# Marketing Requirements Document

**Release 2 SuperSoft**

Authors: Ed Ek, Fred Frick, Jane Doe, Doe Adead

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<th>Rev.</th>
<th>Date</th>
<th>Author/Editor</th>
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<td>Draft</td>
<td>7/1/98</td>
<td>Ed Ek</td>
<td>Rewrite of the previous version</td>
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<td></td>
<td>7/10/98</td>
<td>Fred Frick</td>
<td>Addition of DM, KM and Market Factors sections.</td>
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<td></td>
<td>7/18/98</td>
<td>Ed Ek</td>
<td>Fleshed out DM and KM Process descriptions and Requirements, and added DS/EIS process diagrams.</td>
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<td>7/27/98</td>
<td>Jane Doe</td>
<td>Updated OM/RM requirements section</td>
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<td>8/4/98</td>
<td>Jane Doe</td>
<td>Removed DM and KM sections. Changed title to R2, to avoid confusion that RM refers only to OM. Moved RM related OM requirements, to a new RM requirements for OM section.</td>
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<td>V 1.0</td>
<td>8/6/98</td>
<td>Jane Doe</td>
<td>P.Team review and revision. Version 1.0 published to Engineering for scoping and review.</td>
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<td>9/21/98</td>
<td>Sue Doe</td>
<td>Minor additions and clarifications based on extended review and comments. Revised market factors section.</td>
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<td></td>
<td>9/29/98</td>
<td>Doe Adead</td>
<td>Modified and added/updated/removed requirements in the following sections: 10.3 Short-term Revenue Forecasts 11.3 Create Prospective Profile Profile 11.5 Create Solution Design – removed all requirements and added to future (DM integration feature).</td>
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Table of Contents

1. Executive Summary .............................................................................................................. 3
2. Related Documentation ........................................................................................................... 3
3. Issues ..................................................................................................................................... 4
   3.1 Open Issues ...................................................................................................................... 4
   3.2 Closed Issues .................................................................................................................. 4
4. Target Release Dates ........................................................................................................... 4
5. Market Factors ...................................................................................................................... 4
   5.1 Target Market .................................................................................................................. 4
   5.2 Risk Analysis and Assumptions ...................................................................................... 5
   5.3 Competitive Analysis ...................................................................................................... 6
   5.4 Differentiators ................................................................................................................ 8
6. User Profiles ......................................................................................................................... 8
   6.1 Business Development Professional .............................................................................. 9
   6.2 Resource Manager .......................................................................................................... 9
   6.3 Project Manager ............................................................................................................... 9
   6.4 Etc, etc ............................................................................................................................ 9
   6.5 Customer ......................................................................................................................... 9
   7.1 Business Needs .............................................................................................................. 10
   7.2 Business Process Model ................................................................................................. 11
   7.3 Benefits .......................................................................................................................... 12
   7.4 Professional Development .............................................................................................. 12
   7.5 Resource Deployment .................................................................................................... 13
8. Resource Management Requirements ............................................................................... 14
   8.1 Resource Profiling and Assignment .............................................................................. 15
   8.2 Advanced Resource Scheduling ..................................................................................... 15
   8.3 Supply-Side Revenue Forecasts ..................................................................................... 15
9. Infrastructure Requirements ............................................................................................... 16
   9.1 Access Control ............................................................................................................... 16
   9.2 SuperSoft Integration ...................................................................................................... 16
   9.3 Templates ....................................................................................................................... 16
   9.4 Attachments and Hyperlinks ......................................................................................... 16
   9.5 Performance and Scalability .......................................................................................... 17
   9.6 DBMS Support ............................................................................................................... 17
Appendix A: Report Requirements .......................................................................................... 18
1. Executive Summary
SuperSoft Release 2 provides critical front office tools that match client demand with the supply of skilled resources to help optimize utilization and profit. Sales Manager allows business development professionals to develop and manage prospect relationships in order to build a healthy pipeline of opportunities. Tracking the progress, profitability and win confidence of the opportunity through the stages of opportunity development facilitates team-based opportunity development and reduces the amount of time and money spent in the sales cycle. The pricing capability allows users to quickly estimate the cost, price, and profitability of a project. Release 2 also enables Sales Manager to leverage Resource Manager capabilities by improving the accuracy and dependability of revenue forecasts and producing estimates based on capacity to deliver. Business development professionals can get up to the minute details on resource availability and easily request resources for staffing. Notifications increase communication between the owners of the resources and the owners of the work, which improves response time, utilization and ultimately maximizes profitability.

Feature highlights:

Supply vs. Demand View
The Supply and Demand View is a graphical representation of the demand and supply of resources over time in terms of both resource and revenue. Report filters help users see only the information of interest to them. Executives, Business Development Professionals (BDP), and Resource Managers will use this information to help manage through the peaks and valleys of a service business. They need to understand what types of business they should be trying to sell based on the types of resources currently under-utilized and, the types of resources they should be hiring or training to satisfy future demand.

Opportunity Profiling and Progress Tracking
This feature provides a consolidated place to record opportunity information and a consistent way to classify and report progress and win confidence on each opportunity. Strategic fit checklists help identify at a very early stage, which business to pursue. Activity notes, email notifications and links to detailed project information, enable collaborative opportunity development and team-based selling. Data captured during the business development process, such as pursuit activities, competitive information and final outcome, are key inputs to other features such as the supply/demand view and win/loss analysis.

Pipeline View
The Pipeline View reports on the number and magnitude of pipeline opportunities in each stage of development. This enables the BDP to see the big picture and ensure a healthy mix of new business. The BDP and the Sales Executive can understand the velocity of opportunities through the pipeline and take corrective actions when an opportunity is not moving through the sales cycle as quickly as expected.

Resource Locator
This provides the BDP with the ability to do a “quick-check” on resource availability very early in the sales cycle, to identify any known resource constraints that would inhibit delivery of the project.

2. Related Documentation
- Sales Manager Product Plan
- Resource Manager Product Plan
- Etc.
3. Issues

3.1 Open Issues
None

3.2 Closed Issues

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<thead>
<tr>
<th>No.</th>
<th>Issue</th>
<th>Resolution</th>
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<tbody>
<tr>
<td>1.</td>
<td>Is there any real difference between tracking leads and profiling clients in the OM process?</td>
<td>No – combined the 2 into a single process.</td>
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<tr>
<td>2.</td>
<td>Do we need to integrate with ABT instead of MS Project?</td>
<td>Need to integrate with several PM packages. This will not be in R2 and the order will be dictated by CC demand</td>
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<tr>
<td>3.</td>
<td>Should we address the integration with a project management tool in a separate section, or sprinkle it throughout each part of the process where it fits (i.e., OM and DM)?</td>
<td>It will not be in R2, therefore non-issue</td>
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<td>4.</td>
<td>Need exact calculations for utilization, realization and leverage for analyzing the investment for an opportunity. Removed the requirement to estimate project utilization.</td>
<td>Done. AD</td>
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<td>5.</td>
<td>Do we need “program” in the work breakdown structure?</td>
<td>Requirement removed from this release</td>
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4. Target Release Dates
The target dates for Release 2 of SuperSoft are as follows:

<table>
<thead>
<tr>
<th>Release</th>
<th>Status</th>
<th>Date</th>
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<tbody>
<tr>
<td>2.0</td>
<td>Beta</td>
<td>January 1998</td>
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<tr>
<td>2.5</td>
<td>GA</td>
<td>March-April 1998</td>
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5. Market Factors

5.1 Target Market
SuperSoft is targeted at knowledge-intensive, high-value service organizations. SuperCo has four specific initial customer groups for the SuperSoft product:
- Management Consulting Companies
- IT Services Companies

The core service process executed and managed by these four types of service organization are basically the same, so our product’s features are useful to all of them. The target groups’ processes differ only in naming conventions and in the organization’s emphasis on different parts of the service lifecycle.

Specifically:
- ISOs do not think in terms of ‘customers’ and ‘opportunities’, but in terms of ‘departments’ and ‘projects’.
• Within ISOs there is a more centralized management of the projects that will be pursued by the organization, so the need for opportunity management capabilities is less widespread, but is definitely there.
• PSOs and ISOs are being pushed by their organizations’ executive management to operate more like consulting companies. This will lead to their adoption of a more decentralized service management process, making the standard process supported by SuperSoft more broadly applicable to these Divisional markets.

The size of this market is estimated at two to three billion dollars, annually. The customers in this market currently have no effective, integrated service automation solutions. Historical reasons for this are:

• Pre-web technologies were a poor fit for an effective solution.
• Larger customers have internally-developed solutions.
• Large applications companies have focused on manufacturing solutions rather than services solutions.

5.2 Risk Analysis and Assumptions

Technology
• The general business market perceives Java to be immature and slow.
• SuperCo’s solution is still heavily dependent on non-Java technologies (i.e. Windows NT and Microsoft SQL Server).
• SuperCo is one of the first enterprise-scale solutions written using Java and the market is currently very skeptical of the enterprise possibilities for Java itself.

Resources
• Our customers want us to deliver a broad and complete solution as soon as possible. This is not feasible with the current development resources at our disposal.
• Java developers are currently difficult to find.

Time to Market
• We have a big advantage in our use of Internet and web technologies. If we do not move quickly our larger customers are likely to refine their internal systems to make more effective use of these technologies, making our solution less appealing and harder to differentiate from the solutions they already have.
• The longer we wait, the more time our competitors have to verticalize their products or reposition themselves to dominate our market.

Competition
• Five companies could reposition themselves to serve our market. Their products are currently positioned only at IT services organizations but could be reconfigured for our other initial market segments. All of these vendors are known to be investigating or developing product features for our market.
• The major ERP vendors have or are reported to be working on vertical solutions for the services market (Oracle and SAP). These vendors’ solutions are currently very weak.
• The main customer management vendors are also positioned to configure their products for our market. With recent bad press, both are looking for ways to expand their markets.
• There is always a risk of another cloaked startup hitting the marketplace with a similar product to ours. It is doubtful that a similar scale of product features could be presented by such a player in the short term.
Market Clarity
- Many PSOs and ISOs are poorly organized. This is an advantage only if we can educate these customers as to the value of SuperSoft - as one component of the solution to their management problems.
- Internal service divisions do not follow a process identical to the one implemented by SuperSoft, but most of them would benefit by doing so. These organizations may require major operational process adjustments to successfully use our product.

Assumptions
- ERP vendors are more focused on each other than emerging specialist-market vendors like SuperCo.
- Customer-management vendors are more focused on help-desk and field-service markets.
- Smaller vendors are more focused on IT department management than general services management.

5.3 Competitive Analysis
The following table shows how our key competitors’ product features compare to those of the 2.0 release of SuperSoft.

Conclusions that can be drawn from this table are:
- Adding DM features would make our product more competitive – specifically time & expense capture, billing, revenue reporting, and performance analysis. (More than half of the other vendors offer these features)
- Adding the capability to integrate with Project Management and financials products would make our product more competitive. (More than half of the other vendors have these capabilities)

There are some features for which fewer than one third of other vendors offer support. These features are: contact management, qualification, scenario modeling, revenue forecasting, resource optimization, and backlog management, etc. However these features should not be removed from the scope of this release as they are specific to our vertical industry choice and are therefore differentiators for SuperSoft.
<table>
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<tr>
<th>Feature</th>
<th>SuperSoft 1.0</th>
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### Key
- 1 = feature fully supported,
- # = feature partially supported,
- T = feature supported by third party product
5.4 Differentiators

Services
SuperSoft is designed to support the core business services management process.

Other products in use were either designed for something else such as application development or call-center management, were not designed as a cohesive solution, i.e. they are an accumulation of point solutions, or are custom-developed solutions that are not commercially available.

It is important to note that software designed for product companies does not provide sufficient or equivalent capabilities in a service environment. They provide too many product configuration and order entry features that are useless to service companies, and too few resource availability and assignment features that are critical to service companies.

SuperSoft offers a true solution because it supports the scale and distribution of the service enterprise, and the unique requirements of the service management process.

Integration
We implement an integrated solution for the whole service enterprise – managing a single set of information, through a single UI, across the functional boundaries of the organization. This integration offers capabilities that are critical to success, giving the enterprise a single source for demand, capacity, capability and performance information, and ensuring this information is managed and available consistently and accurately across all participants in the service process.

Technology
Our technology choices, including the Web and Java, are important for the services industry because they allow us to support business-critical information and communication management across a highly mobile or distributed organization.

Simplicity
Our product provides a practical solution to the management problems of the services enterprise. Its aim is to support 100% of the services management process, at a lower cost and without the ‘feature bloat’ that results from either integrating point solutions or repurposing other software.

SuperSoft™ is designed to support the services management process without duplicating the core functionality of complementary software products, such as ERP systems and Project management tools.

Flexibility
Built using Java and other leading-edge object technologies our product offers a rapidly customizable and easy to implement solution that can operate in a diverse and distributed systems and business environment.

6. User Profiles
The following sections profile the types of individuals that will be using SuperSoft. The reasons why and ways in which each individual will use the product differ between the profiles. However, depending on the size of the company and the organization’s business practices, a single individual could fall into multiple user categories.
6.1 Business Development Professional
The Business Development Professional (BDP) is a person within an organization who pursues and closes business. Typical synonyms for this type of person include Account Manager, Partner, Senior Manager, and Sales Executive.

The BDP is responsible for executing the company’s business development operating plan. The BDP typically has a territory, quotas, and performance goals.

The BDP will use SuperSoft on a daily basis to manage the activities of a single sales opportunity, as well as managing the multiple opportunities within his/her territory. The BDP will also use SuperSoft to forecast revenue for his/her territory.

BDPs spend a lot of time travelling and therefore require portions of functionality to run off-line (disconnected from the network).

6.2 Resource Manager
The Resource Manager (RM), along with employees, manages employee training and career growth. Typical synonyms for this type of person include Functional Manager, First Line Manager, Mentor, Counselor and Manager.

The RM has hiring and firing authority and is responsible for performance appraisals, compensation and updates to the human resource management system. The RM works proactively with employees to develop a training, education and career development program tailored to the employee’s career objectives.

Often, the RM must approve all project assignments for the employees that report to him/her to ensure that the assignment supports the individual’s career development plans. The RM would use SuperSoft on a weekly basis to approve resource assignments.

6.3 Project Manager
The Project Manager (PM) leads the solution delivery effort. Typical synonyms for this type of person include Project Lead, Case Team Leader, and Team Leader.

The PM develops the statement of work and supporting information for the project delivery plan. The PM ensures that all of the resources needed to deliver the project are identified and committed to the project. (S)he also approves the resource assignments and schedule changes for his/her projects.

During execution of the project, the PM is responsible for reporting status of the project to the BDP and other members of management. The PM also approves time and expenses from project team members and sends a trigger (with approved time and expenses) to the billing or accounts receivable function. The PM also contributes performance feedback on each project team member during and/or after every project.

The PM will use SuperSoft during the latter stages of the pursuit to create solution design, define project profiles, create project teams and request resources, then on a weekly basis to make schedule changes, request additional resources and approve time and expenses and forward to billing.

6.4 Etc, etc...............
7. Resource Management Business Process
The following sections discuss the resource management process of a typical service organization.

7.1 Business Needs
Human resources are the primary assets, and often the sole assets, of a service organization. Effective and efficient management of personnel resources is perhaps the most important process within the organization. However, effective and efficient resource management is quite difficult. When making decisions about how to use resources, managers must strike a balance between corporate goals, client demands, and needs and preferences of individual resources.

The logistics of getting the right people onto the right projects at the right time can be complex. Resource coordinators need to match the demand for resources with actual skills and availability of people within the organization. Resource coordinators often need to shift resources between assignments in order to satisfy competing demands.

Service organizations typically employ external resources on a temporary basis to supplement capacity. The use of external resources further complicates resource deployment, as the number of resources managed and the number of parties involved expands. In order to manage quality of delivery, managers need tools to help them understand where external resources are and what types of work they are doing for the organization.

Employee retention is a major issue in most service organizations. Attrition rates vary between 20-30% each year. Often a resource leaves before the organization breaks-even on the employee recruiting and training investment. A key reason why people leave service organizations is that they are not given the opportunity to work on the types of projects they want. To help retain the best people, managers need to factor employee preferences and other professional development issues into resource deployment decisions.

An important metric monitored by most service organizations is resource utilization. Typically an organization will set utilization targets for each individual. Managers monitor the forecasted utilization of resources within their domains and use this metric as input to resource deployment and business development decisions. Furthermore, this forecast of resource utilization is the primary input to short-term revenue forecasting.

.....
7.2 Business Process Model

Professional Development

- Profile resources
- Assess skills
- Obtain approvals
- Compare to career model
- Identify skill gaps
- Create development plan

Resource Deployment

A: Connects from Oppty. Management
B: Connects within Resource Management
E: Connects from Oppty. Management

- Receive resource request
- Search for qualified resources
- Identify candidates
- Obtain approvals
- Deploy resources

- Receive assignment request
- Search for billable assignment
- Identify assignments
- Submit recruiting needs
- Request training

Capacity Planning

- Forecast resources
- Forecast revenue (short-term)
7.3 Benefits

Automating portions of the resource management process can lead to vast improvements to the bottom line. Tools to help the Resource Coordinator match resource supply, including external resources, with resource demand from a given client project can streamline operations and reduce the number of Resource Coordinators needed in the organization.

In addition, factoring employee preference and development goals into resource deployment decisions will help the organization retain its most valuable asset – its people. This, in turn, will optimize the organization’s return on its recruiting and training investment.

Furthermore, accurate forecasts of resource utilization will help drive business development and resource deployment initiatives that maximize utilization and profitability. These utilization forecasts also drive short-term revenue forecasts, which give management early indication of whether or not the company is on track to meet their financial goals.

Finally, tools that enable management to accurately predict future resource shortfalls, based on known and forecasted demand, help maximize the organization’s ability to grow and maximize profitability.

7.4 Professional Development

Profile resources

In order to deploy the right resources to the right place at the right time, the Resource Coordinator must have a profile for all resources. The profile includes basic contact information about the resource, the resource’s skills and experience, the resource’s work preferences, details about the organization to which the resource belongs, etc. Some of this information will be imported from the HRMS system. If the company also wishes to search the pipeline of candidates when trying to find an appropriate resource for a project, candidate profiles should be imported from the recruiting system.

Assess skills

A resource’s skills must be assessed in order to place him/her on project work effectively. The assessment involves rating an individual against a set of proficiency levels for each skill that he or she possesses.

Obtain approvals

Often a skill assessment must be approved. For example, if resources self-assess against a set of skills, their manager may want to review and approve that assessment before it is used in the resource deployment process.

Compare to career model (performance management integration)

A Resource Manager will often compare the skills that a resource currently has to those required for a particular career path or career goal. In order for this process to take place, the enterprise must have developed a career model that clearly identifies the career paths in the company and the skills necessary to achieve each step along the path.

Identify skill gaps (employee development integration)

Once a resource’s current skills have been compared to the enterprise’s career model, the Resource Manager can identify the gaps between where the resource currently is and where he/she wants to go. These gaps are the basis for the development plan.

Create development plan (employee development integration)

Given the gaps between a resource’s current skills and those required for the resource’s desired career path, the Resource Manager, along with the Service Professional, can generate a development plan. This development plan specifies the training and experience that the resource needs in order to gain the skills required for the chosen career path.
Request training (training integration)
Training is one way in which a Service Professional can gain the skills needed for a particular career path. Suggested training courses are typically one of the items that appear on a Service Professional’s development plan.

Request development assignment
On-the-job training is another way in which a Service Professional can gain the skills needed for career development. The Resource Manager will sometimes suggest that the Resource Coordinator find a project that will give a Service Professional the skills or experience needed to further the resource’s development.

Collect performance feedback
Throughout the year, the Resource Manager will collect feedback on a Service Professional’s performance on project work. Some companies have implemented a 360° evaluation process, whereby a Service Professional’s peers, reports and managers all evaluate him/her. Other companies follow a more traditional model of having the Resource Managers and Project Managers evaluate a particular Service Professional. The feedback collected throughout the year provides input to the performance reviews, which typically occur annually.

Review resources (performance management integration)
At certain points throughout the year, annually in most companies, each Service Professional within the organization receives a performance review. The Resource Managers typically conduct the performance reviews for each of their direct reports. Because the Resource Manager may not work directly with each Service Professional throughout the year, input from Project Managers and other Service Professionals who have had direct interaction with the person being reviewed is critical to an effective review. The performance review is the basis upon which promotion, compensation increases and further resource deployment decisions are made.

7.5 Resource Deployment

Receive resource request
Resource Coordinators will receive requests for resources from various other individuals within the organization. For example, the BDP may request resources with availability to work on a pursuit effort. Likewise, Project Managers will request resources with specific skills to form a delivery team. The recruiting department may request resources with degrees from certain universities for help with on-campus recruiting. These requests come in many different formats with various levels of detail and specificity.

Search for qualified resources
The Resource Coordinator will attempt to fill the request by searching for a resource with the desired characteristics. This process is facilitated by the Team Builder feature in R1.0.

Search for trainable resources
If no resource is found with the exact characteristics that were requested, the Resource Coordinator will attempt to locate a resource that could be trained to fulfill the needs. This is also facilitated by the Team Builder feature in R1.0.

Request training
If a trainable resource is located, the Resource Coordinator may request that the Service Professional complete the training before the resource is deployed onto the assignment.

Search for contract resources
Equally, the Resource Coordinator may look outside of the organization, to a subcontracting
agency or to independent contractors, for someone to fill the demand. This process is
facilitated by the Team Builder and Resource Pool features in R1.0.

Submit recruiting needs

Equally, the Resource Coordinator may submit a request to recruiting that someone be hired.

Identify candidates

If resources with the characteristics requested are located, the Resource Coordinator
identifies them as "candidates" to fulfill the request. The Resource Coordinator usually likes
to generate a list of possible candidates, in the event that one or more of the resources
cannot fulfill the request. This process is facilitated by the Team Builder feature in R1.0.

UReceive assignment request

Because resource utilization is one of the key metrics for financial performance in a services
business, the Resource Coordinator will often receive requests to find billable work for
particularly resource. These types of requests come when new hires come on board, when a
resource is currently "on the bench" (i.e., not on a billable project), or when a resource needs
to gain some skills through a certain developmental assignment.

Search for Bill

Upon request, the Resource Coordinator (or a Business Development Professional) will
search for Bill to put him to work.

Search for non-billable assignment

If the RC or BDP does not find a billable assignment for the resource, he/she will look for
non-billable work. Non-billable work could take the form of internal projects, a pursuit effort,
or perhaps even a training course. This process is facilitated by the Team Locator feature in
R1.0.

Identify assignments

If potential work for the resource is located, the Resource Coordinator (or BDP) identifies
assignments for the resource. The Resource Coordinator (or BDP) usually likes to generate
a list of possible assignments, in order to give the Service Professional or Resource Manager
a choice. This process is facilitated by the Team Locator feature in R1.0.

Obtain approvals

Once candidates are identified for a project, or assignments are identified for a resource, the
actual assignment of a person to a piece of work must be approved. Typical participants in
the approval of an assignment include the Service Professional being assigned, the Project
Manager for the project, and the Resource Manager to whom the resource reports.

Deploy resources

Once all approvals for an assignment are obtained, the resource can be committed to the
project. At this point, all interested parties are notified (usually the Service Professional, the
Project Manager and the Resource Manager) and the Service Professional’s schedule is
updated to reflect the assignment.

8. Resource Management Requirements

Requirements are listed in order of development priority.
8.1 Resource Profiling and Assignment
The BDP or Project Manager needs to use the resource cost and rates for pricing and profitability estimates. This cost and rate needs to be a part of the resource's profile and role definition within SuperSoft.

Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-79</td>
<td>Track resource standard cost in the resource profile and standard cost and rate on role definition.</td>
<td>Must have</td>
</tr>
</tbody>
</table>

8.2 Advanced Resource Scheduling
Resources within service organizations are scheduled very differently. Senior managers or subject matter experts with high billing rates may only be required at certain intervals during the product. For example, the expert may only be needed a few hours a week or one day each month. Resource Coordinators and Project Managers need to be able to allocate resources to projects in many ways, to optimize time utilization for short assignments to multiple projects.

Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-82</td>
<td>Allow assignment by the hour</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-83</td>
<td>Allow intermittent assignments to a project (e.g., one day per week for six months, one hour per month, etc.)</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-85</td>
<td>Include above schedule enhancements in the display of a resource’s schedule</td>
<td>Must have</td>
</tr>
</tbody>
</table>

Note: These requirements are covered by R1 Advanced Scheduling features for WH.

8.3 Supply-Side Revenue Forecasts
A primary goal for all individuals in a service business is to ensure that the organization meets its published financial measures, such as quarterly revenue and earnings. Executives use periodic revenue forecasts as a mechanism to gauge whether the business is on target to meet these financial goals. Supply-side revenue forecasts (also known as short-term forecasts), are generated by examining the current supply of resources and their existing project assignments. The total time for each project assignment is multiplied by the resource's billing rate to generate a resource-level revenue forecast. These resource forecasts are rolled-up to a business unit level, and Executives use them to help take the pulse of the business.

Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-86</td>
<td>Enable the customer to configure the time horizon (in weeks) for the revenue forecast (e.g., 13 weeks)</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-87</td>
<td>Calculate the resource’s billable hours over the next X weeks. This calculation should net out any overlapping non-billable time commitments, such as vacations. The calculation should also only include project assignments to Active projects (i.e., projects that have been sold).</td>
<td>Must have</td>
</tr>
</tbody>
</table>
### Infrastructure Requirements

*Requirements are listed in order of development priority.*

#### 9.1 Access Control

See March/April requirements document for Sales Manager R2 access control requirements.

#### 9.2 SuperSoft Integration

See March/April requirements document for preliminary integration requirements, based on Whittman-Hart implementation.

#### 9.3 Templates

Speed and standards are critical to the uniform service offered by large service organizations. The application should eliminate the need for tedious data entry. Additionally, the use of best practices should be promoted. Defining the requirements for the pursuit teams and processes for an opportunity and creating project teams could benefit from the use of templates. Templates increase the enterprise’s speed of response by ‘jump-starting’ many tasks and providing reusable material to the service resource. Templates also offer a mechanism through which guidelines and standards can be distributed through the organization. Templates should be neither difficult to create or difficult to use, so providing one set of tools to the user for both template and instance creation is the best approach.

The template tool should help the user perform the following tasks:

- Quickly define the resource requirements for a specific type of pursuit or project team
- Use best practice pursuit stages templates to efficiently track and progress the sale

Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-116</td>
<td>Use Team templates to automatically populate the “teams and positions” with the number of resources required and skill requirements per role. Add or change information for the specific team.</td>
<td>Must have</td>
</tr>
</tbody>
</table>

#### 9.4 Attachments and Hyperlinks

When managing service-related information users frequently would like to provide detailed annotations, deliverable examples, or document templates to assist their team members in handling clients, resources, or projects. To support this SuperCo should allow users to add URLs pointing to files outside the boundaries of the SuperSoft database. The application should allow users to attach related files, comments, resumes or web pages to both pursuit activities and resource profiles. Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-128</td>
<td>Roll-up these resource forecasts for each resource pool.</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-89</td>
<td>Roll-up these resource forecasts for each organization unit in the organization structure.</td>
<td>Nice to have</td>
</tr>
<tr>
<td>OM-129</td>
<td>Roll-up these resource forecasts for each project in the pipeline.</td>
<td>Nice to have</td>
</tr>
</tbody>
</table>
### 9.5 Performance and Scalability

If used as expected SuperSoft will become a critical tool for the management of the service enterprise and as a result the product is likely to be ‘open’ on a large number of desktops within the user’s organization. The product should not suffer significant performance degradation as a result of high concurrent usage else it will fall into disuse, and eventually the enterprise will cease using it. SuperSoft must provide rapid response when used by a large, international organization.

Requirements for this feature are as follows:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-136</td>
<td>Supports application response time of 1 - 5 seconds. 5 seconds might be for large queries for example.</td>
<td>Must have</td>
</tr>
</tbody>
</table>
| OM-138 | Supports application use by 30 concurrent users (Whittman-Hart)  
Note: Number of concurrent users was reduced from 200 based on expected March installs | Must have |

Note: See Self SuperSoft MRD for a description of performance and scalability requirements, specific to Self-SuperSoft.

### 9.6 DBMS Support

<table>
<thead>
<tr>
<th>N/A</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
</table>
| OM-152 | Provide support for MS SQL Server 7.0 on NT and Oracle 7.3 and 8 on NT.  
Note: Priorities might be changed based on customer demand | See note  |
Appendix A: Report Requirements

The following table can be used to review the potential report requirements included in this MRD. During Engineering design, some requirements may be implemented as two or more reports. In addition some requirements may be implemented as online views. In this case, the reports would still be useful but not required.

Note that this is an initial list of reports, based on de-scoped R2 feature requirements. Actual reporting requirements have not yet been defined for this release. Consequently, additional reports may be necessary in R2, based on specific customer requirements and further research by Product Management.

<table>
<thead>
<tr>
<th>Section 8.4: Supply/Demand</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-38.</td>
<td>Graphically, view the demand for resources versus the supply of resources over time for a given date range and scale (week or month)</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-39.</td>
<td>Choose to view total demand vs. total supply or unfilled demand vs. available supply.</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-40.</td>
<td>Filter supply by resource pools, roles and skills.</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-42.</td>
<td>Filter demand by prospective projects, active projects and opportunities, owning pool, roles in demand and skills in demand. Implementation issue: Based on organizational views design, unsure which 'pool' this would be filtered by, client, opportunity or project.</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-46.</td>
<td>Provide a view of the “complete” resource schedule which shows time available and time booked, with different highlighting for billable and non-billable</td>
<td>Must have</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 8.6: Customer/Client Profile</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-67.</td>
<td>Provide a view of the total revenue generated from a particular Client. This may initially (until we have DM), be via a simple report listing total project price grouped by completed projects (derive using project dates), active projects and prospective projects.</td>
<td>Nice to have</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 10.3: Supply-Side Revenue Forecasts</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM-86.</td>
<td>Enable the customer to configure the time horizon (in weeks) for the revenue forecast (e.g., 13 weeks)</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-87.</td>
<td>Calculate the resource’s billable hours over the next X weeks. This calculation should net out any overlapping non-billable time commitments, such as vacations. The calculation should also only include project assignments to Active projects (i.e., projects that have been sold).</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-88.</td>
<td>Multiply the resource’s billable hours by the resource’s billing rate to generate a resource-level revenue forecast over the next X weeks.</td>
<td>Must have</td>
</tr>
<tr>
<td>OM-128.</td>
<td>Roll-up these resource forecasts for each resource pool.</td>
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