



STRATEGIC BUSINESS PROPOSAL

IMPROVING KNOWLEDGE MANAGEMENT PRACTICE

INTRODUCTION

Business – IT Alignment is a key factor of successful enterprises, especially in service industry. The harmony between business goals and IT infrastructure does not only require technical expertise in design and implementation, but also demand agile organizational change management.

As an assignment of KIT708 – ICT Systems Strategy and Management, this strategic business proposal is designed by Group 40 to help 2PM Services, a young consulting firm based in Hobart, overcome the problems they are facing and earn their business goals.

This proposal will first provide an overview of 2PM Services and their current business status. Strategy analysis tools (SWOT, GAP Analysis) will be used to highlight the problems that 2PM are facing and how they can tackle those issues. Due to limited resources and the context of the organization, the scope of the problems being solved in this proposal will be limitedly selected and explained. Finally, a comprehensive implementation plan for enhancing 2PM's application portfolio will be presented.

The solution is expected to help 2PM improving the following fields of their business operation: Project management, Human resource management, Collaboration, Communication and Knowledge management.



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TEAM MEMBERS



NGHI VO(LEADER)

Manage the project progress
Company overview and business analysis (SWOT, GAP)
Defining problems and setting solution boundaries
SCORO Implementation Plan



YANRU ZHAO

Collaboration platform solution
Central repository solution
Improve the Microsoft portfolio



XIANGNING YAN

Collaboration platform solution
Central repository solution
Knowledge management solution



QIANYING WANG

All-in-one Project management solution
Human resources management solution
Microsoft Delve analysis



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The Company

2PM services is a Hobart based practice that provides professional project management, business analysis, communications, process and change services



Website: <http://2pmservices.com.au/>
Email: hello@2pmservices.com.au

A CLOSER LOOK



HISTORY

Established October 2015

An award winning Hobart based practice that provides professional project management, business analysis, communications, process and change services

Currently, 2PM team consists of 20 members (15 FTE)



AWARD



Skype for Business



Driving better business outcomes through the creative application of the right people, processes and technology

Exceptional project services and solutions to meet our information technology, business processes & project management requirements.

Our consultants ask the right questions and are passionate about creatively solving problems and delivering results

WHAT WE DO



Project services



Business Improvement



ICT Advisory



Organizational Change



Training Services

NEW



ICT Services



Creative Services

our mission

At 2PM, it's people that makes us tick
We value relationships and we're passionate about
helping others succeed



our vision

To become a leading provider of
professional services in Australia through
changing mindsets and delivering projects
that make a difference

DIRECTOR

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JASON GORMAN

INTRODUCTION

Jason is a professional manager and IT specialist with over 23 years experience over a broad range of technologies: IT infrastructure, Software Development, Project Management, IT Support & Data centre.

Jason is the founder and managing director of 2PM Services since 2015

EXPERIENCE



IT Infrastructure



Software Development



IT Support & Data



Project Management

SENIOR MEMBERS

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JAMES HORTON

Partner
Director of Eighty Eight Solutions

James' approach involves strong collaboration across both business operational and technology departments to build a solution that delivers tangible business benefits against the investment in IT



TIM HYNES

Senior Project Manager

Tim is a career project management professional specialising in delivering information management solutions in the health care industry. Tim has worked for public, private and not for profit organisations



CLAIRE TUBMAN

Senior Project Manager

Claire is an experienced professional with specific expertise in the higher and vocational education sectors in a broad range of project, marketing and communication roles.



MARYANN HERBERT

Senior Project Manager

MaryAnn is a highly skilled Senior Project Manager with 20+ years of experience delivering full life-cycle projects on-time and on-budget for Utilities, Financial Services, Health, Education and Non-Profit industries.

TEAM MEMBERS

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MATT ABBOTT
Project Manager



ROBERT BEAR
ICT Specialist



ABBY BENNETT
Project Manager



LINDA BRITTS
Senior Specialist



MITCH DOLAN
Project Manager



ED HEFFORD
Business Analyst



GEORGINA HOLMES
Project Administrator



MELISSA WAGNER
Senior Consultant

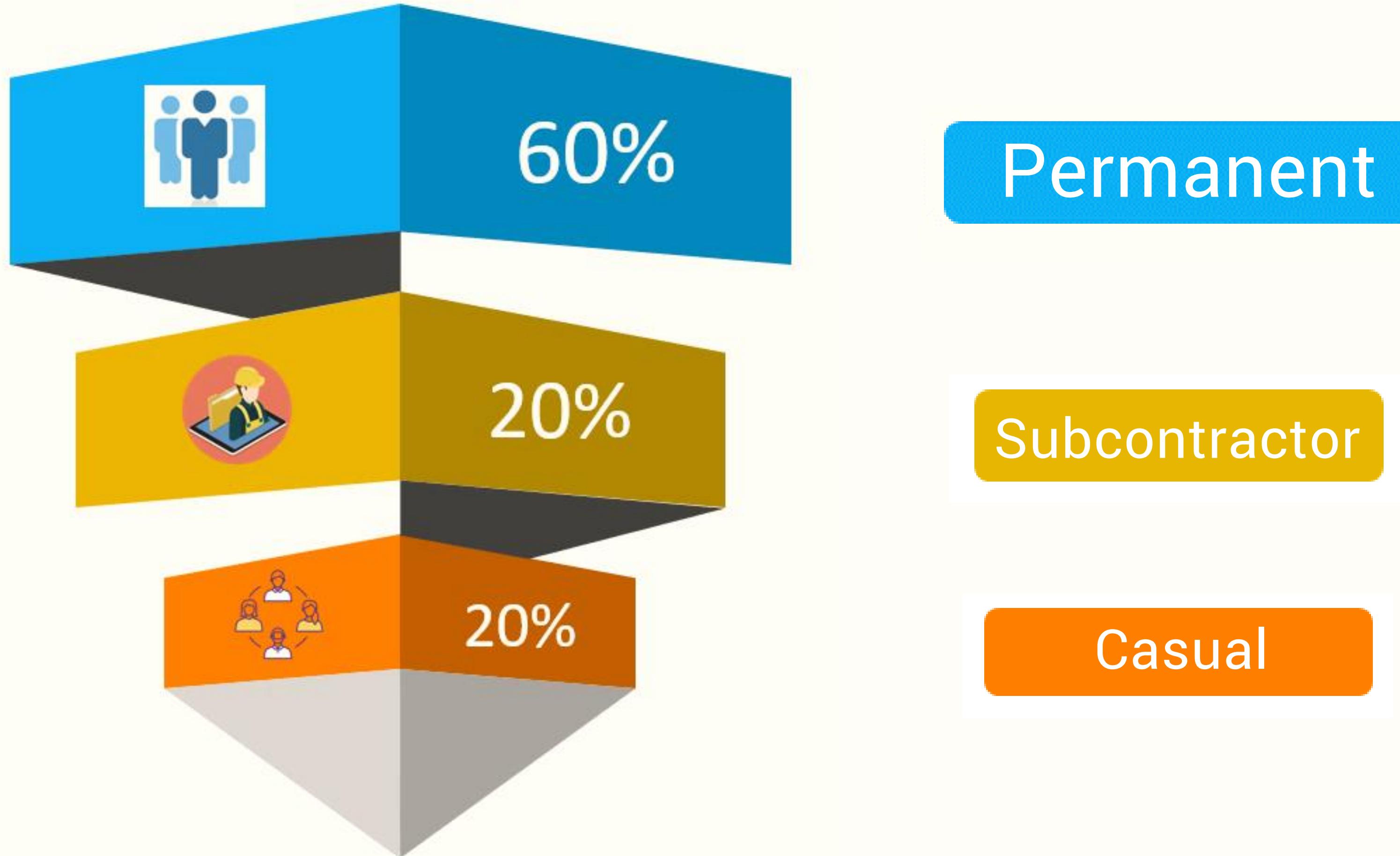


KEN WEBSTER
IT Advisory

2PM's people are outcomes-focused, adaptable, reliable, and are able to engage with clients to provide effective solutions to their business and IT problems.

TEAM COMPOSITION

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2PM's a fast-growing business. In July 2018, the team consists of 20 members (15 FTEs). The total team size is expected to grow by 25%/year for the next 3 years. The % of permanent staff is targeted to maintain at 60%.

— — — — —

A company structure with largely permanent staff enables 2PM to achieve:

Consistency in services quality

Maintain good company culture

STRATEGIC PILLARS



People

At 2PM it's people that matters the most
2PM is keen on building relationships and we're passionate about assisting people succeed

1

Cusomters

Your success is our success.
2PM is motivated and passionate about giving the best solutions and meaningful outcomes to customers

2

Systems

On time, on budget, Advanced governance, project methodologies and frameworks enable 2PM to deliver reliable and outstanding results

3

Services

2PM always offers the unique services with outstanding quality that the customer needs to deliver better business outcomes

4

2PM'S CORE VALUE



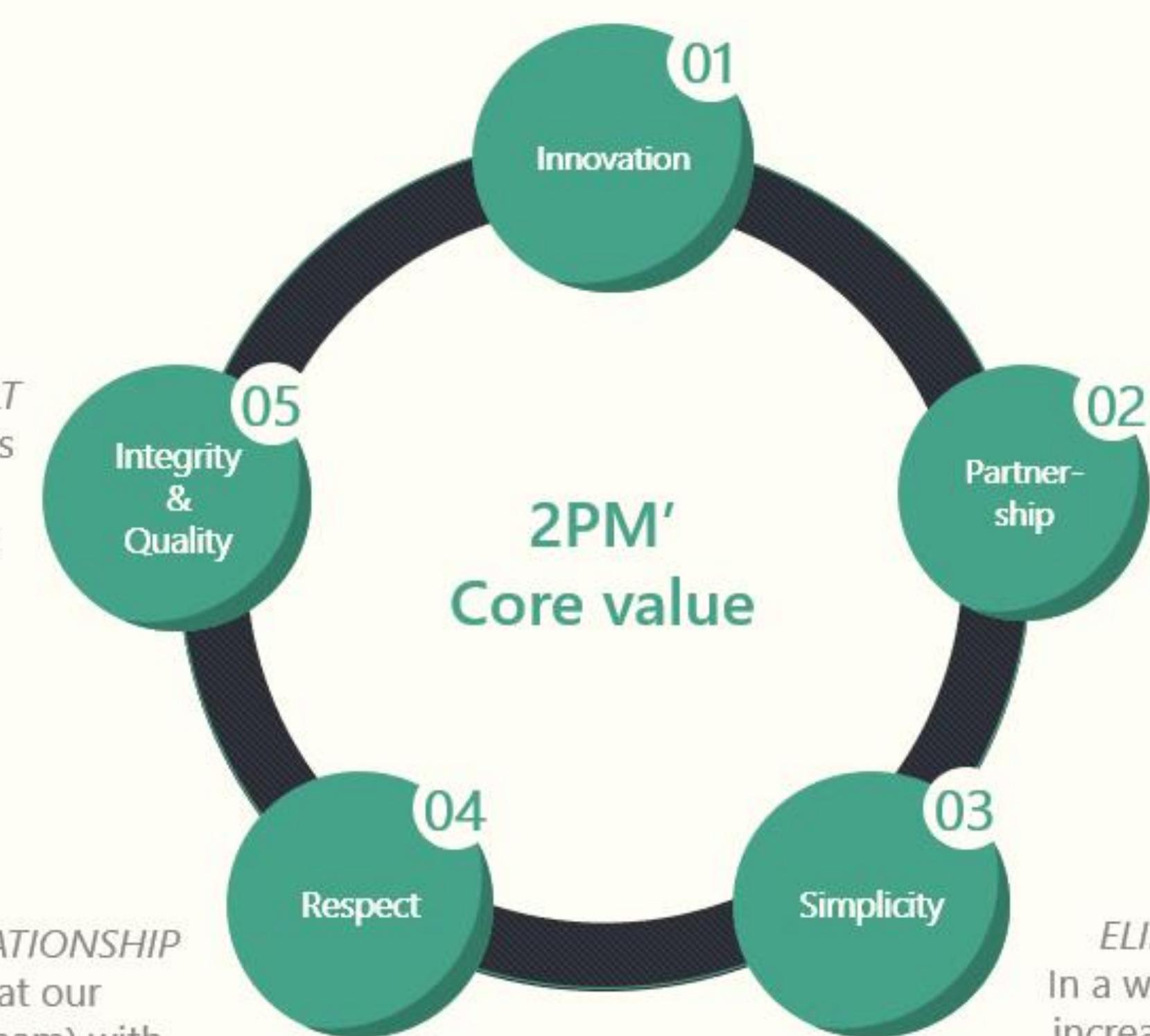
As a young consulting firm, 2PM Services is very employee-centric and customer-centric.

The core value aligned well with the strategic pillars and company mission. The strategic pillars guides 2PM's operational activities and strategic planning, utilizing the core values to achieve the business goals

DELIVER OUTSTANDING RESULT
We're passionate and relentless about delivering value. We achieve superior business results by stretching our capabilities.

FOSTER REAL RELATIONSHIP
We aim to treat our customers (and team) with the respect, honesty and integrity that they deserve

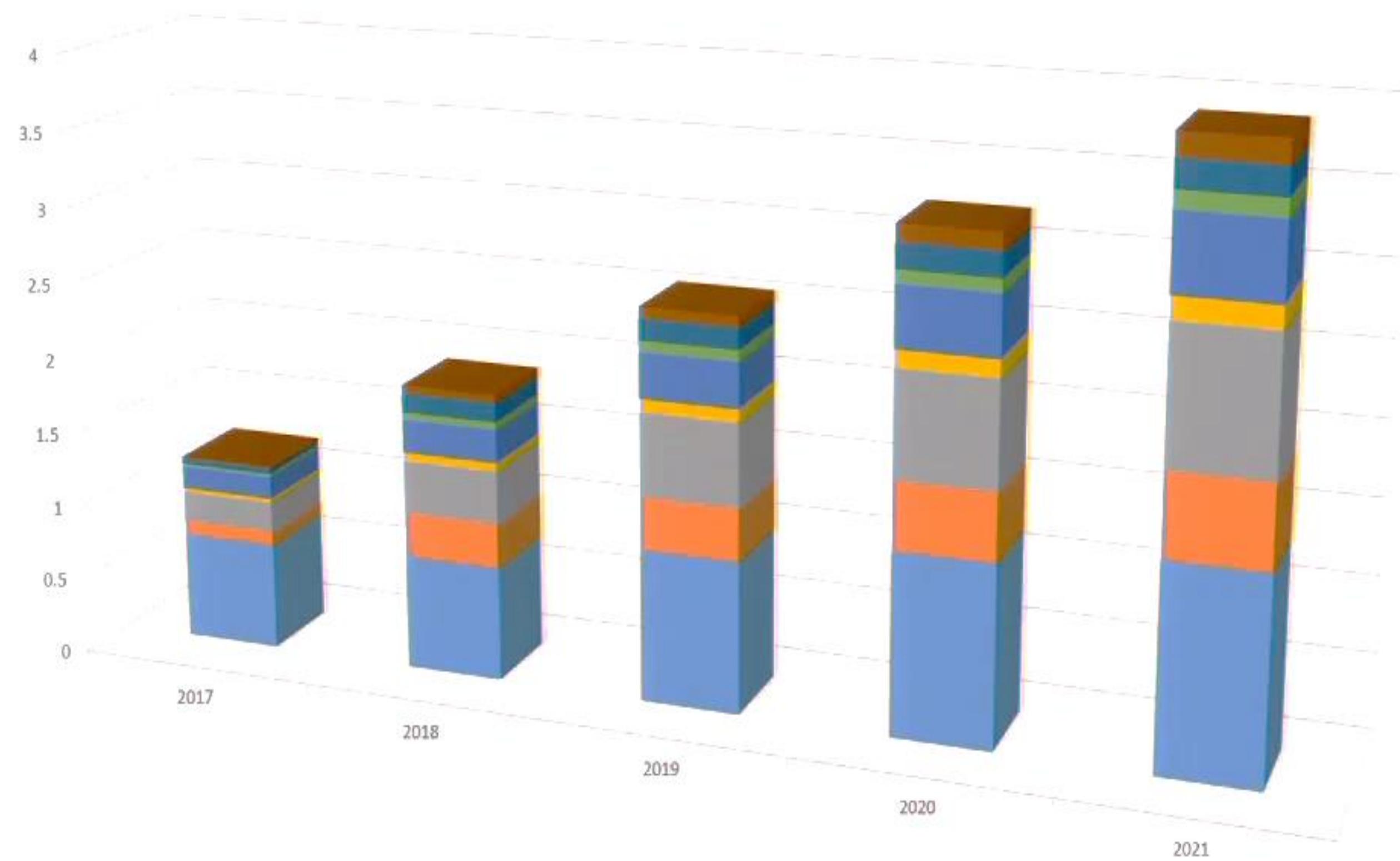
EMBRACING CHANGES
We don't simply get the job done – we innovate, enhance and lead.



YOUR SUCCESS IS OURS
We're motivated and passionate about solving problems, delivering value and meaningful change.

ELIMINATING NOISES
In a world that is becoming increasingly more complex we focus our efforts on the things that matter most

2PM's SERVICES



Project management, Change management, Business Analysis and IT Services are the four key services of 2PM.

Among those, project management and change management are the most prominent services and help 2PM standing out in the consulting market in Hobart.

On the 5 year strategy plan, 2PM is going to expand their services offering by entering into ICT Services and Creative Services. This plan poses the questions:

SHOULD THE NEW SERVICES BE PROVIDED UNDER 2PM ? OR SHOULD THEY ESTABLISH A NEW FIRM ?

HOW CAN 2PM SUPPORT THESE NEW SERVICES ?
(Marketing, IT supports,...)

STRENGTHS

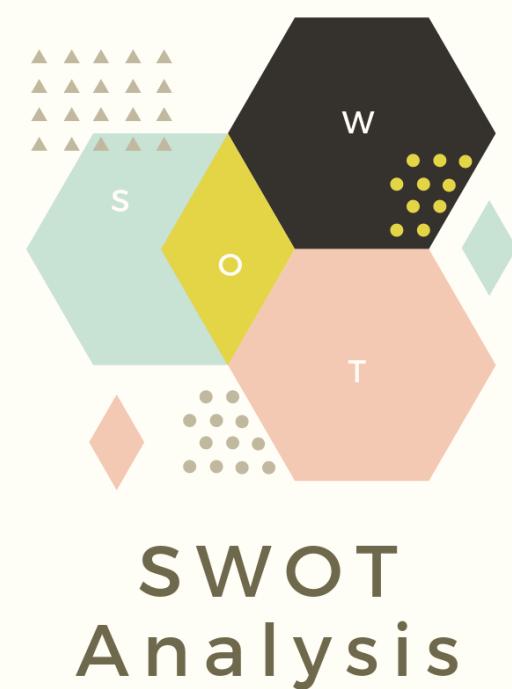


- Strong expertise in project management & ICT
- Good reputation as an award winner in Tasmania
- Clear strategic pillars, well aligned with core value and business goals
- Great range of services
- Consistent quality delivered to customers

OPPORTUNITIES



- New services which are trendy could bring more benefit
- Attract more customers
- Enterprises environment in Tasmania
- Employees will develop more skills and expertise due to the new company structure



- Still a young firm in the consulting market in Hobart
- No prominent marketing activity
- Weak knowledge management practice in dealing with subcontractor employees (20% of the team)
- Lack of effective human resource management tools
- IT infrastructure is no longer compatible with the growth of

the company

WEAKNESSES



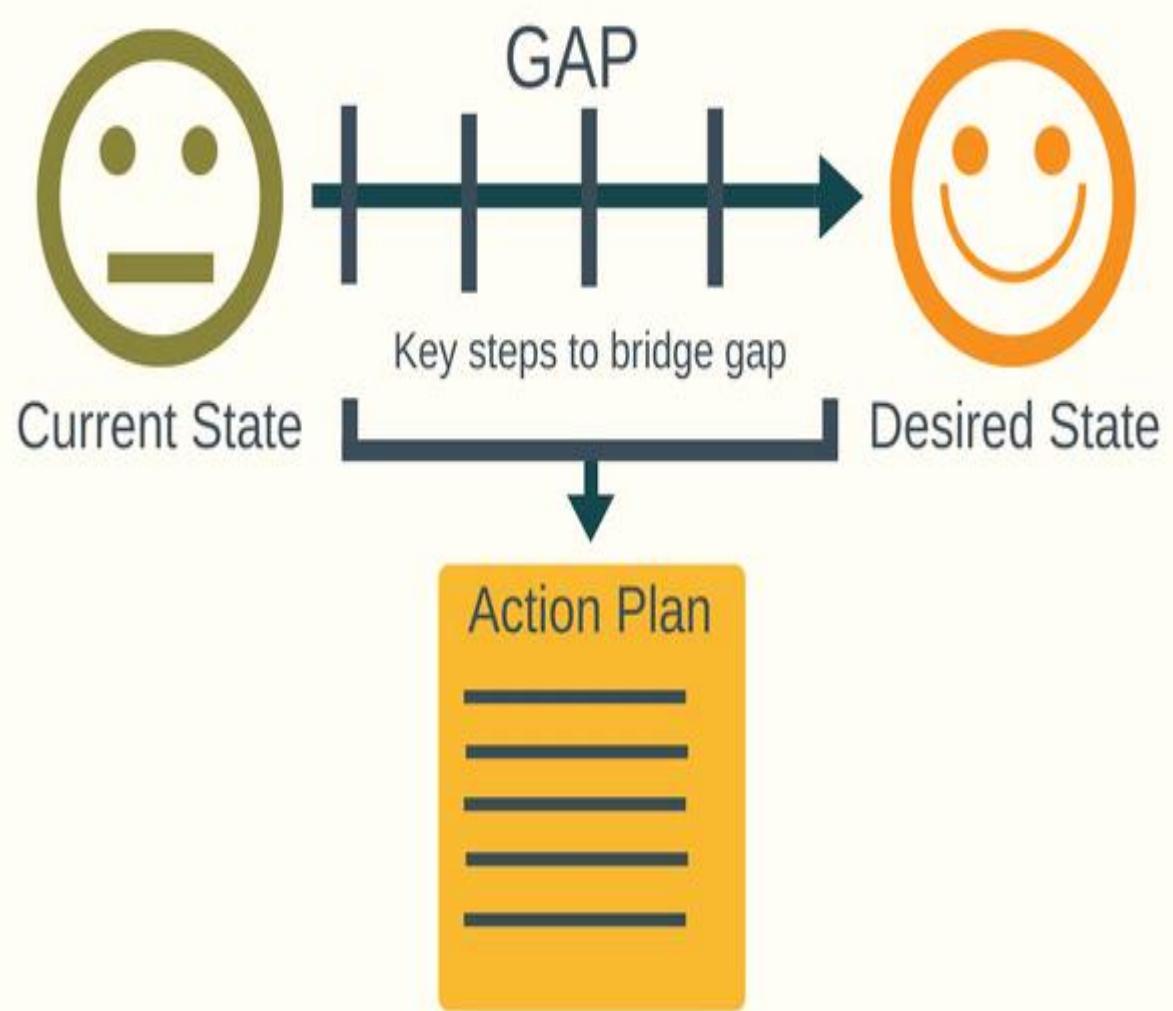
THREATS

- Leak of confidential information and inconsistency of service quality because of subcontractor
- Lose 2PM culture and values during expansion
- Employees do not have enough skills to undertake new roles
- Expansion of big consulting firms and new competitors



BUSINESS GOALS GAP ANALYSIS

Gap Analysis



DESIRED STATE

- Be an outstanding consulting firm with a wide range of services that modern enterprises need: In addition to current services, 2PM want to provide excellent ICT Services and Creative Services and successfully attract potential customers of these services in Hobart
- Expand the team as in the plan: Recruit new talents to join 2PM team and maintain the ratio of: 60% permanent, 20% Subcontractor, 20% Casual employees
- Maintain a good culture and core values when the business is growing
- 2PM 2.0 (Organizational structure transformation should bring specific benefits:
 - ✓ Employees can perform excellently both their primary and secondary responsibilities (internal and external roles)
 - ✓ Managing director's workload can be reduced
 - ✓ Efficiently manage processes and documents related to the change
- Foster collaboration throughout the whole company

CURRENT STATE

- 2PM is still concentrating on the core services and has not decided whether to establish a new firm to provide ICT Services & Creative Services or to integrate those services under 2PM. No prominent marketing activities to promote the business
- The team is now consisting of 15 FTE members, 60% permanent, 20% Subcontractor and 20% Casual. No specialist in the new areas (Creative Services)
- As the company size is still small, it is easy to be people-centric
- The company has just made a significant change in company structure.
 - ✓ Employees are starting to take on new roles. Previously, most employees only perform external responsibility while the Director handled all the internal functions
 - ✓ The manager feels overloaded with the rapid expansion of the company
 - ✓ The new company structure increased the processes and documents. The company does not have a repository to organize documents
- Employees communicate mainly in small teams and within their project

PLAN

- Perform SWOT and Scenario Analysis to decide how 2PM should provide those potential services. Invest more in B2B marketing campaign and awards to build reputation and attract targeted customers in Hobart
- Specific Human Resources Plan should be made with detailed career paths for current employees and recruitment plan. These plans must well align with the growth of business. In addition, these plan also should include how 2PM maintain a good culture (people-centric), empowering current employees to develop themselves during the growth of the company
- A change in the IT Infrastructure is needed to help solve the problems related to the structure changes and create competitive advantages for 2PM in improving working process and communication efficiency



KEY PROBLEMS

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As a result of company business review, SWOT analysis and GAP analysis, here are the problems that 2PM needs to overcome to achieve their business goals



1. Lack of **business plan and marketing plans** to expand the range of services while promoting the current core services to target customers



2. Lack of a solid **Human resources plan** to recruit "right person" at "right time" and deal with organizational culture dilution when expanding the company

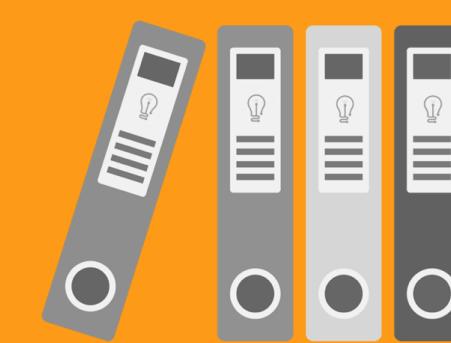


3. The **IT infrastructure** is no longer compatible with the organizational structure changes and might not support the future business or create competitive advantages

OUR FOCUS



4. How to empower employees to take on more roles successfully in a sense that it is a chance to develop, rather than being exploited with more tasks and pressure



5. Lack of a proper solution to **manage documentation and knowledge management.**

PROBLEM BOUNDARY

Among the five outstanding problems of 2PM Services that we discovered, only the problems related to the current inefficient IT application portfolio will be thoroughly discussed.

Specifically, we will focus on developing an IT strategic plan, including implementation proposal to help 2PM improve the current problems in following aspects:

- Project management
- Human resource management
- Collaboration
- Communication
- Knowledge management

The reason why we choose to focus on these specific IT-related problems are explained here

1. Lack of information in other business aspects of 2PM

Our sources to the background information of the case study are:

- ✓ 2PM's presentation and slides
- ✓ 2PM website, Facebook, and information related to 2PM on the Internet (recruitment news, awards news, LinkedIn review).
- ✓ Verbal discussion with students who have done KIT707

The most comprehensive source of information we got is from Mr. Jason's presentation and most of the problems and information he presented in that presentation are related to IT infrastructure. Therefore, we decided to only focus on solving the problems regarding IT application implementation so that we can utilize the information we get and provide an in-depth analysis and comprehensive proposal with a proper implementation plan as requested. For example, we do not have the information related to current marketing activities: Who is in charge of it, what is the marketing budget, who are the target business customers,... or the current strategic recruitment plan of 2PM, the expertise and the performance of each employees, their average salary, ... The shortage of information on other aspects of 2PM's operational activities is the first and most important reason why we set the boundary to the problems being solved in this proposal.

2 . Lack of knowledge and expertise in other aspects

As our group members are all Master of Information Technology & Systems student, our major is all ICT-centric. In addition, none of us has practical experience in HR management, Marketing Strategy or Organizational culture fostering. Therefore, we decided not to discuss other problems because we believe that the outcome of this project is for student to develop skills and knowledge in ICT Systems Strategy and Management. Also, we strongly believe that a proposal on other problems that we do not have much knowledge on will not be in-depth and practical enough to be applied by 2PM.



3 . Lack of time and human resources

A limited of time (less than 3 weeks) and human resources (4 members with different schedules and units) is the third reason why we decided to narrow down the scope. All group members agreed to allocate 4 hours a week for this assignment and 1 hour to reflect findings on ePortfolio. This amount of time does not allow us to go through all 2PM's problems. Therefore, it only allows us to provide a solid solution if we limit the scope of our proposal to solving the most critical issues

4. ICT-related problems is the most crucial problem

First of all, improving IT infrastructure is the most important issue that Jason emphasized many times during his presentation.

Secondly, as the company has just adopted a significant structure change, the corresponding modification in IT system is urgent to help the organizational performance align with the new structure.

Thirdly, a successful implementation of new solution in IT system will help solve many problems at a same time:

- ✓ Improving working efficiency
- ✓ Generating competitive advantages
- ✓ Adopting the best practices in ICT trend, improving consulting experience and knowledge on IT projects
- ✓ Fostering effective collaboration and communication, two important elements of building company culture
- ✓ Enhancing knowledge management
- ✓ Enable better project management and reduce the workload.

For those reasons, Our Group decided to focus the scope of the problems being addressed as developing an IT strategic plan, including implementation proposal to help 2PM improve the current problems in: Project management, Human resource management, Collaboration, Communication, Knowledge management

GAP ANALYSIS FOR 2PM'S IT INFRASTRUCTURE

Area Under Consideration	IT Infrastructure: In this proposal, this refers mostly to application portfolio management. What types of software & applications that 2PM use to help it achieve business goals How to apply those applications to the fullest use?	
<u>Desired State</u>	<u>Present State</u>	<u>Improvement Steps</u>
<ul style="list-style-type: none"> ➤ A powerful integrated project platform (all in one) that fully supports managers with human resource management, financial reporting and workload management and offers strong visual presentation ➤ A central repository documentation solution that helps enhance knowledge management by improving documentation organization and allowing access control ➤ A communication platform that encourage effective collaboration between team members with access control functionality to ensure confidentiality when needed 	<ul style="list-style-type: none"> ➤ A combination of WorkflowMAX, Xero Work well with basic management, including jobs, tasks, timesheets & training schedules Clunky in resource management and financial reporting ➤ A Microsoft shop: Documentation is located in Sharepoint sites and shared via Microsoft Teams: Information everywhere and no access control function ➤ Communicating mainly via Microsoft Teams, No official communication platform for employees from different project teams to communicate 	<ul style="list-style-type: none"> ❖ To purchase and implement a new project management software , 2PM needs to follow these steps: <ol style="list-style-type: none"> 1. Requirement analysis: What are the business requirements and how they are translated into technical requirements to ensure that the IT system aligns with business strategy. 2. Purchasing criteria : Based on the requirement analysis and purchasing capability & expertise 3. Vendor shortlisting: Research for a list of the best practices and highly-ranked IT solutions 4. Assessment: Evaluate the shortlist against the planned criteria & determine the appropriate one 5. Implementation plan: When? How? Who? Proper implementation will maximize the value the new system ❖ To solve the problems related to knowledge management, documentation and collaboration, we will perform: <ol style="list-style-type: none"> 1. Requirement analysis 2. Review the current Microsoft portfolio 3. Evaluation: Improve the Microsoft portfolio or purchase new tools 4. Design and implementation

We conducted another GAP analysis, focus on the IT infrastructure to define the action plan to close the GAP and reach the desired state for the defined problem



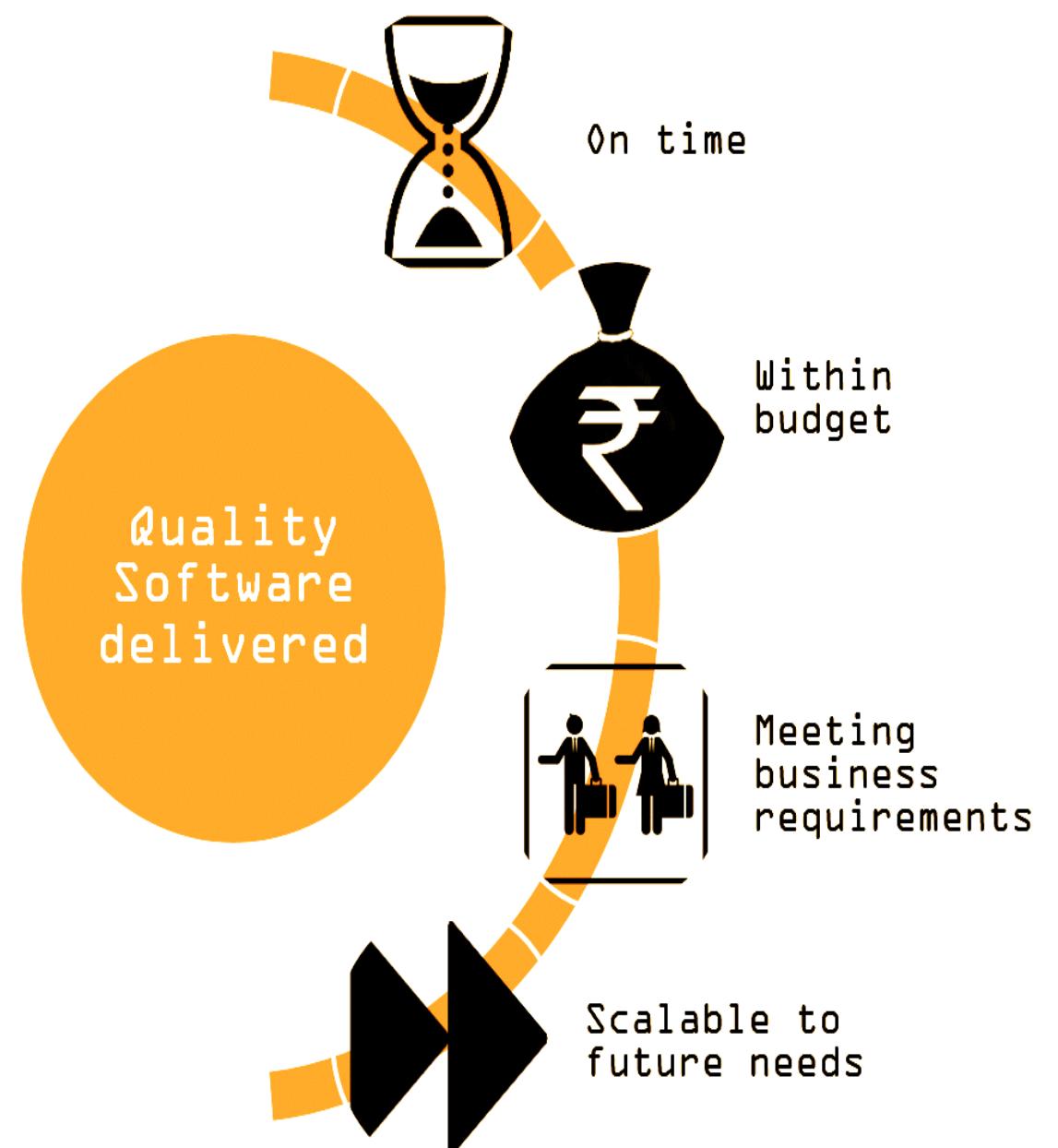
All-in-one Project Platform

- Requirement analysis
- Purchasing criteria
- Vendor shortlist
- Evaluation & selection
- Implementation plan

PROJECT PLATFORM

REQUIREMENTS ANALYSIS

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CONSULTING PROJECT CONSTRAINTS

1. Attracting and developing new business
2. Balancing time, cost and quality:
Ensuring that consulting projects deliver the agreed objectives within time, cost and to the agreed quality
3. Gain industry knowledge & ensure quality of data to develop appropriate solution for customers
4. Team issues: Managing and collaborating with team members in different locations and time zones, solve problems related to inadequate skills for the project, lack of accountability and miscommunication
5. Change: Scope creeping and project changes must be handled in a systematic fashion
6. Technical: How to deal with this new technology. Do we have the staff who can use it? Will they need training? Does the technology we require even exist or will we have to make it ourselves?



Based on the nature of consulting projects, we determine the key aspects to monitor in project management by referencing best practices from academic sources. Then, we will consider the business goals and strategic plan of 2PM to revise and customize the requirements to be more relevant.



OUR REQUIREMENTS

We need a project platform that fully supports managers with human resource management, financial reporting, and workload management. Key functions that we need from this project management software are:

1. Advanced features: Especially in resource management and financial reporting power
2. Ease of use: The process of implementing and integrating the software into the business
3. Scalability: As 2PM is expanding, we need the flexibility in the IS system
4. Security issues: Encryption, access control
5. Integration capability: The software must support a compatible connection with other applications in the company's IT infrastructure
5. User interface: Provide strong visual presentation and allow customization

PURCHASING CRITERIA

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COST

Price is the most important factor that we will consider when selecting the project platform vendor. We know that there are many powerful Business Intelligence and Project Management Solutions which meet or even exceed our requirements. Therefore, an affordable price and flexible plans supporting future business expansion would be highly appreciated during our purchasing process

FEATURES

Mandatory requirements include: All functions related to project management, human resource management, financial reporting. Additional features that are relevant to future business operation would also be considered

INTEGRATION

The ability to connect and share data with other applications such as Gmail, Dropbox, Google Drive, Google Calendar, Microsoft Office365, Sharepoint,...

SECURITY

We are looking for a highly secure and well-built platform which delivers:

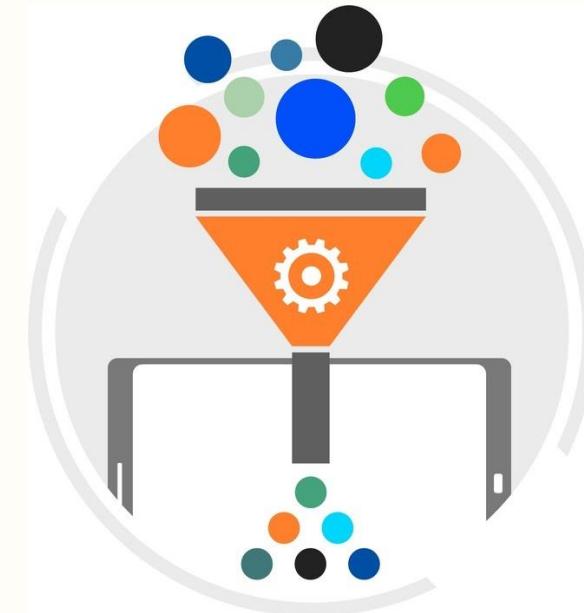
- Encryption
- Access control
- Data policy

USER FRIENDLY

Various platforms supported
Easy to implement and use
Opportunities for customization
Strong visual presentation



VENDOR SHORTLIST



There are hundreds of project management software available in the market.

In order to select the Top 4 integrated project management solutions to evaluate thoroughly, we scanned via Internet for the top recommended solutions for SME consulting businesses from following sources, ignoring the advertising contents:

Getapp.com
Capterra.com
Forbes.com
Softwareadvice.com
Techradar.com
Beterbuys.com

The 1st criteria we used to select the shortlist was: The software must support both Resource management and Financial reporting features. Then, based all the average overall rankings, we selected the Top 4 solutions to perform an in-depth analysis



Mavenlink is a SaaS that transforms the way services organization works. With projects, financials, collaboration, resource management, and business intelligence in a single unified environment, teams using Mavenlink are able to connect, collaborate, execute, and thrive like never before.

The product was launched commercially in 2008



Avaza is a beautiful software suite for small businesses, including modules for project management & collaboration, time tracking, expense management, quoting & invoicing. Consultants and professional service businesses all over the world love Avaza and all the features it offers, which also include powerful reports.

The product was launched commercially in April 2012



Accelo is a cloud-based Service Operations Automation solution that allows users to manage all client-related activities. Accelo Service Operations Automation includes Sales, Projects, Service and Retainers to manage your entire business, from prospect to close and everything in between.

The product was launched in August 2009



Scoro is a software-as-a-service solution for professional and creative services. Its main features include work-scheduling, invoicing, time-tracking, and project management. "The all-in-one business management software designed to bring your team, projects, sales, and reports together"

The product was introduced commercially in 2013



Overall rating

4.2 /5

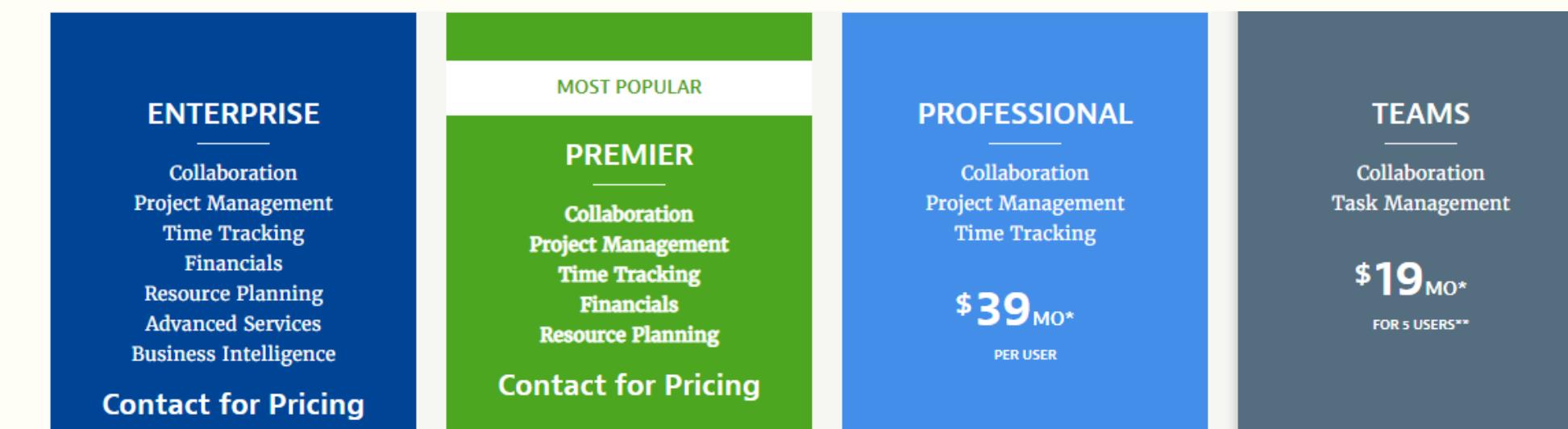
Excellent		137
Very good		96
Average		22
Poor		9
Terrible		8

Value for money		4.0
Features		4.1
Ease of use		4.0
Customer support		4.3

(From: Getapp.com)



COST From \$19/month. However, in order to use Financial reporting features, we need to purchase for Premier package (>\$40/month). We can negotiate for better price quotation



FEATURE Mavenlink offers tools that support both project management, resource planning and financial reporting. Integrated BI function would be helpful for 2PM's future business needs



INTEGRATION Mavenlink allows integration with 26 other applications, including:



SECURITY Regarding Encryption, Access control and Data policy, Mavenlink does not provide strong security features in comparison with SCORO

USER FRIENDLY Mavenlink only provides web-based access, no phone support. It is a user friendly solution with strong visualization dashboard, Gantt Charts & templates to serve multiple business and project management purposes



PROs

- The prices of the plans are scalable
- Advanced features meet 2PM's requirements
- Strong integration ability
- Strong visual support, Well-designed and easy to use

CONs

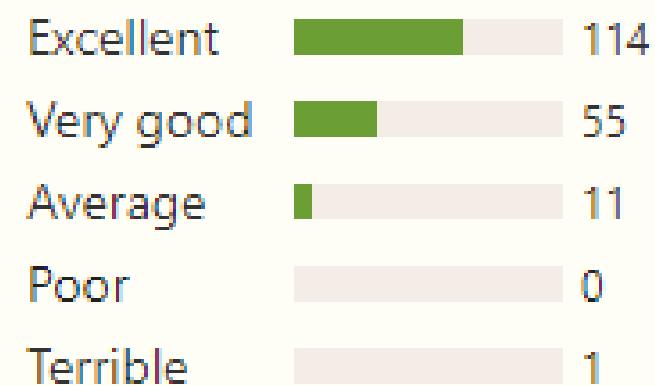
- Expensive
- Weak security features
- Buggy in Gantt charts and scheduling tools are reported by users
- Does not support mobile and messages



avaza

Overall rating

4.6/5



Value for money	★★★★★	4.6
Features	★★★★★	4.4
Ease of use	★★★★★	4.6
Customer support	★★★★★	4.7

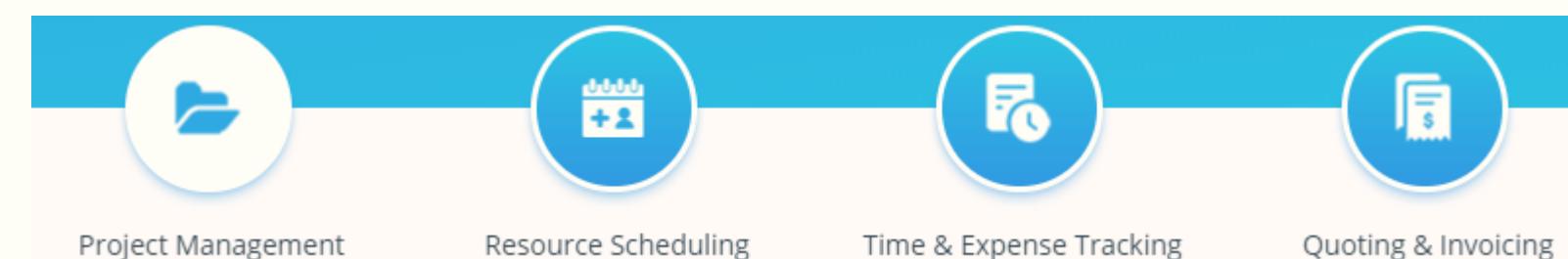
(From: Getapp.com)

COST The basic plan, from 19.95\$/month offers 5 users with Timesheets/ Expense access, 2 users with Admin/Invoice access and 1 user with Resource Scheduling Access is the most suitable option for 2PM due to the next 3 year strategic business plan

Free	Startup	Basic	Business
\$ 0 USD/mo	\$ 9.95 USD/mo	\$ 19.95 USD/mo	\$ 39.95 USD/mo



FEATURE Avaza also offers tools that support both project management, resource planning and financial reporting. However, the financial reporting function is not as flexible and powerful as Mavenlink & Scoro. Its strength is the flexibility in terms of free form invoices, quotes.



Project Management Resource Scheduling Time & Expense Tracking Quoting & Invoicing

INTEGRATION Avaza allows very strong integration with 42 other applications, including:



SECURITY Avaza enables data encryption security, including encryption of sensitive data at rest and HTTPS for all pages. However, it does not support access control like Scoro

USER FRIENDLY Avaza provides access to both web-based and mobile platforms (except for Windows Phone app). It is reviewed as an easy to use software with acceptable visual reporting features and flexible dashboards.

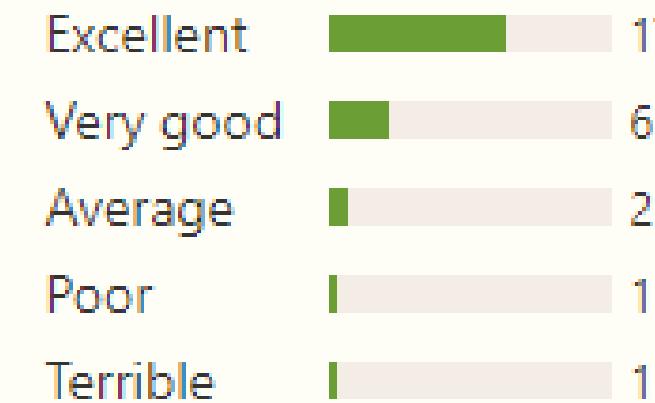
PROs

- Reasonable price, free demo available
- Advanced features meet 2PM's requirements
- Very strong integration ability
- Moderate visual support, well-designed and easy to use
- Positive reviews from SMEs users

CONs

- Limitations on the number of free admin/timesheet users, scheduling users, customers & monthly invoices
- Moderate security
- Weak financial reporting options
- Mobile apps are not regularly updated

IN-DEPTH ANALYSIS



Overall rating

4.4 /5

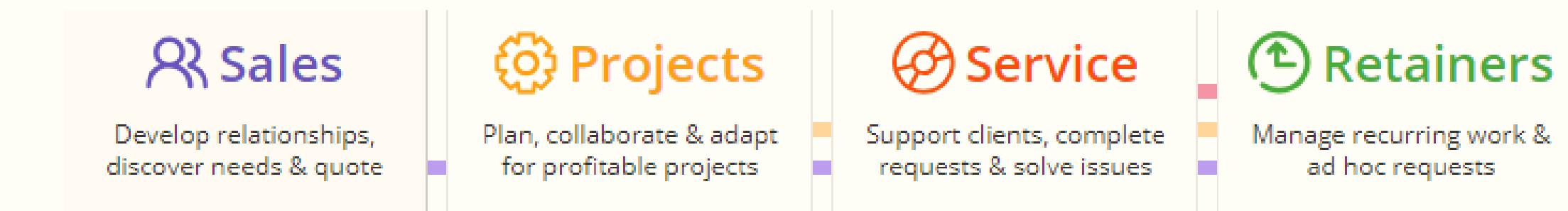
Value for money		4.5
Features		4.6
Ease of use		4.0
Customer support		4.4

(From: Getapp.com)

COST Users can mix and match different products (sales, projects, service, retainers) or get it all with ServOps. Plans start at \$16 per user/month. For 2PM, as we need both project management, resource management and financial reporting features, ServOps Plus, at \$34/month would be the best fit

Projects PLUS Growing teams that need more	\$16	ServOps PLUS Growing teams that need more	\$34
			ServOps PREMIUM Maximum flexibility & automation \$69

FEATURE In addition to sales, projects and services features, Accelo developed retainers to allow users manage recurring work and ad hoc requests.



INTEGRATION Accelo allows the strongest integration capability, with 48 other applications:



SECURITY Regarding Encryption, Access control and Data policy, Accelo does not provide strong security features in comparison with SCORO

USER FRIENDLY Accelo provides access to both web-based and mobile platforms (except for Windows Phone app). The integration ability allows users to get familiar and customize the settings easily. However, too many functions are reported as utterly confusing sometimes

PROs

- Flexible package plan, easy to customize
- Very strong integration ability
- Beautiful & creative design for dashboard and report

CONs

- Quite expensive
- Weak financial reporting options
- Weak security features

IN-DEPTH ANALYSIS



Overall rating

4.6/5

Excellent	<div style="width: 86%;"></div>	86
Very good	<div style="width: 33%;"></div>	33
Average	<div style="width: 5%;"></div>	5
Poor	<div style="width: 0%;"></div>	0
Terrible	<div style="width: 1%;"></div>	1

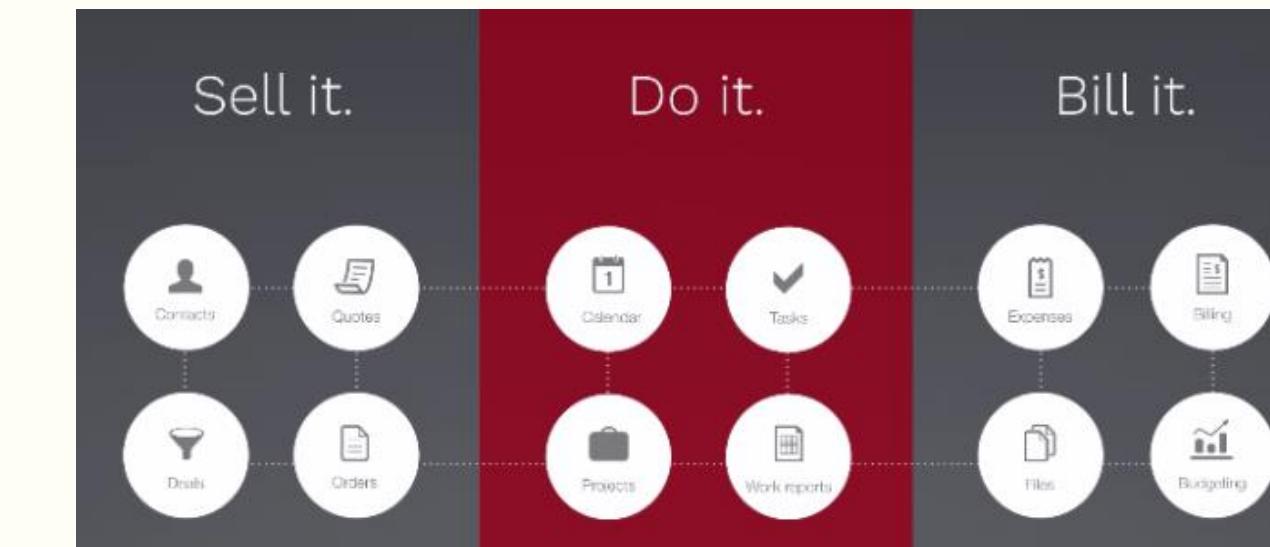
Value for money		4.4
Features		4.4
Ease of use		4.5
Customer support		4.5

(From: Getapp.com)

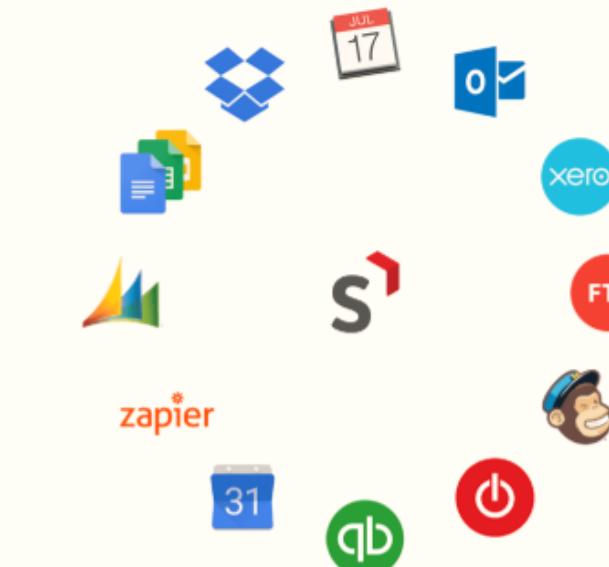
COST Scoro is the most expensive software among 4 options. As 2PM needs Xero integration and advanced project management and financial reporting features, the Premium plan, at \$48/ user/ month would be the best choice

PLUS	PREMIUM	ULTIMATE
AU \$32	AU \$48	AU \$76
user/month minimum 5 users	user/month minimum 5 users	user/month minimum 5 users
Onboarding from AU \$1,500	Onboarding from AU \$1,500	Onboarding from AU \$1,500

FEATURE Scoro is very strong at both human resource management, financial management and dashboard/reporting features. The software offers the best solution to 2PM's business requirements



INTEGRATION Scoro allows an acceptable integration ability with 12 other applications, including:



SECURITY Scoro is the most secure business management tool among 4 options, which enables data policy, access control and encryption security

USER FRIENDLY Scoro provides access to both web-based and mobile platforms (except for Windows Phone app). It is reviewed as an easy to use software with advanced visual reporting features and flexible dashboards. Customer support and active updated tutorials are also highly appreciated by users

PROs

- Advanced features meet all 2PM's business requirements
- Best security features offered
- Advanced visual support, well-designed and easy to use with great customer support

CONs

- The most expensive solution
- Moderate integration ability
- Lacks some project management features like Gantt chart, Task dependencies

IN-DEPTH ANALYSIS

EVALUATION SUMMARY

	 Mavenlink	 avaza	 accelo	 scoro
COST	\$40 / user/ month For Premier Package	\$19.95 / user/ month For Basic Plan	\$34 / user/ month For Servop Plus Plan	\$48 / user/ month For Premium Plan
FEATURES				
INTEGRATION				
SECURITY				
USERFRIENDLY				

WHY SCORO IS THE BEST CHOICE ?



✓ BEST ALL-IN-ONE SOLUTION

SCORO offers perfect features that 2PM is looking for to fill the "GAP"

RESOURCE MANAGEMENT

- **Scoro's Planner** enables managers to assign new tasks to team members and see who's overbooked, who is about to finish their project – or who could take on another task or two.
- **Scoro's Calendar** provides a clear overview of all the events the team have planned and allow the whole team having an overview of the availability of the resources.
- **Scoro's Utilization Report** assists real-time employees' performance review with insights from powerful reporting options

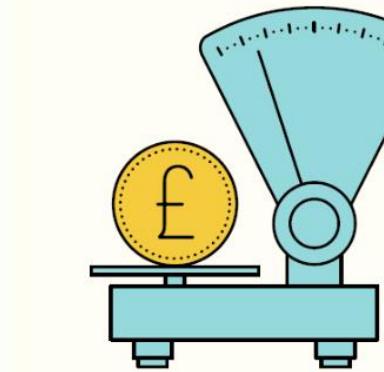
FINANCIAL REPORTING

SCORO can integrate perfectly with Xero and provide:

- **Real-time sales KPI**
- Full financial overview on sales, expenses and budgets in one place to support managers making data-based decisions

✓ SECURITY

With its advanced level of security in comparison with other alternatives (256-bit encryption – the best practice), SCORO allows 2PM to sustainably maintain their strategic pillars: An secured system to protect 2PM data and customer's confidential information which is a mandatory basis to provide high quality service in consulting industry. In addition, access control features would help in granting and limiting access to subcontractors

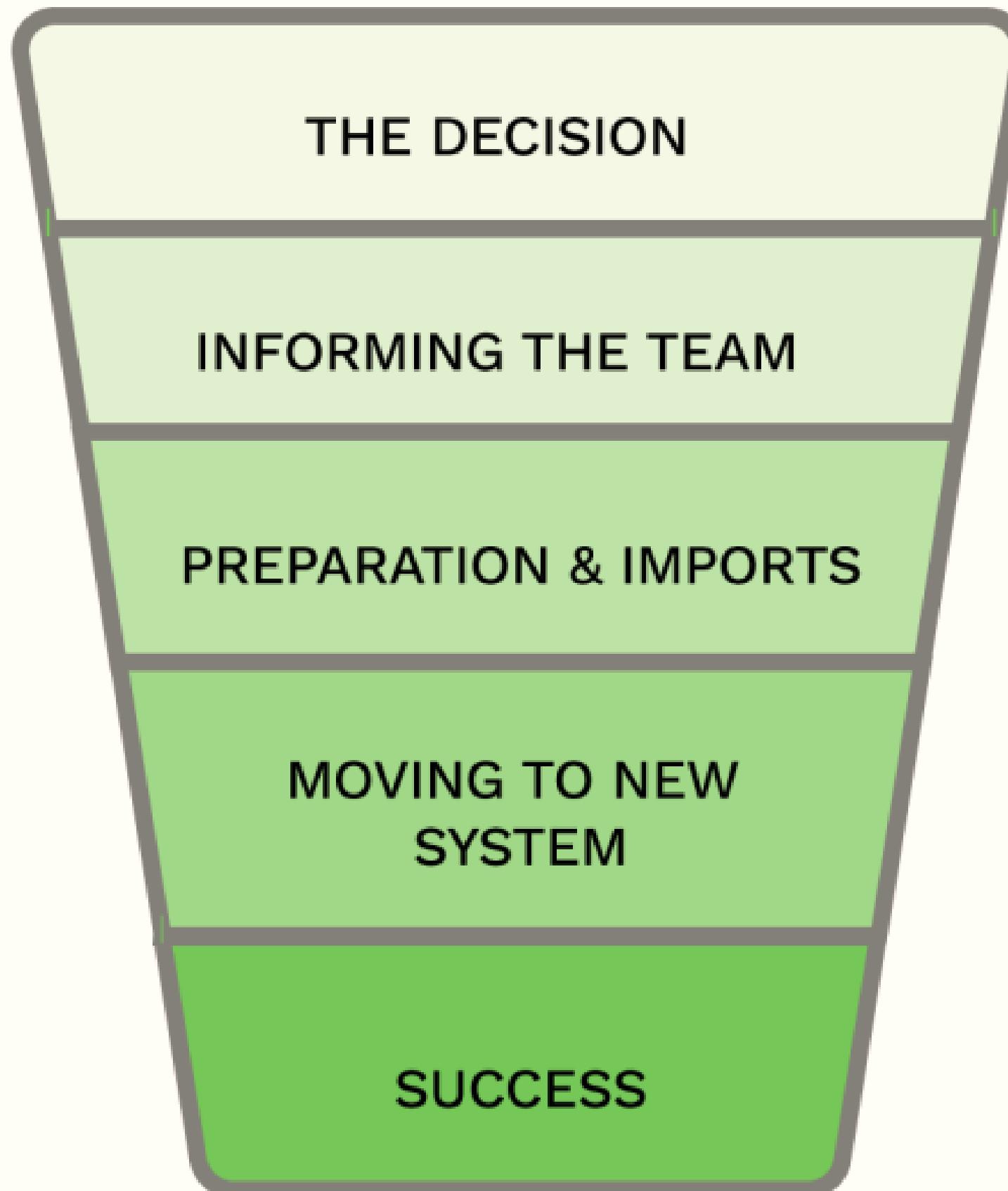


VALUE FOR MONEY

Even though SCORO is the most expensive option that we put into consideration, the various benefits it could offer 2PM are far more valuable than the 2nd best choice (Accelo). Other reasons why we suggested SCORO are:

- Amazing dashboard visualization, which allows customization
- Onboarding assistance program and useful support resources
- Simplicity in implementation and integration with current system





Implementation Plan

1. Decision & Procurement
2. Communication
3. Preparation & Imports
4. Moving to Scoro
5. Monitoring & updating

PROCUREMENT PROCESS



FREE TRIAL

SCORO offers business a 14-day free trial to see how it can work before making procurement decision.

Available features on Free trial version:

- Business dashboard
- Calendar & task management
- Basic project management
- CRM & quote management
- Invoices & expenses
- Financial & work reports
- Calendar, Toggl, Dropbox & MailChimp integrations

During trial period, 2PM should conduct a before and after evaluation regarding the users' experience on the speed, the interface and the efficiency of the software



As a firm providing project management services, 2PM can deal a partnership with SCORO to get a special offer:

SCORO will support 2PM in adopting this software as a successful model. Then, once 2PM team get in-depth expertise in deploying the software, they might consult this solution to the potential customers in future project.

The Premium Package is the best option for 2PM.

Fee: \$48/ user/ month
(Minimum: 5 users)

We suggested 2PM start with installing SCORO for the whole team to offer all FTE employees the opportunities to learn and practice with this advanced tool, which costs \$720/month

Onboarding: \$1,500 / 10 hours training for essential guidance on the usage of SCORO. This is necessary as the professional consultants from SCORO will introduce the helpful tips and advice to fully deploy the software's features

ESSENTIAL	
Help on setting up the site and integrations	AU \$1,500
Business process mapping	1 h
Data import analysis	2 h
Help on configuring PDF templates	1 h
Admin and team trainings	2 h
	4 h
PLAN	

CONTENT



WHAT IS SCORO ?

WHY WE NEED SCORO ?

HOW WILL WE CHANGE ?

ROLES & TASKS

WHAT ARE THE KPIs ?

HOW ?



- ✓ Communicate about the change from current system to SCORO should be clear and in an engaging manner so that employees feel that they are a part of the change and support it.
- ✓ Communication should be two-way so that feedbacks and concerns can be discussed immediately

HOW OFTEN ?

- ✓ Before adaptation: Ask for opinions and suggestions, expectation and implementation plan
- ✓ During trial period: Ask for feedbacks and discuss the potential benefits
- ✓ During implementation: To ensure the progress is as planned and to assist users if needed



***“Communication is
the key to success”***



MOVING TO SCORO



CUSTOMIZATION

- ✓ Check list for customization to 2PM's business needs:
- ✓ Dashboard set-up according to important KPIs and custom reports
- ✓ Building PDF templates for quotes and invoices and.
- ✓ Adding invoices in Scoro
- ✓ Adding email templates for example for sending quotes, orders, invoices, invoice reminders
- ✓ Adding custom fields for almost any feature
- ✓ Choosing default views for calendar, tasks, contacts, quotes
- ✓ Customizing product/activity categories, user profiles
- ✓ Team access rights

() 2PM should ask for help with settings during Onboarding period*

IMPORT DATA

- ✓ One way to import data is to export it from the existing tools and solutions as an Excel file and import it to the new product.
- ✓ As 2PM's business size is still small, we can also enter our data manually from SCORO interface

INTEGRATION

Integrations enable quick two-way information exchange between two software products. 2PM can easily integrate SCORO with those existing platforms:

- ✓ Google Calendar/ Ical Calendar
- ✓ Outlook/ MS Exchange
- ✓ Xero

() For software that does not provide integration, we can use API (application programming interface) to build custom integrations*

TESTING: Create our own workflow, including all the features we are going to use and ensure they cooperate with other tools. If the software involves sending emails or quotes, send some test emails to our own account.

TRAINING: There should be both admin training (how all the features of SCORO work) and user trainings to introduce the software to new users and avoid confusing lower level employees that only use several features.

FEEDBACK: There should be regular KPI review after a couple of first months of implementing to learn more about all the features and techniques that work best for our business.

UPDATE: Ensure that 2PM always stays updated with the latest version of SCORO

MONITOR

Reorganize Microsoft Office 365 System

- Requirement analysis
- Review the current Microsoft portfolio
- Evaluation
- Design and implementation



REQUIREMENTS ANALYSIS



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FOSTER COLLABORATION

At 2PM, it's people that makes us tick. We value relationships and we're passionate about helping others succeed. In the future, the team will become bigger, more services will be offered and one employee may perform many roles and tasks simultaneously. Therefore, we need to improve our IT infrastructure so that employers are well equipped with useful tool to communicate and access to shared materials, not only in a project team, but on enterprise level. We expect to see an open working environment at 2PM during the expansion. Efficient communication and collaboration are key to demonstrate our strategic pillars: connecting people to provide excellent services



We need a single platform that centralizes all documents in one place and is easy for users to search specific contents, share and keep track on them. Key functionalities that we are looking for are:

1. Centralization: organize increasing number of documents in one place
2. Access Control: only share necessary client information and models to subcontractors and maintain high level of business confidentiality
3. Consistency: fits all aspects of the services including new sectors in new organizational structure and processes
4. Quality control: not just track the processes quality of the service delivery, focus on staff initiatives
5. Prepare for the future: space for future growth, new functions (video) for new business sectors;
6. Maintain good business values and culture
7. Knowledge management and knowledge sharing
8. User friendly.



KNOWLEDGE MANAGEMENT

To be successful, a consulting firm must be knowledge intensive, apply reuse economics, create knowledge and deliver quality to keep pace with constant change. In order to achieve that, 2PM needs to effectively and efficiently organise and manage the processes of knowledge sharing internally in the organisation with the help of a proper IT system

Due to the change of structure, the expansion of the company and the requirement of new services, more and more documents related to processes, standard templates, state-of-the-art technology knowledge, best practices, and so on will need to be well managed so that the "right" person can get access to the "right" source of information quickly.

CURRENT MICROSOFT PORTFOLIO

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2PM is a **Microsoft shop**.
2PM is using Microsoft Office 365 Business Premium, with office applications and services included, which helps 2PM to collaborate well with customers.

For documentation management:

SharePoint: Each team will upload documents related to their projects on separate SharePoint sites. Therefore, information is fragmented, “all over the place”.

Teams: is also been adopted for chat, meetings, notes and attachments. This added more fragmentation in the knowledge management in corporate level

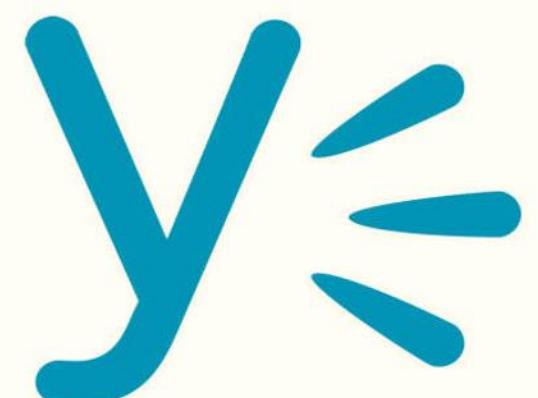
EVALUATION

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Based on the eight criteria that 2PM is searching for a solution to improve knowledge management and empower team collaboration and an analysis of the current use of Microsoft Office 365, we are convinced that all of the requirements of 2PM can be solved by a rearrangement and adaptation of new services to make the full use of the Premium package of **Microsoft Office 365 Business Premium** that 2PM's currently using. The functions of **Harmon.ie** (suggested solution) could be well offered by:

Microsoft Delve (which is included in Microsoft Office 365 Business Premium): a single and integrated platform that allows users to collaborate, communicate and share with each other. Delve can perfectly solve the problem of knowledge management and documentation access control.

Microsoft Yammer (which is also included in Microsoft Office 365 Business Premium): Connect and engage across organization. It is widely used for communicating openly to build transparency, create stronger communities by sharing best practices, and crowdsource ideas to drive initiatives forward.



Collaborating using Delve, Yammer and SharePoint

OFFICE DELVE vs HARMON.IE

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	 Office Delve	 harmon.ie®	
Price	Free, Included in Microsoft Premium	\$6/ user/ month	The most prominent feature of Office Delve is its machine learning intelligence capability, which can improve COLLABORATION by suggesting users the documents they might need automatically on Board. Microsoft Delve connects senior management people, co-workers and even customers together
Features	<ul style="list-style-type: none"> Add-on application of Office 365 that connect to SharePoint, Office 365 and Microsoft Office to enable users gain information regarding what they're working on and whom they're working with (using Machine learning algorithms) Individualized Account Page: Users can curate your profiles to present information about yourself, such as pictures, projects, and skills to make it easier for colleagues to find you and hook up with you. Delve users can utilize the people search-and-find feature to locate fellow members. Users can create a board to arrange documents related to a project, allowing access to everyone involved in that project. It enables those additional users to see that board and contribute content cards to it. Privacy: When a document is labelled private, it doesn't allow other users to access that file. Security: Delve only allows users to view documents which they have been granted permission to see. It does not permit the use of private records or documents by users who have not been granted access. Likewise, a user's private activities aren't visible to others 	<ul style="list-style-type: none"> Connect Microsoft Outlook, SharePoint, Office 365 and Microsoft Office into one place Increase collaboration, compliance and SharePoint adoption Organize emails and documents by topic directly from Outlook. Upload emails and documents to SharePoint, share document links instead of attachments, and much more...all without leaving Outlook. Search for topic Follow document updates Yammer integration. 	<p>For 2PM, contractors can be connected through Delve and all project progress can be tracked and shared to ensure the quality of the services from subcontractors.</p> <p>2PM's culture can be reflected from the key feature of Delve, which is to find right information through people by clicking on the person's profile. And customers can be connected and managed with Board. And they would have sense of involvement when they can work very closely with the team.</p> <p>The types of files and source destination that Delve can support and integrate with is also compatible with the needs of 2PM. The variety in file types would allow consultants of 2PM to share videos, which are crucial to their new services: ICT services and Creative services</p>

Office Delve can cover almost all of the functions that 2PM needs offered by Harmon.ie
Also, Office Delve is free and it is part of the Office 365. Therefore, 2PM can avoid the additional cost and problems of transitioning from existing platform to new services

Types	Source Destination
Office documents (Word, PowerPoint, Excel), PDFs, OneNote sections, content from SharePoint Sites (for example tasks and pages), images (for example jpg and png files), and more	Documents stored in OneDrive for Business or SharePoint in Office 365. Form owner's documents page, or on other people's pages.
Email attachments	From email attachments (within the email conversation)
Videos	From Office 365 Video portal.

OFFICE DELVE INTERFACE

The screenshot shows the Office Delve interface with a dashboard layout. On the left, there's a sidebar with navigation links: 'Me', 'MyAnalytics', 'Favorites', 'People' (listing Allie Bilew, Tony Krijnen, Zrinka Makovac, Katie Jordan, Tony Krijnen, Aziz Hassouneh, Janet Schorr, and Bonnie Kearney), and 'Boards' (listing 'CONTOSO REPORTS Q2 EARNINGS' and 'Contoso Reports Q2'). The main area displays several cards: 'Q2 Web Market Planning' (PowerPoint presentation, 522 views), 'Documents • Contoso' (OneNote notebook), 'Aziz Hassouneh's OneDrive' (163 views), and 'CONTOSO REPORTS Q2 EARNINGS' (Excel file). A red box highlights the 'DASHBOARD' button at the bottom.

- Get back to your documents
- Add favorites and get back to them later
- Click a name or picture to go to someone's profile page
- Click a card to open the document

DASHBOARD

The screenshots illustrate the OneDrive interface:

- Go to OneDrive**: Shows the Office 365 | Delve home screen with tiles for Mail, Calendar, People, Yammer, OneDrive, SharePoint, Planner, Project, and Tasks.
- Create new folder**: Shows the OneDrive file creation screen with options for 'Folder', 'Word document', and 'Excel workbook'.
- Share/invite**: Shows the 'Share 'Contoso'' dialog box, which includes fields for 'Name' (T. Name) and 'Contoso', and checkboxes for 'Share everything in this folder, even items with unique permissions.' and 'Send an email invitation.'
- Upload**: Shows the OneDrive upload screen with options for '+ New', 'Upload', 'Share link', 'Get link', and 'Download'.

Office Delve has a familiar user interface and navigation with a professional dashboard look and feel

NAVIGATION

YAMMER – ENTERPRISE “FACEBOOK”

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WHAT IS Yammer

It is an enterprise social networking service that helps workers connect, share and collaborate.

Yammer is a corporate private/ intranet social network that helps team stay on top of it all.

It enables conversations, collaboration on files and organization around projects.

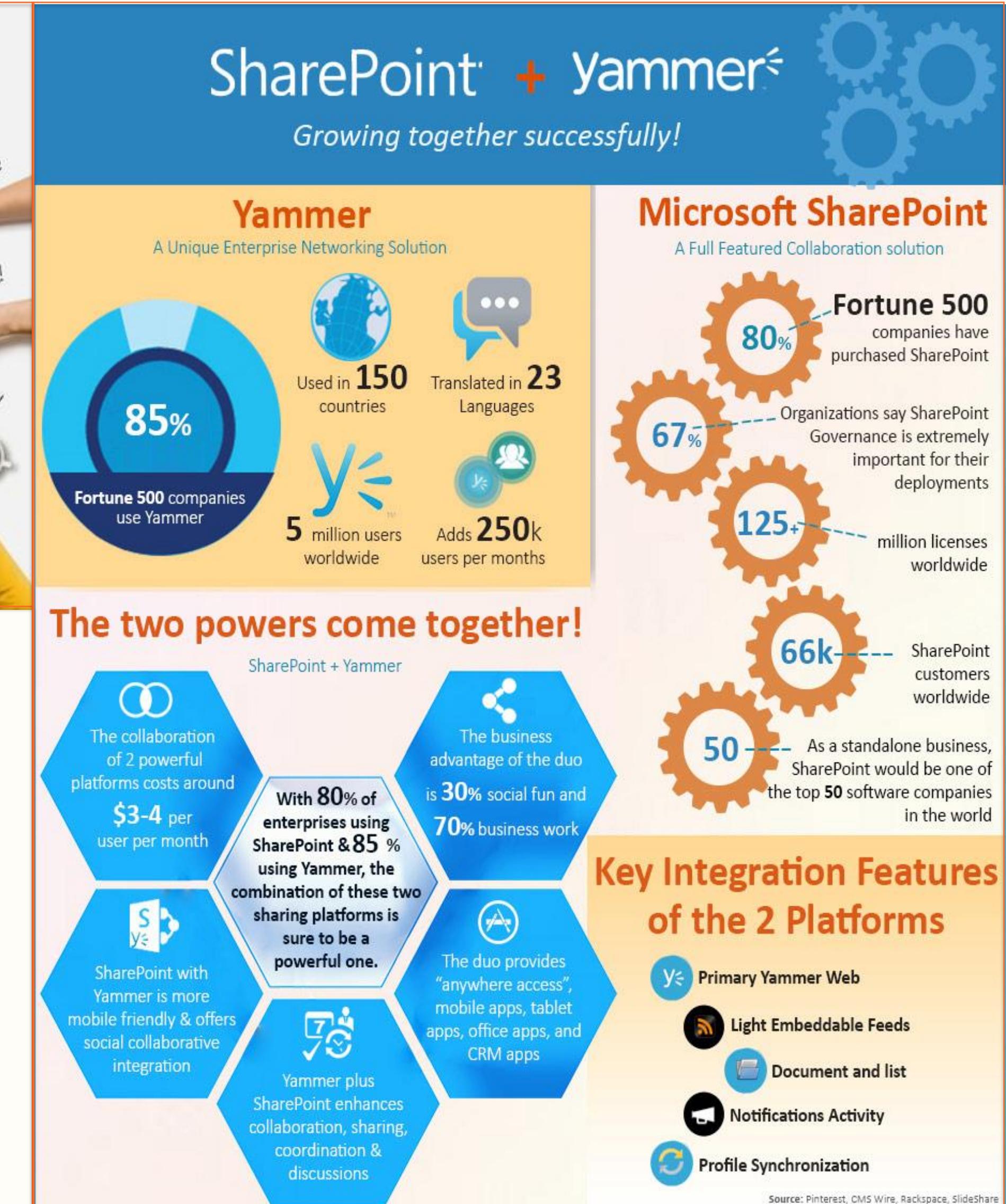
“Organization that use social enterprise technologies like Yammer see a 37% improvement in project collaboration”



HOW IT FITS 2PM

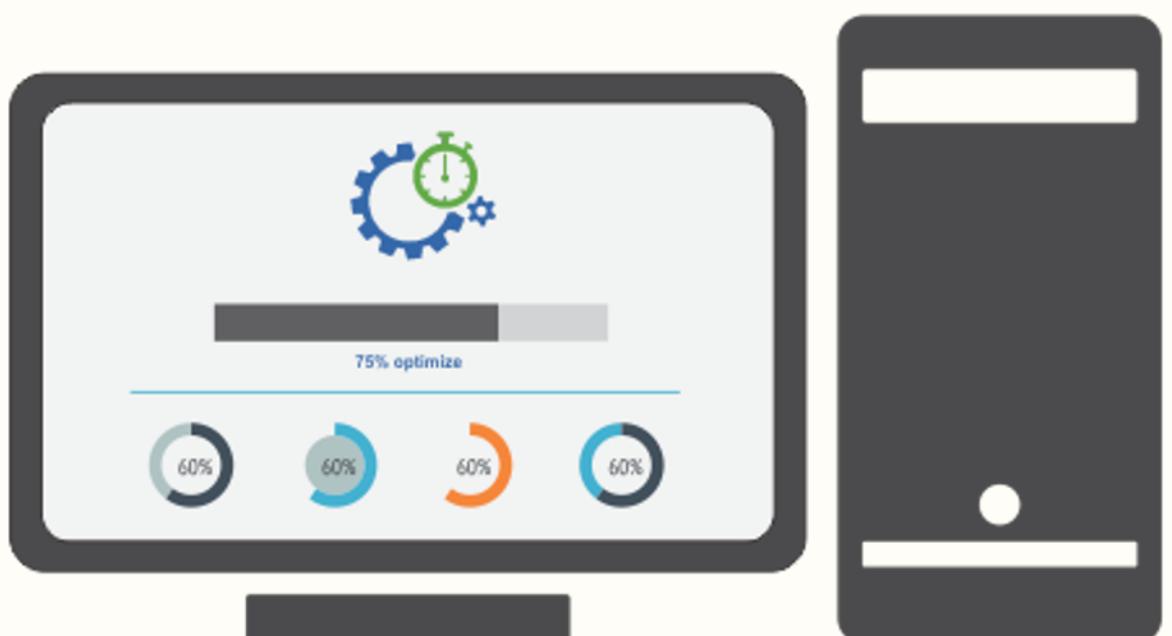
As 2PM is a small enterprise, Yammer would be perfect for both project-related discussion and casual discussion, which is a part of fostering the people-centric culture of 2PM.

In addition, Yammer is an opened platform for employees to share ideas, viral clips and social trends, which might be inspiring and trigger creativity when 2PM introduces new creative services.



TECHNICAL INSTALLATION

As both of the applications are included in Microsoft Premium package, the installation step should be easy. This can be done via email from IT specialist or Project manager to ask employee to install the application and read the manual instruction from Microsoft. However, an customized manual version with focus on 2PM's critical features would be better.



HOW TO DEPLOY NEW APPS SUCCESSFULLY?



TRAINING: *Proper training is essential to make sure all employees have installed the apps and know how to use the basic functions*



COMMUNICATION: *Why use Delve & Yammer? Explain the benefits and the roles, rewards of each members on a regular basis*



KEY PERSON/ AMBASSADOR: *During the deployment stage of new application, 2PM needs to assign one key person as ambassador who will start discussions as well as guide people towards Yammer & Delve*



CLEAR USAGE POLICY: *A clear policy will help 2PM avoid fragmented documentations as communication is not performed on the right channel*



REWARD: *Think of ways to reward people for using Yammer. For example, 2PM can organize competition on Yammer, or Delve active members. It's a little push that will make employers want to use Yammer & Delve frequently and learn how to do it.*

SUMMARY

As a young and fast-growing consulting firm based in Hobart, 2PM Services is facing with many challenges on their way expanding the business quickly, yet remain their great core value - focus on people, system and service. One of the greatest challenges that our group identified by using strategy analysis tools (SWOT, GAP analysis) and decided to research for a solution, including proposal implementation plan is the incompatible IT infrastructure with the business requirements.

The proposal presents 2 implementation plan for two IT solutions that are expected to solve the current business problem of 2PM

- Implement SCORO – An all-in-one business management platform
- Enhance the Office 365 – Implement Office Delve and Internal social platform Yammer

The solution is expected to help 2PM improving the following fields of their business operation: Project management, Human resource management, Collaboration, Communication and Knowledge management.

The proposal has been done mostly by applying group member's knowledge from KIT708- ICT Strategy and Management, conducting research using academic sources and Internet sources. Therefore, we are more than welcome to receive feedback from 2PM to improve our strategic proposal.



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Casual



thank you!