



The SAS PM Methodology

Benefits of the SAS PM Methodology

The PMM implementation methodology is based on the collective best practices of SAS Institute consultants, partners and customers worldwide who have successfully implemented solutions catering to a variety of business intelligence, marketing, risk management, market planning requirements. The methodology offers several benefits to practitioners:

- Flexible implementation process with key integration points to ensure smooth transition to components as well as phases of the implementation.
- Rapid deployment to business users in a phased manner, based on organizational preferences.
- Reduced risk as business users participate in the entire implementation process as well see quick results due to the phased implementation.
- Iterative approach leading to repeatable phases of implementation resulting in increased efficiency as phase's progress. Learning from earlier phases can be quickly applied to the new phase.
- Rapid return on investment as users can begin to exploit capabilities as they are implemented instead of the big bang approach of rolling out after everything is fully implemented.
- Flexibility in the implementation process while maintaining tight control over scope and budget.
- Facilitates knowledge transfer for independent operations in the future

The SAS PM Methodology is based on best practices, intimate knowledge gained by the SAS Project Management team worldwide and industry standard methods for implementing solutions to demanding customer environments. The methodology is based on progressive stages with rigorous checks and balances at the end of every stage. The methodology delivers clear deliverables during each stage of implementation and embraces specific product/solution implementation methodology wherever applicable. Specifically the SAS PM methodology embraces the following solution specific methodologies:

1. the Rapid Warehousing Methodology (RWM)
2. The SEMMA methodology for data mining projects
3. the Marketing Automation implementation methodology and
4. the Market Max 10-stage implementation methodology.



The stages in the SAS PM Methodology

Phase / Process	Mobilization	Requirements & Design	Execution	Close-Out
Initiation	<ul style="list-style-type: none"> • Sign legal documents • Create project charter • Identify key client contacts • Stakeholder requirements 	<ul style="list-style-type: none"> • Approved project controls 	<ul style="list-style-type: none"> • Approved requirements, design and test plan documents 	<ul style="list-style-type: none"> • Approved test documents • Approved manuals • Approved knowledge transfer
Planning	<ul style="list-style-type: none"> • Appoint project manager • Resource project team/ partners • Select methodology • Project set-up (PSA and Tenrox) 	<ul style="list-style-type: none"> • Approved plan for definition phase 	<ul style="list-style-type: none"> • Finalize resource management plan • Continue detail project schedule • Definitive Estimate 	<ul style="list-style-type: none"> • List of future requirements
Execution	<ul style="list-style-type: none"> • Verify project objectives • Verify project budgeting • Project controls document • Project kick-offs (internal/ external) 	<ul style="list-style-type: none"> • Requirements interviews • Project definition document (PDD) • Design document • Design review • Test plan document • Additional project planning – resource/procurement 	<ul style="list-style-type: none"> • PQM integration • Code reviews • Test plan documentation • Client UAT • Client billing • Pay procurement Invoices • Technical manuals • User manuals • Knowledge transfer to client 	<ul style="list-style-type: none"> • Closure letter • Final invoicing • Issue logs • Settle claims & disputes • Close legal contracts • Archive project documents • Lessons learned • Value assessment • Skills inventory update
Control	<ul style="list-style-type: none"> • Scope control • Change control • Schedule Control • Cost control • Risk control • Communications • Resource management • Status reporting • Document capture (PSA) 			
Closing	<ul style="list-style-type: none"> • Project checklist completed 	<ul style="list-style-type: none"> • Project checklist completed 	<ul style="list-style-type: none"> • Project checklist completed 	<ul style="list-style-type: none"> • Customer satisfaction survey • Knowledge base



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The SAS PMM Controls

Issue	Tools
Risk Mitigation	<ul style="list-style-type: none"> • Client/Vendor Steering Committees • Client/Vendor Escalation mechanisms
Schedule Control	<ul style="list-style-type: none"> • Project Status Reporting • Change Control
Knowledge Transfer	<ul style="list-style-type: none"> • Shadowing • Project Support and Product Support
Project Closure	<ul style="list-style-type: none"> • Project Review • Customer Satisfaction Survey

The SAS PMM Deliverables

Phase/Process	Deliverable
Initiation	<ul style="list-style-type: none"> • Project Initiation (Scope) Document
Requirements & Design	<ul style="list-style-type: none"> • Project Definition Document • Project Plan • Design Specification Document • Test Plans
Construction	<ul style="list-style-type: none"> • Data Marts • Models • Reports
Deployment/Knowledge Transfer	<ul style="list-style-type: none"> • Production rollout • Site specific documentation (technical & user)

The SAS PMM Tools

Issue	Tools
Project Management	<ul style="list-style-type: none"> • Client Steering Committees • Vendor Steering Committees
Problem Escalation	<ul style="list-style-type: none"> • Client Problem Escalation Mechanisms • Vendor Problem Escalation Mechanisms
Change Control	<ul style="list-style-type: none"> • Change Orders • Change Approval