# The BluMarble Methodology

- A cutting-edge approach with processes and tools developed specifically for maximizing success in the design, implementation and roll out of EPM projects

- Created by BluMarble personnel based on our experience and best practices from **WHAT** to do across many successful EPM projects

- AND **WHAT NOT** to do!

- Provides our clients with a project roadmap and sets clear expectations

- Minimizes risk in scoping, developing and delivering EPM projects

- Focuses on knowledge transfer and client self-sufficiency

1: Inception   **2: Implementation**   **3: Production**
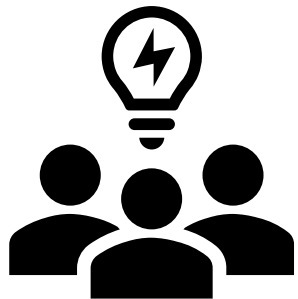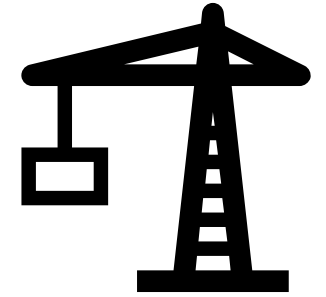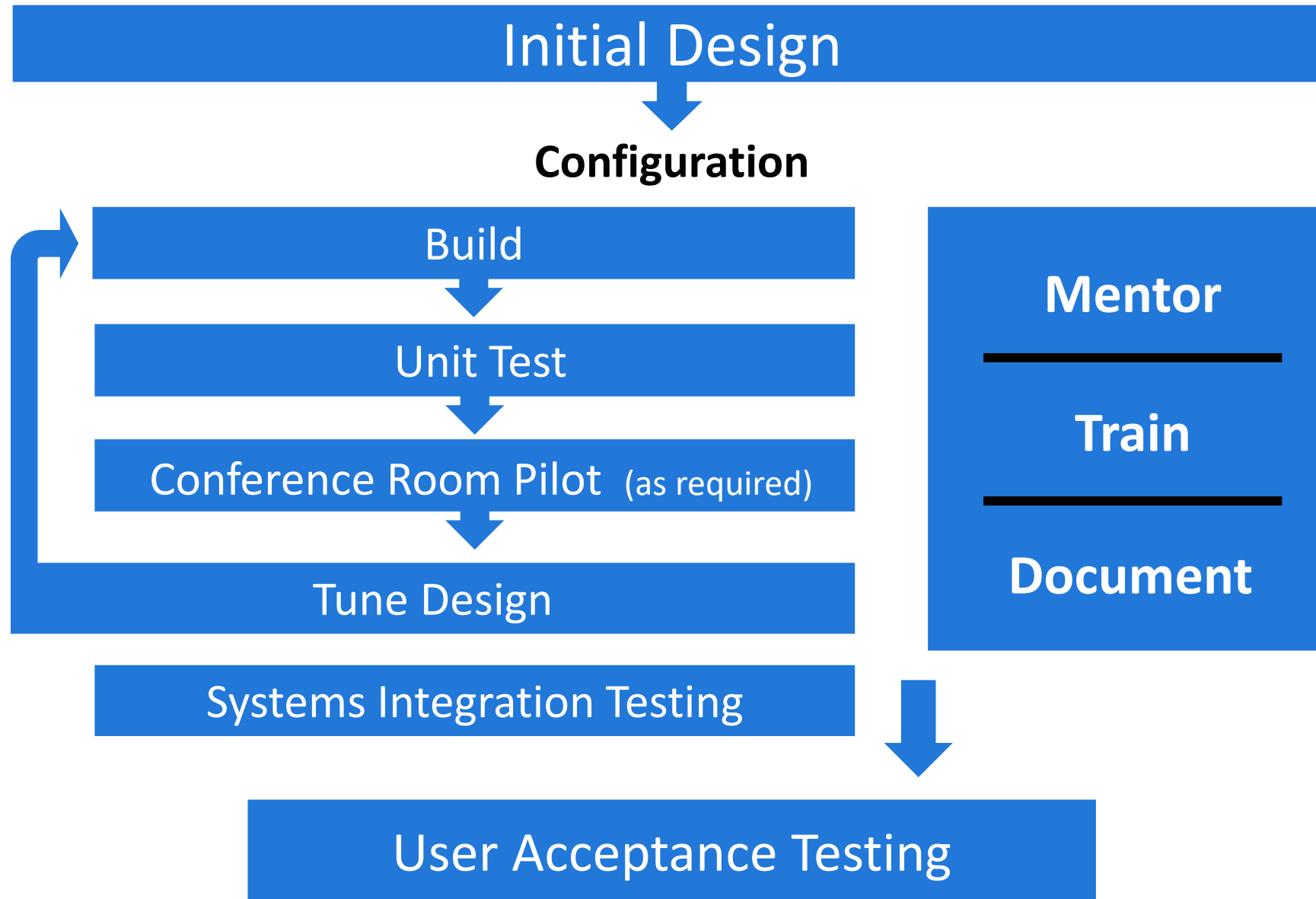
blu|marble
MANAGEMENT GROUP

Considerations

- **Establish project team and responsibilities**
- **Understand scope and project objectives**
- **Is a Proof of Concept desired?**
  - **If so, establish Proof Points**
  - **Develop proofs to address the established proof points**
- **Detailed Requirements Analysis**
  - **with all stakeholders**
  - **fit / gap analysis**
- **Business process review**
  - **with all stakeholders**
- **Determine what Cloud environments are required**

Deliverables

- **Small initial Statement of Work (SOW) to cover phase 1**
- **If appropriate, negotiate Master Services Agreement (MSA)**
- **Project Charter**
- **Proof of Concept model (if requested and contracted for by client) and POC Guide**
- **Requirements workshops**
- **Detailed requirements document**
- **Business Process recommendations document**
- **Detailed Implementation Project Plan**
- **Implementation Statement of Work (SOW)**
- **Configured Oracle environments**

blu|marble
MANAGEMENT GROUP

Phase 2: Implementation

Initial Design

Configuration

Build

Unit Test

Conference Room Pilot (as required)

Tune Design

Systems Integration Testing

User Acceptance Testing

Mentor
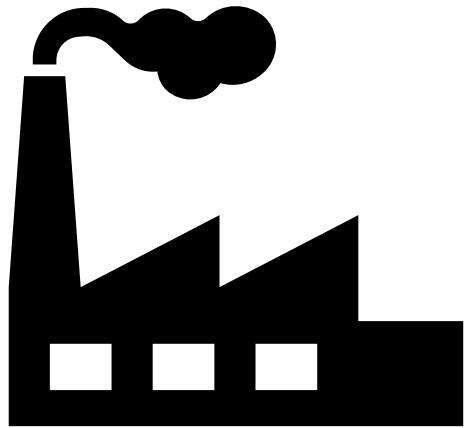
Train

Document

blu|marble

Considerations

- **Implement based on the detailed Project Plan**
  - The plan will evolve as the project progresses

- **The model structure(s) must be completed and signed off by the client prior to any other implementation work**

- **Apply an iterative approach to Build / Test / Design**
  - Thorough unit testing
  - "Conference room pilot(s)" to confirm requirements / look and feel

- **Consistent Knowledge Transfer to Client SMEs**
  - Client SMEs assigned / with project deliverables
  - Administrator(s) assigned / mentored and trained

- **Systems Integration Testing protocols**

- **Structured User Acceptance Testing protocols**

- **Development of Documentation and Training Materials**
  - This is an ongoing task
  - Some of these materials will be the responsibility of the Client

- **Migrations**
  - BluMarble responsible for Dev to Test
  - Client responsible for Test to Production

Deliverables

- **Status report template**

- **Project Issue Log**

- **Detailed Design Document**

- **Artifacts**
  - Object Inventory
  - Integration Process Design Document
  - Security Matrix
  - Reports and Dashboards Catalogue
  - Workflow Design Document

- **Test Plan (client led)**

- **UAT Scripts (client led)**

- **UAT Issue Log**

- **User Guide & User Training (client led)**

- **Administrator Guide**

- **Migration checklist**

blu|marble
MANAGEMENT GROUP

Phase 3 - Production

Production GO-LIVE

GO-LIVE Support / Warranty

Sustaining Support
(In-house or Managed Services)

blu|marble
MANAGEMENT GROUP

Considerations

- **Client organization "Migrate to Production" procedures**
  - **Understood and followed**
- **Support processes communicated**
- **Users trained**
- **Administrator(s) prepared**

Deliverables

- **Production readiness (client led)**
- **Migration manual**
- **Go-Live Issues Log**
  - **Resolution of GO-LIVE issues**
- **Project Signoff Document**
- **2 weeks on-site GO LIVE support**
- **Support model (client to choose)**
  - **In-house**
  - **BluMarble Managed Support**
- **If BluMarble Support:**
  - **On-Boarding Checklist**
  - **Transition Readiness Documents**
  - **Knowledge Transfer workshops**
  - **Monthly Service Report**

Methodology Success Factors

Confidence in Contracting

- Initial contract – small investment from the client
- Detailed project plan and costing

Structured, yet Flexible Methodology

- Foundation (model structure/security/data sources)
- Time boxed iteration of model processes
- Time boxed key report development

Dedicated SME(s)

- Knowledge transfer to implementation team
- Understands the technology and "owns" the application
- Provides stewardship and reduces overall Cost of Ownership
- Responsible for development of training manuals / admin guide

Dedicated space for project team (SMEs & consultants)

- Facilitates collaboration/design/implementation
- Maximizes knowledge transfer

blu|marble
MANAGEMENT GROUP

Why BluMarble?

- **Focused, experienced Oracle EPM implementation team**
  - Delivered dozens of successful engagements
  - 12+ years average tenure with Oracle/Hyperion product set
  - EPM specific project methodology; battle tested
  - Project documentation is first rate; basic deliverable

- **Relationships build trust, trust builds relationships**
  - All projects have tough moments
  - Our solution architect and team need to get to know your project team to build relationship and build trust

- **Transparent contracting**
  - Detailed review of all project phases, resources, and deliverables

- **Business Process savvy**
  - Perfect time to assess your business processes; identify improvement opportunities
  - Our consultants are skilled communicators; will listen, will push back

- **Short term help**
  - Mentoring, administrator training, staff augmentation, budget cycle support

blu marble
MANAGEMENT GROUP