

The Client: Undisclosed Government Transportation Agency

Business Need:

Our client is a transit authority that includes 6 lines and about 100 stations. Its annual ridership is approximately 200M with a daily ridership average of 650,000.

Contract Lifecycle Management (CLM) is an end-to-end integrated/automated solution designed to manage the entire lifecycle of a contractual agreement. Client required a complete assessment and recommendations regarding the ability of CLM to meet their business requirements. This project was a process and business assessment followed by Implementation of the Oracle/PeopleSoft Strategic Sourcing, Supplier Portal and Supplier Contract Management modules together as an integrated Contract Lifecycle.

Business Processes: Procurement Planning → Sourcing → Contracting → Closeout

PeopleSoft modules: e-Procurement, Purchasing, Strategic Sourcing, Procurement Contracts, E-supplier and Supplier Contract Management

Our Role:

Fit/Gap Analysis:

- ✓ Analyzed client business requirements.
- ✓ Determined level of fit with PeopleSoft Supplier Contracts Management module.
- ✓ Developed level of effort estimate for all items classified as gaps.

Future State Business Process:

- ✓ Conducted work sessions to develop the future state business process.
- ✓ Created process flow diagrams.
- ✓ Created a business process narrative document in support of the process-flow diagrams.

Implementation Plan:

- ✓ Developed an implementation timeline and staffing plan for the implementation of PeopleSoft Strategic Sourcing and Supplier Contract Management.

Recommendations:

- ✓ Developed recommendations based on assessment finding.
- ✓ Presented recommendations to the Executive Steering Committee.

Implementation:

- ✓ Project Leadership and lead Architect

Project Objectives:

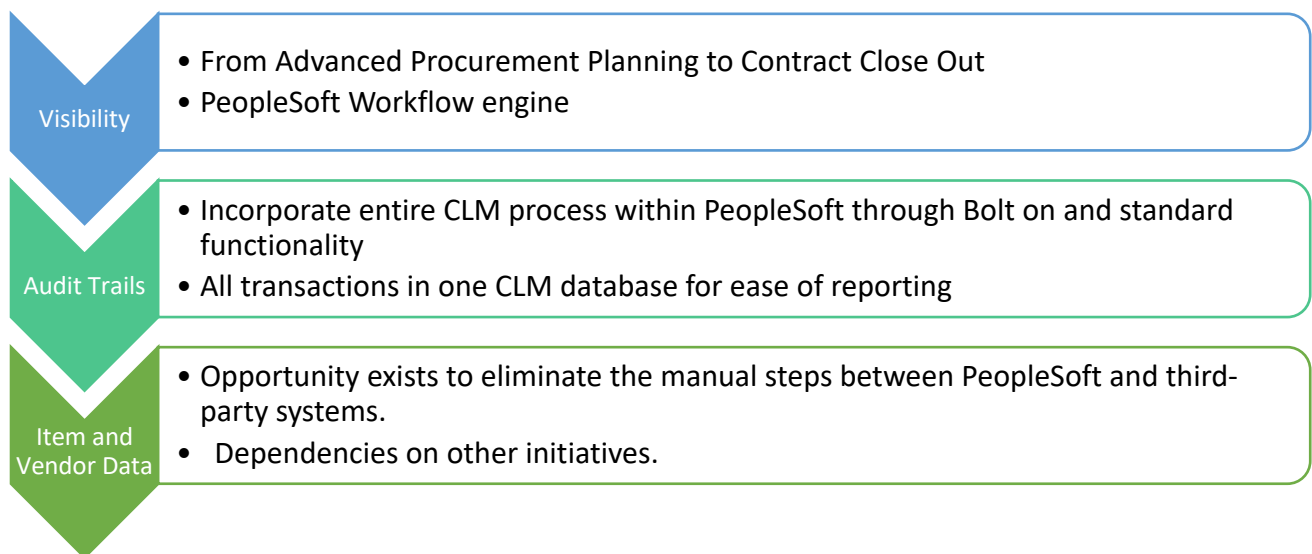
The objective of this initiative was to:

- ✓ Capture CLM data in one system in order to enable transparency of information.
- ✓ Streamline the CLM process leveraging system delivered best practices.
- ✓ Enhance communication and collaboration through the use of a comprehensive CLM system.
- ✓ Use standard procedures and technology to allow stakeholders to better manage the contract lifecycle.
- ✓ Use standard procedures and technology to facilitate a user friendly environment to encourage suppliers to respond to RFQ's/RFP's.
- ✓ Leverage client's existing technology infrastructure.

Our Solution:

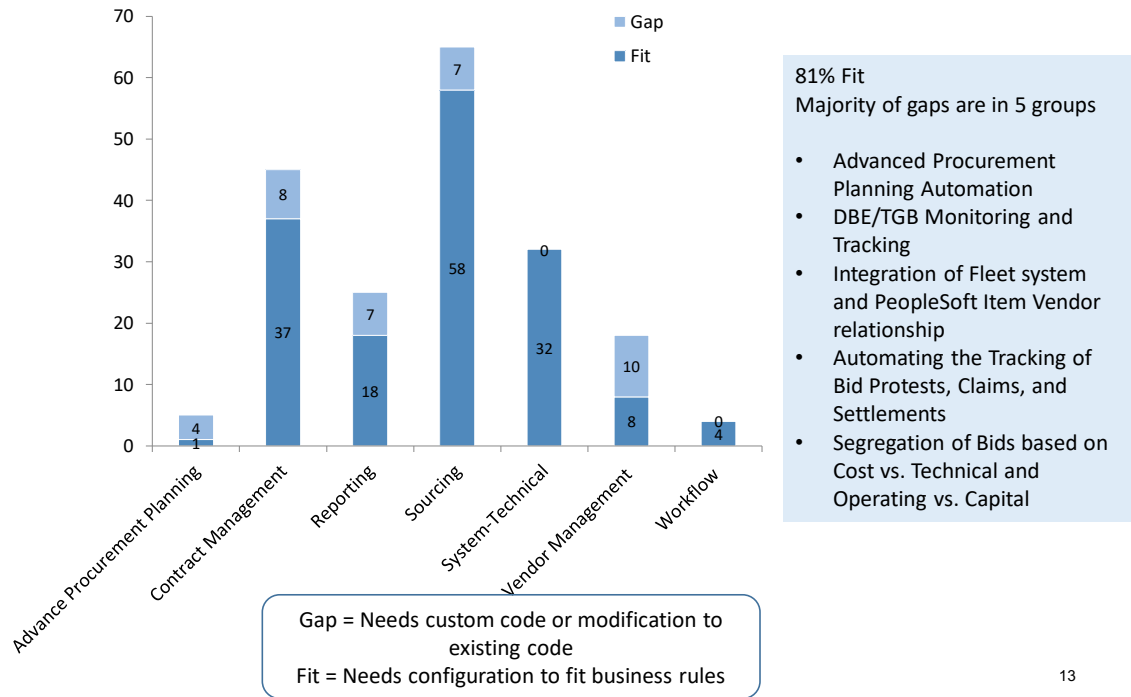
iLynx reviewed current and updated business flows, executed workshop/Interviewed key business users and stakeholders to validate and updated requirements for clarity and completeness, prepared fit-gap report, assign priorities and high level efforts (high to low complexities) and created new business flows incorporating automation, integrations and simplified processes.

Key Observations:



Assessment Findings:

Fit Gap Analysis Results



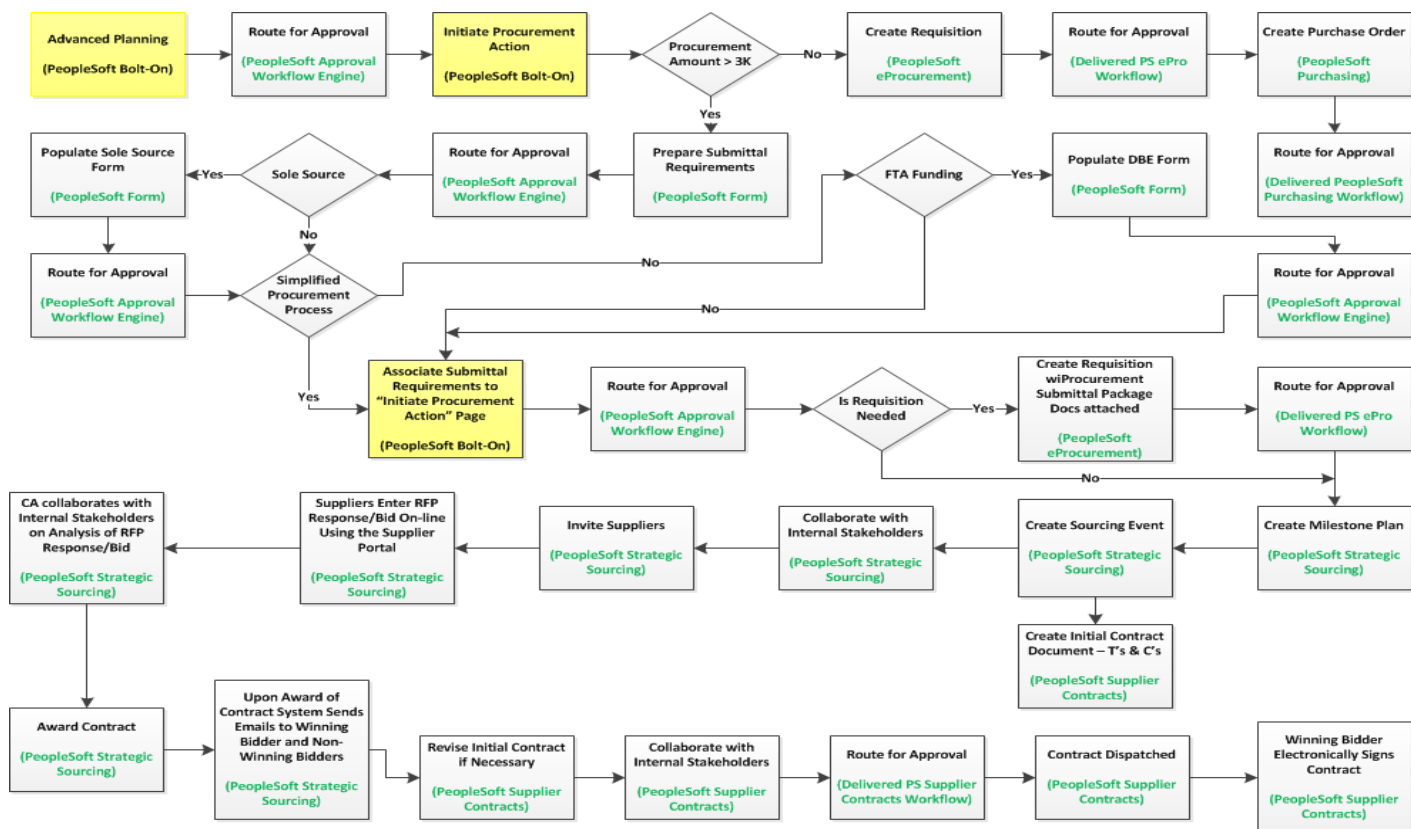
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Recommendations:

- ✓ Reconfigure Strategic Sourcing, eSupplier Connection and the Supplier Portal; Implement Supplier Contract Management.
- ✓ Use PeopleSoft to perform tasks that currently require 3rd party tools
- ✓ Require vendors to interact with client using the Vendor Portal
 - Electronically review opportunities, engage in online bidding, electronic proposal submission, electronically sign contracts
 - Allows client staff to operate more strategically
- ✓ Implement with a strategic perspective
- ✓ Make process changes as part of moving from a paper-based process to an integrated system
 - Don't simply automate a paper-based process
 - Reduce/Eliminate external templates and forms
 - Capture data once and allow system to use data throughout the contract life-cycle
 - Configure system to enforce policies and procedures
 - Configure system to perform audit and quality assurance tasks
- ✓ Use Supplier Contracts Document Authoring Tool

- ✓ System-enforced document version control and audit trail
 - Document Owner concept
 - Check-In/Check Out Control with all MS Word features enabled
 - Clause Protection within document
- ✓ Use the SCM Clause Library and Document Creation features to generate contract documents.
 - Sections
 - Clauses
 - Wizards
 - Rules
 - Bind Variables
 - Configurators
- ✓ Leverage Collaboration features within system
 - Provides controls, routing and comment entry during collaboration
- ✓ Include a Change Management Initiative - Recognize the culture shift

PeopleSoft CLM High-level Process Flow



Results:

An Integrated Oracle/PeopleSoft CLM that offers capability for 1) advanced procurement planning 2) pre-solicitation / procurement initiation 3) sourcing 4) sourcing amendment 5) bidding 6) evaluation/ analysis and award 7) store contract document and 8) contract close out.