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Perfection or Completion: Managing Greenfield R12 Implementation

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Agenda



- **Objectives**
- **Greenfield Projects**
- **Project Management Lifecycle**
- **Initiation & Planning**
 - **Scope**
 - **Plan**
 - **Governance**
 - **Toolkit & Methodology**
 - **Center of Excellence**
- **Conclusion**



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Objectives

- Discuss Greenfield Projects & Challenges
- Project Management life cycle
- Crucial steps in Initiation & Planning
- Key Considerations for Managing scope, Project Planning, Governance, Implementation Methodology and setting up Center of Excellence
- Lessons Learnt
- Q&A



Survey

Role

- Executives
- Project/Program Manager
- Technology Manager
- Delivery Team
- Others

Project Experience

- Oracle
- Other ERPs
- Upgrade
- Re-implementation
- Greenfield

Objectives

- Discuss Challenges
- Learn Pre-planning of implementation
- Share Project Management Experiences
- Unanswered questions
- R12?



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What is a Greenfield Project?



- Project lacking any constraint
- No prior Oracle history
- E.g. New business; New Geography/Plant implementing Oracle
- Rare as most projects are either Upgrade or re-implementation or may have some ERP system (called 'Brownfield')



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Key Advantages of a Greenfield Project?



- Business processes can be standardized as per Oracle EBS offerings and industry practices
- Customizations can be minimized
- Oracle EBS configurations, e.g. Chart of Accounts, can be designed to best suit the current and future needs
- Data conversions may not be there or could be minimal
- System adoptability can be higher



Challenges of a Greenfield Project

- Projects have a high risk as 'Plan B' of using existing system & processes may not be an option
- Process design may focus on 'Perfection' instead of 'Completion'
- System design may have a common theme – 'Flexibility' for future modifications
- Analysis and Process design may take longer than expected
- Multiple and Unplanned Conference Room Pilots may be required
- Signoff on and Locking design may not be possible



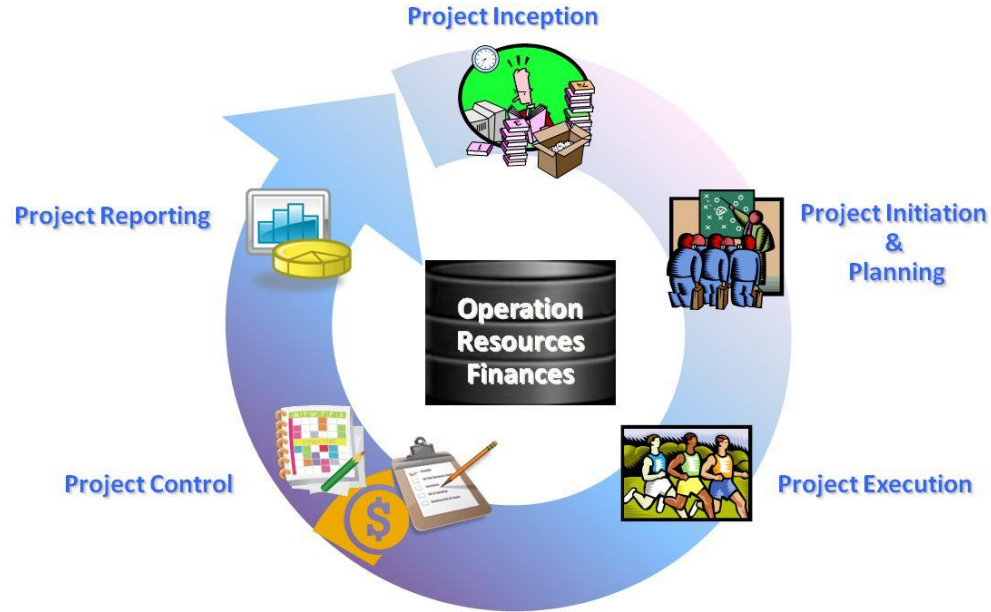
Challenges of a Greenfield Project

- Technical work, if any, may have a delayed start and may constantly be in flux
- Project and/or User roles not fully defined until late in the project
- Extensive communication planning required
- Multiple and Iterative training is required at different levels of users
- Often go-live dates are firm & not negotiable and hinges on numerous other factors
- Post implementation support can be painful and longer because of 'teething' problems



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Project Management life cycle



Pre-Planning a Greenfield Project is the most important task



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Project Inception Priorities





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Scope

- Oracle R12 offers 300+ applications with new additions every day
- Each application has numerous features with typical usage less than 30% industry wide
- Project may need CEMLI's – Configuration/Customization, Extension, Modification, Localization, and Integration
- Oracle R12 does offer many out of the box reports – averaging around 50+ per application. Project may need more.



Scope - Considerations

- Is the scope detailed enough in statement of work?
- Have we spelled out all R12 applications and key features in scope?
- Have we mentioned all integrations in scope? Are all data conversions listed? Budget for new reports mentioned clearly?
- Is the acceptance criteria for each scope item clearly mentioned
- Is there any ambiguity in any scope related statements?
- If scope details are unsatisfactory, can we consider commissioning an assessment, with a smaller team, to finalize scope?



Scope - Considerations

- Can we defer implementation of specific applications specially if they require complex constant maintenance and may provide less value now? E.g. Implementation of Oracle Incentive Compensation application may be deferred if in your growing Organization incentive plan isn't structured yet.
- Do we really need third party self service applications, like iReceivables, iSupplier early on?
- Can Oracle solutions fit all products we are selling or about to sell?
- Is the process of handling changes to scope well defined? Should have criteria for prioritizing, documenting impact assessment with appropriate approval.



Project Plan

- Oracle Implementation Methodology (OUM) comes with sample plan
- Besides Work Plan/Gantt chart, will need subsidiary plans:
 - Resource Plan
 - Quality Plan
 - Risk Plan
 - Communication Plan
 - Training plan
 - Go-live plan
 - Support plan



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Project Plan – Key Considerations

- Are the milestones clearly defined in the plan and agreed upon?
- Is the budgeted time for requirement analysis and mapping & gapping exercises sufficient enough based on the scope? Focus on business processes and requirements first.
- Are we doing right number of conference room pilots?
- Have we planned finishing certain key decisions early on the project? E.g., Multi-Organization structure, Key flexfields like Chart of Accounts, Item Master, Territories etc.
- Is the resource loading aligned correctly? Shouldn't technical resources come at later part of the project?



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Project Plan – Key Considerations

- Is the project phasing and/or pilot go-live considered before the project start?
- Have the key risks identified early on? Mitigation plan?
- Has the training started before the project starts? Have the key super users completed R12 boot camp yet?
- Is the communication plan in place?



Governance

- ‘Stakeholders should be committed’. Are stakeholders really committed on ‘Completion’?
- Are the key roles for the project fully identified?
- Has the training needs for resources identified? Has the training plan implemented?
- Are the resources briefed on implementation methodology if not aware of?
- Have the key resources read the project charter, goals, SOW?
- Has the process for monitoring team performance finalized?
- Are the resources for post-implementation support identified?



Governance

- Project Org chart is important
- Are the key resources (both customer and integrator) identified? If not 100% available, is the percentage of requirement at various stages of the project spelled out?
- Is delivery teams compensation aligned with project completion and goals achievement?

Subject Area/Expertise	Time Commitment	Comments
Primary area of expertise	Approximate time commitment required from the SME during the duration of the project. Note that this requirement could increase or decrease during various stages of the project	Any clarifying comments
Opportunity to Cash Process Expert	75-80%	SME with understanding of product offerings and processes. Ability to map to-be processes. Responsible for coordinating with other SMEs and providing unified requirements. Also responsible for determining data migration business rules and strategy.
Incentive Compensation specialist	25%	
Billing Specialist	50-60%	Expertise in billing, invoicing and revenue recognition processes
Sales Specialist	50-60%	Expertise in Opportunity Management, Lead management, Quoting, Sales Hierarchy and reporting
Product Specialist	30-40%	Knowledge of product offerings and pricing
Customer Service Specialist	30-40%	Knowledge of customer service issues and processes
Production Specialist	30-40%	Knowledge of production and fulfillment processes



Methodology

- Oracle Business Accelerator
 - For small and mid-size growing organizations in different industry verticals
 - Rapid Implementation
 - It comes with industry standard business flows and toolkits
 - Can reduce implementation discovery, setup, and testing project phases but has its own constraints and challenges.
 - For Greenfield implementations, Business Flows can give you a jump start on the implementation but rest of the toolkit should be re-considered.



Methodology

- Oracle Unified Method (OUM)
 - Encompass Oracle traditional Application Implementation Methodology (AIM)
 - Supports Application Implementation projects, Software Upgrade projects, Business Intelligence and Enterprise Performance Management and deep support for Service-Oriented Architecture (SOA), Enterprise Integration, and Custom Software.
 - Comes with ready-made templates, guidelines, and scalable work breakdown structure.



Methodology

- OUM offers about 200+ deliverable templates. Note some of these can also multiply by each application implemented.
- Not all are required in any given project
- Doesn't come pre-filled for specific application



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Methodology – Key Deliverables

Doc ID	Description	OUM Focus Area
RD030	Develop Current Process Model	Business Requirements (RD)
RD011	Develop Future Process Model	Business Requirements (RD)
RD045	Prioritize Requirements (MoSCoW)	Business Requirements (RD)
TE010	Testing Strategy	Testing (TE)
TA020	Technical Architecture Requirement and Strategy	Technical Architecture (TA)
CV020	Data Acquisition, Conversion and Data quality strategy	Data Acquisition and Conversion (CV)
TR010	Training Strategy	Training (TR)
CV040	Conversion Component Design	Data Acquisition and Conversion (CV)
AN100	Analysis Specification	Analysis (AN)
DS140	Design Specification	Design (DS)
TE010	Testing Strategy	Testing (TE)
TE020	Unit test scripts	Testing (TE)
TE035	Integration test scripts	Testing (TE)
TE040	Integration test	Testing (TE)
TE120	User Acceptance test	Testing (TE)
DS030	System Configuration	Design (DS)
DO070	Publish User Guide	Documentation (DO)
TS020	Cutover Strategy	Transition (TS)

Key deliverables from OUM's 200+ deliverables



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Center of Excellence



‘Getting to the summit is optional,
getting down is mandatory’

Ed Viesturs



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Center of Excellence



- Commitment to Oracle is much beyond go-live
- Greenfield projects require longer time in stabilization varying from a month to few quarters
- Oracle Support (Metalink) is purely for software technical support
- Formulate in-house Center of Excellence early on



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Center of Excellence



- Has the support strategy formulated even before the project is complete?
- Are the service level agreement identified?
- Has the support team identified?
- Have the post-implementation performance measurement metrics been defined?
- Has the support and escalation process communicated to the user base before go-live?



Conclusion

- Greenfield projects have a high risk as 'Plan B' of using existing system & processes may not be an option. **A: Proper risk planning should be documented early enough with mitigation plan.**
- Process design may focus on 'Perfection' instead of 'Completion'. **A: When doing the requirement analysis capture requirement metrics (Volume, \$ value, timeline if future) and prioritize requirements by preparing RD045 MoSCoW List.**
- System design may have a common theme – 'Flexibility' for future modifications. **A. Fortunately R12, unlike its predecessor 11i, is much more flexible. Even Key Flexfields like Chart of Accounts can be updated on live environment now. R12 comes with features of personalizations. Capture during requirement analysis where flexibility is more critical**



Conclusion

- Analysis and Process design may take longer than expected. A: Work plan should budget accordingly
- Multiple and Iterative Conference Room Pilots are a must. A: Work plan should budget accordingly
- Signoff on and Locking design may not be possible. A: Statement of Work should mention acceptance criteria and appropriate escalation
- Technical work, if any, may have a delayed start and may constantly be in flux. A: Work plan in conjunction with Resource plan should be planned accordingly. Acceptance criteria on design documents should be followed.
- Extensive communication planning required. A: Communication plan should be formulated before project begins. Regular Stakeholders/Team meetings a must



Conclusion

- Multiple and Iterative training is required at different levels of users. A: Recommend R12 boot camp for key super users if not already trained. Training plan should address SME, super user and end user training
- Often go-live dates are firm & not negotiable and hinges on numerous other factors – e.g. Launch of a new product in a new geography; Opening a new manufacturing plant. A: Detailed cutover plan. Consider pilot go-live early on if feasible.
- Post implementation support can be painful and longer because of ‘teething’ problems. A: Create a support plan and in-house Center of Excellence early on. Oracle Support is purely for software technical issues and implementation.