

BM5446: Successful Global Vault/SAP Implementation: setting and managing expectations!

Driss Yammouri, PMP
Consulting Project Manager
Autodesk Global Services

Who is Driss?

- Industrial Engineer, PMP
- Manager MFG Project Managers EMEA at Autodesk
- + 15 years of consulting experience
 - Data Management, ERP Integrations
 - Visualization, Factory Design
- Project Management
- Implementation, Coaching, Training
- Acting on a global basis
- Based in Munich, Germany – Married, 1 Daughter
- E-MAIL: Driss.Yammouri@Autodesk.com



Class summary

- Collaboration. Security. Integration. Just to name some critical success factors / business goals for driving changes. We want to highlight in this class the approach we took in implementing Vault in a multi-site environment and integrated in the SAP environment. What are the challenges? What are the benefits? How to set and manage the expectation of several stakeholders? What are the lessons learned? Which kind of improvements need to be addressed first? All the questions to show how you can manage complex implementation projects, ensuring that the defined business goals are met by delivering the right system using the right methodology. We will use a real customer project to showcase our experience.

Key learning objectives

At the end of this class, you will be able to:

- Plan a global implementation project involving several customers/departments
- Ensure business requirements are captured properly and addressed in the designed solution
- Know how important is the communication internally and externally, especially in a virtual project environment
- Identify and monitor risks that could influence your project

Agenda

- Introduction
- Business Goals – Challenges
- Introduction into the project
- Lessons Learned & next steps



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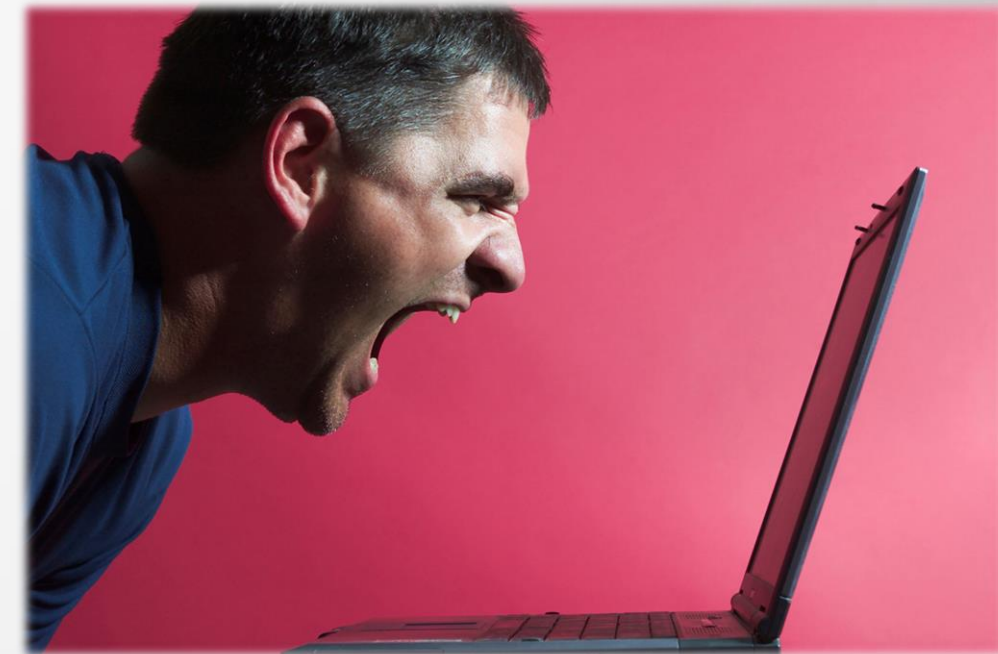


Challenges – Business Goals

 AUTODESK.

Pain points

- Heterogeneous technologies and processes in place
- Inefficient work processes over several development and production sites
- Failures, mistakes
- Issues with data transfer between sites
- Communication with remote offices
- Redundant data and extra work

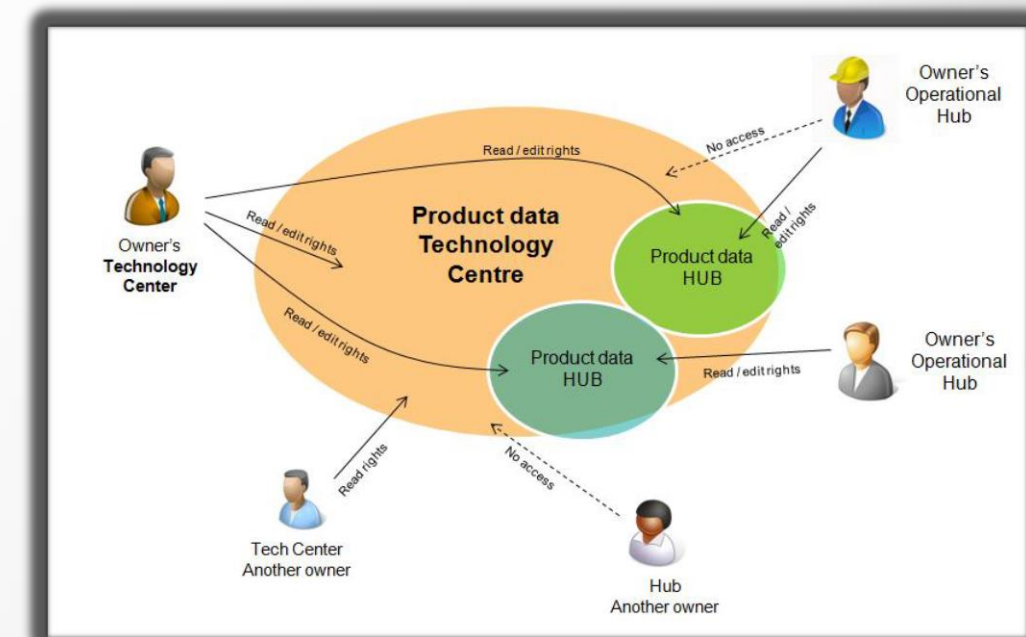


Compelling Reasons to start this project

- Standardize processes and systems
 - Collaboration
 - Integration
 - Security

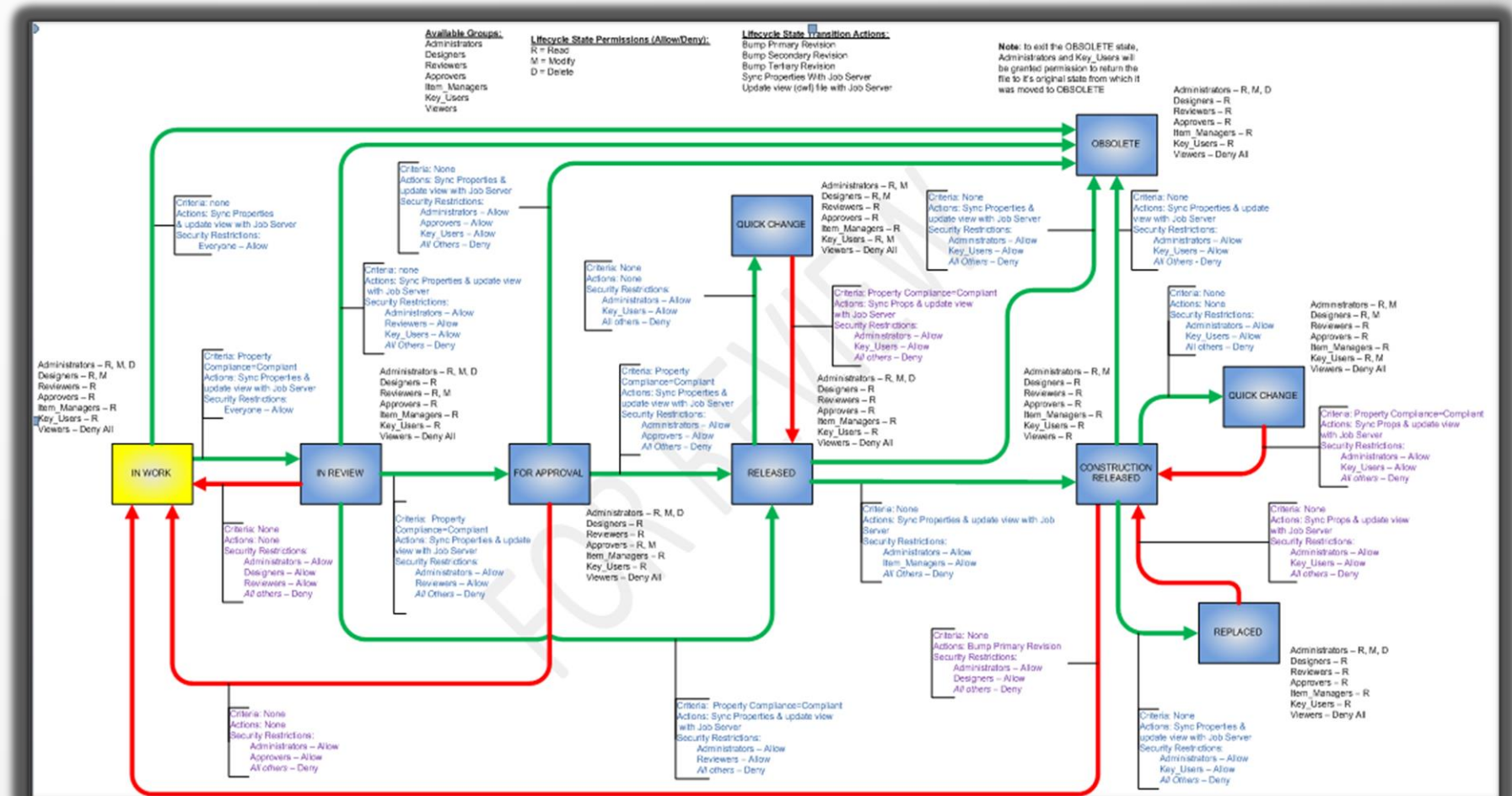
Collaboration

- Support and facilitates engineering **collaboration** locally and globally



Integration

- Improve local engineering efficiency through increased **reuse of data** and **integration** into the **business processes**



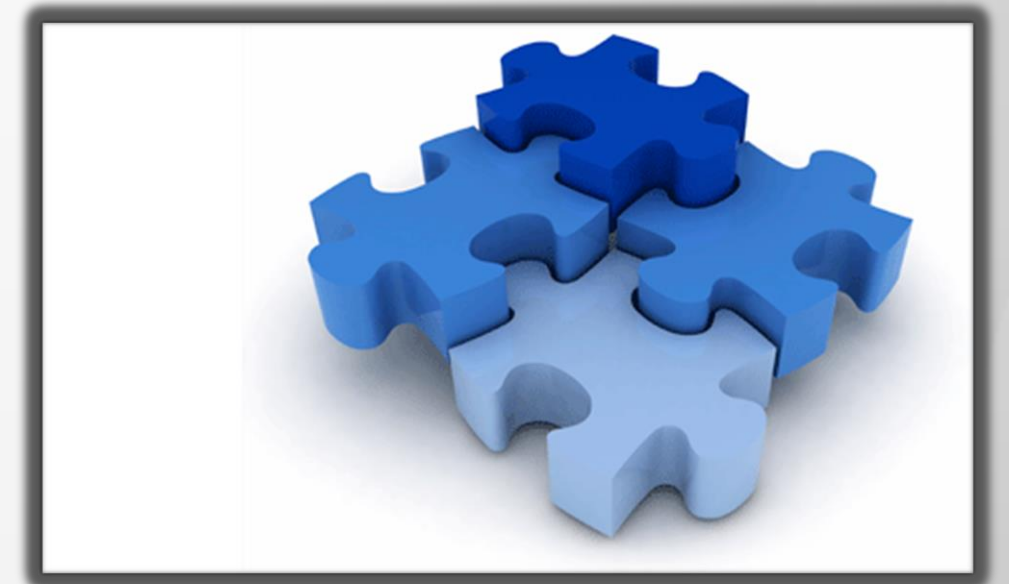
Security

- Improve the **Intellectual Property (IP) protection** and **security**



Standardization

- Standard solutions and standardized processes to cover the main needs for global engineering, considering:
 - Collaboration
 - Integration
 - Security
- Global standards vs. local consideration



Introduction to the project



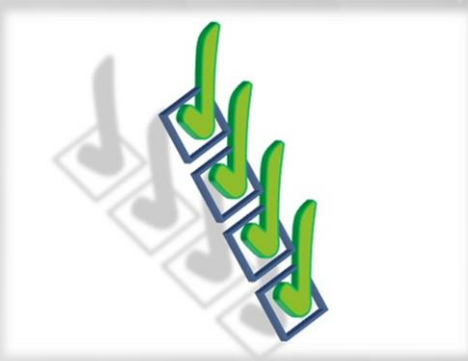
Project Objectives

- Build a **standard solution** around Vault as a Data Management platform for all Product Lines within the group.
- Address the needs from Global Engineering: **secure** and **control** engineering work, enable **multi-site** project execution to improve resource utilization and optimization between global locations.
- **Integrate** with global SAP environment.
- **Knowledge transfer** to the technical Team in implementing and Maintaining Vault for the different engineering locations.

Project Description

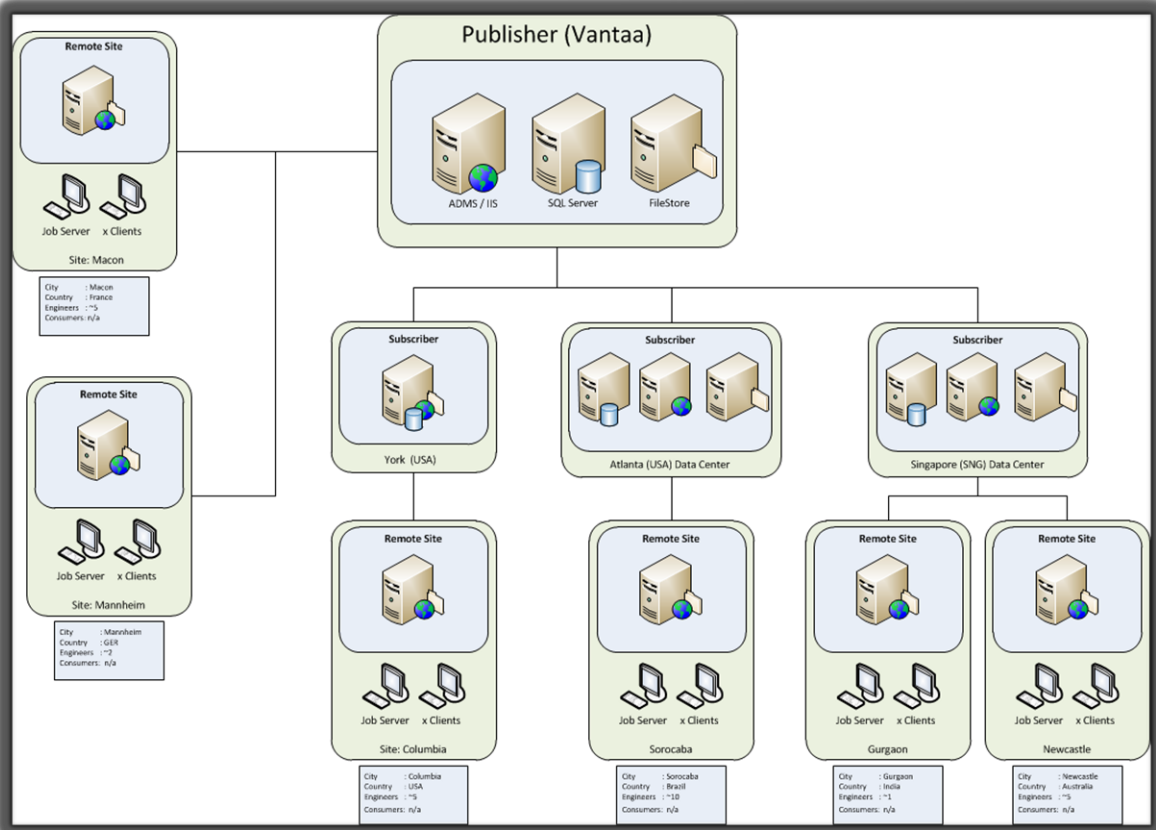
- Implement Autodesk Vault Professional based EDM solution in several sites.
- Integrate Vault in the existing SAP environment.
- Knowledge transfer from Autodesk Consulting to customer Engineering Application Team.

Project Scope

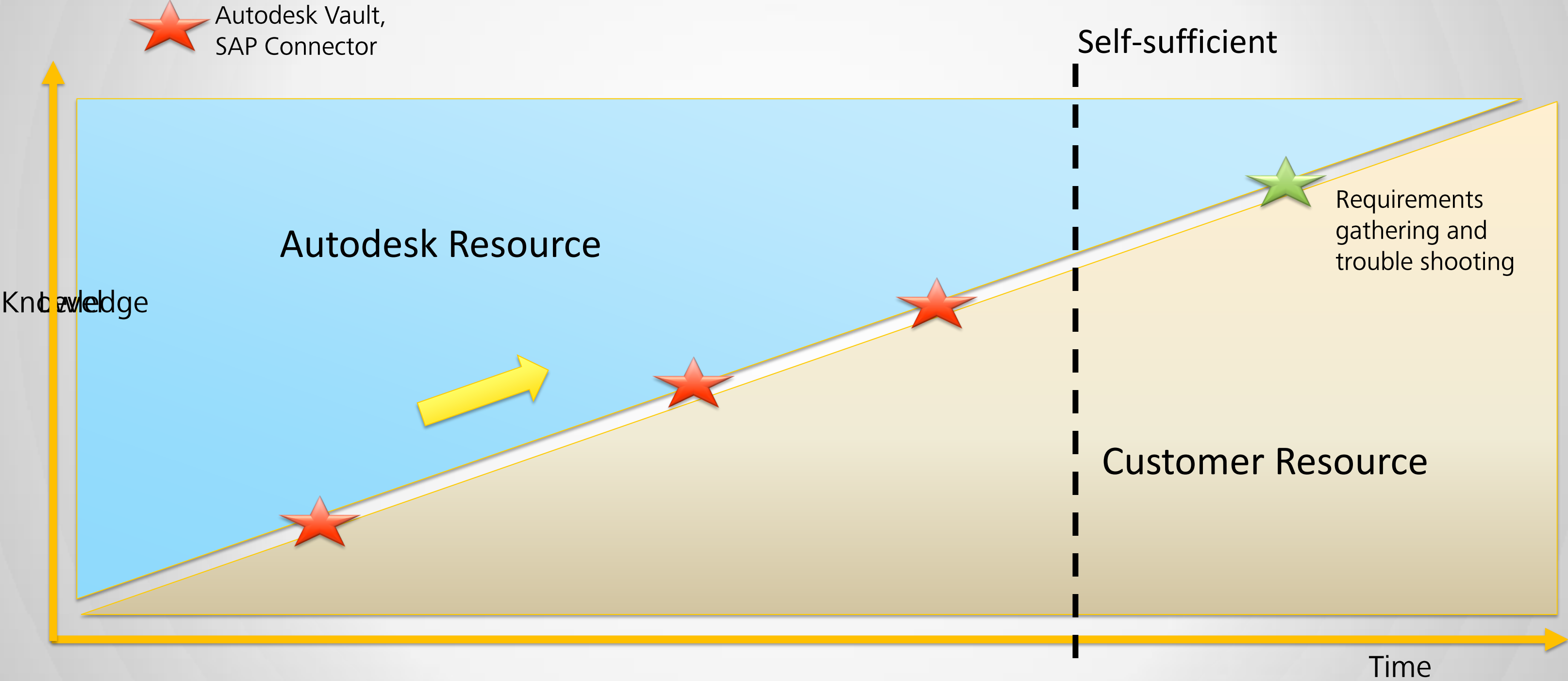


- Ensure the successful planning of the deployment of a Vault Professional/SAP Integration
- Define the detailed architectural solution design
- Define the detailed solution security design
- Define the replication and distribution schema design for the engineering product data
- Define the process, support implementation and configuration of SAP integration with Vault Professional
- Define and document procedures for Administrative Operations and Maintenance
- Project Management to align Autodesk resources to project tasks and goals

Project Scope



Knowledge Transfer



Project Challenges

- Infrastructure/hardware in place on time
- Data and content centre readiness – separate project
- Global engineering process
- Globally replication environment
- Performing the project remotely
- Tight schedule
- Project Scope definition vs. Business Expectation

Measure of Success

- Integrated and automated workflow from CAD to Vault to SAP
- Enabled collaboration of engineers across 6 sites
- User Acceptance & Autonomy
- Gain in time and quality
- Minimum loss of productivity

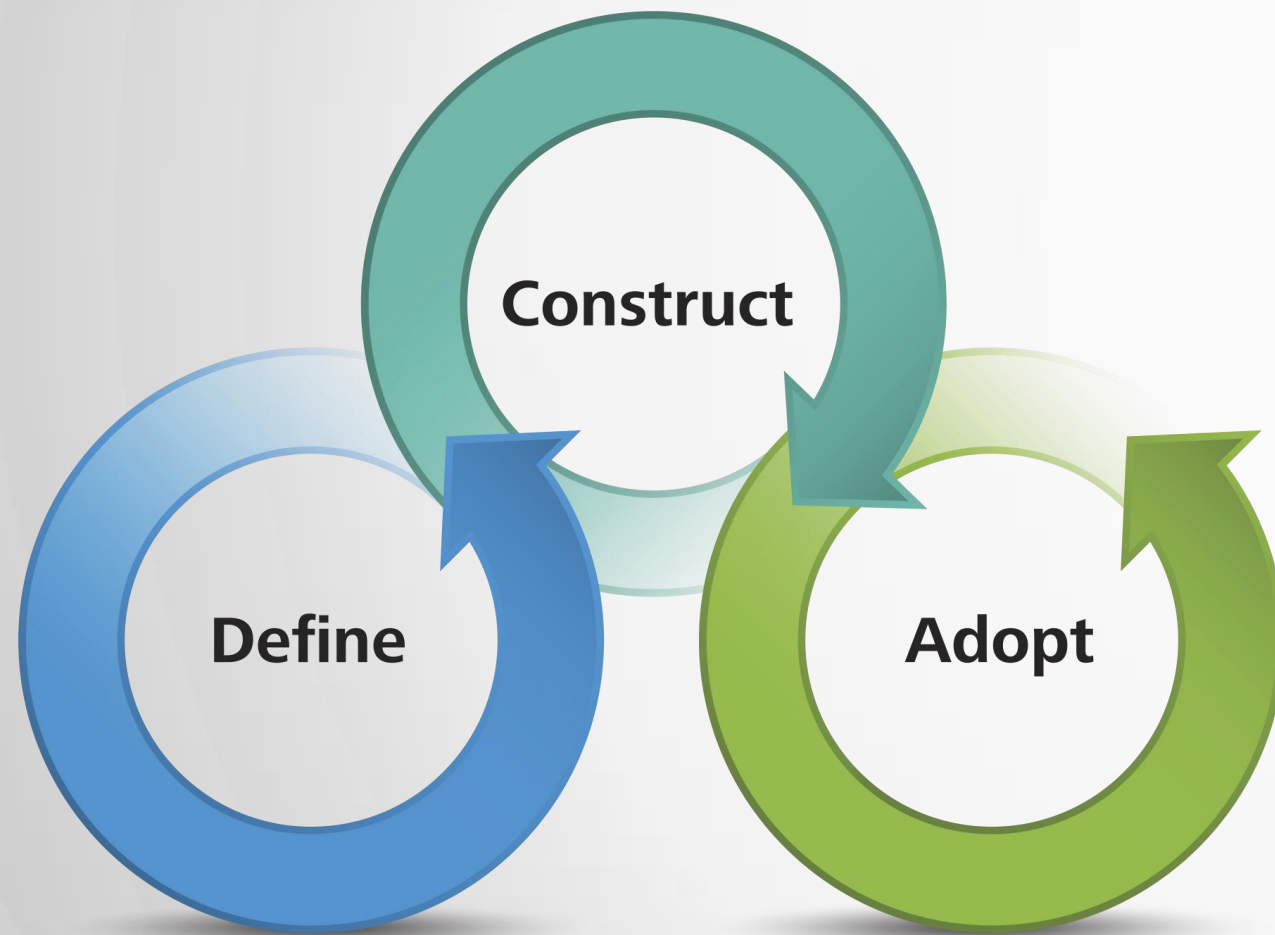


Project Setup & Methodology



Autodesk Business Value Methodology – BVM

AUTODESK® BUSINESS VALUE METHODOLOGY



Define Phase

Business value has been agreed. A roadmap and high-level plan are in place. Success metrics have been identified.

Construct Phase

Solution has been designed, developed, and tested. All data has been migrated. Baseline metrics are available. An adoption plan has been created.

Adopt Phase

All users are trained and the solution is in production with ongoing mentoring to ensure productive use. Metrics demonstrate business value.



Business Alignment

Vision & Goals

Benefits Identification

Solution Objectives

As-Is Analysis

Analysis Preparation

Data Collection & Analysis

To-Be Design

Process Definition

Roadmap Development

Adoption Planning

Requirements Specification

Requirements Capture

Requirements Analysis & Elaboration

Solution Design

Solution Specification

Functional & Non-functional Design

Detailed Design

User Methods Development

Solution Build

Environment Setup

Custom Development

Product Configuration

Deployment Plan Development

System Testing

Education & Documentation Development

Deployment Package Creation

Pre-Production Staging

Solution Deployment

User Acceptance Testing

Performance Testing & Tuning

User Education

Production Deployment

Adoption Execution

Solution Tuning

User Mentoring

Solution Support

Solution Maintenance

Solution Upgrade



Business Alignment

As-Is Analysis

To-Be Design

Requirements Specification

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Pre-Production Staging

Production Deployment

Solution Support

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Functional & Non-functional Design

Custom Development

User Acceptance Testing

Solution Tuning

Solution Upgrade

Solution Objectives

Adoption Planning

Detailed Design

Product Configuration

Performance Testing & Tuning

User Mentoring

User Methods Development

Deployment Plan Development

User Education

Project Management

System Testing

Education & Documentation Development

Deployment Package Creation



Project management

All activities related to:

- The initiation and planning of the project
- Communicating project progress status and health
- Managing and mitigating project risks and issues
- Managing project change
- Controlling project costs, schedule and resources
- Closing out the project



Initiation & Planning

Execution, Monitoring & Control

Closure

Handover from
sales

Create
Schedule

Create PM Plan

Kick-off Project

Report Status

Manage Risk

Manage
Change

Govern Project

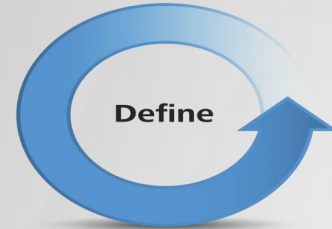
Review Project

Close Project

Handover to
Support

Create
Reference

Mapping the BVM to customer needs and methodology



Project Management

As-Is Analysis

Analysis Preparation

Data Collection & Analysis

To-Be Design

Process Definition

Architectural Solution Design

Collaboration: Replication and Distribution

Requirements Specification

PRE-STUDY

Requirements Capture

Requirements Analysis & Elaboration

Detailed specifications

Solution Design

DESIGN

Solution Specification

Detailed Design

Solution Security Design

Solution Build

BUILD

Installation & Configuration

Custom Development?

System Testing

GIT

Key User Training

Documentation: Administrative Operations & Maintenance

Pre-Production Staging

User Validation Testing

ISSUE RESOLUTION

User Training

Production Deployment

Adoption Execution

User Mentoring

Solution Support

Solution Maintenance

Solution Support

POST GO LIVE SUPPORT

Plan & Pre-Study

Design & Build

Testing & Training

Go-live & Support

Business Value Methodology | Benefits

- Defines how we work to deliver value to our customers:
- Enables us to exceed the expectations of our customers.

Structured approach: plan, propose and execute.

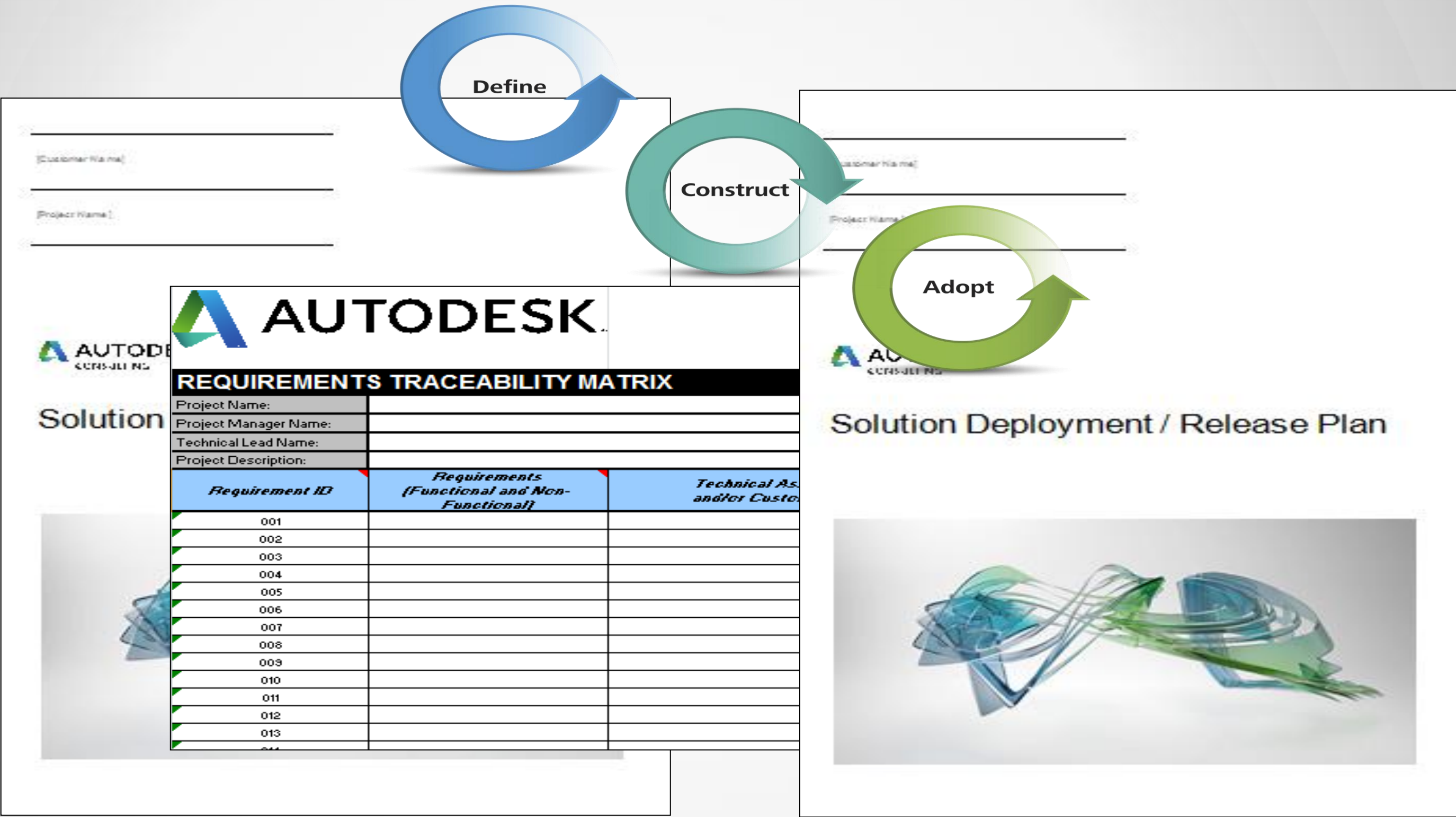
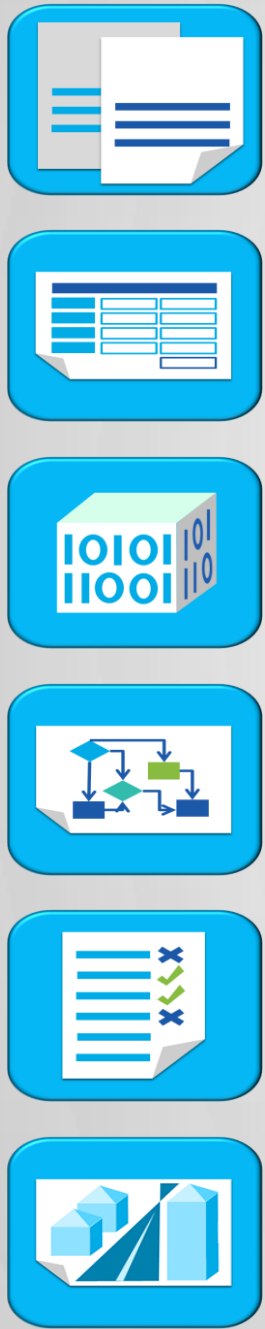
Overarching framework: customer knows what to expect.

Outlines processes, risk mitigation and customer success measurement.

Provides a higher quality experience to our customers.

Provides metrics for our improved quality & efficiency.

Business Value Methodology | Templates, Tools & Deliverables



Business Value Methodology | Scalable Adoption



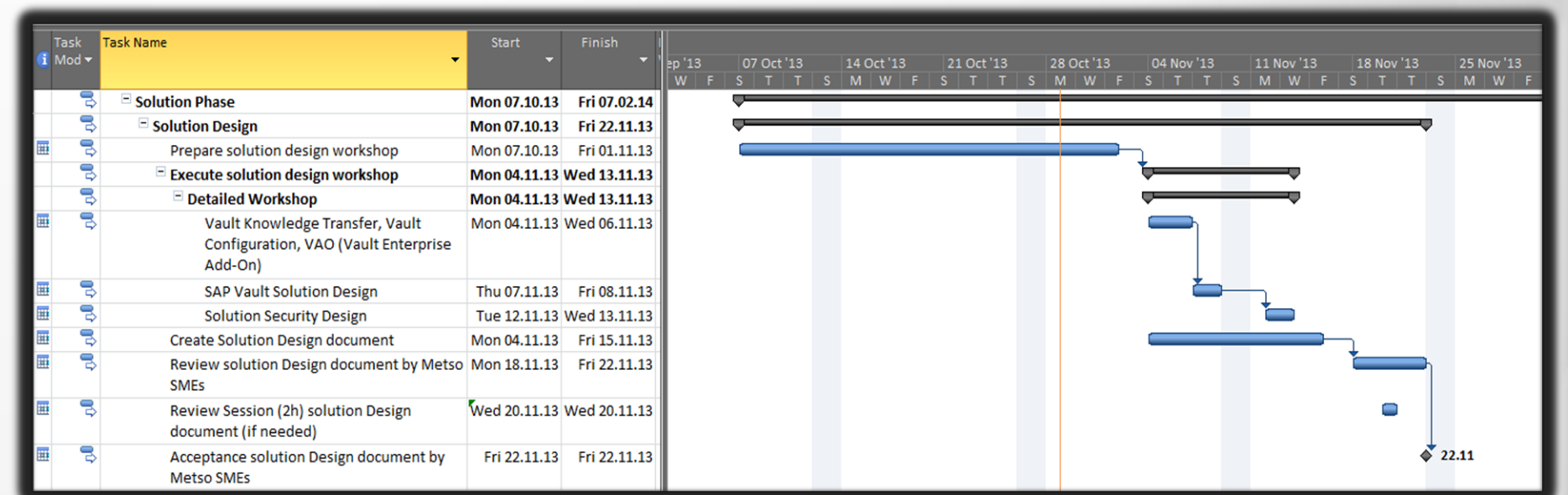
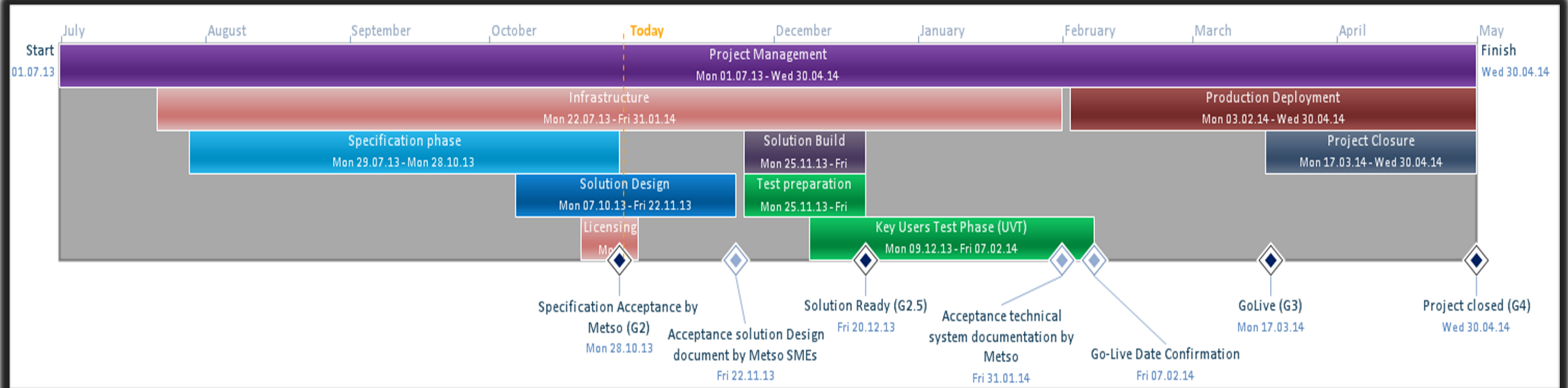
- Business Value drives scale of solution and deliverables.
- Project Management for smooth delivery.
- Adoption ensures the customer can use the solution.

Project Governance



- Define the deliverables
- Define the schedule and the milestones
- Define the project structure and the communication
- Identify the risks and define the mitigation strategy
- Define change management process
- Agree on the above

High level schedule



Communication



Effective communication is essential for success

- Define communication plan
- Communicate to all involved parties
- Explain the relevance of the project to each stakeholder
- Involve the parties early enough in the decision making process
- Make communication a two-way proposition
- Ensure communication is an ongoing activity, not a one-time event
- Give some keyusers proper tasks to support the project goals
- Be consistent and clear

Communication Plan

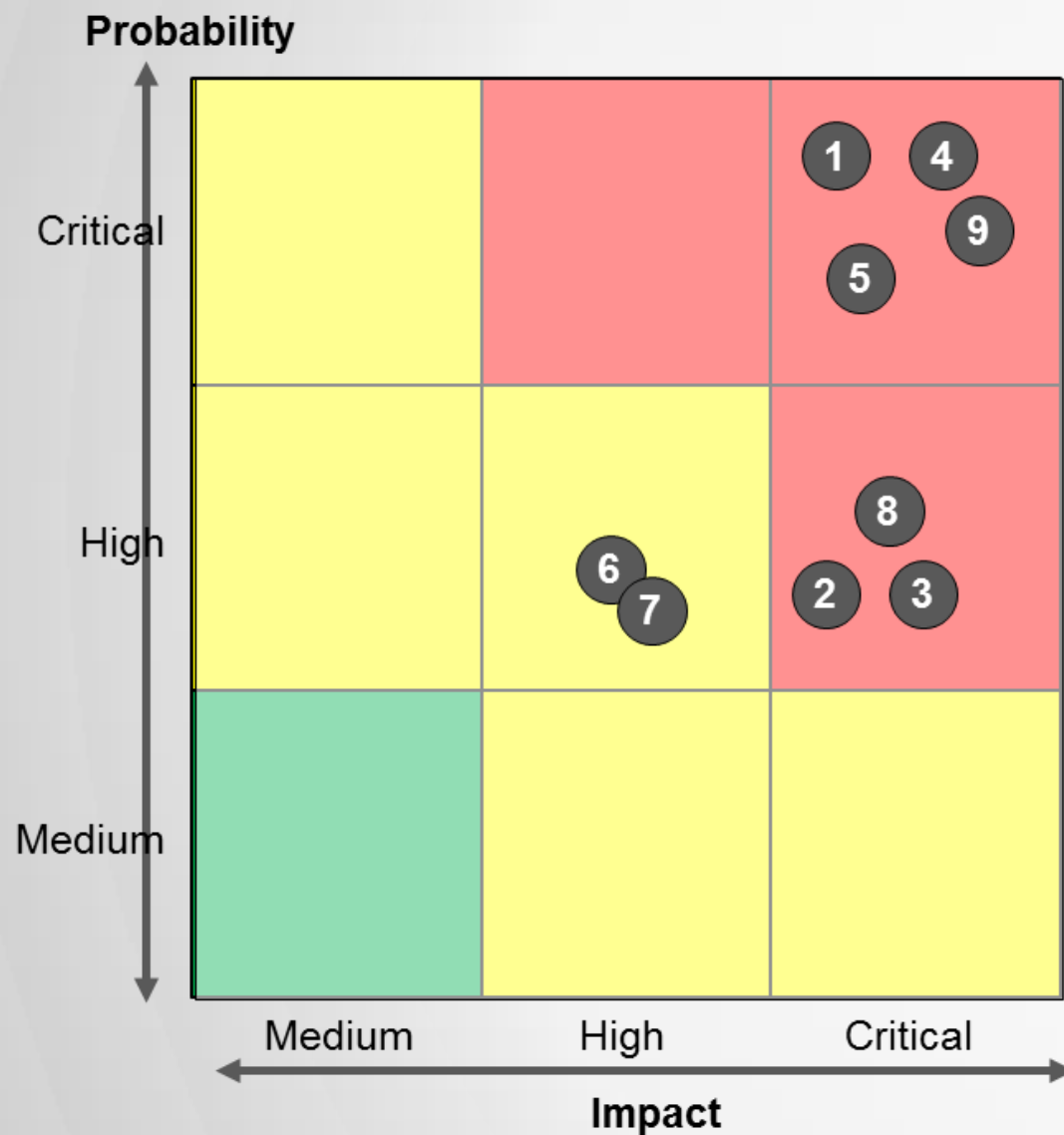
Communication Event	Site / Country	Date	Audience														Other(s)	Message / content	Channel	Frequency	Owner
			Steering Committee	Project Sponsors	Project Team	Local Managers	Key Users	End Users	Project Managers	PMO	Interest Group	Engineering Advisory Group									
Kick-off meeting	YORK	Aug, 28th	X	X	X	X			X		X							Project overview	Face-to-face	One-time	PMs
Status meeting	Remote	TBD			X													Weekly briefing	Teleconference	Weekly	PMs
Steering committee status meeting	Remote	TBD	X	X					X		X							Monthly briefing	Teleconference	Monthly	PMs
Status update	Remote	TBD							X									Status briefing	Teleconference	Weekly	PMs
PMO status report	Remote	TBD							X									Monthly briefing	Teleconference	Monthly	PMs
Key user meeting	TBD	TBD					X		X									Monthly briefing	Teleconference	Monthly	PMs
User acceptance test meeting	TBD	TBD			X		X		X									Status briefing	Teleconference	twice-time	PMs
Final acceptance meeting	TDB	TBD	X		X				X	X								Status briefing	Teleconference	One-time	PMs
Status meeting for advisory group	Remote	TBD										X						Status briefing	Teleconference	Bimonthly	PMs

Risks and Mitigation



Risk Categorization

Risk Details



Nb	Date Risk Identified	Risk Description - What might happen and what would it impact?	Probability of Occurrence	Magnitude of Impact	Risk Rating	Risk Mitigation - Plan & Actions with dates	Risk Owner	Risk Status
1	23.07.2013	Infrastructure/Licenses (workstation/servers) - Lead time of deliver server and workstation Licenses included in this project i.e SQL	H	H	High	The team has plan it in advance. Will continue to check regularly the delivery status	PM	Closed
2	23.07.2013	Windows 7 project schedule - Delay in this project will affect schedule and availability of resources.	M	H	High	The team needs to check the status and coordinate it with Windows 7 Project Manager	PM	Closed
3	23.07.2013	CAD update project schedule - Delay in this project will affect schedule and availability of resources.	M	H	High	The team needs to check the status and coordinate it with CAD Project Manager	PM	Closed
4	23.07.2013	Product Lines project team availability - Lack of resource due to a huge project development on going	H	H	High	Planned in advance with the Product Line Managers - will communicate the detailed resource management document (schedule)	PM	Closed
5	23.07.2013	Data migration is out of this project scope - Scope, resource, data extraction methods, etc	H	H	High	To be clarified during workshop in Aug. separate project in place	PM	Closed
6	23.07.2013	Content Centre readiness - Status?	M	M	Medium	Status to be checked with Project Manager	PM	Open
7	23.07.2013	Specific requirements i.e. Security - Customization may be needed - Impact the	M	H	High	To be clarified during workshop in Aug. Budget for customization in place	PM	Closed
8	23.07.2013	Communication to all users affected by the project - Confusion, a lot of question about systems, requirements... - Impact: resistance to the proposed solution??	M	H	High	Product line managers will be responsible to communicate the proper level of details of the ongoing activities for the engineering managers	PM	Closed
9	25.07.2013	Different processes for different Product Lines - Design different solutions for each Product Line. Impact on cost, schedule and scope	H	H	High	Management Business Line should define a standard global engineering process	PM	Closed
10	03.04.2014	Business expectation vs. Project scope 2D environment is not covered by current project scope (3D integration with SAP)	H	H	High	Address the gaps in management meetings and get parallel projects in place	PM	Closed

Lessons learned



- Involve also low level of stakeholders in order to make sure they are aligned with the project goals.
- Check the expectation and feedback from the key users, the management and all stakeholders periodically
- Communication is key! Even by having communication plan in place it doesn't always mitigate communication issues due to remotely project team
- Sometimes you need to communicate individually and not during a big meeting
- One on one meetings with each site

Lessons learned



- More face-to-face meetings.
For the project team and also with the stakeholders.
Smaller groups for workshops. Remote workshops are not effective!
- Even if users are familiar with the „basic“ solution, introduce the standard solution in details (training) before starting requirements gathering.
- The proper infrastructure is a must for a successful implementation.
- Keep project team small. The Knowledge transfer can be done separately.
- All risks were identified and also regularly monitored. However project team were not empowered to execute the mitigation plan
- Strategic relationship enables access to all relevant Autodesk teams

Next steps

- Address new Product Lines
- Start with the standard environment and implement later the Product Line “specific” topics
- Migration and merge from legacy systems
- ...



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- LinkedIn Group – “Vault User and Experts” **JOIN TODAY**
- Like Us on Facebook - <https://www.facebook.com/autodeskvault>
- Follow us on Twitter -@AutodeskVault
- Read more about Vault and PLM 360 - <http://underthehood-autodesk.typepad.com/>
- Bi-monthly web based users meetings, mini AU classes – “Vault Talk”, follow the site above to learn more

