Project Implementation Checklist – New Implementation

[Project Manager Name]

[Date]

The purpose of this document is to have a quick and easy visual representation of the progress of a new project implementation of Cobalt's software.

Kick-Off

The kick-off phase of the project initiates the project by introducing the project team, defining the project timeline, identifying the risks, and outlining the project objectives and success criteria.

- ☐ Review the work authorization, the contract, and any custom functionality discussed during the sales process with the sales team.
- ☐ Set up project tasks with estimates in Replicon.
- ☐ Project Plan in TeamWorkPM. Include the commonly seen risks and mitigation strategies for risks that apply to this project.
- ☐ Create a project record in CRM. Set the Work Authorization Signed, Total Authorized Hours to the total hours in the work authorization, Estimated Consulting hours to the total hours to be spent by all departments except development, set the Estimated Development hours to the total hours to be spent by the development department. Create a work authorization record linked to the project. Enter the type, hours, and date signed. If any addendums are signed over the course of the project create work authorization records for those of type addendum.
- ☐ Review the product functionality matrix with the customer and establish which modules will be used.
- ☐ Draft Project charter, including identifying objectives, success criteria, constraints, and project risks.
- ☐ Get Project charter signed and put signed copy in CRM attached to the project record.
- ☐ Kick-off meeting. At the kick-off we should discuss the importance of the following: assigning a good PM on the client side who can organize and coordinate resources and has the authority to make decisions and prioritize functionality, client taking responsibility for end user adoption,

staying as close to the base product as possible, doing training as early as possible in the project (especially CRM and system admin training).

- ☐ Send customer documentation regarding importance of user acceptance testing and end user adoption.

Weekly Updates

Throughout the course of the project we need to send a weekly update that includes the plan for the week, needs from the client, upcoming deadlines, risks, and a budget summary to keep the customer abreast of the progress on the project. The weekly update is tracked in CRM.

Initial Configuration

During the initial configuration phase of the project we set up the base system and configure as many requirements as possible using CRM and base Cobalt functionality. Requirements that cannot be fulfilled using CRM or base Cobalt functionality are tracked in FogBugz.

Product Installation

- ☐ Set up development, stage, and UAT servers.
- ☐ Install base products.

Discovery & Configuration

- ☐ Document business logic for each module and configure modules based on use cases and scenarios.
- ☐ Migrate first round of data into base system. Assess quality of source data and discuss any issues with customer as early as possible in the project.
- ☐ Customer walkthrough of configured system.
- ☐ Define custom requirements and track in FogBugz.

Iteration Planning

- ☐ Group FogBugz cases into iterations.
- ☐ Get development estimates and reduce scope if necessary.

Implementation

During the implementation phase of the project we take action to complete the tasks outlined in the work authorization and the project plan. As documentation, development, and quality assurance are completed we need to closely monitor scope, timeline, budget, and risks.

Documentation

- ☐ Documentation and customer approval of FogBugz cases (move cases from documentation in progress, to customer review, to customer approval in FogBugz).
- ☐ Review the Project charter and work authorization and verify the documentation ties back to the project objectives and success criteria and that no new risks have been introduced and that specifics outlined in the work authorization are accounted for in the documentation.

Development

- ☐ Development of FogBugz cases (move cases to ready for development then to development complete in FogBugz).
- ☐ Sweetification: Add icons and views for all new entities and make sure sitemap is updated appropriately.
- ☐ Blog Post Ideas: Throughout the development process the team should hold brainstorming sessions to talk about ideas for good blog posts. This should occur during all code reviews and spring review meetings.

Data Migration

- ☐ Migrate data for custom build functionality.
- ☐ Complete at least one round of QA using migrated data.

QA

- ☐ Set up customer in Zendesk and provide CRM and system admin training before user acceptance testing begins.
- ☐ Quality assurance of FogBugz Cases & bug fixes (move cases to testing, then to resolved or back to ready for development in FogBugz).
- ☐ Regression testing with involvement from the customer's support lead & update regression test cases. Regression testing should be done with migrated data whenever possible.

- ☐ Walkthrough of Fogbugz cases with customer. This is required for an initial implementation. There is no waiving of the walkthrough.
- ☐ Review the Project charter and work authorization and verify the functionality ties back to the project objectives, success criteria, and top 10 daily tasks, and that no new risks have been introduced and that specifics outlined in work authorization have been implemented.
- ☐ Configure security roles and users and ensure customer is testing using each role.
- ☐ User acceptance testing & customer feedback (move cases to closed or reopened in FogBugz).

Go-Live Prep

The go-live prep phase of the project closes out the implementation phase and begins the transition to go live. During this phase the customer and the support team are trained on the new functionality and prepared for go live and the customer acknowledges that the scope of work outlined in the work authorization is complete.

Production Configuration & Testing

- ☐ Set up production server.
- ☐ Test live credit card processing.
- ☐ Test live email.
- ☐ Turn all integrations to live mode and test.
- ☐ Verify all cron jobs are set up correctly and tested.
- ☐ Regression testing with involvement from the customer's support lead & create/update regression test cases.
- ☐ Unmanaged solution so client can make customization changes. This should be on the production environment only. The publisher should be Cobalt and the prefix should be customerprod.
- ☐ Finalize security roles and users.
- ☐ Review the Project charter and verify the functionality ties back to the project objectives and success criteria and that no new risks have been introduced.

Customer Training

- ☐ Code sign-off and put signed copy in CRM attached to the project record.

- ☐ Customer training.
- ☐ User Manual access and 1-page document (“cheat sheet” or “quick reference guide”) for each of the top 10 daily tasks.

Cobalt Training & Documentation

- ☐ Support walkthrough.
- ☐ Practice production rollout & documented rollout steps.

Formal acceptance & Support/Hosting or SaaS Effective Date

- ☐ Final project sign-off. The customer should sign first, then Kristen and Russ. The template used for this must come directly from the Master Services Agreement for the customer.
- ☐ Take a backup of production after project sign-off, before the final data migration.
- ☐ Get the support, hosting, and/or SaaS agreements signed with the effective dates.

Go-Live

During the go-live phase of the project the final round of data is migrated and the customer begins to use the new system. Post go-live support from the project team is critical to ensure end user adoption of the new system and a smooth transition to support.

Schedule

- ☐ Schedule the go live with the client and the support team.
- ☐ Schedule an appropriate amount of post go-live support time.

Go Live

- ☐ Final data migration. Take a backup when final migration is complete, before system is live.
- ☐ Post go-live support.
- ☐ Ask Russ and/or support to setup scheduled backups.
- ☐ Confirm with the technical lead that the unmanaged solution from the development environment is added to source control so it can be backed up.

Project Closure & Customer Satisfaction

During the project closure and customer satisfaction phase of the project all documentation is finalized and archived and the project is analyzed so the successes and failures of the project can be used for future reference.

Administrative Tasks

- ☐ Close project in Replicon.
- ☐ Close milestone(s) in FogBugz. Verify that all cases in that milestone are either closed or moved to another milestone. Make the milestone "not assignable" in FogBugz.
- ☐ Save project sign-off document in CRM attached to the project record.
- ☐ Move work authorization to the completed folder.
- ☐ Hold internal lessons learned meeting with project team.
- ☐ Blog Post Ideas: During the post project debrief the team should talk about ideas for good blog posts.
- ☐ Send customer final project hours.

Measure Customer Satisfaction

- ☐ Send survey to customer concerning the project. Refer back to the objectives and success criteria in the charter.
- ☐ Notify the Cobalt Product Manager (Amir) so he can send the customer the Microsoft Reference. Coordinate with the customer so they are expecting to receive the survey.

Create case study/blog post

- ☐ If of sufficient size and scope create a case study and/or blog post about the interesting aspects of the release and how we leveraged our product or CRM.