

Success Story

A case study about exceptional value we provided to our clients



COTS Integration

OVERVIEW

A large agency had a need to automate the processing of reimbursements for employees' travel expenses. Each year, tens of thousands of employees incurred expenses for official travel. The entire process of travel expense reimbursement was performed manually, and was slow, expensive, and prone to errors. When the decision to automate the process was made, Johnston McLamb was brought in to select a COTS product and implement it. Johnston McLamb evaluated requirements, selected a product, completed the system integration, and supported all facets of the system operation thereafter. As a result, errors and delays have practically been eliminated, the time to process travel vouchers has been reduced by several days, credit card delinquency rates have been significantly reduced, and the number of travel managers has been reduced from 90 to fewer than five. The travel reimbursement application has won an Excellence.gov award and the agency has won a Travel Manager of the Year award.

JOHNSTON MCLAMB'S COTS INTEGRATION PRACTICE HELPED THIS AGENCY:

- Gather and document detailed requirements
- Formulate COTS product evaluation/selection criteria
- Evaluate candidates and select the best product
- Select and implement hardware
- Integrate the COTS product with other applications
- Perform acceptance testing, user training, and rollout
- Provide ongoing support and enhancements

THE NEED FOR IMPROVEMENT

When employees of this large agency traveled on official business, they charged major expenses such as air fare, hotels, and rental cars on their own personal credit cards and then requested reimbursement at the conclusion of each trip. Therefore, it was important to expedite payments and at the same time greatly streamline the process of requesting reimbursements, approving those requests, and making payments. It was clear that manual processing of travel reimbursement requests was no longer acceptable. The agency decided that a COTS product for managing travel expenses would be the best answer.

DETERMINING REQUIREMENTS

Johnston McLamb was given the task of finding the best COTS product to meet the agency's needs. We began by analyzing and documenting the agency's business requirements and gaining a full understanding of the business problems to be solved. Scalability was of particular importance, since the agency anticipated that as many as 100,000 users would eventually use the travel expense application. Clearly this was to be no ordinary COTS implementation. After gathering and documenting requirements, Johnston McLamb determined "must have" features and ranked all the other desired features in terms of importance. We also determined security, performance, and scalability requirements and documented the requirements for integration with other systems. We concluded our requirements gathering by ranking them in order of importance to the client. We identified all "must have" requirements, then assigned a weighting factor to the remaining requirements.



SELECTING THE RIGHT PRODUCT

Our next challenge was to survey the marketplace and find the product that was the best fit for the client's requirements. We prepared a detailed plan that covered all phases of COTS identification, evaluation, and selection. The plan detailed all the tasks and dependencies, task ownership, and key milestone dates. We established a schedule for regular status reporting to make certain that the project stayed on track and that any deviations in schedule would be quickly discovered and resolved.

Our research found a number of COTS products for managing travel expenses, but only a few that were robust enough to handle the demands of an organization with an extremely large number of users and similarly large transaction volume. We contacted the vendors and asked them to describe how well they satisfied the requirements:

- Satisfy "right out of the box" with no changes necessary
- Satisfy by using built-in configuration options
- Can satisfy with custom add-on modifications
- Can only satisfy with core product modifications
- Cannot satisfy

We also asked vendors to provide total cost of ownership information that encompassed the costs of licenses, installation and configuration, customization, integration with other client systems, hardware, data conversion from legacy systems, training, and ongoing support.

After evaluating vendor responses, we quickly narrowed down the vendors to two candidates with no clear winner. So we invited the two finalists to participate in a pilot evaluation project. They installed their products at the client site, configured the products, integrated them with some of the client's systems, and trained the pilot participants. The pilot ran for a month, during which time a select group of users submitted actual travel expense reports to each system. We also conducted load testing to determine how well each product could perform under the anticipated transaction volume, how well they scaled and could handle peak loads.

At the end of the pilot project, the winner was evident. We worked closely with the client to plan and carry out the next stage, which was to lead the integration team.

SYSTEM INTEGRATION AND SUPPORT

Johnston McLamb was responsible for all phases of the integration of the COTS product into the client's business and technical environment. We worked with both the client and the vendor to prepare a detailed integration and rollout plan. One of the biggest challenges was how to implement a travel expense management system for a nationwide community of over 30,000 users with an expected growth to over 100,000.

Johnston McLamb helped the client prepare a phased implementation plan for starting with a subset of the user community and then scaling up to full volume over time. We were responsible for leading the hardware acquisition, setup, and performance monitoring. We assisted with the establishment of a Tier 1 Help Desk and provided Tier 2 and 3 support. We also worked closely with the client to establish and enforce security rules and to establish necessary user roles such as traveler, approver, and administrator.

Since the initial implementation, Johnston McLamb has been responsible for all facets of system support. We monitor all data feeds on a daily basis and correct problems immediately. We fix any performance problems that occur. We continue to provide Tier 2 support. As the vendor announces patches and version upgrades, we evaluate them, work with the client to plan their implementation, and then install them and verify that the system is working properly. We also apply all updates to the standard per diem rates for both domestic and international travel.

REALIZING THE BENEFITS

The benefits of the COTS product integration have been substantial. To date, more than 100,000 travelers have filed more than 3.8 million expense reports worth more than \$1.25 billion. The number of travel managers needed has been reduced from 90 to fewer than 5. Errors on travel expense reports and delays in processing have practically been eliminated. Users are normally reimbursed within 2-3 days instead of 1-2 weeks or more as before. Travel card delinquency rates have dropped from about 5 percent to 2 percent. With this virtually paperless system, travel expense report filing, expense calculations, approvals, and payments to both the traveler and the credit card company are fully automated. Approvers even have the ability to review and approve expense reports using their BlackBerry handheld devices when they are not in the office.

These benefits have not gone unnoticed. The Industry Advisory Council's (IAC) eGov Shared Interest Group, in partnership with E-Gov and the Federal CIO Council, selected the system as an award winner within the Excellence.Gov awards program. It was chosen for demonstrating excellence in E-Government innovation. Furthermore, the client won the prestigious *Travel Manager of the Year* award from Government Executive Magazine. The Government Executive judges singled out this project for its large scale and because it is based on commercial best practices.

Contact Johnston McLamb today at jmsales@johnstonmclamb.com to learn more about how our COTS Integration practice can bring these same benefits to you.