InfoSENTRY Quality Assurance (QA) Review and Independent Verification And Validation (IV&V) in a Client Relationship Management (CRM) Project

InfoSENTRY conducted an independent quality assurance (QA) review for a $13 million "Client Relationship Management" (CRM) planning project in a state Department of Health and Human Services (DHHS). The agency had contracted with a consulting firm to develop a plan for a Federal project involving implementation of a Client Relationship Management system. The CRM objective was to unify data entry and client and case tracking for multiple programs in the health and human services agency.

When the agency submitted the consulting firm's plan to the Federal government for approval and funding, the Federal agency questioned the plan's methodology, its findings regarding the CRM project, and the consulting firm's recommendations for a several hundred million dollar implementation project. The state's Chief Information Office (CIO) and information resource management agency contracted with InfoSENTRY to conduct a quality assurance audit as a check between the consulting agency's position and the Federal agency's position on the plan's merits.

InfoSENTRY's team followed a methodology consistent with Institute for Electrical and Electronics Engineers (IEEE) guidelines and the state's QA guidelines. Those guidelines specified a research approach involving extensive documentation examinations, stakeholder interviews, and content analyses. The document examinations involved reviews of hundreds of project meeting minutes, status reports, and planning documents. InfoSENTRY conducted stakeholder interviews with agency senior managers, project managers, project staff, information technology staff members, and county human service agency directors throughout the state. InfoSENTRY's quality audit resulted in 24 findings and recommendations for improving project management before it received a full approval by the CIO's organization to advance to the next level of operation.

InfoSENTRY also performed an independent verification and validation (IV&V) review of the CRM's project plan. The review examined the vendor's plan deliverable against (1) Federal plan requirements, (2) state information technology planning requirements, and (3) the vendor's contract requirements. The IV&V review found that the vendor's plan had failed to meet Federal plan requirements and the vendor's contractual requirements. The review made specific recommendations for the project to remediate the plan's shortcomings.