

# Collaborative versus Customer Managed Projects

BY: NICK NESBITT, EP PRACTICE MANAGER, COGNOS, HAMMERSMITH, UK

## RECOMMENDED APPROACH

Post-sales consultancy involvement starts with the preparation of a Professional Services Proposal. This stipulates a high-level cost and consultancy estimate on a time and materials basis including required technical infrastructure based on preliminary discussions as to the business requirement.

Upon confirmation of the sale or the proposal being accepted and a purchase order being raised, a scoping exercise is carried out by a designated Cognos Engagement Manager in association with the key client contact for that particular area. The objective of the scoping exercise is to produce the Customer Success Plan (CSP).

The CSP contains the detailed business requirement, a list of the detailed tasks involved to facilitate the delivery of the requirement with the appropriate designated resources allocated to those tasks, success criteria, training recommendations, pre-implementation recommendations, risks, technical requirements, communications plan and future scope items, again all on a time and materials basis. It is at this point that consultancy resources are designated to the project by liaison between the Engagement Manager and the Cognos Operations Manager, based on the appropriate level of technical expertise as befits the project requirement, duration of the assignment and availability.

This preferred method demonstrates a collaborative approach to the project where the Cognos Consulting team shares risk by becoming an integral part of the client team. The Cognos resources are therefore jointly responsible and accountable for the quality of the deliverables and the overall success of the project. In our experience this approach leads to the most successful and efficient performance management deployments.

A vital component of this preferred approach is the Engagement Manager. The Engagement Manager has been assigned to the

project for its entire duration to monitor the satisfactory delivery of the requirement as detailed in the project plan. The Engagement Manager will act as the first formalized level of escalation upon the identification of any issues, organize and coordinate the resources throughout the project lifecycle and most importantly play a critical role in mitigating overall project risk.

## AD HOC CONSULTANCY

This type of consultancy differs from the Cognos preferred approach to project implementations in several key ways. Generally, there is no Professional Services Proposal created by a Cognos Engagement Manager, nor is any scoping exercise carried out and no project plan prepared. The approach is very different from the collaborative deployment practice and rests entirely on the client owning the project for its entire lifecycle.

As with the preferred approach detailed above, the work is carried out on a time and materials basis. However, Cognos cannot be accountable for the ultimate delivery of a successful project or phase of a project, and the ownership of the work carried out throughout the project is entirely the responsibility of the client. This means that the risks of the project do not reside with Cognos, and are borne entirely by the client and the client's project team.

The method by which this type of consultancy is resourced is also significantly different. Typically, an Engagement Manager is not directly assigned to ad hoc consultancy work. The client will liaise with the Cognos Operations Manager and a resource requirement will be generated.

At this time the client will be asked to confirm the booking by signing a work order, which must be signed prior to the consultant's arrival at the client site. The order confirms the duration of the visit and details the applicable day rates.



THE NEXT LEVEL OF PERFORMANCE™

At the end of the consultant visit, it may be determined that extra consultancy days are required. This is again organized between the client and the Cognos Operations Manager, to ensure availability in light of other client resource and project work requests. Often owing to other client commitments, the consultant's stay cannot be extended immediately. And it should be noted that, if another visit is to be arranged, no guarantee can be made as to obtaining access to the same consultant to continue the work. The resourcing of the new extended request will be based solely on the availability of consultants in light of other client commitments and project work.

**SUMMARY**

Although Cognos has a preferred implementation method, we recognize that time and budget constraints might prohibit this approach from being adopted. In recognition of this, we do offer ad hoc consultancy as an alternative.

	Collaborative	Client Managed
Engagement Manager	Yes	No
Time & Materials basis	Yes	Yes
Collaborative	Yes	No
Shared Risk	Yes	No
Accountable	Yes	No

**FOR MORE INFORMATION:**

Cognos Consulting has developed a short audio visual entitled 'Getting Started: How Consulting Services Can Help You'; the purpose of which is to challenge you as you prepare your project plan and assemble your project team. Cognos wants you to be successful and we are happy to work in whatever role you need, it is your choice, but we do want you to make the right choice for your project and business. Cognos has truly vast experience in the Enterprise BI, Enterprise Planning and Consolidation, Scorecarding and DataWarehousing project delivery and by challenging you Cognos hopes to help make you and your projects using our technology, that much more successful. To experience the 'Getting Started: How Consulting Services Can Help You' audio visual please go to <http://support.cognos.com/en/consulting/about/resources.html>.

If you have any concerns about your project plan, resources, quality issues or risk concerns in general, please contact your local Services Manager or Account Manager (<http://support.cognos.com/en/consulting/about/contact.html>) and let Cognos advise you.

*Your success is our commitment!*



THE NEXT LEVEL OF PERFORMANCE™