JAGGAER Spend Analytics Implementation Overview

JAGGAER Implementation Overview

JAGGAER's implementation services, using proven methodology and best practices, provides the foundation for your implementation.

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Project Approach

The JAGGAER Professional Services team understands that it's not all about the software. By using a collaborative approach and proven methodology with our best in breed solution, our Clients receive maximum return on investment (ROI), reduce risk and achieve end user adoption and overall satisfaction.

The principles of JAGGAER's methodology include:

- A collaborative and transparent Project environment
- An event-based approach to implementation designed to minimize disruption to daily operations
- **World-Class Project Management** throughout the lifecycle of every implementation
- **Established and accelerated training programs** using a blended and layered learning model and approach that provides the right level of training services at the right time

Project Phase 1: Initiate

The Initiate Phase includes Project Initiation, Project Planning, Project Governance and Team Alignment. This phase lays the groundwork for the entire Project. During the Project initiation step, the Client and JAGGAER review the Project objectives, assess readiness, and establish both Project governance and the Project team.

The most important part of Project initiation is confirmation of the Client's business objectives, goals and strategy. These priorities are the metric by which subsequent decisions made during the engagement can be judged. The goal of Project initiation is to ensure that all team members fully understand and buy into these priorities.

As part of the overall Project communication plan, JAGGAER establishes a single point of contact for the Client team to facilitate coordination of actions and plans. The JAGGAER methodology includes a formal communication plan, and acceptance and change control processes, which is reviewed in the kickoff meeting with all participants.

JAGGAER will conduct a project initiation session covering the following:

- Set Project expectations and review scope
- Determine Roles and responsibilities
- Transfer key business information from Client to JAGGAER Project Team
- Review proposed project plan including project contacts, milestones, and timeline
- Review Extract Template and Requirements
- Data Classification Taxonomy Review
- Review Reporting and Analysis creation
- Discuss training included with the project

Project Phase 2: Plan

Following the project initiation session, JAGGAER will conduct a project kick-off covering the following:

- Alignment of scope and objectives with JAGGAER'S implementation methodology
- Review Extract Template and Requirements
- Data Classification Taxonomy Review

- Review Reporting and Analysis creation

During the Plan Phase, JAGGAER and Client project teams deep dive into the requirement details of a Spend Analytics implementation. Working sessions are conducted at a regular cadence during this phase and typically last between 30 and 90 minutes depending on the topics being covered. These sessions are designed to provide iterative product education, discuss status and deliverables, review configurations and requirements, and ultimately drive Project completion.

JAGGAER will work with the Client to produce the data and finalize the taxonomy. Data must be provided to JAGGAER in one of the formats defined below:

Acceptable Formats:

- Delimited extract file written from ERP system/s with all data linkages maintained and validated from client
- All extract files must contain a header row or a header row must be provided within another document
- Text, csv, MS Excel, MS Access, and XML are all acceptable formats for data extracts and lookup tables.
- Data sent as stand-alone lookup/reference tables must maintain unique keys that link back to Spend data

Not Acceptable Formats:

- Data dump tables directly from ERP systems. (This will incur separate charges if JAGGAER has to join data from ERP)
- Invalid extract file (ex: comma separated file w/no enclosures ("xxx") to separate data fields)
- Excel data file with multiple different formats embedded or Excel Report file
- Reports generated directly from ERP system
- PDF, JPEG/scanned document, etc.

Project Phase 3: Execute

Once the data has been loaded into the Spend Analytics audit site, the Execute Phase begins. During this phase, JAGGAER consultants will normalize suppliers and classify data using business rules. JAGGAER will work with the client during configuration review sessions to train the client on the application and continue to refine the business rules based on the requirements defined during the Planning Phase.

During this time, JAGGAER also works with the Client to discuss and customize the Reporting and Analysis of Spend Analytics.

Project Phase 4: Validate

The Validate phase is an opportunity for the Client to review the data classification, reporting customizations, and overall system configurations, as defined during requirements gathering. JAGGAER provides guidance and aids for the Client to conduct the validation. As the client provides feedback on the validation, JAGGAER will refine and update the business rules. Once the validation process is complete and approved by the Client, the Client will move into the Refresh project and prepare to go live.

Project Phase 5: Enable

At this point, JAGGAER will move the data to the production site for the Client to begin their usage of the data for analysis and reporting purposes.

On-going spend data refresh services will be provided by JAGGAER for the duration of the agreement. The Client will prepare a first refresh data set including data from the original data set end date to the beginning of the refresh cycle. JAGGAER will normalize any new suppliers and ensure that the data is classified. Once complete, the Client will audit the refresh data and request changes or refinements to be completed by JAGGAER. This process will continue to keep the data refreshed in the production environment.

Project Roles and Responsibilities: Client

The table below illustrates the typical roles, responsibilities, and levels of effort for the Client's Project team members. The actual effort will vary based on final Project scope and release scheduling.

NOTE: Multiple Project resources can be filled by a single individual where skillset and bandwidth allow.

RESOURCE	RESPONSIBILITIES
Project Management Board	• Participants: Executive sponsor(s), Business Owner, Project Manager • Provide guidance, escalation path and timely resolution for Project issues and key decisions • Solicit organizational support
Project Manager	• Coordinate Client resources and single point of contact for JAGGAER • Coordinate daily Project planning, issue resolution and execution • Status reporting and appropriate escalation to the Executive team
Business and/or Process Owners	• Responsible for all business process and policy issues • Responsible for process redesign and change management

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RESOURCE	RESPONSIBILITIES
IT & Data Extract Resources	• Technical lead for the client's source system(s) and creation of extract spend and supplier data elements • Load data extracts to a Secure FTP site • Initial extract validation of control metrics and address any issues or revisions necessary to meet data requirements • Review finalized data to confirm revisions accurately made prior to go-live
Training/Change Management	• Deploy application and train end users • Change management activities during Project and rollout
Functional Subject Matter Experts	• Knowledge of supplier base, spend patterns, and political entities • Will spend majority of time in the reporting tool disseminating data • Knowledge of overall business process and user buying habits with current suppliers • Represent team/function and get consensus on final taxonomy, source system review, and extract review • Participate in team meetings • Participate in Validation Phase and provide input on classification

Project Roles and Responsibilities: JAGGAER

JAGGAER's Global Professional Services (GPS) team is staffed with a talented group of technology and business professionals who are experts on the JAGGAER solutions, our implementation methodology and toolkit, and most importantly on the processes and challenges faced by our Client base.

NOTE: The table below illustrates the JAGGAER roles typically engaged in an implementation. The number of hours required for each role varies based on the size and complexity of the implementation.

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RESOURCE	RESPONSIBILITIES
Director of Professional Services	• Department and Project profitability • Resource planning, recruiting, and staff development and retention • Pre-sales support, including budget estimates and review of all contractual documents
Professional Services Manager	• Overall Client satisfaction, Client relationship management, and Project oversight • Allocation of all JAGGAER resources • Timely resolution of escalated issues • Directing other team members in the execution of Projects • Providing direction for business and technical process consulting, and solution deployment, as well as cost, schedule, quality, risk, personnel (matrix), communications, , scope and associated with assigned Projects • Participate in the Project Management Board
Project Manager	• Successful implementation, on time and on budget with Client satisfaction • Coordination of all JAGGAER resources • Project planning and Project management • Budget and scope control • Status reporting • Issues management and appropriate escalation • Coordination of testing and training • Single point of contact for Client • Serve on the Project Management Board

RESOURCE	RESPONSIBILITIES
Business Analyst(s)	- Functional leadership through delivering product, industry and business process expertise and guidance on best practices - Gathering and documentation of business requirements and scenarios regarding classifying spend. - Participation in validation efforts and adjustments based on client feedback. - Normalize suppliers, categorize spend
Technical Analyst(s)	- Successful technical implementation of configurable applications for Client engagements (on time and on budget) - Data Deep Dive planning and execution - Custom Reporting Requirements Gathering Session planning and execution - Configuration and validation of the JAGGAER Spend Analytics solution including standard and custom reports - Delivery of administrative and end-user training sessions - Load and troubleshoot data

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