Project Closeout Report

Submitted to Large Project Oversight on 3/9/2020

GENERAL INFORMATION

Project Name: myWSI Enhancements (R1-R2) Project

Agency Name: Workforce Safety and Insurance

Project Sponsor: Valerie Kingsley (formerly Tim Schenfisch)

Project Manager: Jennifer Kunz

SCHEDULE AND COST METRICS

	Baseline Start Date	Baseline End Date	Baseline Budget	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
Original Baseline	7/1/2017	6/28/2019	$1,032,409	9/3/2019	9% behind	$983,891	4.6% under
Final Baseline		6/28/2019	$1,032,409	9/3/2019	9% behind	$983,891	4.6% under

Notes:

MAJOR SCOPE CHANGES

There was one major scope change for Release 2 to align features with CAPS Release 6.

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OBJECTIVES

Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
Business Need 1: Streamline processes related to information from/to external audiences Objective 1.1: Review and improve current processes affecting external stakeholders	Measurement 1.1.1: Reduce the number of contacts with WSI staff per thousand policyholders/claims by 10% within the first year.		This measurement will be taken in late 2020.
Business Need 2: Increase online interactivity for WSI's stakeholders and partners Objective 2.1: Design a site that is user-friendly, easily navigable and targets appropriate audiences	Measurement 2.1.1: Increase by 10% the number of external stakeholders using available extranet portal features within the first year		This measurement will be taken in late 2020.
Objective 2.2: Create the extranet to be adaptable to mobile devices	Measurement 2.2.1: Site accessible via iOS, Android, and Windows devices	Met	Stakeholders and partners are able to access myWSI via mobile devices.

POST-IMPLEMENTATION REPORT

Post-Implementation Reports are to be performed after a project is completed. A "PIR" is a process that utilizes surveys and meetings to determine what happened in the project and identifies actions for improvement going forward. Typical PIR findings include, "What did we do well?" "What did we learn?" "What should we do differently next time?"

Lesson Learned, Success Story, Idea for Next Time, Etc.

	Release 1	**Lesson Learned**
1.	**Successes**	
a.	Good collaboration between the WSI and Nexus development teams through the solution development.	Continue supporting and ensuring these successes are maintained.
b.	The training provided by Jason, Danette and Marsha was wonderful and I can see the URC UR Chiro applications that were deployed as very valuable to the UR Department. They will help provide better/faster service to the injured workers!	
c.	I feel it went well, even though I was 'new' to basically everything about the project. Nexus was responsive and I liked the training/testing 'sessions,' although I do feel those could have been done sooner rather than later.	
d.	Issues were corrected when identified during testing.	
e.	I thought it went well.	

	Release 1	Lesson Learned
f.	The technical team members (from multiple areas) completed significant changes/improvements to the environments (getting the myWSI environments set up to mirror the CAPS/WSI legacy applications environment), which was a major accomplishment and had only minor issues post-go-live.	
g.	There were some snags with the scripts and bugs with Go live, but overall, they were fixable; we just had to all work together (which we did) to figure them out.	
h.	The frequent technical touch-bases with ITD before Go-live worked well.	
i.	Very good collaboration across multiple organizations (WSI, Nexus, ServiceLogix, ITD) working on issues together with little friction.	
j.	Early on, there were a lot of unknowns from the developers' standpoint; as the project progressed it became easier for who to contact, etc. The WSI team also grew its knowledge base on what their capabilities and skills for tasks were; James, in particular, contributed to the team in a new role and Justin was very prompt to respond to questions/needs.	
k.	The morning stand-up calls for the Nexus-WSI developers were good; short and to the point.	
l.	The Nexus team was easy to get in touch with and responsive to WSI needs. Having Jason on-site to coordinate was beneficial.	
m.	The OneNote documentation was helpful.	
n.	Both teams grew through working together. We learned good communication through difficult situations.	

2.	Improvement Areas – Release 1	
Functionality/Requirements		
a.	It would be nice if the providers could click and view the letter for the summary. We might be faxing the letter quite a bit, so they can see the summary.	Incorporate this feedback into the change request process for a possible enhancement.
b.	Provider training was good; however, there were some areas identified that may have resulted in a better outcome if the provider had been shown the application earlier in the development. Now the suggestions need to be implemented in a maintenance release and timing due to CAPS releases is an issue.	Ensure the right representation is present during requirements gathering and/or the team is making contact with the right individuals. The Planning and Communications Teams have discussed an approach for incorporating this and it will also be discussed with the Core Team.
c.	Increased input from providers on what features they would like to see could have improved initial reception to some features (UR-C and UR-Chiro).	Ensure the right representation is present during requirements gathering and/or the team is making contact with the right individuals. The Planning and Communications Teams have discussed an approach for incorporating this and it will also be discussed with the Core Team.

d.	Earlier involvement for developers is needed.	Involve developers at a high level during requirements gathering for context of what work is needed to be done. Include better mockups for current applications and changes that will be made.
e.	Unidentified downstream impacts from future state processes.	Discuss "To Be" operational process/work instruction definition earlier into the process; also, earlier functional prototyping and applying real life scenarios to prototypes that already are being produced.
f.	All impacted stakeholders should be a part of requirements gathering, e.g. CMS impacted parties.	Ensure the right representation is present during requirements gathering and/or the team is making contact with the right individuals. The Planning and Communications Teams have discussed an approach for incorporating this and it will also be discussed with the Core Team.
Communication/Collaboration		
g.	Better communication between teams would have helped. When WSI needed something from Nexus (or vice versa) the turn-around was generally fast.	Seek feedback and opportunities for communications improvements.
h.	There was a miscommunication about installing the antivirus solution (Clam AV license) on the production server which caused a change request.	Ensure all ITD architects (software and computer systems) are involved in new service discussions, e.g. both for the web service and for solutions like Clam AV.
i.	Roles and expectations weren’t entirely clear. Need to identify the point person that can bridge the gap between WSI business process and the technical side of what is happening.	The Planning Team will discuss this area and review the project roles as a full team (perhaps during Kickoff of Release 2).
j.	Surface questions early.	Pose the questions and the right person will respond – contact the project manager and utilize the daily standups.
k.	Improve collaboration with developers.	Utilize more (and earlier) collaboration type activities with all developers involved in the project, e.g. establish a War Room.
l.	Improve coordination between CAPS and myWSI projects.	Continuous coordination at a PM and BA level is needed to ensure that CAPS and myWSI are aligned on schedules, strategy, architecture, and standards.
m.	Multiple document repositories are a challenge.	Consider housing all the project documents in one place for WSI Projects. The Planning Teams will discuss this, but it would likely require WSI to set a standard/requirement for all vendor partners to use x repository.
Technical (Architecture)		
n.	There were some issues getting test environments set up with ITD: Oracle client, SSL (security) certificates, and IP addresses – this was still occurring up to development.	The technical team discussed this during the monthly technical touch-base call with ITD. There won’t be as many configuration changes next release, so that will be helpful. There were resource constraints on the Nexus side earlier on that created some impacts downstream as well.

o.	The architecture design for the new web service at WSI was difficult – options were discussed, but is there a better way to assist WSI with navigating this area, i.e. fully explore options?	The technical team discussed this during the monthly technical touch-base call with ITD. In future meetings, the team will reference the overall myWSI architecture more frequently, ask better questions, e.g. is this short-term and what is the long-term architecture plan?
p.	Make sure developer's PC's are set up correctly for development earlier in the process.	Work with Steve and Bryon to get AD permissions set up as early as possible.
q.	Team could be more explicit about which environment changes needed to occur in what order. There were some changes deployed with the UAT build at the last minute.	Talk through the deployment process more as a full team.
Technical (Development and System Testing)		
r.	Knowing more about current processes and current applications (from a developer standpoint) would have been helpful.	Perhaps set up a "job shadowing" session for new developers to learn more (visually) about the current applications.
s.	Perforce had a huge learning curve and loss of functionality compared to code repository tools we are used to utilizing.	A proposal has been brought to the Planning Team for using the Nexus tool, Git, at the lowermost development level; a decision will be made by WSI for Release 2.
t.	More time was needed on changes to existing applications; was the appropriate time spent on greenfield applications?	The Planning Team will review and discuss schedule constraints at a more detailed level throughout Release 2.
u.	More code reviews are needed.	The Planning Team will review and discuss schedule constraints at a more detailed level throughout Release 2.
v.	More time for the modeling phase is needed.	Improve the definition around some of the data and better communication of changes / evolution.
w.	Begin the testing earlier; include integrated, end-to-end testing. The late testing brought on late changes and caused rushing in some instances.	The Planning Team will discuss schedule constraints at a detailed level throughout Release 2. Plan extra coordination duration/effort for areas where data will be passed from one system to another. Drive wider and deeper into downstream processes and outputs.
UAT		
x.	Improve the documentation of issues/procedures during UAT.	Keep a running punch list in UAT that gets adjusted/installed so that directions can be assembled for higher level environments, e.g. Prod
y.	If possible, halt late changes from the end users and add later in a maintenance release.	The Planning Team will review and discuss a potential cutoff/code freeze date for the Release 2 schedule.

Successes – Release 2		
		Lesson Learned
a.	Communication was much better between all the teams involved.	Continue supporting and ensuring these successes are maintained.
b.	Training was done very well with good communication throughout the process.	
c.	Integration testing went better this time because we were able work on integrations earlier than last time.	

Improvement Areas – Release 2		
		Lesson Learned
	Functionality/Requirements/End User Support	
a.	I believe we need to dedicate a lot more time and energy to discovering, analyzing, and planning for the real customer's needs and requirements--the external user. I believe this is already in flight and will receive a stronger focus for Release 3.	• The customer experience analysis is part of Release 3 Planning/Analysis. • That said, the Planning Team will continue discussing and implementing actions to improve project processes such as these.
b.	Implementation of an IT help desk for employers who encounter IT issues with accessing the site now that they are required to use the online services.	• This suggestion will be brought to the Planning Team and then escalated appropriately for further discussion/action.
c.	Additional actions for improving functionality/requirements were identified during the WSI staff retrospective meeting: • Involve customer service more • Include a customer experience analysis • Review content earlier in the project	

<table>
<tr><th colspan="3">Project Management (Scope, Schedule, Risk Management)</th></tr>
<tr><td>d.</td><td colspan="2">Actions for improving project management were identified during the WSI staff retrospective meeting:
• Have at least one test environment set to the actual date for PayPal testing, coordinate database environments
• Perform a code walk-through with ITD developers
• Provide a visual roadmap of all projects with operations
• Schedule a break after go-live for prod support before the next release
• More emphasis on benefits achieved and other accomplishments
• Have more retrospective discussions during the project
• Make certain that fixes made in environment are brought forward to all test environments
• Plan team building exercises</td></tr>
<tr><th colspan="3">Teamwork/Communications</th></tr>
<tr><td>e.</td><td>It seemed that several times there were glitches when a release was scheduled. I don't know what caused that to occur, but it was frustrating. I think the Nexus team worked very well on quickly resolving those issues and getting updates out. There are still some issues that are being worked on and I am looking forward to those updates. It would have been nice if some of the missing functionality had been shared with internal users so that we weren't surprised when the issues occurred and would have been better able to guide external users. I understand that there are reasons that things worked as they did and there is never a correct answer to prevent frustration.</td><td>• The size of the release and associated integrations, as well as difficulties with the deployment scripting, caused the glitches.
• That said, the Planning Team will continue discussing and implementing actions to improve project processes.</td></tr>
<tr><td>f.</td><td colspan="2">Additional actions for improving teamwork/communications were identified during the WSI staff retrospective meeting:
• Include people from other impacted areas so user expectations can be managed
• Coach and help end users understand role and activities
• Recognize milestones
• Monthly impact/touch-base discussions
• Reduce irrelevant emails
• Communicate issues earlier</td></tr>
<tr><th colspan="3">Training</th></tr>
<tr><td>g.</td><td colspan="2">Actions for improving training were identified during the WSI staff retrospective meeting:
• Plan the training schedule earlier, there was a time crunch to schedule the training sessions
• Improve user involvement
• Add accountability with training, e.g. make it required, complete a competency worksheet, etc.</td></tr>
<tr><th colspan="3">Testing</th></tr>
<tr><td>h.</td><td>I feel that several times issues weren't found early in the testing process.</td><td>• The size of the release and associated integrations have had</td></tr>
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<tr><td>i.</td><td>I think we were pushed for time toward the end of testing, not enough time to fully test the system and functionality as we have seen issues after go live with PayPal, AutoPay and such.</td><td rowspan="2">impacts not discovered during UAT. That said, the Planning Team will continue discussing and implementing actions to improve project processes.</td></tr>
<tr><td>j.</td><td>We definitely need a "pre-production" environment.</td></tr>
<tr><td>k.</td><td colspan="2">Additional actions for improving testing/issues management were identified during the WSI staff retrospective meeting:
• Increase user involvement
• Issues need to be fixed between UAT cycles; don’t begin the next cycle until ready</td></tr>
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