Consulting Companies – Friend or Foe

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About SpearMC and Your Presenter
About SpearMC

Founded in 2004, SpearMC is a technology and professional services firm specializing in:

- PeopleSoft Financials and Supply Chain Management
- PeopleSoft Human Capital Management
- Application Development
- Project Management
- Change Management
- ERP Training
About SpearMC - Recognition

- Inc. Magazine recognized SpearMC as one of the Inc. 500|5000 Fastest-Growing Private Companies in America
  - 2013 – #1,556
  - 2012 – #2,418

- The San Francisco Business Times named SpearMC one of the 100 Fastest-Growing Companies in the Bay Area
  - 2013 – #9
  - 2012 – #66
About SpearMC – Services & Competencies

Technology and Business Consulting

- Full-service ERP and BI Selection, Implementation and Integration
  - PeopleSoft
  - JD Edwards
  - Oracle EBS
  - Hyperion
  - Dynamics AX
- ERP Training
- IT Transformation, IT Strategy and IT Infrastructure
- ERP Bolt-On Applications Development
- Capability Assessment
About SpearMC – Services & Competencies

- Program and Project Management
  - Project Management Office
  - Project Portfolio Management
  - Change Management

- Business Transformation
  - Operations Improvement (Six Sigma, Lean, etc.)
  - CIO and CTO Advisory Services
  - Strategy for Pricing and Revenue Enhancement
About Your Presenter – Tony Townsend

- HCM Practice Director
- Specializations:
  - PeopleSoft ERP Human Capital Management
  - Project Management
  - Sales Support
  - Delivery of Services
- Certified PeopleSoft HCM
- 20+ Years experience…majority PeopleSoft
Consulting – A Definition
Consulting exists to provide knowledge, skills and staff augmentation for clients.
Project Types

- Project Type driving factors
  - One-time, recurring, or Ad Hoc
  - Client software knowledge base
  - Change Management (training, knowledge transfer, etc.)
  - Project Management needs
  - Project duration
  - Project team size
  - Required consultant skills & experience level
  - Duration and team size scale with number of modules, size and complexity of organization
Project Types - continued

- ERP Implementation
  - One-time project
  - Minimal client software knowledge base
  - Significant Change Management requirements
  - Significant client and consulting project team
  - Significant Project Management requirements (1+ FTE)
  - Longer project duration (4 months - ? years)
  - Junior to Architect level consultants appropriate
ERP Upgrades

- Large reoccurring project (every 2-5 years)
- Strong client software knowledge base
- Small to moderate Change Management requirements
- Medium client and consulting project team size
- Medium Project Management requirements (1 FTE)
- Medium project duration (4 – 12 months)
- Mostly Senior level consultants appropriate
Project Types - continued

- Subsystem Implementation
  - Medium one-time project
  - Minimal client software knowledge base
  - Significant Change Management requirements
  - Small to medium client and consulting project team size
  - Small Project Management requirements (0 – 0.5 FTE)
  - Short to medium project duration (1 – 6 months)
  - Mostly Senior level consultants appropriate
Project Types - continued

- **Ad Hoc Projects**
  - Small one-time project (e.g. system audit, report writing, Open Enrollment configuration for new plan year, etc.)
  - Medium to high client software knowledge base
  - Small Change Management requirements
  - Short to long project duration (days to years)
  - Mostly Senior level consultants appropriate
Project Definition

- Determine Project Type
- Create a Statement of Work that clearly defines:
  - Project goals
  - Deliverables
  - Features
  - Costs
  - Deadlines
- The definition of success must be understood by all team members.
- Finalization of project must be well planned
Project Management

- Project Management is a shared responsibility
- PMP or not?
- Project Managers define:
  - Activities
  - Activity sequencing
  - Activity resource estimating
  - Activity duration estimating
  - Schedule development
  - Schedule control
- Project status understood at all times
- Scope Management
Project Management - continued

The Project Triangle

Features

Cost  Time

Three factors constrain every project.
You control two and only two.
Resources

- Project Teams may include:
  - Steering Committees
  - Project Managers
  - Team Leads
  - Subject Matter Experts (functional & technical)
  - Trainers
  - Documentation Specialists

- Determining resource requirements are critical to project success

- Honestly assess client resource availability for project tasks
Resources - continued

- Sourcing resources is time consuming and challenging
- Develop relationships with trusted vendors
- Avoid common consulting company shenanigans
  - Bait and Switch
  - The 2 for 1 consultant swap (Infinite Monkey Theorem)
  - The ‘Shadowing’ consultant
  - The ‘Shared Resource’
- Right person, right time and right place
It’s your choice…

OR
SpearMC Tools & Resources

• www.SpearMC.com
Get in touch

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Please complete the session evaluation

We appreciate your feedback and insight