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Federal Agency Migration Evaluation Quick Guides

Phase 2: Customer Agency Assessment

Overview of the Phase

The purpose of this phase is for a customer agency to evaluate and select an FSSP for Discovery.

	Agency	FSSP	FIT	OMB
2.1 Conduct market research (e.g., high-level 1:1 demos and conversations, FSSP Open House [hosted by FIT])	L	C	A	
2.2 Prepare & submit <i>Final Assessment Report</i> to FIT	L	C	A	
2.3 Begin <i>Discovery Readiness Checklist</i>	L	L	A	
2.4 Evaluate customer agency's <i>Final Assessment Report</i> recommending preferred FSSP	A		L	
2.5 Provide recommendation to OMB on customer agency's preferred FSSP	A		L	
2.6 Provide concurrence/non-concurrence on customer agency's preferred FSSP based on FIT's recommendation	A		A	L

Major Process Steps

- L = Lead • Organization(s) responsible for completing the activity and engaging stakeholders
- C = Contribute • Provides resources and consults with the Lead to complete the activity
- A = Advise • Stakeholder(s) responsible for providing input and guidance



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Phase 2: Customer Agency Assessment (Continued)

Key Considerations

- ☑ FSSPs often request information from customer agencies during the market research step, such as transaction volumes, number of users, services sought, current platform and hosting information and statutorily unique requirements. (2.1)
- ☑ The Federal Financial Management Shared Services Catalog should be leveraged to select desired financial management services. (2.2)
- ☑ The customer agency can only initially recommend one FSSP to meet its migration needs. (2.2)
- ☑ While all documents will not be complete at the time the *Discovery Readiness Checklist* is submitted, the start date of Discovery is contingent upon having identified proposed completion dates for all documents. (2.3)
- ☑ When two leads are designated for a step, each organization is equally responsible for its completion. For practical matters, a document owner must be selected from the integrated project team. (2.3)
- ☑ During each phase of the FAME process, FIT reviews customer agency artifacts, makes a recommendation to OMB, and OMB provides concurrence/non-concurrence. If a customer agency would like to appeal FIT's recommendation and/or OMB's decision, it may do so by working with FIT to bring it to the Executive Oversight Committee within the Financial Marketplace Governance structure.
- ☑ Though most major process steps noted above may conclude before the next one begins, depending on the circumstances, some steps may execute concurrently.