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# **Happy American Wireless Svcs. Inc**

## Program Charter

Electronic Bill Presentment and Payment

(eBPP)

eBusiness/IT Programs

**Revision 0.6, 03/09/01**

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## i. Revision History and Approvals

### *Document Revision History*

Date	Version	Description of Revision	Changed By
2/23/01	0.1	Initial Draft	John Boss
	0.2	Initial Team Review	John Boss
	0.3	Updated Team Roster	John Boss
2/23/01	0.4	Content: Overview, Assumptions Started	Mark Colborn
3/2/01	0.5	Template Formatting, Content Development	John Boss, Mark Colborn
3/9/01	0.6	Content Development	John Boss, Mark Colborn

### *Approvals*

Role	Name – (Signature)	Date Approved
IT eBIT Program Director	Scott Poobah	
IT 3G Program Manager	Donnie Otherdept	
Executive Sponsor		
eBPP Program Manager	John T. Boss	
eBPP Business Analyst		

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## 1. Executive Summary

**Program Name:** eBPP (Electronic Billing, Presentation and Payment) Program

**Program Goal:** Develop, integrate and implement a “best of breed” eBPP system, capturing all related elements of “the ultimate customer experience”, focusing especially on personalization of the presentation and the simplicity of the invoice statement.

**Program Type:** New Development

**Systems Impacted:** All 3G Customer Facing and Account Systems, including but not limited to CRM, Portal, ATG, and BIGBILLER.

## 2. Background

Happy American Wireless (HAW) is in the initial stages of establishing a new competitive business platform that will support 3G wireless customers. A key component of this platform is an electronic bill presentment and payment solution (eBPP) that will support products and services delivered via our third-generation (3G) wireless IP network. The emergence of 3G wireless technologies will cause a shift to a new billing paradigm created to support 3G products and services.

eBPP, in particular, is designed to reduce customer service costs, improve customer acquisition and reduce churn. Our customers can perform many functions that used to require the support of a company representative. While reducing the volume of service center calls and customer representative hours, the user also experiences an enhanced degree of autonomy. Today’s savvy “demand generation” users are beginning to measure modern businesses by the quantity and quality of online services available. Convenience is key. Also, online account information is a highly “sticky” service, since it is personal, dynamic and financially significant. Each user has the opportunity to personalize the presentation of his or her information, an investment of time and energy, which – if the service meets their needs – will bias the customer to stay where they have a customized account, perhaps even replacing their at-home accounting of these services.

eBPP is the “e-glue” that sticks all “customer systems” together, whether care, billing, payment, service monitoring and all things in the future. It is designed to retain our customers in a recurring online dialogue, giving them access to account information, including billing and statement data, invoices, notices, policies, trade confirms and profile information. The range and flexibility in services supported by 3G technology subscribers requires a personalized billing solution, with the key consideration for the subscriber being the simplicity of the invoice statement.

Subscribers will be encouraged to use self-service kiosks and On-line Customer Service (OCS) to view and pay their bills which may include charges "Billed on Behalf of" (BOBO) others like Amazon.com or Barnes and Noble. New mobile and data device designs provide subscribers the capability to access their bill and make payments to their account through their mobile phones and PDA's. HAW will want to provide this capability through its wireless network to all customers with capable devices. Lastly, elements of the bill presentment, specifically in the area of usage, and other daily activity will need to be presented electronically in real-time (within 5 seconds).

The emergence of 3G technology has caused the entire wireless industry to reevaluate how it will provide service and interface with subscribers. It is expected that eBPP will become over time, the preferred means that subscribers will review their account activities, set spending limits, resolve charging disputes, etc. Self service capability has the potential to reduce churn significantly and lower the costs associated with call center centric customer care facilities.

This functionality should be investigated as to its impact on 2G customers and extended where appropriate to similarly reduce customer care costs and churn across all customer segments. This investigation is not part of the scope of this eBPP charter but may be worthy of consideration as a smaller adjunct project.

### **3. Program Scope**

#### **Process Design Summary**

The new 3G billing process will integrate the new BillMakerInc BigBiller billing system that will aggregate, rate and summarize the customer bill for the various new charging scenarios enabled with 3G connectivity. The aggregated bill will be sent to DOC1 for formatting and then to OTS for printing. The formatted data will also be sent to the new eBPP system solution that will allow customers to view an interactive on-line bill with variable sorting and aggregation options. The new e-bill will also include new elements such as eWallet, BOBO transactions and eventually, 3G IP Data and Voice-over-IP transactions. The new bill will also be multi-lingual for use around the world and have optional provisions for special needs. Every attempt should be made in the development of eBPP processes to make subscriber presentment and payment simple, fast, and with lower than expected error rates.

#### **Program Description**

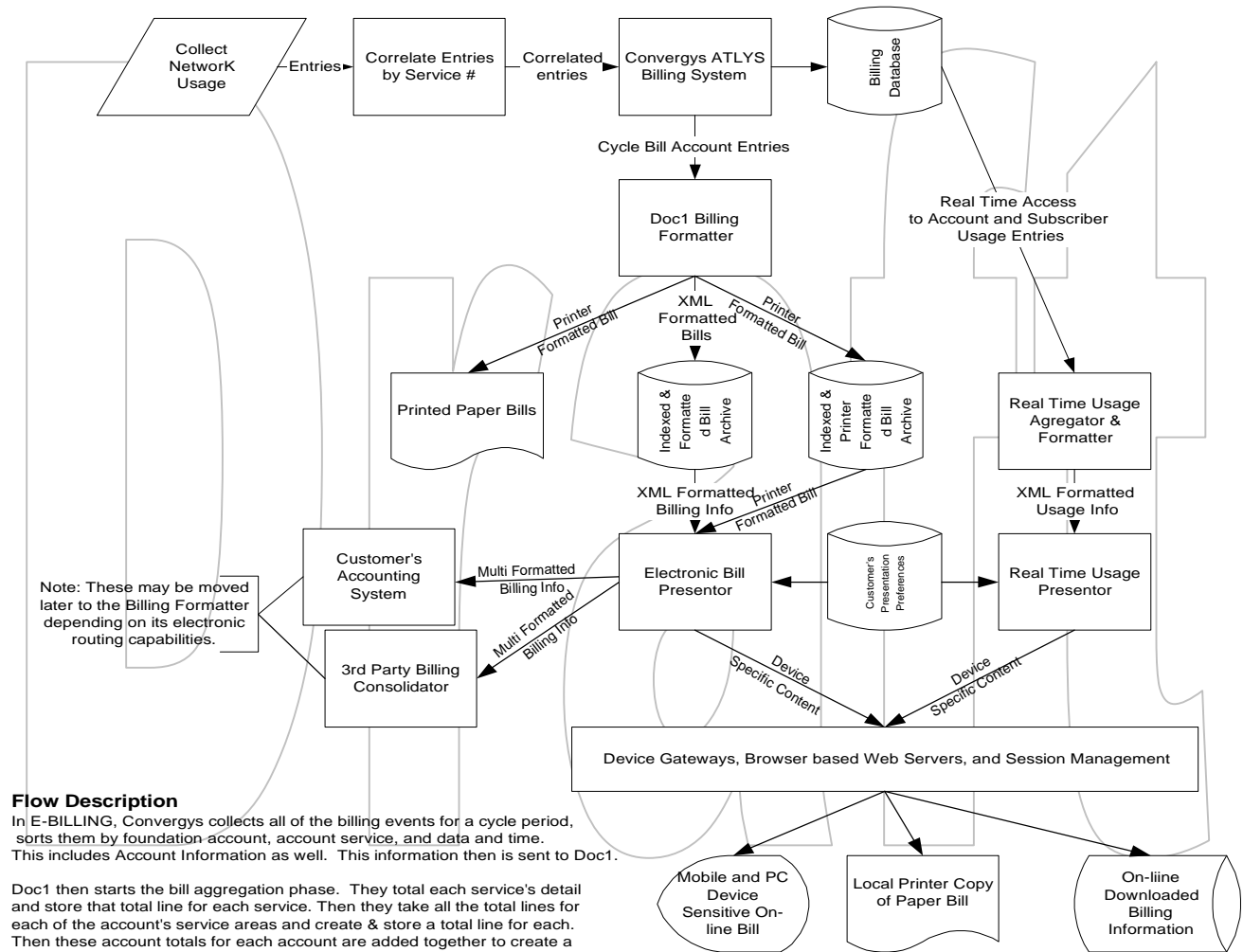
##### **HAW Electronic Bill Presentment & Payment Overview and Situation**

Third Generation (3G) wireless technology is an evolutionary step for HAW that will be a network change from circuit switching to digital packet switching for both voice and data. The General Packet Radio Service (GPRS) network air interface will eventually carry both voice and high-speed data over Internet Protocol (IP). When GPRS is fully deployed, simulcast services such as video conferencing will be possible and HAW will be positioned to offer global wireless network access.

Following are two diagrams showing at a high level, 1) architecture and process for eBPP data flow, and, 2) Electronic Payment Logical Data Flow.

Electronic Billing and Usage Presentment Data Flow

Electronic Billing and Usage Presentment Data Flow



Flow Description

In E-BILLING, Convergys collects all of the billing events for a cycle period, sorts them by foundation account, account service, and data and time. This includes Account Information as well. This information then is sent to Doc1.

Doc1 then starts the bill aggregation phase. They total each service's detail and store that total line for each service. Then they take all the total lines for each of the account's service areas and create & store a total line for each. Then these account totals for each account are added together to create a current monthly charge for that account and it is also stored. For foundation accounts, they then total all the current monthly charges for each account, that belongs to each Foundation Account, together and store this total as the Current Monthly Charge for the Foundation Account.

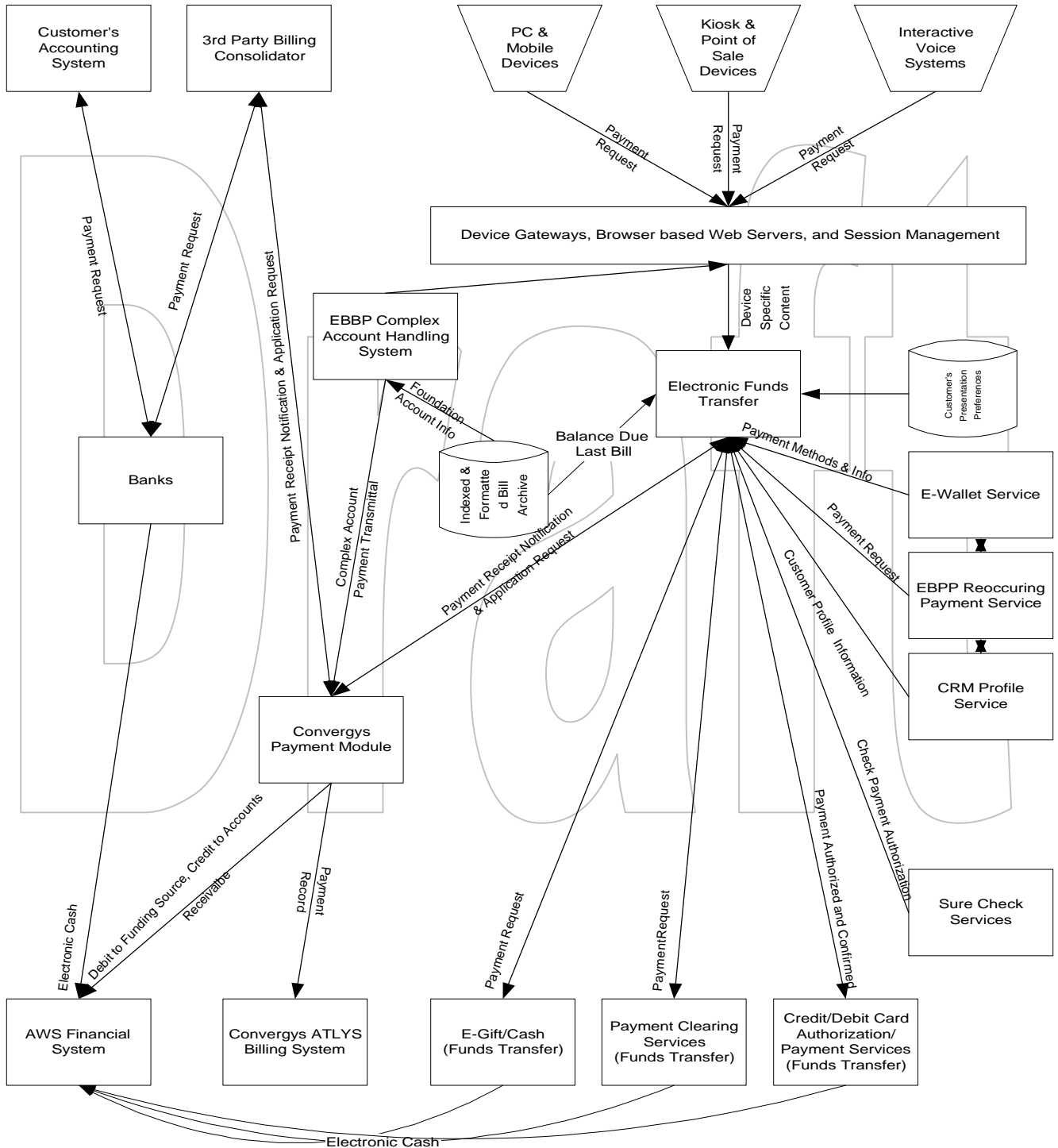
Doc1 then starts the bill formatting phase. Doc1 retrieves all the total and detail line entries using a specified format template to create a bill image for all accounts that can be printed, stored for reference, and mailed. They also create a XML formatted file of the total and detail line information for all accounts which can then be used by a on-line e-bill presentation application to retrieve an individual account's billing information.

In REAL-TIME, we are not waiting for Convergys and Doc1 to do their job. We are demanding that we get as much of the results that we would expect from Doc1 for a single customer's account NOW. We are not willing to wait for the cycle end date.

On an account by account basis, of retrieving the information that Convergys has to-date, aggregating that account's activity, formatting that accounts activity for presentation, and then presenting that account activity in a pleasant and understandable way for our customer.

Payment Diagram

Electronic Payment Logical Data Flow (Abridged)



## Program Roll-Out Strategy

The PMO will schedule tasks and deliverables using the following phased approach.

- 1) *Mobilization (February 2001 - April 3<sup>rd</sup>, 2001)*
- 2) *Phase I (April 3<sup>rd</sup>, 2001- July 15<sup>th</sup> 2001)*
- 3) *Phase II (July 15<sup>th</sup> 2001 - September 27<sup>th</sup> 2001)*

### Ongoing Scope

#### *Ongoing Scope Tasks*

The PMO will support the following elements throughout the scope of eBPP implementation.

1. Identify, manage and report program schedule, and monitor risk mitigation program.
2. Support and coordinate the implementation of specific system elements timed-based on go-aheads from business systems, technical systems, architecture, and public relations teams.
3. Oversee implementation resource availability.
4. This program will extend to the completion of eBPP implementation to the satisfaction of the business requirements. At that point, this program will be terminated and considered complete. Further efforts related to the performance and function of eBPP will transition to normal systems maintenance or “sustainment” processes. Changes and modifications to the eBPP system or processes content that exceed the Business Requirements, or which may be necessary to support additional services, devices, features, or markets not included in the initial launch will be considered outside the scope of this program.

### Mobilization Scope

#### *Mobilization Scope Tasks*

The PMO will support the following tasks during Mobilization.

1. Identify integration stakeholders related to implementing a 3G eBPP solution
2. Research and review requirements and impacts relevant to implementing a 3G eBPP solution, including business, technical, security, and architectural requirements.
3. Review the vendor responses and products for the eBPP solution and assist in making a selection.
4. Develop the scope of the work including the design of iterative implementation processes and architectures that will permit phasing in of the eBPP solution, while keeping continuity with legacy 2G systems, solutions and services.
5. Develop and maintain risk mitigation matrix.
6. Define initial eBPP functionality offered on July 15<sup>th</sup>.

### Mobilization Phase Deliverables

The eBusiness Program Management team will manage the following deliverables during Mobilization:

1. Document eBPP requirements from the appropriate business stakeholders
2. Assist in defining the eBPP product concept
3. Define the program mission statement
4. Finalize program charter through Phase I 2001
5. Assist in finalizing 3G architecture platform
6. Gather requirements from 2G and Portal Business and IT stakeholders that tie into eBPP
7. Prepare a time and cost estimate for implementing eBPP
8. Identify scope and deliverables for Phase I
9. Present the following items to senior management:
  - Product concept for eBPP
  - Phased architecture approach
  - Phased approach for 2G and Portal platforms
  - Time and Cost Estimate for implementing eBPP

#### Phase I Scope

The scope of Phase I is from April 3<sup>rd</sup> 2001 – July 15th 2001

- § *Completion of Phase I is scheduled to support XXX customers*
- § *Implement Phase I eBPP functionality as defined by Mobilization*

#### Phase II Scope

The scope of Phase II is from July 15th 2001 - September 27th 2001

- § *Additional deliverables and scope included for Phase II will be forthcoming upon completion of Mobilization and Phase I*

## 4. Program Assumptions

### General and Administrative

1. The program has a limited life span, and will conclude following the launch of CRM.
2. The Program Manager will set expectations for a communications plan. Communication to stakeholders will follow the communications plan protocols.
3. Program documents will be produced in MS Word format, with the exception of the program work plan which will be created and presented in MS Project (.mpp). Visio diagrams or flows should be copied into Word documents so that team members not equipped with Visio may view them.
4. Established program development standards will be adhered to wherever feasible. However, IT may choose to deviate from SDF protocols if it is deemed necessary to meet program goals.
5. Cross-IT communication will be facilitated through the "3G SWAT" Team.
6. All stakeholders will have the opportunity to review and comment on Business Requirements.

### Functional

1. IT will not be expected to undertake development without approved Business Requirements.
2. Subscribers using the eBPP may have multiple services and access HAW' network via multiple devices for self-service and self-care.
3. Subscribers will be encouraged to use self-service kiosks and On-line Customer Service (OCS) to view and pay their bills which may include charges "Billed on Behalf of Others" (BOBO) fro third parties like Amazon.com or Barnes and Noble.
4. The formatted data will also be sent to the new eBPP system solution that will allow customers to view an interactive on-line bill with variable sorting and aggregation options.
5. The new e-bill will also include new elements such as e-Wallet, "Billing on behalf of" (BOBO) transactions and 3G IP Data and Voice-Over-IP transactions.
6. The new bill will provide multi-lingual and multi-currency presentation for use around the world, and have optional provisions for special needs.
7. Web self-care and Web activations will not be available at 3G launch. (HAW Ref: AS-APP-0018)
8. BIGBILLER can support service charges for equipment on a one-time basis. The process is manual since there is no interface between the inventory and billing system. (HAW Ref: AS-APP-0029)
9. Usage billing data will be available at launch; transaction based data will not be available (HAW Ref: AS-FNC-0202).
10. Lock-box payments will be supported at launch. (HAW Ref: AS-FNC-0209).

11. Postpaid will be the only charging option at launch (there will be no PIA or Prepaid. (HAW Ref: AS-OFF-0300).
12. At launch, customer types will include Enterprise, Small Business and government. The “Me Too” concept must be supported at launch. (HAW Ref: AS-OFF-0301)
13. Billing on Behalf of Others (BOBO) will NOT be available at launch because Qpass cannot support it. (HAW Ref: AS-OFF-0304)
14. There will be no enterprise aggregation; this will have to occur manually. (HAW Ref: AS-PRO-0405).
15. Only HAW customers can access the HAW portal and/or have an E-Wallet provisioned. People who do not have an HAW subscription will not have access to the HAW portal or E-channel wallet capability. (HAW Ref: AS-PRO-0414)

## **Implementation**

1. The new BillMakerInc BigBiller billing system will aggregate rate and summarize the customer bill.
2. CRM will NOT be available at launch. (HAW Ref: AS-APP-0002).
3. The interim solution for eBPP has been cancelled. (HAW Ref: AS-APP-0006)
4. Receivables management reporting will be performed through BIGBILLER. (HAW Ref: AS-APP-0011)
5. Until the CRM application is deployed, the BIGBILLER billing system will function as the order management and CARE system at launch. (HAW Ref: AS-APP-0014)
6. IT and Customer Services will not support provisioning of E-Wallet. Provisioning of Ewallet will be done through an interim Portal tool. It is assumed that at launch the NBO representatives will utilize the designated tool to set-up E-Wallet and Portal accounts for customers. (HAW Ref: AS-APP-0017)
7. At launch, Portal is developing a tool to provision E-Wallet and Portal profile. (HAW Ref: AS-APP-0028)
16. Credit must be approved on all customers using eBPP. (HAW Ref: AS-PRO-0410).
17. HAW launch will be supported by existing call center(s). (HAW Ref: AS-PRO-0401).
18. Legacy data migration is NOT within scope of launch. (HAW Ref: AS-PRO-0404).
19. A minimum six-week test period is required by IT and Business teams prior to market launch. (HAW Ref: AS-PRO-0412).

## 5. Program Approach

The purpose of the eBPP Program is to develop, integrate and implement a “best of breed” eBPP system, capturing all related elements of “the ultimate customer experience”, focusing especially on personalization of the presentation and the simplicity of the invoice statement.

The eBIT program team is generally responsible for two things; 1) the overlay of e-business functionality to 3G IT systems, and 2) creating and presenting the appropriate content for both internal and external customer education. Because eBPP is a presentation layer, customer facing overlay for 3G IT systems, the eBIT team is primarily responsible for the eBPP implementation. However, the eBPP program impacts and requires support from many cross-functional teams.

The following matrix details the teams and roles who share responsibility in eBPP implementation.

### eBPP Implementation Team & System Roles

Department	System or Process	Name
eBIT	EBPP	Scott Poobah
Charging Systems	BigBiller, OCB, Doc1	
	Mediation	
	Nortel SCP, IP (Prepaid)	
Related Systems/applications	EFT	
	e-Wallet	
	CRM	
	Portal	
	Oracle Financials	
IT	Requirements	
	Functional Testing	
	User Acceptance Testing	
Business	Requirements	
	Training Development	
Security	Requirements	
	Functional Testing	
Architecture	Requirements	
	Design	Peter Techieleader
	Functional Testing	
Marketing	Requirements	
Network Operations	Requirements	

## Quality Assurance

Since 3G is an IT initiative, the Software Development Framework (SDF) will be followed where applicable. The SQA Manager and Program Managers will negotiate which key deliverables are subject to informal walkthroughs, reviews or inspections. It is the 3G eBPP Program Manager's responsibility to ensure that issue and change management procedures are followed.

1. The program will be managed by E-Business IT, but will require input from multiple organizations.
2. A cross-functional program team will convene semi-weekly to update program status.
3. Program decisions (e.g., Go, No-Go, etc) will be verified by dedicated sign-off leads.
4. Major program decisions will be referred to the Program Sponsor.

## Communication Plan

After the initial kick-off meeting there will be weekly team meetings (time and date to be designated by team) where the cross-functional program deliverables and schedule status will be reviewed. Each IT team's lead will be responsible for giving status updates and raising issues to be resolved.

All team members will have access to the TechWeb Issue tracker to view and update outstanding issues. Pertinent program information in regard to the eBPP Technology Team will be available on the 3G Intranet Web Site as well as a link to the TechWeb Issue Tracker.

The eBPP Program Manager will be responsible for providing weekly status reports to both the IT 3G Program Manager and eBIT Program Manager.

The IT 3G Program Manager will provide status updates to the IT 3G Program Director on a weekly basis and submit the monthly program status report by the 5<sup>th</sup> of every month to the CIO office and the SIT.

## Requirements Approach

The following is the approach the CGF Technology Team will follow to facilitate the requirement gathering process. The kick-off meeting will engage all of the leads from the respective cross-functional teams.

The next step will be to conduct a (JRP) Joint Requirements Planning session where the core team will discuss the requirement scope of the program and confirm the key feature sets that will be required to provide a billing solution for 3<sup>rd</sup> Generation of Products & Services. Each respective team lead will be responsible for driving the requirements gathering process and engaging the appropriate personnel from their respective functional area. The team lead will be responsible for creating a program schedule, which will be rolled up into the overall program schedule for the eBPP Technology Team.

Currently the following have been identified as key areas of functionality that will be used to derive detailed requirements:

- Ø Billing and Bill Presentment (Consumer & Business)
- Ø Billing and Bill Presentment (Merchant and Company Billing)
- Ø Bill Payment
- Ø Usage Collection / Processing
- Ø Settlement Processing
- Ø Customer Management
- Ø Applications and Services
- Ø Regulatory Considerations
- Ø Change Management
- Ø Strategic Technical/Architecture Considerations
- Ø Technical and Design Capabilities
- Ø Reporting Capabilities
- Ø Security Fraud
- Ø Program Management

Due to the quick turn around needed of Phase 1 completion (July 15<sup>th</sup>) this list will serve as a starting point for the requirements and will be further defined as input is received from the business requirements development activities.

The output from this team will be the program charter, and program management and tracking tools and schedules.

Based upon the overall CGF program schedule, there will be designated walkthroughs and reviews of the document before final approval.

### **Issue Management Approach**

The purpose of Issue Management is to provide a visible decision-making process for the IT Program team and to provide a clear audit trail of all issues and resolutions. Issues designate decisions that cannot be resolved quickly and matters that may impede the progress of the program.

The method to track program issues will be the Issue Tracker on TechWeb. Issues may be raised by any program participant or impacted organization to the 3G Program Manager who will enter the issues into the system and assign an owner for resolution. It is the responsibility of the issue owner to update and close the issues via the Issue Tracker on TechWeb.

Pertinent program information as regards the five eBPP Technology Teams will be available on the 3G Intranet Web Site as well as a link to the TechWeb Issue Tracker.

Resolution of issues will be evaluated against the charter and detailed program work plan in order to assess impact on the dimensions of scope.

## 6. Program Work Plan

### Program Timeline and Phasing

The new eBPP system is expected to launch in July 15<sup>th</sup> 2001. The second phase of the launch will be in September 27<sup>th</sup> 2001.

The following table represents the milestone dates for this program. ATTWS reserves the right to change the dates but will notify each respondent by email of any changes it makes in the schedule dates.

<b>Description</b>	<b>Date</b>
RFP Distributed	<b>Friday 01/24/01</b>
Vendor Question Due	<b>Wednesday 01/31/01</b>
HAW Question Responses Due	<b>Friday 02/02/01</b>
RFP Responses Due	<b>Wednesday 02/07/01</b>
RFP Evaluation	<b>Monday 02/12/01–Friday 02/16/01</b>
Notify Short List of 2-3 Vendors	<b>Friday 02/16/01</b>
Vendor Demonstration and Presentations	<b>Tuesday 02/20/01-Friday 02/23/01</b>
Vendor Notification	<b>March 08, 2001</b>
Initial Phase I Launch	<b>July 15<sup>th</sup> 2001</b>
Phase II Launch	<b>September 27<sup>th</sup> 2001</b>

### Objectives

The following are key objectives for the eBPP Program Team:

1. Market assessment of available wireless and IP eBPP vendors, and their capabilities for supporting billing presentation and payment of 3G products and services
2. Creation of and consensus for eBPP Requirements: 1) Business, 2) Technical, 3) Architecture, 4) Security
3. Management of business requirements documentation
4. Development of iterative architectural solution plan
5. Development of iterative security solution plan
6. Schedule testing cycles: security, functional and user acceptance
7. Design pilot/beta market launch program
8. Design training solutions: Admin, CSR, Helpdesk, Sales, Marketing, Technical, etc.
9. Formulation of an implementation plan to Senior Management, including Times and Costs
10. Provide program management for market and technology trials to ensure smooth implementation of the eBPP solution
11. Develop a risk management and issue validation and escalation program to ensure timely program completion

12. Conversion to an integrated IT solution for eBPP

## **Key Activities and Deliverables**

1. Delivery of cross-functional eBPP requirements document
2. Selection of an eBPP vendor and product
3. Delivery of Architectural Solution Plan
4. Delivery of Security Solution Plan
5. Delivery of Implementation Plan to Senior Management
6. Receive approval and funding for the program from Senior Management
7. Successful performance of Security Testing
8. Successful performance of User Acceptance Testing
9. Successful performance of Functional Acceptance Testing
10. Successful performance of Training: Admin, CSR, Helpdesk, Sales, Marketing, Technical, etc.
11. Successful completion of market beta/pilot launch
12. "Go-live" with an eBPP solution, July 15<sup>th</sup> 2001

## **eBPP Dependencies**

[Need to review with Don. See what kind of content the other two programs are including here. We may be able to include a strawman here.]

## **Critical Success Factors**

1. Timely selection of eBPP vendor and product
2. Executive ownership/sponsorship and funding of program initiative
3. A sponsor who is actively involved in the program strategy and direction
4. Ownership/participation/SME availability from cross-functional teams
5. A well-constructed program plan
6. Consistent Program Manager
7. Integrity of vendor support
8. Teams of resources whose responsibilities and relationships are clearly defined in writing
9. A clear definition of deliverables and associated benefits
10. Clearly defined change control procedures
11. Consistent technology enablement
12. Adequate and appropriate security
13. Clearly defined scope
14. Solution Performance: elements of the bill presentment, specifically in the area of usage, and other daily activity will need to be presented electronically in real-time (within 5 seconds)

## 7. Resources/Roles/Responsibilities

The following roles and responsibilities have been selected for involvement in this project. Additionally, a preliminary list of individuals to fill these roles has been identified.

Roles	Name	Department	Phone
Program Sponsor	Scott Poobah	E-Business IT	
Program Manager	John Boss	E-Business IT	
Program Analyst	Abdul Smartie	E-Business IT	
Program Analyst	Mark Colborn	E-Business IT	
<b>Business Team Signoff Leads</b>			
<b>IT Team Signoff Leads</b>			
E-Business IT	Scott Poobah	E-Business IT	
Program Team	John Boss		
Architecture	Peter Techieleader	E-Business Architecture	

**Program Sponsor:** The Program Sponsor is responsible for managing the program at the executive level. The Program Sponsor has final approval authority on all phases of the program.

**Program Manager:** The Program Manager is responsible for managing the program in cooperation with all organizational stakeholders. The Program Manager is responsible for managing the change management process, managing project issues and risks, communicating the program status to all stakeholders, identifying and resolving conflicts in priorities and resource constraints, and completing change control documentation.

**Program Analyst:** The program analyst supports the Program Manager in all phases of the project. Support may include such functions as maintaining the project plan, maintaining the issues/risk log, creating documentation, etc.

[This list of roles and responsibilities is currently incomplete and will be updated as information is defined.]

## 8. Change Management

### Change Management Approach

This process defines evaluation and elimination of proposed changes to the IT program and program scope. All changes to scope or baselines will be reviewed by the IT 3G Program Director, Program Manager and related IT Program Manager. A deliverable or work product is considered part of the program baseline when approved and signed-off by the Program Manager and applicable owners. Change Requests are formally defined changes in program scope, as defined in this document.

Change Requests (CRs) for functional and business requirements are managed by the sponsor or Program Manager of this program. If a new requirement is identified after the development of the system requirements, it may be necessary for the original/current implementation schedule to be re-negotiated to maintain the quality of the deliverables.

Below is a high level overview of the change management processes.

**Initiate a Change Request (CR):** The customer sponsor, stakeholder(s) or Program Manager can initiate the CR. The request should include a description of the change, business reason for the change, desired priority of the modification, desired time frame for the completion, client contact, preferred means of contact, and date of request. The change should be forwarded to the program manager.

**Analyze the Change Request:** The CR is assessed to determine if the change can be incorporated into the current release schedule without any impact on the quality or schedule of the program. After the Program Manager reviews the impact, the CR will be forwarded to the development group and additional subject matter experts as needed. After analysis of high-level time and cost estimates, the change is then approved, rejected or deferred.

**Prioritize and Schedule the Request:** If the CR is approved, the Sponsor or Program Manager establishes the priority of the implemented request and determines where in the program schedule the change best fits.

**Revise the Program schedule:** Based on the scope and priority of the request, the program plan will be revised to reflect the impact. Adding scope will change program completion date, resources, and/or cost that the business sponsor must agree to.

**Implement Change:** The request will be developed and implemented, if the change request is approved a new schedule and budget will be published to implement the change. The Program Manager will keep a log of all change requests and their status.

The following matrix summarizes the Change Management process.

### Change Management Matrix

Activity	Responsible Party	Deliverables
Initiate the Request	Any team member may initiate a change request.	The following minimum information will be due to the Program Manager: <ul style="list-style-type: none"> <li>• Change description</li> <li>• Rationale</li> <li>• Desired priority</li> <li>• Desired time frame</li> <li>• Date of request</li> </ul>
Analyze the Request	Program Manager, Change Review team TBD	Change review board will perform the following: <ul style="list-style-type: none"> <li>• Analyze the change for compliance with program scope, accept, reject, defer or refer the request to an appropriate group.</li> <li>• Notify other affected groups, if an accepted change has cross-functional impacts.</li> <li>• Revise the master requirements as necessary to reflect the change.</li> </ul>
Prioritize and Schedule the Request	Program Manager, Development Lead	Program Manager and Development Lead will prioritize the request relative to work currently in progress and determine where in the schedule the change best fits. Program Manager will advise team.
Revise the program Schedule	Program Manager	The program work plan will be revised as necessary to reflect the impact of the change.
Implement Change	Development Lead, other team members as appropriate	The change will be implemented.

## 9. Risk Management

The Program Manager will track risks. All cross-functional team members are encouraged to submit potential risks to the Program Manager at any time.

Risks will be categorized as follows:

- **Program Risk:** Risks arising from program resource or timeline constraints
- **Business Risk:** Risks arising from business relationships, organizational structural issues, or strategic concerns.
- **Technology Risks:** Risks arising from hardware procurement, related system or software launches, or any other factor that could affect the program by constraining necessary technical resources.

For a detail of issues and risk management, please refer to the Risk Management Log.

## 10. Success Criteria

- Ⓟ eBPP solution has been successfully launched in accordance with the phased deployment schedule described in the program work plan.
- Ⓟ All system and acceptance testing has been successfully completed and documented, with any exceptions identified and resolved.
- Ⓟ The deployed system contains all elements of the approved Business Requirements, and all elements comply with requirements detail.
- Ⓟ Stakeholders have completed a post-mortem evaluation of the program and implemented any necessary improvements.
- Ⓟ The program has been closed on schedule, and the ongoing maintenance/feature integration of the content has been handed over to IT for maintenance.
- Ⓟ Successful transition phase with hand-off of appropriate documentation to the maintenance team.

## Outstanding Items

The following elements will be added to this charter as they are developed:

- Change Control Board Members
- Change control process flow
- Information on Change Request Template
- Information on where change request and status information will be posted.