



Create a Bid for a new Consulting project



URL: demo.twenty5.com
User: **DEMO**
Password: **DEMO**
Name: **Samantha Jones**
Role: **Engagement Manager**
Company: **ProServ Corp**
Prospect: **Media Corp**
Opportunity: **SAP upgrade project to SAP S/4 HANA**

This demonstration will walk you through the process where Samantha (Engagement manager) is putting together a proposal for Media Corp and creates an initial resource plan for a bid to upgrade Media Corp's SAP ECC system to SAP S/4 HANA. She will also add some expenses and risks to the proposal.

Benefits to Engagement Manager

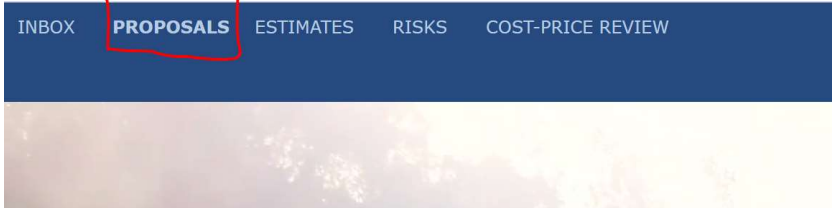
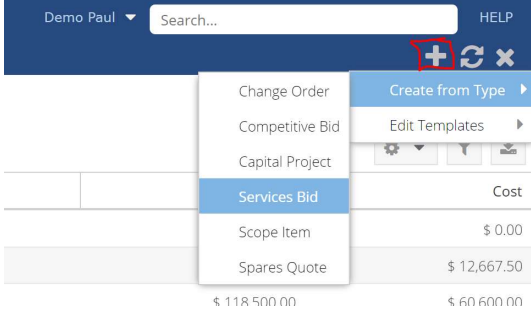
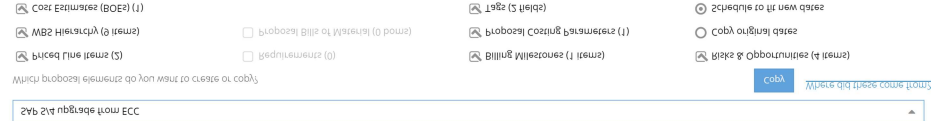
1. Speed and ease of creating a proposal and resource plan
2. Ability to leverage best practices, which ensures driving towards standardization and leveraging past learnings
3. Integration with SAP for resources, rates, and other master data

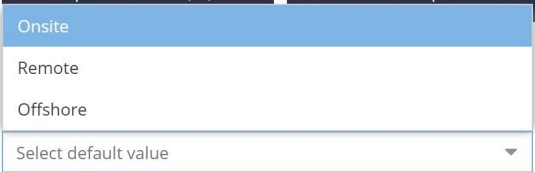
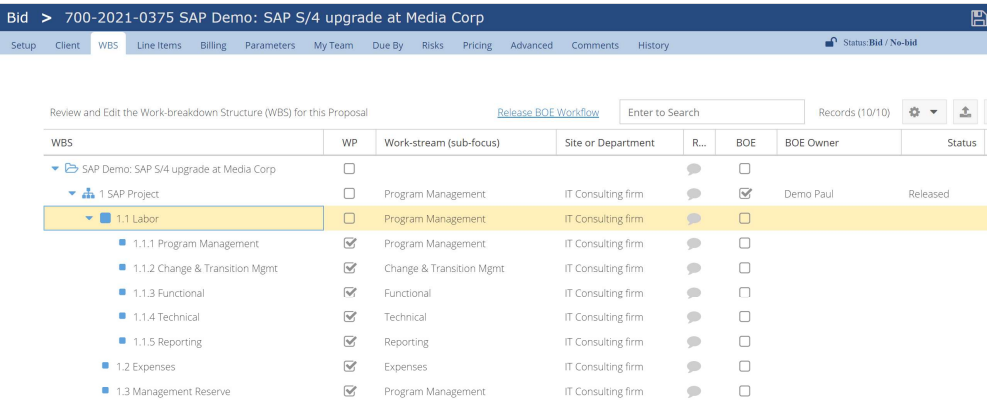
Demo steps

1. Create proposal from best practice template
2. Tweak proposal
3. Create resource plan
4. Add expenses and risks

1. Create Proposal

During this initial set of steps, the proposal is created. A best practice template is leveraged to speed up the creation process, but more importantly to leverage past learnings from how an SAP ECC upgrade project is setup and staffed. The proposal is then adjusted for the specific needs of this project.

#	Action	Talking Points	Screenshots / Test Data
1.	Open proposal app	<ul style="list-style-type: none"> Multiple apps: Proposals, Estimates, Risks, etc Role-based access and security Configurable menus 	
2.	View list of proposals	<ul style="list-style-type: none"> Samantha's role can view past and current proposals within her company She can search, filter or view/edit existing proposals 	
3.	Create proposal	<ul style="list-style-type: none"> Proposal types are configurable and drive different behaviors, such as: <ul style="list-style-type: none"> Workflow/response plan Proposal numbering Complexity (e.g. phases) Risk policy Screen layout Standard tags 	 <ul style="list-style-type: none"> Hover over the '+' and pick 'Services Bid' under the 'Create from Type' menu
4.	Add basic proposal data	<ul style="list-style-type: none"> Add basic information 	<ul style="list-style-type: none"> Proposal title: <Prospect> Demo: SAP S/4 upgrade at Media Corp Target confidence: ROM Period of performance: 01/01/21 to 12/31/21 Primary performing business unit: ProServ Corp Other sites: Offshore resources
5.	Copy best practice template	<ul style="list-style-type: none"> Re-use based on prior proposal or best practice templates Proposals can be built using multiple historical proposals and/or templates 	 <ul style="list-style-type: none"> Select 'Copy template' Search for "upgrade" and select "SAP S/4 upgrade from ECC" Leave all the checkboxes and hit 'Copy' button

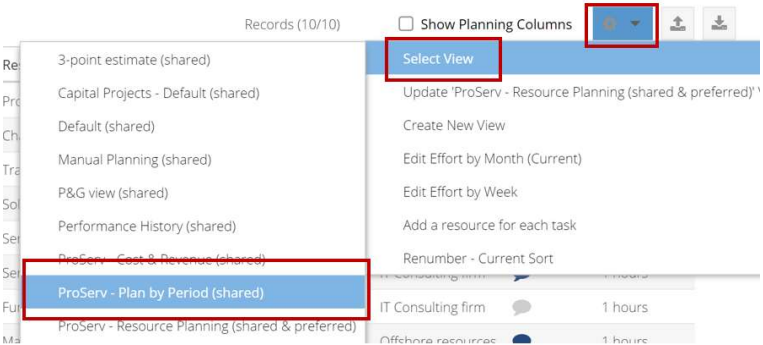

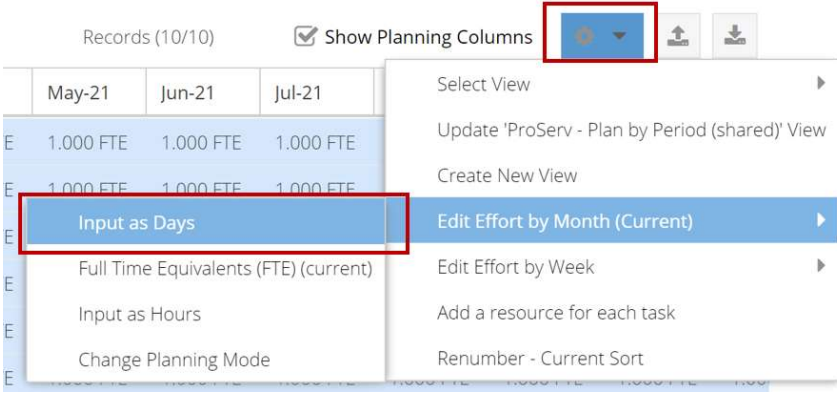
6. Tags	<ul style="list-style-type: none"> Tags add new dimensions to your cost model Standard tags (by proposal type) and proposal specific tags This example uses Onsite, Offsite and Remote as a standard tag, which is later used for calculating travel expenses based on amount of onsite labor 	 <ul style="list-style-type: none"> No need to do anything other than show the list of potential values. The actual tag assignment happens during resource planning per resource
7. Add client information	<ul style="list-style-type: none"> Exchange rates and conversions are handled across the system for <ul style="list-style-type: none"> Company currency Customer currency Source currency (cost incurred in other currencies, e.g. using international resources) 	<ul style="list-style-type: none"> Go to the 'Client' tab Contract type: Firm Fixed Price (FFP) Customer name: Media Corp
8. View WBS structure & Release estimate	<ul style="list-style-type: none"> The WBS structure can be modified for any proposal and details such as Department, Dates, etc can be changed Releasing workflow trigger the Estimate owner to receive an email and start creating the resource plan 	 <ul style="list-style-type: none"> Go to the 'WBS' tab Leave WBS structure as is Release Estimate by selecting 'Release BOE Workflow'

9.	Review line item	<ul style="list-style-type: none">Line items are the customer facing view of the proposal, which would typically turn into line items on your contract/sales order.Line items are linked to WBS elements for connecting the cost to the deliverables	<div><div>Bid > 700-2021-0375 SAP Demo: SAP S/4 upgrade at Media Corp</div><div>SetupClientWBSLine ItemsBillingParametersMy TeamDue ByRisksPricingAdvancedCommentsHistory</div><div>Status: Bid / No-bid</div><div>List below the items, product or services your proposal is for, organized how the client wants to see it.</div><div>Records (2/2)</div><table><thead><tr><th></th><th>Item</th><th>Type</th><th>Description</th><th>Contract Type</th><th>Qty of Item</th><th>Cost (Customer c...</th><th>Revenue (Custo...</th><th>WBS</th><th>R...</th></tr></thead><tbody><tr><td>+ -</td><td>1</td><td>Proposal</td><td>Labor</td><td>Firm Fixed Price (FFP)</td><td>1.00 ea</td><td>\$ 0.00</td><td>\$ 0.00</td><td>1.1 Labor</td><td></td></tr><tr><td>+ -</td><td>2</td><td>Expenses</td><td>Expenses</td><td>Time & Materials (TM)</td><td>1.00 ea</td><td>\$ 0.00</td><td>\$ 0.00</td><td>1.2 Expenses</td><td></td></tr></tbody></table></div> <ul style="list-style-type: none">Go to the 'Line Items' tabLeave WBS structure as isRelease Estimate by selecting		Item	Type	Description	Contract Type	Qty of Item	Cost (Customer c...	Revenue (Custo...	WBS	R...	+ -	1	Proposal	Labor	Firm Fixed Price (FFP)	1.00 ea	\$ 0.00	\$ 0.00	1.1 Labor		+ -	2	Expenses	Expenses	Time & Materials (TM)	1.00 ea	\$ 0.00	\$ 0.00	1.2 Expenses	
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10	Review risk register	<ul style="list-style-type: none">The risk register came from the proposal template of 'typical' risks associated with this type of projectRisks for this proposal will get identified and assessed throughout the proposal process and is critical to understand range our outcomes	<ul style="list-style-type: none">Go to the 'Risks' tabLeave Risks as is																														

2. Create Resource plan

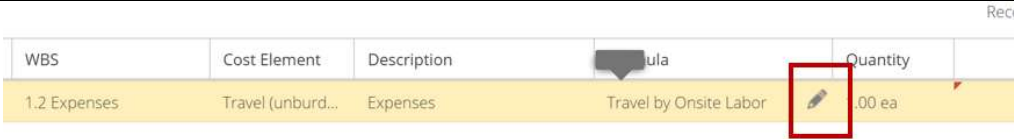
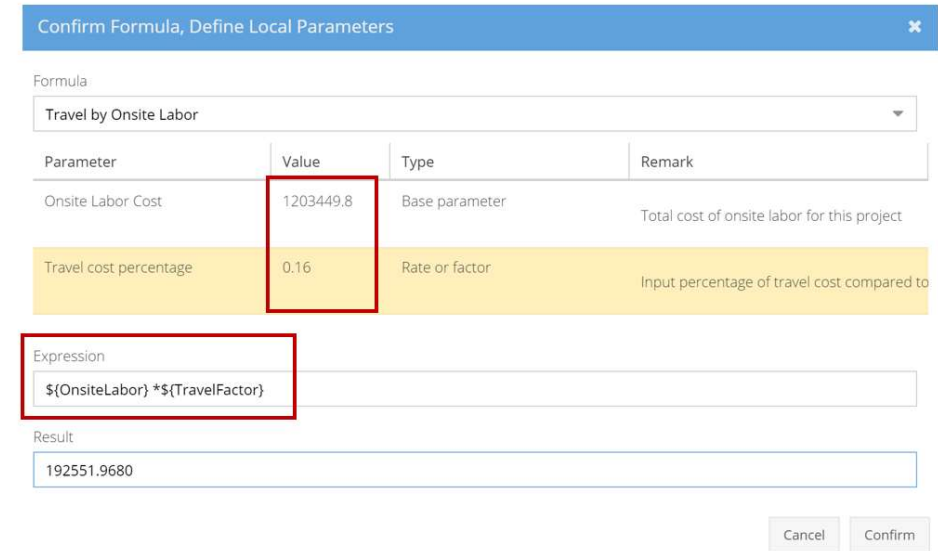
Now it is time to add the labor resource plan. Labor resources can be planned in a number of different ways, such as calculating labor based on performance history or using formulas. In this demonstration, we show how labor can be planned using an ‘Excel-like’ resource grid.

#	Action	Talking Points	Screenshots / Test data																																																																																																														
1.	Open estimate	<ul style="list-style-type: none">The estimate can be opened from 3 places<ul style="list-style-type: none">Workflow emailWBS gear menu in the proposalSearch screen in estimate app	<div><div>WBS</div><div>Work-stream (sub-focus)</div><div>Si</div><div><div>SAP Demo: SAP S/4 upgrade at Media Corp</div><div><div>1 SAP Project</div><div><div><div></div></div><div><div>Program Management</div><div>IT</div></div><div><div>Expand/Collapse</div><div>Add WBS node</div><div>Add WBS sub-node</div><div>Copy WBS</div><div>Delete WBS</div><div>Import Below</div><div>Re-number WBS Below</div><div>Open Basis of Estimate</div></div></div></div></div><div><ul style="list-style-type: none">Go to the 'WBS' tabSelect Gear menu by hovering over "I. SAP Project" WBSSelect 'Open Basis of Estimate', a new browser tab will open</div></div>																																																																																																														
2.	Add resources	<ul style="list-style-type: none">Modify the resources needed for the project	<table><tr><th></th><th>Onsite</th><th></th><th>Sequen...</th><th>WBS</th><th>Resource</th><th>Description</th><th>Dept</th><th>Remarks</th><th>Effort</th></tr><tr><td>1</td><td>Onsite</td><td><div><div></div><div></div></div></td><td>1</td><td>1.1.1 Program Management</td><td>Project Manager</td><td>Project Manager</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>2</td><td>Remote</td><td><div><div></div><div></div></div></td><td>2</td><td>1.1.2 Change & Transition Mgmt</td><td>Change Senior Consulta...</td><td>Change lead</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>3</td><td>Remote</td><td><div><div></div><div></div></div></td><td>3</td><td>1.1.2 Change & Transition Mgmt</td><td>Training Consultant</td><td>Training</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>4</td><td>Onsite</td><td><div><div></div><div></div></div></td><td>4</td><td>1.1.3 Functional</td><td>Solution Architect</td><td>Solution Architect</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>5</td><td>Onsite</td><td><div><div></div><div></div></div></td><td>5</td><td>1.1.3 Functional</td><td>Senior Functional Cons...</td><td>Workstream Lead - FICO</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>6</td><td>Onsite</td><td><div><div></div><div></div></div></td><td>5</td><td>1.1.3 Functional</td><td>Senior Functional Cons...</td><td>Workstream Lead - MM</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>7</td><td>Onsite</td><td><div><div></div><div></div></div></td><td>6</td><td>1.1.3 Functional</td><td>Functional Consultant</td><td>Functional Consultant</td><td>IT Consulting firm</td><td><div></div></td><td>1 hours</td></tr><tr><td>8</td><td>Offshore</td><td><div><div></div><div></div></div></td><td>7</td><td>1.1.4 Technical</td><td>Managing Technical Con...</td><td>Development lead</td><td>Offshore resources</td><td><div></div></td><td>1 hours</td></tr><tr><td>9</td><td>Offshore</td><td><div><div></div><div></div></div></td><td>8</td><td>1.1.4 Technical</td><td>Technical Consultant</td><td>Developer</td><td>Offshore resources</td><td><div></div></td><td>1 hours</td></tr><tr><td>10</td><td>Offshore</td><td><div><div></div><div></div></div></td><td>9</td><td>1.1.5 Reporting</td><td>Technical Consultant</td><td>Reporting Developer</td><td>Offshore resources</td><td><div></div></td><td>1 hours</td></tr></table> <div><ul style="list-style-type: none">Hit 'Hide summary info' to make more space for resourcesCopy 'Workstream Lead' role and make it into two workstream leadsAdjust the Description to e.g. Workstream Lead FICO and Workstream Lead MM</div>		Onsite		Sequen...	WBS	Resource	Description	Dept	Remarks	Effort	1	Onsite	<div><div></div><div></div></div>	1	1.1.1 Program Management	Project Manager	Project Manager	IT Consulting firm	<div></div>	1 hours	2	Remote	<div><div></div><div></div></div>	2	1.1.2 Change & Transition Mgmt	Change Senior Consulta...	Change lead	IT Consulting firm	<div></div>	1 hours	3	Remote	<div><div></div><div></div></div>	3	1.1.2 Change & Transition Mgmt	Training Consultant	Training	IT Consulting firm	<div></div>	1 hours	4	Onsite	<div><div></div><div></div></div>	4	1.1.3 Functional	Solution Architect	Solution Architect	IT Consulting firm	<div></div>	1 hours	5	Onsite	<div><div></div><div></div></div>	5	1.1.3 Functional	Senior Functional Cons...	Workstream Lead - FICO	IT Consulting firm	<div></div>	1 hours	6	Onsite	<div><div></div><div></div></div>	5	1.1.3 Functional	Senior Functional Cons...	Workstream Lead - MM	IT Consulting firm	<div></div>	1 hours	7	Onsite	<div><div></div><div></div></div>	6	1.1.3 Functional	Functional Consultant	Functional Consultant	IT Consulting firm	<div></div>	1 hours	8	Offshore	<div><div></div><div></div></div>	7	1.1.4 Technical	Managing Technical Con...	Development lead	Offshore resources	<div></div>	1 hours	9	Offshore	<div><div></div><div></div></div>	8	1.1.4 Technical	Technical Consultant	Developer	Offshore resources	<div></div>	1 hours	10	Offshore	<div><div></div><div></div></div>	9	1.1.5 Reporting	Technical Consultant	Reporting Developer	Offshore resources	<div></div>	1 hours
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3a	Create resource plan	<ul style="list-style-type: none"> This best practice template is set to plan resources based on FTE's per month, but you can change planning mode between weekly/monthly and also between FTE, days or hours 	 <ul style="list-style-type: none"> Hit 'Hide summary info' to make more space for resources
3b	Create resource plan	<ul style="list-style-type: none"> Copy/paste works within app and also with Excel Drag down (blue square) works NOTE: Drag left/right DOES NOT work 	 <ul style="list-style-type: none"> Hit 'Show Planning Columns' to bring up the planning grid Add resource plan as FTE's per month
4	Convert to planning in 'Days'	<ul style="list-style-type: none"> Twenty5 converts FTE to days based on the actual calendar A configurable Work Calendar for each business unit provides the ability to define working add non-working days (vacations/holidays) A configurable Work Schedule for each business unit provides the ability to define number of working hours per day to adjust for a 40 hr work week (typical in the US) versus e.g. a 37.5 hr work week in the UK 	 <ul style="list-style-type: none"> Change planning mode to Days per Month

3. Add Expenses

Now it is time to add the labor resource plan. Labor resources can be planned in a number of different ways, such as calculating labor based on performance history or using formulas. In this demonstration, we show how labor can be planned using an 'Excel-like' resource grid.

#	Action	Talking Points	Screenshots / Test data
1.	Add Travel expense	<ul style="list-style-type: none"> Travel expenses can be calculated in lots of ways, in this example it is calculated using a formula, which applies a 16% factor on top of all onsite labor costs Formulas can be used throughout the application for calculating any estimate 	<div>  </div> <ul style="list-style-type: none"> Select 'Other Non-labor expenses' tab Hover over formula column and click on pencil <div>  </div> <ul style="list-style-type: none"> Review formula, parameters and values and hit 'Confirm' Save estimate

2.

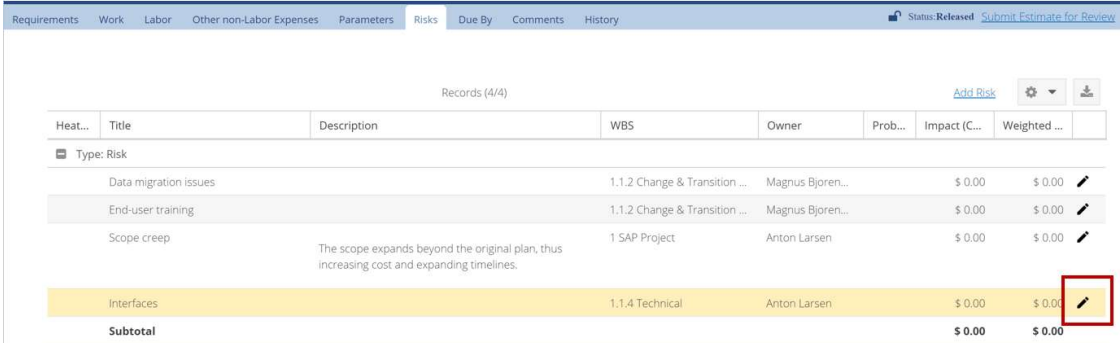
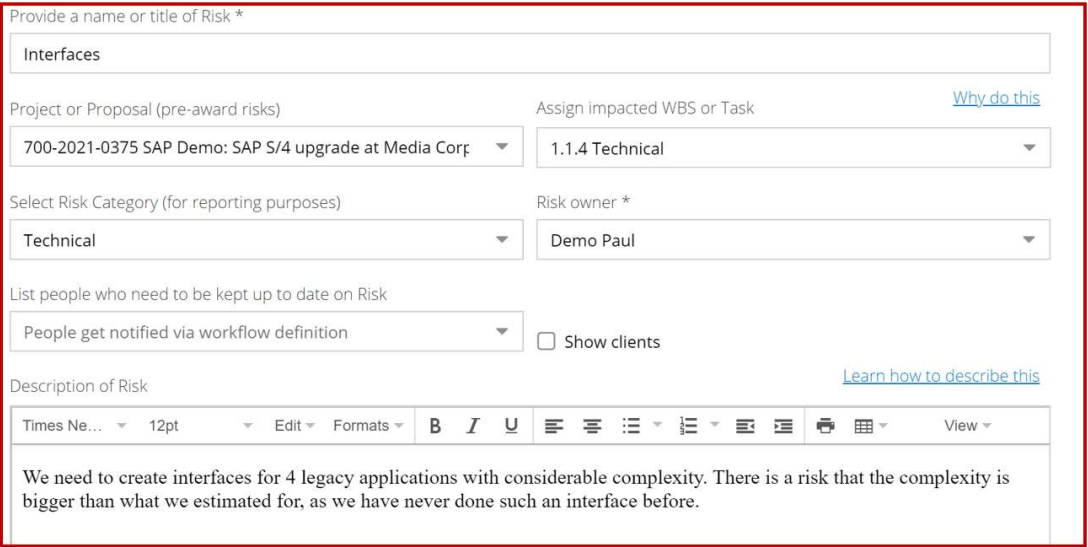
Add Other expenses

- Any other type of expenses can be added, whether they are hardware, services, finance cost, etc.
- The cost element determine how the costs are being burdened

Type	WBS	Cost Element	Description	Formula	Quantity	Unit Cost	Total Cost
+	Travel & Exp...	1.2 Expenses	Travel (unburd... Expenses	Travel by Onsite Labor	1.00 ea	\$ 192,551.97/ea	\$ 192,551.97
+	Other non-L...	1.2 Expenses	Legal Fees	Legal expenses	1.00 ea	\$ 12,000.00/ea	\$ 12,000.00

4. Add Risk

The last step for Samantha is to add some risk associated with the delivery of this project. Risks are both identified, assessed in terms of impact and a mitigation plan can be created and tracked to reduce the impact of the risk.

#	Action	Talking Points	Screenshots / Test data
3.	Open Risk	<ul style="list-style-type: none"> 	 <ul style="list-style-type: none"> • Select 'Risks' tab • Click pencil on the 'Interfaces' risk
4.	Create Risk	<ul style="list-style-type: none"> • Categorize and describe the risk to capture the essence of it for other people to also be able to help assess the impact 	 <ul style="list-style-type: none"> • Add Risk Title, Impacted WBS, Risk Category, Risk Owner & Risk Description

5. Assess Impact of Risk

- Weighted impact is the probability x cost impact and what will get added to your cost model

Setup

Milestones

Assessment

Response

History

Status: Initial

When will this risk occur

21/4/21

21/4/21

What is the probability of this Risk occurring?

Rare (10%)

Unlikely (30%)

Possible (50%)

Likely (70%)

Almost certain (90%)

Impact

Enter cost, schedule in days and performance impact below or click pencil [Details e.g. resources or other costs](#)

Resulting Cost Impact

Schedule Impact (in days on WBS)

Quality/Performance Impact

Overall Impact

\$ 200,000.00

Moderate

Scoring

	IMPACT				
Probability	Minimal	Minor	Moderate	Significant	Critical
Almost certain (90%)					
Likely (70%)					
Possible (50%)			X		
Unlikely (30%)					
Rare (10%)					

Weighted Impact

\$100,000.00

[How is this calculated](#)

- Select 'Assessment' tab
- Set probability and cost impact
- Save

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 BETTER BUSINESS INSIGHTS

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