

Valerie A. Lee

11/20/2009

***End to End RFP Process Efficiency Review***  
**Project Plan**

**KP's Front Door**

Tools & Resources for Program and Project Managers



# Milestones & Deliverables

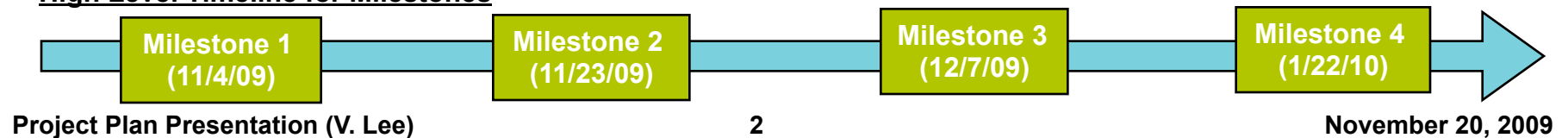
## Key Milestones

1. Frame benefits and problem
2. Define project
3. Define decision-making roles
4. Agree on Engagement Letter (**Milestone 1**)
5. Create realistic, achievable plan
6. Conduct interviews
7. 2009 Renewal Season Debriefing meeting
8. Finalize Project Plan (**Milestone 2**)
9. Draft 2 – 3 process improvement tools (**Milestone 3**)
10. Draft 2 – 3 training/communication tools (**Milestone 3**)
11. Perform a “dry run” of proposed process improvement changes
12. Obtain stakeholder buy-in of new processes
13. Incorporate process improvement changes into our department processes
14. Conduct Project Evaluation Survey (**Milestone 4**)
15. Capture lessons learned

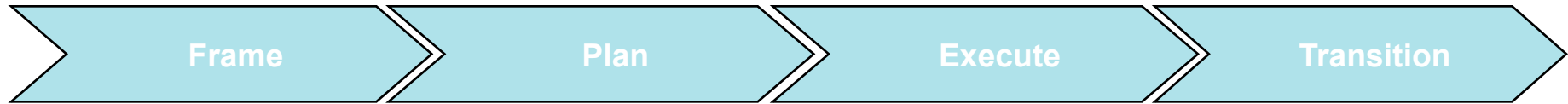
## Key Deliverables Associated With Each Milestone

1. Engagement Letter
2. Final Project Plan
3. 2 – 3 new tools/process improvements
4. 2 – 3 new training/communication tools
5. Incorporate new/improved processes in training manual, training plan, and communication plan
6. Project Evaluation Survey

## High Level Timeline for Milestones

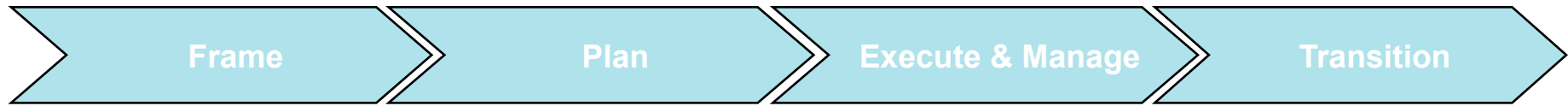


# Key Work Streams



Work Streams	10/26 – 11/3	11/4 – 11/20	11/23 – 11/30	12/1 – 12/7	12/8 – 12/15	12/16 – 12/28	1/6 – 1/13	1/14 – 1/22
1. Obtain feedback from QA Project Team and management team	█							
2. Prioritization of possible areas of focus		█						
3. Develop process improvement tools			█	█				
4. Refine each process improvement tool and perform “dry run”					█	█		
5. Integrate new processes in other proposal development workflows and conduct Project Evaluation Survey							█	█

# Key Activities & Deliverables



Frame	Plan	Execute & Manage	Transition
<p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>Define benefits to KP</li> <li>Articulate problem to be solved</li> <li>Define project scope and approach</li> <li>Identify key goals, milestones and deliverables</li> <li>Form QA project team</li> <li>Kickoff Prep Meeting</li> <li>Discuss roles, project structure, responsibilities, assumptions and expectations</li> <li>Ensure sponsor and team buy-in</li> <li>Agree on Engagement Letter</li> </ul>	<ul style="list-style-type: none"> <li>Create realistic, achievable plan</li> <li>Secure required resources</li> <li>Research and analysis</li> <li>Conduct interviews</li> <li>Obtain feedback from QA Project team and management team</li> <li>Prioritize possible areas of focus</li> <li>Finalize Project Plan</li> <li>Sponsor approves Final Project Plan</li> </ul>	<ul style="list-style-type: none"> <li>Monitor and control actual progress against Project Plan</li> <li>Manage required resources</li> <li>Draft 2 – 3 process improvement tools</li> <li>Draft 2 – 3 training/ communication tools</li> <li>Refine process improvement and training/ communication tools</li> <li>Produce final versions of process improvement and training/ communication tools</li> <li>Perform a “dry run” of proposed process improvement changes</li> </ul>	<ul style="list-style-type: none"> <li>Incorporate process improvement changes into our department processes</li> <li>Close the project</li> <li>Release project resources</li> <li>Conduct evaluation</li> <li>Capture lessons learned</li> </ul>
<p><b>Deliverable(s):</b></p> <ul style="list-style-type: none"> <li>Engagement Letter</li> </ul>	<ul style="list-style-type: none"> <li>Project Plan</li> </ul>	<ul style="list-style-type: none"> <li>2 – 3 Process Improvement Tools</li> <li>2 – 3 Training/ Communication Tools</li> </ul>	<ul style="list-style-type: none"> <li>Project Evaluation Survey</li> </ul>

**Approximate Timing**



Project Plan Presentation (V. Lee)

November 20, 2009

## Initials

EM  
ZV  
JS  
CS  
SS  
LS  
JK  
RR

## Name - Role

- Eric Mitchell – Team Lead
- Zach Vardanian – NA NCAL
- James Sun – NA NCAL
- Caroline Stoker – CA SCAL
- Stacy Sebasty – CA SCAL
- Lisa Sarmiento – CA NCAL
- Joanna Kim – Proposal Development
- Rich Rodriguez – PMAPS