

TBM SOW Concierge Program & 2023 Year End

DEILLE WAGNER, JANIS RAMIREZ



TBM SOW Concierge Program

Overview & Proposed Solution

Why	BVM, GSM and AMPO received feedback related to the 2023 annual process of IT Labor SOW and resource renewal that the process was complex and difficult to navigate.
Proposed Solution	In partnership with BVM, GSM, and AMPO a customized support service was designed to manage the 2024 annual process of IT Labor SOW and resource renewals to guide each Technology Team through this journey in a phased approach.

Impacted Customers	Action for the Customer <small>(Bold Applicable Selections. Customize as Needed)</small>	Action is <small>(Bold Applicable Selections. Customize as Needed)</small>
PMOs	Training Needed	Mandatory
SOW Owners and Leadership	Stay Informed	Recommended



TBM SOW Concierge

Providing support and improvements to our Year-End Activities



CM Leads Management (Bold Applicable Selection)

Owner	Janis Ramirez
Awareness Discovery Approval	Checkpoint 1 Checkpoint 2 Checkpoint 3

Change Management Strategy (Bold Applicable Selections. Customize as Needed)

CM Leads call
Web component
#ampo-sdlc-help
Email communication

AMPO Year-End Information Center updated

The [AMPO Year-End Information Center](#) has been updated with 2023/2024 dates. Please take time to review and share as needed.

Note the changes compared to previous years:

- Sections by topic
- Expand the key dates sections for details
- PDF to follow


2023 YEAR-END INFORMATION CENTER

SOW & Resource Management Timeline	Clarity Time Sheet Deadlines and Key Dates
Oct. 9, 2023 - TBM SOW Concierge Activities -	Oct. 21, 2023 - December Timesheets available +
TBM SOW Concierge Activities	
◦ Introduction of TBM SOW Concierge Consultants	
◦ Demo of Dashboard & 2023 Roster Review between TBM SOW Concierge Consultants & PMO team member	
Oct. 9 - 13, 2023 - PMOs Review their Rosters +	Dec. 1, 2023 - Approve All Timesheets through Year-End +
Oct. 16, 2023 - PMOS submit 2024 SOWs +	Dec 13, 2023 - Submit WIP Requests +
Oct. 31, 2023 - Target date for SOW Submissions +	Dec. 21, 2023 - Last day for Timesheet Approvals & Updates +
Nov. 1, 2023 - SOW Processing, Start of Profile Updates +	Dec. 22, 2023 - Clarity Locks for Year-End Processes +
	Dec. 23, 2023 - Clarity Unavailable +
	Dec 27, 2023 - Jan 8, 2024 - Time Entry Locked +
	Jan. 8, 2024 - Time Entry Unlocked +
Clarity Project Updates Key Dates	Partnering with Kyndryl Services: Key Points
Oct. 27, 2023 - Submit PMDB OPCs +	Year-End 2023 +
Nov. 10, 2023 - Submit OPCs through Year End (BoY) +	New 2024 Work +
Dec. 13, 2023 - Update or Create Clarity Projects +	

Resources for the TBM SOW Concierge Program, p. 1

- [TBM SOW Concierge Program page](#) updated with
- [TBM SOW Concierge Portfolio Partner by TLT](#) created to ensure
- [Statement of Work Template Selection Guide](#) updated to

Expected Outcomes




Promote continuous education and PMO support

TBM SOW Concierge Portfolio Partner by TLT

Contractor Onboarding and Invoicing Life Cycle


#ampo-pmo-support




Improve and standardize processes

Statement of Work Template Selection Guide

Fixed Bid Guidelines



Enhance customer experience



Compliance to IT Labor guidelines and governance requirements

AEMP01 External Expenditure Approval Policy

AEMP10 Third-Party Management Policy

Entity Owners for Statement of Work (SOWs) - October 2023

TBM SOW Concierge Portfolio Partner by TLT						
Technology Leadership Team (TLT)	PMDB Department	VP	Portfolio Director	BPS SOW Concierge Consultant	Program Leads	
Allegra Driscoll	GCS Tech & Kabbage Tech	All Others	Rachel Lynes	Julie Ann Guerrero	Maria Amparo Teano & Deille Wagner	
Gary Kensey	GSGT / GSGT Corp Tech Exec Office	All Others	Victoria Alcantara	Via Karalyn Arceno	Kanika Saluja & Elizabeth Korenek	
	FDE	Alin D'Silva		Melissa Mesina		
	GRC Technology	Ted Hackman				

Statement of Work with these key IT Labor Vendors

ATOS SYNTel INC
BC Forward
CBTS
Cognizant Technology
Diversant LLC

IBM EB Resource Strategy
Impetus
Infosys Technologies Limited
IntraEdge
LTMindTree

M3BI
TCS-Tata Consulting Svcs Ltd
Technogent (Thomas Galloway)
TEKSystems

For Statements of Work, new or amendments, with these approved vendors, select a template according to the engagement type:

Time & Material
or
Team as a Service Fixed Bid (aka OBA) engagements

Milestone Based
Fixed Bid Agreements (aka OBA)

Build, Operate, Transfer (BOT)
Fixed Bid Agreements (aka OBA)

Click here for the template:

Click here for the template:

Click here for the template:

Service Description Form (Rev. Sept.14 2023)

Milestone Based Agreement

Build, Operate, Transfer (BOT)

Exception: Use the Standard SOW Template

For any Fixed Bid SOWs with TCS, if the total SOW value is above \$500k.

For any Management Consulting Engagements.

Statement of Work with Other Vendors

If your Statement of Work is with any Vendor not already mentioned above for

Time & Material
or
Team as a Service Fixed Bid (aka OBA, formerly Periodic Payment) or for any other engagement

Milestone Based
Fixed Bid Agreements (aka OBA)

Build, Operate, Transfer (BOT)
Fixed Bid Agreements (aka OBA)

Select the new or amendment template:

Click here for the template:

Click here for the template:

Standard SOW Template

Milestone Based Agreement

Build, Operate, Transfer (BOT)

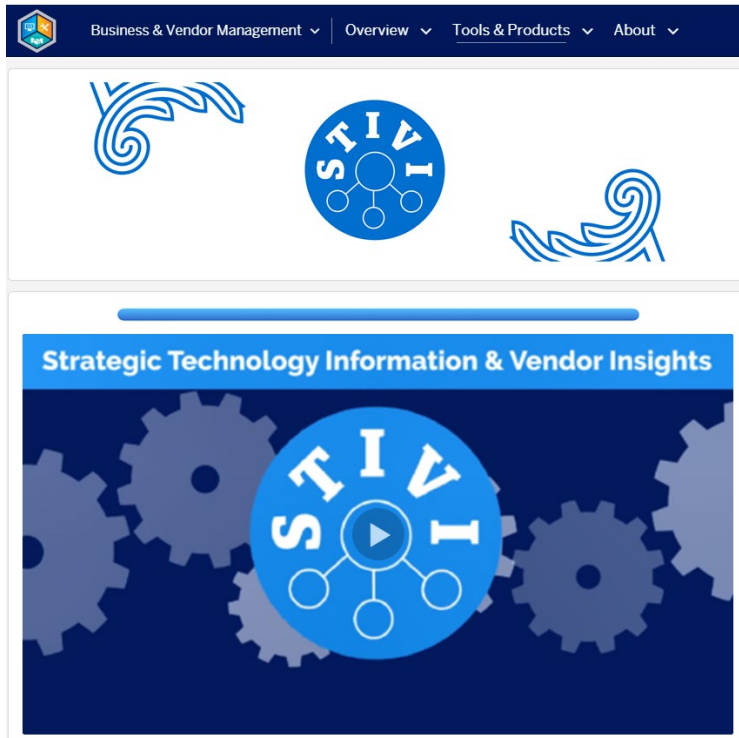
Standard SOW Amendment Template

See also **Fixed Bid aka Outcome Based Agreements (OBA)** and **Fixed Bid Guidelines** for details regarding Fixed Bid Agreements (Team as as Service, Milestone Based, or Build, Operate, Transfer) and requirements.

5

Resources for the TBM SOW Concierge Program, p.2

- STIVI Rate Cards are updated.



- BVM refreshed the Fixed Bid process. For details see [Fixed Bid](#)

Expected Outcomes		
	EFFICIENCY & CONTROL	<ul style="list-style-type: none">• Provide cost savings over T&M models and promote strategic vendor consolidation• Defined process and controls
	FASTER DELIVERY	<ul style="list-style-type: none">• Drive faster delivery by developing clear requirements• Improve vendor accountability
	RECRUITMENT CHANNEL	<ul style="list-style-type: none">• Create new recruitment/conversion channels• Support Workforce Strategy's colleague vs contractor targets
	NEW CAPABILITIES & LOCATIONS	<ul style="list-style-type: none">• Utilize vendor resources to build capabilities in new locations• Support Technology Location Strategy

- Entity Owners for Statement of Work

Phase	Policy	Date
 Onboarding	<ul style="list-style-type: none">• Changes to Approved Supplier Lists for IT Labor	<ul style="list-style-type: none">• 05-10-21
	<ul style="list-style-type: none">• New DE&I Suppliers Now Available	<ul style="list-style-type: none">• 08-12-21
	<ul style="list-style-type: none">• New Recruitment Channel: Deploy to Hire	<ul style="list-style-type: none">• 09-07-21
	<ul style="list-style-type: none">• Hire Is Live for Tech Contractor Engagement	<ul style="list-style-type: none">• 02-14-22
	<ul style="list-style-type: none">• Role Inconsistencies Between Hire and PMDB Onboarding	<ul style="list-style-type: none">• 08-31-22
 Contractor Management	<ul style="list-style-type: none">• Entity Owners for Statement of Work (SOW) Guidelines	<ul style="list-style-type: none">• 10-03-23
	<ul style="list-style-type: none">• Help with Contractor Fraud	<ul style="list-style-type: none">• 01-20-20
	<ul style="list-style-type: none">• PROHIBITED COUNTRIES for WORKING WHILE on PERSONAL TRAVEL	<ul style="list-style-type: none">• 06-02-23
	<ul style="list-style-type: none">• Contactor Cross-Border Temporary Remote Working While on Personal Travel	<ul style="list-style-type: none">• 04-20-22
	<ul style="list-style-type: none">• Vendor Transfer Policy	<ul style="list-style-type: none">• 09-04-22
	<ul style="list-style-type: none">• Elimination of Vaccine Requirement - U.S., Canada, Australia, & New Zealand	<ul style="list-style-type: none">• 10-19-22
	<ul style="list-style-type: none">• Update on Amex Flex for Contractors Returning to India Offices	<ul style="list-style-type: none">• 01-11-23

Fixed Bid IT Labor Guidelines (aka OBA)

Fixed Bid Guidelines	Team as a Service (TaaS) / Periodic Payment	Milestone Based Agreement	Build, Operate, Transfer (BOT)
All exceptions must be approved by GSM and/or Business & Vendor Management *All Fixed Bid resources must be onboarded via Hire.			

Benefits of TBM SOW Concierge Program

The concierge program is designed to provide proactive guidance and additional support capabilities throughout the coming year-end process. Our mission is to enhance the customer journey by providing end-to-end SOW & resource set-up oversight, enabling continuous education, and promoting optimal vendor footprint in Technology.

Streamlined Service • *Consultation* • *Knowledge Share*

Varying engagement and readiness for annual IT Labor SOW's and resource profile updates in Clarity.

Unclear interpretation of SOW policies and communications resulting in delay of SOW approvals and higher than necessary SOW volumes.

Manual effort and labor-intensive process to gather the SOW and resource level data.

