



Client Snapshot Internal Revenue Service (IRS)

Chevo Makes Program Management Practical for the IRS

As the “flagship” of the Internal Revenue Service’s (IRS) Modernization efforts, the Customer Account Data Engine 2 (CADE2) is a highly visible and strategic program. Planning, managing, and monitoring delivery and performance on a complex, multi-million dollar program such as CADE2 is an enormous task.

BUSINESS CHALLENGES

To address the dynamics of the program, CADE2 needed consistent frameworks, processes, and artifacts to:

- Create and maintain the focus of a Program-wide strategy
- Develop program-level requirements, solution architecture, and transition strategy
- Centralize management of budget, schedule, and scope while addressing the needs and expectations of 40+ stakeholders.

The Basics Weren’t Easy – The process of creating a Work Breakdown Structure (WBS) and an Organization Breakdown Structure (OBS) were not universally understood or accepted. Nor was the concept and use of Control Accounts and Control Account Managers (CAMs). Yet all of these “basics” were prerequisites to the creation and management of program budgets and Integrated Master Schedule (IMS).

Garbage In-Garbage Out – Estimating was not performed using a standardized structure and common assumptions, and estimates were not created by control account and WBS element. This reduced the accuracy and value of these planning inputs from CADE2 Delivery Partners.

Haphazard Reporting – Individual Delivery Partners reported actuals in different ways and on differing schedules. As a result, significant work was required to translate reported information into a common, usable format, and reporting at any given moment could be missing input from one or more Delivery Partners.

Lack of Visibility – Not having common understanding of the basics, good data inputs, and inconsistent reporting practices made it difficult when assembling a complete, accurate picture of program status, let alone enable effective decision-making.



INDUSTRY:

Federal Civilian
Taxation Management

SERVICES DELIVERED:

STRATEGIC MANAGEMENT
 Business Process Optimization
 Organizational Change Management

PROGRAM/PROJECT MANAGEMENT
 Schedule & Earned Value Management

*“I have used **Chevo** again and again, and have recommended them for other jobs — with equally satisfied customers.”*

Ann Junkins, IRS
Client Satisfaction Survey

CHEVO SOLUTION

Taking a bottom-up approach, **Chevo's** program management consultants utilized their insights and lessons learned from CPIC, schedule management, cost estimation, budgeting, expenditure reporting, and Earned Value Management (EVM) to craft a Schedule and EVM (S&EVM) Process. Under development and enhancement for more than three years, **Chevo** refined and tailored its S&EVM Process to fit the culture, embedded methodologies, standards, and legacy systems of the IRS.

Highlights of the S&EVM process:

Common Terminology – Defined terminology understood and agreed upon by all parties

Delivery Partner Agreements – Standardized agreements and estimation forms between CADE2 and its partners to eliminate inconsistencies

Regular Updates – Created a weekly update pattern with tools to simplify and standardize reporting

Management Reporting – Created weekly reports for executive decision-making, such as Critical Path Summary, Two Week Look Ahead, and Cross Project Dependency (CPD) Log

EVM Tool Linkage – Integrated process with IRS's latest EVM tool to report EVM across the program or on individual project.

In addition to CADE2, this S&EVM process is utilized on the Customer Account Data Engine (CADE), Enterprise Security Audit Trails (ESAT), and Affordable Care Act (ACA) programs, representing the IRS's top three strategic programs. **Chevo** also leverages this process at other client agencies.

OUTCOME

The result of these efforts has been improved planning, reporting, and visibility into "true" program status while creatively addressing the bottlenecks and encumbrances that have affected EVM reporting at the IRS and many other civilian agencies. **Chevo's** approach tackled the low-level, detailed issues as a means to resolve highest level reporting and governance issues. level reporting and governance issues.

"I have been impressed with **Chevo's** work ethic since our first encounter. They have been very supportive of my work requirements and have helped me and my staff achieve our best."

Dennis Thompson, IRS
Client Satisfaction Survey

ABOUT CHEVO

Chevo Consulting, LLC (**Chevo**), is a Women-Owned Small Business (WOSB) that helps **change** and **evolve** federal agencies and Information Technology (IT) programs through practical implementation of unbiased advice. We are trusted advisors and practitioners in strategic, portfolio, program/project, and financial management.

Learn how **Chevo** can help your federal agency or IT program **change** and **evolve** at Info@ChevoConsulting.com.

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