ANNEX I

REQUEST FOR PROPOSALS (RFP) N° PTD/11/002

TERMS OF REFERENCE

FOR

Professional Services for the development of an ERP portfolio Vision and high level conceptual design.

December 2010

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I.   OVERVIEW OF WIPO

1.   The World Intellectual Property Organization (WIPO), a United Nations (UN) specialized agency, is dedicated to the promotion of innovation and creativity for the economic, social and cultural development of all countries through a balanced and effective international intellectual property (IP) system. In a world where the economic growth of nations is driven increasingly by the creativity and ingenuity of their people, effective IP systems (which create incentives for innovation, and structures for sharing the results) are key to unlocking this human potential. Intellectual property, once seen as a primarily technical matter for legal experts, is today a high priority for governments, businesses, researchers, academics, individual creators and civil society.

2.   WIPO is the lead intergovernmental organization dedicated to the promotion and use of IP. Its diverse activities include:

- Administering multilateral treaties and working with Member States to support the evolution of the international legal framework for IP;

- Providing global IP services that make it easier and more cost-effective to obtain protection internationally for new inventions, brands and designs; and providing arbitration, mediation and other alternative dispute resolution services;

- Assisting governments and organizations in establishing national IP and innovation strategies, developing appropriate regulatory frameworks and building the infrastructure and human capacity needed to harness the potential of IP for economic development;

- Developing technical platforms to facilitate work sharing among IP offices; and developing free databases of registered trademarks, designs and the technological information contained in patents to facilitate access to knowledge;

- Building awareness, understanding and respect for IP;

- Working in partnership with the UN and other organizations to identify IP-based solutions to climate change, food security, public health and other global challenges.

3.   WIPO was established in 1970, following the entry into force of the 1967 WIPO Convention, with a mandate from its Member States to promote the protection of IP throughout the world, through cooperation among states and in collaboration with other international organizations.

4.   WIPO's Member States determine the strategic direction and approve the activities of the Organization. Delegates from Member States meet in its Assemblies, committees and working groups. WIPO currently has 184 Member States, and 68 intergovernmental organizations (IGOs) and 271 non-governmental organizations (NGOs) are accredited as observers at WIPO meetings. The main policy and decision-making bodies of WIPO's Member States are the WIPO General Assembly and the WIPO Coordination Committee. Other union assemblies have been established under WIPO-administered treaties, for example, the PCT Union Assembly and the Madrid Union Assembly. Standing committees are established for a particular purpose by the General Assembly. A standing committee or any of the assemblies can decide to set up a working group to examine a particular question in more detail. The WIPO

secretariat is based in Geneva and its staff are drawn from more than 100 countries, including experts in all fields of IP law and practice, as well as specialists in, for example, public policy, economics, administration, translation and information technology (IT).

5.　　Following the appointment of Director General Francis Gurry in October 2008, WIPO embarked on a major organizational change program designed to better equip the Organization to meet the challenges of the rapidly changing IP environment. The Strategic Realignment Program (SRP) began by redefining WIPO's strategic-level goals. The nine strategic goals, which provide the framework for WIPO's Medium Term Strategic Plan and its biennial Program and Budget, are:

- A balanced evolution of the international normative framework for IP;

- Provision of premier global IP services;

- Facilitating the use of IP for development;

- Coordination and development of global IP infrastructure;

- World reference source for IP information and analysis;

- International cooperation on building respect for IP;

- Addressing IP in relation to global policy issues;

- A responsive communications interface between WIPO, its Member States and all stakeholders;

- An efficient administrative and financial support structure to enable WIPO to deliver its programs.

II.　　BACKGROUND

6.　　The achievement of Strategic Goal IX of WIPO's Strategic Framework which seeks to build "an efficient administrative and financial support structure to enable WIPO to deliver its Programs" depends critically on the successful and effective implementation of an integrated Enterprise Resource Planning (ERP) system. The ERP system will be a central tool and enabler for a number of key strategies being enunciated within the Medium Term Strategic Plan (MTSP) for this goal. The ability of WIPO to build a responsive communications interface between itself, its Member States and key stakeholders will also depend to a significant extent on the ERP implementation which will enable the capture, consolidation and reporting of information in a streamlined, reliable and transparent manner.

7.　　The SRP is based around four core values:

- Customer-service orientation;

- Working as one;

- Accountability for results;

- Environmental, social and governance responsibility.

The establishment of these core values will enable the achievement of the Organization's strategic goals and the delivery of its programs (Refer Diagram I). The implementation of a comprehensive and integrated ERP solution will provide the tools, processes and the integrated environment needed to support the promotion of the core values.

Diagram I
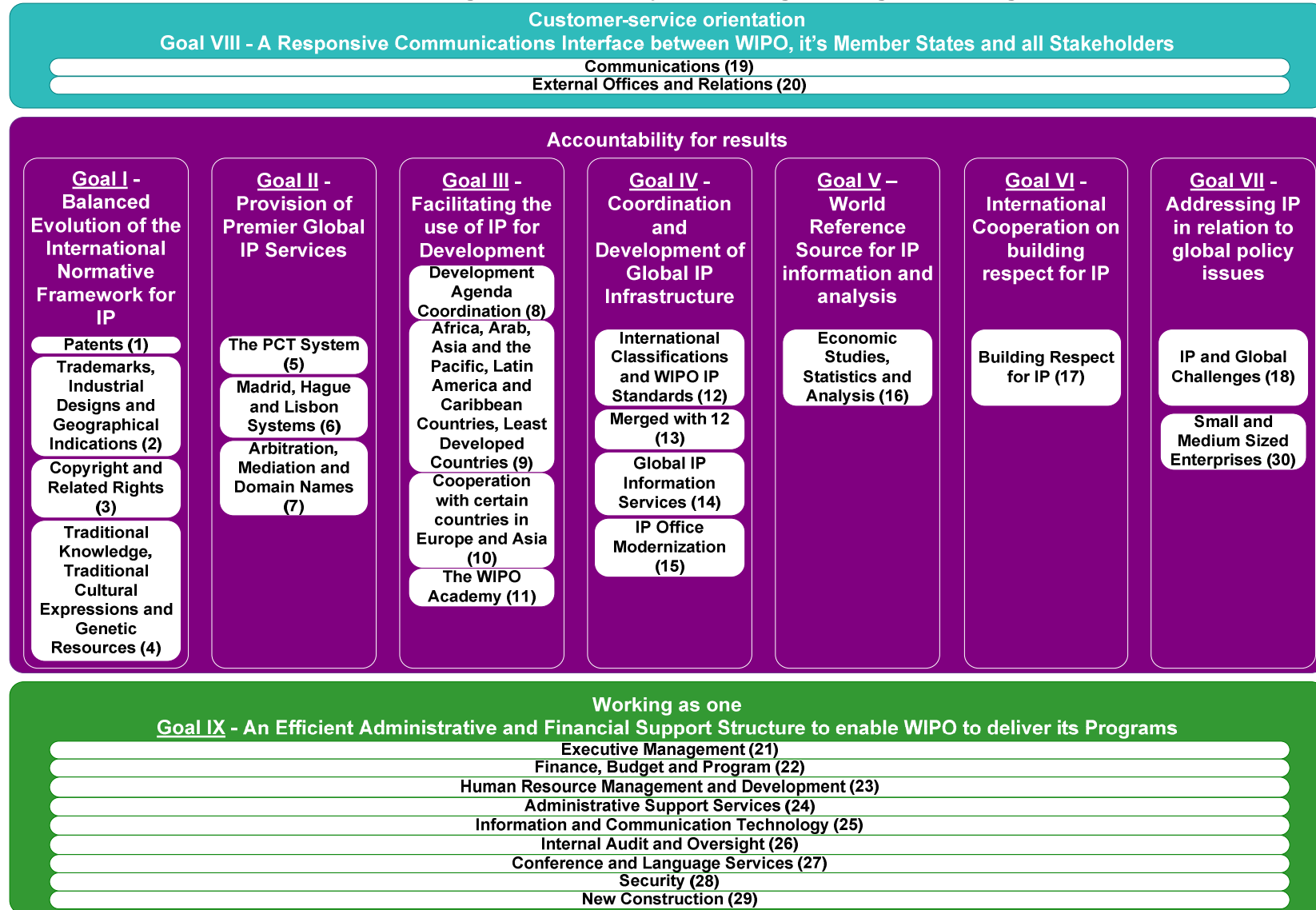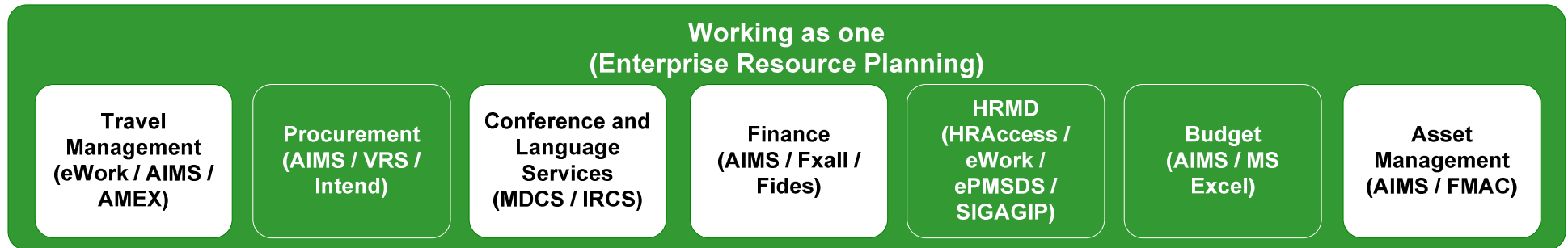## WIPO's Goals and Programs enabled by the Strategic Realignment Program

Customer-service orientation
Goal VIII - A Responsive Communications Interface between WIPO, it's Member States and all Stakeholders

Communications (19)

External Offices and Relations (20)

Accountability for results

Goal I - Balanced Evolution of the International Normative Framework for IP

- Patents (1)
- Trademarks, Industrial Designs and Geographical Indications (2)
- Copyright and Related Rights (3)
- Traditional Knowledge, Traditional Cultural Expressions and Genetic Resources (4)

Goal II - Provision of Premier Global IP Services

- The PCT System (5)
- Madrid, Hague and Lisbon Systems (6)
- Arbitration, Mediation and Domain Names (7)

Goal III - Facilitating the use of IP for Development

- Development Agenda Coordination (8)
- Africa, Arab, Asia and the Pacific, Latin America and Caribbean Countries, Least Developed Countries (9)
- Cooperation with certain countries in Europe and Asia (10)
- The WIPO Academy (11)

Goal IV - Coordination and Development of Global IP Infrastructure

- International Classifications and WIPO IP Standards (12)
- Merged with 12 (13)
- Global IP Information Services (14)
- IP Office Modernization (15)

Goal V – World Reference Source for IP information and analysis

- Economic Studies, Statistics and Analysis (16)

Goal VI - International Cooperation on building respect for IP

- Building Respect for IP (17)

Goal VII - Addressing IP in relation to global policy issues

- IP and Global Challenges (18)
- Small and Medium Sized Enterprises (30)

Working as one
Goal IX - An Efficient Administrative and Financial Support Structure to enable WIPO to deliver its Programs

Executive Management (21)

Finance, Budget and Program (22)

Human Resource Management and Development (23)

Administrative Support Services (24)

Information and Communication Technology (25)

Internal Audit and Oversight (26)

Conference and Language Services (27)

Security (28)

New Construction (29)

Diagram II
WIPO's Current Solution Map

MEMBER STATES / CUSTOMERS / STAKEHOLDERS

Customer-service orientation
(Customer Relationship Management)

Patents (PCT)	Trademarks (Madrid)	Designs (Hague)	Appellations of Origin (Lisbon)	Publication Sales (Evolution)

Accountability for results
(Enterprise Performance Management)

Work Planning (MS Office)	Line Management	Deliver Results	Performance Assessment (Intranet Reports)

Working as one
(Enterprise Resource Planning)

Travel Management (eWork / AIMS / AMEX)	Procurement (AIMS / VRS / Intend)	Conference and Language Services (MDCS / IRCS)	Finance (AIMS / Fxall / Fides)	HRMD (HRAccess / eWork / ePMSDS / SIGAGIP)	Budget (AIMS / MS Excel)	Asset Management (AIMS / FMAC)

SUPPLIERS / SERVICE PROVIDERS / UN AGENCIES

8.   The Secretariat started using PeopleSoft (an ERP system now used by several UN agencies) through the AIMS (Administrative Integrated Management Systems) Project which was approved by Member States, as part of the 2002/03 Program and Budget. This implementation had been restricted in scope to Finance and Budget Reporting for manageability and budgetary reasons while recognizing that several other administrative areas had equally important and urgent information processing needs. The system was implemented on time and within budget and allowed for the phasing out of high-cost mainframe based legacy systems which had limited capability to keep pace with WIPO's changing business needs. The project, in addition, seeded PeopleSoft and ERP skills and competencies within the Organization.

9.   More recently the Secretariat enhanced AIMS through the FRR-IPSAS Project which was approved by the Program and Budget Committee at their Thirteenth Session held in December 2008. This project covered the implementation of the Procurement and Asset Management modules, fully integrated with AIMS. It was consciously restricted in scope to allow WIPO to achieve, at a minimum, International Public Sector Accounting Standards (IPSAS) compliance and to implement the Financial Regulations and Rules (FRR) in an electronic system. This system became operational in January 2010, as planned and within the approved budget. This project, in addition to ensuring FRR and IPSAS compliance, has provided WIPO staff with significant experience of implementing cross-functional projects. WIPO is one of a small number of UN system organizations that have successfully implemented all measures and functionality necessary to achieve compliance with IPSAS within the timeframe targeted by the Chief Executives Board (CEB) and High Level Committee on Management (HLCM). The implementation of the system has also provided the much needed automation of WIPO's core procurement processes and the end-to-end integration of the Requisition-to-Payment process.

10.   It was emphasized, during the same Program and Budget Committee session of December 2008, that the full benefits of an ERP system can only be realized when it is used in an integrated manner across the Organization. Following the successful completion of the AIMS and FRR-IPSAS projects WIPO now has the foundations of an ERP system. However, significant pieces of functionality are either missing or are supported by stand alone IT systems. Diagram II shows the solutions currently used to support a function. The functional blocks shown in colour are still missing essential pieces of functionality. Additionally, the integration across current solutions remains weak. The gaps include the following three main areas:

    (a)   Human Resource Management and Development:

        •   Personnel Management;

        •   Payroll;

        •   Performance Management;

        •   Learning Management;

        •   Recruitment.

    (b)   Enterprise Performance Management:

        •   Results Based Management;

        •   Planning and Budgeting;

        •   Enterprise Reporting and Analytics.

(c)   Customer Relationship Management:

- Customer information consolidation;

- Support for Sales, Distribution and Marketing of products and services;

- Support for Customer-centric business practices.

WIPO's Results Based Management (RBM) approach includes results-based planning, monitoring and performance assessment. Firstly a management system and secondly a performance reporting system, RBM supports the transition to a strategy- and results-driven planning mode, and from an internal management focus on inputs and outputs to an outward-looking orientation centered on achieving results. The strengthening RBM initiative, within the SRP, aims at ensuring that the implementation of RBM translates into an organization-wide managing-for-results culture.

11.   Diagram III shows the WIPO conceptual RBM framework, the key elements are :

- Strategic Goals and Outcomes setting the strategic direction for the Organization in the medium-term (2010-2015), reflected in the Medium Term Strategic Plan (MTSP). Progress towards achieving the Strategic Outcomes will be measured by the Strategic Outcome Indicators;

- Expected Results at Program level in the Program and Budget, linked to the MTSP, determining the outcomes to be achieved in a biennium;

- The development of annual workplans at an operational level facilitating the implementation of the Program and Budget;

- Monitoring of progress against the workplans and expected results, performance indicators, baselines and targets, including through quarterly reports to the Senior Management Team;

- Assessment and reporting of evidenced-based achievement to Member States and other stakeholders through the Program Performance Reports (PPR);

- A Performance Management and Staff Development System (PMSDS) that links individual performance assessment to the results framework; and

- Senior Management Team Compacts with the Director General setting individual objectives.

The coming biennium 2012-13 will see a greater emphasis on the framing of clear and realistic results, the selection of relevant indicators, and an emphasis on improving monitoring and data collection methods. Improvements to the Program and Budget with fewer and more credible results and indicators will result in a better framework for managing organizational performance and persuasively demonstrating evidence of success. Workplans will increasingly be integrated into the Program planning and monitoring cycles. All this will require that RBM is supported by and effectively integrated into the future ERP system.

12.   Based on the success of the previous two projects and WIPO's prudent and phased implementation approach a proposal to expand the existing ERP through a portfolio of projects which would be executed in the same prudent vein was presented and approved by Member States, as part of the Program and Budget Committee at their Fifteenth Session held in 2010.

Diagram III

WIPO Conceptual RBM Framework
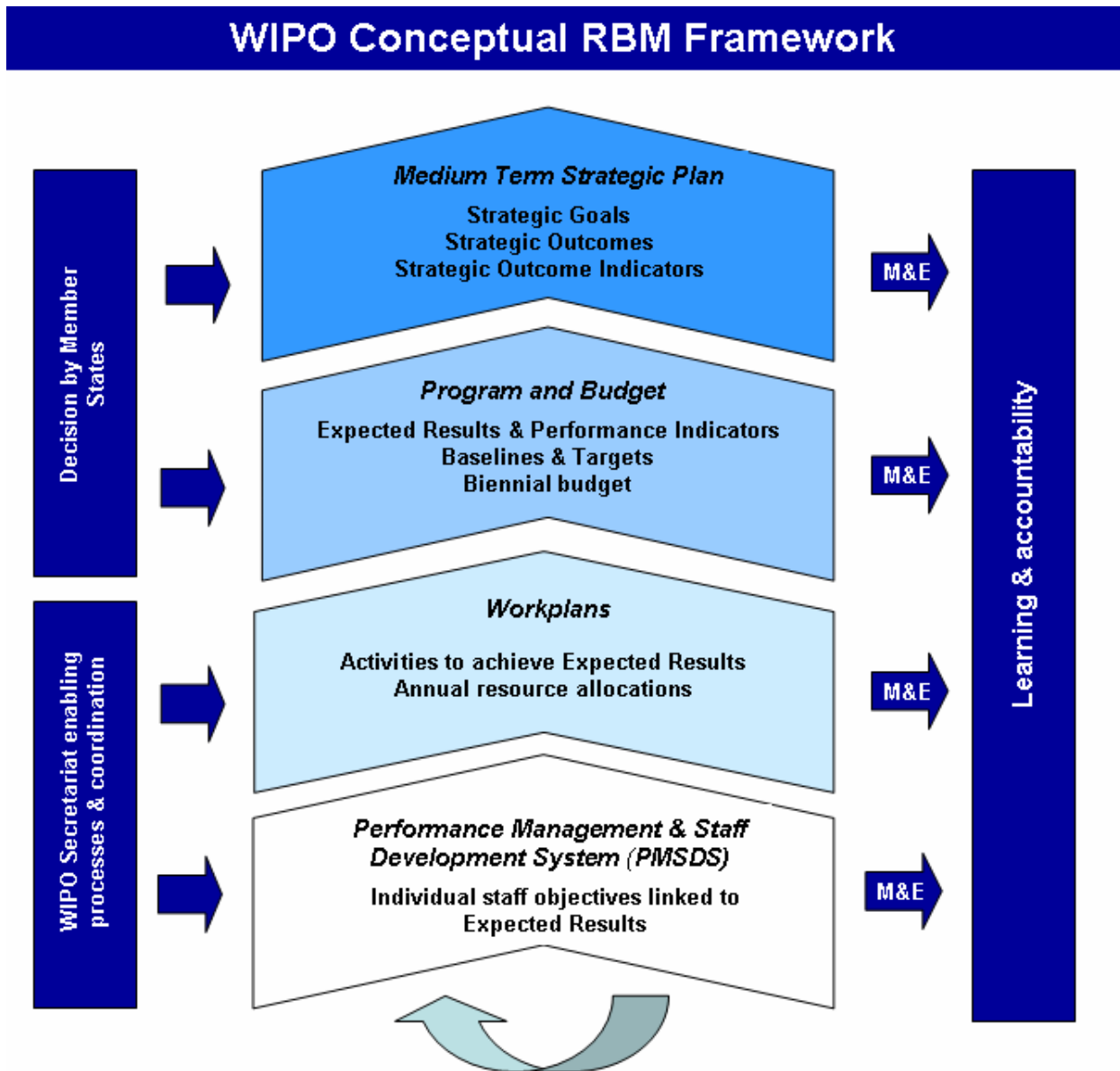
*M&E: Monitoring & Evaluation

III.   OVERVIEW OF THE ERP PORTFOLIO OF PROJECTS

13.   The portfolio of projects will be implemented in the same prudent vein as the previous projects and provides a roadmap for WIPO for the next five years (this is the only initiative within the SRP which will continue beyond 2012) over which time the existing ERP system functionality will be gradually enhanced and expanded. WIPO is, however, very conscious that the implementation of the future phases of the ERP would need to be based on a clear vision, a comprehensive and integrated conceptual design across all functions, well defined business requirements and in particular, a review and modification, as appropriate, of the chart of accounts that will take into account a comprehensive analysis of the reporting needs of Member States, customers and stakeholders. To achieve this, a Portfolio Vision will be agreed, a conceptual design defined and a strategic implementation plan developed to ensure the projects are managed in an integrated and structured manner to deliver the vision, thereby allowing WIPO to continue to prudently deploy the ERP system in a phased and controlled manner. Such an approach will also allow WIPO to continually assess and select, for each project, the most appropriate software solution, method of hosting and implementation assistance.

(a)   The portfolio of projects will contribute significantly to the achievement of the following three outcomes:

   •   Increased customer satisfaction and responsiveness to all global stakeholders (Customer-service orientation);

   •   Ownership for our actions, performance and the results we achieve (Accountability for results);

   •   Standardized integrated tools and processes promoting collaborative working, efficiency and value for money service delivery (Working as one).

   Diagram IV shows the solutions that will be in place, and the functions supported, following the successful completion of the portfolio of projects.

(b)   The portfolio of projects is expected to provide many benefits. The implementation of the ERP system will enable the establishment of an integrated organization that is efficient, responsive and delivers value for money. The ERP will be implemented on the basis of a clear vision and an enabling regulatory framework and will:

   •   Establish a transparent platform that enforces the consistent implementation and application of resource management policies and principles;

   •   Facilitate decision making based on enhanced access to improved performance and enterprise management information;

   •   Provide easy-to-use tools, automated workflows, productivity improvements and the opportunity for WIPO staff to perform value added work, such as analysis and reporting;

   •   Allow ICT to support a fully integrated cohesive strategic and modern administrative infrastructure.

14. The benefits for Human Resource Management and Development are:

- Integration of HR and Payroll into a single administrative system;
- Stabilized and robust payroll processing infrastructure (WIPO's current system is over ten years old and has limited ability to cope with business changes without risk);
- Efficient end-to-end processes for personnel, recruiting, performance management, learning and payroll through integrated workflow enabled modules that encourage collaborative working;
- Operational cost improvements through more efficient processes;
- An integrated system that enables improved HR practices, such as:
  - o Targeted recruitment activities based on needs;
  - o Reduced time to fill vacancies and bring new people on-board;
  - o Increased performance by helping to support strategic change within the Organization;
  - o Engaged and empowered employees and managers;
  - o Learning needs and development opportunities captured, consolidated, implemented and progress tracked;
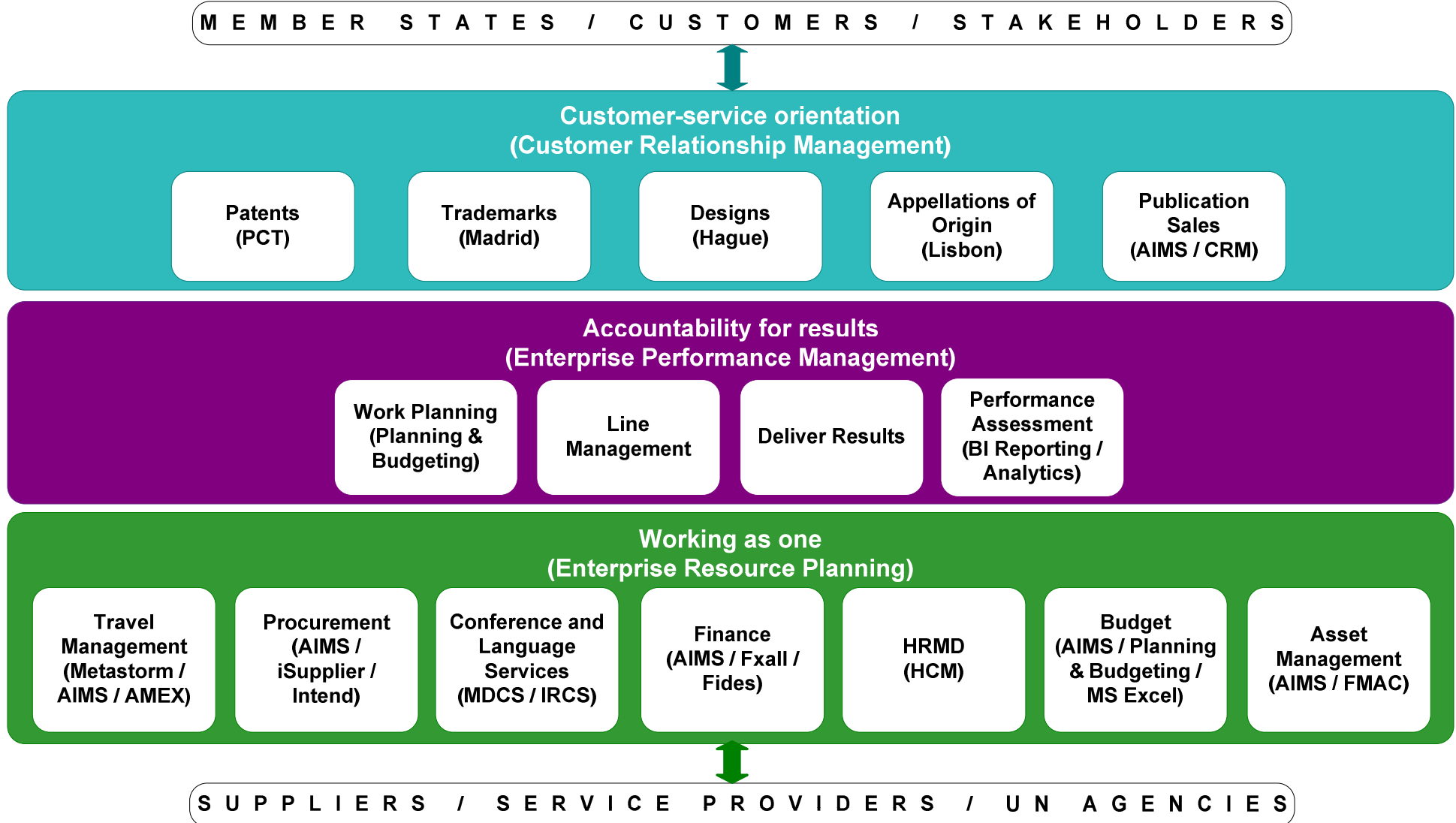 - o Learning activities linked to role requirements and career progression needs.

15. The benefits for Enterprise Performance Management are:

- Increased efficiency of the program and budget preparation process;
- Alignment of the existing ERP chart of accounts with the strategy of the Organization and reporting needs of Member States, customers and stakeholders;
- More complete and accurate budgets with forecasts that are integrated within the ERP system and which incorporate income, expenditure and HR;
- Improved reporting through higher quality information to support program management, donors and initiatives funded through extra-budgetary sources;
- Accountability by allowing delegated decision making, transaction tracking, transparency and internal control;
- Transparency of how resources are allocated and utilized against the expected results, thus enabling the optimal utilization of available resources toward strategic goals and objectives;
- Results planned and actual performance captured, monitored and assessed, allowing activity outputs and outcomes to be compared to the plans thus allowing Programs to continually improve.

16.   The benefits for Customer Relationship Management are:

- Centralized repository providing a single consolidated view of Member States, customers, stakeholders and their needs;

- Improved customer interface and experience through a central service centre utilizing a single repository of customer information;

- Sophisticated analytics and reporting capabilities providing flexibility to interrogate data, uncover hidden trends and to improve information availability to Member States, customers and stakeholders;

- Use of consolidated customer data to potentially increase value through a better understanding of customer needs.

Diagram IV
WIPO's Future Integrated Solution Map

M E M B E R   S T A T E S   /   C U S T O M E R S   /   S T A K E H O L D E R S

Customer-service orientation
(Customer Relationship Management)

| Patents (PCT) | Trademarks (Madrid) | Designs (Hague) | Appellations of Origin (Lisbon) | Publication Sales (AIMS / CRM) |

Accountability for results
(Enterprise Performance Management)

| Work Planning (Planning & Budgeting) | Line Management | Deliver Results | Performance Assessment (BI Reporting / Analytics) |

Working as one
(Enterprise Resource Planning)

| Travel Management (Metastorm / AIMS / AMEX) | Procurement (AIMS / iSupplier / Intend) | Conference and Language Services (MDCS / IRCS) | Finance (AIMS / Fxall / Fides) | HRMD (HCM) | Budget (AIMS / Planning & Budgeting / MS Excel) | Asset Management (AIMS / FMAC) |

S U P P L I E R S   /   S E R V I C E   P R O V I D E R S   /   U N   A G E N C I E S

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IV.   OVERALL SCOPE OF THE ERP PORTFOLIO OF PROJECTS

17.   The first phase will be an initiation, planning and vision phase. In this phase, a high-level Portfolio Vision will be defined and agreed for the core functional areas that the portfolio of projects will impact. This will include the future direction for the provision of management and administrative services based on the strategies outlined in the MTSP, see Appendix A. It will also provide guidance and clear direction for each functional area - Program Management, Finance and Budget, Human Capital Management (HCM), Procurement, Travel and ICT. It will provide the key principles of how WIPO will manage its resources and a conceptual design of the required future solution, taking into consideration the accountability framework for WIPO and the delegation of authority (DOA) needed to achieve effective results.

18.   The scope of the initiation, planning and vision phase will include an analysis of the impact of the conceptual design and DOA on current systems, tools and processes, including master data changes such as the chart of accounts. The Portfolio Vision will provide guidance, clarity and will help to ensure that all the projects within the portfolio deliver solutions that are coherent, aligned and support WIPO's ICT strategy. Each project will provide benefits to WIPO and will gradually deliver business capabilities supported by an integrated set of tools and applications across the three main areas as follows:

Human Resource Management and Development

19.   The current SIGAGIP and Human Resource systems (HR Access), which were implemented around the year 2000, are struggling to keep pace with user requirements, in particular with respect to planning and management information. They also now run on older technology, which is becoming increasingly obsolete, unreliable and difficult to maintain. The implementation of the Human Resource Strategy submitted in its preliminary form to the WIPO Assemblies in 2006 (document A/42/10, Annex V) and in its final form to the 2007 session of the Assemblies of WIPO Member States, will depend extensively on the enhanced utilization of IT systems within HRMD. The ultimate functionality of such a system would need to cover all aspects of HCM. The initial project would provide the core HR functionality to replace what is provided by the current SIGAGIP/HR Access systems, including personnel data management, benefits and entitlements, payroll and absence management. An important component of this project would be the implementation of a position management solution that complies with the Regulatory Framework/revised Staff Regulations and Rules that are targeted for implementation on January 1, 2012.

20.   The current ePMSDS system is a stand-alone application with limited integration into the other WIPO applications. By the end of 2012, WIPO's knowledge and maturity of using a performance management solution will have grown, having used the ePMSDS system for a number of years. Following the successful introduction of core HR functionality and once the maturity of the business processes is sufficiently established, a project will be initiated to introduce an integrated staff performance management solution, either through a new module or through the integration of the ePMSDS into the HCM modules.

21.   Following the successful introduction of performance and position management, the next logical step would be to take the outputs from these processes, the development opportunities, and to use these to create an Organization that continually learns, evolves and nurtures the internal talent. This will be achieved by introducing a

learning management and career development solution fully integrated with the other HCM modules.

22.   Whilst WIPO will always look to, and fully utilize, the existing internal talent within the Organization, a need to attract and retain new external talent has been recognized by the SRP. To enable WIPO to attract the best talent the Organization needs to portray a professional image from the outset. A modern electronic recruitment solution will be introduced to complete the HCM solution. This may be achieved either by introducing a new module, or by integrating with the recently introduced e-Recruit solution.

Enterprise Performance Management

23.   An enterprise performance management strategy and roadmap will be developed and reporting tools will be introduced that will provide the strategic basis for future reporting and analytics. A plan will be developed and implemented to integrate the current Program Management Reports into the Enterprise reporting architecture over the timeframe of the project.

24.   At present, the process of preparation and finalization of the Program and Budget of the Organization lacks structured IT system support. This is currently undertaken using spreadsheets which are limited in functionality and structure. Also, with the move to an organization that has more accountability for results and the need to strengthen Results Based Management (RBM), WIPO urgently needs develop a roadmap to support RBM and to introduce tools to support planning, budgeting, monitoring and performance assessment. These tools would be fully integrated into the existing financials solution and the proposed HCM solution. They would also utilize the strategic reporting tool to allow reporting and analytics to help the Organization monitor activities, budget usage and achievement of results.

25.   Whilst the existing chart of accounts (COA) structure implemented in AIMS has supported WIPO for many years the introduction of RBM and advanced analytical reporting tools provides WIPO with an opportunity to enhance the COA to meet the key analysis and reporting needs of Member States and stakeholders. Once the Portfolio Vision has been agreed, the existing COA structure and usage will be reviewed. This review would include an analysis of all existing solutions that would be impacted by the introduction of a redesigned COA.

Customer Relationship Management

26.   Customer-Service orientation is a core-value that is sought to be established and promoted through the SRP, with customers including Member States, fee paying customers and other stakeholders. Significant efforts are underway to establish best practice based customer service processes. Improved customer information is a key enabler for Customer-Service. At present customer information is held within many different systems, including: PCT, Madrid, Hague, Lisbon, Publication Sales and AIMS. None of these systems provide a single view of a customer, their relationship with the Organization and their needs. A Customer Relationship Management (CRM) system would sit above and gradually integrate with the existing systems to provide a single consolidated view of WIPO's customers. This would help WIPO to understand customer needs more clearly, improve Member States and stakeholder reporting and help WIPO to implement strategies to promote the use of IP and to optimize revenue streams. A CRM system would also provide an opportunity for WIPO to replace the

home grown Publication Sales system with a fully integrated solution.

27.   Once established, and whilst outside the current scope, the functionality in the CRM solution will provide opportunities for WIPO to offer customer-centric services in the future, such as grouping services, supporting different pricing strategies, allowing discounts and additional value-added and fee-paying services.

28.   As previously mentioned WIPO has the foundations of an ERP system. However, with increased user awareness and maturity and the availability of new functionality within the standard products, some functions may have the potential to benefit from additional functionality. Additionally, the Portfolio Vision and conceptual design may necessitate changes or modifications to the existing systems. Projects are therefore envisaged to enhance the existing Finance, Procurement and Travel systems through upgrades to introduce improved functionality contained in the latest versions of the software and tools, additional modules and configuration changes to enable new features.

Key Deliverables

29.   The key deliverables from the portfolio of projects are the following:

- ERP Portfolio Vision, Conceptual Design, Enterprise Performance Management strategy and roadmap Accountability Framework and Delegation of Authority;

- Implementation of Core HR and Payroll;

- Introduction of the latest version of PeopleSoft Financials;

- Implementation of Performance and Position Management;

- Implementation of Learning Management and Career Development;

- Implementation of Recruitment;

- Implementation of Planning and Budgeting;

- Implementation of Reporting, Analytics, Monitoring and Performance Assessment;

- Implementation of Customer Relationship Management (CRM);

- Introduction of an Electronic Document Management System.

All implementations will adopt the best practices inbuilt in the software and where required WIPO processes and practices will be re-engineered to suit the best practices in the software thus minimizing the customizations.

Key elements of the approach

30.   The portfolio of projects will be implemented with full consideration of the key success factors for such implementations and of the lessons learnt by WIPO on previous projects and by other agencies of the UN system. The approach will include the following:

(a)   Strong Portfolio and Project Governance

•   A Project Portfolio Board will be established to provide overall management across the portfolio of projects, providing the governance structure to ensure that progress is made and that the wider business benefits are identified and realized, managing the high level issues/risks and designing a quality management strategy that all projects will work within.

•   An ERP Project Management Office (EPMO) will be established to plan, monitor and support all the projects on a day to day basis.

•   A high-level Portfolio Vision and Conceptual Design will be established to provide guidance and clarity and to ensure that individual projects deliver solutions/benefits aligned with the vision.

•   For each project a brief will be created which provides the outline business case, the measurable business benefits that will be achieved, clarification on the solutions that will deliver the benefits, firm costs for the project and an assessment of the business readiness in relation to the project. Based on the information in the project brief the Project Portfolio Board will then authorize the project to proceed.

(b)   Adoption of Implementation Best Practices

The approach to the implementation will include the following key elements:

•   The projects will be implemented based on a clear and coherent Portfolio Vision.

•   Senior management sponsorship and accountability.

•   A business driven approach as opposed to an IT driven approach.

•   A "minimum customization" approach will be adopted. The cost and time to develop customizations are prohibitive factors. Additionally the ongoing cost of maintaining customizations and ensuring they operate after upgrades, continues to cost WIPO significant sums of money and therefore it is imperative that such needs are reviewed by senior management with rigor, and undertaken only upon full justification.

•   A "not reinventing the wheel" approach. This will be achieved by using the vanilla out of the box solutions as much as possible, as mentioned in the point above. Additionally, WIPO will leverage the experience and knowledge of other UN agencies by taking, where possible, the solutions they have already implemented. This will potentially provide time and cost savings as a project will start with a pre-configured proven solution which WIPO can then build on.

•   Risk management is seen as a key element of the approach. High-level risks will be recorded in a portfolio risk register which will be updated regularly and monitored at the EPMO level.

•   A formal control structure will be established for each project, including a Project Board comprising a single executive (ultimate decision maker), a senior user (customer) and senior supplier (IT and/or external supplier).

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The senior user will be a Program Manager in charge of the main business area concerned, who will be responsible for driving the change required within their respective area, and who will need to take policy and other decisions that will facilitate the smooth implementation in their sector.

- Project Management is a key role which must be undertaken by someone who has had recent successful experience in similar projects.

- Each project will be undertaken with substantial assistance from an experienced and qualified Implementation Partner.

- User ownership will be needed in order to complete a project successfully. Therefore, the participation of full-time users who are knowledgeable about their business areas and information needs (relieved partially, substantially, or fully, as appropriate, from their current duties) is imperative for the success of each project. Such participation has been assumed and costs of backfilling have been included in the budget.

- A thorough planning, scoping and preparation phase will be performed during initiation of a project, focusing on the development of a detailed project plan, finalizing the scope based on the business process requirements, and potentially preliminary training of certain key team members.

- Project level risks will be recorded in a project risk register which will be updated regularly and monitored by the Project Board. All risks will be assessed and prioritized based on their probability of occurrence and potential impact, with suitable countermeasures identified and recorded.

A Comprehensive Solution Architecture

- The ERP system will be implemented on the basis of a well-defined solution map and architecture (developed by a qualified and experienced Business Solution Architect) which addresses Enterprise Reporting, Electronic Document Management and Workflow. Emphasis will be on establishing a modern and scalable architecture that can support WIPO and its evolving business needs for many years. The ICT department will define the technical architecture and ensure that the project tools and standards comply with the ICT framework and strategy, especially IT Security.

- The architecture will be based on Oracle/PeopleSoft products which seamlessly integrate together and are compatible with the existing modules that make up AIMS (the financial, budget reporting, procurement and asset management systems which are also based on Oracle/PeopleSoft).

Leveraging of Existing Application Hosting Arrangements

- WIPO is successfully using PeopleSoft Applications hosted at the UNICC, which will be one option considered for some of the projects. Additionally other hosting arrangements will be considered for each project, including: in-house, on demand (software as a service), fully outsourced and shared service provider (solution hosted by another UN agency). The decision on hosting will be taken when initiating each project based on the software to be used, cost, service level and suitability for the overall solution.

V.   PROJECT PHASING AND TENTATIVE TIMELINE

31.   At this stage it is envisaged that the indicative timelines for the portfolio will be as shown in Diagram V. The timeline depicts the estimated timing in which business capabilities and supporting functionality will be deployed but does not depict all work streams required to implement the portfolio of projects. A comprehensive strategic plan will be developed during the initiation/ vision phase.

32.   This plan has been provided as an initial reference only. The selected implementation partner will be expected to assist WIPO in developing a comprehensive roadmap and plan to ensure that:

- There is a strong focus on delivering early value wherever possible;

- Each release of functionality focuses on external stakeholder value in addition to internally focused benefits;

- Projects are undertaken in logical sequence so as to minimize waste and re-work;

- Data quality initiatives are identified early on and planned for.

Diagram V
Anticipated Project Portfolio Timeline

Project	2010	2011				2012				2013				2014				2015			
	Q4	Q1	Q2	Q3	A4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
EPMO Initiation/Vision	▇	▇	▇																		
Personnel and Payroll			▇	▇	▇	▇	▇														
Performance Management								▇	▇	▇											
Learning Management											▇	▇	▇								
Recruitment																▇	▇	▇			
AIMS Enhancements	▇	▇	▇	▇	▇	▇	▇	▇	▇	▇	▇	▇	▇								
Planning and Budgeting				▉	▉	▉	▉	▉	▉												
Enterprise performance Management					▉	▉	▉	▉	▉	▉	▉	▉	▉	▉	▉	▉	▉	▉			
Customer Relationship Management													▆	▆	▆	▆	▆	▆	▆	▆	▆

33.   Below is a description of the key deliverables anticipated each year:

2010

- Establish the EPMO and Project Portfolio Board;

- Initiate the project for the development of the Portfolio Vision, conceptual design and solution map, including the accountability framework and delegation of authority; identify the key elements of the Enterprise Performance Management strategy and roadmap. Carefully consider the possibility of delivering early value from a first release of EPM functionality that will enhance results based management in the 2012/13 biennium

2011

- Confirm the strategic direction of the enterprise architecture and technology solutions for Business Intelligence, Enterprise Reporting, Electronic Document Management, Business Process Management and Workflow;

- Initiate the project to introduce an electronic document management system (EDMS) to strategically manage paper based documents/information that are within the scope of the ERP;

- Review and refine the portfolio plan to ensure that the current systems and modules are aligned with the strategic direction, target tools and architecture;

- Prepare detailed plans and resource estimates for the high priority phases/projects and obtain approval.

- Finalize the Portfolio Vision, conceptual design and solution map (reference:paragraphs 17 and 18 of Overall scope of the portfolio of ERP Projects)

- Determine the impact of the conceptual design on the current chart of accounts, systems and processes;

- Design the technical architecture and establish the technical environment and tools for the portfolio and its constituent projects;

- Upgrade the PeopleSoft Tools / Oracle database version used within WIPO, to provide a technically sound foundation for future development work based on the latest release;

- Deploy the strategic EDMS solution and start using it to manage the paper based documents/information that will support the scope of the ERP;

- Initiate the project to introduce a Personnel and Payroll solution;

- Initiate the project to introduce the Planning & Budgeting solution;

- Initiate the project to introduce the Enterprise Performance Management (EPM) solution, to support RBM, reporting, business analytics, monitoring and performance assessment;

- Initiate AIMS upgrade to the latest version of PeopleSoft Applications to ensure ongoing support and to take advantage of functionality improvements;

- EPM analytics deployed for Procurement and Financials.

2012

- AIMS, on the latest version of PeopleSoft Applications, deployed at the start of 2012;

- Redesigned COA deployed at the start of 2012;

- Personnel and Payroll solution deployed during 2012;

- Early version of Results based Planning, budgeting and reporting solution deployed during 2012;

- Initiate the project to introduce a Staff Performance Management solution.

2013

- Staff Performance Management solution deployed during 2013;

- Initiate the project to introduce a Learning Management solution;

- EPM analytics for Workforce (including performance) and Budgeting deployed during 2013;

- Agree the scope of a Customer Relationship Management (CRM) solution and initiate a project to commence a pilot CRM project.

2014

- Learning Management solution deployed during 2014;

- CRM pilot solution deployed during 2014;

- EPM analytics for Learning Management and CRM deployed during 2014;

- Enhanced version of results based planning, budgeting and reporting deployed during 2014

- Initiate projects to expand the CRM solution across, and integrated with, the existing strategic systems, such as PCT, Madrid, Hague and Lisbon;

- Initiate the project to introduce the Recruitment solution.

2015

- Recruitment solution deployed during 2015;

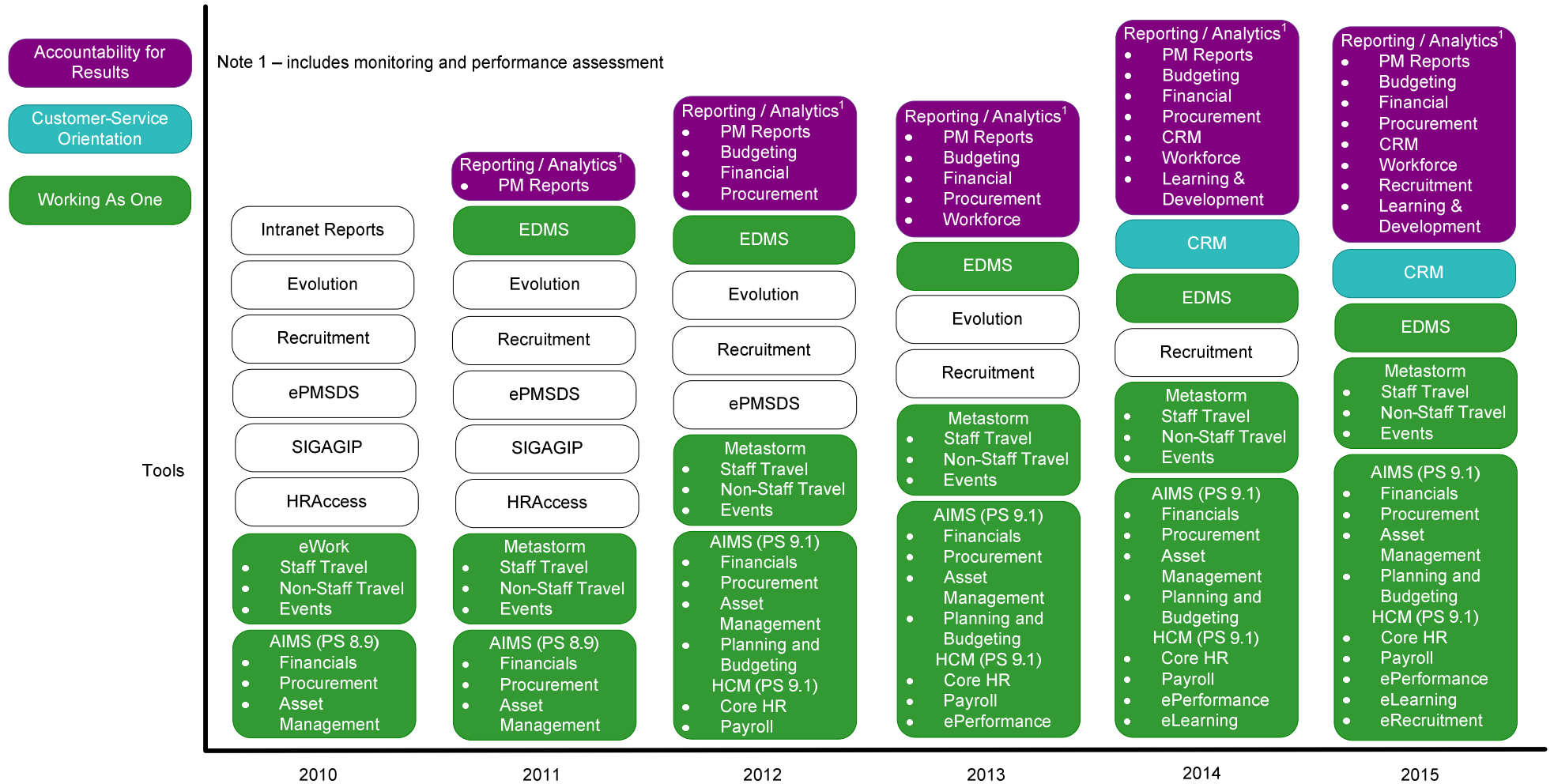- CRM solution footprint expanded and deployed during and after 2015;

- EPM analytics for Recruitment deployed during 2015.

34. Time will be allowed between each project to allow a period of stabilization after each solution is deployed and for a post implementation review to be performed. This ensures solutions are fully bedded-in and lessons learned are fed into future projects.

35. As can be seen from the schedule there are a number of projects and WIPO will only realize the full benefits through the successful completion of a combination of projects. Therefore, the Project Portfolio Board will be responsible for defining and measuring the achievement of benefits across all the projects.

36. As a result of the projects the footprint of WIPO's systems will gradually change, as shown in Diagram VI.
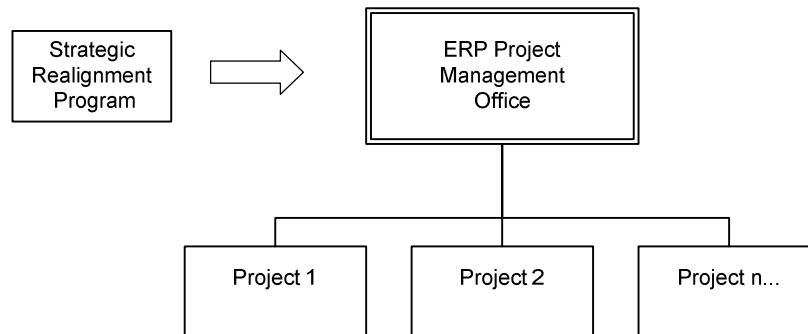
Diagram VI
WIPO's ERP Solution Evolution over time

Note 1 – includes monitoring and performance assessment

Accountability for Results

Customer-Service Orientation

Working As One

Tools

2010

Intranet Reports

Evolution

Recruitment

ePMSDS

SIGAGIP

HRAccess

eWork
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 8.9)
- Financials
- Procurement
- Asset Management

2011

Reporting / Analytics[1]
- PM Reports

EDMS

Evolution

Recruitment

ePMSDS

SIGAGIP

HRAccess

Metastorm
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 8.9)
- Financials
- Procurement
- Asset Management

2012

Reporting / Analytics[1]
- PM Reports
- Budgeting
- Financial
- Procurement

EDMS

Evolution

Recruitment

ePMSDS

Metastorm
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 9.1)
- Financials
- Procurement
- Asset Management
- Planning and Budgeting

HCM (PS 9.1)
- Core HR
- Payroll

2013

Reporting / Analytics[1]
- PM Reports
- Budgeting
- Financial
- Procurement
- Workforce

EDMS

Evolution

Recruitment

Metastorm
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 9.1)
- Financials
- Procurement
- Asset Management
- Planning and Budgeting

HCM (PS 9.1)
- Core HR
- Payroll
- ePerformance

2014

Reporting / Analytics[1]
- PM Reports
- Budgeting
- Financial
- Procurement
- CRM
- Workforce
- Learning & Development

CRM

EDMS

Recruitment

Metastorm
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 9.1)
- Financials
- Procurement
- Asset Management
- Planning and Budgeting

HCM (PS 9.1)
- Core HR
- Payroll
- ePerformance
- eLearning

2015

Reporting / Analytics[1]
- PM Reports
- Budgeting
- Financial
- Procurement
- CRM
- Workforce
- Recruitment
- Learning & Development

CRM

EDMS

Metastorm
- Staff Travel
- Non-Staff Travel
- Events

AIMS (PS 9.1)
- Financials
- Procurement
- Asset Management
- Planning and Budgeting

HCM (PS 9.1)
- Core HR
- Payroll
- ePerformance
- eLearning
- eRecruitment

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VI.   PORTFOLIO ORGANIZATION AND GOVERNANCE

37.   An ERP Project Management Office (EPMO) will be established to oversee this strategic change program being delivered through a portfolio of interrelated and coherent projects, as set out in Chart I below.

Chart I: Portfolio Structure

```
┌──────────────┐              ┌──────────────────┐
│  Strategic   │              │   ERP Project    │
│ Realignment  │   ═════▷     │   Management     │
│   Program    │              │     Office       │
└──────────────┘              └──────────────────┘
                                        │
                      ┌─────────────────┼─────────────────┐
               ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
               │  Project 1   │  │  Project 2   │  │  Project n...│
               └──────────────┘  └──────────────┘  └──────────────┘
```

ERP Project Management Office

38.   The EPMO will define the tools, methodology, standards and quality by which all projects will be executed based on existing corporate ICT standards and policies. The EPMO will provide common planning and reporting processes and will bring structure and support to evaluating, justifying, defining, planning, tracking and executing projects. The EPMO will also help resolve cross project conflicts caused by limited resources and other constraints. The EPMO will work in close cooperation with ICT and the other areas of the Organization undertaking major IT initiatives.

39.   An ERP Project Management Office Manager (EPMO Manager) will be appointed (WIPO project official) who will be delegated responsibility for the day-to-day execution of the portfolio of projects by the PPB. The EPMO Manager oversees all of the projects, ensures coordination between the various projects and other SRP initiatives, ensures the standards, quality and consistency across the various streams of work. The EPMO Manager also providers leadership and acts as a mentor to the individual project managers. The key resources of the EPMO and their profiles are described in Appendix B.

Project Portfolio Board

40.   The ICT Board (currently being established by the Director General) will perform the role of the Project Portfolio Board (PPB). The PPB has overarching responsibility for the portfolio of projects and to ensure that they support the SRP objectives. It is accountable to the Director General for the successful implementation of the portfolio of projects. The PPB will ensure overall progress of the portfolio of projects, focusing on the realization of portfolio level business benefits, high level control of the portfolio of projects, defining and implementing a quality management strategy to ensure the portfolio of projects delivers results in accordance with stakeholder expectations.

41.   The PPB will provide the high level inputs which will guide the implementation of the portfolio of projects. Given the cross-functional nature of the projects and the decisions that would need to be taken, it is imperative to appoint a single Executive Sponsor (also called Senior Executive) who will chair the PPB and who is delegated

the authority by the Director General to take decisions that are necessary for effective implementation of all projects.

VII.   PROJECT ORGANIZATION AND GOVERNANCE

42.   For each project an organization structure will be implemented based on the structure as set out in Chart II below. In essence, each project will be run by WIPO with external assistance from an Implementation Partner.

Chart II: Project Organization and Governance
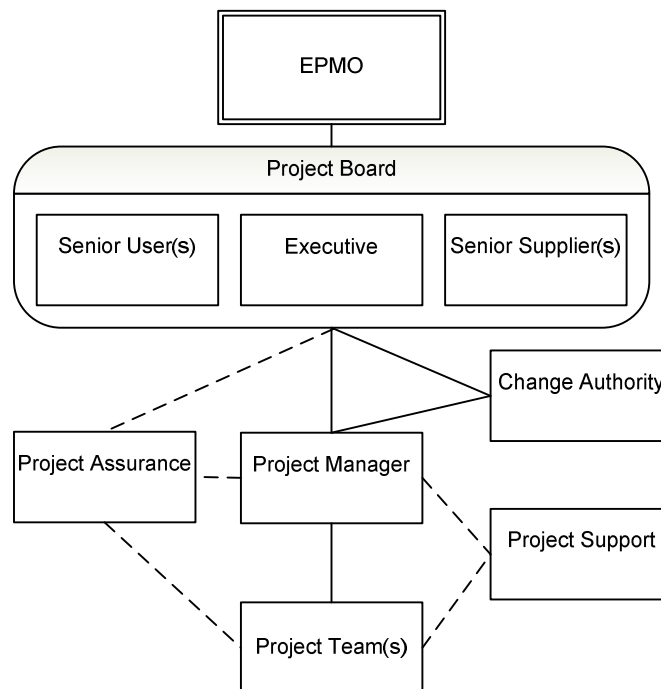
The entries appearing in Chart II are further defined and described below.

Project Board

43.   The Project Board will comprise senior officials who are responsible for the project, as delegated by the PPB, and who exhibit the following four characteristics:

- •   Authority: to make decisions and to provide resources to the project;

- •   Credibility: ability to direct the project;

- •   Ability to Delegate: keeping the Project Board activity at the right level and allowing the Project Manager to manage the project;

- •   Availability: ensuring they are available to make decisions and provide direction.

44.   The Project Board will deliver the decisions and inputs which will guide the implementation of the project within the mandate set by the PPB. Given the cross-functional nature of the project and the decisions that would need to be taken, it is imperative to have a single Executive who, whilst supported by the Senior User(s) and Senior Supplier(s), is the key decision maker and is ultimately accountable for the project's success.

45.   The Senior User represents the interests of all those who will use the project's outputs. When a project covers many user interests more than one person may be required, but for the sake of effectiveness the role will not be split between too many people. The Senior User commits user resources to the project, specifies user requirements, monitors project outputs against requirements and liaises between users and the project.

46.   The Senior Supplier represents the interests of those providing and implementing the project's outputs. The role may be split between two people, an internal and external resource. The Senior Supplier provides supplier resources to the project, is accountable for the quality of project deliverables and liaises between the ICT department and the project.

VIII.   OVERVIEW OF THE CURRENT ERP SYSTEM

47.   WIPO operate a number of computer systems, many of which are legacy systems which have evolved over a number of years. WIPO's ERP platform (AIMS) is based on PeopleSoft / Oracle products which have been implemented in a phased manner since 2004, replacing a number of legacy standalone systems, and also integrating with many of the remaining systems.

48.   Appendix C provides a management overview of AIMS. It explains the history of AIMS, the projects that have been successfully completed to implement the modules currently being used, the functionality and processes covered by AIMS, a technical overview of where AIMS fits within the WIPO landscape of systems, including the main interfaces, and an explanation of the key system entities, set-up and configuration decisions that have been made.

IX.   OBJECTIVES OF THE PRESENT REQUEST FOR PROPOSAL

49.   The objective of this RFP is for WIPO to select and engage the services of a professional and experienced external service provider or partner to assist in the development of a coherent vision, conceptual design and a comprehensive plan for the implementation of an integrated ERP system at WIPO through a portfolio of projects.
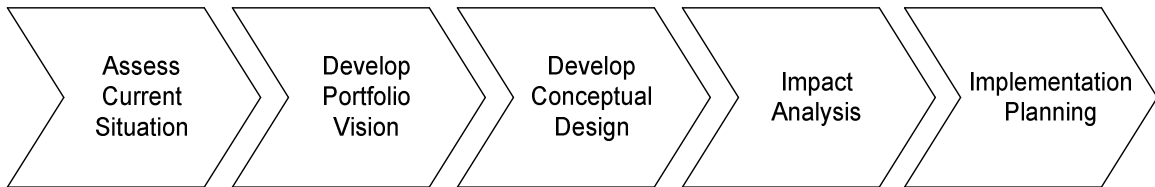
X.   SCOPE OF SERVICE PROVISION

50.   The successful service provider will be engaged as part of the EPMO and as such will be expected to comply with any appropriate EPMO standards. The service provider will work with EPMO project management and ERP resources and will be supported by the EPMO resources (see Appendix B for an indicative list of profiles) and will be provided with the necessary physical resources (office space, desks, computer equipment, meeting rooms) needed to perform the work on WIPO premises.

51.   Diagram VII provides an overview of the stages that the service provider will engage in and the key deliverables they will provide. Respondents should note that

WIPO will seek assistance from an independent party to provide verification and validation throughout the stages covered by this RFP.

Diagram VII – Partner Support Stages

Assess Current Situation	Develop Portfolio Vision	Develop Conceptual Design	Impact Analysis	Implementation Planning

Key Deliverables

- Understand Current Landscape
- Documented Assessment

- Stakeholder Interviews
- Facilitated Workshops
- Documented Final Vision

- Technical Interviews
- Documented Conceptual Design

- Documented Impact Analysis
- List of Quick Wins

- High Level Strategic Implementation Plan
- Implementation Project(s) RFP's

Respondents should note that whilst the diagram shows a sequential set of stages, in reality parts of one stage may overlap with another. Within each stage the services provided by the partner will differ, as follows:

Assess Current Situation (Expected Timeframe: 2-4 weeks)

52. The partner will perform a rapid and thorough assessment of the current PeopleSoft implementation. This assessment is primarily to help the partner understand the current landscape, configuration and usage of PeopleSoft within WIPO, and provides a necessary baseline for input into the future stages of work. The assessment must consider the current version of PeopleSoft being used, functionality available in the latest release of PeopleSoft and improvement opportunities already identified by WIPO.

53. The key deliverables provided by the partner from this stage are:

- Comprehensive understanding of the current landscape;

- A written assessment of the current PeopleSoft implementation, including a SWOT analysis to show the:
    - Strengths: things that should be retained, not changed and built on;
    - Weaknesses: areas where usage of PeopleSoft is weak or missing;
    - Opportunities: functionality we could switch on, configuration changes we could make or extra modules which could be easily justified and added;
    - Threats: risks that could impact the future because of inconsistencies between our current usage / configuration and the latest version of PeopleSoft or the future strategic direction of PeopleSoft development.

- A management presentation.

54. The partner will demonstrate their value to WIPO through the following:

- In depth functional and technical understanding of PeopleSoft v8.9 and v9.1 allowing the system setup / configuration to be examined without assistance from WIPO;

- A proven methodology / approach which allows a quick, focused and thorough evaluation of WIPO's implementation;

- Assessment experience by providing a balanced evaluation considering the history of the implementation, WIPO's growth and changing requirements, versions of PeopleSoft used and the rationale for past decisions.

Develop Portfolio Vision (Expected Timeframe: 6-8 weeks)

55. Prior to commencing any of the implementation projects a portfolio vision must be developed and agreed by WIPO. The partner will facilitate this process, gathering inputs from various stakeholders, facilitating workshops, challenging and questioning thinking to ensure that a comprehensive and sound vision is established in accordance with their methodology. WIPO estimates that this process will involve six groups, each consisting of 8-10 members, representing the various functional areas of the organization within the scope of the project, as well as an overall cross functional business group.

56. The key deliverables provided by the partner from this stage are:

- Interviews with various business stakeholders (individually or in groups) to gather their inputs / thoughts;

- Facilitate workshops to gain consensus (challenging and questioning thinking / ideas);

- Documented final vision – this will include helpful and clear substantive vision papers for each of the functional areas within the scope and a clear and concise approach to enterprise performance management and reporting (see paragraphs 23, 24 and 25 of the overall scope section);

- A presentation to Management of the vision.

57. The partner will demonstrate their value to WIPO through the following:

- Distilled experience from successful implementations in enterprise performance management and a demonstrated understanding of the key elements that need to be addressed in implementing an ERP system that places results at its core;

- Experience of working with other international organizations to develop an ERP vision;

- A proven methodology / approach that ensures a comprehensive and sound vision is developed and owned by WIPO.

Develop Conceptual Design (Expected Timeframe: 4 weeks)

58. Once the portfolio vision is agreed the partner will develop a conceptual design of an ERP solution and its constituent products and modules. This design must consider the existing PeopleSoft modules and legacy systems in use, as well

as the ICT Policies and Strategy, especially in relation to IT Security, which the solution must comply with.

59.   The key deliverables provided by the partner from this stage are:
- Interviews with various technology stakeholders to gather their inputs / thoughts;
- Documented conceptual design to support the portfolio vision.

60.   The partner will demonstrate their value to WIPO through the following:
- A solid understanding of the vendors product strategy and roadmap;
- Excellent technical skills and knowledge to allow them to openly discuss the many ICT facets with the various technical stakeholders;
- Credibility, experience and knowledge allowing them to identify conflicts / ICT changes that will be needed, the ability to communicate these to and convince the technical stakeholders to implement these changes;
- In depth knowledge of the Oracle product range, ensuring that the conceptual design consists of the most appropriate solutions that will deliver WIPO's portfolio vision;
- Credibility, by being able to convince the business stakeholders to accept the conceptual design.

Impact Analysis (Estimated Timeframe: 2 weeks)

61.   The future vision and conceptual design must be built upon a solid foundation. The existing PeopleSoft implementation at WIPO may need to be amended to provide an adequate foundation. For example, the current chartfield usage within the chart of accounts may not support the future vision / conceptual design. The partner will perform an impact analysis, using the baseline developed in the Assess Current Situation stage and will identify the changes needed to the existing implementation to provide a solid foundation. It is expected that this impact analysis will also identify quick wins that WIPO can adopt to support the vision, for example, configuration changes or unused functionality that can be enabled in the existing implementation and opportunities that WIPO can utilize when they start using the latest release of PeopleSoft.

62.   The key deliverables provided by the partner from this stage are:
- Documented impact analysis identifying the changes needed to the existing implementation to provide a solid foundation;
- List of quick-wins that WIPO can easily adopt to support the vision.

63.   The partner will demonstrate their value to WIPO through the following:
- Experience of performing an impact analysis on PeopleSoft v8.9, whilst recognizing the functionality available in the last release, v9.1, and the future strategic direction of PeopleSoft;

- Pragmatism, recognizing WIPO's current usage and maturity, the customizations implemented, the functionality which will be available when we upgrade and the vision, thereby producing a pragmatic list of opportunities to deliver early value.

Implementation Planning (Expected Timeframe: 2 weeks)

64.   In order to achieve the portfolio vision and conceptual design many implementation projects will need to be executed over a number of years. The sequence of these projects is very important to ensure that they are performed in a logical manner, taking advantage of identified quick-wins, minimizing any re-work, ensuring data quality and change management whilst also ensuring measurable business benefits are regularly achieved in a timely manner.   The partner will help WIPO to develop a high level strategic implementation plan to achieve the portfolio vision and conceptual design in the fastest, most efficient manner. The implementation plan will have the following key characteristics:

- A strong focus on delivering early value wherever possible e.g. an early value solution for results based planning and management to support the 2012/13 biennium;

- Each release of functionality focuses on external stakeholder value in addition to internally focused benefits;

- Projects are undertaken in logical sequence so as to minimize waste and re-work;

- Data quality initiatives are identified early on, planned for and resourced.

65.   The key deliverables provided by the partner from this stage are:

- A strategic implementation roadmap;

- A comprehensive implementation plan and resource estimates;

- Documented scope and content of the specific projects and initiatives to be undertaken within the plan. This must include the key benefits and measures / targets for each project (quantitative and/or qualitative);

- Key assumptions underlying the plan.

-

66.   The partner will demonstrate their value to WIPO through the following:

- Planning skills backed by solid experience of implementation and delivery, taking account of all considerations to achieve a strategic vision whilst delivering business value at regular intervals during the timeframe.

Proof of Concept

67.   Based on the priorities determined through the planning and vision process and the EPM strategy and roadmap, the successful partner may be asked to develop an early release, proof of concept, for the results based management functionality.

68.   The key deliverables provided by the partner from this stage are:

- Detailed specification of the prototype / proof of concept functionality;

- A working prototype.

69.   The partner will demonstrate their value to WIPO through the following:

- Drawing on their previous experience of developing and implementing results based management solutions.

XI.   PROFILE OF RESOURCES EXPECTED

- Business knowledge and experience implementing EPM, HCM and CRM solutions as part of large scale transformational projects;

- Understanding of Business Solutions architecture having utilized a mature methodology and framework on previous projects;

- Senior and experienced functional and technical resources, with a minimum of ten years experience covering PeopleSoft Financials and Human Resources versions 8.9 and 9.1;

- Experience of Oracle's diverse range of products, having worked in environments utilizing PeopleSoft, Hyperion, OBIEE and CRM;

- Up to date understanding of Oracle's product development strategy;

- Ability to understand, speak fluently and produce documents clearly in English; knowledge of French would be an advantage;

- Highly developed skills in facilitations, having helped at least one organization to develop a future vision for the PeopleSoft implementation;

- Superior analytical skills having assessed an existing PeopleSoft Financials implementation, understood the organizations future vision, helped to develop a conceptual design and then identifying the impacts on the existing implementation;

- Written and verbal communications, with the ability to present findings at both a technical and executive level;

- Individual references to clients where the proposed resources have demonstrated the above skills and experience. Please note that WIPO requires the full names and addresses of the above clients in order to contact each one of them directly. Consequently, every reference to be considered should be complete with the client name, address, phone number and contact point.

70.   WIPO reserves the right to interview and assess these proposed resources and reject them if not found satisfactory.

APPENDICES

APPENDIX A   Medium Term Strategic Plan
APPENDIX B   Key EPMO Resource Profiles
APPENDIX C   AIMS Management Overview

ABBREVIATIONS USED IN THIS TENDER

AIMS: Administrative Integrated Management Systems
CRM: Customer Relationship Management
EPM: Enterprise Performance Management
EPMO: ERP Project Management Office
ERP: Enterprise Resource Planning
HCM: Human Capital Management
HR: Human Resources
HRMD: Human Resources Management Department
ICT: Information and Communication Technology Department
IP: Intellectual Property
IT: Information Technology
OBIEE: Oracle Business Intelligence Suite Enterprise Edition
ODG: Office of the Director General
PMSDS: Performance Management and Staff Development System
RBM: Results-based Management
SMT: Senior Management Team
SRP: Strategic Realignment Program
UN: United Nations
WIPO: World Intellectual Property Organization