1 Project Objectives

The objectives for this implementation are:

1. To prevent applicants from making common mistakes on their certification applications, thereby reducing the time they spend submitting applications, and the time client staff spends reviewing and approving the applications.
2. To run reports for key metrics on a daily, weekly, monthly, and quarterly basis.
3. To create and manage all events in CRM, thereby eliminating the need for a separate event management provider.

2 Success Criteria

The implementation will be successful if one or more of the following criteria are met:

1. The number of applications submitted with errors reduces from the current 50 percent to 25 percent or less.
2. All event registration occurs through CRM or the portal, regardless of whether the events have a cost associated with them.
3. The ten reports currently compiled in excel can be run in CRM on a daily, weekly, monthly, and quarterly basis.
4. Event registrations can be limited based on member status.
5. The system integrates with the Testing Vendor so that eligibility-to-test will be sent from CRM to the Testing Vendor and test results will be sent from the Testing Vendor into CRM automatically, without staff taking needing to action.

3 Top Ten Daily Tasks

The Project Objectives and Success Criteria aim to capture what the project team will do to enhance your business capabilities. The project team must make sure that in addition to enhancing these business capabilities, the new system also allows for the existing business capabilities. The following items are the top ten tasks for which the current system is used every day. The new system will allow for these tasks as well.

At go-live, staff will be able to complete the following tasks in the system.

1. Process initial and continuing certification applications.
2. Review/approve continuing education activities.
3. Pull reports.
4. Post batches to the company's accounting software.
5. Distribute general member communication.
6. Create events and manage registrations.
7. Track exam registrations.
8. Track exam results.
9. Generate verification of credential letters.
10. Generate .pdf certificates.

4 Typical Project Team

1. Project Management Officer: The Project Management Officer is responsible for overseeing the project, engaging outside resources, scheduling internal Cobalt resources, and keeping the project on track by removing obstacles that could slow down the project team in their efforts to push forward on project tasks.
2. Project Manager/Lead Consultant: The Project Manager/Lead Consultant handles the project plan, monitors the budget, and identifies and monitors project risks. The Project Manager/Lead Consultant is also responsible for defining the business requirements, producing the functional documentation, and overseeing the project quality assurance and training. The Project Manager will be the person who you interact with the most during the project.
3. Technical Lead: The Technical Lead acts as an internal check on the specifications being developed to make sure they fit within the confines of the product architecture and helps define detailed technical solutions when new functionality is required. The client may have limited interaction directly with the Technical Lead regarding very complicated functionality or an integration.
4. Consultant(s): Consultant(s) will be assigned to the project to assist the Project Manager/Lead Consultant with gathering and defining requirements, configuring the system, documenting custom functionality, and testing custom components.
5. Developer(s): Developer(s) will be assigned to the project to assist the Technical Lead with the development and delivery of the system.
6. SQL Developer: The SQL Developer is responsible for mapping and migrating data from the source system into your new database. You will interact directly with the SQL Developer on data mapping and data review calls throughout the project.
7. Support Lead: The Support Lead will assist with testing of custom components and will play an important role in end user training and system adoption. After the go-live transition is complete the Support Lead will be the person who you interact with the most for day to day support.
8. Executive Sponsor: The Executive Sponsor from your organization will act as a project advocate and provide leadership and direction for the project by participating in the definition of scope, reviewing budget and status updates, committing staff time for requirements gathering sessions and user acceptance testing, promoting open and honest communication between all project team members, and driving end user adoption.
9. Product Owner: The Product Owner from your organization works with the Project Manager/Lead Consultant to prioritize the product backlog, coordinates requirements gathering and end user acceptance testing sessions, reviews budget and status updates, and drives end user adoption. The Product Owner from your organization will be the person who the Project Manager/Lead Consultant interacts with the most during the project.
10. Subject Matter Experts: The Subject Matter Experts from your organization act as the authorities on a particular module or function of the system. The SMEs work with the Product Owner and Project Manager/Lead Consultant to provide details on requirements and play a very important role in user acceptance testing.

5 Assumptions

1. Future Upgrades – This plan assumes releases 1.0 and 2.0 will be running Microsoft Dynamics 2015 and that any upgrades to a newer, yet to be released, version of CRM will occur after release 2.0.
2. Project Management – We are budgeting 3 hours on average per week for project management tasks. Cobalt will provide weekly project status updates and will establish a designated time for a weekly project update call to discuss any questions or concerns.
3. Timelines – The dates in the timelines after release 1.0 were used to map out an overall release plan and Cobalt resource allocation. They will likely fluctuate as we get closer to each release. Cobalt will include an updated timeline in each release work authorization.
4. Holidays – For the purposes of all timelines, we are excluding both US, Canadian and Provincial holidays.

6 Project Management Constraint Priority

The three constraints for software development projects are Schedule, Scope, and Cost. The priority for this project is Schedule because all events need to be managed within CRM prior to the annual conference in July of this year.

7 Risks

1. End user acceptance after go-live.
2. Performance during the peak event registration period.

8 Stakeholders and Responsibilities

The stakeholders involved in this project are:

1. Customer.
2. Cobalt.
3. Integration Vendor.

The chart below details each stakeholder's responsibilities in this project.

Responsibility	Stakeholder(s)
Prioritize Requirements	Customer
User Acceptance Testing	Customer
Custom Development	Cobalt
System Testing	Cobalt
Project Management	Cobalt, Customer
Develop and Test Integration	Cobalt, Customer, Integration Vendor
Gather and Translate Business Requirements	Cobalt, Customer
System Setup & Configuration	Cobalt, Customer
Data Migration	Cobalt, Customer
Training	Cobalt, Customer
Credit Card Processor Setup & Configuration	Cobalt, Customer

9 The Cobalt Implementation Methodology

Cobalt does its best to adhere to the principles of agile software development by following these four main tenants:

Individuals and interactions over processes and tools

Working software over comprehensive documentation

Customer collaboration over contract negotiation

Responding to change over following a plan

While the items on the right have value and are necessary, we value the items on the left more and believe they are the key to a successful software project. This approach to software implementation means the project team can introduce a change down the road with agility and minimal cost, time, and effort.

9.1 Project Management

Cobalt will work with you continuously to manage the timeline, scope, and costs throughout the project. Cobalt sends weekly project status updates to you to ensure that we are always on the same page. These updates detail the tasks Cobalt accomplished the previous week, the tasks Cobalt aims to achieve in the current week, any client needs, upcoming deadlines, risks, and a report on hours spent vs. hours remaining in the work authorization. If a conversation is needed about any of these items, your Project Manager will mention that in this weekly report.

9.2 Discovery & Initial System Setup/Configuration

Cobalt begins each project by first installing and configuring the product to meet as many needs as possible before writing a single line of code. Cobalt uses the Product Functionality Matrix to establish the scope of features that the client intends to use. This tells us what functional areas of the system need to be configured. During the time Cobalt is configuring the system, you can expect us to ask lots of questions about the business logic driving various functional areas. You should set aside time from your various Subject Matter Experts to answer these questions.

Once the initial configuration is complete, Cobalt will train you on your "base" system. You will then have several days to walk through the system yourself, completing as many business tasks as possible with the existing functionality. We will ask you to submit a list of tasks you cannot complete or tasks you can complete, but require alterations. This identifies any gaps in functionality that need to be filled during the development phase of the project. These remaining requirements will define the scope that will drive the iterative development.

9.3 Iterative Development

Once the scope (aka project backlog) has been defined, Cobalt will begin to document, develop, and test the system in small iterations, involving the client as much as possible throughout the development process. Cobalt will work with the client to define the first iteration of the system focusing on the highest priority items.

Once the first iteration is complete, Cobalt will present it to the client for user acceptance testing and review. Cobalt will meet with the client to review the functionality and solicit feedback. We encourage the customer to provide feedback as part of the process. This is not the case in a traditional software development methodology where the focus would be on rigidly testing against the specifications for defects or bugs.

This process is repeated for all iterations until we have a release candidate ready for final testing.

9.4 Quality Assurance

Cobalt's quality assurance starts with our documentation. As part of each iteration, Cobalt will create comprehensive test cases that define the system functionality.

After all of the coding is complete, the application is tested by the Consultants who created the original documentation. The system is tested against the test cases and all issues and questions are reported back to the implementation team on a daily basis. Once the system has passed all of the tests, the system is delivered to the client for user acceptance testing. This ensures that the client can effectively test the entirety of the application. The development, Consultant testing, and User Acceptance testing are all done on separate instances of your system so that while you are testing one iteration, Cobalt can move forward with the development of the next iteration.

9.5 Training

Proper planning before the start of the deployment and training phase is absolutely critical to ensure a smooth transition from an existing set of systems and processes to the new system. Cobalt will work with the client's product manager before the system is deployed to approve the training plan, including the schedule of any on-site training and training documentation. While this is taking place the client needs to work with their internal end users on change management, so that there is a clear expectation of what Cobalt will be delivering to them, when, and why.

9.6 Data Conversion

Data migration begins with the data mapping phase which is kicked off with a data mapping meeting between the client and Cobalt. During this meeting the record types and fields that are integral for the function of the current iteration are identified and mapped to the appropriate CRM entities and fields. Then the client's data is converted based on the data mapping feedback as part of key iterations throughout the development phase. After the data mapping phase is completed the data review phase begins. During the data review phase the client reviews the data in their test CRM and regularly meets with Cobalt to communicate any needed data changes and corrections. These regular data review meetings continue until the data meets the client's needs for the release. This results in a smooth transition when the data is transferred to the production system just prior to cut-over.

9.7 Production Deployment

Cobalt will work with the client to plan for the physical deployment of the new system to the client's location or a co-located data center facility as well as the timing for the final data cut-over. Cobalt will

conduct a meeting with the client to transition the project from implementation team to the account management team.

After the code is deployed to production, the system is considered to be in Support mode. Any issues or requests will be channeled through our Support department. As new feature requests are made through Support, we will create a new development backlog, and when the client is ready, we will start the next implementation.

10 Project Tools

10.1 TeamworkPM

TeamworkPM is Cobalt's project management tool. We use this to manage the project's timeline, milestones, non-development tasks, files, and risks.

10.2 FogBugz

Cobalt uses FogBugz to manage the project backlog and push requirements through the documentation, development, and quality assurance processes. Requirements will get pushed through FogBugz using Cobalt's standard workflow. Cases will move from new to documentation, to customer review and approval, to development, to Cobalt quality assurance, to end user testing and validation. Functional documentation, development notes, test case steps, and end user testing feedback will all be tracked in FogBugz, making it easy to see the status and progression of all requirements.

11 Communication Agreement

Critical to the success of an agile implementation is client communication and flexibility. The timeline will be based on these expectations. As per the Cobalt-Customer kickoff call, this is how the project team will communicate:

11.1 TeamworkPM

The project team will concentrate most written communication via TeamworkPM. This will keep all referencable information in a central place that can be accessed by the entire project team. Having this easily accessible repository will expedite the implementation.

11.2 Email

The project team will use email for simple questions, to request and share information, and to recap phone calls and meetings for future reference. Weekly updates will be sent by email as well. The team will respond to most emails within one business day.

11.3 Phone Calls

The project team will use phone calls for complex questions, to discuss functionality in detail, and to quickly reach someone for time-sensitive information. The team will respond to most phone calls within one business day.

11.4 Meetings

Most meetings will be held via WebEx or in-person. The project team will aim to schedule WebEx meetings within one week of the meeting request date and in-person meetings within two weeks of the meeting request date

11.5 Quality Assurance Feedback from Customer

As per the Cobalt-Customer kickoff, staff members who are not on the core project team, but from whom Quality Assurance feedback is necessary, require 2 weeks' notice for testing feedback.

12 Appendices

12.1 Code Signoff Document

Code sign-off is required prior to training and final data migration. Below is a sample of the code sign-off document.

Final Code Sign-off

This document will serve as a mutual agreement by the customer and Cobalt that customer has tested the code on the production environment as implemented pursuant to the Work Authorization and in accordance with the relevant documented specifications and that customer is satisfied with the performance of the code on the production environment. The code on the production environment will not change prior to go live and Cobalt will train customer on the system and functionality as it exists as of the date of the execution of this Agreement. If customer requests a code change after signature of the code sign-off document a new work authorization will need to be signed requesting a service release after final project sign-off.

12.2 Project Signoff Document

Final project sign-off is required prior to go live. Below is a sample of the project sign-off document.

COBALT FINAL PROJECT ACCEPTANCE AGREEMENT ("Agreement")

This Agreement is made this __ day of __, 20__ by The Cobalt Company ("Cobalt") and the _____ ("Customer"), Cobalt and Customer are sometimes collectively referred to as the "Parties."

The Parties hereto agree as follows:

1. Customer and Cobalt executed that certain _____ work authorization dated _____, 20__, which is referred to as the "Work Authorization".

2. Cobalt has completed all of the services under the Work Authorization.

3. Customer has had the opportunity to test the Cobalt Software Products ("Cobalt Software") as developed and/or implemented for Customer pursuant to the Work Authorization and in accordance with the relevant documented specifications ("Implemented Cobalt Software") and hereby agrees as follows:

   (1) Customer is completely satisfied with the performance of the Implemented Cobalt Software and;

   (2) Customer hereby accepts the Implemented Cobalt Software as provided by Cobalt and agrees that Cobalt has fulfilled all of its obligations under the Work Authorization and;

   (3) Customer agrees to pay for all hours spent by Cobalt for the delivery of the Implemented Cobalt Software as a result of the Work Authorization and any subsequent instructions received from the Customer;

   (4) Customer has elected to start using the Implemented Cobalt Software with the functionality as it exists as of the date of the execution of this Agreement and;

   (5) Cobalt is released from any and all obligations under the Work Authorization and;

   (6) Customer acknowledges that all future warranties of Cobalt related to the Implemented Cobalt Software shall be only as provided under the Cobalt Software License Agreement or Cobalt Software-as-a-Service Agreement as applicable to this Engagement and;

   (7) Customer understands that any non-warranty work performed by Cobalt on the Implemented Cobalt Software after the date of this Agreement will be billable pursuant to the terms of the Cobalt Support Agreement or Cobalt Software-as-a-Service as applicable to this Engagement.

4. Customer hereby authorizes Cobalt to release the current Customer code base as it tested in the UAT environment to the Cobalt production servers to be available at _____ and _____.

5. Customer hereby acknowledges that all data conversion is not subject to any warranty by Cobalt and all data changes will be billed at Cobalt's current hourly rates.

In Witness, the Parties hereto have executed this Agreement as of the date first above written.