



Contract Engagement
Team Member

Engagement Lead

The Engagement Lead coordinates the transition between incoming and outgoing contracts, serving as the master coordinator who ensures that all activities occur on schedule and are supported by the Contract Engagement Team as needed, and escalates any transition-related issues to ISG Management.

Steps Involved In or Responsible For:

Create Transition Project Schedule

Works With: Contract Engagement Team

Process: The Contract Engagement Team will develop a “high-level” ISG Transition Activities Project Schedule Template with SLAs.

Conduct Contract Engagement Team Overview

Works With: Contract Engagement Team and CMS COR

Process: After the Solicitation is issued, the Overview can begin. The Engagement Lead will present topics to include:

- Review of the SOW and SOO as well as any transition related deliverables.
- Review of the ISG Roles and Responsibilities Matrix.
- Review of the “high-level” ISG Transition Activities Project Schedule Template with SLAs (timeline should account for protest and potential delays resulting from protest).
- Review of the ISG New Contractor Onboarding Checklist.
- Review of required documents and/or templates for obtaining user access to ISG systems (e.g., CMS system user request form, QNET Security Administrator Form, etc.)
- Review of the types of access needed for software and/or systems (e.g., SharePoint, QNET, ALM, etc.).

Create Contract Transition Plan

Works With: Contract Engagement Team and CMS COR

Process: The Contract Engagement Team will finalize and approve the timeline that will be used to determine the length of the transition period.

New Contract Kick-Off Meeting

Works With: Contract Engagement Team, HIDS, New Contractor, and CMS COR

Process: The CMS COR and Engagement Lead will conduct the Contract Kick-off Meeting with the Contract Engagement Team, New Contractor, and the HIDS Onboarding Lead.

Hold Contract Calls as Needed

Works With: Contract Engagement Team, New Contractor, HIDS, and CMS COR

Process: The Contract Engagement Team, New Contractor, CMS COR, and HIDS will schedule and conduct calls regarding the contract as needed. This includes any security or infrastructure meetings or calls that need to take place. This will ensure that the New Contractor has all necessary knowledge, templates, hardware, software, and security-related items.

Conduct Readiness Reviews

Works With: CMS COR, Contract Engagement Team, and New Contractor

Process: The CMS COR, Contract Engagement Team, and New Contractor will conduct several Readiness Reviews prior to the end of the transition period or the Outgoing Contractor’s contract end date. The results of the meeting are reported to the Contract Engagement Team.

Conduct Transition Lessons Learned

Works With: CMS COR, Contract Engagement Team, and New Contractor

Process: The Engagement Lead will conduct Lessons Learned with the New Contractor, CMS COR, and Contract Engagement Team. The Lessons Learned should identify process improvements or suggestions regarding the ISG New Contractor Onboarding Checklist.