



metapm

# MetaPM Case Study

## Build v Buy Eval Mobilisation – Financial Services

### The Challenge

- AXA platform strategy focused around in-house platform (Super1)
- Without detailed business requirements select a vendor(s) to assess against an internal build, including cost and timeframe (+/- 25%)
- In addition, reconcile the current platform strategy with introduction of a new platform supporting the same types of products

### MetaPM's Approach

- Market scan (Accenture) to go from 50 to 5 vendors
- 2-hour presentations to select final 2 vendors
- 2-week workshop assessments of finalists (functional/technical/due dil)
- Work with Super1 platform team on costs and do-ability (time/resource)
- Weekly meetings with IS management team to understand strategy and background on in-built platform and reconcile strategic direction v new vendor platform
- Work with procurement and Legal team (internal & external) to draft vendor master, implementation & licence agreements
- Engage Procurement for assessment process and final scoring
- Work with team on evaluation criteria, process and scoring
- Detail vendor risk analysis and treatment strategies
- Work with Sponsor/Business PM/Program Manager to prepare final exec presentations
- Prepare Gate 2 business case costs & do-ability based on presentation recommendation
- Establish principles for engaging with the vendor

### The Results

Executive approval of vendor selection, implementation and BC