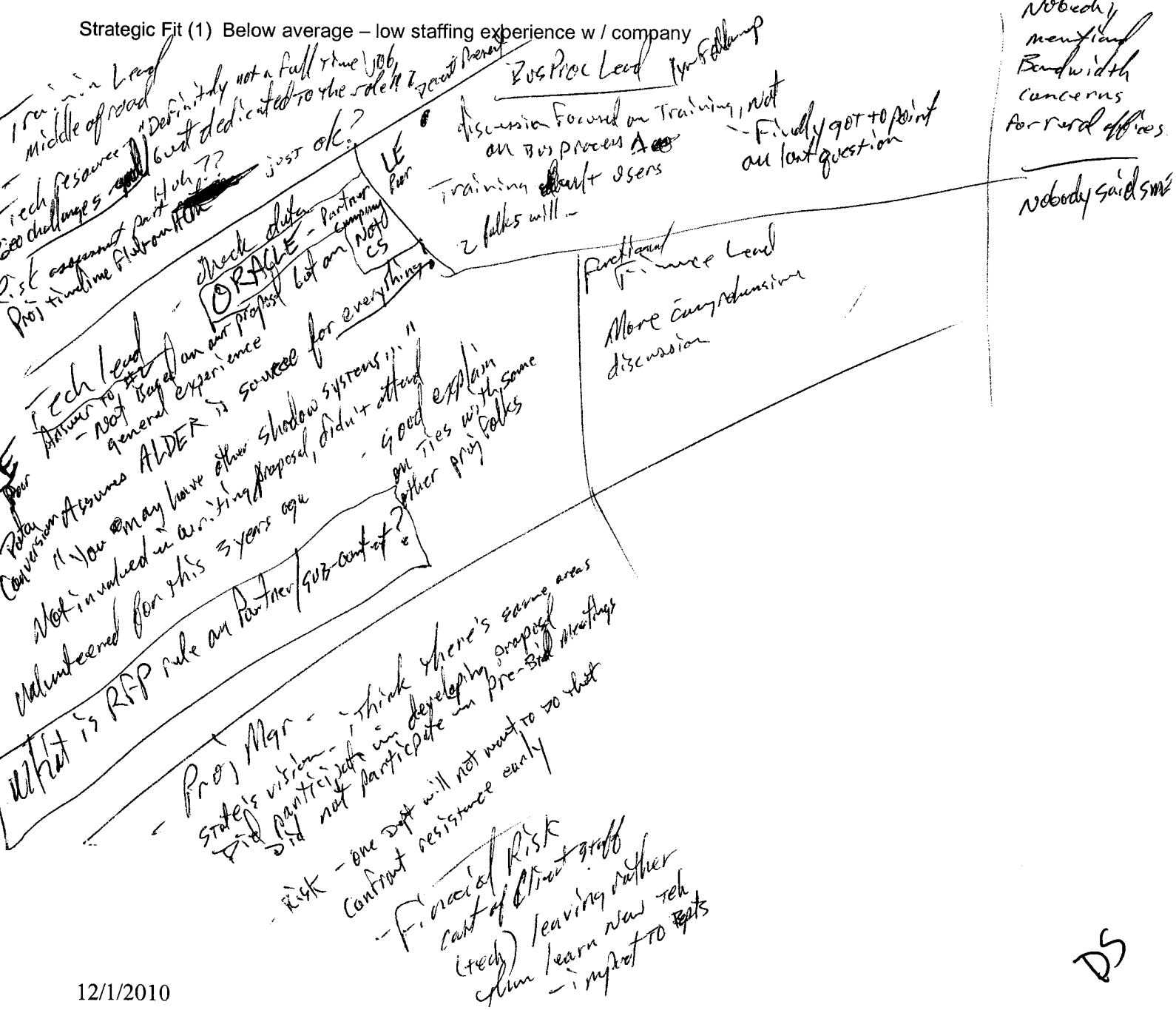
Demo (5)

Workplan (5)

Risk Assessment (5)

Value Added (5)

Strategic Fit (1) Below average – low staffing experience w / company



12/1/2010

DS

Cedar Crestone

Blue

#1 11/3/10 2pm - 4pm

City of Milwaukee, WI - 7200 EE's $1.2 B Op Bud

Live w/ PeopleSoft - ORACLE since 1999 - has had multi upgrades

Transitioned to #1 offerer hosting peopleSoft hosting in 2003 - 8 yrs

★ financial: Invoice citizen, track receivable, receive $, post $ + liquidate RC

Payment Predictor tracks receivable

Create invoice → overnight process creates RC

Select Cust → Enter Invoice Info → finalize Inv → Track → Review

Automated, improved collections, improved year-end recon.

520 financial module users 50-60+ at once

★ Procurement: Create requisition - approval (Track) - create PO - approval (Track PO) / payment

Budget check - checks for available funds

pre-encumbers automatically

Requisition goes to purchasing dept to solicit vendors

'temporary estimate'

Once vendor + quote is final → initiate PO

final EN - transfers from pre-encumbrance to real EN

Issue PO → receive product → receive invoice / voucher → track payment process

'legal obligation'

voucher can copy info (accounts) from PO

Positive Pay

★ HR / Payroll

Create position - candidate selection - new hire info

workflow notification - Emp self service

City of Mill does not use for recruiting → Candidate selection

separate Time entry system - interfaces w/ payroll system - interfaces w/ financial system

Single source

Confirmation statements to EE's

Minimize Data entry

reduce errors

Cedar Crestone

Training Lead - Nancy

① State vision/goals - integrated system to better serve state residence - keep new system increase efficiency

② Milestone activities
5 parts ① Strategies/logistics ② Curriculum development ③ materials ③ Train + trainers
④ Evaluation/Deployment ⑤ Go forward
e-learning tools
Assumptions - 18 month plan
- State EE involvement
Risks - Poor enduser adoption - early involvement
actions - overload - manage expectation
State Support/involvement of State - resources

③ lessons learned - logistical challenges
elearning - been state employee (Maryland)

④ Selection - interested / experienced w/ elearning experience w/ geographic challanges

Justin Time / fall 2012

Go forward plan - maint / documentation
new users in future / new release timing

Cedar Crestone

BPR Lead - Jan

① State vision/goals - replace old systems painless as possible - solid chg mgmt plan

② Milestone activities

① Training Strategy / Chg mgmt comm plan
Curriculum/Material development
Train the trainer
Training Delivery
Post Production Support

① Training facilities / bandwidth, Role mapping job analysis

② eLearning / instructor lead / State reviews materials for validity

③ Train the trainer - adult learning skills

④ Training delivery - state delivers / vendor there 1st or

③ lessons learned - user acceptance / diplomacy communication / fears keep users informed Geographic locations - look at SOA previous pj lessons learned

④ Selection - 18 yrs exp been on the other side / knows fears - adult learning facilitative

Cedar Crestone

Technical Lead - Wayne

① State vision / goals - consolidate old legacy system to enterprise system / improve business process / performance

② Milestone activities
- Infrastructure assesment - early
- Data Conversion (CALDER)
- Interfaces / Integrations
- Reports
- Customizations / minimal impact
- Data Testing

③ Lessons learned - importance of change mgmt
Communication strategies - know as much as you can as early as possible / listen to client
- Check data cleanliness

④ Selection - volunteered / experience w/ statewide government (public sector) experience
works for Oracle - not cedar Crestone (partner)
has not worked w/ Cedar Crestone, but has w/ individuals

mk

Finance/Procurement Lead - MaryAnn

① State vision/goals - Replace admin system to ERP solution - Vanilla/ improve business process / system integration / self service

② Milestone activities
Pre award - As-is, identify reports / interfaces / gaps
Discovery / Plan - right resources / time
Analyze / Design - To-be / fit-gap
Build / configure
Test / Training
Deploy - rollout / post production support
Open line of communication / State resources
Eager to customize - minimize - be ready to chg processes - outside the box
involvement from users critical / quality testing
knowledge transfer

③ lessons learned - DC big bang all at once phased approach is best - resources become limited

④ selection - city of Milwaukee - newest software encumbrance accounting / 12 yrs exp w/ financials likes to travel - relocate

Cedar Crestone

Project Manager - Steve

① State vision/goals - replace old systems
more automated integrated processes
keep newer systems to integrate w/new system
user buy in

② ~~Mile~~ milestone activities - 3 components
18mo 1 financials
15mo 2 HR/Payroll
12mo 3 Extend HR + financial / Budget
Assumptions - ~~proper~~ sufficient state resources / communication
Risks - aggresive timeline / user acceptance

③ Lessons learned - timelines / comparing to similar projects, change mgmt staffing / effort / open communication

④ Selection - past exp managing projects of similar size - high visibility, work w/ peoplesoft 10yrs
Understands product, business processes

⑤ Team selection - strong experience, talked about each individual, participated in selection

⑥ Financial proposal Services implementation
14 mill - financial, 11 mill HR/Payroll, 5mill Budget
software - 5 mill, 12 mill maint $47 mill Total

Financial Risks - scope chg may increase cost
additional resources needed from CedarCrestone
meet scheduled timelines
27 deliverables - payment points negotiated
lump sum price - not based on # of users

⑦ accuracy - spent significant time researching
and analysing AK needs / strong team
prior exp w/other states and lessons learned

Interviews 46.8 mil ①

CedarCrestone - Training Lead Nancy

1) Integrated system to serve AK
Citizens
Financial / HR
Keep ALDER
Seamless implementation

2) Strategy
- plan

Curriculum Dev - T^3 Plan
Material Dev
- Updated Plan
- Training Mat

- Selection
- Content & Delivery
- Test Trng Matl

Go Live
Fall of 2012

Deploy + Eval
- Classes
- Feedback
- Completion

Go Forward
- Plan

Assumptions
- 18 mos - 3 mos of Post Prod Support here entire time
- AK Involvement - lead + trainers
  3 people avail as lead trainers
  Content review

Risks
- End User adoption - start early + communicate
- Overloaded -

Actions / Decisions
- Invest in + support e-learning tool
- Commitment of resources
  8-10 trainers
  3 content review
  Tech resource for e-learning tool

3) 2 proj w/ sim logistical challenges
has been State employee - 7yrs end user

4) Expressed interest - company solicited interest - exp w/ the tool + State govt - experience w/ logistical challenges

E-learning tool - cost included in proposal

MH

Cedar Crestone

BPR Lead - Jan

1. Replace aging systems
   Make it as painless as possible using good CM

2) Training Strat + CM Process
   Curric/Mtl Dev
   T³ - adult learning styles
   Training Delivery -
   Post Prod Support -

Risks - end users not knowing why they're going to training

3) Lessons learned -
   Work through end-user fear
   Communicate early + often
   Will need to be thoughtful about - look@ our past projects

4) 18 yrs experience
   Worked for O+G company during an implementation
   Sincerity
   Team Building
   Likes process detail
   Loves CM

Finishing other projects would be full time on ours

mt

Cedar Crestone
Wayne
Tech Lead

1) Consolidation of legacy systems
Better access to data

2) Infrastructure Assessment
Network
COOP Plan
Proc of Hardware

Data Conversion
ALDER as source
Data Cleansing
Critical Piece

Interfaces

Reports

Customizations

Testing

Decisions - how much data in ERP system

Works for Oracle

PeopleSoft - 15 years
• Can run on several platforms

Has worked w/ people in Cedar Crestone but not w/ the company

Has installed e-proc @ City of Miami

3) Tech lead @ State of Delaware
CM & Communications are critical
Listen to client - not do things against culture of client
Check + re-check data + cleanliness

4) Volunteered for this project
Personally interested in it
Statewide implementations
Last 6 years pub sector focus
Has been developer, tech lead and a PM

MK

CedarCrestone

(4)

Fin/Proc
MaryAnn

1) Replace admin systems
As vanilla as possible
Improve bus processes
Take advantage of self-service tools

2)

each phase 6 mos

Pre-Awd Plan + Discovery

- Understand As-is
- Reports
- Interfaces
- Gaps

State Dec-making Communications

Assume - state involvement
Risk - wrong people time

Analyze + Design

- Fit/Gap
- Write Specs
- Work w/Techies

Risk - too eager to customize
State be open to new BP ideas

Build/Config

- Creating Custom Reports
- Interfaces

Risk - availability of staff
Minimize Changes

Test/Train

- UAT - 6 mos
- Quality of ~~test~~ scripts

Deploy

- Rollout
- Post Prod Spt 3 mos

Risk - ~~state~~ not ready to takeover

3) Wash. DC - tech resources spread too thin -

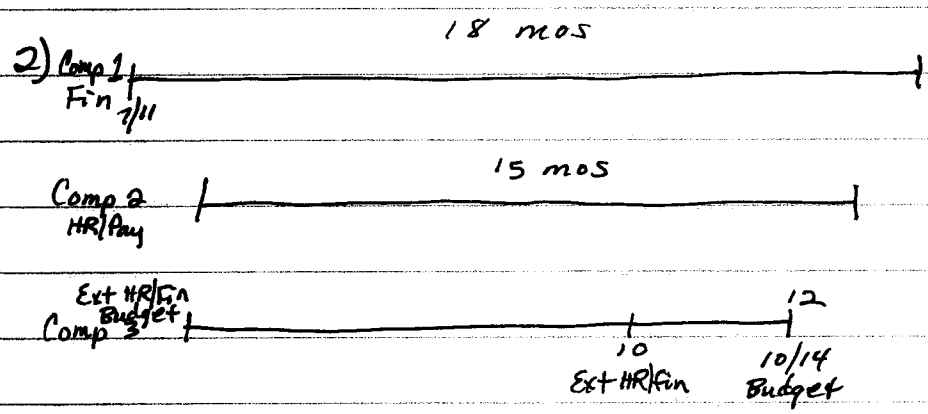
4) Involved in City of Milwaukee - Encumbrance acctng background
~~Exp~~ Knowledge of newest version
No problem traveling
Would be here

Oversaw Proc Implementation @ Milw
not personally involved

MX

PM – Steve

1) Get off legacy systems
Decommission outdated tech
More integration
ALDER & ASSET
involved in dev of proposal



Avail of Resources
Mit by ext Comp 1 to 18 mos
~~User Acceptance~~
Resistance to change
~~Good~~ CM & BPR

3) Appropriate timeline
Good CM & Communication
Confront resistance up front

4) Exp on sim proj — Bus Proc exp
State of ND — 10 yrs Pub Sector w/ CedarCrestone
Exp in "small town"
Procurement, Workflow, Proj Cost

5) Mary Ann – cust focus
Wayne – quality work
Jan – prof, but sense of humor
Nancy – training exp

Steve participated in selecting team Dir made final decision

mk

Svcs

PM Cont

6) 14 mill - ~~Comp 1 Svcs~~ — 5 mill - Software
11 mill - Comp 2 — 12 mill - maint
5 mill - Comp 3 — 47 mill Total

30 mill - total svs

Fin Risks - Hardware not included
Hosting is an option

Payment pts will be defined during pre-award

Risk to Client - if schedule slips - State could need to maintain legacy systems longer

Retirement of key state staff

No affect on current pricing if users change.

7) Put together a good team -
Good understanding
Exp + lessons learned from other projects

Missing Interfaces?
Didn't see any - but would identify during discovery

There is some contingency that could cover addl interfaces.

State Resources needed? 1 to 1 C'tor & State
Full time

mtt