Implementation Overview

February 1, 2018
Implementation Stages

Pre-implementation
- Identify the Team
- Establish Project Governance & Cadence
- Agree on Roles and Responsibilities
- Determine Project Milestones
- Create and secure sign-off on implementation plan
- Discovery meeting preparation
- Complete Information Request
- Contracting

Discovery
- User interviews
- Identify manual processes & current painpoints
- Perform gap analysis
- Begin drafting requirements workbooks
- Establish requirements sign-off procedures

Design, Configure & Build
- Segment all development in to 4 phases
- Complete requirements workbooks and secure sign-off
- Configure and perform data conversion
- Configure, function test then demonstrate each phase to the City upon completion

System and Acceptance Testing
- Integration testing
- Parallel payroll testing
- User acceptance testing
- Data conversion sign-off
- Create user documentation
- Perform user training

Transition to Ongoing Support
- Wrap-up training for all stakeholders
- Confirm completion of all participant and staff communications
- Finalize administration manual/procedures
- Finalize call-center training
- Confirm readiness for all system users, operations staff and call center staff
- Finalize procedures and communications on the transition and blackout period for conversion
- Confirm production systems readiness
Morneau Shepell Team

Pierre Chamberland
Executive Sponsor

Kevin Kanoon
Client Relationship Lead

Bruce Borgos
Transition Lead

Brad Fusco
Operations Lead

Penny Campbell
Call Center Lead

Terri Arceneaux
Program Manager

Business Requirements

Implementation Manager

Data Manager

Project Manager

Implementation Team
System Configuration, Data Managers, Web Development and QA
Implementation Governance

**STRATEGIC STEERING COMMITTEE**

- **Membership**
  - City Executive Sponsor
  - Morneau Shepell Executive Sponsor
  - City leadership
  - Morneau Shepell leadership

- **Objectives**
  - Strategic direction
  - Implementation trajectory
  - Operational performance
  - Risk management
  - Financials & billing

- **Establishes correct course and speed for project completion**

**OPERATIONAL PROJECT TEAM**

- **Membership**
  - City project lead
  - Morneau Shepell program and relationship managers
  - Key delivery managers – benefits, HR, IT and payroll
  - Other partners as required (Mercer, Insurance Vendors, etc)

- **Objectives**
  - Current activities
  - Project status
  - Issues and change management

- **Maintains responsibility for project completion**
# Implementation Governance & Cadence

<table>
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<tr>
<th>Meeting</th>
<th>Frequency</th>
<th>Attendees</th>
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</table>
| **Executive Steering Committee**          | monthly     | **Chair:** City Project Manager, co-**Chair:** Morneau Shepell Program Manager  
**Members:** Executive representatives from all parties |
| **Project Management**                    | bi-weekly   | **Chair:** Program Manager  
**Members:** Program Manager, Project Managers, Business Requirements Lead, Transition Lead, Implementation Manager |
| **Project Team meetings**                 | weekly      | **Chair:** Project Managers  
**Members:** Delivery Leads |
| **Joint Labor Management Benefit Committee** | Monthly     | Confirm attendees |

The Executive Steering Committee meets monthly, with the Chair being the City Project Manager and the co-Chair being the Morneau Shepell Program Manager. The Members include executive representatives from all parties. The Project Management Committee meets bi-weekly, with the Chair being the Program Manager. The Members include Program Manager, Project Managers, Business Requirements Lead, Transition Lead, and Implementation Manager. The Project Team meetings are weekly, with the Chair being the Project Managers. The Joint Labor Management Benefit Committee meets monthly, with the attendees to be confirmed.
# Roles & Responsibilities

<table>
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<th>Role</th>
<th>Description</th>
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| Executive Sponsors with Relationship Leads         | • Executive engagement and support for the Program including ultimate decision authority on schedule, scope, budget  
• Change Management and Readiness Champions        |
| Program Manager with Project Manager              | • Coordination of all phases, schedule planning, risk management, resource planning, governance meetings, issue escalation and resolution project documentation |
| Transition Lead with Communications Lead, Operations Lead | • Change management strategy planning  
• Transition management satisfaction measurement  
• Review of outsourcing outputs, tools and user experience across all channels  
• Coordination of User Acceptance Training  
• Change Management and Readiness Champions        |
| Business Requirements Lead with Solution Architects and SMEs | • Coordination of discovery and requirements workshops  
• Responsible for overall solution design  
• Change Management Champions                      |
| Call Center Lead                                  | • Responsible for all aspects of call center setup and readiness                                                                                 |
## Roles & Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Data Manager with Delivery Managers and SMEs (HR, IT, Payroll)</th>
<th>Implementation Manager</th>
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</table>
|      | • Coordinate with other partners (Mercer, Insurance Vendors) on Data and Interface requirements, data needs, data conversion and carrier export schedules  
• Leads design, development, testing of all data exchanges including HRIS, Payroll, and Carrier Exports  
• Responsible for identifying and pushing resolution for any gaps in data requirements and/or exchanges  
• Change Management and Readiness Champions | • Participate in workshops ensuring accuracy of provisions, process management, data administration & maintenance, third party interactions, reports, and reconciliations  
• Act as liaison between the City’s delivery teams and the project team  
• Policy and administration process decision making (HR, IT, Payroll)  
• Change Management and Readiness Champions |

|      | • Leads design, development, testing of all benefit provisions, administration tools, user experience, reports and communications  
• Responsible for identifying and pushing resolution for any gaps in requirements and/or process | • Participate in workshops ensuring accuracy of benefit provisions, process management, reports, and communications  
• Act as liaison between the City’s delivery teams and the project team  
• Policy and administration process decision making (Benefits)  
• Change Management and Readiness Champions |
# Delivery Schedule

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<th>Phase</th>
<th>Q1 2018</th>
<th>Q2 2018</th>
<th>Q3 2018</th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
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2019 Annual Enrollment Window
Next Steps

- Complete **Pre-Implementation** Stage
  1. Complete Information Request
  2. Compile full roster of project team members, roles, responsibilities
  3. Compile timing constraints, schedules
  4. Continue the contracting process

- Begin Planning for **Discovery** Stage
  1. Complete implementation plan
  2. Schedule user interviews
  3. Schedule recurring project meetings