

PHASE 3 SUMMARY

Ohio Business Gateway Modernization Project

April 2016

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PHASE 3 FINAL DELIVERABLE SUMMARY

	Section	Value	Page
	Phase 3 Activities	Summarizes the work threads and key activities from Phase 3 of the Gateway Modernization Project	3
Technology	Business Value Accelerators	Released 4 specific, high impact BVAs to the business community in the form of enhancements to the current system and user-facing guidance	5
	Design Readiness	Documented application flows, data dictionaries and user stories specifically for 2 selected transactions, preparing for build-out of the new platform	17
Business and Integrated	Change & Communication	Delivery of communications (internal and external) to keep parties informed and up-to-speed on the modernization	19
	Program Execution Readiness & Leadership Support	Creation of a standardized PMO program and onboarding plan for future development partners	21

Detailed documentation was produced to provide support for each of the Threads

PHASE 3 ACTIVITIES

KEY ACTIVITIES COMPLETED ACROSS PROJECT WORK THREADS

Technology

- Support build and development of Business Value Accelerators (BVAs)
- Inventory application flows, data dictionaries and user stories for specific transactions
- Support internal change and communication activities related to the BVAs
- Document application flows, data dictionaries and user stories for specific transactions
- Support for the release of BVAs, including external communications

Business and Integrated Activities

- Provide RFP support
- Prepare program communications
- Develop PMO processes and tools
- Establish high-level program plan
- Deliver internal communications
- Deliver external communications
- Establish vendor onboarding plan
- Produce knowledge document
- Identify change considerations

Phase 3 continued to build on key Sub-Threads from Phase 2 and to prepare for implementation of the new platform

TECHNOLOGY

Business Value Accelerators
and Design Readiness

BUSINESS VALUE ACCELERATORS

WHILE RE-PLATFORMING IS A LONG-TERM COMMITMENT, BUSINESS VALUE ACCELERATORS (BVAS) HELP TO SOLVE PRESSING NEEDS FOR BUSINESSES IN THE NEAR-TERM ON THE CURRENT PLATFORM

KEY COMPONENTS

High Business
Impact

Address Urgent
User Needs

Relatively Low
Hurdles to
Implement

Reusable
Concepts

ADDING VALUE TO THE GATEWAY

DELIVERING USER-FACING ENHANCEMENTS

BUSINESS VALUE ACCELERATOR

KEY “WIN”



1 PASSWORD MODERNIZATION

Requires users to have updated accounts (answers to 3 security questions and an updated email address), and provides a new guide with the information users need to be able to change and reset passwords



Online self-service and password reset functionality significantly increases user efficiencies, directly address high-priority frustrations, and may decrease reliance on the help desk in the long-run

**Nov. 2015
Go-Live**



2 SELECT HELP DESK IMPROVEMENT

Reconstructed and re-ordered the call tree to more readily direct users to the most appropriate help desk



Improvements to the call tree route users to answers in a more timely fashion

**Nov. 2015
Go-Live**



3 REFRESHED DESIGN ON SELECT PAGES

New design on multiple Gateway pages, including home, splash and access pages



Modern “look and feel” enhances the user experience and overall system ease-of-use, allowing users to navigate and find key information more efficiently

**Dec. 2015
Go-Live**



4 USER ACCOUNT COMMUNICATIONS

New guide and messaging provides users with clear advice on how to establish a Service Provider and Client relationship



Users more easily understand the types of accounts available, and how to set up rights for accounts, particularly targeted for Service Providers (e.g., CPAs)

**Dec. 2015
Go-Live**

ENHANCING THE EXPERIENCE

BVAS DROVE ENHANCEMENTS ACROSS THE USER JOURNEY



VALUE ACCELERATORS

DELIVER VALUE TO USERS IN THE NEAR-TERM

Mockups, designs, support, communications and other materials were produced in order to guide the successful deployment of Business Value Accelerators

DESIGN

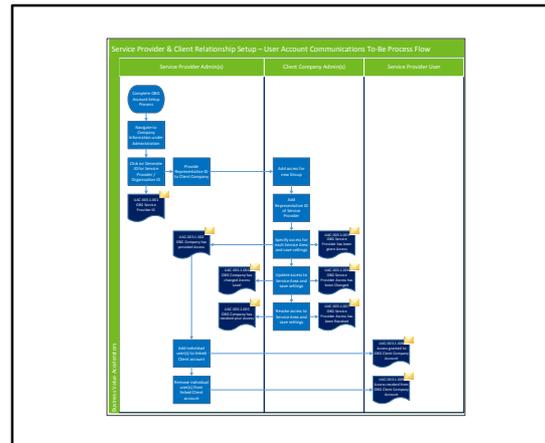
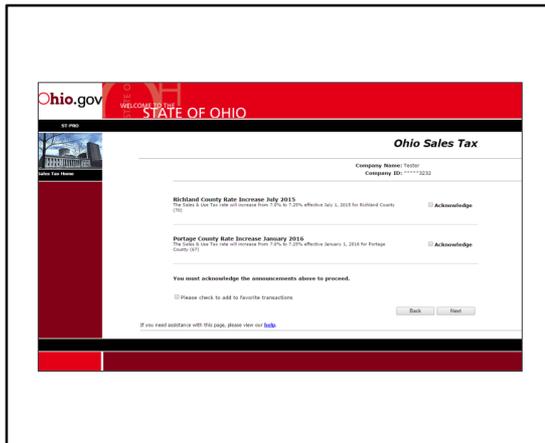
- New concepts for redesigning key Gateway webpages and other visuals

SUPPORT

- Support for operational delivery of the BVAs

COMMUNICATIONS

- Collateral for disseminating critical information on BVAs to internal and external users



BVA COMMUNICATIONS

RELAYING CRITICAL UPDATES TO INTERNAL AND EXTERNAL USERS

Internal Communications

Providing Service Partners (i.e., agencies), help desk representatives and internal stakeholders with key information prior to release drives a communal understanding of updates on a need-to-know basis



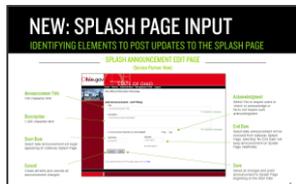
Emails: Awareness of Upcoming Changes

- Shares nature of upcoming release functionality and relays any requests



Summary Updates: Talking Points

- Includes talking points for addressing user questions on Gateway updates and provides guidance on solving potential users inquiries



Guides: Contextual Updates

- Provides screenshots of new pages and need-to-know instructions on new functionality and how behaviors / processes may have changed



External Communications

Relaying critical information to business users prior to release and supporting new features post-release helps keep users up-to-date



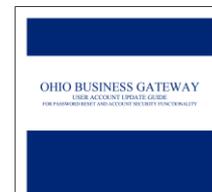
Emails and/or Newsletters: Critical Updates

- Informs users of critical upcoming account changes and recommended actions



Website Updates: Announcements

- Announces key updates to the Gateway and promote enhancements made as part of the modernization effort



Guides: Step-by-Step Instruction

- Updates users on how to utilize new and pre-existing functionality via guides and tutorials



Legend



Password Modernization



Select Help Desk Improvement



Refreshed Design on Select Pages



User Account Communications



Not Part of BVA

PASSWORD MODERNIZATION

1 SUPPORTING USERS THROUGH THE ACCOUNT UPDATE PROCESS

MARKETING COLLATERAL

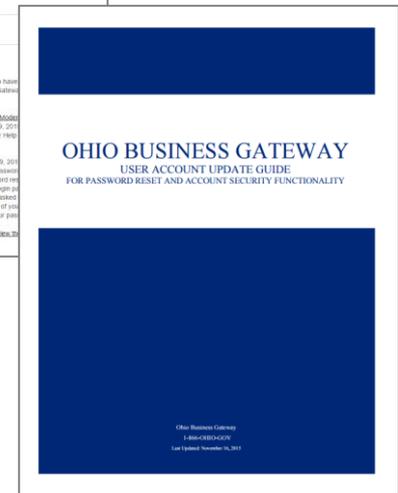
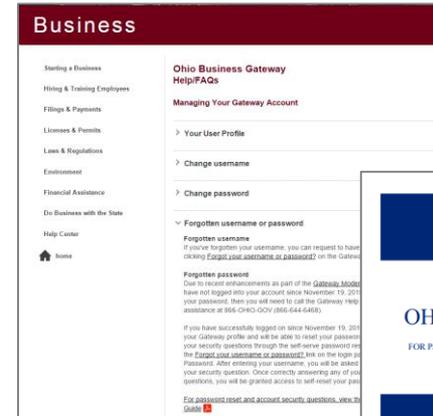


Mass Email Communication



Link to Guide

USER ACCOUNT UPDATE GUIDE



Online guide detailing how to update accounts, as well as manually reset a password without calling the help desk



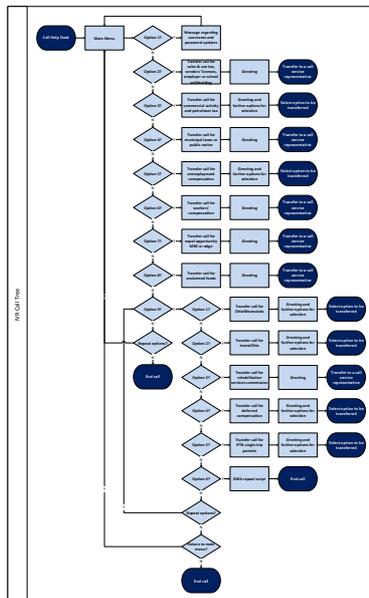
FAQ Page Link

HELP DESK IMPROVEMENT



MORE EFFICIENTLY DIRECT USERS TO THE MOST APPROPRIATE STATE HELP DESK

ORIGINAL CALL TREE

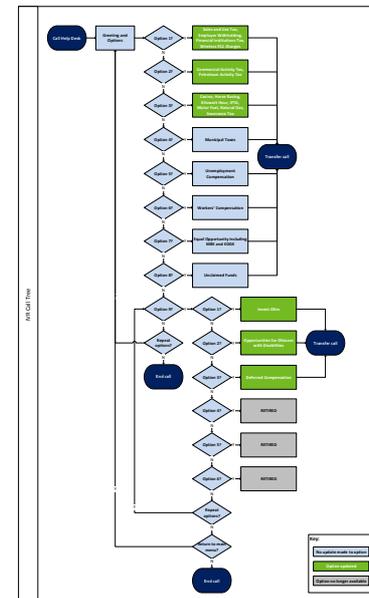


Users were often frustrated with their experience before they even talked to a representative:

- Users often entered a call loop of automated messages
- Significant number of decision points and steps were required before reaching a help desk representative



NEW CALL TREE



Directly addressed user complaints to make it more efficient to reach an appropriate representative:

- Removed call loop for automated messages
- Re-ordered and retired select options based on frequent calls
- Slimmed down number of pre-recorded messages that were not beneficial to users
- Updated tone of pre-recorded messages

DEEP DIVE: LANDING PAGE

3 SHOWCASING WHAT USERS SEE AFTER LOGGING INTO THE GATEWAY

ORIGINAL LANDING PAGE

The original landing page features a red header with the Ohio state logo and 'WELCOME TO THE STATE OF OHIO'. Below the header, there is a navigation bar with 'Home', 'History', 'Administration', and 'Logout'. The main content area is dominated by a large text block about BWC switching to prospective billing. Below this, there are several sections: 'Favorite Transactions' with a search bar and a list of transactions; 'Start a Service or Transaction' with a dropdown menu; 'Transactions In Progress' with a table of transactions; and 'Transactions Ready for Checkout (Ready to File and Pay)' with a list of transactions. The page is cluttered with text and has a complex layout.

NEW LANDING PAGE

The new landing page features a red header with the Ohio state logo and 'WELCOME TO THE STATE OF OHIO'. Below the header, there is a navigation bar with 'Home', 'History', 'Administration', and 'Logout'. The main content area is dominated by a 'Start a Transaction' section with a grid of transaction categories and a 'Ready for Checkout' section. The layout is clean and organized, with a clear focus on the transaction categories. The 'Start a Transaction' section includes categories like 'Opportunities for Ohioans with Disabilities - BIVISIP', 'Ohio Taxation - Sales and Use Tax', 'Ohio Taxation - Commercial Activity Tax', 'Ohio Taxation - Severance Tax', 'Ohio Taxation - Petroleum Activity Tax', 'Municipal Taxation - Net Profit Tax', 'Municipal Taxation - Withholding Tax', 'Ohio Deferred Compensation', 'Equal Opportunity Division', 'Ohio Development Services Agency', 'Ohio Taxation - International Fuel Tax Agreement', 'Ohio Taxation - Kilowatt Hour Tax - Self-Assessing Purchaser', and 'Ohio Taxation - Natural Gas Distribution Tax'. The 'Ready for Checkout' section includes categories like 'Ohio Taxation - New Account Registration and Fuel Permit', 'Ohio Taxation - Employer Withholding', 'Ohio Taxation - Wireless 911 Charges', 'Ohio Taxation - Financial Institutions Tax', 'Ohio Job & Family Services - UC Tax', 'OhioMeansJobs', 'Ohio Bureau of Worker's Comp', 'Ohio Dept. of Commerce - Unclaimed Funds', 'InvestOhio', 'Ohio Taxation - Horse Racing Tax', 'Ohio Taxation - Gross Casino Revenue Tax', 'Ohio Taxation - Kilowatt Hour Tax', and 'Ohio Taxation - Ohio Motor Fuel Tax'. The page also includes an 'Announcements' section with a welcome message and a 'Favorite Transactions' section with a 'No Favorites' message. The page is clean and easy to navigate.

- Cluttered announcements and text formatting
- Confusing sections for transactions with different statuses
- Difficulty in finding desired transactions upon Gateway log-in

- Enhanced ability to select desired transactions
- Straightforward display of transaction status without scrolling
- Streamlined announcements section
- Availability of favorite transaction section
- Addition of helpful links

DEEP DIVE: SPLASH PAGE

3 SHOWCASING THE PAGE SHOWN AFTER SELECTING A TRANSACTION

ORIGINAL SPLASH PAGE

Ohio.gov WELCOME TO THE STATE OF OHIO

ST: UST-0PL

Universal Sales Tax Return Instructions – Form UST-1

Company Name: Ohio Office of Information Technology
Company ID: *****0009

**** Attention: PLEASE READ****
The Sales & Use Tax rate will increase from 7.0% to 7.25% effective January 1, 2016 for Portage County (67)

****Attention: PLEASE READ****
The Sales & Use Tax rate will increase from 7.0% to 7.25% effective July 1, 2015 for Richland County (70)

****Attention: PLEASE READ**
The Sales & Use Tax rate will increase from 6.75% to 7.0% effective April 1, 2015 for Hamilton County (31)
The Sales & Use Tax rate will increase from 7.00% to 7.25% effective April 1, 2015 for Lucas County (48)
The Sales & Use Tax rate will increase from 7.0% to 7.25% effective April 1, 2015 for Mahoning County (50)

Back Next

If you need assistance with this page, please view our [help](#).



NEW SPLASH PAGE

Ohio.gov WELCOME TO THE STATE OF OHIO

ST: PFD

Ohio Sales Tax

Company Name: Tester
Company ID: *****3232

Richland County Rate Increase July 2015
The Sales & Use Tax rate will increase from 7.0% to 7.25% effective July 1, 2015 for Richland County (70) Acknowledge

Portage County Rate Increase January 2016
The Sales & Use Tax rate will increase from 7.0% to 7.25% effective January 1, 2016 for Portage County (67) Acknowledge

You must acknowledge the announcements above to proceed.

Please check to add to favorite transactions

Back Next

If you need assistance with this page, please view our [help](#).

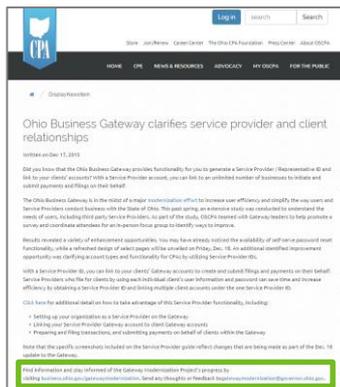
- Inconsistent look and feel of announcements
 - Multiple colors
 - Varying font styles
 - Differing font sizes
- Issues with display may lead users to intuitively disregard important messages

- Streamlined announcements with more professional and consistent look and feel
- Up-to-date announcements for users
- Digestible content to more effectively deliver key compliance-related messages

USER ACCOUNT COMMS

4 SUPPORTING SERVICE PROVIDERS

MARKETING COLLATERAL



Ohio Society of CPAs (OSCPA) Newsletter

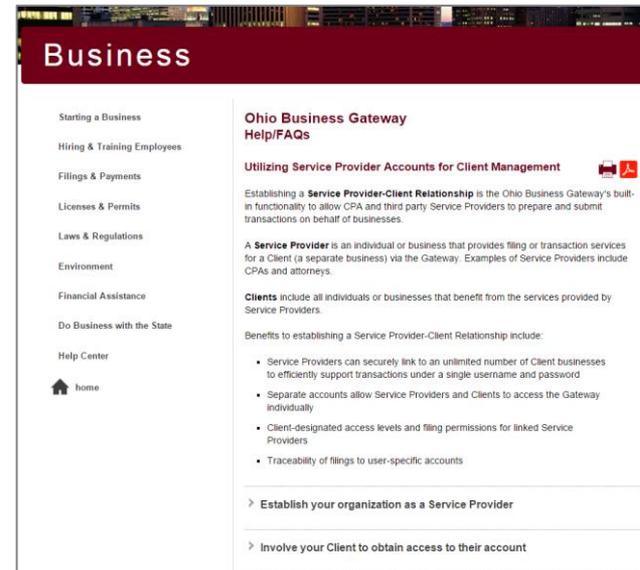


Gateway Link



"Suspected Service Provider" Mass Email

SERVICE PROVIDER HELP PAGE



Guide clearly illustrates how a user can establish a Service Provider account to more effectively manage Clients

BVA SUCCESS (1 OF 2)

EACH BVA RESULTED IN TANGIBLE IMPACT FOR USERS AND THE STATE

ACCELERATOR

TANGIBLE IMPACT



PASSWORD MODERNIZATION



- **First time** there has been a communication **delivered to every user** via email (promoting the Gateway, guiding them on required updates, and pointing towards availability of manual password reset feature)
- **Over 290,000 users have successfully updated their account** with 3 security questions and their email address, deeming them “complete” and now capable of self-serve password resets
- There have been over **6,000 views of the account update guide** since its November introduction (not including downloads from the mass communication email, which is expected to place the number even higher)



SELECT HELP DESK IMPROVEMENT



- **Number of steps** typically required to reach a representative **decreased from 3-4 to 1-2**
- **Time savings** to proceed through the call tree is **estimated to be 50%**
- Help desk call volume related to password resets did increase year-over-year for January, but this was expected in the short-term (if a user was unable to remember the password after this upgrade, the user had to call the help desk to reset the password initially due to security requirements)

BVA SUCCESS (2 OF 2)

EACH BVA RESULTED IN TANGIBLE IMPACT FOR USERS AND THE STATE

ACCELERATOR

TANGIBLE IMPACT



REFRESHED DESIGN ON SELECT PAGES



- **New page design** makes it easier for users to navigate the Gateway, review announcements, and take advantage of provided functionality (e.g., favorites), resulting in **time-saving efficiencies for users**
- **Anecdotal feedback** on new design has been very **positive** (from both users and internal stakeholders)



USER ACCOUNT COMMUNICATIONS



- **Users now have the resources available to them** to establish a Service Provider-Client relationship in the current system, which previously was difficult discover
- Engagement with Ohio Society of CPAs (OSCPA) shows a **dedication to enhancing the platform**
- Over **16,000 pageviews of the service provider help page** since the December update
- Views average over 150 views/day in 2016 compared to only 6 views/day for the same time period from 2014 and 2015, representing a **25x increase in pageviews**
- Data suggests the **guide has been extremely helpful** to Service Providers looking for efficiencies

DESIGN READINESS

PREPARING FOR REDESIGNED PROCESSES IN A MODERN PLATFORM

Application Flows, Data Dictionaries and User Stories were captured for 2 transaction types (Severance Tax and Unclaimed Funds) from 3 user perspectives (Businesses, Gateway Team Member and Service Partner)

APPLICATION FLOWS

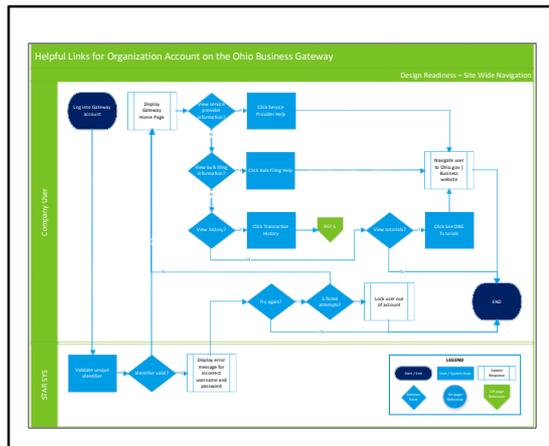
- Step-by-step process for proceeding through a relevant transaction within the Gateway

DATA DICTIONARIES

- Definitions for each data element / field name included in the relevant transactions

USER STORIES

- Descriptions of the required software features in relevant transactions from the perspective of users



Field Name	Dependency	Type	Field Description	Editable
Service Area Name	None	Action	Link to expand the transactions within the Service Area	Yes
Business Transaction Name	None	Action	Link to initiate the desired transaction	Yes
Created On	At least one transaction in progress	Date	Date on which the transaction was created by user	No
Transaction Name	At least one transaction in progress	Action	Action button to resume the transaction in progress	Yes
Recycle Bin	At least one transaction in progress	Action	Action button to delete the transaction in progress	Yes
Transaction Name	At least one transaction has been completed	Action	Action button to navigate back to the transaction to make any desired updates before checking out	Yes
Recycle Bin	At least one transaction has been completed	Action	Action button to delete the transaction ready for checkout	Yes
Total Due	At least one transaction has been completed	Numeric	Total amount due for the listed transaction	No
ACH	At least one transaction has been completed	Action	ACH amount of the total due for the listed transaction. Action button to edit the ACH amount.	Yes
Credit Card	At least one transaction has been completed	Action	Credit Card amount of the total due for the listed transaction. Action button to edit the Credit Card amount.	Yes
Checkout (File and Pay)	At least one transaction has been completed	Action	Action button to check out the desired transactions and make payments.	Yes
Title	Announcement exists to display	Alphanumeric	Title of the announcement added by Help Desk to display on the Home Page	No

User	Function	Description
Company Administrator	Create Organization Account	As a Company Administrator, I want to create a Gateway account on behalf of a business so that I can file transactions on behalf of a business.
Company Administrator	Create Organization Account	As a Company Administrator, I want to Create a Gateway Account as an individual so that I can file transactions on behalf of a business.
Company Administrator	Company Information	As a Company Administrator, I want to edit Company information so that I can make changes to my organization's basic information.
Company Administrator	Company Information	As a Company Administrator, I want to edit Company Information so that I can generate a Service Provider / Representative ID for filing on behalf of other businesses.
Company Administrator	Create User	As a Company Administrator, I want to create a user with Administrator access so that another user can manage my organization's Gateway account.
Company Administrator	Create User	As a Company Administrator, I want to create a user with All Access so that another user can submit transactions and payments on my organization's Gateway account.
Company Administrator	Create User	As a Company Administrator, I want to create a user with Limited Access so that another user can submit transactions on my organization's Gateway account.
Company User	Create User	As a Company User, I want to receive an email when I am added to an Organization account so that I can complete the account setup process.

BUSINESS AND INTEGRATED ACTIVITIES

Change & Communication and
Program Execution Readiness &
Leadership Support

CHANGE & COMMUNICATION

PLANNING AND EXECUTING KEY INITIATIVES

Materials were developed to help structure the State's approach to managing change throughout the modernization effort, as well as execute and deliver communications to internal and external stakeholders

CHANGE MANAGEMENT

- Plan for managing key change activities as part of the Gateway modernization effort

MILESTONE COMMS

- Deliver numerous communications to both internal and external stakeholders

PROGRAM COMMS & ENGAGEMENT

- Organize plans for engaging and informing stakeholders

KEY CONSIDERATIONS

FOR MANAGING CHANGE AS RE-PLATFORMING CONTINUES TO PROGRESS

Change Focus Area	Progress To-Date	Future Considerations
Leadership Alignment	<ul style="list-style-type: none"> Executive leadership, particularly from the Lt. Governor, State CIO and Leadership Cabinet, has been reconstituted The Gateway mission statement and guiding principles have been defined, along with the decision to re-platform 	<ul style="list-style-type: none"> Drive enhanced engagement from the Steering Committee and leadership, particularly as the governance model is activated Select a solution via the RFP process that is best exposed to deliver on the vision for the Gateway
Change Readiness & Impact	<ul style="list-style-type: none"> Stakeholder sets have been identified and change readiness/impact messaging opportunities have been assigned Stakeholder sessions have been completed 	<ul style="list-style-type: none"> Assess the impact the Business Value Accelerators and subsequent phase releases have had on users Continue to monitor stakeholder touchpoints, particularly managing the relationship with agencies and municipalities
Communication & Engagement	<ul style="list-style-type: none"> Activity tracker and communication plan established Internal and external communication plans have been delivered throughout the course of the modernization Clear communication for Business Value Accelerators has been a focal point 	<ul style="list-style-type: none"> Continue to evaluate against the communication plan, varying on external communications as the re-platforming begins to take shape Align the focus of communications to center on how the modernization will impact user behaviors
Process Redesign	<ul style="list-style-type: none"> Decision rights have been designed as part of the governance model Formal and informal communication plans have been delivered throughout the course of the modernization Clear communication for Business Value Accelerators has been a focal point 	<ul style="list-style-type: none"> Conduct business process re-engineering for optimized workflows, particularly on an understanding of current state processes Align the focus of communications to center on how the modernization will impact user behaviors
Organization Design	<ul style="list-style-type: none"> Decision rights have been designed as part of the governance model Formal and informal communication plans have been delivered throughout the course of the modernization Clear communication for Business Value Accelerators has been a focal point 	<ul style="list-style-type: none"> Define operating processes for the Gateway team that will become more important as re-platforming progresses and organizational change takes hold Continue to support the existing system as re-platforming is underway Design efficient hybrid and operating models Begin planning for changes that should be made to the Gateway organization and operating model (once a solution is determined)
Skills, Training & Development	<ul style="list-style-type: none"> Current operating team continues to focus on maintaining the existing system Outstanding the way for the System Engineer is under development 	<ul style="list-style-type: none"> Outband the System Engineer Determine the necessary skill sets for operating the new platform Train employees and sub-contractors appropriately on effective system operations on the new platform

THE OHIO BUSINESS GATEWAY

A CRITICAL TOUCHPOINT FOR STATE-BUSINESS INTERACTIONS

The Gateway processes nearly 5 million business transactions and \$11 billion in revenue annually for the State, offering services in collaboration with the following 8 Service Partners:

- Development Services Agency
- Department of Administrative Services
- Department of Commerce
- Department of Job & Family Services
- Department of Taxation
- 500+ Municipalities
- Opportunities for Ohioans with Disabilities
- Public Employees Deferred Compensation

The existing Gateway has served Ohio for 10+ years, but a rigorous discovery process for a modernized Gateway, including a [Discovery Process Report](#)

Note: The discovery process was based on available data, leading practice research, user survey responses, internal and external interviews, a user focus group, IT working sessions, and current state technical capability and gap analysis

COMMUNICATIONS PLANNING

TRACKING AND EXECUTING COMMUNICATIONS

Tool	Screenshot	Description	Relationship to Other Tools	Usage
MS Project: Master Plan		Manages a list of major program communication work products and touchpoints with stakeholder teams	The delivery of each work product listed will be supported by action items included in the MS Excel: Work Plan	Typically a good go-to for tracking action items with pre-defined processes and cadence, but not as dynamic or user-friendly for changing and evolving to-do's
MS Excel: Work Plan		Tracks specific action items in a log with clearly identified dates and owners in order to deliver the communications work product	This will be used to support the delivery of work products in the MS Project: Master Plan	Must be used to deliver against key communication work products
MS PPT: Status Review		Provides a summary view of the key communication-related activities for the week ahead	Action items for the upcoming week will be pulled from the MS Excel: Work Plan	Align on the key activities and focus areas for the week ahead, and raise any outstanding items
Email: Daily To Do's		Provides a brief list of just the critical to-do's for each day as needed	Generated based on a review of the daily activities from the MS Excel: Work Plan	Assessing a quick list of the high priority action items, focusing on brevity

DELIVERING COMMUNICATIONS

SELECT DOCUMENTS PLANNED AND DELIVERED

Internal Communications

Inform Stakeholders



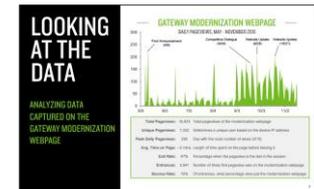
Briefing
Overview of the Gateway modernization



Talking Points
Modernization high-level key information



Gateway Branding
Alignment on key Gateway terms



Webpage Analysis
Insights from webpage viewership

External Communications

Promote Awareness



Video Monologue
Feature Lt. Governor in an annual update



OSCPA Interview
Interview of the Lt. Governor by the Ohio Society of CPAs



Website Update
Highlight progress and key activities



Primer
Handout for business community meetings

PROGRAM READINESS

PREPARING A ROBUST PROGRAM TO SUPPORT RE-PLATFORMING

Engaging executive stakeholders, planning for the onboarding of the System Integrator, and defining PMO processes and tools help to prepare the State and vendors for executing the build-out of the new platform

GOVERNANCE MATERIALS

- Create documents and facilitate executive-level governance meetings

ONBOARDING MATERIALS

- Develop materials to support the eventual onboarding of a System Integrator

PMO PROCESSES & TOOLS

- Establish project management processes and provide tools for managing the program

KEY NEXT STEPS

FOR MOVING COMMUNICATIONS FORWARD

BVA Communications

- Continue to release BVA-related content according to the plan
- Follow-up with users from the past survey and focus group with a new short survey to capture feedback and success stories for the BVAs

Video Monologue

- Film and produce a video featuring the LL Governor in early January, serving as an annual report-out of the Gateway and a look ahead at changes to come
- Post video online in latter half of January

Logo Contest

- Conduct initial university outreach to gauge interest in students participating in a contest for re-designing the Gateway's logo
- Kick off contest in January

External Engagement

- Collaborate with agency-specific social media sites to promote Gateway BVAs
- Continue to post updates to business.ohio.gov promoting the Gateway Modernization Project

7

90 DAY PLAN

THE ONBOARDING PLAN IS DIVIDED ACROSS FIVE MAJOR TIME SEGMENTS

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PMO PROCESSES OVERVIEW

PMO PROCESSES REQUIRED TO EFFECTIVELY MANAGE AND CONTROL THE GATEWAY MODERNIZATION PROJECT BUILD EFFORT

Process	Description	Tools
Risk Management	<ul style="list-style-type: none"> • Identification, documentation, communication and monitoring of unforeseen events that could possibly occur during the project and adversely affect the project scope, quality, budget, and schedule • Establishment of mitigation plans that will eliminate or minimize the possibility of the risk occurring or reduce the impact if the risk does occur 	<ul style="list-style-type: none"> • RAID Log
Issue Management	<ul style="list-style-type: none"> • Identification, documentation, communication, resolution, and controlling of foreseeable events/problems that are currently occurring and need to be resolved • Issues should be resolved immediately so that the project can move forward • Issues that affect the project's scope, quality, budget, and schedule, and may require a Change Request • Action plans are developed for issues 	<ul style="list-style-type: none"> • RAID Log
Change Request	<ul style="list-style-type: none"> • Change requests in the process how the various changes to the project scope, quality, schedule, resources, budget, PMO processes and structure are documented, reviewed, approved, and executed through the project leadership for decision making • Change requests must be made formally, via the Change Request Form, and the changes are not to be implemented until they are formally approved 	<ul style="list-style-type: none"> • Change Request Template • Meeting Agenda & Notes
Status Reporting	<ul style="list-style-type: none"> • The method of reporting to CBO 3.0 stakeholders project strategies, plans and responses to project scope, schedule, risks, and cost through the build-out cycle • The reporting to CBO 3.0 stakeholders the management of project issues and risks 	<ul style="list-style-type: none"> • Weekly Status Report • Quarterly Status Report • Performance Dashboard • Meeting Agenda & Notes

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