

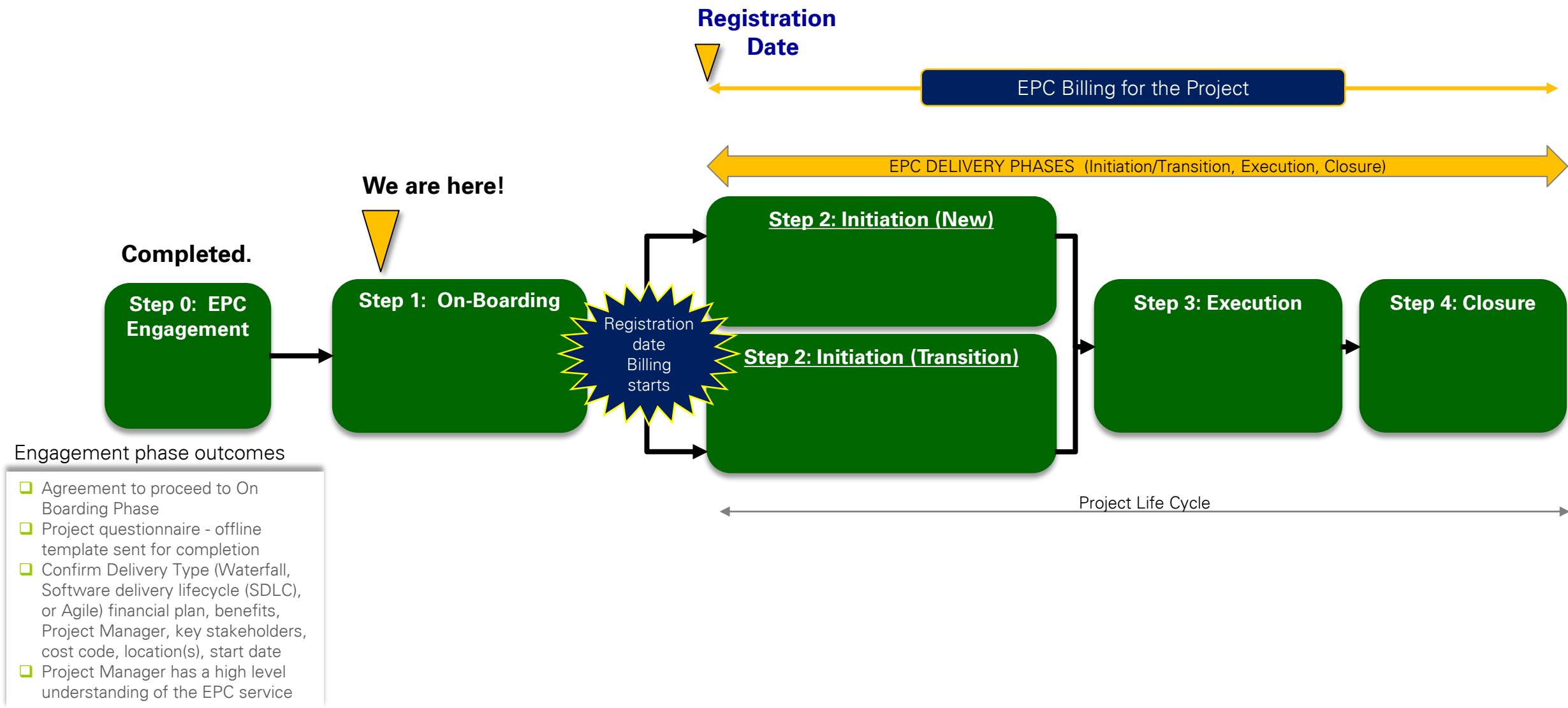
# **BAS EPC (Enterprise Project Capability) Service Line**

Project Onboarding Pack

15-May-2019

# **EPC ONBOARDING PHASE**

# EPC Engagement Phase *Recap*



# EPC – Onboarding Phase



## Objectives

### ❑ EPC Awareness (for PM)

- What are EPC Service Area Offerings
- What are EPC Central Services
- Introduction to EPC Tools

### ❑ Project Understanding (for EPC)

- Confirm Project Delivery Type ( Waterfall or Agile)
- Confirm EPC Service Area
- Confirm Service Model, Establish Project Value and EPC Project Size
- Confirm Project status – New or Transition
- Initiation/ Transition Completion Plan, Review Project Questionnaire for clarifications
- Confirm on Registration date

### ❑ Agree on Next steps



## Outcomes

### ❑ EPC Services ready to commence

1. Project Delivery type (Waterfall or Agile) confirmed
2. EPC services confirmed (i.e. standard service or any exception tailor/ waiver agreed).
3. EPC service model and costs confirmed (Offsite Service Line, Dedicated Resource or combination).
4. Project(s) identified as Initiation (New or Transition).
5. EPC Plan for Initiation phase agreed with target Execute phase date.
6. Agreement on Registration Start and End Dates - to commence the Initiation phase and start and end of billing for the service.
7. Project Manager email confirming project size and committing to costs and registration date.

# EPC Awareness – 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](#)

# EPC Awareness – EPC Templates And Deliverables By Service Areas



EPC shall follow the standard template for respective deliverables to seek content inputs from project PM/ PM representative to update and maintain them in Project Online as per the defined frequency

#	Service Area	Template / Guideline Name	Deliverable Name
1	Planning and Scheduling	<ul style="list-style-type: none"><li>▪ Work Breakdown Structure</li><li>▪ Project Plan</li><li>▪ Azure DevOps guide</li><li>▪ Product Roadmap guide</li><li>▪ Product Backlog Management guide</li></ul>	<ul style="list-style-type: none"><li>▪ Project Plan (schedule) incorporating WBS</li><li>▪ DevOps Tool setup</li><li>▪ Product Roadmap</li><li>▪ Product / Project Board</li></ul>
2	Risk & Issue Management	<ul style="list-style-type: none"><li>▪ Risk &amp; Issue Register</li></ul>	<ul style="list-style-type: none"><li>▪ Risk &amp; Issue Register – POL</li><li>▪ Risk &amp; Issue tracker – Azure DevOps</li></ul>
3	Performance Management	<ul style="list-style-type: none"><li>▪ Power BI based</li><li>▪ DevOps Tool Based</li></ul>	<ul style="list-style-type: none"><li>▪ Project Performance Reports (Power BI based)</li><li>▪ Azure DevOps Dashboards</li></ul>
4	Finance & Contract Management	<ul style="list-style-type: none"><li>▪ Economic Evaluation Model (EEM)</li><li>▪ Finance Tracker</li><li>▪ Accruals</li><li>▪ Variance report</li></ul>	<ul style="list-style-type: none"><li>▪ EEM</li><li>▪ Finance Tracker</li><li>▪ Accruals</li><li>▪ Variance report</li></ul>
5	Knowledge Management	<ul style="list-style-type: none"><li>▪ Lessons Learned</li></ul>	<ul style="list-style-type: none"><li>▪ Lessons Learned</li></ul>
6	Governance	<ul style="list-style-type: none"><li>▪ Project Health Check</li></ul>	<ul style="list-style-type: none"><li>▪ Project Health Check Assessment</li></ul>
7	Resource Management	<ul style="list-style-type: none"><li>▪ Resource Register</li></ul>	<ul style="list-style-type: none"><li>▪ Resource Register</li></ul>

# EPC Awareness – EPC Central Services



EPC has a set of central services in order for the service line to effectively cater to the operational needs of the services and ensure the project stakeholders receive intended benefits thru out EPC service lifecycle

Central Services Name	Description
<a href="#">Service Change Process</a>	<ul style="list-style-type: none"> <li>▪ This process provides a way for PM to log change requests for the services that are not part of the EPC standard offering. EPC analyst logs this request on behalf of PM</li> <li>▪ The requests are processed and tracked via a tracker in EPC Portal (Service Change)</li> <li>▪ The requests are presented at BP governance forum for guidance on priority and approval. Based on the decision made by BP, the requests will be serviced by EPC</li> </ul>
<a href="#">Continuous Improvement (CI) Process</a>	<ul style="list-style-type: none"> <li>▪ This process provides avenues to improve EPC services based on the knowledge that we gather by working on various projects. This process (requests) overtime would bring in more services into the standard offering based on the request trend. The requests are processed and tracked via the same tracker, as above (Service Change)</li> <li>▪ The requests are presented at BP governance forum for guidance on priority and approval. Based on the decision made by BP, the requests will be serviced by EPC</li> </ul>
<a href="#">Escalation Process</a>	<ul style="list-style-type: none"> <li>▪ The process provides a way for PM/ EPC analysts to log concerns on service expectations</li> <li>▪ Provides visibility to BP governance to facilitate issue resolution and install checks, to keep the SL line functioning effectively</li> <li>▪ The requests are processed and tracked via a tracker in EPC Portal (Escalation Process)</li> </ul>
<a href="#">Assurance Process</a>	<ul style="list-style-type: none"> <li>▪ This is a EPC Service line process to ensure that all the EPC defined tasks are executed and deliverables are updated as per the defined process and frequency</li> <li>▪ The Assurance process uses checklist to conduct audit, log gaps and track them to closure working with PM</li> <li>▪ During the EPC Execute phase, the assurance process will ensure if Stage gate Project Health Checks, IT&amp;S Reviews, QPRs as applicable were successfully conducted by the project</li> <li>▪ EPC assurance score provides the PM the <a href="#">assurance score</a> for a project (# of checks passed / # of assurance checks performed)</li> </ul>
Center of Excellence (COE)	<ul style="list-style-type: none"> <li>▪ COE designs process for service areas and identify/ Implement service area improvements and best practices.</li> <li>▪ It manages the continuous improvement process for EPC working with BP EPC governance team</li> <li>▪ It is also tracks process compliance so as to improve service line maturity over time</li> </ul>

# EPC Awareness – EPC Tools – 1/ 4

## Project Online



One stop place for PMs with all project information & workspace to manage the project & its deliverables. It is a place where all the project documents/ deliverables are maintained.

Project Online remains as the 'single source of truth' for project related details. And is used for managing the EPC service areas

- Project Details - Plan, Schedule, Milestones, Forecast, Benefits, Dashboard
- Risks Tracker, Issues Tracker – Capture and track Risk & Issues of the project
- Decision Tracker – To maintain & track the decisions made as part of the project
- Actions Tracker – To manage action items for the project
- Request Tracker – To manage and track request items for the project
- [Project Calendar](#) – To plan EPC activities of the project ahead and provide visibility of activities to the project calendar

## Project Online:

GOO Collab Reengineering project

Home

Project Details

Risks

Issues

Decision

Actions

Change Log

Request Tracker

Documents

Calendar

Dashboard

Operate due in 2 days

Deliverable Name	Deliverable Type	CVP Stage	Deliverable Status	Deliverable Audit Status	Deliverable Approval status	Status	Owner
Testing			Completed			Green	Nata
TOR			WIP			Yellow	Ram
Functional Specification			Completed			Green	Ram
Project Plan			Not Conducted			Red	Ram
Detailed design document			Not Applicable			Green	Ram
High Level design			WIP			Yellow	Ram
Requirements document			Completed			Green	Nata
Risk & Issue Register	EPC	Define	Draft	WIP	Not Applicable	Yellow	Nata
Baselined WBS	EPC	Appraise	Draft	Completed	Approved	Green	Nata

Request Tracker

new item or edit this list

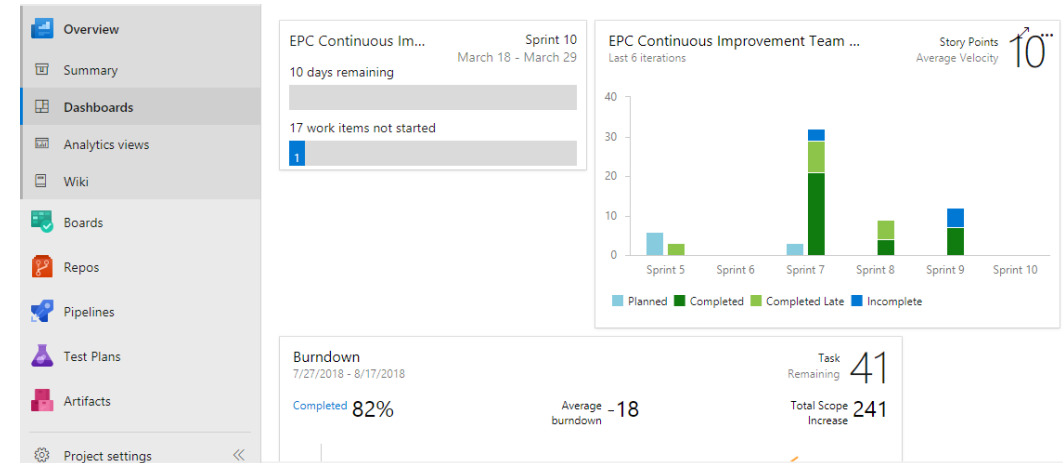


# EPC Awareness – EPC Tools – 2/ 4

## Azure DevOps



- One stop place for PMs with all project information & workspace to manage Agile projects & its deliverables
- Track Work through Boards, Reports, Dashboards, Add-on tools such as SpecMap, Dependency Tracker
- Track all your ideas at every development stage and keep your team aligned with all code changes linked directly to work items.
- Scrum ready : Use built-in scrum boards and planning tools to help your teams run sprints, stand-ups, and planning meetings.
- Built for insights : Gain new insights into the health and status of your project with powerful analytics tools and dashboard widgets.



# EPC Awareness – EPC Tools – 3/ 4

## EPC Portal

One stop place for EPC analysts & PMs with your engagement information for the services rendered as part of EPC offering.

The project related information are pulled from Project Online where required to service the project. It provides an overview of

- EPC services and Access to EPC central services
- [EPC Service Areas](#): provides description of all the 7 service areas detailing the accountabilities and the activities performed by EPC
- [Escalation](#): provides description of escalation process and how it is managed and tracked through to resolution using a tracker
- [Service Change](#): provides description of the process and how it is managed and tracked through to closure using a tracker
- [Assurance Process](#): provides description of Assurance activities performed by the EPC SL team for the services provided
- [EPC Communications](#): provides information such as FAQs, Communications/ Notifications (incl. archives) for EPC Team
- [Dashboards](#): provides overview of projects being serviced by EPC & the quality of service delivery based on Assurance process



## EPC Portal

# EPC Awareness – EPC Tools – 4/ 4

## Project Performance Reports



When project moves to EPC Execute phase, the following reports are available to the Project Manager (PM) based on the data captured in respective Project Online deliverable sources

#	Project Report Name	Description / Comments	<a href="#">Power BI</a>
1	Financials	<ul style="list-style-type: none"><li>Provides forecast against plan; Data sourced from Finance tracker</li><li>EPC Analyst will update finance data in Project Online as per Project Calendar</li></ul>	
2	Key Milestones	<ul style="list-style-type: none"><li>Provides view of Key Milestones captured in Project Online Project Plan (Schedule)</li><li>EPC Analyst will update key milestones data in Project Online as per Project Calendar</li></ul>	
3	Risk	<ul style="list-style-type: none"><li>Provides view of risks that have been logged in Project Online R&amp;I Register</li><li>EPC Analyst will update risk data in Project Online as per Project Calendar</li></ul>	
4	Issue	<ul style="list-style-type: none"><li>Provides view of issues that have been logged in Project Online R &amp; I Register EPC Analyst will update issues data in Project Online as per Project Calendar</li></ul>	
5	Benefits	<ul style="list-style-type: none"><li>Represents the breakout of benefits by category, as well as a view of expected, forecasted, and achieved benefits; Data sourced from Finance tracker</li><li>EPC Analysts will update inputs received regarding Benefits as part of EEM in Project Online as per Project Calendar</li></ul>	
6	Project on a Page	<ul style="list-style-type: none"><li>Provides a summary snapshot of project performance on a page for the month</li><li>Data is sourced from Project schedule, R&amp;I register, Finance tracker in POL</li></ul>	
7	Programme on a Page	<ul style="list-style-type: none"><li>Provides a summary snapshot of programme performance on a page for the month. This is meant for Programme Managers</li><li>Data is sourced from Project schedule, R&amp;I register, Finance tracker in POL</li></ul>	
8	Timesheet (DA02)	<ul style="list-style-type: none"><li>Provide timesheet report (actuals data) of the project resources</li><li>Data is sourced from Time Writing application</li></ul>	

# EPC – Onboarding Phase



## Objectives

### ☐ **EPC Awareness** (for PM)



- What are EPC Service Area Offerings
- What are EPC Central Services
- Introduction to EPC Tools

### ☐ **Project Understanding** (for EPC)

- Confirm Project Delivery Type ( Waterfall or Agile)
- Confirm EPC Service Area
- Confirm Service Model, Establish Project Value and EPC Project Size
- Confirm Project status – New or Transition
- Initiation/ Transition Completion Plan, Review Project Questionnaire for clarifications
- Confirm on Registration date

### ☐ **Agree on Next steps**

# Project Understanding –

Asks from PM: EPC Service Area agreed for servicing – Exemptions & Inclusions



BP EPC services are standard offerings, in certain circumstances, where a business justification is provided, these can be tailored through a Service Change request that require BP approval before the commencement of EPC services

## Exemptions

#	Service Area Std. offering	Request Service Change (Yes/ No)	Business Justification comments
1	Planning & Scheduling		
2	Risks & Issues		
3	Finance & Contracts		
4	Knowledge Management		
5	Resource Management		
6	Project Governance		
7	Performance Management		

#	Additional Service Request (Activity description)	Part of Std. offering	Additional, Frequency	Comments
1	Sample: Help with Financial accruals on a monthly basis instead of quarterly	No	Yes, Monthly	
2	Sample: Help create and maintain an Integrated Program Plan	Yes	No, Weekly	

# Project Understanding –

Asks from PM: If the Preferred Service model is EPC Dedicated Resource Model?



EPC provides services basically in 2 models – Dedicated Resource Model & Service line Model. The 7 service areas supported however remain the same irrespective of the model preferred by the project

EPC Dedicated Resource Model charges are based on Resource base location

- **Project Location (Analyst)**
  - Capture the base Location from where the resource is expected to service the project.
- ✓ EPC Monthly Charges
  - ✓ Determine applicable EPC Monthly Charges

**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

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

Reference from Engagement discussion

# Project Understanding –

Asks from PM: If the Preferred Service model is EPC Service Line Model?



EPC provides services basically in 2 models – Dedicated Resource Model & Service line Model. The 7 service areas supported however remain the same irrespective of the model preferred by the project

EPC Service Line Model charges are based on EPC Project Size

▪ <b>Project Cost</b>	Capture the source of IT&S approved Project Funds Including white spend but excluding hardware costs with the correct DoA	
✓ EPC Project Size	✓	Capture project size based on above project value e.g. large, Intermediate
✓ EPC Monthly Charges	✓	Determine applicable EPC Monthly Charges

**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 2019
- 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

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

Reference from Engagement discussion

# Project Understanding –

## Asks from PM: Initiation/ Transition Start Date & Plan



New project (Initiation) or  
Ongoing (Transition) project

- ✓ Check if its an Ongoing project or a new project;
- ✓ Validate Project Online ID
- ✓ If transition for an Ongoing project, Capture current project stages

#	Service Area	Service Change (Yes/ No)	Initiation phase / Transition outcome (high level)	Start Date	End Date*	Comments
1	Planning & Scheduling		<ul style="list-style-type: none"> <li>Project plan baselined/ migrated</li> <li>Milestone updates in POL</li> <li>DevOps Tool setup</li> <li>Product Roadmap creation</li> <li>Product / Project Boards</li> </ul>	<Date>	<Date>	<ul style="list-style-type: none"> <li>Explain Plan template/ deliverable to PM</li> <li>Ask for data to populate</li> <li>If Transition: Gap Analysis, Migrate to EPC processes</li> </ul>
2	Risks & Issues		<ul style="list-style-type: none"> <li>Risks &amp; Issues captured/ migrated to POL / DevOps tool</li> </ul>			<ul style="list-style-type: none"> <li>Explain R&amp;I template/ deliverable to PM</li> <li>Ask for data to populate</li> <li>If Transition: Gap Analysis, Migrate to EPC processes</li> </ul>
3	Finance & Contracts		<ul style="list-style-type: none"> <li>EEM baselined/ migrated</li> <li>Finance tracker baselined</li> </ul>			<ul style="list-style-type: none"> <li>Seek inputs for EEM, Finance tracker deliverable to PM</li> <li>Ask for data to populate</li> <li>If Transition: Gap Analysis, Migrate to EPC processes</li> </ul>
4	Knowledge Management		<ul style="list-style-type: none"> <li>'Lessons learned captured/ migrated', if available</li> </ul>			<ul style="list-style-type: none"> <li>Check lessons learned are documented and are available</li> <li>Ask for data to populate</li> <li>If Transition: Gap Analysis, Migrate to EPC processes</li> </ul>
5	Resource Management		<ul style="list-style-type: none"> <li>Project resource details baselined</li> <li>Access to Project site, POL</li> </ul>			<ul style="list-style-type: none"> <li>Explain Resource template/ deliverable to PM</li> <li>Ask for data to populate</li> <li>If Transition: Gap Analysis, Migrate to EPC processes</li> </ul>
6	Project Governance		<ul style="list-style-type: none"> <li>Determine dates for Project health checks, IT&amp;S Reviews, if applicable</li> </ul>	<Date>	NA	<ul style="list-style-type: none"> <li>Check the current project stages, Applicability of PHC and IT&amp;S Reviews</li> <li>Probable dates for PHC &amp; IT&amp;S Reviews</li> </ul>
7	Performance Management		<ul style="list-style-type: none"> <li>Get access enabled to view project reports in POL</li> <li>Azure DevOps Dashboard</li> </ul>	<Date>	NA	<ul style="list-style-type: none"> <li>Introduce the Power BI based reports</li> </ul>

\*Estimated Target Duration: 2-3 weeks for Small projects; 3- 4 weeks for Intermediate/ Large projects

Specific to Agile Projects



# Project Understanding –

Asks from PM: Clarifications on Questionnaire, if any



Project questionnaire serves as a mechanism to capture specific project details for planning the EPC Initiation /Transition services ahead.

- Questionnaire Reviewed / completed will be finalized & closed during Initiation phase
- The finalized questionnaire will be used as inputs for initiating EPC Services as per the project delivery method (waterfall or agile) & EPC Gap analysis for Transition project

✓ **Is the Questionnaire completed?**

✓ **Any clarifications to be discussed?**

	A	B	C
1			Project Questionnaire
2	SL.No	Description	Response
3	1	Project Name	
4	2	Project Description	
5	3	Project ID	
6	4	Cluster	
7	5	Cluster lead	
8	6	Segment	
9	7	Programme	
10	8	Project Category	
11	9	Funding Method	
12	10	Total Sanctioned Value	
13	11	Business Alignment	
14	12	IT Alignment	
15	13	Project Start date	
16	14	Project End date	
17	15	Business sponsor	

Project Questionnaire

	A	B	C	
1	SL.No	PMO Service Track	PMO Service Outcome / Deliverable	Additional
2	1	Planning & Scheduling	Project Plan	What are the PMO responsibilities w.r.t. the Proje
3	2	Planning & Scheduling	Project Plan	Is there a plan available for the project? If yes, ple
4	3	Planning & Scheduling	Project Plan	Is there a list of deliverables available for the proje
5	4	Planning & Scheduling	Project Plan	Is the plan updated to reflect the latest project st.
6	5	Planning & Scheduling	Project Plan	How fre
7	6	Planning & Scheduling	Project Plan	Who pr
8	7	Planning & Scheduling	Project Plan	Who up
9	8	Planning & Scheduling	Project Plan	When w
10	9	Planning & Scheduling	Project Plan	What information items from the Project Plan are
11	10	Planning & Scheduling	Project Plan	How frequently are the information items generat
12	11	Planning & Scheduling	Project Plan	Who generates the information items (PM / PMO
13	12	Planning & Scheduling	Dependencies Log	Where are the project dependencies maintained
14	13	Planning & Scheduling	Dependencies Log	What are the PMO responsibilities w.r.t. the Depe
15	14	Planning & Scheduling	Dependencies Log	Is the Dependency log updated periodically to re

Transition Checklist

# EPC – Onboarding Phase



## Objectives

### ☐ **EPC Awareness** (for PM)

- What are EPC Service Area Offerings
- What are EPC Central Services
- Introduction to EPC Tools



### ☐ **Project Understanding** (for EPC)

- Confirm Project Delivery Type ( Waterfall or Agile)
- Confirm EPC Service Area
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### ☐ **Agree on Next steps**

# Onboarding Outcomes – Summary

Asks From PM: Email Confirming EPC Project Size, Committing To Costs And Registration Date



- Point of Contact:**
- EPC Engagement lead <Name> will be the point of contact for all clarifications on EPC service related queries and also be the first point of Escalation contact
- ^Note:**
- EPC Billing for the project will commence from the agreed Registration date
  - EPC Portal – Engagement & Decision Tracker will be updated with below details as evidences for agreement/ approval with BP
  - If the project funds are revisited during the course of the project lifecycle. EPC Project size & service will change accordingly and the consequent billing changes will be applied from the month of change. EPC Engagement lead will reach to you to notify the change.

Populated table to be sent to PM for approval

#	Outcome	Completed (Yes/ No)	Comments^ [updated by Engagement lead based on inputs from PM]
1	Agreement on Services as per Project Delivery Type		✓ Waterfall / Agile
2	Agreement on Process Area(s) to be serviced		✓ Capture service area exemptions
3	Agreement on Dedicated and/ or Offsite service		✓ Capture Service Model ✓ Capture applicable EPC charges
	Approved EPC Project Size & Project Cost**		✓ Mention the source of Approved IT&S project fund** ✓ Capture EPC Project size
4	Establish if project undergoes Transition or is considered New		✓ Confirm if its an ongoing project or New
5	Agreement on Initiation/ Transition completion plan		✓ Dates for Initiation phase activities are agreed
6	Agreement on Registration Date/ Billing start date and Registration End Date		✓ Commencement of Initiation / Transition phase activity for any service area is marked as Registration date/ Billing start date ✓ Capture Registration End Date

\*\* IT&S approved Project funds including white spend but excluding hardware costs with the correct DoA (Business case, FM, email if very early stage)

# EPC – Onboarding Phase – Completed.



## Objectives

### ☐ **EPC Awareness** (for PM)

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### ☐ **Project Understanding** (for EPC)

- Confirm EPC Service Area
- Confirm Service Model, Establish Project Value and EPC Project Size
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### ☐ **Agree on Next steps**



# **APPENDIX**

# EPC Service Line Operations through Pictures



**Delivery Team  
in India:**

*The EPC analysts  
hold daily stand-ups  
collaborating on  
inputs from projects*



**Assurance Team  
in India:**

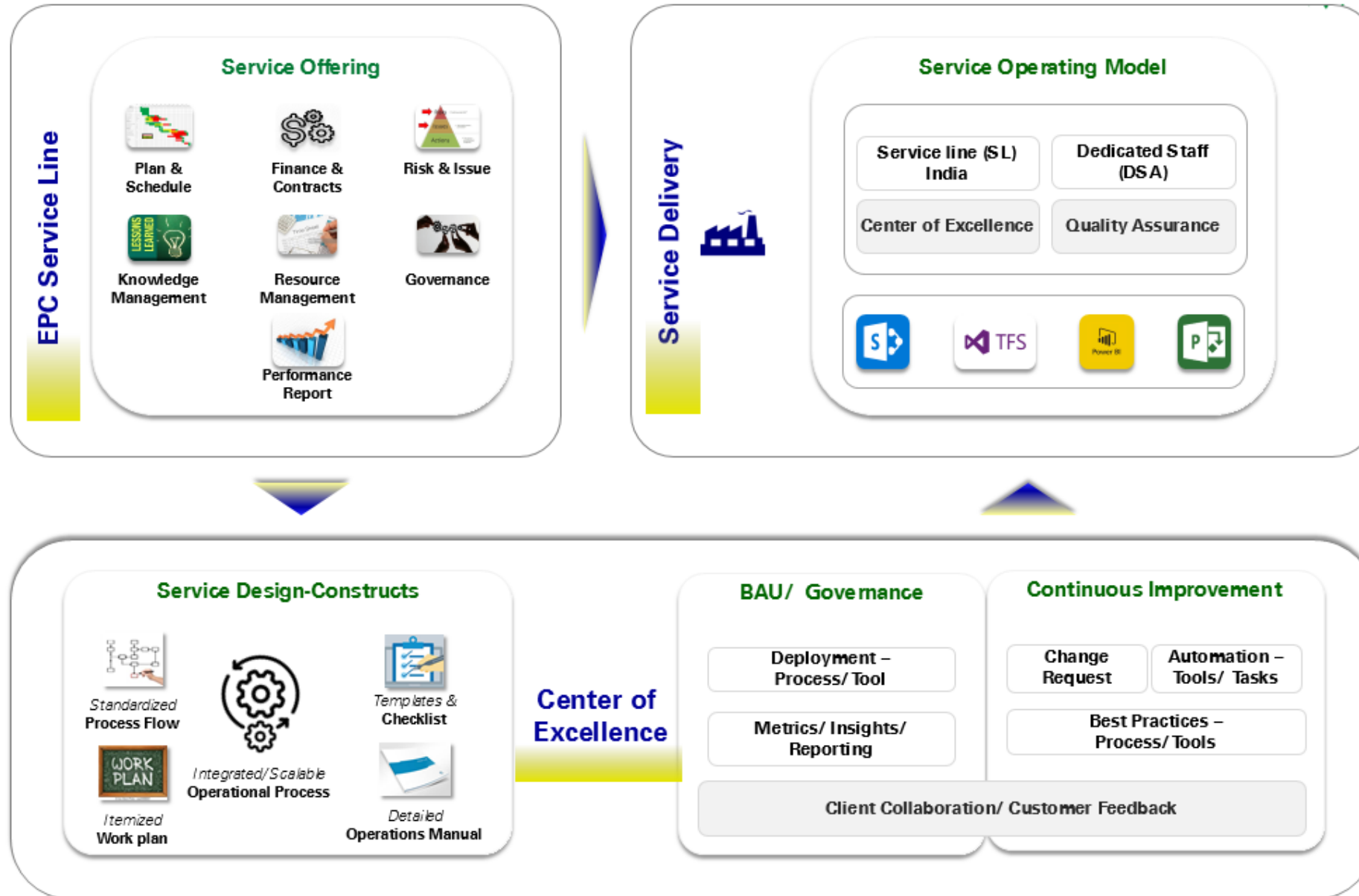
*The Assurance  
team holds daily  
stand-ups for  
assurance and  
gap reviews*

**EPC India Team with Sam Thomas**





# EPC (PMO) Service Line – Service Area Offering, Industrialized Service Delivery & CoE



## Contact Us



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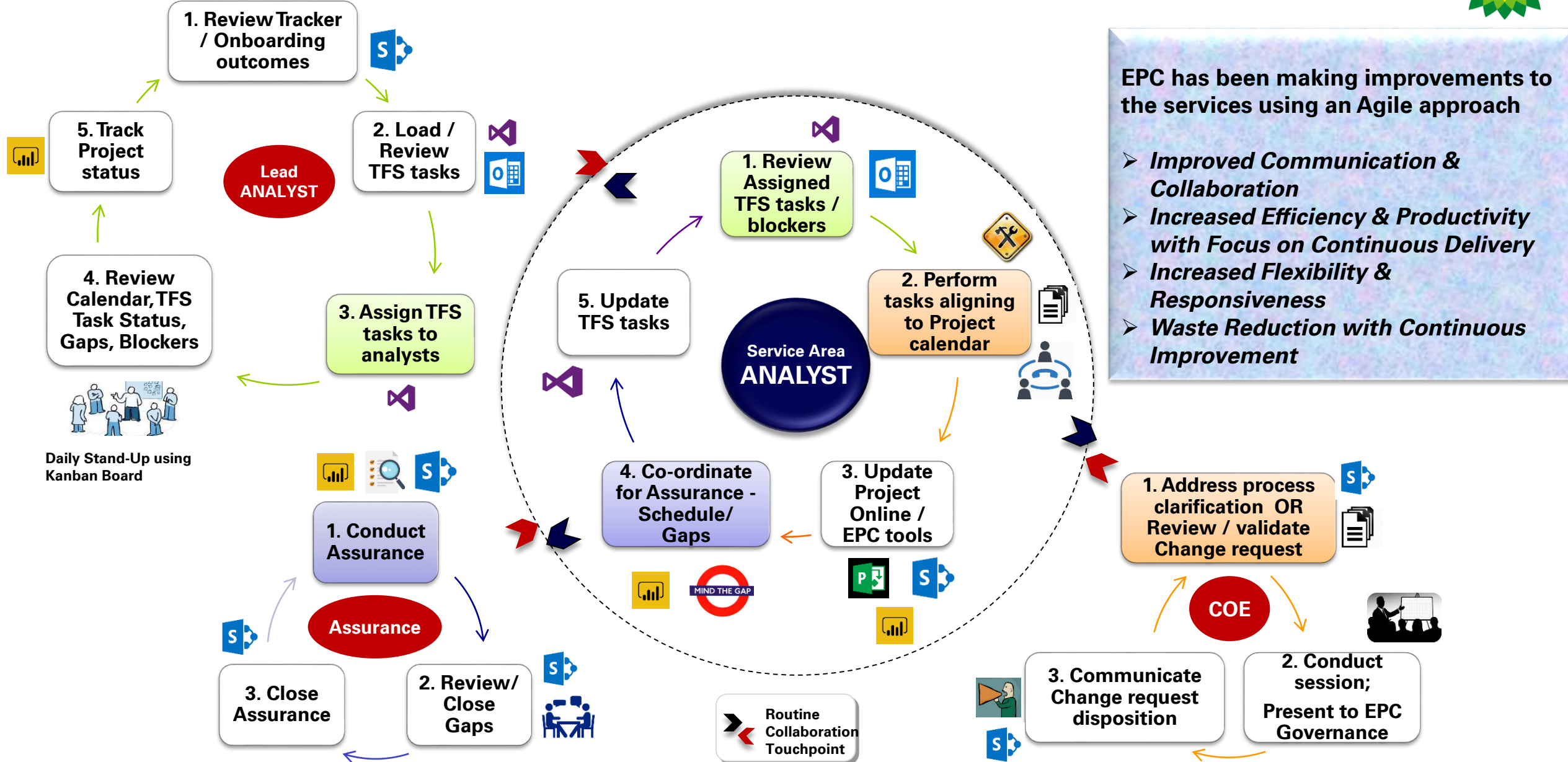
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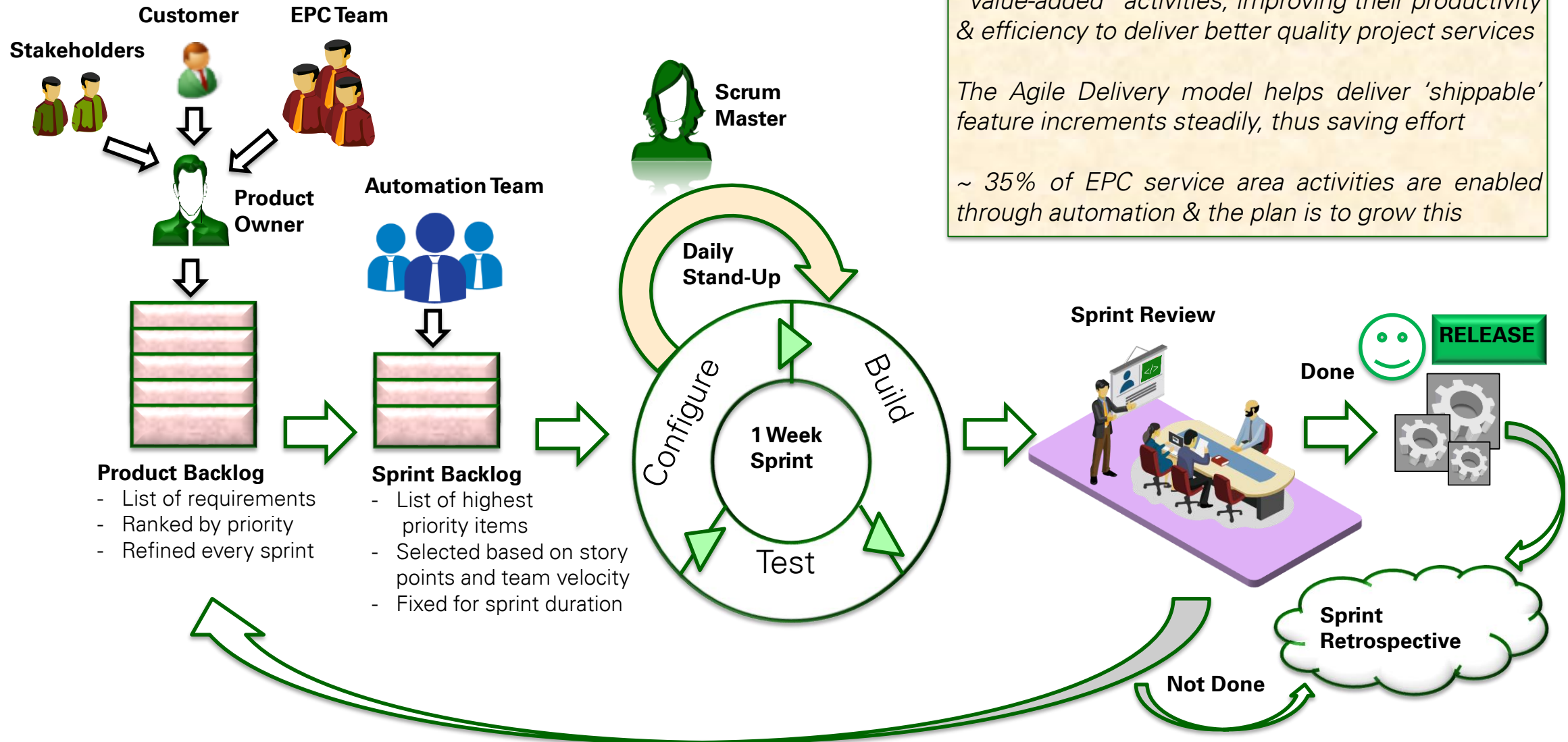


# EPC Service Cycle – Industrialized Service Delivery Delivered using Agile Approach





# EPC Automation - Agile Delivery Model



Automating the repeatable & routine activities of the EPC Analysts to free them up to focus on the more "value-added" activities, improving their productivity & efficiency to deliver better quality project services

The Agile Delivery model helps deliver 'shippable' feature increments steadily, thus saving effort

~ 35% of EPC service area activities are enabled through automation & the plan is to grow this

# EPC Assurance Activities - Planning, Reviews, Reporting, Maturity - using Agile Methodology



- Ensures that projects serviced by EPC follow the BP processes, tools and mandatory deliverables
- Uses checklists to conduct assurance, log gaps & track them to closure by working with EPC analysts
- Ensures that projects utilize BP Project Health Checks
- ~ 8% of assurance check-points automated with plan to increase to 46% this year

- EPC Project Delivery has matured with the help of Assurance process & EPC Projects have maintained a high level of data quality with a Data Integrity Score of 94.1%
- The quality of the project delivery has increased as the number of assurance gaps identified has reduced per project even though the number of projects using the service has increased



# EPC Awareness – EPC Offerings by Service Area

Services Offered, Frequency Of Activities & Distribution Of Responsibilities Between EPC & The PM – Explained



Tasks				Frequency Table				
#.	Services Offered Resource Management Activities	Responsibilities		Frequency of Activities			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM**	Small Projects	Intermediate Projects	Large Projects		
1	Execute the BP joiners, movers and leavers' processes.	Execute Process	Provide inputs regarding BP joiners, movers and leavers	Once - Initiation and then Monthly	Once - Initiation and then Monthly	Once - Initiation and then Monthly	• Project Online • EPC Portal	• Resource Register
2	Own and maintain the headcount information for each project - provide reports as required.	Conduct meeting with PM	Provide inputs	Monthly	Monthly	Monthly		
3	Own and maintain the resource database for all IT&S personnel within BP GPD/other planning tools.	Conduct meeting with PM	Provide inputs	Monthly	Monthly	Monthly		
4	Ensure time writing for all resources is complete within required timescales.	Validate time-entry for resources allocated to project	Help resolve any time-writing conflict for their resources	Quarterly	Quarterly	Quarterly		
5	Maintain resource management tools, processes, reporting and forecasting (scenario modelling - linked to financial modelling).	Initiate the Performance Management reporting sub-process	None	Monthly	Monthly	Monthly		

PM\*\* refers to PM / PM representative

# EPC Awareness – EPC Offerings by Service Area –

## Planning And Scheduling (Waterfall) – Activity Details – Explained



### Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM * *	Small Projects	Intermediate Projects	Large Projects		
1	Create WBS	Deliverable Creation	Content for deliverable	Once - Initiation	Once - Initiation	Once - Initiation	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	<ul style="list-style-type: none"> <li>• Work Breakdown Structure</li> <li>• Dependencies Log</li> <li>• Project Plan</li> </ul>
2	Create Dependencies Log	Deliverable Creation	Content for deliverable	Once - Initiation	Once - Initiation	Once - Initiation		
3	Create MSP Schedule	Deliverable Creation	Content for deliverable	Once - Initiation	Once - Initiation	Once - Initiation		
4	Baseline WBS, Project Plan	Perform action	Provide approval	Once - Initiation	Once - Initiation	Once - Initiation		
5	Maintain WBS	Update deliverable	Provide content	Monthly	Monthly	Monthly		
6	Maintain Dependencies	Update deliverable	Provide content	Monthly	Monthly	Monthly		
7	Maintain Project Plan	Update deliverable	Provide content	Monthly	Weekly	Weekly		
8	Re-Baseline Project Plan	Perform action	Complete pre-requisites (e.g. seek approval from Project Gatekeeper), Approve Re-Baseline	Monthly	Weekly	Weekly		
9	Schedule Risk Analysis	Update deliverable	Provide content	Monthly	Monthly	Monthly		
10	Close Project Plan	Update deliverable	Project Closure Approval	Once - Closure	Once - Closure	Once - Closure		

# EPC Awareness – EPC Offerings by Service Area –

## Planning And Scheduling (Agile) – Activity Details – Explained



S.No.	What EPC will do	Responsibilities		Frequency	Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PO **			
1	DevOps tools set up	DevOps Instance Creation, Migration of backlog, Workflow creation, Teams creation	Provide Project information	Once - Initiation	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> <li>• Azure DevOps ( for Agile Projects)</li> </ul>	<ul style="list-style-type: none"> <li>• Dependencies Tracker</li> <li>• Product Roadmap ( for Agile Projects)</li> <li>• Product Backlog</li> </ul>
2	Support in User story mapping and MVP as per business value	Capture User Personas, mapping of goals/epics to user personas etc, Use of SpecMap in Azure DevOps	Provide information about various user personas	Once - Initiation		
3	Support PO to create Product Road Map	Product roadmap guideline, creation of roadmap under plan section of DevOps tool	Provide details of milestones, sprints and expected timelines	Once - Initiation		
4	Schedule risk analysis of the Product Road Map	Highlight Dependencies and Risk to Product Roadmap	Provide content updates for Risk	Once - Initiation		
5	Create Initiatives/Goals/ epics/Product Backlog items in AzureDevops	User Story Guidelines, Product Backlog Setup Azure Devops	Provide information about Initiatives/ Goals/ PBIs	Once - Initiation		
6	Log project dependencies	Log Dependencies, Create Dependency Tracker	Provide information about Dependencies	Once - Initiation		
7	Capture deliverables needed to achieve the project goals (Includes BP Shall Deliverables)	Deliverable Register	Provide information about Deliverables	Once - Initiation		
8	Capacity Planning	Capacity Planning Report	Provide information about resource commitments and timelines	Once - Initiation; Monthly		
9	Set Up team project Board	Set up Kanban Board, Team board	Validate the Boards setup	Once - Initiation		
10	Product backlog management	Checks to ensure manageable size of Product Backlog	Provide information on priorities	Monthly		
11	Maintain - Product Roadmap, Dependency Log, Product Backlog, Team Boards	Make updates	Provide necessary information	Monthly		

# EPC Awareness – EPC Offerings by Service Area –

Risks & Issue(Waterfall) – Activity Details - Explained



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## Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM **	Small Projects	Intermediate Projects	Large Projects		
1	Conduct Risk meeting and identify New Risks and Issues	Drive meeting	Provide content	Once - Initiation	Once - Initiation	Once - Initiation	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	Risk and Issue Register
2	Update register with risk assessment	Create / update deliverable	Provide content	Once - Initiation	Once - Initiation	Once - Initiation		
3	Update register with Risk response details	Create / update deliverable	Provide content	Once - Initiation	Once - Initiation	Once - Initiation		
4	Submit R&I register for PM Approval	Seek approval from PM	Feedback (if any), Approval	Once - Initiation	Once - Initiation	Once - Initiation		
5	Block PM Calendar for recurring meetings based on EPC Governance	Send meeting invites to PM	Accept meeting invites	Once - Initiation	Once - Initiation	Once - Initiation		
6	Review R&I register in scheduled meeting	Drive meeting	Attend review meeting, provide content	Monthly	Monthly	Monthly		
7	Update new risks and issues in the register	Update deliverable	Provide content	Monthly	Monthly	Monthly		
8	Update register with existing risks, issues information	Update deliverable	Provide content	Monthly	Monthly	Monthly		
9	Update register with realized, closed risks, issues	Update deliverable	Provide content	Monthly	Monthly	Monthly		
10	Update register with closure comments & mark closed	Update deliverable	Provide content	Once - Closure	Once - Closure	Once - Closure		

# EPC Awareness – EPC Offerings by Service Area –

## Risks & Issue (Agile) – Activity Details - Explained



S.No.	What EPC will do	Responsibilities		Frequency	Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PO **			
1	RAID log creation (Project/Program Level)	Relevant Historical Risks, RAID Template in Azure DevOps, Capture Program level Risk in Risk Register and Project level Risk in Azure DevOps	Provide information on Risk and Issues	Once - Initiation	• Project Online / PM Zone • EPC Portal – Multiple Trackers • Azure DevOps	• Risk & Issue Register
2	RAID log maintenance (Project/Program Level)	Update Due Date, Impact, Mitigation Plan and Review Date of the Risks and Issues	Provide information on Risk and Issues	Bi-weekly		
3	Risk tagging the Backlog item in Dev Ops Tool	Update PBI's that are getting impacted by Risks and Issues	Provide information on Risk and Issues	Bi-weekly		
4	Project/programme R&I aggregated review - identification of trends and systemic risk	Provide a program level view to the PM	Provide information on Risk and Issues	Bi-weekly		
5	Attend Scrum-Of-Scrums – Monitor risks, issues and dependencies	Update R&I Log, Azure DevOps	Send meeting invite	Bi-weekly		

PO\*\* refers to PO / PO representative



# EPC Awareness – EPC Offerings by Service Area –

## Governance – Activity Details - Explained



### Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM <sup>**</sup>	Small Projects	Intermediate Projects	Large Projects		
1	Responsible for providing assurance services.	Conduct assurance activities	Provide deliverables and inputs for assurance	Quarterly	Monthly	Monthly	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	<ul style="list-style-type: none"> <li>• Project Health-checks</li> <li>• Project Calendar (governance framework)</li> </ul>
2	Coordinate and consolidate data for Stage Gate Meet/ IT&S Review/ Leadership Deep Dives, where applicable.	Conduct Health-check & notify PM on gaps	<ul style="list-style-type: none"> <li>• Attend meeting &amp; provide inputs for the health check tool</li> <li>• Fix gaps and provide updates, until the gap is closed</li> </ul>	Quarterly	Quarterly	Quarterly		
3	Ensure all projects follow BP policies and procedures.	Conduct Health check and log gaps in 'Gaps Tracker'	Fix gaps and provide updates, until the gap is closed	Monthly	Monthly	Monthly		
4	Support project deep dives as required.	Work with PM to re-visit EPC & Project deliverables, templates, tools & Governance framework	<ul style="list-style-type: none"> <li>• Confirm and fix gaps</li> <li>• Provide approval or feedback, until it can be approved</li> </ul>	Quarterly	Quarterly	Quarterly		
5	Ensure projects are closed inline with BP policies and procedures.	Conduct Health-check & notify PM on gaps	Fix gaps and provide updates, until the gap is closed	Quarterly	Quarterly	Quarterly		



# EPC Awareness – EPC Offerings by Service Area –

## Finance & Contracts – Activity Details – Explained – 1/ 2



### Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM **	Small Projects	Intermediate Projects	Large Projects		
1	Facilitate the creation and maintenance of the Economic Evaluation Model (EEM) for all projects and programmes.	EEM Template/Mini Model template - if a draft/approved version is already not available with PM	Provide content like Benefits, Business case	Once - Initiation and then Quarterly	Once - Initiation and then Quarterly	Once - Initiation and then Quarterly	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> <li>• Segment specific Finance tools</li> </ul>	<ul style="list-style-type: none"> <li>• Economic Evaluation Model (EEM) / Finance Tracker</li> <li>• Accruals</li> </ul>
2	Facilitate the creation, building and maintenance of financial plans at all levels.	Finance Tracker Template Updates in Project Online	Provide content like Project Spend, Spend categories, etc.	Once - Initiation and then Quarterly	Once - Initiation and then Monthly	Once - Initiation and then Monthly		
3	Prepare and submit quarterly financial data, consolidation, verification and reporting - Accruals, GCRT, GFO (Quarterly) analysis and reporting.	Accruals Template (segment specific)	Project spend changes/updates Confirmation on accrual numbers	Quarterly	Quarterly	Quarterly		
4	Reconciliation of accruals and actuals.	Actuals data received from BP SAP team (Transactional Cost Report - TCR, Cost Management Tool - CMT, Cost Management Database - CMD) Project Finance data from Project online	Validate and provide inputs in case of mismatch	Quarterly	Monthly	Monthly		
5	Monitor and record re-allocation of investment in year - project over/under-spend.	Project investment over spend/under spend updates via Finance tracker	Project investment over spend/under spend details	Quarterly	Quarterly	Quarterly		

# EPC Awareness – EPC Offerings by Service Area –

Finance & Contracts – Activity Details – Explained – 2/ 2



## Frequency Table \*\*When Required

S.No.	What EPC will do	Responsibilities		How often this will be done **			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM **	Small Projects	Intermediate Projects	Large Projects		
1	Submit Contract in iNeed	Update the Contract Template and submit the request to IP Team	Provide content	Once - Initiation and then Quarterly	Once - Initiation and then Quarterly	Once - Initiation and then Quarterly	<ul style="list-style-type: none"> <li>Project Online / PM Zone</li> <li>EPC Portal – Multiple Trackers</li> <li>Segment specific Finance tools</li> </ul>	<ul style="list-style-type: none"> <li>iNeed Request</li> <li>Confirmation Cost Code and UFA Code</li> </ul>
2	Request Cost Code and confirm the Cost Code to Finance Tag	Updating the Cost Code form and submit for generation	Provide content	Once - Initiation and then Quarterly	Once - Initiation and then Monthly	Once - Initiation and then Monthly		
3	Request UFA Code and confirm the UFA Code to Finance Tag	Updating the UFA Code form and submit for generation	Provide content	Quarterly	Quarterly	Quarterly		

# EPC Awareness – EPC Offerings by Service Area –

Knowledge Management – Activity Details – Explained



## Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM <sup>**</sup>	Small Projects	Intermediate Projects	Large Projects		
1	Confirm PM has SolMan Access for SAP Projects	Check with PM	Provide inputs	Once - Initiation	Once - Initiation	Once - Initiation	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	<ul style="list-style-type: none"> <li>• Project Workspace</li> <li>• Soln. Mgr. documents (SAP only)</li> <li>• Lessons Learned</li> </ul>
2	Validate Project Online set up (Repository Structure) and Access	Validate	None	Once - Initiation	Once - Initiation	Once - Initiation		
3	Block PM Calendar for recurring meetings based on EPC Governance	Schedule meetings with PM	Accept meeting invites	Once - Initiation	Once - Initiation	Once - Initiation		
4	Manage change to “Project Online” Access for Project Resources	Manage access	Resources list, access levels required	Monthly	Monthly	Monthly		
5	Conduct Deliverables Completion Health Check (PM Zone, SolMan)	Perform Healthcheck	Get deliverables uploaded on Project Site before health check	Quarterly	Quarterly	Quarterly		
6	Document/Update Lessons learned in Lessons Learned portal	Upload Lessons learned in Knowledge Exchange	Content Updates for Lessons Learned	Quarterly	Quarterly	Quarterly		
7	Perform KM Closure activities	All	Project Closure Approval	Quarterly	Quarterly	Quarterly		

# EPC Awareness – EPC Offerings by Service Area –

Performance Management (Waterfall) – Activity Details\* – Explained



## Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM **	Small Projects	Intermediate Projects	Large Projects		
1	Facilitate the creation and maintenance of all performance management reports.	Gather/extract data and create/maintain report	Provide input/commentary	Quarterly	Monthly	Monthly	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	COA Reports
2	Responsible for pro-actively gathering and consolidating Management Information (MI) at all levels: status, schedule, \$, resources, risk, issues, benefits and commentary.	Gather/extract data and create/maintain report	Provide input/commentary	Quarterly	Monthly	Monthly		
3	Responsible for providing and producing MI 'insights' - liaise with the delivery community to produce in depth commentary.	Gather/extract data and create/maintain report	Provide input/commentary	Quarterly	Monthly	Monthly		
4	Help prepare all levels for LT level reporting - e.g. IT&S Review, Quarterly Performance Report (QPR), direct reports, Boards etc.	Gather/extract data and create/maintain report	Provide input/commentary	Quarterly	Quarterly	Quarterly		
5	Responsible for the planning, tracking and reporting of build and configuration objects (e.g. Reports, Interfaces, Conversions, Enhancements, Forms (RICEF))	Check the project related build and configuration reports on PM Zone	Resolve any gaps (missing reports, missing data etc)	Weekly	Weekly	Weekly		
6	Responsible for the planning, tracking and reporting of all testing activities (string, integration, UAT, performance etc.)	Check the project related testing reports on PM Zone	Resolve any gaps (missing reports, missing data etc)	Weekly	Weekly	Weekly		
7	Responsible for the planning, tracking and reporting of all cutover activities.	Check the project related cutover activities' reports on PM Zone	Resolve any gaps (missing reports, missing data etc)	Weekly	Weekly	Weekly		
8	Create and maintain project metric reporting.	Gather/extract data and create/maintain report	Provide input/commentary	Quarterly	Monthly	Monthly		

\* Activities to be updated based on Project Report completion by Tools/ Reporting team – Work in progress

PM\*\* refers to PM / PM representative

# EPC Awareness – EPC Offerings by Service Area –

## Performance Management (Agile) – Activity Details\* – Explained



S.No.	What EPC will do	Responsibilities		Frequency	Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PO **			
1	Setup Agile Reporting (includes One time workshop to identify the Program & Team Level Metrics/KPIs aligned to Program Objective )	Setup Metrics and Dashboard	Provide inputs on metrics required	Once - Initiation	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> <li>• Azure DevOps</li> </ul>	<ul style="list-style-type: none"> <li>• Agile Metrics and Reports</li> </ul>
2	Providing and producing MI 'insights' - liaise with the delivery community to produce in depth commentary.	Trend Analysis and Insights on Reports	Provide inputs on metrics required	Bi-weekly		
3	Help prepare all levels for LT level reporting - e.g. IT&S Review, QPR, direct reports, Boards etc.	Support with the content for the reports with data for Schedule, Highlights, Key Milestones, Key Risks and Issues and Financial data	Provide inputs on metrics required	Bi-weekly		

# EPC Awareness – EPC Offerings by Service Area –

## Resource Management – Activity Details – Explained

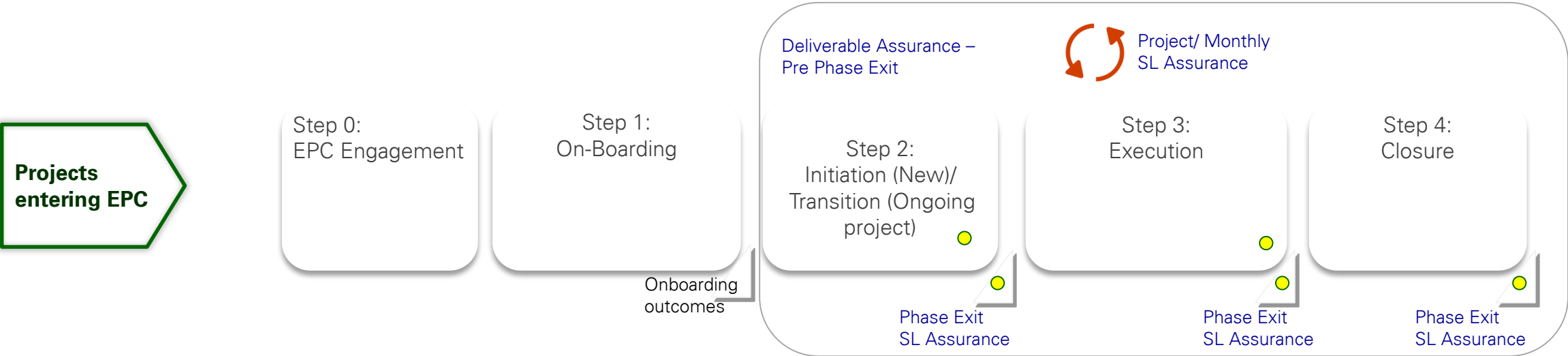


### Frequency Table

S.No.	What EPC will do	Responsibilities		How often this will be done			Tools used by EPC	EPC Deliverables
		EPC Contribution	Expectations from PM **	Small Projects	Intermediate Projects	Large Projects		
1	Execute the BP joiners, movers and leavers' processes.	Execute Process	Provide inputs regarding BP joiners, movers and leavers	Once - Initiation and then Monthly	Once - Initiation and then Monthly	Once - Initiation and then Monthly	<ul style="list-style-type: none"> <li>• Project Online / PM Zone</li> <li>• EPC Portal – Multiple Trackers</li> </ul>	Resource Register
2	Own and maintain the headcount information for each project - provide reports as required.	Conduct meeting with PM	Provide inputs	Monthly	Monthly	Monthly		
3	Own and maintain the resource database for all IT&S personnel within BP GPD/other planning tools.	Conduct meeting with PM	Provide inputs	Monthly	Monthly	Monthly		
4	Ensure time writing for all resources is complete within required timescales.	Validate time-entry for resources allocated to project	Help resolve any time-writing conflict for their resources	Quarterly	Quarterly	Quarterly		
5	Maintain resource management tools, processes, reporting and forecasting (scenario modelling - linked to financial modelling).	Initiate the Performance Management reporting sub-process	None	Monthly	Monthly	Monthly		

# EPC Awareness – EPC Central Services

Delivery / Assurance Process Cadence – EPC Portal > [Assurance](#) - Explained



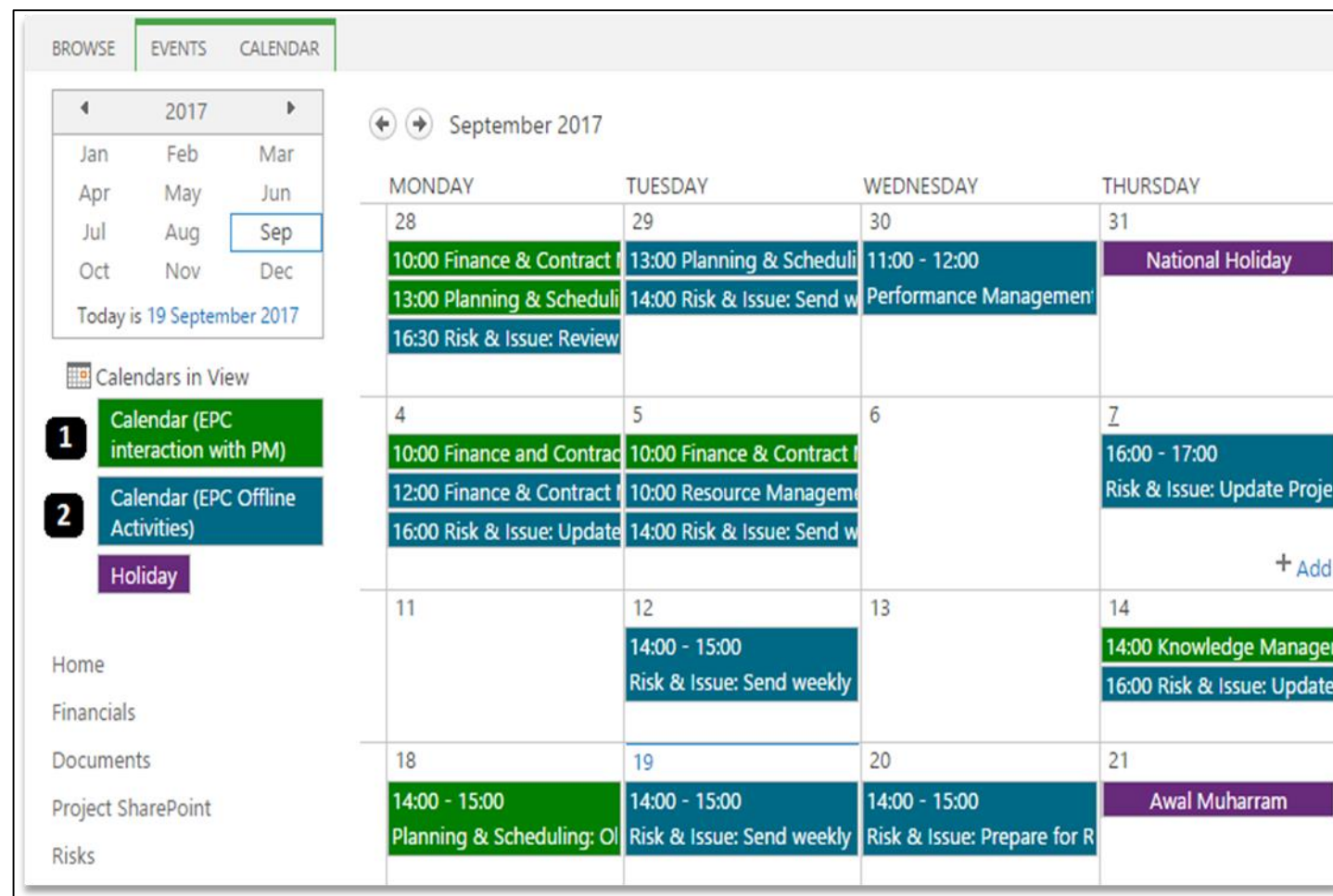
- Assurance Checklist, Stage gate checklist, IT&S Reviews
- Assurance checks performed by Service line Assurance team

# EPC Awareness – EPC Tools

## Project Online – Project Calendar View - Explained



- EPC will seek PM's (or PM representative) availability and block his Calendar for recurring, scheduled meetings on each service area, availed by the Project
- These will be recorded in Project Online through the "Project Calendar" feature
- Once configured, the Project Calendar will provide a one-stop view of all the meetings scheduled between EPC and the Project Team, in the next one to three months
- Based on the Project Calendar, these meetings will be scheduled in Outlook, to block the PM's (or PM representative) time formally



1 Refers to the schedule of interaction planned with PM

2 Refers to the schedule of offline activities performed by EPC analysts for the project



# EPC Indicative Pricing

Reference slide from Engagement pack



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**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 2019
- 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

**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

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

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

**Note: \*\* IT&S approved Project Funds include white spend but excluding hardware costs with the correct DoA**

Rates are updated each financial year\*  
See Appendix for definition of Approved IT&S Project Funds  
Refer [EPC FAQ Section](#) for details on billing cycle

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IT&S



# 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



# Version History – 1/ 2



#	Version Description	Creation Date	Author(s)	Approved on	Approver(s)
1	Initial version	20-Mar-2017	Suhasini A	31-Mar-2017	Ronan O'Brien
2	Updated content on Transition sessions	22-May-2017	Suhasini A		EPC COE
3	Added content on EPC Metrics	24-May-2017	Suhasini A		EPC COE
4	Updated content on EPC Metrics (New CI# 54 / Old CI # 45)	15-June-2017	Suhasini A		EPC COE
5	Updated Budget Utilization Ratio Formula on EPC Metrics (New CI# 54 / Old CI # 45)	28-June-2017	Sonali Dutta		EPC COE
V CI 127_158	Updates related to : <ul style="list-style-type: none"> <li>- Registration date decision made by BP LT (meeting on 11-Aug-2017)</li> <li>- CI# 127, CI# 158</li> <li>- Sam's input for Improvements &amp; final review comments</li> <li>- Include rate info Slide34 (Action#426)</li> <li>- Including the White spend related final confirmation received from Sam on 20-Oct-2017</li> </ul>	03-Oct-2017	Ganesh Michael Hadwin Nirav Gandhi	10-Oct-2017 16-Oct-2017 (Action #426) 20-Oct-2017 (Action #407)	Sam Thomas
V CI 127_158.1	Few format edits	02-Nov-2017	Ganesh S		Ganesh S
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-17	Nirav G/ Arun A Ganesh S	11-Dec-17	Jill S

# Version History – 2/ 2



#	Version Description	Creation Date	Author(s)	Approved on	Approver(s)
V CI 279	Update EPC project size calculation definition for large project (Slide #16, #35)	29-Jan-18	Ganesh S	29-Jan-18	-
V CI 303	<ul style="list-style-type: none"> <li>Update onboarding pack to incorporate "Route map" related changes rolled out by BP</li> <li>Changes related to Implementation of resource register in POL (CI 288)</li> </ul>	20-Feb-2018	Ganesh S	-	-
V CI 306	<ul style="list-style-type: none"> <li>Update onboarding pack to incorporate an impact note due to change in project cost during the course of EPC service cycle</li> </ul>	26-Feb-2018	Ganesh S	-	-
V CI 358	<ul style="list-style-type: none"> <li>Update Onboarding Pack to replace FAR with IT&amp;S Review</li> </ul>	24-Apr-2018	Sonali Dutta	24-Apr-2018	Sam Thomas
V CI 362	<ul style="list-style-type: none"> <li>Added slides on EPC Posters - EPC Service Line Operations through Pictures, EPC (PMO) Service Line and Service Delivery using Agile Approach, EPC Automation - Agile Delivery Model and EPC Assurance Activities - Planning, Reviews, Reporting, Maturity - using Agile Methodology</li> </ul>	3-May-2018	Sonali Dutta	3-May-2018	Sam Thomas
V CI 378	<ul style="list-style-type: none"> <li>Updated the EPC Awareness – EPC Offerings By Service Area slide to add “this is a summary of the overall tasks” and remove EPC from the line “defined frequency based on EPC project size”</li> </ul>	24-May-2018	Sonali Dutta	24-May-2018	Sam Thomas
V CI 395	<ul style="list-style-type: none"> <li>Updated the “EPC Awareness – EPC Tools – 2/ 3 (EPC Portal)” slide to mention about the Project and Assurance Dashboards tab in EPC Portal</li> </ul>	9-Jul-2018	Sonali Dutta	9-Jul-2018	Sam Thomas
V CI 410	<ul style="list-style-type: none"> <li>Updated the Org Chart for Engagement Manager of Americas</li> </ul>	30-Jul-2018	Ranjan Sham	30-Jul-2018	-
V CI 421	<ul style="list-style-type: none"> <li>Update the Onboarding pack with links to FAQ in the EPC Billing details page</li> </ul>	27-Sep-2018	Ranjan Sham	27-Jul-2018	-
V CI 429	<ul style="list-style-type: none"> <li>. Updated for 2019 rate card</li> </ul>	19-Dec-2018	Ranjan Sham	19-Dec-2018	-
V CI 433	<ul style="list-style-type: none"> <li>Updated for revised rate card based on mail from Andrew price</li> </ul>	22-Jan-2019	Sathya	22-Jan-2019	
V CI 428	<ul style="list-style-type: none"> <li>Updated for Agile services</li> </ul>	15-May-2019	Ranjan	15-May-2019	
CI 460	<ul style="list-style-type: none"> <li>Updated revised prices for year 2020</li> </ul>	26-Nov-2019	Purva	26-11-2019	