

FullCost Intensive Training

train your project team

Prior to First Workshop

HOMEWORK: Procurement and preparation

- Finalize procurement
- Finalize license
- Appoint project team members
- Order materials from NDMA
- Create folder on a shared drive, limit access to project team and leadership team

HOMEWORK: Data gathering

- Organization chart, your organization (through tier two, with cost centers if relevant)
- Organization chart, Institution (through level at which you do budget reviews)
- Types of staff (up to 7) and benefits burdens for each
- List of general-ledger expense summary codes (up to 24)
- Typical vacation and personal-leave entitlements
- Work to date on service portfolio and catalog

Day 1

AM

- Orientation

PM

- Masterfile configuration: Create module, Priorities, Overview tab
- Masterfile configuration: Staffing Categories
- Masterfile configuration: Clients, Consortia
- Masterfile configuration: Checkbooks
- Masterfile configuration: Contract Bundles, Initiatives, Sales Types, Product Sets, Service Portfolios, Drivers, Towers, Currencies
- Masterfile configuration: Expense Code columns
- Diagnose organization chart and list Budget Units (Budget Units tab), Cost Centers, Attributes
- Create Budget Units
- Propagating configuration data

Day 2

AM

- Catalogs, Units
- List of major applications suites (1-2 pages) with asset-owners for each
- List of major infrastructure assets (1-2 pages) with asset-owners for each

PM

- Deliverables Q1-10, 11, 12
- Primes-sub (Deliverables Verify)

Day 3

AM

- People
- Staffing Plan
- Billable Hours
- Max Growth Caps, Headroom report

PM

- External costs)
- Cost pools, reimbursables

Day 4

AM

- Internal sales, cost pools, reimbursables
- Internal circularity
- Overhead sales

PM

- Revenues
- Data cleanup
- Tuning

Day 5

AM

- Reports

PM

- Commands
- To-do list

OPTIONAL, after you have set up your model:

Day 6-10

- Data cleanup
- Reports