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## Appendix 2: Project Management Plan, Quality Assurance Plan, and Staffing Plan for Information Technology Transformation Detailed Planning Follow- on Strategic Deep-Dives at the Department of the Interior

McKinsey & Company, Inc. Washington D.C.

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In response to Request for Quotations (RFQ) No. D12PS00053

Under McKinsey GSA MOBIS Schedule GS-10F-0118S

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*This proposal is contingent on the Parties reaching mutually agreeable terms and conditions and upon acceptance of any limitations described herein.*

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## 1. PROJECT MANAGEMENT PLAN

Our approach is focused on delivering impact for DOI. Our approach ensures that our conclusions are:

- **Feasible and practical.** We spend time throughout understanding and analyzing the context, constraints and capabilities (e.g., budget situation, personnel skills), and consider these when devising recommendations. Extensive involvement of our senior leadership assures a highly pragmatic lens is applied to our recommendations before they are finalized.
- **Able to deliver substantial impact.** Our 80-year history as one of the leading strategy consulting firms allows us to bring a strategic, impact-oriented approach to recommendations. We will not make recommendations that are technically interesting but fail to help DOI deliver its mission.

### Scheduling of tasks, meetings and deliverables

This effort has six specific deliverables.. We propose an overall timeline of 16 weeks to complete the effort outlined in the RFQ. We have provided more detailed timeline for each workstreams and deliverables in the attached project plan. The table below shows deliverables and completion dates:

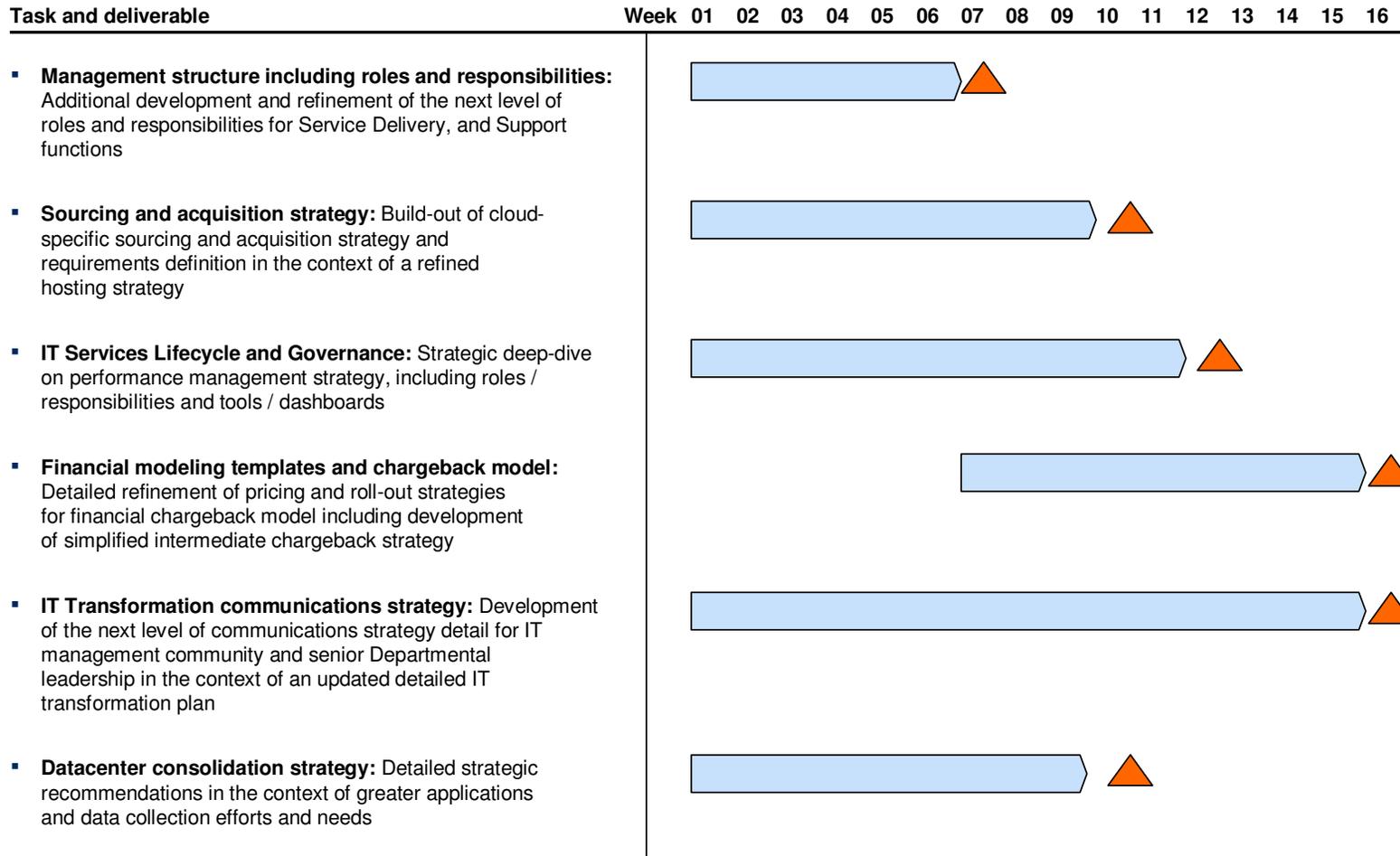
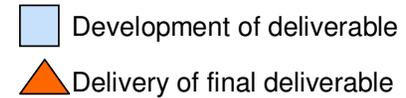
Table 1: Project deliverable timelines

SN	Task	Due week*
<b>Task 1.1</b>	Management structure including roles and responsibilities: Additional development and refinement of the next level of roles and responsibilities for Service Delivery, and Support functions	7
<b>1.2</b>	Sourcing and acquisition strategy: Build-out of cloud-specific sourcing and acquisition strategy and requirements definition in the context of a refined hosting strategy	11
<b>1.3</b>	IT Services Lifecycle and Governance: Strategic deep-dive on performance management strategy, including roles / responsibilities and tools / dashboards	12
<b>1.4</b>	Financial modeling templates and chargeback model: Refinement of pricing and roll-out strategies for financial chargeback model including development of simplified intermediate chargeback strategy	16
<b>1.5</b>	IT Transformation communications strategy: Development of the next level of communications	16

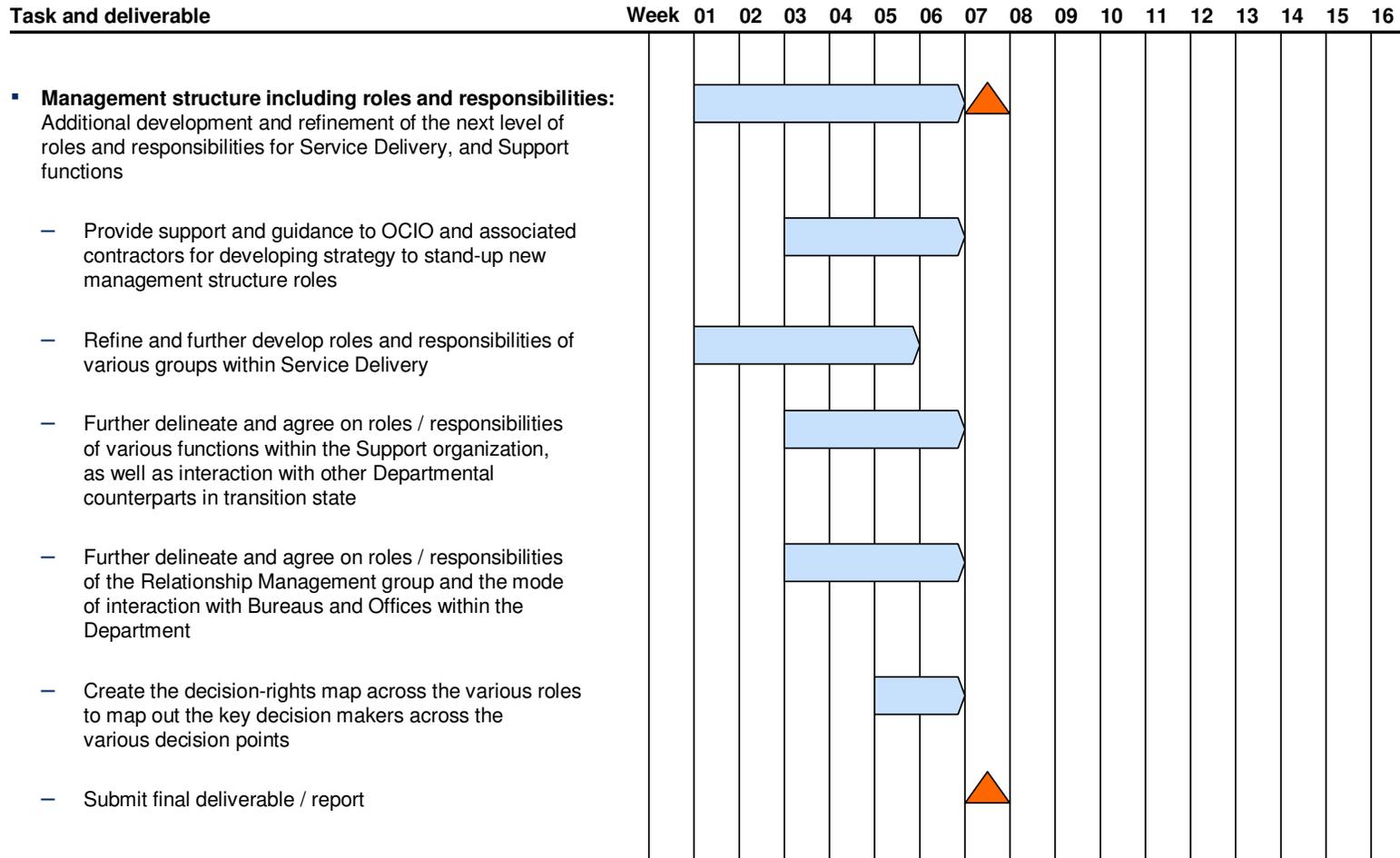
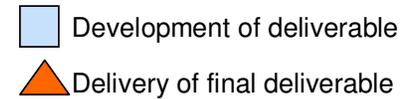
	strategy detail for IT management community and senior Departmental leadership in the context of an updated detailed IT Transformation plan	
<b>1.6</b>	Data center consolidation strategy: Detailed strategic recommendations in the context of greater applications and data collection efforts and needs	11

\* Indicates weeks after the launch of the full team

# DOI IT Transformation – Project plan

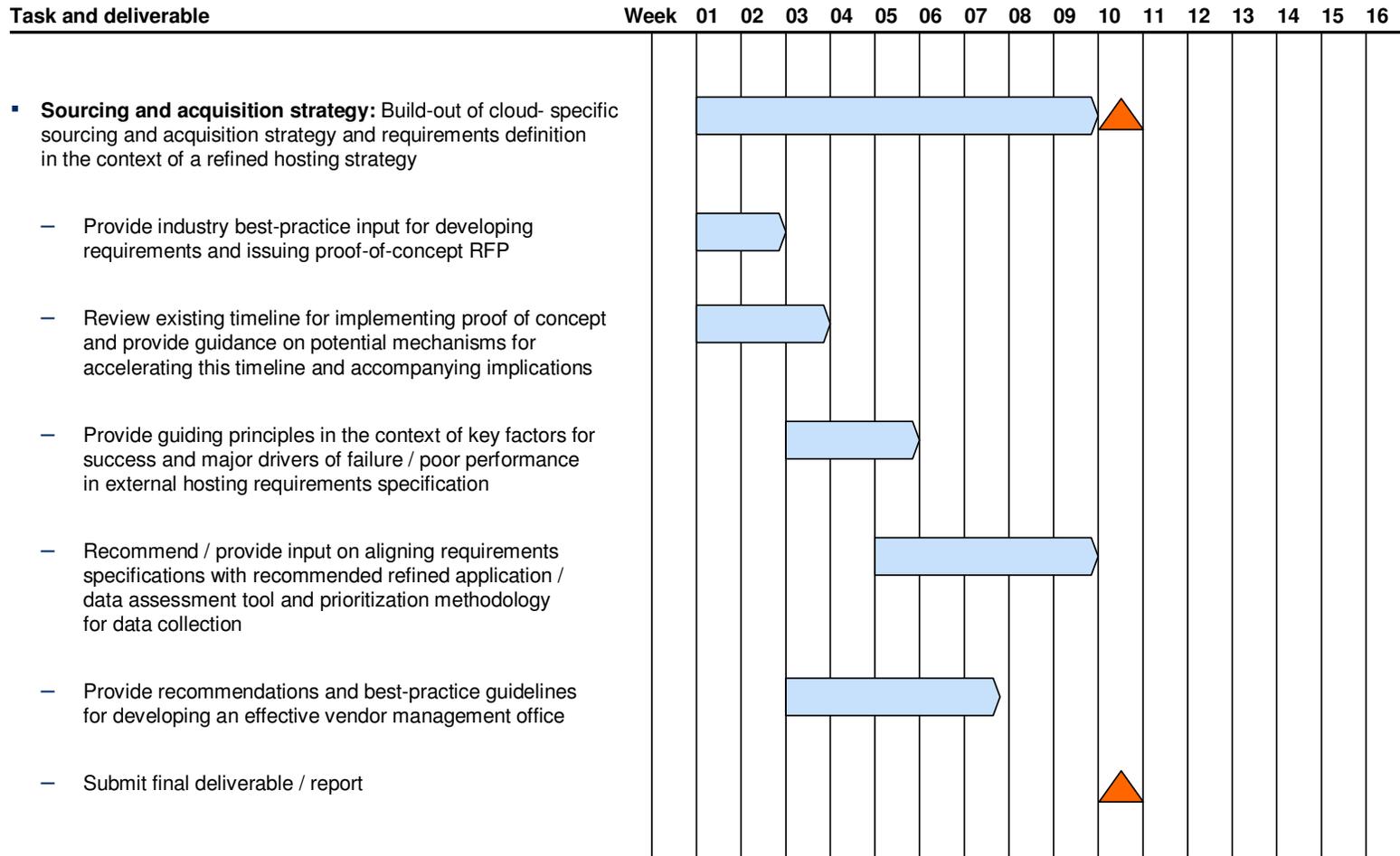


# DOI IT Transformation – Detailed Project Plan (1/6)



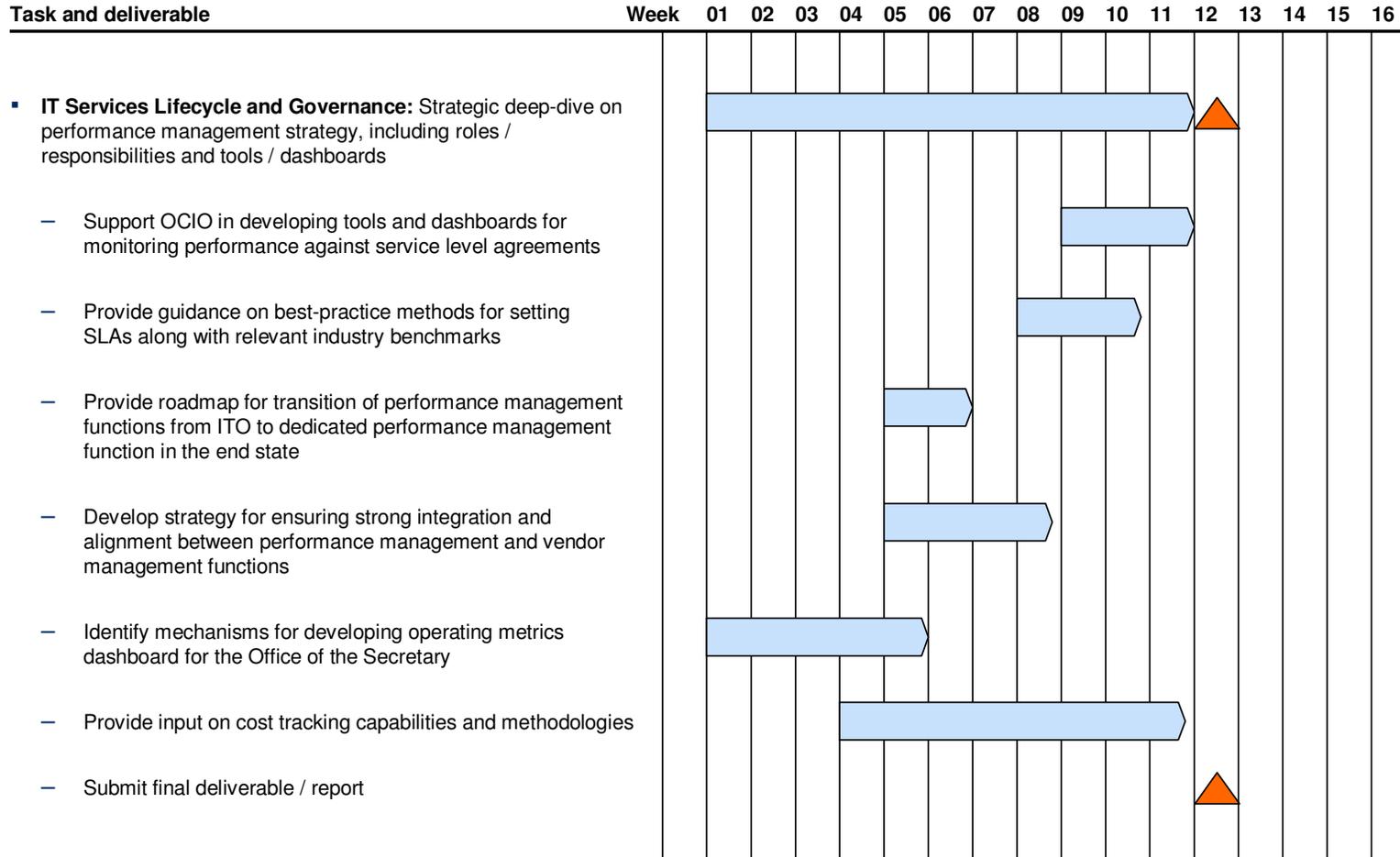
# DOI IT Transformation – Detailed Project Plan (2/6)

■ Development of deliverable  
▲ Delivery of final deliverable



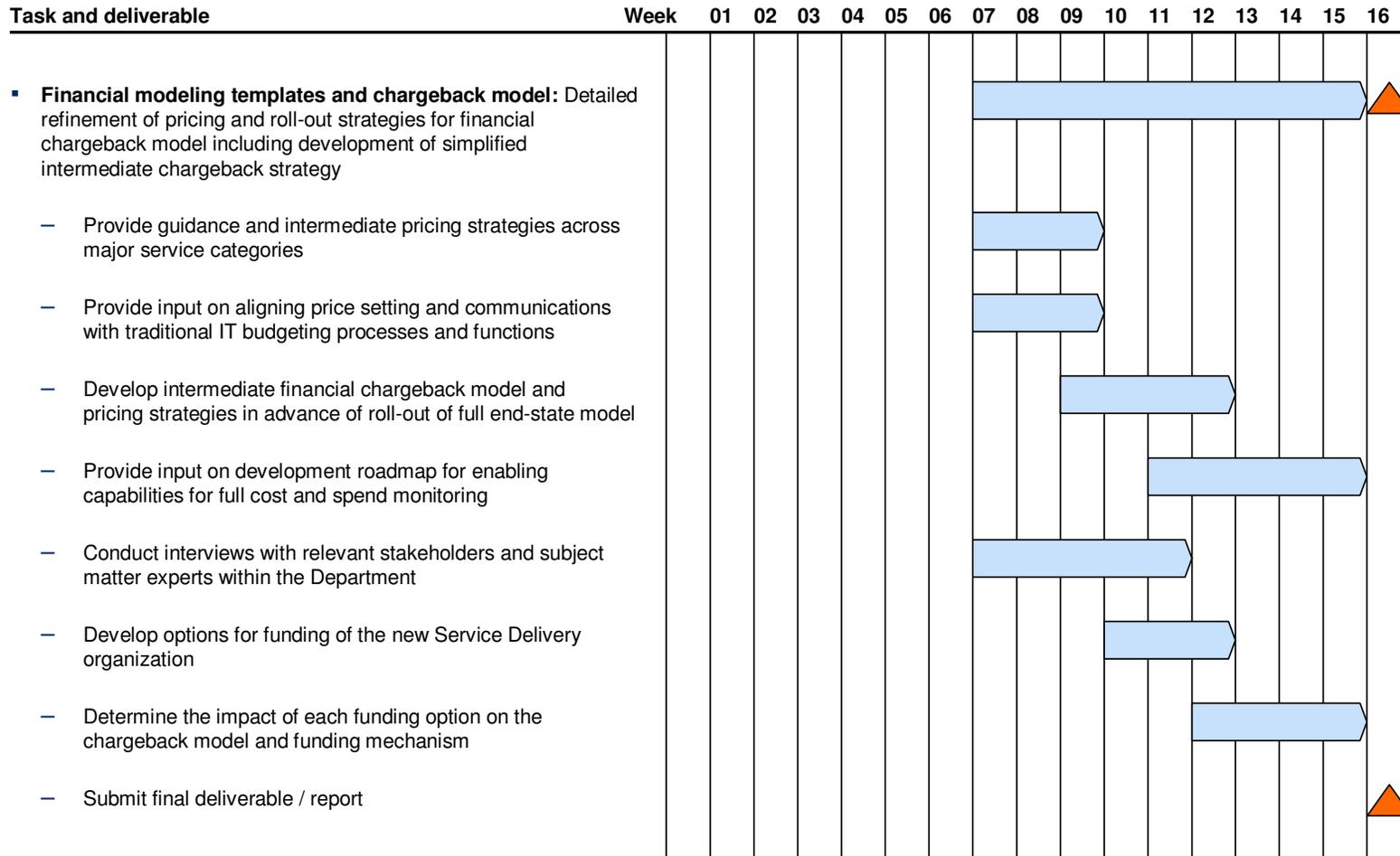
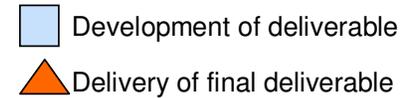
# DOI IT Transformation – Detailed Project Plan (3/6)

■ Development of deliverable  
▲ Delivery of final deliverable

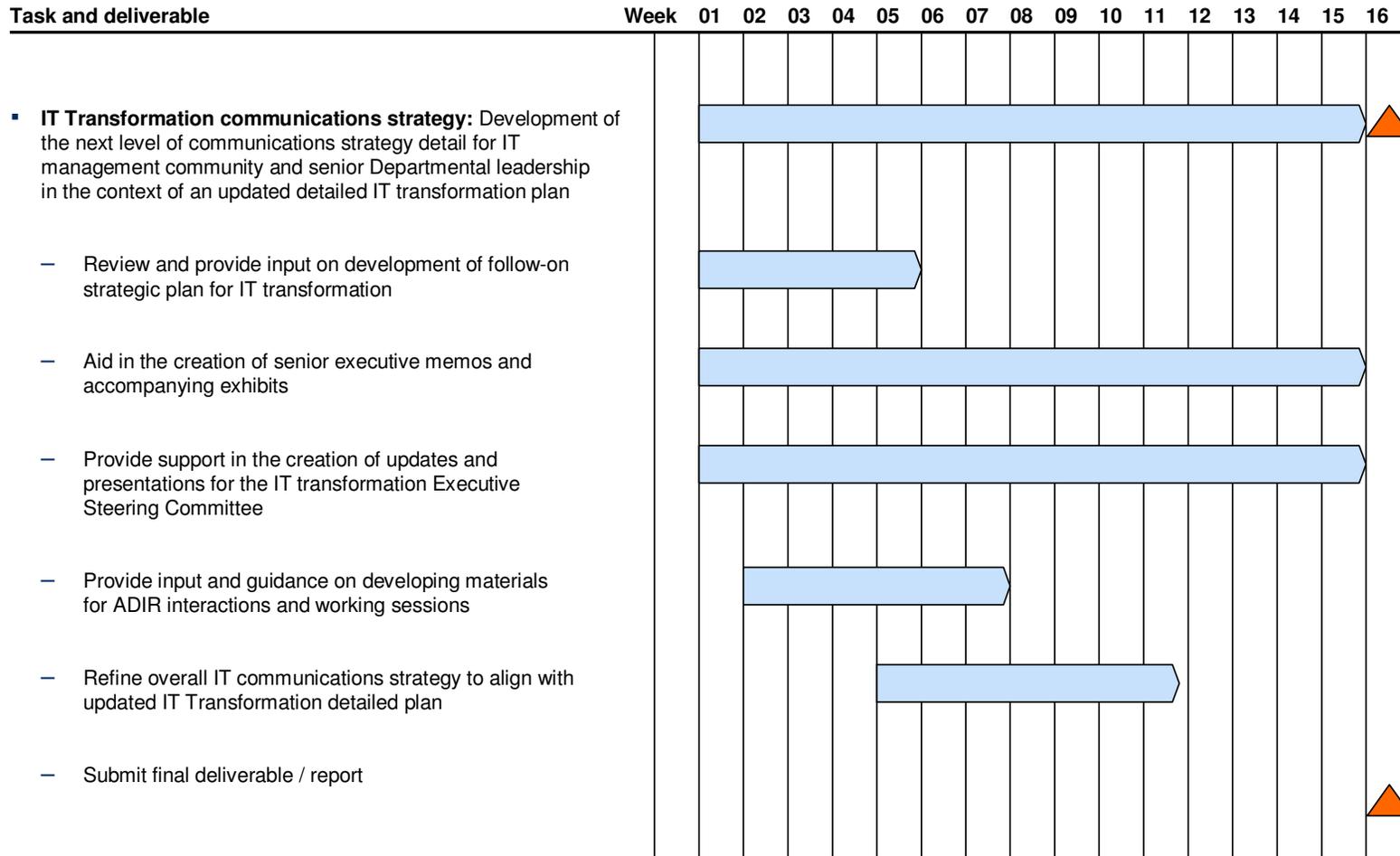
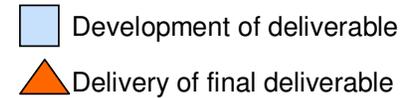


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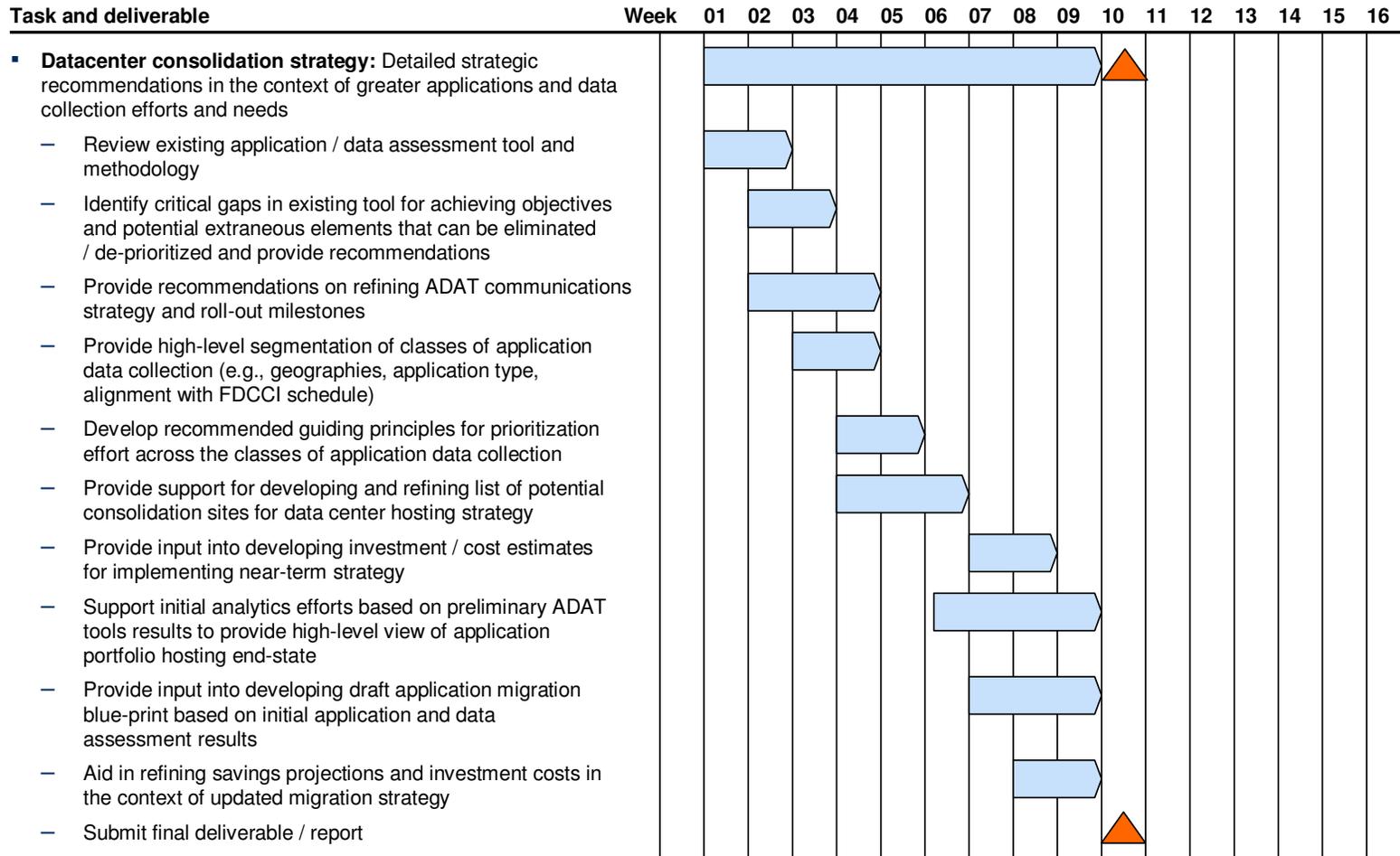
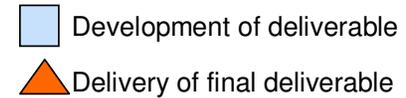
# DOI IT Transformation – Detailed Project Plan (4/6)



# DOI IT Transformation – Detailed Project Plan (5/6)



# DOI IT Transformation – Detailed Project Plan (6/6)



## 2. COMMUNICATION AND COORDINATION MECHANISMS

Our team will communicate regularly and clearly with DOI. We plan to use the following communication methods on this project:

- **Bi-weekly meetings.** Bi-weekly status updates to share findings, pressure-test emerging hypotheses, and agree on the way forward along with any additional meetings the leadership feels necessary.
- **Deliverables.** In addition to sharing findings and recommendations verbally, we would provide paper and electronic copies of all the deliverables specified in the RFQ. We will provide early drafts of deliverables before they are due so that DOI team members can provide input.
- **Proactive communications.** One of the McKinsey partners would engage at least weekly with key Department leaders to review project progress and identify any issues.
- **Leadership meetings.** Our leadership meets regularly with the working teams to share information and guide the teams' thinking and approaches
- **Daily working team meetings.** All members of the team would meet daily to ensure alignment, and that all information is being effectively shared across the various part of the engagement that are occurring simultaneously

Regularly scheduled meetings are one of the key ways we stay on track. We identify issues early on, and develop a plan to address them (including reallocating resources or increasing the use of our experts). The project manager and core leadership continue to monitor any issue until it is resolved.

### 3. STAFFING PLAN

The team configuration for this effort would consist of a working team of four full-time consultants, a project manager, core leadership team and an expert panel including dedicated IT Transformation experts.

- **Core leadership and key personnel.** A team of McKinsey partners and leaders with extensive relevant experience would review all work, ensure high quality output, and bring relevant expertise to the project. The leadership team will be deeply involved in the content of the work, including participating in all key meetings. Our core leadership team includes Jon Wilkins, Steve Kelly, Andrew Sellgren, and Ankur Ghia, who have been part of the core leadership team supporting the Department's efforts over the past six months. Ankur Ghia will also serve as the Project Manager for this entire effort.

**Working team.** Our working team is carefully designed to meet the unique requirements of each task and each team member would bring expertise germane to the specific needs of the project. As working team lead, Pedja Arandjelovic would remain a full-time team member and would provide on-the-ground process management. They will support the development of end-products and maintain an integrated view across all workstreams to manage interdependencies.

Three additional consultants would be full-time working team members and would be dedicated to specific workstreams and activities that are detailed in the project plan. Arsalan Tavakoli-Shiraji and James Piechota would remain full-time team members, and would focus on the infrastructure hosting aspects of the work including sourcing and acquisitions strategy, the datacenter consolidation strategy, and the financial chargeback model. The other team member would focus on performance management, communications, and management structure. We will select the final team member based on the project's start date, and matching the best qualified consultants at that time. We have provided a representative resume (in Appendix 3 - Key Personnel) to illustrate the type of working team member we would staff to this project.

The DOI team, in addition to the McKinsey team, will also be included as part of the broader working team. Their role will be critical in helping complete the requisite activities and navigate the organization. We have also found that having close collaboration with the client team allows for a seamless transfer of knowledge and eases the transition to the implementation phase of the IT Transformation effort.

- **Expert panel.** McKinsey experts would provide specific expertise based on their experience on related topics. These topics include IT shared services, service portfolio and catalogue, chargeback models, change management, IT governance, organizational transformation, and IT infrastructure (data center, cloud computing, support desk). We have specifically selected a panel

of experts, who collectively have been involved in scores of IT transformation in both public and private sector. Jinsook Han, Will Forrest, James Kaplan, Chandru Krishnamurthy, and Anupam Mishra, and Garrett Ulosevich would share time with the team on an ongoing basis.

The following table shows the areas of expertise of the core leadership, experts and the representative working team, which would be extensively used in this assessment. We can also draw upon our experience from across the globe and across public sector for a range of topics.

**Table 3: Mix of expertise across the proposed staff**

	Public Sector/DOI	IT Service Management	Change Management in Public Sector	IT Service Portfolio	IT Governance	IT Organization	IT Infrastructure
<b>Core leadership</b>							
<b>Ankur Ghia</b>	✓			✓	✓		✓
<b>Steve Kelly</b>	✓	✓				✓	
<b>Andrew Sellgren</b>	✓		✓		✓		
<b>Jon Wilkins</b>	✓		✓				
<b>Experts</b>							
<b>Jinsook Han</b>			✓		✓	✓	
<b>Will Forrest</b>		✓				✓	✓
<b>James Kaplan</b>		✓	✓				✓
<b>Chandru Krishnamurthy</b>			✓	✓	✓		✓
<b>Anupam Mishra</b>	✓			✓			✓
<b>Garrett Ulosevich</b>	✓		✓				
<b>Working Team</b>							
<b>Pedja Arandjelovic</b>	✓	✓	✓		✓	✓	
<b>Arsalan Tavakoli-Shiraji</b>	✓		✓	✓			✓
<b>James Piechota</b>	✓	✓		✓			✓
<b>Rishi Roy</b>	✓	✓			✓	✓	

## 4. QUALITY ASSURANCE PLAN

Consistent with our business philosophy, we have developed an approach to managing our engagements with the government that promotes high-quality deliverables and minimizes the risks to the government.

McKinsey's quality control methods have six elements, which we would include in our work for the DOI to provide high-quality products and services.

- **Heavy leadership involvement in our teams.** A hallmark of our consulting approach is the intense involvement of our partners on our engagement teams. Our partner to consultant ratio is 1:6, in contrast with the industry norm of 1:20 or even much higher. As a result, our partners can – and do – take responsibility for individually reviewing the quality of all the deliverables we produce on an engagement. Our partners have deep experience and expertise in the engagements they lead, which gives them the ability to structure the problem solving optimally, spot anomalies in any results, and help the team understand how various solutions would likely work in practice.
- **Close collaboration with our clients – in project design and during project execution.** We work hand-in-hand with our clients. Our consulting model requires substantial interactions between our clients and our personnel. In most cases, we work with our clients day-to-day, in their offices, in addition to having more senior-level progress reviews. At the outset of projects, we invest considerable time working with our clients on the design of projects to ensure that they are designed to achieve the client's objectives. Throughout each project, we maintain a high level of collaboration to ensure that we remain focused on our client's actual situation and constraints. As a result, we do not experience the problem of developing a “solution,” only to find that it does not match our client's circumstances.
- **Underpinning methodologies, including a fact-based problem solving approach.** Our work is underpinned by methodologies grounded in thousands of engagements performed with leading organizations around the world. Having our team members use these repeatable, established methods helps ensure high-quality products and services for our clients. One critical aspect of how we work is our fact-based approach to solving our clients' problems. We immerse ourselves in our clients' data, so that we identify the actual root causes behind problems and solutions based on information, rather than opinion. We are not constrained by what our clients have done in the past or by our own “off the shelf” methodologies. By grounding our work in the facts and by being methodical in our analysis of those facts, we can ensure that our clients have an informed basis for making decisions.
- **Project management.** We build quality control into our regular project management, e.g., through team meetings, leadership meetings, and progress reviews with clients. The leadership meets with teams at least twice weekly to share information, guide problem-solving, challenge progress and hypotheses, identify and resolve potential issues, and ensure that all activities are impact-focused. Also, one of the McKinsey partners meets at least weekly with our client executive to review project progress.

- **Regular performance reviews, with flexibility to change course.** We have established processes for reviewing the quality of our client service and the performance of individual consultants. We apply these processes to ensure the continuous improvement of our work for all of our clients worldwide. In our reviews, we also learn about changes in the demands of the project or by changes in the legal, political and budgetary environments, so that we can – as appropriate – make any mid-course adjustments and changes to the work plan. The ability to respond to new information also helps us ensure that our deliverables reflect our clients’ current needs. We recognize some pieces would require some different analyses than we expect at the start and we are prepared to adjust accordingly.
- **Staffing.** We staff teams to provide the greatest impact in each client situation. Core personnel and leadership who have deep IT Transformation knowledge and extensive experience working with the Department and/or other federal government agencies. Working team members would be skilled in multiple areas needed for this engagement. More details on our staffing approach are provided above in the Staffing Plan section.

Although the primary way in which we control for quality is through prevention, we also recognize that, despite our best efforts, there is a possibility that a problem could arise during the course of our work. We would **identify** any deficiencies in our work for the government by reviewing our work products in detail with our clients. As mentioned above, we hold regular progress reviews with our clients to update them about our findings and recommendations; we also discuss methodologies, findings, other research used (e.g., best practices), and the rationale for our recommendations. Our clients can question or challenge our findings and recommendations and, if they find deficiencies in the work, we take immediate action to correct those deficiencies.

To **correct** any deficiencies in the quality of our work, we would work with the client to understand what had caused the deficiency (e.g., a problem in the data set, a mistake in the analysis). We would then redo that portion of the work, have a thorough internal review with our leadership team, and, once we were satisfied, review the revised work with the client.

Because we perform our work on a firm fixed price basis, we are required to fulfill the objectives of the project to meet our contractual requirements and to justify billing the government. To the extent that we need to correct any deficiencies in our work, we assume responsibility for doing so, regardless of the additional time or resources required to make this correction. As discussed in our price proposal, by engaging us, the government reduces its own risks associated with this effort, since we assume any risks for deficiencies in our own work.