Solid Works - SketchUp

Project Procurement Plan

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Submitted for: Prof. Mona Brennan-Coles

Submitted Date: 08/02/2024

**PROJECT PROCUREMENT PLAN**

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| PROJECT NAME | Solid Works - SketchUp |
| PERFORMING DIVISION | IT Support & Services Department (ISSD) |
| PERFORMING GROUP | Group 10 |
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Prepared by

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Table of Contents

[1. PROJECT PROCUREMENT PLAN PURPOSE 3](#_Toc116512636)

[2. PROCUREMENT PLAN DEFINITION 4](#_Toc116512637)

[2.1. Procurement Overview 4](#_Toc116512638)

[2.2. Procurement (Detailed) Description 4](#_Toc116512639)

[2.3. Procurement Process 7](#_Toc116512640)

[2.4. Procurement Risk Analysis 9](#_Toc116512641)

[2.5. Selection Criteria and Response Evaluation 9](#_Toc116512642)

[2.6. Estimated Budget 11](#_Toc116512643)

[2.7. Contract Type and Standards 13](#_Toc116512644)

[3. APPROVALS 14](#_Toc116512645)

[4. REFERENCES 15](#_Toc116512646)

## **PROJECT PROCUREMENT PLAN PURPOSE**

The purpose of the procurement plan for laptop procurement management under the SketchUp project at Solid Works is to facilitate a seamless transition of the Services and IT Support Department (SITS) to the new office space on Monday, February 12th, 2024, driven by business growth. The SketchUp project aims to relocate 10,000 current employees along with office equipment, individual files, and supplies.

Specifically, the procurement plan aims to:

* **Define Procurement Terms**: Clearly outline procurement process terms, including laptop and electronic accessory specifications, training requirements, delivery schedules, and payment terms.
* **Agree with the Vendor**: Establish mutually beneficial agreements with selected vendors for laptops, electronic accessories, and training service procurement, encompassing pricing, delivery timelines, warranties, and support services.
* **Determine and Reduce Risks**: To identify possible risks associated with procurement, such as vendor dependability, delivery delays, cost overruns, and training efficacy, conduct a thorough risk assessment. Create risk-reduction plans to deal with hazards before they become apparent.
* **Define Cost**: Compute the entire cost of procurement, including laptops, electronic accessories, vendor services, and training costs. Make sure that this amount is in line with the funds allotted for the SketchUp project.
* **Make Purchase Orders**: Produce comprehensive purchase orders that include item descriptions, quantities, costs, delivery schedules, and vendor details. Make sure that all terms and conditions are met by adhering to the vendor agreements.
* **Acknowledge purchase orders, release finance bills, and grant permission**: Assist in receiving purchase orders from suppliers, checking them for accuracy against the terms that were agreed upon. Release finance bills in accordance with financial regulations and budgetary restrictions and secure the necessary approvals for payment processing.
* **Accounting**: To track costs, monitor budgetary performance, and assist with financial reporting, keep thorough records of all procurement transactions, including purchase orders, invoices, receipts, and payment approvals.

In addition, the procurement plan for the SketchUp project calls for hiring vendors, buying laptops and electronic accessories, and giving current employees working on Solid Works in Toronto, 2024, a basic hardware training course. The project team is also responsible for choosing a vendor to help with different parts of the software acquisition process, such as software selection, licensing and price negotiations, implementation, configuration, report generation, and training. The creation of a procurement management strategy and plan for the new software rollout right after the relocation is finished has been expressly requested by the IT Director.

After the relocation is finished, Solid Works can successfully acquire, install, and launch the new software by actively working with the project team to carry out these duties, improving operational efficiency and supporting organizational growth objectives.

## **PROCUREMENT PLAN DEFINITION**

## **Procurement Overview**

The impending relocation of the IT Support & Services Department (ISSD) to a new location within 8 months has catalyzed the initiation of the SketchUp project. This project is strategically designed to identify, procure, and implement new software solutions tailored to the industry's unique needs. With a workforce of over 1,000 current employees, the project underscores the critical need for software that not only enhances operational efficiency but also seamlessly aligns with organizational objectives, thereby ensuring smooth transition and continuity of services.

**Key Components of the SketchUp project:**

*Purchase:*

The procurement process involves meticulous selection and acquisition of software solutions that resonate with the specific needs and challenges faced by the IT Support & Services Department. It encompasses thorough market research, vendor evaluations, and negotiation of contracts to secure the most suitable software solutions for the department's requirements.

*Back-up and Migration of Data:*

A thorough plan for backing up and moving data from the old laptops to the new ones is essential to ensuring a smooth transition to the new laptops. This entails minimizing the risk of data loss or corruption by guaranteeing the security and integrity of sensitive data during the migration process.

*Installation of Laptops and Peripherals:*

The installation process entails setting up the new laptops and peripherals at user desks in the new location. This includes unpacking the equipment, configuring hardware components, and ensuring proper connectivity to the network and other essential systems.

*Training Facilitation:*

One of the main components of the SketchUp project is providing staff with extensive training on how to use the new laptops and accessories. The purpose of these training sessions is to acquaint staff members with the features of the new hardware and software, enabling them to effectively utilize technology in their daily work.

2.2. **Procurement Description**

In order to enable the IT Support & Services Department (ISSD) to move to its new location with minimal disruption, the SketchUp project procurement process comprises a thorough investigation and acquisition of resources. This comprehensive description covers a wide range of procurement-related topics, such as services, software, hardware, and training, with the goal of maintaining operational effectiveness and continuity throughout the relocation process.

**Specific Computer Requirements:**

A total of 1000 sets of laptops and peripherals

*Laptop for Graphic Designers:*

Processor: Intel Core i7 or AMD Ryzen 7

RAM: 16GB DDR4

Storage: 512GB SSD or higher

Display Resolution: Full HD (1920 x 1080) or higher, with IPS panel.

Graphics Card: NVIDIA GeForce GTX 1650 or higher

Compatibility: Adobe Creative Suite, Photoshop, Illustrator, InDesign

Laptop for Support Staff Managers:

Processor: Intel Core i5 or AMD Ryzen 5

RAM: 8GB DDR4

Storage: 256GB SSD

Display Resolution: Full HD (1920 x 1080)

Compatibility: Microsoft Office Suite, CRM Software, Helpdesk Applications

Laptop for Software Developers:

Processor: Intel Core i7 or AMD Ryzen 7

RAM: 32GB DDR4

Storage: 1TB SSD

Display Resolution: Quad HD (2560 x 1440) or higher.

Graphics Card: NVIDIA GeForce GTX 1660 Ti or higher

Compatibility: IDEs (Integrated Development Environments) like Visual Studio, IntelliJ IDEA, Android Studio

Laptop for Front Desk Workers:

Processor: Intel Core i3 or AMD Ryzen 3

RAM: 8GB DDR4

Storage: 256GB SSD

Display Resolution: HD (1366 x 768)

Compatibility: Web browsers, Microsoft Office Suite, Customer Management Software

Laptop for Security Staff:

Processor: Intel Core i5 or AMD Ryzen 5

RAM: 16GB DDR4

Storage: 512GB SSD

Display Resolution: Full HD (1920 x 1080)

Compatibility: Security Monitoring Software, Access Control Systems, Incident Reporting Tools

These specifications are tailored to the specific requirements of each role within the organization, ensuring that employees have the necessary computing power and features to perform their tasks efficiently and effectively.

*Colors:*

Preferred colors may include standard options such as black, silver, and gray, as well as variations to suit user preferences or departmental aesthetics.

*Sizes:*

Standard sizes may include 13-inch, 15-inch, and 17-inch options, providing flexibility in terms of portability and screen real estate based on user requirements.

**Specification Accessories:**

Accessories such as laptop bags, docking stations, external monitors, keyboards, and mice should meet specific specifications to enhance user productivity and comfort.

Laptop bags should feature durable materials, padded compartments for device protection, and ergonomic designs for comfortable carrying.

Keyboards and mice should offer ergonomic designs, responsive keys/buttons, and wireless connectivity options for improved usability and comfort during extended use.

**Licenses:**

Common license types include Named User Licenses, which are assigned to specific individuals, and Device Licenses, which are tied to individual devices. Additionally, Site Licenses may be acquired for broader usage across the organization, allowing multiple users or devices access to the software within a specified location or network. It's crucial to ensure compliance with licensing agreements, track license usage accurately, and renew licenses promptly to avoid interruptions in operational continuity and potential legal ramifications.

**Implementation and Configuration of the Software:**

By February 12th, 2024, the software must be successfully installed and configured to match the department's workflows and procedures. In order to maximize effectiveness and productivity, this entails adjusting settings, integrating with current systems, and optimizing performance. For a period of five years, the prices of the goods and services will not change.

To sum up, the SketchUp project is a strategic initiative that aims to use technology to improve organizational growth and operational efficiency. The IT Support & Services Department works to make sure that the move to the new location goes smoothly and that new software solutions are seamlessly integrated into its operations by carefully attending to every aspect of the project.

## **Procurement Process**

2.2. **Procurement Process**

In the context of the SketchUp project, encompassing a timeframe of 8 months and involving a workforce of 100 employees, the Procurement Process orchestrates the strategic acquisition of essential resources vital for the seamless transition of the IT Support & Services Department (ISSD) to its new location. This stringent procedure involves careful planning, stakeholder collaboration, and adherence to best practices in order to acquire software solutions that precisely match the needs of the department and improve operational efficiency.

|  |  |  |  |
| --- | --- | --- | --- |
| S.N. | Stakeholders | Stakeholder Requirement | Stakeholder Type |
| 1 | IT Director | Approval of procurement budget | Executive |
| 2 | ISSD Director | Overall project oversight and direction | Executive |
| 3 | Procurement Manager | Implementation of procurement strategy | Management |
| 4 | Vendor Representatives | Fulfillment of contractual obligations | External |
| 5 | Finance Department | Budget allocation and expenditure tracking | Internal |
| 6 | Legal Department | Review and approval of contract terms | Internal |
| 7 | IT Support Team | Integration of new software into systems | Internal |
| 8 | End Users | Feedback on software usability and needs | Internal |
| 9 | Project Manager | Coordination of procurement activities | Management |
| 10 | Training Coordinator | Organization and execution of training | Internal |

**Acquisition Procedure:**

*Identification of Requirements:*

Determine the software needs based on feedback from the project manager, IT support staff, and end users.

*Market Research:*

Perform in-depth market research to find possible suppliers and assess available software.

*Choosing a Vendor:*

Request proposals from chosen suppliers, then evaluate each one's suitability according to features, cost, and support offered.

*Risk Assessment of the Proposal:*

Select the vendor providing the best solution by comparing vendor proposals to predetermined standards.

*Preparing the Procurement Document*

The creation of the procurement document functions as a thorough plan for obtaining the software solutions required for the SketchUp project.

*Specifications and Requirements in Detail*:

To do this, the software's functional and technical requirements, including its features, functionalities, performance metrics, and compatibility with current systems, must be spelled out in detail.

*Conducting Procurement*:

Timelines outline important dates and benchmarks for each step of the procurement process, such as contract negotiations, software installation, vendor selection, and user training. Having well-defined timelines facilitates the management of project schedules, efficient resource allocation, and the timely completion of crucial tasks, thereby reducing delays and disruptions.

*Setting Up Criteria for Evaluation*:

A systematic framework for evaluating vendor proposals and choosing the best option is provided by the evaluation criteria.

*Contract negotiation and vendor selection:*

The criteria that will be used to assess vendor proposals are laid out in the procurement document, which directs the vendor selection process. It describes the procedures for requesting and evaluating proposals, evaluating potential vendors, and choosing the best vendor based on preset standards. This includes the product price, quality, past experiences, ethics and integrity & Existing Relationships.

*Facilitating Seamless Software Acquisition and Implementation:*

By providing a comprehensive framework for procurement, the document streamlines the acquisition and implementation of software solutions.

*Negotiation of Contracts:*

Together with the chosen vendor, negotiate the terms of the contract and pricing, making sure that they meet organizational needs and budgetary restrictions.

*Managing and concluding the procurement including acceptance criteria:*

Complete contracts, including terms and conditions, payment plans, and service level agreements, with chosen vendors.

*Planning for Implementation:*

Create a thorough implementation plan that includes software deployment deadlines, milestones, and roles.

*Instruction and Distribution:*

Plan end-user and IT support staff training sessions to guarantee a seamless transition and efficient use of the new software.

## Procurement Risk Analysis

Potential risks, their effects, and strategies for mitigating them are assessed in the procurement risk analysis in order to protect the SketchUp project from setbacks and guarantee the successful acquisition and deployment of software:

|  |  |  |
| --- | --- | --- |
| Risks | Consequences | Mitigation |
| Vendor Reliability | Delayed delivery, substandard products | Perform thorough vendor background checks. |
| Budget Overruns | Financial strain, project delays | Develop contingency plans, monitor expenses. |
| Compatibility Issues | System integration failures | Conduct compatibility tests, pilot phases. |
| Scope Creep | Project scope expansion | Establish clear scope boundaries, change control procedures. |
| Technical Challenges | Implementation setbacks | Engage technical experts, conduct risk assessments. |
| Regulatory Compliance | Legal penalties, reputational damage | Stay updated on regulations, seek legal counsel. |
| Staff Resistance | Low user adoption, productivity loss | Provide comprehensive training, address concerns proactively. |

## Selection Criteria and Response Evaluation

In the Selection Criteria and Response Evaluation process, specific criteria are established to assess vendor proposals and select the most suitable solution for the SketchUp project. Here's a breakdown of the process using two tables:

The Selection Criteria and Response Evaluation process involves defining clear criteria for evaluating vendor proposals and determining the best-fit solution for the SketchUp project. By systematically assessing responses against predefined criteria, the project team ensures informed decision-making and alignment with organizational objectives.

Selection Criteria and Response Evaluation

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Table 1: Selection Criteria

|  |  |
| --- | --- |
| **Criteria** | **Description** |
| Functionality | Assessing the software's features and capabilities in meeting project requirements. |
| Cost | Evaluating the overall cost, including licensing, implementation, and maintenance fees. |
| Vendor Reputation | Reviewing the vendor's track record, reliability, and customer satisfaction ratings. |
| Support Services | Examining the quality and availability of vendor support, training, and troubleshooting services. |
| Scalability | Assessing the software's ability to scale with organizational growth and evolving needs. |

All vendor applicants must meet the above-mentioned basic criteria to be eligible for the selection process. Vendors must clearly understand the procurement requirements for this project, likewise, vendors are responsible for any kind of risk associated with the on-time completion of the supply, for any support required from our company, vendors shall communicate instantly. Professionalism from the vendor side is the key to successfully completing this project, they should practice professional communication, professional documentation, and professional procurement processes. Quality product is the main concern for the team, no quality compromises shall be entertained. The vendor will not be able to change the prices once the contract is done so it is urged to submit the cost documentation accordingly. The criteria scoresheet for the selection of the vendor is displayed below:

Table 2: Response Evaluation Scorecard

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Proposal | Functionality | Cost | Vendor Reputation | Support Services | Scalability |
| Vendor A | High | Moderate | Excellent | Good | High |
| Vendor B | Moderate | Low | Good | Excellent | Moderate |
| Vendor C | Excellent | High | Moderate | Moderate | Excellent |

In the Response Evaluation table, each vendor proposal is assessed based on predefined criteria, allowing for a comparative analysis of their strengths and weaknesses. Through this systematic evaluation process, the project team can make informed decisions regarding vendor selection, ensuring the acquisition of a solution that best meets the project's requirements and objectives.

## Estimated Budget

The budget estimation sheet for the procurement project is shown below:

***Below is the estimated budget for the SketchUp project, including a 10% tax:***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item | Quantity | Per Unit Price ($) | Total Cost ($) | References |
| Software Licenses | - | - | 50,000 | Vendor Quotes, Market Research |
| Implementation Services | - | - | 30,000 | Vendor Quotes, Market Research |
| Training Sessions | - | - | 20,000 | Training Providers, Market Research |
| Hardware Upgrades | 100 | 400 | 40,000 | Vendor Quotes, Market Research |
| Laptops | 100 | 800 | 80,000 | Vendor Quotes, Market Research |
| Miscellaneous Expenses | - | - | 10,000 | Project Management Estimate |
| Tax (10%) | - | - | 158,960 | Tax Regulations, Government Guidelines |
| Total Budget (including tax) | - | - | **1,589,500** |  |

**Resources for budget estimation:**

* Best Buy Canada (2022): *Computer Accessories.* <https://www.bestbuy.ca/en-ca/category/computer-accessories/20001a?cmp=knc-c-71700000057204549-k-43700067794043263&gclid=Cj0KCQjwy5maBhDdARIsAMxrkw1jSqRfiXtDoZwYWdMsJB7L1F2JtFQz6xfX7cLzP7AvUxNp4ZOBgWkaAueZEALw_wcB&gclsrc=aw.ds>
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## Contract Type and Standards

Correct use of procurement contracts is very crucial for this project. In the context of the SketchUp project, selecting the appropriate contract type and incorporating common contract clauses are essential for ensuring the successful execution of the procurement process and the subsequent implementation of the software solution. Here's how these aspects relate to the project:

**Contract Types:**

*Fixed-Price Contract*: According to Luitink et al. (2016), this type of contract may be appropriate for obtaining certain components of the software solution, such as licensing costs or particular implementation services with clearly defined scopes. It gives the company cost certainty and motivates suppliers to meet deadlines and budget requirements.

*Cost-Reimbursable Contract:* This type of agreement may be more suitable for project components like customization or extra support services, where the scope is less clear or subject to change (Luitink et al., 2016). This kind of contract guarantees that the company will only be charged for actual expenses incurred and provides flexibility in accommodating changes.

*Time and Material Contract*: According to Luitink et al. (2016), this type of contract can be used for services where the amount of work needed varies over time, like technical support or training sessions. It offers adaptability in the use of resources and permits modifications in response to changing project requirements.

*Unit Price Contract*: Under this type of procurement, the organization pays a set price per unit for certain items like peripherals or hardware upgrades. This method guarantees uniformity in prices for comparable items and streamlines pricing computations.

**Common Contract Clauses:**

*Scope of Work:* Clearly stating the work's parameters guarantees that the vendor's deliverables and the organization's requirements are in line. This is essential for defining the software solution's functionalities, requirements for customization, and requirements for integration.

*Payment Terms*: Clearly defining payment terms promotes timely payment to vendors and aids in the management of financial obligations. Setting up deliverables or milestones that result in payments is crucial for maintaining accountability and encouraging on-time delivery.

*Intellectual Property Rights:* Taking care of intellectual property rights guarantees that any improvements, modifications, or exclusive solutions created during the project remain the property of the organization. In addition to safeguarding the company's interests, this promotes innovation and growth in the future.

*Confidentiality*: By including confidentiality clauses, you can protect sensitive information—like financial information, proprietary data, or strategic plans—that may be shared during the procurement process. It stops unauthorized disclosure of private information and builds trust between the company and the vendor.

*Termination Clause:* Clearly stating the terms of termination enables the company to end the agreement in the event that a vendor defaults, there are contract violations, or unanticipated events occur. This offers a way to control risks and safeguard the interests of the company.

The company can reduce risks, set clear expectations, and promote productive vendor collaboration during the procurement and implementation stages by implementing contract types and clauses that are appropriate for the SketchUp project.

## APPROVALS

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Project Manager

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Project Sponsor

Approval Date \_\_\_\_\_February 10, 2024\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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