

Phases of a Commercial-Off-The-Shelf (COTS) Project

1. Determine the project objectives, scope and elicit requirements

- a. Examine the problem and/or opportunity
- b. Decide on measurable success criteria
- c. Identify scope
- d. Identify stakeholders

2. Evaluate and select a package

- a. Prepare requirements and Request For Proposal (RFP)
- b. Create an objective evaluation process
- c. Review available solutions
- d. Evaluate against requirements and success criteria
- e. Assess the vendor
- f. Select the best package

3. Assess the package for fit

- a. No package will meet every need exactly
- b. Assess gaps
 - i. Compare “as is” situations with potential “to be” occurrences
 - ii. Compare business needs to application solution features
 - iii. Develop conversion requirements for software implementation
 - iv. Develop interface requirements for manual or software interfaces
 - v. Perform gap analysis of:
 1. Terminology
 2. Data
 3. Process
 4. Business Rules
 5. Workflow
 6. Usability
 7. Access Security
 8. Interface
- c. Decide if customization will be done
- d. Develop customization requirements

4. Oversee and validate customizations

- a. This is frequently a sub-project within the larger “COTS” project
- b. Who will build custom code?
- c. Who will administer application usage?
- d. Who will develop procedures?
- e. How will the customization be maintained?

5. Develop and execute the implementation plan

- a. Data conversion
- b. Interface coding
- c. Customization testing
- d. Stakeholder/user training
- e. Rollout schedule

6. Post implementation assessment

- a. User satisfaction
- b. User effectiveness, efficiency, and productivity
- c. IT support costs
- d. Vendor support level and costs

7. On-going support and maintenance

- a. Vendor upgrades
- b. User change/enhancement requests
- c. New interfaces
- d. Retirement

Source: B. Carkenord; 5 BA Musts for a COTS Project, WI BADD™ 2010 Symposium Track, <http://www.wibadd.org>