

# Enterprise Project Capability (EPC) Service Line Engagement Pack



02-Dec-2019

IT&S

# Contents

- Background, purpose and audience
- Why was the EPC Service Line created?
- What is the EPC Service Line remit?
- What changes? – Example Risk and Issue Management
- Who do I interact with? – EPC Service Line Organisation
- How will the Service Line engage and support my project?
  - Step 0: EPC Engagement – commitment to proceed
  - Step 1: EPC On-boarding
- Recap and next steps
- Appendix
  - Project vs. EPC Service Line Accountabilities
  - EPC Service Line frequency, deliverables and tools
  - EPC Indicative pricing

# Background, purpose and audience

- **Background**

- IT&S Enterprise (formerly BAS) has set up an Enterprise Project Capability (EPC) service (formerly BP PMO) – this service is an important element of our new IT&S Operating Model across all of BP
- The aim of the EPC service is to provide a decision enabling delivery support model for business change
- Having standard, up to date and reliable project information will enable Enterprise to seek greater efficiencies, cost optimisation and service quality for Portfolios and Services delivered

- **Purpose & Audience**

- Introduce the EPC service line to the IT&S project community, especially the Portfolio and Service Owner, Product Owner and Squad Lead, who will be the target customers of this service
- Inform how the EPC will change the way PMO services are provided and who will be the key contacts
- Demonstrate how the EPC will improve Portfolio and Service Owners productivity by reducing their time documenting, tracking, administering and reporting allowing them to focus on delivery, risk and stakeholder management
- Enable a Portfolio and Service Owners to decide if they are ready to engage with the EPC
- Note that this pack does not detail the EPC process in detail – this is provided through the EPC Service Areas section on the [EPC Portal](#) and during On-boarding

# Why was EPC Service Line created?

## Objectives

### Standardise, simplify and enhance BP's Project Management capability

- Provide a centre of excellence to allow BP to quickly leverage best practice and industry innovations quickly and efficiently
- Enable improved project/programme delivery quality in a value driven organisation
- Ensure a consistent end to end process with complete data to enable consolidated clear MI
- Increase the maturity of a EPC Service within BP
- Establish an overall enduring project/programme management organisation through the IT&S Transformation
- Utilise economies of scale to enable the reduction in the baseline cost to deliver

## Benefits

**Infosys led EPC Service Line** running a consistent pan-BP service deploying accelerators to drive **benefits** for BP

### Service Line Accelerators



**PM Zone:** PM's One-stop-shop (portal) with an integrated view of a project with roll-up capability for program/portfolio reporting



**Integrated Workbench:** Combined Infosys and BP knowledge assets for best-in-class templates, standards, methodologies



**Automation:** Leverage automation for reporting and audits



**Continuous Improvement:** Improve service maturity through CoE lead continuous improvement



**Global Delivery Model:** Provide factory based delivery model

## Benefits

**Standardization**

**Simplified Operations**

**Increased Adoption**

**Strategic Insights**



# EPC Service across IT&S Portfolios

We are providing consistent, efficient, and standardized delivery of services to Services and Portfolios across IT & S for managing Business Change, Agile Delivery, Financial Management, Assurance & Reporting.

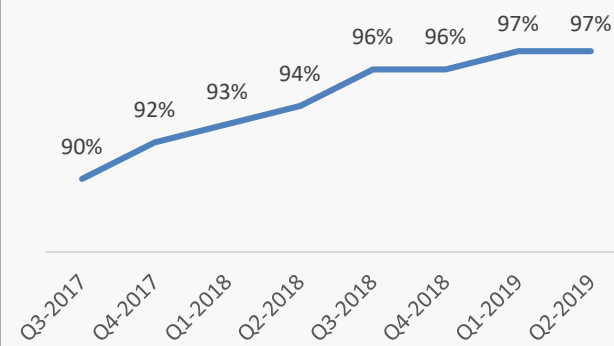


Segment / Common Services	Portfolio Name	# of Projects
Downstream	Data	144
	Digital	
	Fuels Supply Logistics	
	Lubricants	
	Refining	
	Retail & Payment	
Upstream Digital	BPDataWorx	26
	Digital Ops - Operating Functions	
Trading	Compliance, Regulatory, Risk and Finance	13
Functions	Automation CoE	6
	Procurement	
	Treasury	
Digital Security	Digital Security	25
	Business Information Security	
	Counter Threat Unit (CTU)	
	Governance, Risk & Compliance	
	PCN Protection	
	Security Platforms	
Enterprise	Data Platforms	23
	Networks	
	Digital Workplace	
	Transformation & Chapters	
<b>Total</b>	<b>22 Portfolios</b>	<b>237</b>

# Enterprise Project Capability (EPC) service - the journey so far



## Project Data Integrity Score



Currently

Service Provided to 237 Projects  
-New finance & portfolio tracker rollout  
- **CSAT Score @ 100%**

Dec - 2018

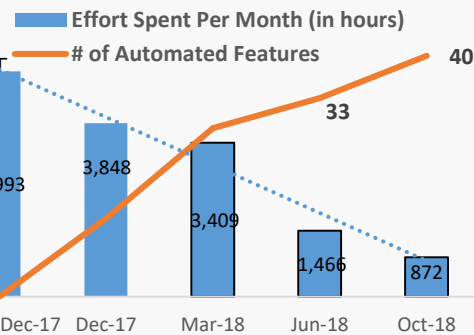
- Providing services to 220 projects across all segments  
- **CSAT Score @ 98%**  
- **EPC Agile services rolled out**

Jun 2018

- RPA for Assurance Automation  
- Automation enabling EPC to take on more ad-hoc tasks, increasing in Delivery Quality, and has allowed us to scale up  
- **CSAT Score @ 94 %**

December-2017

- Servicing projects across ESA  
- Started services to GOO and GET  
- Automation and CI using Agile  
- **CSAT Score @ 91%**



Automation enabled reduction in manual efforts

Dec 2016 – EPC Journey begins

## Voice of Customer



Markus Krieger, Head of Project Delivery, ESA  
- Very positive experience across ESA for both Service Line and Dedicated service models



Colin Hinsley, Program Director, NTP  
- Very satisfied with EPC Finance Management, Agile DevOps support for the program and the automation initiatives



Davesha Sharma, Program Director, RPA CoE  
- EPC Offshore Service Line support, Agile support via dedicated analyst and overall EPC engagement



Mark Mundo, Program Manager, GOO IT&S  
- Excellent service across GOO portfolio financial management and controls



Michael Berni & Wendy Wen Chyi Tsng, APAC Cluster Leads  
- Very positive experience on both offshore and onshore EPC models, setting up of Agile Programs, adaptability and continuous improvement initiatives



Lynn Farmer, Senior Security Portfolio Manager, Digital Security  
- Very delighted having engaged EPC, Impressed with the high standards and values of the team



Sam Thomas, BP EPC SPOC and Enterprise Performance Lead  
- EPC Automation journey and continuous improvements as the key element as in the service. 65% of the service areas are enabled through automation

Please click here to watch customer testimonial videos

# What is the EPC Service Line remit?

- Project Types

- The EPC Service Line can service all IT&S projects approved by Strategy and Architecture included in the investment portfolio, these are broken down into the following sizes
  - Small - \$50K to \$1M
  - Intermediate - \$1M to \$10M (Broken into three sub areas for pricing \$1-2M, \$2-5M, \$5-10M)
  - Large - >=\$10M

- Services

EPC Service Line (SL) SL Accountability	Project PM/ Project Team accountability	Portfolio, EPC Supporting Functions Portfolio/ Supporting Function Accountability
<ul style="list-style-type: none"> <li>Project Support, Assurance &amp; Reporting               <ul style="list-style-type: none"> <li>Financial Management (<i>Budget Tracker/ EEM*</i>)</li> <li>Planning &amp; Scheduling (<i>Project plan, Product Backlog*</i>)</li> <li>Risk &amp; Issue Management (<i>R&amp;I Log*</i>)</li> <li>Resource Management (<i>Resource database*</i>)</li> <li>Performance Management (<i>Status reports, Agile Reports*</i>)</li> <li>Governance (<i>Audit/ Health-check reports*</i>)</li> <li>Knowledge Management (<i>Project Workspace*</i>)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Business Case/ Benefits</li> <li>Project Management function</li> <li>Project delivery</li> <li>Project deliverables (<i>based on Waterfall RouteMap</i>)</li> <li>Administrative Activities</li> </ul>	<ul style="list-style-type: none"> <li>Defining the 'What' (<i>i.e. Project selection</i>)</li> <li>Portfolio Management</li> <li>Benefits Management</li> <li>Administrative Activities</li> </ul>

\* EPC deliverables per project  
Specific to Agile Projects

Refer to EPC [accountability](#) slides in appendix for details

# What changes? - Example Risk and Issue Management

As-Is				To-Be		
Process	Activities	PM/ Project Team	Portfolio/ Supporting Function	PM/ Project Team	EPC SL	Portfolio/ Supporting Function
Risk & Issue Mgmt.	Risk & Issues Log content	Own		Own	Facilitate	
	Develop Risk & Issues Log	Own			Own	
	Frequent review/ updates of R&I Log	Own			Own	
	Tool sync	Own			Own	
	Analysis & Reporting				Own	
EPC will improve risk management through frequent updates and proactive monitoring, analysis & reporting						

## Historic pain points

- Risks usually documented at the start of the engagement
- New risks often identified on status reports but not assessed and mitigated
- Often mitigation actions not tracked and preventable risks realised and/or impacts not reduced
- Often maintenance of risks only performed to support DSP gates causing spikes in administrative tasks for PM

## Opportunities with EPC PMO

- Standard templated risk log created by EPC at initiation and reviewed with PM
- Regular risk review meetings established and tracked
- Proactive risk management by EPC via status and performance reporting
- Standard risk reports available on demand and kept up to date throughout project lifecycle

Refer to EPC [accountability](#) slides in appendix for details



# EPC Offerings By Service Area



EPC as part of the standard service offering will cater the following 7 service areas. Each service area has a set of identified tasks to be performed by EPC at a defined frequency based on project size. The following table lists a summary of the overall tasks.

1	<b><u>Plan &amp; Schedule</u></b>	Create & Maintain WBS Create & Maintain Project Plan with dependencies Critical Path Analyze Schedule Risk Monitor & Control Schedule DevOps Tool setup Product Backlog Management Create & Maintain Product roadmap
2	<b><u>Risks &amp; Issues</u></b>	Risks / Issues Identification working with PM Risks / Issues Impact Assessment Risks / Issues Mitigation & Tracking ( POL and DevOps) Risk Tagging in DevOps Tool
3	<b><u>Performance</u></b>	Project Performance Reports Agile Metrics and Reporting
4	<b><u>Finance &amp; Contracts</u></b>	Create EEM Financial Tracking Accruals Reconciliation of Actuals with Forecast Contracts Submission via iNeed Cost code Requisition UFA Requisition
5	<b><u>Knowledge</u></b>	Monitor Project Deliverables' Upload Lessons Learned
6	<b><u>Governance</u></b>	Project Health Check for Stage Gate Meets, IT&S Reviews and Deep Dives Manage Project Calendar Updates Facilitate BP Policy compliance
7	<b><u>Resource</u></b>	JML Timesheet entry monitoring Maintain Resource Register

[Service Mechanism - Explained](#)

Specific to Agile Projects

# Enterprise Project Capability (EPC) Services for Agile Delivery



Total of ~250 projects/activities/programs in IT&S under EPC service and >30% of them are Agile. We analyzed these projects and tailored our service offerings for Agile Delivery

## EPC has been providing services to Agile Projects on request

Provided recommendations and POV to Leadership



Collaboration with leadership, agile practitioners and BP agile coaches for feedback



EPC Team trained and certified on agile and EPC agile offerings



- ✓ Launched in Jun 2019
- ✓ Onboarded multiple portfolios/services since launch
- ✓ Continuous adaptation based on customer feedback



### Program Setup

- Setup Azure DevOps
- Setup product teams
- SPOC for ADO queries



### Agile Performance Reporting

- Maintain Agile metrics
- Setup Dashboards
- Insights in the LT meetings

## EPC Agile offering\*



### Product Backlog Management

- Releases & Roadmap setup
- Product Backlog maintenance
- RAID management



### Agile Ceremony Participation

- Sprint planning
- Sprint Retrospective
- Scrum of scrums

### Service Assurance

- Agile delivery assurance checks reviewed with Agile coaches and pilot rolled out for some of the engagements

## Benefits

Strategic and Ops Insight and Decision enabling support



### Operation Excellence



Improved cycle time



Standardising Ways of working

### Seamless Collaboration



Best practices and learnings

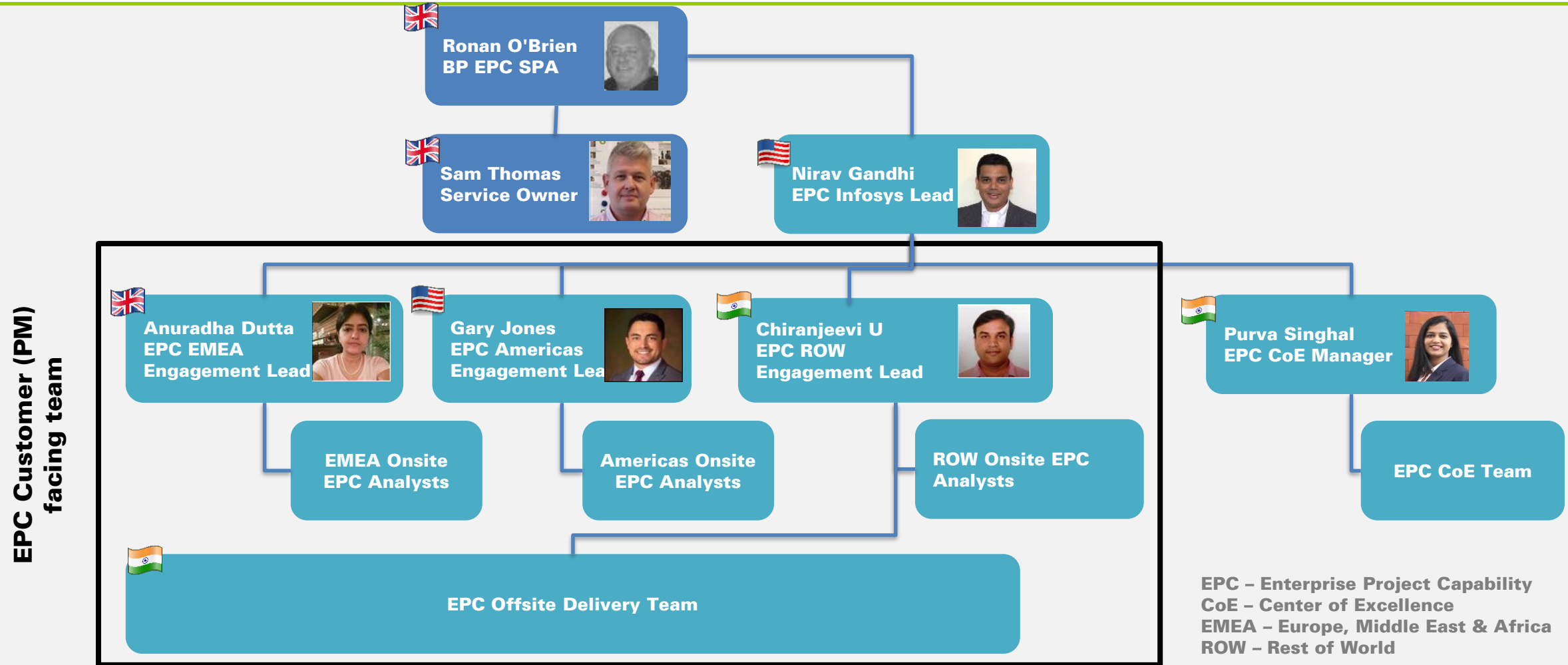


Co-located PMO support

\*1. EPC Services for Finance Management, Contracting and Resource Management aligns to current BP Processes

\*2. EPC is providing this service through Dedicated Staff service model

# Who do I interact with? - EPC Service Line Organization



# How will the Service Line engage and support my project?



## Track I: EPC SERVICE DELIVERY

**EPC service initiates once project is approved by S&A.**

**EPC will deliver project support & assurance services throughout project lifecycle**

### Step 0: EPC Engagement

- EPC Overview
- EPC Service Models and contacts
- EPC Lifecycle
- EPC Service charge back model

### Step 1: On-Boarding

- Project(s) validated in Project Online (key roles, finances, dates)
- Project awareness session
- Project Delivery (Agile /Waterfall) agreed
- EPC awareness
- EPC Service Model agreed
- Project Questionnaire completed
- Initiation/Transition plan agreed (Target Execution date established)
- Registration date agreed (service commencement)

Registration date  
Billing starts

### Step 2: Initiation (New)

- PM Zone in Project Online configured
- Project deliverables list finalized (T&W)
- Project calendar finalized
- Deliverables baselined and document control initiated

### Step 2: Initiation (Transition)

- **Existing PMO – EPC gap analysis**
- **Migration to EPC processes and controls**
- PM Zone in Project Online configured
- Project deliverables list finalized (T&W)
- Project calendar finalized
- Deliverables baselined and document control initiated

### Step 3: Execution

- Execute against Project Calendar (Monitor & Control)
- Maintain EPC deliverables and trackers
- Report status and metrics
- Conduct Assurance Reviews
- Plan Closure activities

### Step 4: Closure

- Finalize Project and EPC deliverables
- Finalize Lessons Learnt
- Transition Benefit tracking
- Roll off resources
- Close out project finances

Entire Project Lifecycle

## Track II: EPC CENTRAL SERVICES

EPC Service Engagement Lead meets with Project IT&S Mgr./ PM once their project is approved by S&A governance

In parallel, EPC will promote process compliance, improve maturity via Continuous Improvement (CI) and provide portfolio level reports/insights

EPC DELIVERY PHASES (Initiation/Transition, Execution, Closure)

CoE Process Design & Deployment

Quality Assurance

Reporting & Insights

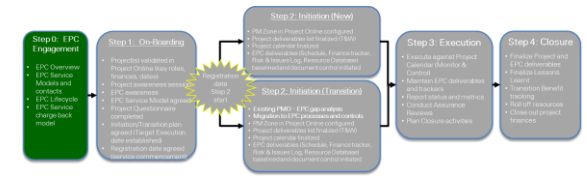
Continuous Improvement (Process & Tools)

Governance

Customer Feedback

\* S&A = Strategy & Architecture (Portfolio Mgmt.)

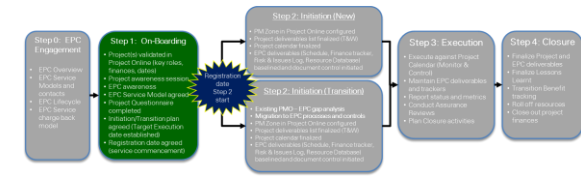
# Step 0: EPC Engagement - commitment to proceed to Onboarding



- **Objective**
  - Introduce the EPC Service Line to the IT&S project community, especially Project Managers/ Program Managers/ Cluster Leads/ Service Owner, who will be the target customers of this services and high level view of the number of projects using the service
  - Enable a Project Manager/ Service Owner to decide if they are ready to engage with the EPC
- **Asks of the Project Manger**
  - Identification of Project ID(s) in Project Online
  - Project/Program overview - scope, accountabilities, type, structure
  - Confirmation of project status and phase (and any incumbent PMO, existing artefacts/deliverables)
  - Confirmation on Project Delivery type – Agile or Waterfall
  - Onsite and/or Offsite EPC service request
  - Commitment to proceed to On boarding
- **Tells from the EPC Regional Engagement Lead**
  - EPC Portal link and briefing pack
  - Indicative timeline to start On boarding
  - Indicative costs and when EPC billing commences
  - Project questionnaire - offline template to complete during On boarding
- **Outcomes**
  - Project Manager / Program Manager / Service Owner has a high level understanding of the EPC service
  - Agreement to proceed to On Boarding Phase
  - Project questionnaire - offline template sent for completion



# Step 1: EPC On-boarding - Registration and agreement to commence service



- **Objective of Phase**
  - Establish a common understanding of the scope and size of the Engagement
  - Confirm the EPC service model, services and charges for the Engagement
  - Agree on responsibilities and target timeline for the completion of the Initiation or Transition Phase required to establish steady-state Execution
  - Establish the Registration date for services (and start of EPC charges)
- **Asks of the Project Manager**
  - Complete and approve the Project Questionnaire(s) for identified projects
  - Project(s) identified and details in Project Online validated
  - Agree any exception Tailor and Waiver of the standard EPC services
  - Confirm any migration or PMO transition requirements
  - Accept and understand PM responsibilities and commitments to support the timeline for Initiation/Transition
  - **Confirmation to move to Initiation/Transition**
- **Tells from the EPC Service Delivery Team**
  - EPC delivery processes, deliverables and trackers briefing
  - EPC central services briefing (assurance, continuous improvement (CI), governance)
  - EPC tools demo (Project Online, PM Zone, Dashboards and Reporting)
  - EPC Initiation/Transition phase timeline planning and estimation (including any migration and PMO transition)
- **Outcomes**
  - EPC services confirmed (i.e. standard service or any exception tailor/waiver agreed)
  - EPC service model and costs confirmed (Offsite Service Line, Dedicated Resource or combination)
  - Project(s) identified as Initiation (New or Transition)
  - EPC Plan for Initiation/Transition phase agreed with target Execute phase date
  - Agreement on Registration Date - to commence the Initiation phase and start of billing for the service and capture Registration End Date
  - Project Manager email confirming project size and committing to costs and registration date

# EPC Indicative Pricing

**EPC Dedicated Resource Service** pricing is based on fixed monthly charges for assigned named resources at a base location

- All rates are fully inclusive of any expenses at that location but are not T&M
- EPC dedicated resource service can only be provided as full time resources (i.e. you must contract for a 100% FTE) however these may cover multiple projects and the costs split
- There is no equivalent bulk discount for dedicated resources

**EPC Offsite Service Line** pricing is based on fixed monthly charges that vary by the approved IT&S project funds and an BP wide volume discount

- the model is not based on assigned resources (this is a factory model)
- The table shows the base EPC Service charge ranges for each project size for 2020
- The EPC Service Line cost model also incorporates a bulk discount dependent on the total number of projects of each size serviced across the EPC on a monthly basis

Base Location	Monthly Fee (FY 2020*)
Houston, Chicago	USD 15,409
Bochum, Melbourne	USD 15,332
Aberdeen, London	USD 15,641
Budapest	USD 13,440
Kuala Lumpur	USD 12,424
Bangalore	USD 6,807

Project Size Category	Approved IT&S Project Funds	Monthly Fee Range (FY 2020*)
Small	< 1m USD	USD 438 – 959
Intermediate 1	1m to 2m USD	USD 621 – 1,357
Intermediate 2	2m to 5m USD	USD 1,284 – 2,807
Intermediate 3	5m to 10m USD	USD 1,287 – 2,888
Large	>= 10m USD	USD 2,404 – 5,841

Rates are updated each financial year\*  
See Appendix for definition of Approved IT&S Project Funds

# Recap



- **Purpose**
  - Introduce the EPC service
  - Inform how the EPC will change the way PMO services are provided to the community and who will be the key delivery contacts
  - Demonstrate how these changes will improve Project Manager productivity by reducing PM time spent updating documentation and trackers, administering project support and reporting activities allowing them to focus on project delivery, management of risk and stakeholder management
- **Your Project – Next Steps**
  - Are you ready to move to On-boarding the EPC Services?



# APPENDIX

# Version History - 1 / 2

#	Version Description	Creation Date	Author(s)	Approved On	Approver(s)
3.0	Updated Engagement Pack to include new structure of EPC Service Line	30-Jun-2017	Michael Hadwin	30-Jun-2017	Ronan O'Brien
V CI 70	Corrected the pricing value for Intermediate 1 Project Category	11-Jul-2017	EPC CoE	11-Jul-2017	Michael Hadwin
V CI 157, 127	Updated to reflect the registration date decision by BP LT (meeting on 11-Aug-2017)	21-Sep-2017	Michael Hadwin	29-Sep-2017	Sam Thomas Nirav Gandhi
	Updates to reflect "Project Fund Terminology" and minor Org Chart updates and feedback from Sam and Jill	21-Sep-2017	Michael Hadwin	29-Sep-2017	Sam Thomas Nirav Gandhi
V CI 192	Added Registration End Date as part of Onboarding Outcome	08-Nov-2017	Sonali Dutta		Nirav Gandhi
V CI 234	Rate (price) review - yearly update for the year 2018	11-Dec-2017	Nirav G/ Arun A Ganesh S	11-Dec-2017	Jill S
V CI 235	Update EPC Service Line Org Chart in Engagement Pack to reflect the current team	13-Dec-2017	Sonali Dutta		
V CI 247	Include Engagement pack with EPC SL Price slab slide (#21)	19-Dec-2017	Ganesh S		
V CI 279	Update EPC project size calculation definition for large project (Slide #11, #22)	29-Jan-18	Ganesh S		
V CI 303	Update Engagement pack to incorporate "Route map" related changes rolled out by BP	20-Feb-18	Ganesh S		



# Version History - 2/2

#	Version Description	Creation Date	Author(s)	Approved On	Approver(s)
V CI 311	Updated Org Chart in Engagement Pack for EMEA Engagement Lead	2-Mar-18	Sonali Dutta		
V CI 410	Updated Org Chart for America Engagement Lead and COE Lead	27-Jul-18	Ranjan Sham		
V CI 429	Include a slide of EPC joinery and the value delivered Updated with latest Rate charts for 2019	18-Dec-18	Ranjan Sham		
V CI 433	Revised rate card for EPC services incorporated based on Andrew Price communication	22-Jan-18	Sathya		
V CI 438	Revised for Agile offerings and Chiru as the new Service Delivery Lead	15-May-2019	Ranjan		
V CI 457	Update Service Line Organization structure Update Engagement Pack with CSAT survey result and new Projects	9-Sep-2019	Purva Singhal		
V CI 629	Updated Sam's new role and replace Karl with Ronan, CSAT, project count and other stats as applicable Added EPC offering by Service Area	11-Oct-2019	Purva Singhal		
V CI 460	Price revision (yearly increment) related update in Engagement & Onboarding Pack	26-Nov-2019	Purva Singhal		
V CI 661	Update Portfolio details and Agile offering	03-Feb-2020	Purva Singhal		

# Project vs. EPC Service Line Accountabilities (I of III)

		<i>As - Is</i>		<i>To - Be</i>		
Process	Activities	PM / Project Team	Portfolio / Supporting Function	PM / Project Team	EPC	Portfolio / Supporting Function
<b>Portfolio</b>	Project selection/fund allocation		Own			Own
	Portfolio mgmt.		Own			Own
<b>Project</b>	Project Management function	Own		Own		
	Project delivery	Own		Own		
<b>Start-Up/On-Boarding</b>	Administrative Activities(ex.HSSE,badging,action tracking, etc.)	Own		Own		
	Project Mgmt/PMO Process,standards,metrics,best practices, etc.	Own			Own	
	Project Mgmt/PMO tools selection, set-up	Own			Own	
	PMO sourcing (capabilities, rates, contracts, training, etc.	Own			Own	
<b>Finance &amp; Contracts</b>	EEM & Finance tracker content	Own		Own	Facilitate	
	Develop/ Update/ Maintain EEM, Finance Tracker	Own			Own	
	Tool sync	Own			Own	
	Develop/Update Business Case, FM	Own		Own		
	Benefits Mgmt.		Own			Own
	SAP reconciliation, Accruals	Own			Own	
	Budget & FM variance analysis, Reporting & Dashboards	Own			Own	
	Create contracts (UFA / iNeed), Handle IP/Vendor negotiations, Contract Submission	Own		Own		
	Status/follow-ups, schedule/budget integration	Own			Own	
	Schedule and finance tracker updates from contractual agreements	Own			Own	
	Invoice submission and approval	Own		Own		
<b>Risk &amp; Issue Mgmt.</b>	Risk & Issues Log content	Own		Own	Facilitate	
	Develop/ Update Risk & Issues Log	Own			Own	
	Tool sync (Project Online for Waterfall and Azure DevOps for Agile)	Own			Own	
	Analysis & Reporting	Own			Own	

# Project vs. EPC Service Line Accountabilities (II of III)

Process	Activities	As - Is		To - Be		
		PM / Project Team	Portfolio / Supporting Function	PM / Project Team	EPC	Portfolio / Supporting Function
Resource Mgmt	Execute JML	Own		Own (shared)	Own (shared)	
	Maintain resource database	Own			Own	
	Time-writing	Own			Own	
Knowledge Mgmt.	Lessons Learnt content	Own		Own	Facilitate	
	Develop Lessons Learnt and tool sync	Own			Own	
	Project (Deliverables)workspace creation, folder structure, permission, etc.	Own			Own	
	BP and other project deliverables lifecycle mgmt. (Creation, Approval, Workspace mgmt)	Own			Own	
	BP deliverable management in conjunction with BP policy shall statements and RouteMap	Own		Own		
	Document lifecycle audit/report (ex. Define phase deliverables signed off)	Own			Own	
Governance	Tailor and Waiver process- Project deliverables by phase	Own			Own	
	Deliverable audit(Schedule, Finance tracker, Risk & Issue Log)	Own/Gap			Own	
	EPC Deliverable Assurance (Ensure EPC services are delivered on time and quality)				Own	
	Project health checks at stage gates, FAR	Own/Gap			Own	
	Operations handover	Own		Own		Own
	Monitor/audit Operations handover	Own			Own	
	Audit gaps closure (Deliverable audit, Health checks, Operations handover)	Own		Own (shared)	Own (shared)	
	Project recovery	Own		Own		

# Project vs. EPC Service Line Accountabilities (III of III)

		<i>As - Is</i>		<i>To - Be</i>		
Process	Activities	PM / Project Team	Portfolio / Supporting Function	PM / Project Team	EPC	Portfolio / Supporting Function
<b>Performance Mgmt. (Waterfall)</b>	Status report content (RAG commentary/justification)	Own		Own	Facilitate	
	Validate RAG justification & update RAG details on Project Online	Own			Own	
	Project/portfolio level metrics , reporting, insights	Partial	Partial		Own (shared)	Own (shared)
<b>Performance Mgmt. (Agile)</b>	Maintain and support Agile Metrics	Own			Own	
	MI Insights and LT Level Meeting reports	Own			Own	
	Project / portfolio level metrics, reporting insights	Partial	Partial		Own (shared)	Own (shared)
<b>Plan &amp; Schedule (Waterfall)</b>	WBS, Schedule, Dependencies content	Own		Own	Facilitate	
	Create/Update/Maintain WBS, schedule, dependencies	Own			Own	
	Change control identification and justification	Own		Own		
	Change control documentation, re-baselining	Own			Own	
	Analysis & Reporting (variance, critical path, risks, KPIs, etc.)	Own			Own	
<b>Plan &amp; Schedule (Agile)</b>	DevOps Tool setup	Own			Own	
	User Story Mapping, MVP	Own		Own	Facilitate	
	Create and Update Product Roadmap, Dependency Log, Product Backlog	Own		Own	Facilitate	
	Capacity Planning Reports	Own			Own	

# EPC SL Services frequency, deliverables and tools - I of IV



ID	Process Area	Process Steps	INITIA- TION	EXECUTION									Deliverables (in EPC SL scope)	Tools
				Weekly			Monthly			Quarterly				
			(all sizes)	S	I	L	S	I	L	S	I	L		
1	Plan & Schedule Management	Create a schedule.											<ul style="list-style-type: none"><li>• Project Plan</li><li>• Reports</li></ul>	<ul style="list-style-type: none"><li>• Project Online</li><li>• PM Zone</li><li>• EPC Portal – Multiple Trackers</li></ul>
2		Maintain MS Project schedule.												
3		Maintain and check the PlanView / MSPS schedule sync.												
4		Create and maintain a work breakdown structure												
5		Log and maintain project dependencies.												
6		Utilise the Tailor and Waiver process.												
7		Baseline management.												
8		Schedule change control.												
9		Schedule risk analysis.												
10		Critical path reporting.												
11		Resource levelling and allocations.												
12		Variance reporting.												
13	Risk & Issue Management	Manage the BP Risk and Issue (R&I) process including workshops.										<ul style="list-style-type: none"><li>• RAID (<i>Risks, Assumptions, Issues, Dependencies</i>) Log</li><li>• Reports</li></ul>		
14		RAID log creation.												
15		RAID log maintenance.												
16		Facilitate R&I conversations including making the PM aware of any R&I that the PMO independently identify.												
17		Relate R&I to the schedule - which milestones/phases are at risk.												
18		Project/ programme R&I aggregated review - identification of trends and systemic risk.												
19		Prepare R&I data for key reporting/meetings in year e.g. QPR, FAR, etc.												
20	Resource Management	Execute the BP joiners, movers and leavers' processes.										<ul style="list-style-type: none"><li>• Resource database</li><li>• Reports</li></ul>		
21		Own and maintain the headcount information for each project - provide reports as required.												
22		Own and maintain the resource database for all IT&S personnel within BP GPD/other planning tools.												
23		Ensure time writing for all resources is complete within required timescales.												
24		Maintain resource management tools, processes, reporting and forecasting (scenario modelling - linked to financial modelling).												



# EPC SL Services frequency, deliverables and tools - II of IV



ID	Process Area	Process Steps	INITIA- TION  (all sizes)	EXECUTION									Deliverables (In EPC SL scope)	Tools
				Weekly			Monthly			Quarterly				
				S	I	L	S	I	L	S	I	L		
25	Performance Management	Facilitate the creation and maintenance of all performance management reports.										<ul style="list-style-type: none"><li>Project Status reports</li><li>Project Plan to include build &amp; configuration, testing and cutover activities</li></ul>	<ul style="list-style-type: none"><li>Project Online</li><li>PM Zone</li><li>EPC Portal – Multiple Trackers</li></ul>	
26		Responsible for pro-actively gathering and consolidating MI at all levels: status, schedule, \$, resources, risk, issues, benefits and commentary.												
27		Responsible for providing and producing MI 'insights' - liaise with the delivery community to produce in depth commentary.												
28		Help prepare all levels for LT level reporting - e.g. FAR, QPR, direct reports, Boards etc.												
29		Responsible for the planning, tracking and reporting of build and configuration objects (e.g. RICEF)												
30		Responsible for the planning, tracking and reporting of all testing activities (string, integration, UAT, performance etc.)												
31		Responsible for the planning, tracking and reporting of all cutover activities.												
32		Create and maintain project metric reporting.												
33	Governance	Responsible for providing assurance services.										<ul style="list-style-type: none"><li>Audit/ Health-check reports</li><li>Service Calendar (governance framework)</li></ul>		
34		Define, document and maintain Governance framework												
35		Coordinate and consolidate data for the Finance and Assurance Review (FAR) process where applicable.												
36		Ensure all projects follow BP policies and procedures.												
37		Support project deep dives as required.												
38		Ensure projects are closed inline with BP policies and procedures.												
39		Responsible for the functional support of BP's tools, ensuring tooling standards and templates are used across project teams - 4 week rota training.												

# EPC SL Services frequency, deliverables and tools - III of IV



ID	Process Area	Process Steps	INITIA- TION	EXECUTION									Deliverables (in EPC SL scope)	Tools
			(all sizes)	Weekly			Monthly			Quarterly				
				S	I	L	S	I	L	S	I	L		
40	Knowledge Management	Responsible for establishing and setting up the structure within the repositories to manage the life cycle of documents.											<ul style="list-style-type: none"><li>Project Workspace</li><li>Soln. Mgr. documents (SAP only)</li></ul>	<ul style="list-style-type: none"><li>Project Online</li><li>PM Zone</li><li>EPC Portal – Multiple Trackers</li></ul>
41		Responsible for managing the creation, development, approval, change, distribution, maintenance, use, storage and disposal of documents.												
42		Responsible for managing the archiving of project documents for long-term retention and regulatory compliance at the close of the project aligned to BPs policies and procedures.												
43		Responsible for capturing, validating and recording lessons learned in Knowledge Exchange.												
44		Responsible for ensuring that all Solution Manager documents are updated and complete at project closeout for SAP related projects												
45	Financial & Contract Management	Facilitate the creation and maintenance of the EEM for all projects and programmes.											<ul style="list-style-type: none"><li>EEM/ Budget Tracker</li><li>Reports</li></ul>	<ul style="list-style-type: none"><li>Project Online</li><li>PM Zone</li><li>EPC Portal – Multiple Trackers</li><li>Segment specific Finance tools (TBD)</li></ul>
46		Facilitate the creation, building and maintenance of financial plans at all levels.												
47		Prepare and submit quarterly financial data, consolidation, verification and reporting - Accruals, GCRT, GFO (Quarterly) analysis and reporting.												
48		Prepare and submit monthly financial reports/dashboards/external reports.												
49		Finance tool submission (FAST, Mini Model for example).												
50		Reconciliation of accruals and actuals.												
51		Monitor and record re-allocation of investment in year - project over/under-spend.												
52		FM tracking - assurance role to ensure FMs and the CVP process followed where applicable e.g. not applicable for GFO Capital Projects.												
53		PlanView data is updated as required.												

# EPC SL Services frequency, deliverables and tools - IV of IV



ID	Process Area	Process Steps	INITIATION	EXECUTION			Deliverables (in EPC SL scope)	Tools
				Weekly	Biweekly	Monthly		
59	Planning & Scheduling (Agile)	DevOps tools set up					Product Roadmap Product Backlog setup Capacity Planning Report	- Azure DevOps - Project Online - EPC Portal
60		Support in User story mapping and MVP as per business value						
61		Support PO to create and maintain Product Road Map						
62		Create and Maintain Initiatives/Goals/ epics/Product Backlog items in AzureDevops						
63		Log and Maintain project dependencies						
64		Create and Maintain Team Boards						
65		Maintain Product backlog						
66	Risk & Issue (Agile)	RAID log creation (Project/Program Level)					RAID Log	
67		RAID log maintenance (Project/Program Level)						
68		Risk tagging the Backlog item in Dev Ops Tool						
69		Project/programme R&I aggregated review - identification of trends and systemic risk						
70		Attend Scrum-Of-Scrums – Monitor risks, issues and dependencies						
71	Performance Management (Agile)	Setup Agile Reporting (includes One time workshop to identify the Program & Team Level Metrics/KPIs					Agile Metrics and Report	
72		Providing and producing MI 'insights' - liaise with the delivery community to produce in depth commentary.						
73		Help prepare all levels for LT level reporting - e.g. IT&S Review, QPR, direct reports, Boards etc.						

# EPC Indicative Pricing - Approved IT&S Project Funds

- EPC Offsite Service Line charges for an Engagement are based on the approved IT&S Project funds (minus any hardware purchases)
  - IT&S release funds for a project when it is approved to start from the IT&S overall budget with a sign off from the Delegate of Financial Authority (DoFA)
    - Any “White spend” is also agreed at the start of a project and is considered as part of the approved IT&S project funds
    - These funds can change during the lifecycle of the project (usually at project stage gates) and are usually for the current financial year (although some projects have multi-year approvals)
  - The EPC Offsite Service Line monthly charges are based on the size of the approved funds for the month the charges are incurred (minus any hardware purchases)
  - The approved spend is not usually the same as the total project spend until the later phase of the project



# EPC Price Per Project Per Month

Billing Count Range											
Year	Project Type	Billing Frequency	Billing Currency	Billing Unit	1-139	140-149	150-169	170-239	231-250	251-260	261-350
2020	SMALL	MONTHLY	USD	PER PROJECT	959	705	598	548	497	471	438
Billing Count Range											
Year	Project Type	Billing Frequency	Billing Currency	Billing Unit	1-34	35-39	40-44	45-55	56-60	61-65	66-80
2020	Intermediate-1	MONTHLY	USD	PER PROJECT	1,357	998	814	775	726	662	621
Billing Count Range											
Year	Project Type	Billing Frequency	Billing Currency	Billing Unit	1-34	35-39	40-44	45-55	56-60	61-65	66-80
2020	Intermediate-2	MONTHLY	USD	PER PROJECT	2,807	2,062	1,695	1,603	1,503	1,375	1,284
Billing Count Range											
Year	Project Type	Billing Frequency	Billing Currency	Billing Unit		1-8	9-11	12-17	18-21	22-30	
2020	Intermediate-3	MONTHLY	USD	PER PROJECT		2,888	2,286	1,650	1,324	1,287	
Billing Count Range											
Year	Project Type	Billing Frequency	Billing Currency	Billing Unit		1-4	5-6	7-13	14-15	16-20	
2020	LARGE	MONTHLY	USD	PER PROJECT		5,841	5,451	3,338	2,509	2,404	

PROJECT TYPE	PROJECT BUDGET
SMALL	< 1 million
INTERMEDIATE 1	1 million to 2 million
INTERMEDIATE 2	2 million to 5 million
INTERMEDIATE 3	5 million to 10 million
LARGE	>= 10 million

**Notes:** Monthly billing rate will be based on number of projects serviced at end of the month  
 Once project is registered with EPC SL, Infosys will charge minimum of one month's fee for that project.  
 2-3 weeks of notice is required to on-board or off-board a project.  
 A month's fee will be charged for the project irrespective of the date it completes or gets cancelled in a particular month (there will no pro-rating of unit charge)  
 Project budget : Approved project budget by Strategy and Architecture Board

