Getting started with **Requirement Manual**

My ContractManager is your intelligent virtual assistant for all your contract management needs. Manage your entire contract life cycle, including email traffic, meetings, tasks, documents, requirements, contract changes, and automated performance updates.

Welcome to MyContractManager, your digital assistant to manage your contracts effectively and save more time! It contains 7 modules in total:

This guide is designed to provide documentation for people who will use this tool on a day-to-day basis. This document can be read by any user.

Link to example powerpoint
Bid/Contract management powerpoint

Contents

1. Overview of levels of contract management

This chapter explains the principles of Contract Management. First of all it describes the different audiences, guidelines for multi-contract management, levels of maturity and typical business questions.

1.1 Who benefits from MyContractManager

- MyContractManager is mostly used in the service industry in a Business to Government (BtoG) setting.
- You are a Contract Manager who wants to assure contract compliance and agreements with your supplier(s)
- You are a Supplier / Service Provider demonstrating and communicating progress to your Client
- We distinguish between:
    - Single Contract Management, ie large complex contracts and multiple stakeholders
    - Multiple Contract Management, ie many suppliers, less complicated contracts

MyContractManager is suitable for different Contract types & roles

	Contract Manager	Supplier/ service provider
Single Contract Management	✔	✔
Multi-Contract Management	✔	

1.2 Effective multi-contract lifecycle management

Managing contract life cycles in a multi-contract environment requires a strategic and systematic approach. Here are some guidelines to help you effectively manage contract life cycles in such a setting:

Centralized Contract Repository: Establish a centralized contract repository to store all contract documents. This helps in easy access, version control, and ensures that all relevant stakeholders have access to the latest contract information.

Clear Contract Policies and Procedures: Develop and communicate clear policies and procedures for contract management. Ensure that all team members involved in contract management understand and adhere to these guidelines.

Standardized Templates and Processes: Use standardized contract templates and processes to streamline contract creation and execution. This helps in maintaining consistency across multiple contracts and reduces the risk of errors.

Automated Contract Management System: Implement an automated contract management system to enhance efficiency. Such systems can help with document tracking, milestone monitoring, automated alerts, and reporting, making it easier to manage a large number of contracts simultaneously.

Risk Management: Identify and assess risks associated with each contract. Develop strategies to mitigate these risks and regularly review risk management plans to ensure they remain relevant throughout the contract life cycle.

Contract Audits and Reviews: Conduct regular audits and reviews of contracts to ensure compliance with terms and conditions. This is particularly important in a multi-contract environment where oversight may be more challenging.

Contract Performance Monitoring: Implement a robust system for monitoring contract performance. Track key performance indicators (KPIs) and regularly evaluate whether the contract is meeting its objectives. Address any deviations promptly.

Communication and Collaboration: Foster effective communication and collaboration among stakeholders involved in contract management. This includes legal teams, procurement, project managers, and other relevant parties. Regular meetings and status updates can facilitate better coordination.

Training and Skill Development: Provide training for contract management teams to ensure they have the necessary skills and knowledge. This is especially important in a multi-contract environment where the complexity of managing various contracts simultaneously may require specialized expertise.

Renewal and Expiry Management: Implement a proactive approach to contract renewal and expiry management. Establish processes to assess the ongoing relevance of contracts, negotiate renewals, or terminate contracts that are no longer needed.

Continuous Improvement: Continuously evaluate and improve your contract management processes. Seek feedback from stakeholders, conduct post-contract reviews, and identify areas for improvement to enhance overall efficiency and effectiveness.

Legal and Regulatory Compliance: Stay abreast of changes in laws and regulations that may impact your contracts. Ensure that all contracts remain in compliance with relevant legal requirements throughout their life cycles.

Performance Metrics and Reporting: Define performance metrics for contract management and regularly generate reports to assess the overall health of your contracts. This information can be valuable for strategic decision-making.

Scalability: Design your contract management processes to be scalable. Ensure that the systems and procedures you put in place can accommodate the growth or changes in the number and complexity of contracts.

By implementing these strategies, you can enhance your ability to manage contract life cycles effectively in a multi-contract environment, reducing risks, improving compliance, and optimizing overall contract performance.

1.3 Levels of maturity in Contract Management - Multiple Contract Management

We distinguish four main levels of maturity in multiple contract management, level 1: basic, level 2: contract life cycle, level 3: contract performance, level 4: professional contract management.

Level 1: You have a basic contract calendar showing (captured, contract calendar)

- Start and end date of contracts, optionally milestones within the contract
- Who is the contact for the contract (contractor), who is the contact on the owner side
- Basic description of the contract
- Actual contract attached or linked

Level 2: You manage the contract and management tasks together (contract life cycle)

- Level 1 +
- Task management like prepare for new contract, check work is done is described and executed centrally
- Meetings with contractor (worker) is well documented, company details about contractor are captured
- Contract value is captured

Level 3: You manage the delivery performance against agreed performance numbers in the contract (contract performance)

- Level 2+
- KPI's are documented and performance captured in measure moments during the contract
- Project delivery is monitored
- Stakeholder management is active (all meetings, actions, agenda, decisions are captured and managed)
- Why the work is outsourced and what KPI's should be affected are well documented and managed
- Links to external tooling is captured centrally, making it easy to navigate to detailed data
- Your business is monitored via OGSM to clearly document what you want, what numbers matter to you and what is being done to maintain or change those numbers.

Level 4: Professional contract management

- Level 3+
- Risk management
- Supplier management (track spend across contracts to limit exposure risk)
- Contract changes are managed per paragraph / section and linked to requirements and projects
- Compliance management
- Inter contract dependencies are documented
- Email conversations are captured
- All work and documentation is captured in one central area

1.4 Business questions for Contract Managers

Below you find a number of key questions for Contract Managers who manage multiple contracts. These can all be answered with the use of MyContractManager:

- Who do I have contracts with?
- What are their contact details?
- When are my contracts needing to be renewed / tender?
- Gantt showing contracts (start/end/milestones)
- What process do I need to follow to have a smooth contract management process
- Can a current contract be extended?
- Can it be extended with the current contractor? #contracts, #total contract amount per contractor?
- What is my financial exposure to this contractor?
- What are the terms of the contract and is the contractor delivering according to agreement?
- How can I store and fix complaints against the contractor
- [optional] how is the contractor dealing with contract risks?
- Are the contract milestones being achieved?
- Are the performance indicators on-track?
- How many different contractors do I have per area?
- I want to be able to see all meetings, agreed actions, decisions per contract and per contractor.

2. Requirements Management

The requirement management feature in our product empowers users to create and organize their project requirements efficiently. The unique configurability of the tiles system allows users to tailor their requirement tracking experience according to their project's specific needs. This user manual section will guide you through the process of creating and managing requirements using the configurable tiles.

Requirements are regularly updated during a contract period: some requirements become technologically obsolete, others are expanded. New requirements are also added during the contract period at the request of stakeholders. In this chapter of the manual we describe the steps for creating Requirements and making them manageable.

Identify the goal

What's the objective of the contract? (Pruning grapevines to improve wine quality and quantity.)

Why is pruning necessary for achieving this goal? (Pruning promotes healthier grape growth and better grape quality.)

How can I achieve that?

1- Set Clear Objectives: Define the aim of the contract – to enhance wine quality and quantity by pruning grapevines annually.

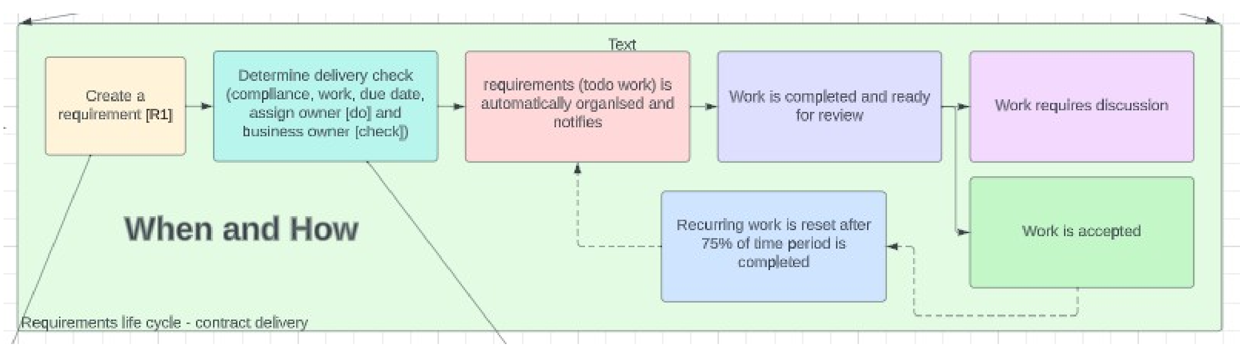
2- **Plan Ahead:** Determine the best time for pruning based on vine dormancy and local climate.
3- **Allocate Resources:** Arrange the necessary tools, personnel, and equipment for the pruning process.
4- **Choose Pruning Method:** Decide on the appropriate pruning technique for promoting vine health and growth.
5- **Execute Pruning**: Perform annual pruning sessions as per the chosen technique.
6- **Monitor Consistently:** Regularly check pruned vines for proper cuts, vine health, and signs of disease.
7- **Adapt as Needed:** Modify pruning methods if results aren't as expected and make necessary adjustments.
8- **Document Everything:** Keep records of each pruning session, dates, methods, and improvements observed.+

In this part, I will explain how contracts are carried out. I'll show you how to create requirements using our tool and effectively handle them to get the best outcomes. We'll also show you how to keep track of completed work. This will cover the entire process of delivery contracts, from start to finish.

Let's use the example of pruning grapevines for making wine. The idea here is to trim the grapevines regularly to achieve the best wine results.

To get started, the first thing you do in our tool is to create a requirement and define the necessary details.

Technical side of requirements

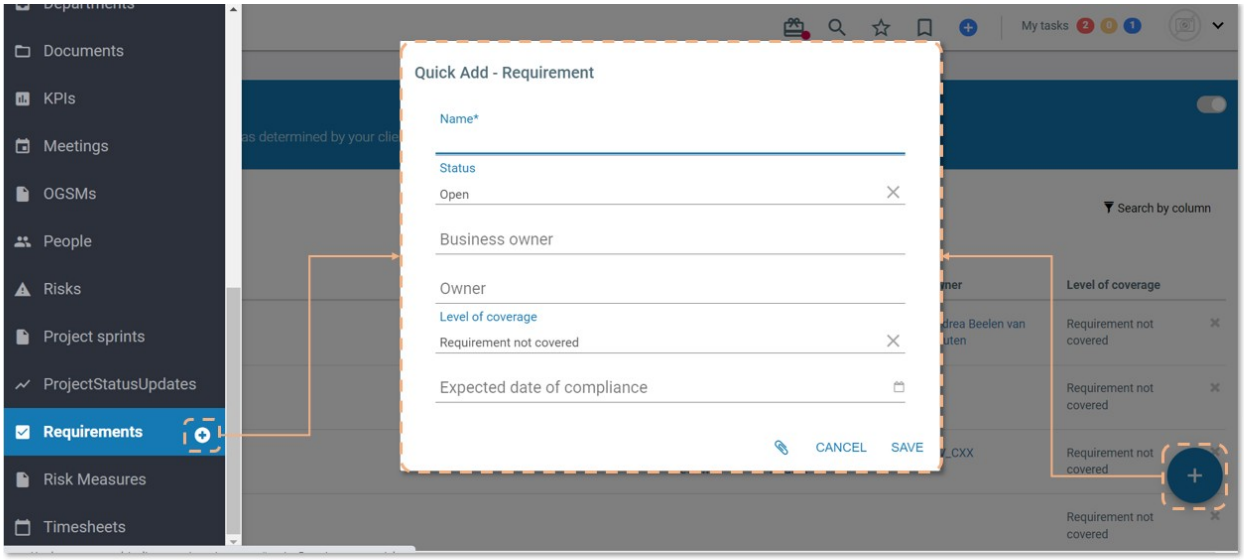


1- Create a requirement

In this section, we will walk you through the process of generating a requirement and outline the subsequent steps involved. Let's use a practical example: **"Yearly Pruning of Vines to Enhance the Quality and Value of Wine."**

- Hover your cursor over the 'Requirements" tab in the menu. As you do so, a '+' icon will appear, providing you with a quick option to create a new requirement.

- Click on the name of the requirement you wish to create. This action will open a list of existing requirements. In the bottom right corner of the screen, you will find a '+'' button. Clicking on this button will trigger the same popup window, enabling you to input the details of the requirement.



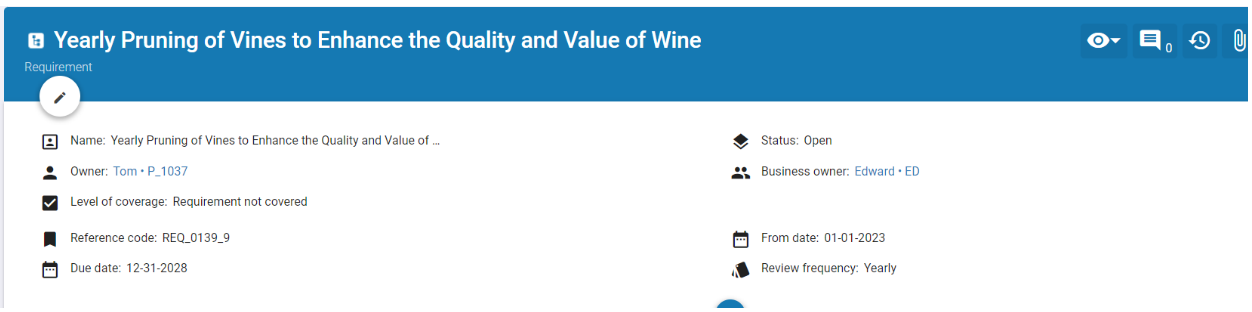
When you access the popup window to define a requirement, ensure that you complete the following fields:

- **Requirement Name**: Enter the descriptive title for the requirement. In this case, use "Yearly Pruning of Wine to Enhance Quality and Value."
- **Status:** The default status is set to "Open." This signifies that the requirement is active and pending further actions.
- **Business Owner:** Designate the individual responsible for reviewing the pruning process of the grapes. This person ensures that the pruning is carried out consistently and accurately.
- **Owner:** Initially, this field should contain the person who will be executing the task. In your specific scenario, Tom will be responsible for performing the grape pruning.

Once you have filled the above information hit save and then open the overview page of the requirement created by clicking on the name of the requirement.

Additional information required to ensure that the requirement functions as expected:

- **Review Frequency:** Select the desired frequency for task repetition. (Yearly)
- **Start Date:** Specify the commencement date for the task. (01/01/2023)
- **End Date**: Indicate the conclusion date for the task. (31/12/2028)
- **Business Owner:** (Edward)
- **Owner:** (Tom)
- **Status:** (Open)

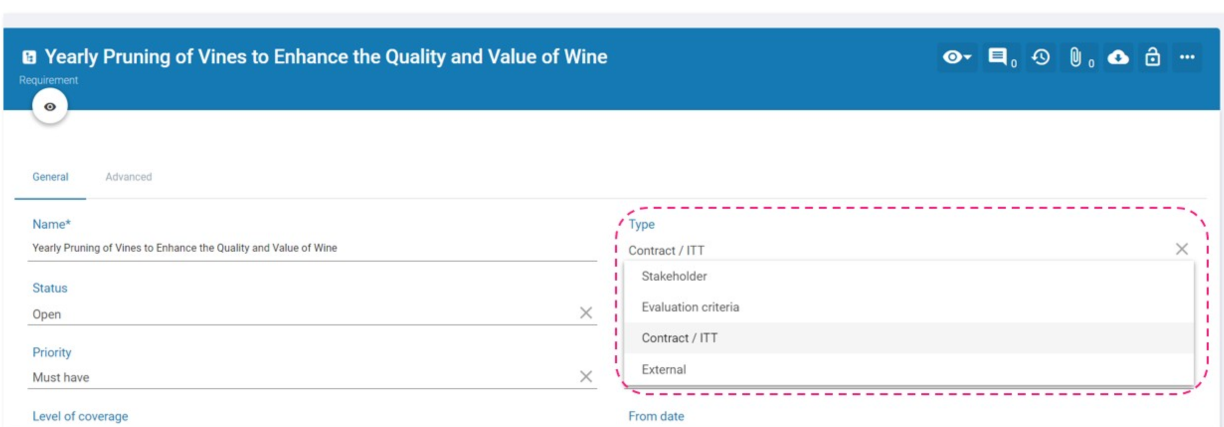


By using these information added in the tool, we will be able to manage the progress of the requirement perfectly.

2- Manage requirements in out tool

Requirement types:

- **Evaluation criteria** (Tender process = selection)
- **Contract/ITT** (Tender process = requirements how to submit an offer) Not part of the contract
- **External/Committed Obligations** = Mandatory external requirements, ie. Don't use any form of bird trapping to stop them picking your grapes, or cannot use pesticides a, or b, or c cannot use ground or river water between date a and b for any purpose. Another example. When you drive a car you need a valid driver's license (reminder)
- **Stakeholder** = What I want done and how I will evaluate completion / compliance

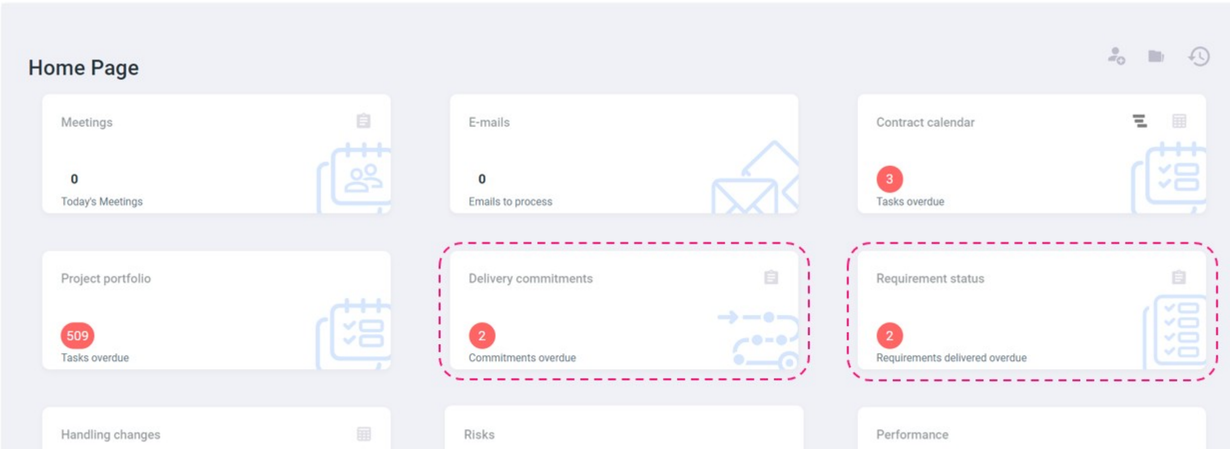


Requirement flow since the created to the end of the contract

if user enables the mailing of the requirement, our tool will help you remind of the time when to “Prune the grapes”

3- Dashboard page

On the dashboard page, we've allocated two separate sections or tiles specifically for requirements: "Delivery Commitments" and "Requirement Status."

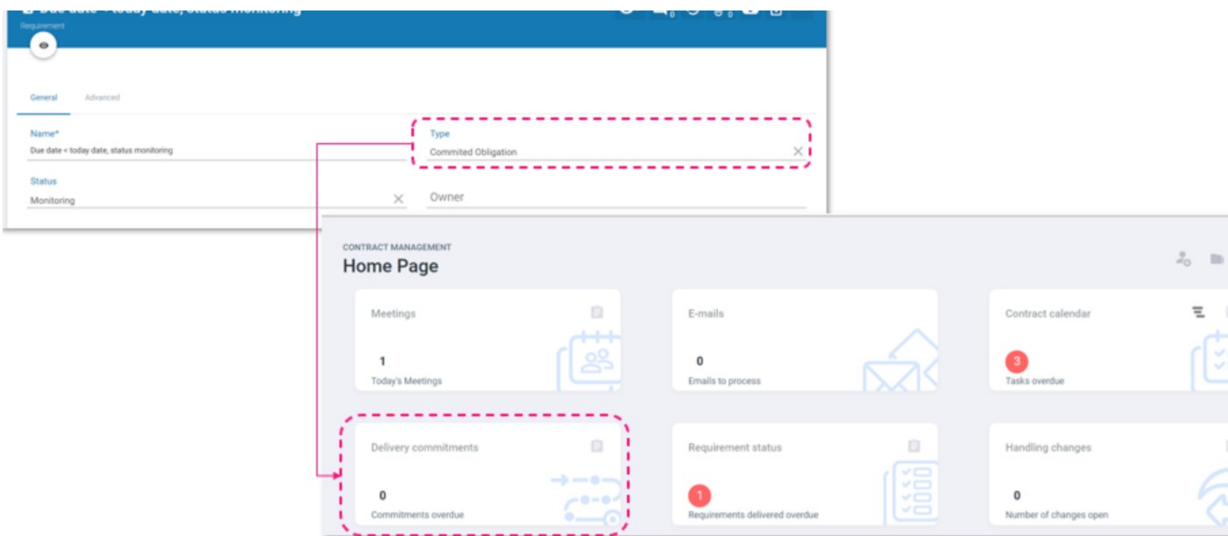


To effectively distinguish between these two tiles and showcase different sets of requirements, it is crucial to configure the specific requirements accordingly.

Delivery commitments:

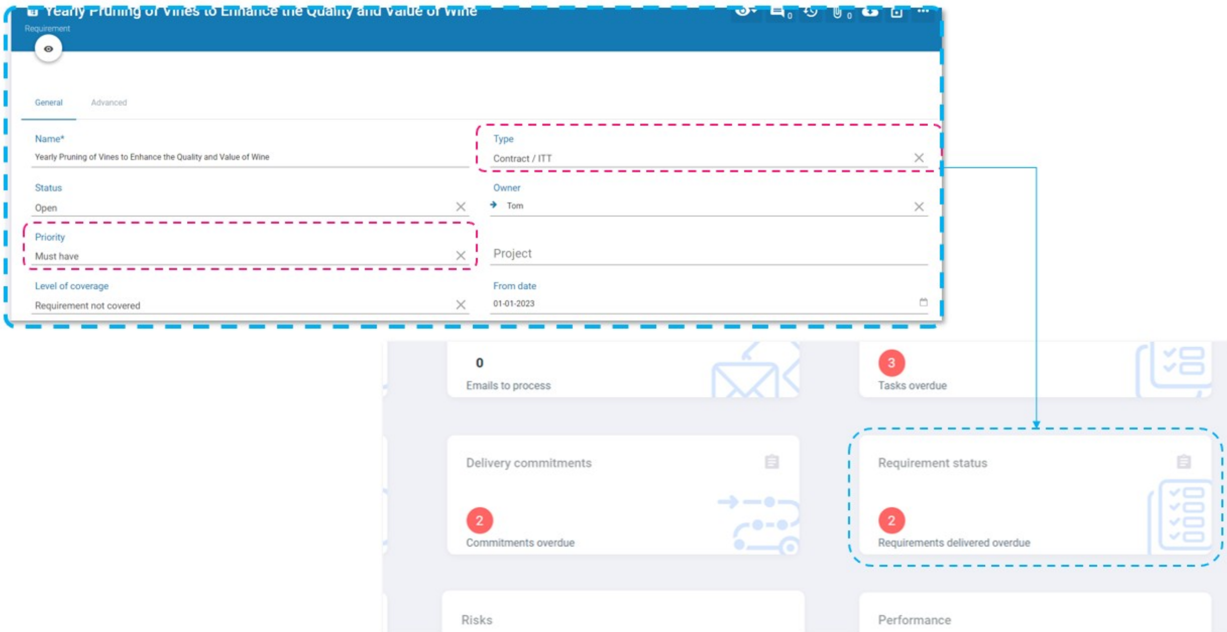
What are the requirements in “Delivery commitments”

When you choose the requirement type as "Committed Obligations," this particular requirement will become visible within the "Delivery Commitments" tile.

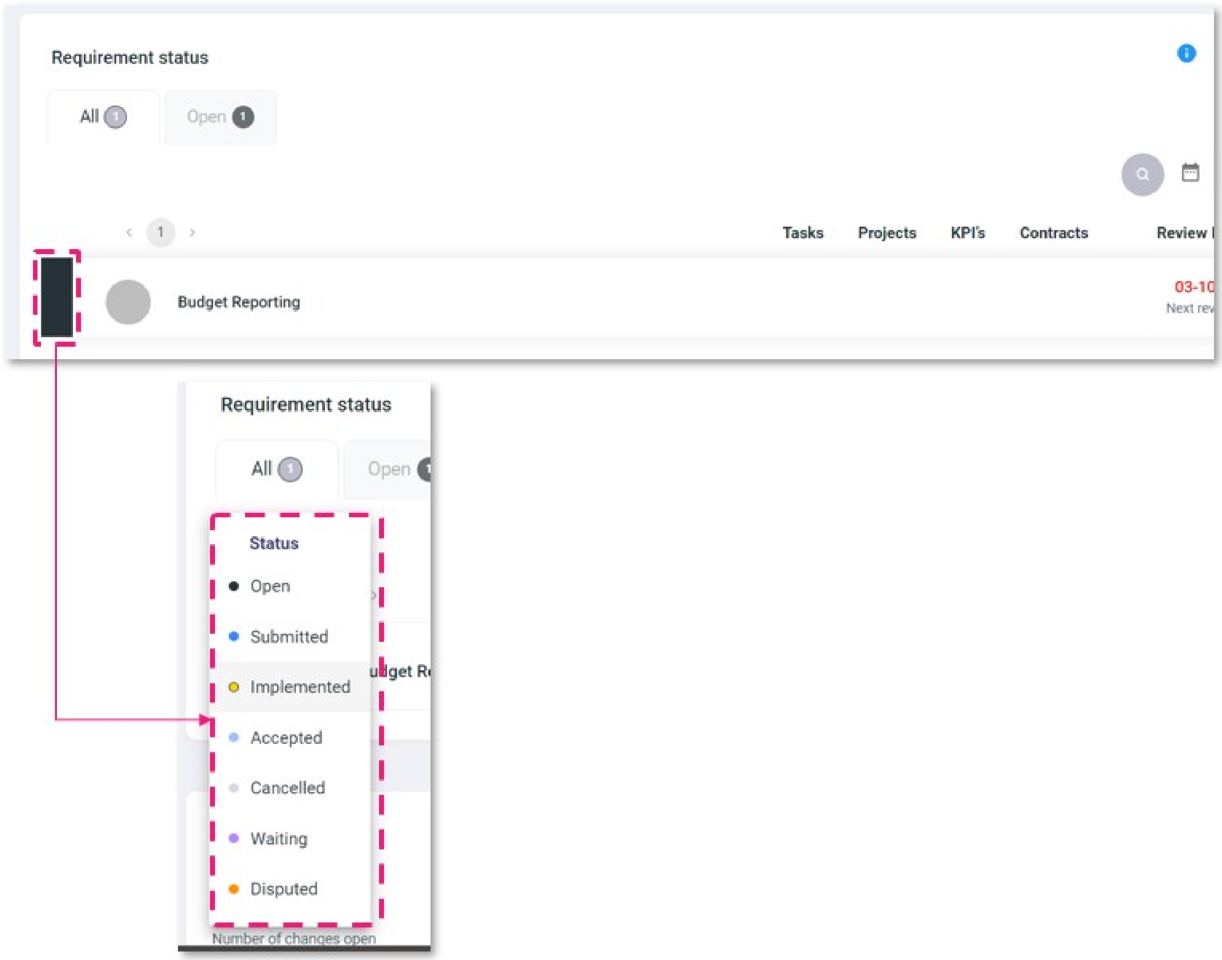


Requirement Status

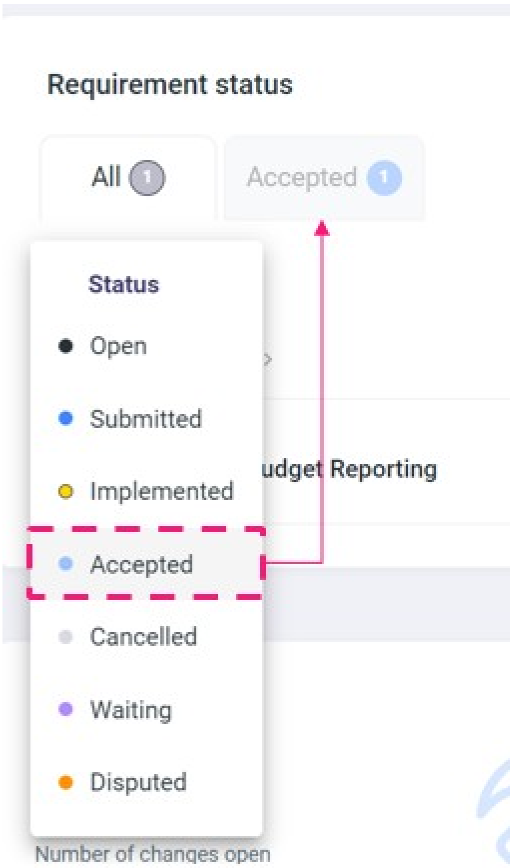
Conversely, within the requirement status tile, we showcase requirements characterized by the type "Contract ITT" and the priority designation of "Must Have."



You can change the status of a requirement by simply clicking on its color bar and selecting the desired status from the options provided. Once the status is chosen



Once a status is selected, the requirement will automatically move to the corresponding tab based on its status.



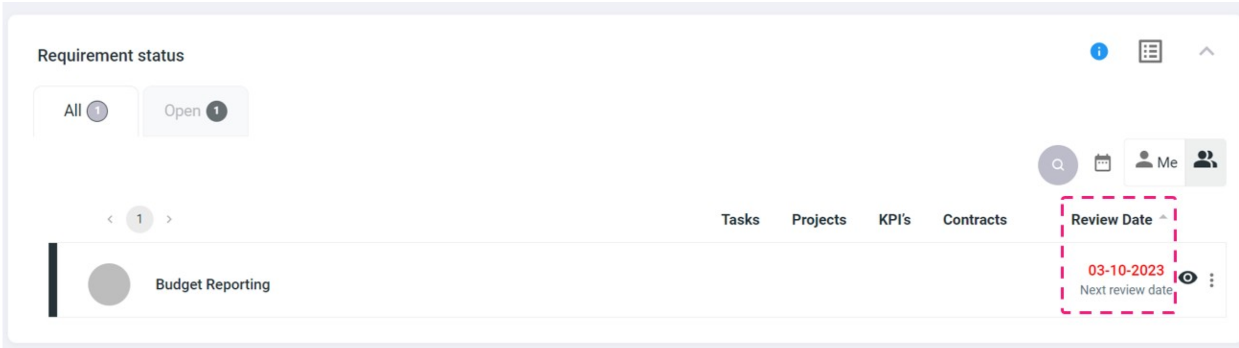
Requirements review date

The tile also displays the requirements for the next review date. By default, these requirements are listed in ascending order. If you prefer to view them in descending order, simply click the icon next to the review date, and the list will reorder according to your preference.

The next review date is displayed as follows:

- If a requirement has a frequency and a next review date, the next review date will be shown.
- If there is no "Next review date," the end date of the requirement will be displayed.
- If neither a next review date nor an end date is available, the field will remain empty.

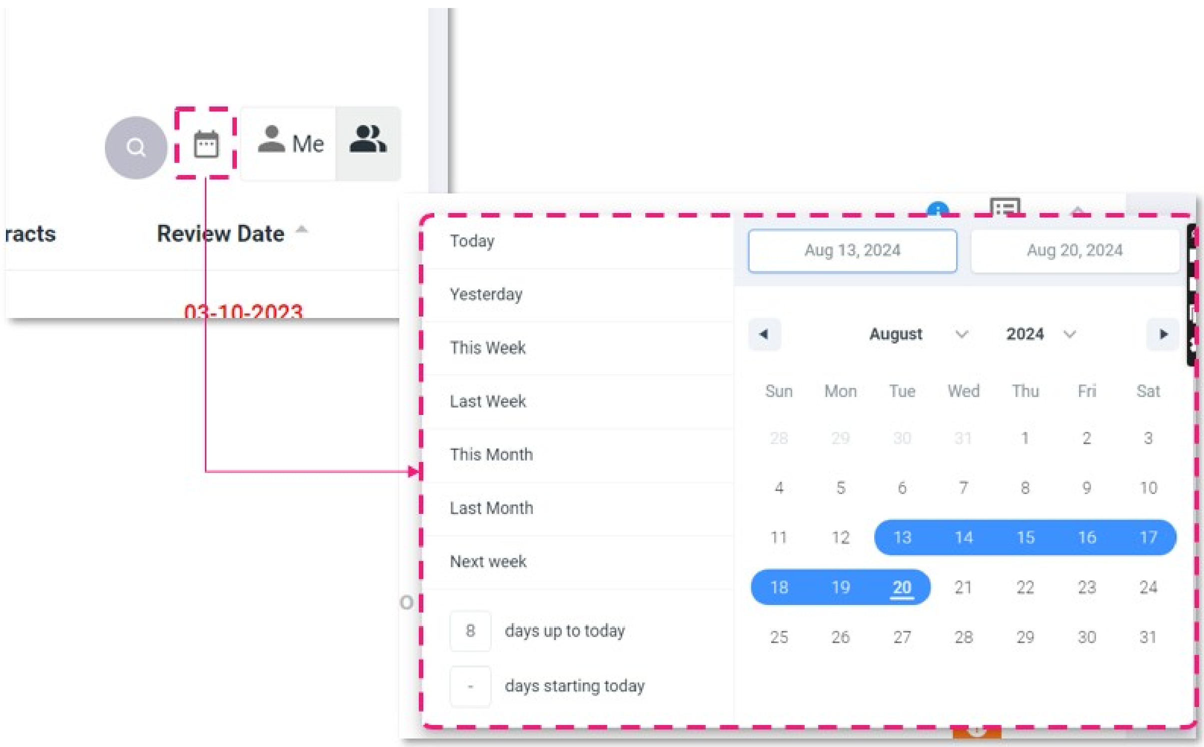
If the due date is in the past, we will highlight the date in red so it is more visible for you to know that you need to take action.



4- Filter options

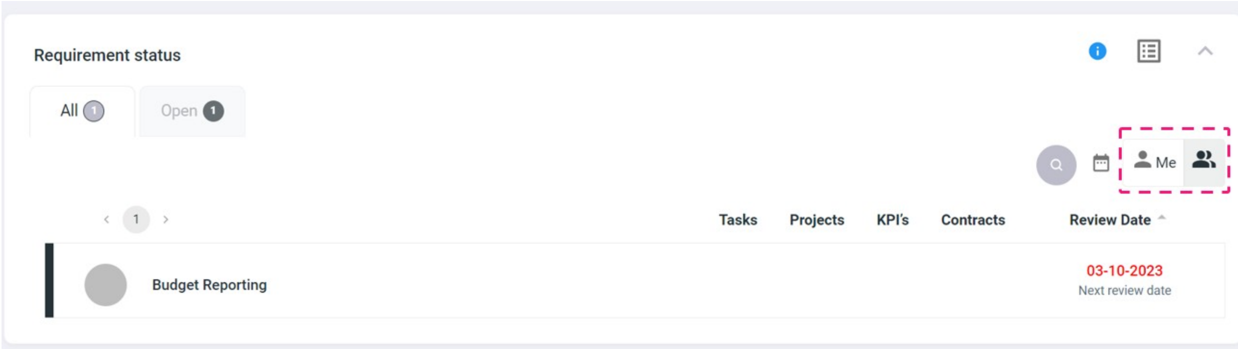
Date range

You can filter by a specific date range by selecting one of the suggested options on the left or by manually choosing a start and end date. Once the range is selected, all requirements with a due date or a next review date within that range will be displayed.



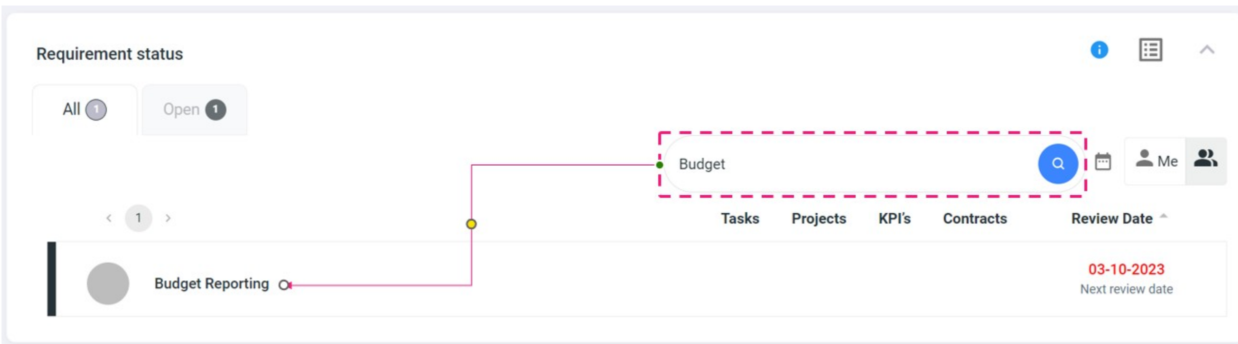
“Me” and “All” filters

By default, all requirements are displayed. However, if you click on the "Me" filter, only the requirements for which you are the owner will be shown.

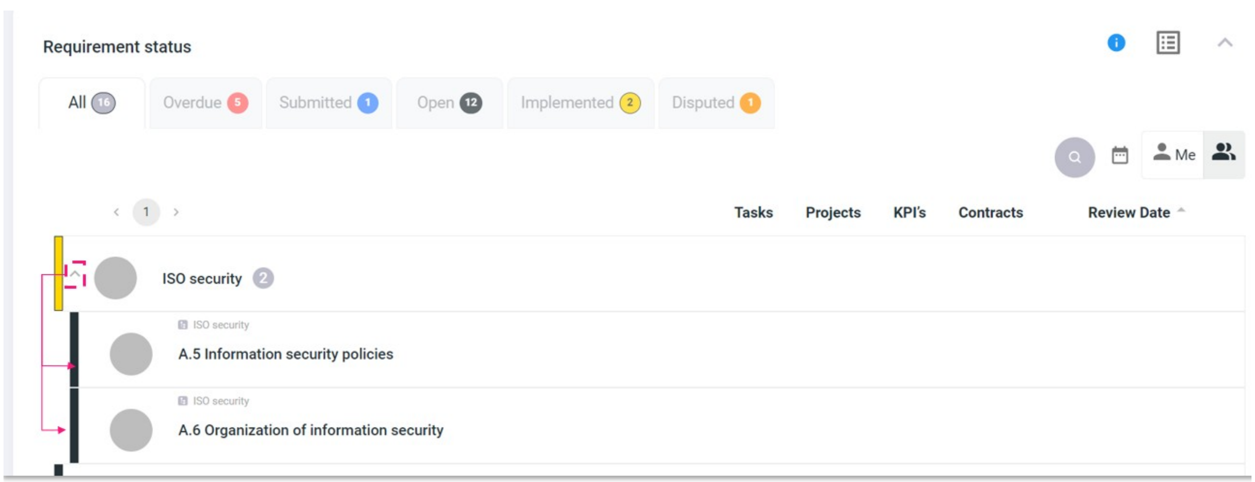


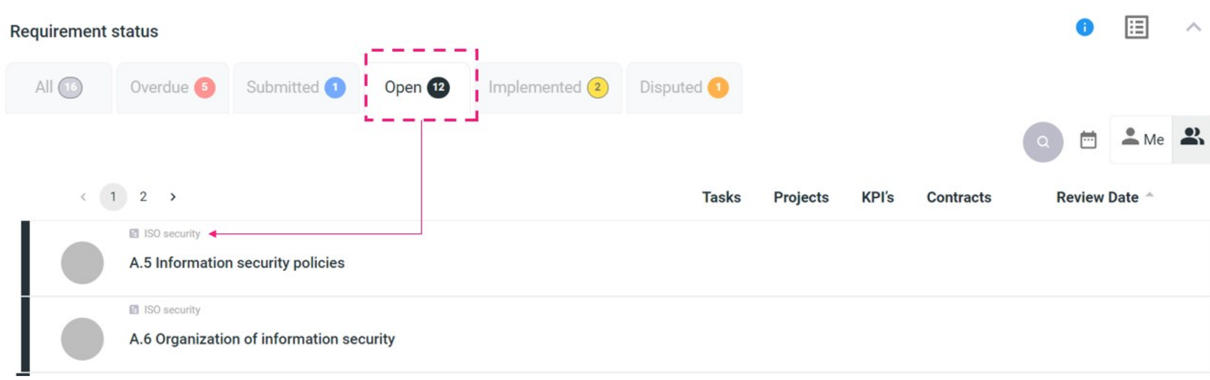
Search

Next to the other filters, you'll find the search icon (loop icon). Clicking on it will open a search field, allowing you to search for a requirement by name from the list.



If a requirement has child requirements, they will be displayed under the parent requirement in the "All" tab. In other tabs, the child requirements will appear separately but will indicate the name of the parent requirement.





5- Contract calendar explanation

In this tile we are showing projects that have reason: **Process** and we show only tasks inside that are overdue