

**(Insert Your Company Name and Logo Here)**

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**TenStep Project Management Process   
License Recommendation**

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Prepared by: xxxxxxxxx

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# Background

Modify this section with some context setting information such as your business need and why you are looking at using TenStep products.

# Cost Benefit Analysis

We recently sent a request to TenStep, Inc. to validate the pricing of TenStep licenses for our organization. It was surprising how inexpensive the licenses are given the value that we receive in return. The approximate total cost of the company license is $XXX.XX. There is an additional maintenance fee of 15% of the total cost payable after the first year but this amount is fairly trivial to make sure that we continue to receive all methodology updates.

The cost-benefit analysis is pretty simple and compelling. Review the table below for more details.

|  |  |
| --- | --- |
| Estimated effort hours to create methodology and standard set of templates | 1,000  *(replace with your estimate)* |
| Estimated cost of labor per hour. (Let’s assume that our internal cost of labor is $75 per hour - it is probably more.) | $75 *(replace with your estimate)* |
| **Total cost to create basic methodology from scratch** (assuming we even have the expertise and the people available). | **$75,000  *(replace with your estimate)*** |
| Total cost of TenStep license | $2,000 *(replace with your quoted price from TenStep, Inc.)* |
| Total internal effort to customize TenStep process, including placing our logo on templates | 100 *(replace with your estimate)* |
| Total cost to customize TenStep content for our needs | $7,500 *(replace with your estimate)* |
| **Total cost to license TenStep content and customize for our needs** | **$9,500 *(replace with your estimate)*** |

This comparison does not really tell the entire story because even if we spent 1,000 hours building our own methodology, it would not end up being nearly as comprehensive and rigorous as the TenStep product. We also need to understand that even if we had the full amount of time needed for a custom development project, we don’t have the right level of expertise. We aren’t methodology experts – TenStep is.

# Background of TenStep

TenStep ([www.TenStep.com](http://www.TenStep.com)) is headquartered in Atlanta, Georgia (USA), and specializes in developing, consulting and training in business methodologies. Their flagship product is the TenStep® Project Management Process which has been licensed to over 6,000 companies and individuals around the world.

TenStep is a global company, with a network of 40+ offices, instructors and consultants around the US and around the world. Their worldwide network supports TenStep products that are translated for the local market. They have branch offices in Germany, Mexico, Brazil, Italy, Poland, Croatia, France, China, Romania, Bulgaria, Hungary, Portugal, Spain, Ukraine, and many other countries.

TenStep, Inc. contact information is as follows:

TenStep, Inc.   
181 Waterman St

Marietta, GA. 30152   
Tel: 877.536.8434 or 770.795.9097

# TenStep® Products

TenStep, Inc. develops the following business methodology products. All of these products would be great additions to our environment.

## TenStep® Project Management Process

The TenStep Project Management Process is a methodology for managing work as a project. TenStep provides the information necessary to successfully manage projects, including processes, procedures, techniques, best practices training and templates. This is by far their most popular product.

## ProgramStep™ Program Management Process

A program is designed to manage a group of related projects in a way that provides benefits and control not available by managing each project individually and independently. The ProgramStep™ Program Management Process helps program managers successfully manage programs of all kinds.

## LifecycleStep™ Project Lifecycle Process

The LifecycleStep Project Lifecycle Process contains a complete methodology for developing and running the project lifecycle including analysis, design, construct, test and implement. Everything is here, including processes, techniques, templates, training and supplemental papers. Multiple lifecycles are defined, including waterfall, RAD and Agile.

(Please note that LifecycleStep and ProgramStep are licensed separately, but are still very affordable.)

Licensing Options

|  |  |
| --- | --- |
| **Company License** | **Includes** |
| The licensed ability to utilize the TenStep Project Management Process | smallredcheck |
| Access to basic TenStep Project Management Process | smallredcheck |
| Access to Member Template Library, Basic Template Library and Extended Template Library with over 100 templates for immediate use. | smallredcheck |
| Access to the Project Management Corner Library | smallredcheck |
| Access to TenStep Process eBook Library | smallredcheck |
| Access to Sample Template Library | smallredcheck |
| Access to TenStep published books | smallredcheck |
| Access to Visio and MindMap Process Flowchart Library | smallredcheck |
| Access to Process Descriptions Library | smallredcheck |
| Access to The Audio Learning Library – (companies with at least 10 users only) Over 50 audio sessions included. These sell individually for $9.99 | smallredcheck |
| Access to the eClass Library - (companies with at least 10 users only). A $400 value per person if purchased individually. | smallredcheck |
| Access to the Quality Corner Library, Management Corner Library, HR Corner Library and Education Corner Library | smallredcheck |

# Summary

In summary, I recommend we purchase a company license with the products noted above. This option is much less expensive than trying to create the content from scratch. Plus, if we buy a license today, we can be using the content tomorrow instead. If we build the content from scratch, it will be months before we have the basics in place and it will not be nearly as comprehensive and well-organized as the TenStep process is today. To me it’s a “no brainer”. Let’s go ahead and purchase the license.

Appendix A: Template Listing

The following section lists most of the templates provided in the complete TenStep license. Additionally, training material, user guides, process flow charts and other supporting documentation and tools are provided in the package.

|  |  |
| --- | --- |
| • **Abbreviated Project Charter**  • **Project Charter**  • **Service Request Form**  • **PMS Project Management Schedule Shell**  • **Issues Log**  • **Issues Submission Form**  • **Scope Change Log**  • **Scope Change Request Form**  • **Individual Status Report**  • **Project Status Report**  • **Quality Plan**  • **Project Scorecard**  • **Customer Satisfaction Survey**  • **Integrated Project Management Plan**  • **Planning Compliance Checklist**  • **Project Plan**  • **Project Management Procedures**  • **Responsibility Matrix**  • **Simple Statement of Work**  • **SWOT Analysis**  • **Team Directory**  • **Cost Baseline**  • **Cost Estimate Summary**  • **Cost Management Plan**  • **Effort and Cost Estimate (Excel)**  • **Milestone Summary Chart**  • **Resource Requirements**  • **Schedule Management Plan**  • **Staffing Management Plan**  • **Action Item Log**  • **Business Case**  • **Business Plan**   * **Corrective Action Log**   • **Detailed Cost Estimate Variance Log**  • **Lessons Learned**  • **Meeting Minutes**  • **Project Completion Checklist**  • **Project Kickoff Meeting Agenda**  • **Revised Cost Request**  • **Change Control Request Form**  • **Integrated Change Control Log**  • **Scope Management Plan**  • **Communications Management Plan**  • **Milestone Summary Report**  • **Project Status Report II**  • **Communication Plan**  • **Meeting Discussion Log**  • **Meeting Roster**  • **Project Status Report III**  • **Documentation Summary**  **• Project Memo**  **• Project Documentation Checklist**  **• Version Tracking Page**  **• Project Performance Report**  • **Risk Contingency Worksheet**  • **Risk Factors Checklist**  • **Inherent Risk Checklist**  • **Risk Identification Worksheet**  • **Risk Management Plan**  • **Risk Review**  • **Risk Submission Form**  • **Risk Tracking Log**  **• Risk Control Form**  **• Risk Management Checklist**  **• Risk Response Worksheet**  • **Deliverable Review**  • **QA** **Checklist for Outsourced Projects**  • **Completeness and Correctness Criteria**  • **Project Assessment (two types)**  • **Project Assessment Summary**  • **Quality Assurance Checklist**  • **Quality Control Checklist**  • **End of Project Metrics Worksheet**  **• 360 Feedback Summary** | **• Acknowledgement of Drug / Alcohol Policy**  **• Applicant Interview Summary**  • **Authorized Signature Form**  **• Candidate Background Check**  **• Client 360 Review Checklist**  **• Coaching Action Form**  **• Confidentiality Agreement**  • **Defining a Logical Organization Checklist**  • **Documenting a Policy**  **• Employee Complaint**  **• Employee Exit Interview**  **• Employee Non-Compete Agreement**  **• Employee Personal Contact Information**  **• Employee Referral**  **• Employee Salary Change Summary**  **• Employee Self-Evaluation**  **• Employee Suggestion**  **• Employee Training Log**  • **Formal Acceptance**  **• Formal Performance Warning**  **• Hiring Authorization**  • **Information Retention Questionnaire**  **• Job Change Form**  **• Job Description**  **• Job Posting**  **• Leave of Absence Form**  **• Life Status Change Form**  • **Mutual Nondisclosure Agreement**  **• New Employee 90-Day Evaluation**  **• New Employee Information**  **• New Hire Log**  **• New Hire Request Form**  • **New Report Request**  **• Nondisclosure Agreement**  **• Performance and Development Plan**  **• Performance Review**  **• Personal Change Form**  • **Phase Acceptance**  • **Product Description**  • **Project Data Retention Sheet**  **• Project Manager Interview Questions**  • **Project Recovery**  • **Project Workshop Agenda**  **• Quarterly Review Work Characteristics**  **• Recruitment Referral Payment**  • **Request for Flex Time**  **• Return from Leave of Absence Form**  **• Salary Change Form**  • **Simple Software License Agreement**  • **Statement of Work**  **• Systems Analyst Interview Questions**  **• Teleworking Policy**  **• Travel Expense Report**  **• Upward 360 Review Feedback**  **• Vacation Request Form**  **• Weekly Timesheet**  • **Yearly Performance Objectives**  • **Application Inventory Template**  • **Application Server Inventory Template**  • **Application Server Maintenance List**  • **Application Maintenance Manual**  • **Client Contacts by Application Template**  • **Application Primary and Backup Listing**  • **Skills Inventory per Application**  • **Skills Inventory per Technology**  • **Application Users**  • **Rotating Dispatcher Schedule**  • **On Call List**  • **Management Survey of Support Org**  • **Client Problem Ticket Support Survey**  • **Service Level Agreement & Example**  • **Workload Forecast Template**  • **Staff Allocation Template**  • **Workload Actuals vs. Forecast Template**  • **Disaster Recovery Manual**  • **Documentation Inventory**  • **Vendor Contact List**  • **Vendor Software Licensed User Counts** |

# Appendix B: Classes Offered by TenStep, Inc.

The following classes are offered by TenStep, Inc. We could consider a couple of these for our staff.

* **Project Management Preparation for Success *(3 Days)*   
  *This is their most popular class and a great way to start a project management initiative.***
* **TenStep – PMP Preparation Boot Camp *(5 Days)***
* **Project Management "Back to Basics" *(2 Days)***
* **Project Management Overview *(1 Day)***
* **Project Management ... for Executives *(1/2 Day)***
* **Building a Project Schedule *(1 Day)***
* **Project Risk Management *(1 Day)***
* **Project Estimating *(1 Day)***
* **Project Quality Management *(1 Day)***
* **Earned Value Management *(1 Day)***
* **Procurement Across the Project Lifecycle** ***(1 Day)***
* **Recovering Troubled Projects *(1 Day)***
* **Managing Project Scope *(Half Day)***
* **Problem Solving** ***(Half Day)***
* **Conducting Meetings *(1 Day)***
* **Presentations: Preparing, Developing and Delivering (*2 Days)***
* **Leadership Skills Development (*2 Days)***
* **Advanced Interpersonal Communication (*1 Day)***
* **Overview of the Software Development Lifecycle (*1 Day)***
* **Gathering Business Requirements *(1 or 2 Days)***
* **Agile Project Development (*1 or 2 Days)***
* **Basics of Process Modeling *(1 Day)***
* **Fundamentals of Portfolio Management *(1 Day)***
* **Building and Running a Project Management Office *(1 Day)***
* **Organizational Change Management *(1 Day)***
* **Program Management Overview** ***(1 or 2 Days)***
* **More!**

# Appendix C: Consulting ServicesOffered by TenStep

The following consulting services are offered by TenStep. We could consider a couple of these areas.

* **Coaching and Mentoring**
* **Document Review Service**
* **Methodology Deployment**
* **Portfolio Management Implementation**
* **Project or Organization Assessments**
* **Project Management and Lifecycle Customization**
* **Project Management Fast Track**
* **Project Management Professional (PMP®) Preparation and Guidance Program**
* **Project Management Staffing Service**
* **Project Manager Placement Service**
* **Project QuickStart**
* **Project Rescue Services**
* **TenStep License and Deployment Advantage**
* **More…**