

Exhibit 300: Capital Asset Plan and Business Case Summary

Part I: Summary Information And Justification (All Capital Assets)

Section A: Overview (All Capital Assets)

1. **Date of Submission:** 2010-03-18 18:59:06
2. **Agency:** 028
3. **Bureau:** 00
4. **Name of this Investment:** OCIO: Customer Relationship Management (CRM)
5. **Unique Project (Investment) Identifier:** 028-00-02-00-01-7006-00
6. **What kind of investment will this be in FY 2011?:** Full-Acquisition
 - Planning
 - Full Acquisition
 - Operations and Maintenance
 - Mixed Life Cycle
 - Multi-Agency Collaboration
7. **What was the first budget year this investment was submitted to OMB? ***
8. **Provide a brief summary and justification for this investment, including a brief description of how this closes in part or in whole an identified agency performance gap; this description may include links to relevant information which should include relevant GAO reports, and links to relevant findings of independent audits.**

The CRM program meets the basic need of providing centralized customer contact data across the entirety of the SBA. Currently there exists a gap between specific field offices with manual processes, field offices with database applications, and several disparate systems, all tasked with maintaining customer contact information for various areas of the agency. Beyond merely centralizing contact demographic data, CRM will provide the ability to easily track major performance metrics vital to the SBA such as: number of new lenders established, number of contact efforts made to customers, number of loans issued...etc. These reports are quickly available to individual users or they can be automated and standardized as a part of agency process.

 - a. **Provide here the date of any approved rebaselining within the past year, the date for the most recent (or planned) alternatives analysis for this investment, and whether this investment has a risk management plan and risk register.**
9. **Did the Agency's Executive/Investment Committee approve this request? ***
 - a. **If "yes," what was the date of this approval? ***
10. **Contact information of Program/Project Manager?**
 - **Name:** *
 - **Phone Number:** *
 - **Email:** *
11. **What project management qualifications does the Project Manager have? (per FAC-P/PM)? ***
 - Project manager has been validated according to FAC-PMPM or DAWIA criteria as qualified for this investment.
 - Project manager qualifications according to FAC-P/PM or DAWIA criteria is under review for this investment.
 - Project manager assigned to investment, but does not meet requirements according to FAC-P/OM or DAWIA criteria.

- Project manager assigned but qualification status review has not yet started.
- No project manager has yet been assigned to this investment.

12. If this investment is a financial management system, then please fill out the following as reported in the most recent financial systems inventory (FMSI):

Financial management system name(s)	System acronym	Unique Project Identifier (UPI) number
*	*	*

a. If this investment is a financial management system AND the investment is part of the core financial system then select the primary FFMIA compliance area that this investment addresses (choose only one): *

- computer system security requirement;
- internal control system requirement;
- core financial system requirement according to FSIO standards;
- Federal accounting standard;
- U.S. Government Standard General Ledger at the Transaction Level;
- this is a core financial system, but does not address a FFMIA compliance area;
- Not a core financial system; does not need to comply with FFMIA

Section B: Summary of Funding (Budget Authority for Capital Assets)

1.

Table 1: SUMMARY OF FUNDING FOR PROJECT PHASES (REPORTED IN MILLIONS) (Estimates for BY+1 and beyond are for planning purposes only and do not represent budget decisions)									
	PY1 and earlier	PY 2009	CY 2010	BY 2011	BY+1 2012	BY+2 2013	BY+3 2014	BY+4 and beyond	Total
Planning:	*	*	*	*	*	*	*	*	*
Acquisition:	*	*	*	*	*	*	*	*	*
Subtotal Planning & Acquisition:	*	*	*	*	*	*	*	*	*
Operations & Maintenance:	*	*	*	*	*	*	*	*	*
Disposition Costs (optional):	*	*	*	*	*	*	*	*	*
SUBTOTAL:	*	*	*	*	*	*	*	*	*
Government FTE Costs should not be included in the amounts provided above.									
Government FTE Costs	*	*	*	*	*	*	*	*	*
Number of FTE represented by Costs:	*	*	*	*	*	*	*	*	*
TOTAL(including FTE costs)	*	*	*	*	*	*	*	*	*

2. If the summary of funding has changed from the FY 2010 President’s Budget request, briefly explain those changes:

*

Section C: Acquisition/Contract Strategy (All Capital Assets)

1. **Table 1: Contracts/Task Orders Table**

Contract or Task Order Number	Type of Contract/ Task Order (In accordance with FAR Part 16)	Has the contract been awarded (Y/N)	If so what is the date of the award? If not, what is the planned award date?	Start date of Contract/ Task Order	End date of Contract/ Task Order	Total Value of Contract/ Task Order (M)	Is this an Interagency Acquisition? (Y/N)	Is it performance based? (Y/N)	Competitively awarded? (Y/N)	What, if any, alternative financing option is being used? (ESPC, UESC, EUL, N/A)	Is EVM in the contract? (Y/N)
SBAHQ09D0003	FFP: Firm Fixed Price	Y	2009-08-11	2009-08-11	2010-08-11	\$1.8	*	*	*	*	*
SBAHQ09C0032	FFP: Firm Fixed Price	Y	2009-09-14	2009-09-30	2010-09-30	\$1.8	*	*	*	*	*

2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:

*

3. Is there an acquisition plan which reflects the requirements of FAR Subpart 7.1 and has been approved in accordance with agency requirements? *

a.If "yes," what is the date? *

Section D: Performance Information (All Capital Assets)

Table 1: Performance Information Table

Fiscal Year	Strategic Goal(s) Supported	Measurement Area	Measurement Grouping	Measurement Indicator	Baseline	Target	Actual Results
2010	Ensure that all SBA programs operate at maximum efficiency and effectiveness by providing them with high quality executive leadership and support services	*	*	improved crm "vision areas"	0	4	tbd
2010	Ensure that all SBA programs operate at maximum efficiency and effectiveness by providing them with high quality executive leadership and support services	*	*	number of dds participated in either training, discussion, or design sessions for the purpose of maturing requirements for future development efforts	0	10	tbd
2010	Ensure that all SBA programs operate at maximum efficiency and effectiveness by providing them with high quality executive leadership and support services	*	*	major process design sessions	0	5	tbd
2010	Ensure that all SBA programs operate at maximum efficiency and effectiveness by providing them with high quality executive leadership and support services	*	*	crm access by sba staff	0	900	tbd

Part II: Planning, Acquisition And Performance Information

Section A: Cost and Schedule Performance (All Capital Assets)

1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline								
Description of Milestones	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
PROJ: Customer Relationship Management (CRM) - Development Sprint 2	\$0.2	\$0.2	2009-10-08	2009-10-09	2009-10-14	2009-10-09	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Development Sprint 1	\$0.2	\$0.2	2009-10-01	2009-10-01	2009-10-07	2009-10-07	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Full Production Transition Support (ARRA)	*	*	2010-04-01		2010-07-01		0.00%	0.00%
PROJ: Customer Relationship Management (CRM) - Development Sprint 3	\$0.2	\$0.2	2009-11-03	2009-11-03	2009-11-09	2009-11-10	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Development Sprint 4	\$0.2	\$0.2	2009-11-24	2009-11-24	2009-12-01	2009-12-01	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Development Release 5	\$0.2	\$0.2	2009-12-08	2009-10-07	2009-12-15	2009-12-15	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Provide Pilot Training	\$0.1	\$0.1	2009-11-03	2009-11-03	2010-03-09	2010-03-09	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) -	\$0.0	\$0.0	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%

1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline								
Description of Milestones	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
Acquire Windows Server Licenses (ARRA)								
PROJ: Customer Relationship Management (CRM) - Acquire Exchange Ent Licenses (ARRA)	\$0.1	\$0.1	2009-06-16	2009-06-16	2009-06-22	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Forefront Licenses (ARRA)	\$0.0	\$0.0	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Sharepoint Licenses (ARRA)	\$0.1	\$0.1	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Win Rights Mngmt Licenses (ARRA)	\$0.0	\$0.0	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Office Comm Sys Ent Licenses (ARRA)	\$0.1	\$0.1	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire Biztalk Licenses (ARRA)	\$0.1	\$0.1	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management	\$0.1	\$0.1	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%

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Description of Milestones	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
(CRM) - Acquire SQL Licenses (ARRA)								
PROJ: Customer Relationship Management (CRM) - Acquire CRM Licenses (ARRA)	\$1.3	\$1.3	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - Acquire System Ops Manager Licenses (ARRA)	\$0.0	\$0.0	2009-06-16	2009-06-16	2009-06-16	2009-06-16	100.00%	100.00%
PROJ: Customer Relationship Management (CRM) - CRM Travel Expenses (ARRA)	\$0.3	\$0.3	2009-11-03	2009-11-03	2010-02-02	2010-02-02	100.00%	100.00%

* - Indicates data is redacted.