

# CONTRACT-BASED PROGRAM MANAGER

## OBJECTIVE

Successful execution of contract-based programs means managing volumes of information to efficiently meet all contractual obligations. Contract-based Program Manager integrates all critical data and program information into one consistent whole to make it more understandable and provides a permanent reference and program “memory” to inform new team members.

## OVERVIEW

Tracking, reporting and communicating information involves teams of people across multiple functions and organizations. Programs succeed or fail on their ability to communicate very reliably with all the team members over long periods of time. **Contract-based Program Manager** utilizes the **3DEXPERIENCE®** platform to make product content available to users more securely. Through project pipeline dashboards, **Contract-based Program Manager** provides real-time visibility into a project’s status in terms of schedule, resources, costs, and benefits. Users can create and access **3DEXPERIENCE®** data from the most popular Microsoft applications, including Word®, Excel®, PowerPoint®, Outlook®, Project, Windows Explorer, and Windows Desktop Search.

**Contract-based Program Manager** includes capabilities to support a single environment with a consistent look-and-feel and enterprise security for these functional disciplines:

- Contracts Management
- Sub-contracts Management
- Data Management
- Program Management
- Program Planning & Control (PP&C)
- System Engineering

Performance-to-contract is greatly improved when all contract requirements are visible to the entire team. Using one system to bring together the core processes of these functional disciplines provides the ability to improve overall performance of program execution and delivery-to-contract. **Contract-based Program Manager** enables users to:

- Capture contracts and their associated work-breakdown elements in line-item detail to ensure complete assignment, scheduling and proper execution.
- Work-breakdown elements reference the scheduled tasks required to complete the work assigned.
- Link projects with critical milestones and deliverables to the contracts and baseline product architectures.
- Link hardware and software deliverables to schedule tasks.
- Capture contract requirements for data delivery with the Contract Data Requirements List (CDRL) and Subcontract Data Requirements List (SDRL).
- Generate and schedule submittal tasks and link actual data deliverables documents for assignment and future completion.

In order to align downstream product development with the contract requirements, the complimentary **Requirement Manager** should be used to capture, share and manage technical requirements.

## HIGHLIGHTS

### Proposal Management

**Contract-based Program Manager** includes capabilities to manage responses to proposals more effectively. By implementing winning proposal project processes, reusing previous proposal and program artifacts, and working more efficiently in a shared environment, companies can improve win/loss ratios while lowering proposal effort, maintaining tight proposal schedules and complying with CMMI process repeatability requirements. Common WBS capabilities allow the company to accumulate experience from historical contracts and projects to assist in preparing estimates for new ones.

### Contracts Management

**Contract-based Program Manager** includes capabilities to manage and store contractual correspondence and documentation. Program managers can capture and decompose product requirements, contract line items (CLINs), and Work Breakdown Structure Elements (WBSE) into manageable, traceable and auditable entities. Responsibilities for the execution and contract closure of program plans are assigned through the Requirements Allocation Matrix (RAM). Formal change and approval processes are provided to enforce Contract Modifications and Contract Change Orders. Tools include Contract Change Proposals, Rough Order of Magnitude (ROM) estimates and Preliminary Impact Analyses (PIA) for evaluation of customer proposed contract changes. Contract forms are provided for contract authoring and SF-1411 (Contract Pricing Proposal Cover Sheet) certification of cost is also supported. The structure of contracts supports the Uniform Contract Format (UCF) and contract templates assist in properly organizing enterprise or customer contract artifacts.

### Subcontracts Management

**Contract-based Program Manager** includes capabilities to manage contracts and subcontracts as programs with automatic synchronization of contractual milestones in master projects. Subcontractors' schedules and deliverables can be assigned and their performance to schedule can be tracked.

### Data Management

**Contract-based Program Manager** includes capabilities to manage CDRL and SDRL specifications and manually or automatically schedule multiple data submittals based on milestone dates and frequency. DRL approval processes can be managed. Data Item Descriptions (DIDs) are linked as individual items to contracts to permit classification and "where-used" lookup.

### Program Planning & Control (PP&C)

**Contract-based Program Manager** can plan and monitor the execution of major programs through Programs including related Projects including the schedule task breakdowns. Schedules can be managed in the application user interface or through imports of XML output from MS Project.

## Key Benefits:

- Improve proposal performance in terms of needed resources, response schedules and proposal win/loss ratio.
- Secure program award fees and profits with reliable contract delivery performance.
- Increase customer satisfaction as the result of responsive and reliable issue and correspondence management.
- Reduce or eliminate penalties and late fees through better management of contract work items, schedules, deliverables and all adjustments and changes.
- Eliminate failed contract audits through the use of repeatable and secure storage, submittal and contract verification processes.
- Optimize staffing plans with real-time utilization reports to assess availability of key skills across all projects.
- Drive phase-based decision making process using process templates with predefined phases, gates and milestones.
- Improve execution and oversight of complex product development activities by decomposing projects into smaller manageable projects with visibility to sub-project dependencies.
- Facilitate access to processes and data within a secure environment.
- Coordinate and collaborate on the planning and execution of projects in real-time.
- Manage complex collaborative projects involving internal and external teams of customers, suppliers and partners.

## Extended Enterprise

Secure access is provided using standard Internet tools for including customer, supplier and partner personnel into relevant aspects of defining the product architecture and executing projects. Program management and product architecture data is accessed with a Web browser or via Microsoft Windows applications such as Explorer, Office, etc.

Support for customer notification and approval is provided by delivery folders for customers to receive contractual data submittals. Customers also have the ability to review and approve deliverables and download deliverable content. Flexibility is provided through configurable dashboards that display information such as the status of a program's key performance indicators (KPIs).

Configurable supplier access is available as well as configurable access to subcontract data (Statements of Work, specifications, etc.). Collaboration occurs between the subcontract management team and supplier team members, allowing subcontract risks, issues and opportunities to be tracked. Supplier team members also are able to record supplier schedule and deliverable status.

## Schedule Change Management

**Contract-based Program Manager** can define project schedules and require that any proposed changes to these baselines must obtain program/project manager approval for incorporation. Alternative tasks/schedules can be defined to assess the impact to a baseline schedule. In addition, the ability to “Lock/Unlock Schedules” in support of “End of Period” activities allows the program schedule team to control changes in the schedule while formal contract progress reviews occur.

## Business Goals

**Contract-based Program Manager** can define a business goal hierarchy to help identify which projects should be approved and funded based on how they impact strategy.

## Resource Management

**Contract-based Program Manager** is able to monitor resources across programs and business units to track, plan and fulfill the total demands of their organization. Projects of various kinds (e.g. proposals, risk mitigation, departmental) establish the demand for resources by organization or skill sets. Formal request/commit processes ensure that demand is met or unmet in a very visible and transparent way. Skill hierarchies and resource competencies and experience allow optimal use of resources. In addition, standard real-time reports of resource demand and utilization improve the organization’s ability to make the right decisions about allocating resources, which improves overall productivity.

## Project Dashboards

**Contract-based Program Manager** can create and use dashboards providing a high-level graphical view of project status by phase, risk, quality, issues, assessments, costs, and benefits. The dashboards can provide visibility into enterprise metrics such as Program Performance, Organizational and Integrated Program Team (IPT) Performance and Performance of Operating Units. Alternative views of program status are provided through Executive Dashboards, Proposal Dashboards, Departmental Dashboards and Product Line Dashboards.

## Program Risk, Issue and Opportunity Management

**Contract-based Program Manager** can view the status, mitigation, and execution of Risk, Issues, and Opportunities in a Program’s context and related to the effort, schedule and deliverable items. Risk-reduction projects permit detailed tracking of risk mitigation efforts which can be precisely tied into resource planning and master-schedule roll-ups. Embedded issue tracking and project health assessments help identify new risks as early as possible. During the analysis process, risks can be assessed and quantified in multiple dimensions. These dimension values are used to determine each risk priority and clarify which project risks need mitigation to help minimize these potential negative impacts. Similarly, Opportunities can be identified and tracked and plans can be defined and managed to capture the Opportunity.

## Context Templates

**Contract-based Program Manager** can develop process standards and enhance predictability by driving repetitive project execution throughout the organization with templates for Contract, Projects and Routes for their organizations. Project templates consist of schedule elements defined by responsible roles, folder structures, questionnaires, document templates, and bookmarks.

## Phase Gate Management

**Contract-based Program Manager** can manage appropriate program milestones (such as subsystem PDR or CDR) with a phase gate review process, which includes criteria for making decisions to go forward with a project. Capabilities include an ability to schedule the gate review meeting date and capture the gate meeting details, such as list of attendees, topics and artifacts, and final decisions.

## Task Deliverables

As tasks are assigned and being worked, task deliverables should be associated and managed in the context of the task. As a task deliverable progresses through its lifecycle, the system automatically updates the task status. At any time, the deliverables can be categorized into project folders for additional access controls and increased visibility. To keep task deliverables on schedule, project leaders can configure automatic reminders of upcoming or late tasks that project members will receive in their company email.

## Engineering Project Management

For companies using Collaborative Innovation, it is possible to monitor design activity and navigate all project information from CATIA® using Contract-based Program Manager. This allows access to outputs from design on the corresponding project tasks. **Contract-based Program Manager** and Collaborative Innovation both run on the same technology platform. Therefore, users can search for and associate engineering data as deliverables to assigned project tasks easily. Engineering tasks can be created as part of **Contract-based Program Manager** Work Breakdown Structure (WBS) and are accessible immediately to the designer within his/her design environment.

## Product Line Management

**Contract-based Program Manager** includes the ability to organize and manage a portfolio of products and the planning and introduction of future products by executing development projects. Product lines and model hierarchies organize a company’s family of products. Model hierarchies represent specific products available to customers. Product managers can associate product releases with development projects and organize them into portfolios. A portfolio provides visibility into a product line’s road map, product release dependencies and a real time status of strategic project milestones to share with other organizations.

## Project Content

All project content and deliverables are managed securely and stored within folder and subfolder structures. Project owners and project leads establish security on a per-project basis by setting individual access rights. Within a project, each folder and file maintains additional levels of security. Team members can establish a single environment where all project information—not just documents—can be managed and shared. Members can subscribe to document events for immediate notification as changes and additions occur. Reports can be executed to provide a consolidated list of project-related content from either the work breakdown structure or from the folder structure.

## Collaboration & Approvals

Users can benefit from a wide range of capabilities for global enterprise collaboration. Those capabilities include the ability to manage and organize shared documents and structured product data. They also enable the creation of digital workspaces for virtual teams to work together. Users can easily raise issues, organize meetings and track decisions while any object lifecycle modifications can be formally approved using routes defined by end-users or, to simplify and facilitate a repeatable approval process, standard route templates.

## Microsoft Integration

Users can create and access **3DEXPERIENCE** data from the most popular Microsoft applications: Word®, Excel®, PowerPoint®, Outlook®, Windows Explorer, and Windows Desktop Search. This capability enables enterprise-level collaboration while not disrupting the established productivity of end-users. With product content being managed in **3DEXPERIENCE** rather than on users' PCs, organizations are able to create, manage and review product content more securely.

## Using Microsoft Project for Schedule Creation

In addition to the use of schedule templates and manual schedule creation, schedules can be created using Microsoft Project. The schedule data can then be imported into the **3DEXPERIENCE** platform to execute the tasks and their associated deliverables.

Repeated synchronization between the tools is possible, allowing schedule authors to continue to work with MS Project while the project members perform their tasks in the **3DEXPERIENCE** platform. The synchronization can also accommodate a mixed mode of operation in which some tasks within a given project are managed in **3DEXPERIENCE** platform and others in MS Project.

These capabilities allow the **3DEXPERIENCE** platform to consolidate the work of many project schedule authors, each of them contributing schedules and, possibly, status to the work of a program. In addition, a gradual transition of schedule authoring and management can occur from the current state of exclusive use of MS Project, through partial use and ultimately exclusive adoption of the **3DEXPERIENCE** platform for this purpose.

In addition, users can:

- Promote company standards with document templates stored in **3DEXPERIENCE** platform and accessed with Microsoft Office applications
- Populate data from **3DEXPERIENCE** platform into MS Word tables
- Direct searches into the **3DEXPERIENCE** platform database to find product information
- Subscribe to document modification events
- Route documents for review, comment and approval
- Record key decisions with saved email threads

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