VERIFIED :

Name	N. Ito	Y. Kawahara	Yunus T.	Nazri E. Lubis
Signature				
	Pres. Dir.	Vice Pres.	Director	MR
Date	Sep. 28, 2016	28 Sep '16	Sep 27 '16	27 Sept 2016
Name	Asra H.	Feri I.	Agus B.	
Signature				
	ERP Services Division Head	Infromation System Multifinance Division Head	Sales & Marketing Division Head	
Date	15 Sept 2016.	26 Sept '2016	15 Sep 2016.	

REVISION HISTORY :

No.	Date	Description	Section	Author
0.1	21 Jan 2013	Initial Documents		Dade
1.1	09 Apr 2013	• Add the process of customer assessment & using the 'initial Pre-Sales checklist' • Remove the process of generating RTM, it will be moved to Project Initiation procedure		Dade
2.0	24 Apr 2013	Baseline Document		Ticho
2.1	21 Sep 2013	• Review the process and update the process flow to add the process asset and template to be used. • Add the policy of Engineering Change Proposal (ECP) and Request for Change (RFC)	 5.7.6	Yunus
2.2	25 Nov 2013	Update based on comment from Mr. Nazri & Mr. Iwaki • Definition → added Abbreviation & Acronyms • Project Team in definition • Assignment of PM by Division Head • Update who lead the Pre-Sales process	 2 2.3 5.1.A.3 5.2.7	Yunus
3.0	27 Nov 2013	Baseline Document		Ticho
3.1	11 Mar 2014	• Emphasize BRM as a leader of Pre-Sales activities. he/she should prepare a plan for performing this activities. • Make clear that Non Functional requirements should be identified in RFP. • PA should be revised if the project resources change. • PM should support the creation of proposal, especially to define the technical content (proposed solution). • Add process if requirements change should be managed by using RFC document.	5.2.1.7 5.2.2.3 5.2.6.7 5.2.7.1 5.2.10.1	Dade
3.2	25 Nov 2014	Update for improvement, based on detail findings in SCAMPI-A (follow up action plan) : • Add definition of Function Point Analysis • Revise the role based on RASCI for helping customer makes RFP • Change the reference document of estimating process • Change methodology to estimate project plan • Change the reference document that describe about project estimation	 2 5.1.F and 5.2.21 5.2.6.2 5.2.6.6	Mitha

		• Update related document for estimating project plan	6.6	
3.3	18 Dec 2014	Update based on review from Mr. Nazri: • Revise the activity explanation of Requirement Definition process • Revise the rule and standard of Requirement Definition process	5.1.F 5.2.2.1	Mitha
3.4	23 Dec 2014	Update based on review from Mr. Yunus: • Add the definition and abbreviation of Requirement Traceability Matrix (RTM) • Revise the rule and standard of requirement management	2.11 5.2.10	Mitha
4.0	24 Dec 2014	Baseline Document		Roosy
4.1	14 May 2016	Refinement on : • Numbering of section • Add definition, abbreviation & acronyms of Request For Change (RFC) and Subject Matter Expert (SME) • Add process of define Compatibility Matric on process C. Product & Vendor Identification • Update non functional requirement • Update rule & standard of process product & vendor identification by adding rule and standard of define Compatibility Matrix	2 5.C 6.2 6.3	Vevi N.
4.2	9 Jun 2016	Update based on review from Mr. Dade: • Update definition of Agreement, Package Point, and Subject Matter Expert (SME) • Update scope of procedure • Update process flow of Product & Vendor Identification • Update rule & standard of process product & vendor identification	2 4 5.C 6.3.6 ~ 6.3.10	Vevi N.
5.0	15 Sep 2016	Baseline	-	July H

1. OBJECTIVE

This procedure established to give clear guidance to conduct preparation for the new project on Pre-Sales Phase in PT. BSI that's aligned with Project Methodology Manual.

2. DEFINITION, ABBREVIATION & ACRONYMS

2.1. **Agreement** is a contract between BSI and its customer, desribing the project/services rendered by BSI to the Customer. There are 3 (three) types of agreement; Master Agreement, Technical Agreement & Service Agreement.

2.2. **Business Relation Manager (BRM),** PIC that manages the business relationship between BSI and customer. And also dealing with customer from Pre-Sales until Project Closing Phase.

2.3. **Function Point Analysis (FPA)** is standard method for estimation & sizing software development from the user's point of view. FPA quantifies the functions contained within software in terms that are meaningful to the software users.

2.4. **Package Point** is a standard method that equivalent to function point but it is used for standard package implementation without add-on function. Package Point forms the frame of reference or unit of measure for the size of an implementation project.

2.5. **Profitability Analysis (PA)** is a document that is created by Sales Person. This document is estimation of revenue budget, cost budget and gross profit projection of the project.

2.6. **Project Manager (PM)** is people who are assigned to manage, accountable and responsible for running the project life cycle.

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2.7. **Project Team,** consist the team who is assigned by Division Head to conduct the Pre-Sales process. The member should be selected based on the suitability between the capability (skill/experience) and the customer requirement.

2.8. **Proposal** is a document that is created by BSI as response to RFP from customer. It's main purpose is to propose solution and commercial scheme.

2.9. **Quotation** is a statement of price offer for a certain service to a customer. This form is issued by BRM PIC.

2.10. **Request for Change (RFC)** is a request from customer to change the agreed scope, schedule, resources which is effect to cost of the project or agreed go-live schedule of the project.

2.11. **Request for Proposal (RFP)** refers to document which normally issued by customer; as an official request to BSI to prepare proposal of the project.

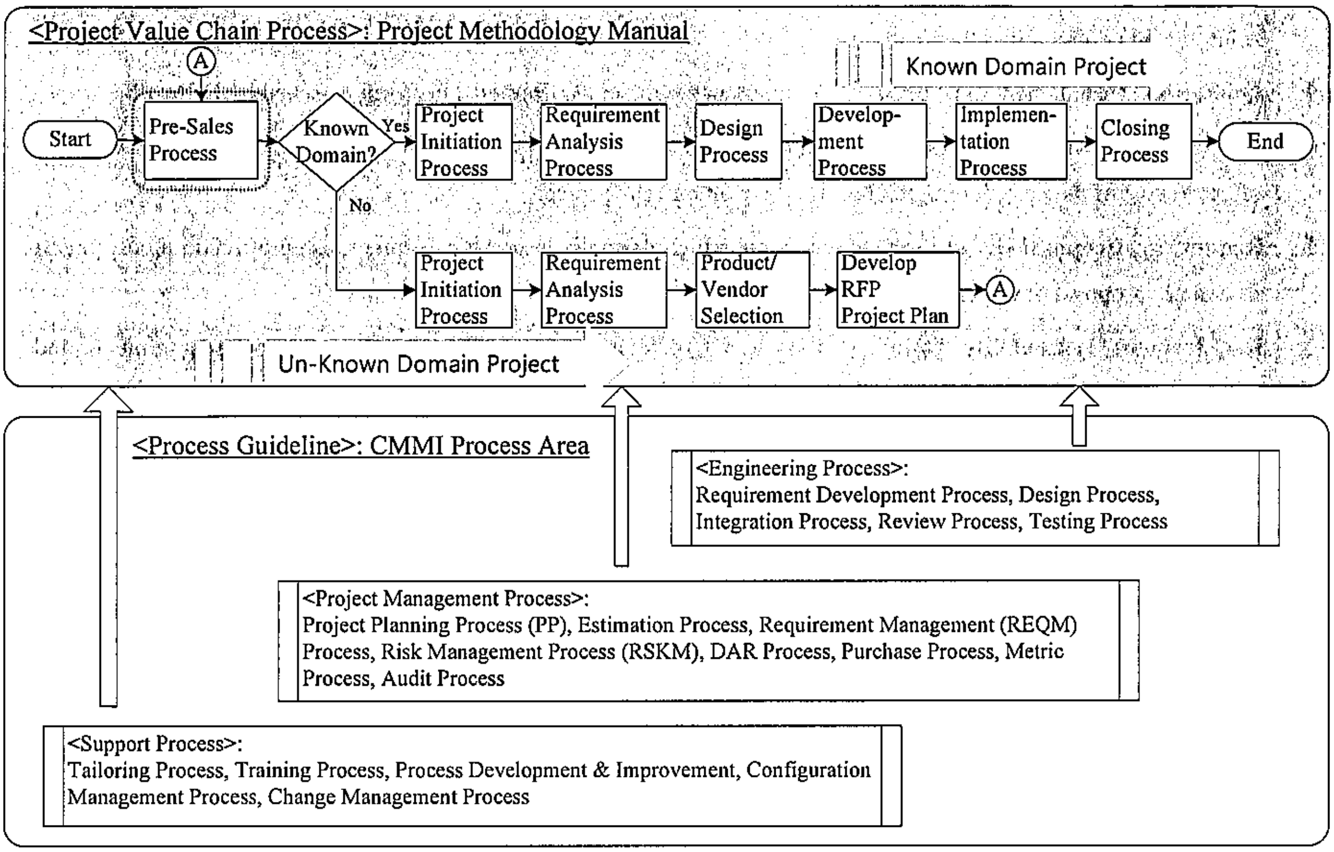
2.12. **Requirement Traceability Matrix (RTM)** is a tool to help ensure that the project scope, requirements and deliverables remain "as is" when compared to the baseline. Thus, it traces the deliverables by establishing a thread for each requirement from the project's initiation to the final implementation.

2.13. **Subject Matter Expert (SME)** is a person who has the expertise in a technical topic. SME's are often asked to review documents/ deliverables of the project and approve technical work.

2.14. **Work Breakdown Structure (WBS)** is a document that is used to define the project activities until a certain detail level (as needed). This document is created by the Project Manager in regard with the scope of work of proposed project.

3. PROJECT METHODOLOGY MANUAL

As stated in Project Methodology Manual, BSI Standard Process of Project Lifecycle as shown in below picture. This procedure will explain the Pre-Sales Process (Red Dot Line).



BSI Standard Process of Project Lifecycle

4. SCOPE

This procedure describes standard activities of Pre-Sales Phase of the project. This includes:

a. Initial Pre-Sales Assessment
b. Requirement Definition
c. Product & Vendor Identification
d. Define Project Approach (Tailoring)
e. Risk Management
f. Estimation Process
g. Proposal/Agreement Writing
h. Peer Review
i. Proposal Explanation & Approval
j. Requirements Management

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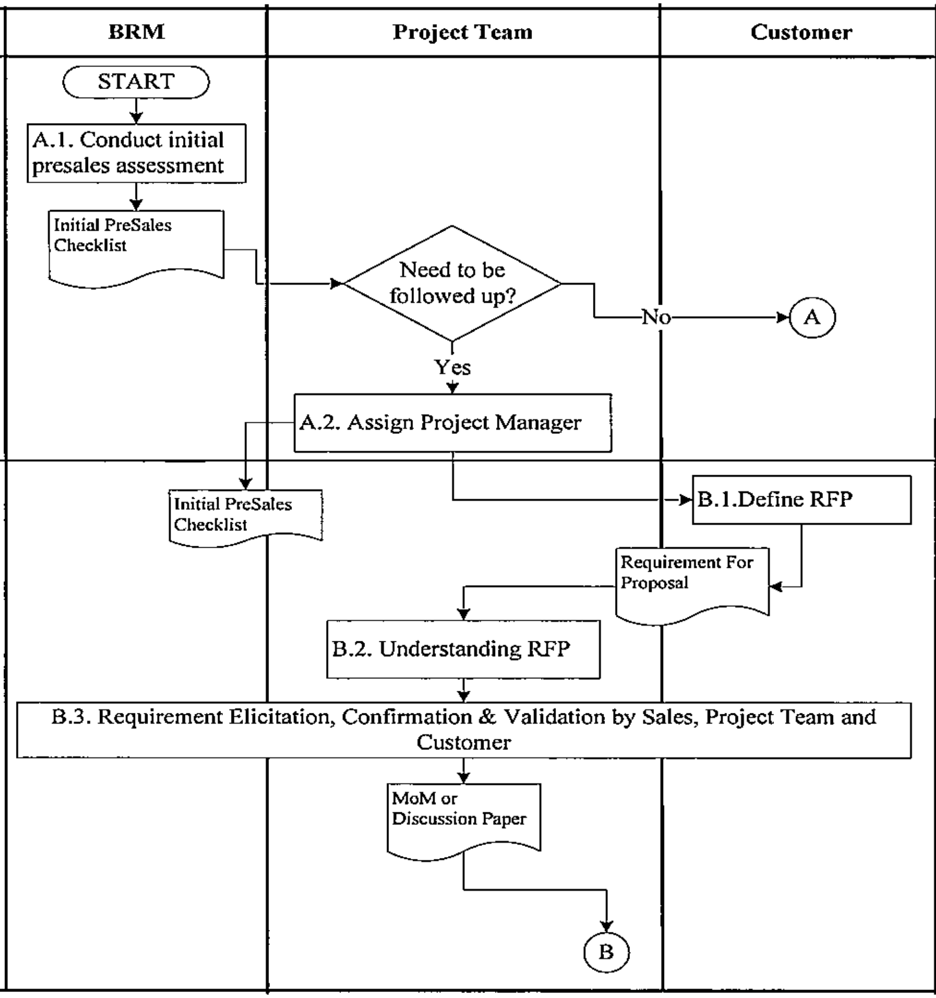
5. WORKFLOW PROCESS



Process Phase	Process Asset/ Template	Activity Explanation
A. Initial Presales Assessment	- Initial Presales Assessment Checklist	A.1. In the beginning of presales process, BRM should conduct the initial assessment regarding the prospect project & related customer. This assessment is conducted by gathering information about customer profile, their expectation & capability to conduct the project. BRM should submit the assessment result to Project Team Division Head (Related Division Head) for further assessment. A.2. If Project Team Division Head agree to follow up the project, then they should assign their member as PM of the prospected project in "Initial Pre-Sales Checklist" and confirm to BRM to make conclusion together.
B. Requirements Definition	- Requirement For Proposal (RFP) Template - Other System in Operation if any	B.1. Customer preparing the RFP. If customer cannot create the RFP, BSI PM and BRM should help them to define the document. B.2. PM should confirm their understanding of the project requirements by discussing content of RFP then ask their validation/approval. B.3.The process of elicitation should be documented in MoM or in Discussion Paper

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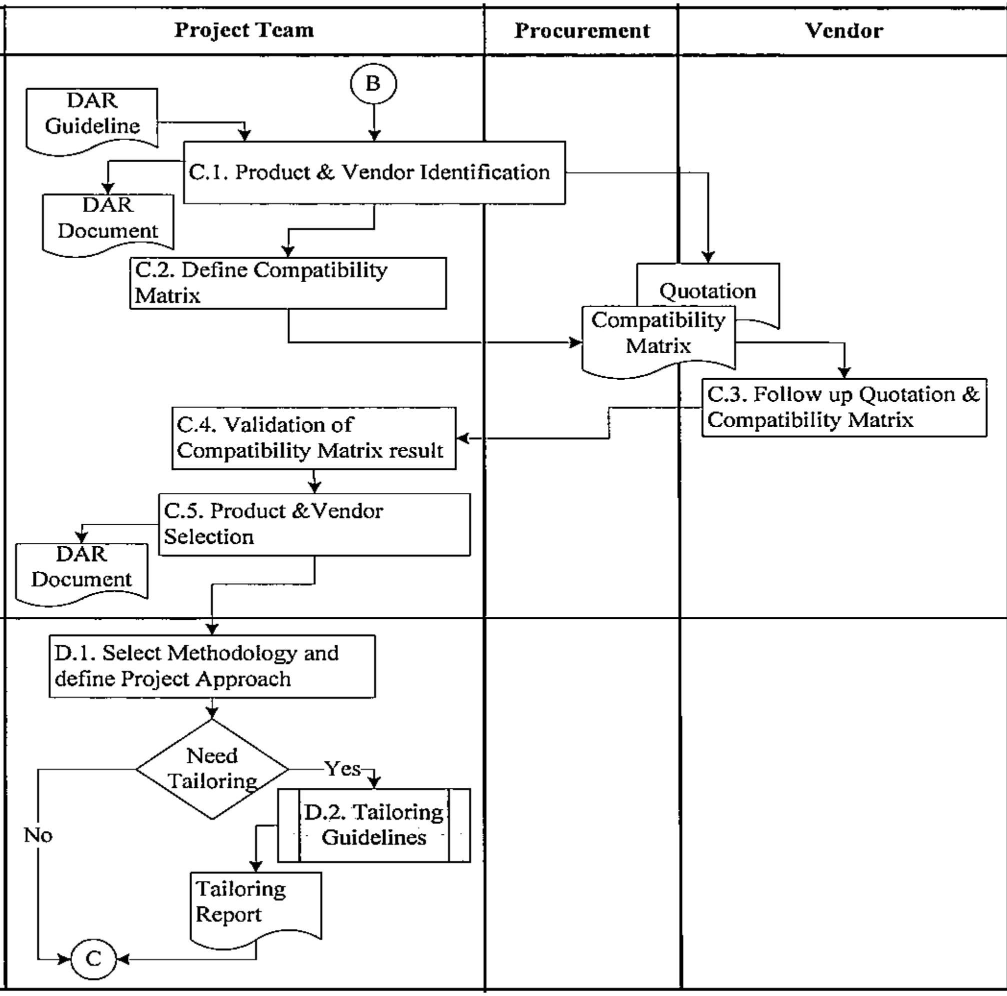
Process Phase	Project Team / Procurement / Vendor	Process Asset/ Template	Activity Explanation
C. Product & Vendor Identification		- Compatibility Matrix - Quotation - DAR Document - Project Repository - Lesson Learn - Best Sample	C.1. PM and Project Team may use Decision Analysis & Resolution Method to define appropriate product & vendor as solution to the requirements. C.2. PM and Project Team will defined Compatibility Matrix. Procurement team will sent the quotation & compatibility matrix to related vendor based DAR document result. C.3. Vendor will sent the follow up of quoation and compatibility matrix to BSI C.4. PM & Project Team will validate the result of compatibility matrix that already sent by vendor. During this step Project Team will conduct discussion session/confirmation with each vendor/principal related to follow up of quotation and compatibility matrix C.5. PM and Project Team may use Decision Analysis & Resolution Method to select Product or Vendor based on result of discussion with each vendor.
D. Define Methodology of Project		-Project Methodology Manual -Project Repository -Lesson Learn Repository -Tailoring Guideline -Tailoring Report Template	D.1. PM, Project Team and Subject Matter Expert (SME) discuss the methodology are going to be used. If possible, in the beginning of the project we inform customer about our approach and our document template. D.2. I In case the team realizes that our standard of methodology (Lifecycle and Template) need to be customized than Project Team should fill the Tailoring Report and submit to QA for validation and approval.

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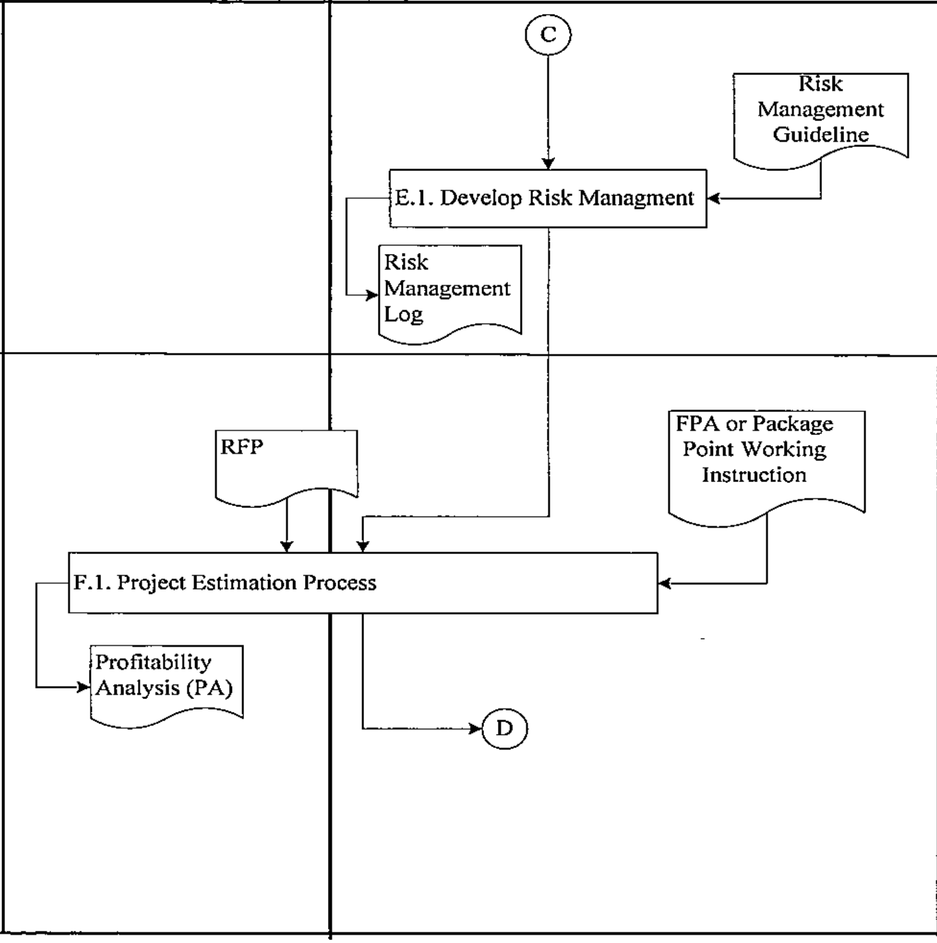
Process Phase	BRM	Project Team	Process Asset/ Template	Activity Explanation
E. Risk Management			- Risk Management Guide Line - Risk Database in "Metric Template" - Project Repository - Lesson Learn Repository	E.1. PM should read the Risk Management Guideline. Also refer to the Project Metric >> Risk Databases (Worksheet) to see the applicable risk on this project. Based on reference, PM will fill in the Risk Management Log (Project Metric>>Risk Management (Worksheet))
F. Estimation Process			- Estimating Project Using FPA or Package Point Working Instruction - WBS - Profitability Analysis Template	F.1. Indentify the effort/mandays of project based on Estimating Project Using FPA or Package Point Working Instruction. Comparing result with effort in WBS. Project Team will calculate the Project PA and adjust based on discussion with BRM



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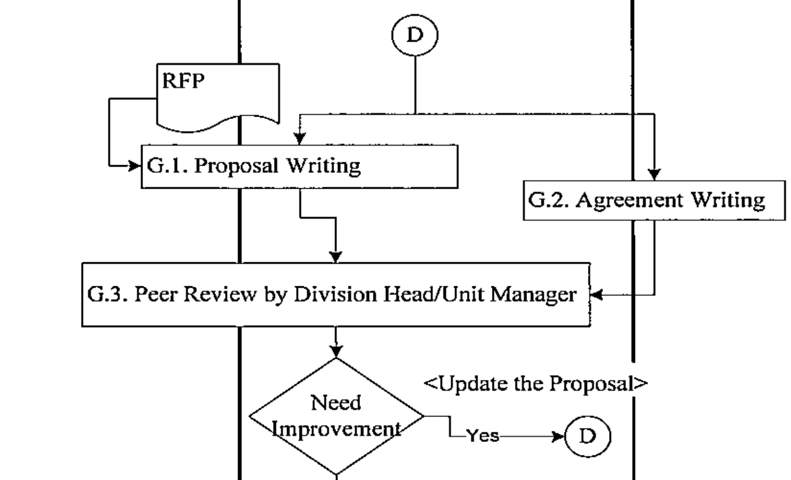
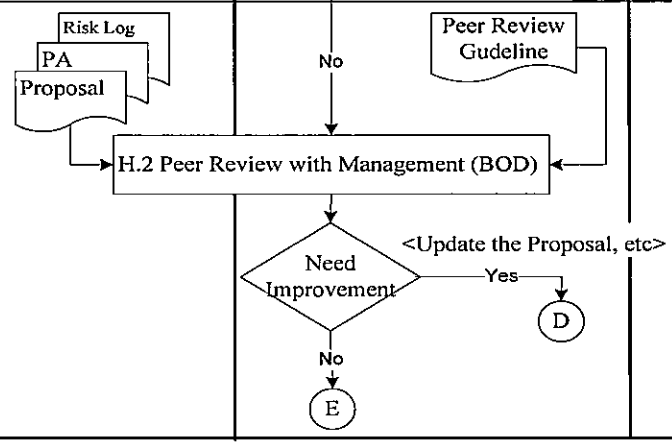
Process Phase	BRM	Project Team	Legal	Customer	Process Asset/ Template	Activity Explanation
G. Proposal Writing					- Proposal Template - Agreement Template	G.1. PM and BRM working together to prepare the proposal. G.2. Draft of proposal that both parties agreed is submitted to Legal Team to prepare the Agreement. G.3. Project Team invites Division Head to conduct review the proposal's content. This review could be desk review or in meeting. Division Head will decide based on the size of the project.
H. Peer Review with Management					- Peer Review Guideline	H.1. Refer to Peer Review Guideline, PM makes schedule of review. H.2. Based on the defined schedule, Peer Review will be conducted. - PM will explain the proposal, WBS and Risk Management. - BRM will explain the PA

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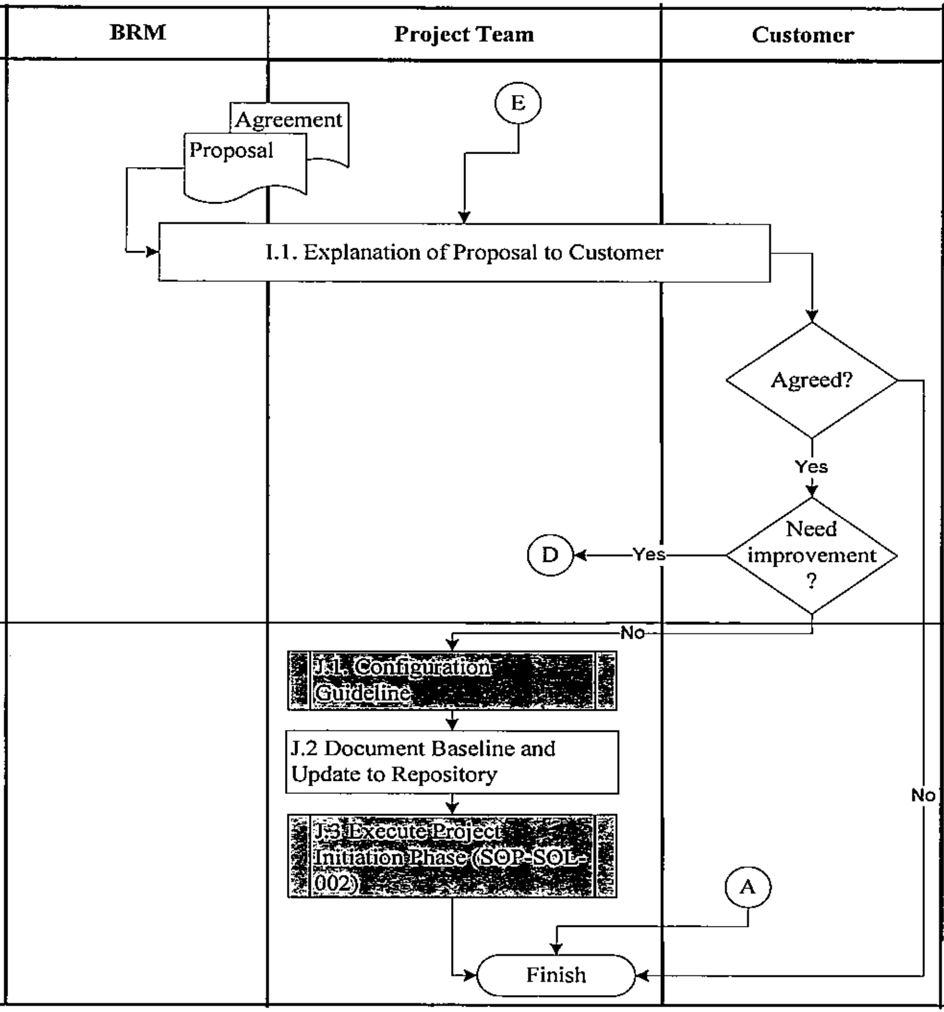
	QUALITY PROCEDURE			
	Document No.	**Document Name**	**Issued By**	
			CPC & QM Division	
	SOP-SOL-001	**PRE-SALES PHASE**	**Revision No.**	**Page No.**
			5.0	9 of 14



Process Phase	Process Asset/ Template	Activity Explanation
I. Explanation of Proposal to Customer	- Customer Reference from others reference	I.1. BRM making schedule to explain the content of proposal to customer. Before going to the discussion it is necessary to identify the decision maker and how to reach them. Based on this identification then strategy of explanation is defined. Such as in what detail level the explanation is required. Explanation to the customer become PM and BRM responsibility. Note: - If the customer doesn't agree than Pre-Sales is closed. Update the master list of project and identify our weakness and why customer does not agree with the proposal. - If the customer agree with our proposal but need improvement then project team should be identified the step that should be initiated.
J. Pre-Sales Closing	- Configuration Management Guideline	J.1. PM should learn the Configuration Guideline in how to work with project folder and project repository. J.2. All documents should be base-line and put in baseline folder. This document becomes reference for next step of process J.3. Procees the next phase, namely Project Initiation Phase.

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6. RULE AND STANDARD

6.1 INITIAL PRE-SALES ASSESSMENT

6.1.1. BRM should conduct initial Pre-Sales assessment to gather the information that is required for decision, whether to follow up the prospected project by submitting proposal, or stop the process.

6.1.2. BRM should use 'Initial Pre-Sales Checklist' to conduct the assessment.

6.1.3. BRM should submit the assessment result including information of customer profile & their readiness to implement the project to related Division Head of project team.

6.1.4. The Division Head should review the assessment result then assess the availability of the resources.

6.1.5. Based on the review result, Division Head & BRM should discuss to decide whether to follow up the project or not.

6.1.6. If it is decided to follow up the project, the Division Head should assign a member to be PM of the prospected project, and then lead the Pre-Sales processes in preparation of proposal/solution. Arrangement to customer and internal management will be lead by BRM.

6.1.7. BRM should lead further Pre-Sales process until project kick off. BRM should prepare a plan of Pre-Sales process include a schedule for preparing proposal and schedule for peer review meeting with BSI management.

6.2 REQUIREMENT DEFINITION

6.2.1 The customer requirements for a new project should be documented as RFP document. The RFP document should be prepared by customer, or if they cannot make the document, Project team and BRM should help them to prepare it.

6.2.2 The RFP document should include functional requirements and non functional requirements.

6.2.3 For non-functional requirements, at least 4 aspects should be identified ,

a. Reliability (the ability of a system or component to perform its required functions under stated conditions for a specified period of time)

b. Performance (how quickly the system should react to the user input)

c. Security (how the access permission to the system should be designed, protection from external intruder)

d. Usability (ease of use and learnability of a human-made object)

6.2.4 The requirements that is stated in the RFP should be analyzed and re-confirmed to customer in order to create proposal as response to the received RFP.

6.2.5 PM supported by SME should identify missing requirements, unclear requirements, contradicting requirement then re-confirm to customer.

6.2.6 Underlying constraints, assumptions and dependencies also should be identified which will help to assess project risks and prepare risk management plan.

6.2.7 Detail processes of managing the customer requirements are described in 'Requirement Management Guideline'.

6.2.8 Project team should get customer's validation of their requirements before continue to next process (project estimation to define proposed solution).

6.3 PRODUCT & VENDOR IDENTIFICATION

6.3.1 Product identification process should be based on the following consideration :

a. Re-Use, BSI will re-use the product if BSI owns the product.
b. Make, BSI will make the product by themselves, If BSI doesn't have the product but capable to make the product.
c. Buy, BSI will buy the product, if BSI doesn't have the product and not capable to make the product by themselves.

6.3.2 If we decide to buy the required product, process of vendor identification should be performed.

6.3.3 The process of product/vendor identification/selection should be based on list of BSI's vendors that is documented in BSI's project repository.

6.3.4 PM should coordinate with Supplier Manager to conduct process product/ vendor identification/ selection.

6.3.5 Detail processes of product/vendor identification are described in ***SOP-ADM-002 Purchasing Procedure.***

6.3.6 After the product/vendor has been identified , PM and Project Team should mapped compatibility for each product & related vendor (if required) as our solution by creating Compatibility Matrix document.

6.3.7 Compatibility Matrix document is used to check compatibility between each requirement items, both of hardware and software.

6.3.8 Procurement team will send quotation and draft of compatibility matrix checklist to vendor.

6.3.9 Related vendor should follow up the quotation and complete the compatibility matrix checklist that already sent by procurement team.

6.3.10 During vendor selection process, PM and Project Team should conduct discussion session/confirmation with each vendor/principal based on follow up result of compatibility matrix.

6.3.11 DAR document will used for product or/and vendor selection process.

6.4 DEFINE PROJECT APPROACH (TAILORING)

6.4.1 The methodology or approach to implement project should follow the defined BSI project methodology.

6.4.2 PM should refer the Project Methodology Manual and others guideline in organization standard process, policy and rules.

6.4.3 PM should analyze whether need to tailor the BSI project methodology or not to ensure it will meet the specific needs/requirements of planned project.

6.4.4 Tailoring the BSI project methodology can be triggered by the following reason:

a. Because of specific deliverables
b. Because of characteristics of products will be used.

6.4.5 The result of tailoring process should be implemented when developing the project plan (WBS, PMP).

6.4.6 Detail processes of tailoring the project methodology are described in 'Tailoring Process' guideline.

6.4.7 The tailored BSI Project methodology that is created by project team should be validated by QA before implemented.

6.5 RISK MANAGEMENT

6.5.1 PM should identify any risk that can be occurred in the project and also related mitigation and contingency plan.

6.5.2 The result of risk identification and related action should be recorded in Risk Management Log.

6.5.3 The Risk Management Log should be evaluated & updated during project implementation until closure.

6.5.4 The result of risk analysis & related action should be reflected in Project Planning (WBS), PMP, and Proposal.

6.5.5 Mitigation plan should be conducted immediately as planned to prevent the occurrence of risk.

6.5.6 Contingency plan should be executed if the risks being occcured to minimize the negative impact.

6.6 ESTIMATION PROCESS

6.6.1 The goal of estimation process is to identify needed resources & effort/mandays calculation for implementing the project. The needed resources include labor, equipment/infrastructures, materials and methods. Estimation process should be based on identified requirements, defined project methodology and defined risk assessment.

6.6.2 Estimation process should be conducted by using two approaches:

a. Based on activities by defining Work Breakdown Structure (WBS).
b. Based on assessment of complexity of works by using Function Point Analysis or Package Point Analysis.

6.6.3 Project Manager should compare the estimation result from both approaches then define the project effort. The effort based on activities in WBS will become effort/mandays to calculate the project cost.

6.6.4 The defined project effort/ mandays calculation should be used for calculating PA of project.

6.6.5 The calculated gross profit ratio should be reviewed & approved through peer review session.

6.6.6 Detail processes of project estimation are described in :

a. WI-SOL-005 Project Estimating Using Function Point Analysis.
b. WI-SOL-007 Package Implementation Estimating and Sizing using Package Point.

6.6.7 If there is a change of assigned resources or other changes that impact to project cost, the PA document should be reviewed & revised. (ex: in previous PA we estimate will use a junior consultant, but in actual the junior is not available so we should use a senior consultant).

6.7 PROPOSAL/AGREEMENT WRITING

6.7.1 PM and BRM should collaborate to prepare proposal of project as response to received RFP from customer. While BRM has accountability of preparing the proposal, PM should support the creation of proposal especially to compose the technical content (solution offered). BRM should more focus on commercial scheme and other aspects that is required to ensure it is easily understood by the customer.

6.7.2 The content and structure of proposal should be as follow:

a. Project background, define the background of propose project
b. Project objective

c. Requirement and solution

d. Scope of work, define the area of work/project operation more details

e. Project organization, the role and responsibilities of both parties project management members.

f. Project schedule, the timetable plan of to-do-list detail activities in the project.

g. Commercial scheme for external project or cost structure for internal project.

h. Approval sheet.

6.7.3 When writing the proposal, PM should ensure that it will be clearly understood by the customer.

6.7.4 The proposal should describe the final scope of customer requirements to be approved by the customer.

6.7.5 At the same time with writing proposal, other documents should be prepared:

a. Quotation

b. Agreement

6.7.6 The project price that is stated in proposal and agreement is 'estimated price' based on the defined scope. It can be changed following the project requirements and agreed by both parties.

6.8 PEER REVIEW

6.8.1 After draft of proposal finished, PM should coordinate with QA to conduct peer review to verify the completeness and the correctness of following documents:

a. Proposal

b. Risk Management

c. PA

d. WBS and mandays calculation.

6.8.2 Detail processes of reviewing the Pre-Sales documents are described in 'review process' guideline.

6.8.3 Peer review of Pre-Sales documents (proposal, risk management, PA, WBS) is a mandatory activity. BRM cannot submit proposal to customer until this activity is conducted.

6.9 PROPOSAL EXPLANATION & APPROVAL

6.9.1 When submitting the reviewed proposal to customer, PM also should explain the content to the customer, so we can ensure that they understand with the content.

6.9.2 Through this explanation, some adjustments can be done for the proposal as agreed by both parties.

6.9.3 If there is major change after explained to customer, the content of proposal should be reviewed through peer review session.

6.9.4 The final draft of proposal should be signed by both parties as written contract/commitment between BSI and customer.

6.9.5 The customer requirements stated in the agreed proposal should be baselined.

6.10 REQUIREMENTS MANAGEMENT

6.10.1 The scope of proposal will become initial item in the RTM document. PM and Project team shall provide initial RTM during Project Initiation phase after Project Kick Off. Fill in the RTM after define the To-be-Design document in Requirement Analysis phase.

6.10.2 This RTM should be monitored, control and updated during the project.

6.10.3 If during project execution there is an initiative to change the requirements, ex: scope, resources, schedule etc as agreed in the approved proposal, it should be managed through Request For Change (RFC) document. The RFC should be approved by Project Manager of both parties. Further explanation of process the change request is described in 'Change Management Guideline'.

7 RELATED DOCUMENTS

7.1 Project Methodology Manual

7.2 Requirement Management Process Guideline

7.3 Purchasing Process Guideline

7.4 Tailoring Process Guideline

7.5 Review Process Guideline

7.6 Risk Management Process Guideline

7.7 Project Estimating Using Function Point Analysis Working Instruction

7.8 Project Estimating and Sizing Using Package Point Analysis Working Instruction