

Strategic Interventions
Financial System Implementation
Available Project Staffing

The directors have agreed that up to five individual employees will be made available as project team members on a part-time or full-time basis. Their total utilization cannot exceed 4 FTE at any point. As the project manager, you can determine which employees and skill sets you need most and request those employees. You must request specific people, and you can use only those people for the duration of the project. So, for example, if you choose two people who are each available 50% of the time, you can request only three other employees. However, those other employees can be made available full time. If you choose two people who are each available 25% of the time, you will still be limited to only three other people. If you choose four part-time team members who total only 2 FTEs, you can still choose only one more person. You can use less than someone's availability, but you cannot exceed it – so, for example, if one of your team members is available 50% of the time, you can use them for only 20% or 30% of the time in a given week, but you can never use them for 60% of the time.

This is an important decision for you: this project will be watched closely. While there is not a specific budget allocated for the internal labor costs of implementation, it would be a career-enhancing move for you to maintain a low-cost structure, and you will be expected to monitor the internal costs.

The preferred completion dates the directors have set are competing priorities. The goal is to have the entire system installed and ready for cutover on January 1st. The top priority would be to have any modules that drive tax reporting, such as payroll or the general ledger, finished before the end of the fiscal year on December 31st. If the budget module is part of the original roll-out, it would be more useful if completed before December 1st, so that budgets for the upcoming fiscal year can utilize the capabilities. The other modules can convert at any point.

The FinanceMaster team has a firm contract for module implementation. Once the internal project implementation team has finished work on the business requirements for a module, the customization, modification and interfaces will be finished within three weeks, ready to load converted data. They will convert and load data within the two subsequent business days. Their practice is to staff to whatever level necessary to meet their deadlines. If they are contracted for training, their trainers and materials will be ready to go no later than two weeks after implementation.

The skills required for project tasks break down into 3 types: general operations, accounting and project accounting/billing. The HR director has identified the skill level in each area for each employee as beginner, experienced, or expert. The potential project team members are:

Donna Donato, Controller: Donna is expert in accounting, experienced in project accounting/billing, and a beginner in general operations. Her hourly rate is \$100/hour. She is available only 25% of the time.

Mary Gates, Accountant: Mary is experienced in accounting and a beginner in both other areas. She is available 50% of the time, and her hourly rate is \$60/hour.

Practice Group Administrators: Any of the five can be available for up to 50% of the time if need be, but no more than 1 FTE can be requisitioned. They are all beginners in accounting, experienced in general operations, and expert in project accounting/ billing. Their hourly rates are \$80/hour. Their names are:

Jan Brewer

Kevin Hooks

Scott Day

Jane Landsell

Miriam Karpack

General Administrative Staff: Up to 3 FTE can be requested from the 5 general support staff members. They are beginners in every area. Their hourly rate is \$20.

Senior Analysts: The directors are willing to make some senior analysts available on an hourly basis to provide project accounting/billing support only. They are expert in project billing. Up to 8 hours a week can be requisitioned, and a maximum of 2 analysts in any given week can be utilized. No more than 80 hours in total of senior analyst time may be utilized. Their hourly rate of \$150 would apply. Each 8 hours counts as .2 FTE. They can be utilized in addition to the five employees, but their FTE equivalents must be counted in, and cannot cause the total time utilization in a given week to exceed 4 FTE for the entire group.

You must identify the project team by name at the time of presenting the project plan for approval.