Project Methodology

Delivering Successful Projects
Adapt, Improve, Repeat

To inspire organisations to innovate and reach new levels of success.

Document Control

Date	Name	Version	Comments
25 Feb 2021	Ty Osborne	1.0	Creation of the document from previous presentation slides
8 Feb 2022	Dharmesh Rowee	1.2	Updating content under project governance
1 Mar 2023	Dharmesh Rowjee	1.3	Updating project phases
25 May 2023	Dharmesh Rowjee	1.4	Added the project control workbook

This document contains confidential or proprietary information which may not be used or disclosed without permission.

Table of Contents

Our Story

Brainstorm specialise in creating custom software solutions for businesses of all sizes. Our team of experienced developers and consultants work closely with our clients to understand their unique needs and deliver software that is tailored to their specific requirements.

Project Methodology and Phases

We deliver our projects using BrainStorm's Project Methodology for Software Development, Implementations, and Upgrades, adhering to all project governance requirements.

Brainstorm has adopted a Hybrid Project Management Methodology that combines the best of both Agile and Waterfall project management approaches. This approach allows us and our clients to capitalise on the strengths of both methods while mitigating their weaknesses. Our hybrid project management approach includes improved project planning and execution, increased adaptability to change, and better risk management.

By using agile techniques such as iterative development and daily stand-up meetings, teams can respond quickly to changes and deliver high-quality work. Meanwhile, using waterfall techniques such as comprehensive planning and structured processes ensures that the project remains on track and on budget. Overall, hybrid project management allows teams to strike a balance between flexibility and structure, enabling them to deliver projects efficiently and effectively.

Remote Project Delivery

The BrainStormProject Methodology has been designed for the delivery of successful projects remotely without the need for the project team to be in the same physical locations. All of the tools described in this methodology are intended to be delivered and implemented in such a way that they can be accessed anywhere at any time, by all members of the project.

It is important the methodology tools be used, to ensure governance and keep everyone informed of the current state.

Timeline

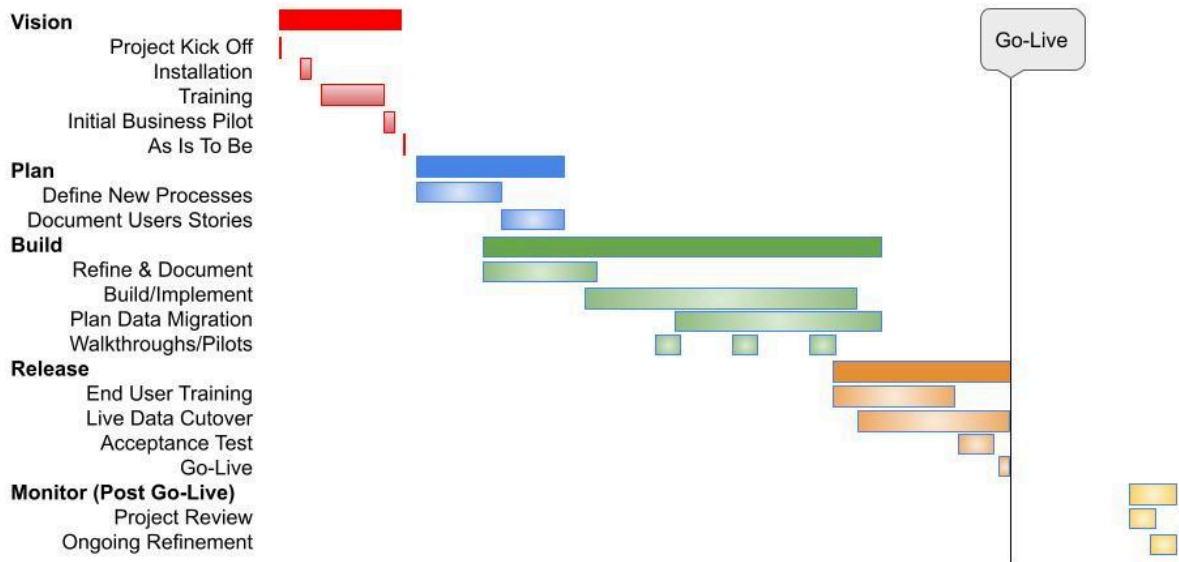This conceptual diagram illustrates the estimated duration of each phase vs other phases of the project.

Figure 1 - BrainStorm Project Methodology Timeline (sample)

Project Phases

BrainStorm Project Methodology viewed from a Phase and Activity perspective. The following diagram shows the Project Management component of the BrainStorm Deployment Methodology acting as an overarching governance framework around the Implementation components:
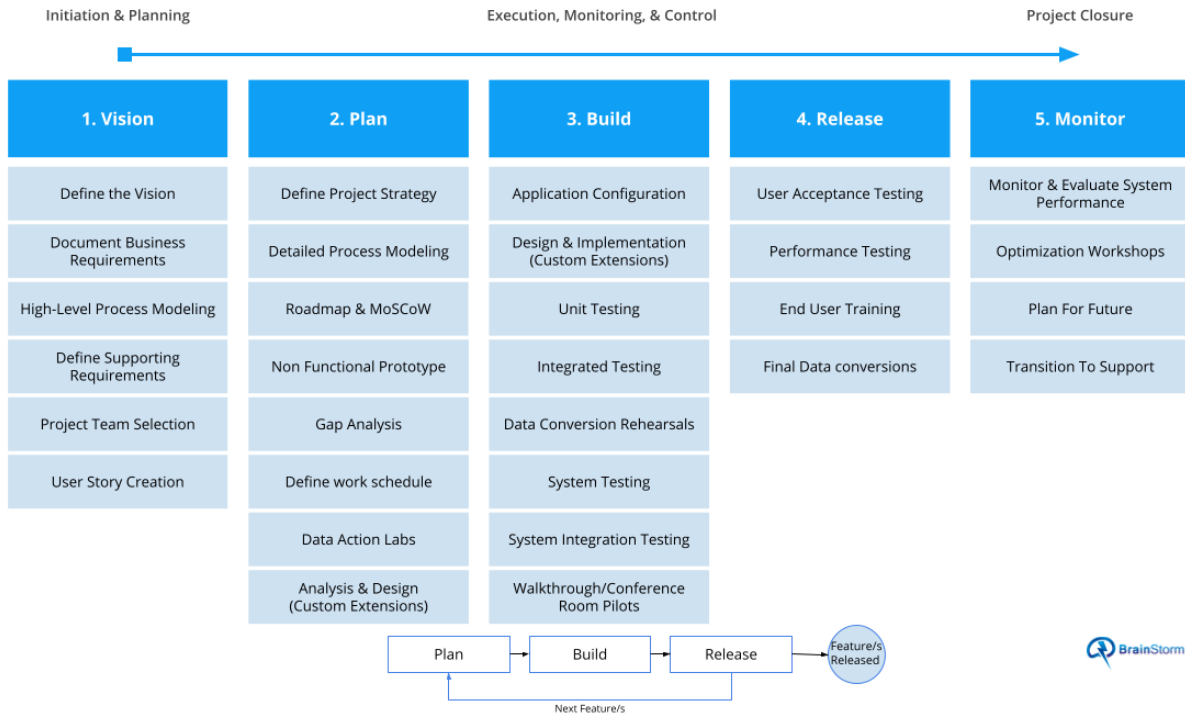
Initiation & Planning		Execution, Monitoring, & Control		Project Closure
1. Vision	**2. Plan**	**3. Build**	**4. Release**	**5. Monitor**
Define the Vision	Define Project Strategy	Application Configuration	User Acceptance Testing	Monitor & Evaluate System Performance
Document Business Requirements	Detailed Process Modeling	Design & Implementation (Custom Extensions)	Performance Testing	Optimization Workshops
High-Level Process Modeling	Roadmap & MoSCoW	Unit Testing	End User Training	Plan For Future
Define Supporting Requirements	Non Functional Prototype	Integrated Testing	Final Data conversions	Transition To Support
Project Team Selection	Gap Analysis	Data Conversion Rehearsals		
User Story Creation	Define work schedule	System Testing		
	Data Action Labs	System Integration Testing		
	Analysis & Design (Custom Extensions)	Walkthrough/Conference Room Pilots		

Plan → Build → Release → Feature/s Released

Next Feature/s

Figure 2 - BrainStorm Project Methodology Phases

Vision - The primary goal of the Vision phase is for all stakeholders to gain a mutual understanding and create the high-level vision of the project. This will be used to clearly define the objectives for the project. This is a critical phase for all projects because the scope of the effort, the high-level requirements and the significant risks must be understood before the project can proceed.

Plan – The Business Process flows are reviewed and planned changes are documented. In some cases, prototypes and/or wireframes are built and validated. Data action labs are performed to define values for the tables within the system. This is a great chance for the client to review all existing processes and identify opportunities for improvement.

Build – Build Phase is to take the confirmed business process flows, and begin to configure, document and build the final system prior to testing. The walkthroughs are also done as features or departments pass testing reach a level of stability.

Release – Release phase is to take the configured solution from installation onto the production system through the Acceptance Test process ready for go-live processing.

Monitor – The monitor phase is to operate the newly developed system, assess the success of the system and support the users. The Monitor phase involves the agreed period after go-live where BrainStorm supports the client as they take complete ownership of the system.

Project Governance

Project Quality Assurance

Following the phased approach outlined in the BrainStorm Deployment Methodology allows the business to complete, on the whole, business as usual activities in parallel with this project.

During the project, BrainStorm in conjunction with the project team will develop a specific version of the following documents/manuals to help guide the project QA:

- Project Plan stating objectives, identified risks and their mitigation strategies.
- As-is process and Future State Process model (to-be)
- Business Blueprint (this is the main design document from the design phase)
- Data Migration Plan / Data conversion plan
- Project Timeline/Schedule
- Issues Log
- User Acceptance Test Plan
- Readiness Review

As part of the project preparation and project kick-off, BrainStorm will share and/or provide the required documents and templates, which are relevant to the agreed project approach.

This section describes the control and procedures in place to manage the project.

Kickoff Meeting

Once the project team has been selected, a kickoff meeting will be held, bringing together all team members. The kickoff meeting addresses the key project components that will ensure we deliver the project as per stakeholders' expectations. The session will also ensure that everyone present is aware of the project objectives, timelines and are given the chance to ask any questions about the project.

Project Schedule

Company size, internal resources, level of involvement and our custom approach will all have a bearing on the time to implement the proposed solution. The Project Schedule will be comprehensive, detailed, include dependencies and have a clearly defined

critical path. It will be maintained throughout the project and reviewed at Steering committee meetings.

Project Meetings

Following each progress meeting, it is expected that key action lists will be produced as the minutes of the meeting by the BrainStorm Project Manager and circulated to all project team members.

Meeting's agenda includes:

- Overall Project Update and Progress (Project Scope, Time and Budget review)
- Approve previous Minutes
- Issues raised
- New Risks identified
- Review of change requests raised
- Other Project related discussions

Weekly Project Team Meetings

The complete detailed project plan will not be reviewed formally at Project Team Meetings. However, the Project Managers will report the detailed milestones since the last team meeting. Project Issues and matters listed in the Project report will also be reviewed at each meeting. This meeting also gives project team members a forum to raise any concerns or ask for assistance.

Steering Committee (Steercom) Meetings

A steering committee will be established in the early stages of the project. The steering committee will meet on a monthly basis to review the project direction, progress, timeline and budget vs actual.

Envisaging the Future State

As the project moves forward, all team members will have ideas as to how their work environments could be redefined with streamlined processes facilitated by the new system. At this stage, we wish to capture those ideas and document their vision for the proposed future state. Typically, we write the vision for each area on a digital whiteboard that remains prominently available for the duration of the project. This exercise is called the As Is / To Be workshop. This serves as a constant reminder of the Team's ultimate objectives and also serves to provide a check to ensure the Team's activities are focused on building that future state.

Walkthroughs

From time to time, end-to-end business walkthroughs (often referred to as Conference Room Pilots) will be used as a key tool for measuring project progress and identifying unaddressed issues. These sessions can also help build confidence in the project for the steering committee members who might not be involved in the day to day activities.

It is worth discussing how walkthroughs should be structured, the preparation required and who should attend.

The Issue Log

This register will hold every issue and concern raised during the project. It will include small details such as; the company logo needs to appear on our invoices, data needs to be exchanged to a particular external system or there are fields on the purchase order receiving form that we don't need to see.

Customizations & Development Request Forms

Although out of the box options or existing additional modules should be fully explored before resorting to development or changes, the resolution of some issues may require a simple form customisation, some serious development or something in between. When this happens, the team member must complete a Work Request form detailing the customisation or development they wish to complete. They will reference the underlying issue number, briefly describe the business case and provide the details of what is required. Each request will be reviewed by the client's Project Manager, authorised as required and assigned to an appropriate resource. As BrainStorm primarily uses rapid development tool sets, many of these requests could be channelled to the client's internal team, other more complex tasks could be passed to BrainStorm for Development.

Documentation Resources

A shared Google Drive Folder will house all documentation associated with the project, including; The Issues Register, Team Selection sheets, As Is/To Be, Process documentation and anything else created for the project. BrainStorm Staff will be pre-configured with access to this folder. Your implementation team will need a free Google account to request access to this folder. Folder to be shared after project Kickoff.

Issues Register

A draft issues register will be created for us throughout the entire project. This Google sheet will be the primary indication of how much work is remaining on the project. It is important all issues, requests, enhancements are recorded from day 1.

Risk Management

A risk management document template is designed to help the project manager document and address identified risks throughout the project. The document is pre-populated with some examples.

Change Requests

The primary aim of the project is to fulfil the project objectives as stated. However, it is unlikely that the implementation will occur without requests for change, whether 'minor'

or 'major' requests. The Project Managers shall be notified immediately, or as soon as possible, of all change requests arising from work carried out as part of the project.

'Scope Creep' is where a project overruns its agreed timescale and budget due to many extra minor or major requirements being added. For this reason, the BrainStorm project Manager will log all change requests in the Issues list, and ensure a Work Request document is written up seeking approval from the client. Work Requests that are deemed out of original scope will clearly indicate that there will be additional charges and will have a time and/or price estimate.

Project Schedule Changes

A scheduling tool is used to schedule consultants' calendar dates allocated to this project as identified within the Project Plan and will be communicated to the client's internal Project Manager. The scheduling of consultant services as part of the implementation is complicated by a number of factors, including the availability of the project team and staff at the right times throughout the project.

It is for this reason that requesting and scheduling consultants' services is performed well in advance of the specified dates to avoid scheduling conflicts.

Project Closure and Post Go-Live Review

Project closure is formally agreed upon after an approved specified period following the first live Month.

The objective of project closure is to ensure the project is finalised in a controlled and organised manner. The project closure activities include:

- Review of the success of the project management and delivery based upon the objectives and scope defined in this document, including deviations from the original project plan and estimated costs
- Handover to the BrainStorm Support Team (additional support agreements may need to be discussed)
- Handing over all responsibilities relating to this implementation project to the client or designated person.
- Documentation of all information that may be beneficial to future project phases
- Agreed closure or plan-of-action for subsequent activities

It is the joint responsibility of the Clients Project Sponsor and BrainStorm Project Manager to approve the closure of the project.

Brainstorm's project control workbook.

We manage software development projects via our proven project methodology by implementing structured processes, defining roles and responsibilities, setting clear

goals and objectives, and monitoring progress throughout the project lifecycle.

Change Management

The implementation of a new system is typically accompanied by related changes to how the organisation completes their standard processes, which in turn can lead to significant changes to how the related departments function, and how individuals perform their duties. This is often a desirable outcome because the new system is acting as a catalyst for the required changes that an organisation wants to make to achieve their objective. However, one of the most common reasons for the failure of IT projects (CIO Magazine – Sept 2017 – Why Projects Fail) is a lack of awareness and understanding of the organisational change aspects of the project.

BrainStorm Project Methodology Change Management Discipline highlights four key areas that should be considered by executives, the project team, the project sponsor, managers and project managers:

People Management
Setting individual performance expectations, assessment and selection, training and supporting individuals so that they may perform effectively.

Communication
Delivering the right messages to the right people at the right times so that they are able to align their work with the strategy.

Risk Management
Identifying and managing the risks and impacts associated with the change.

Leadership and Sponsorship
Engaging leadership to drive change throughout the organisation.

The Organisational Change Management discipline begins at the strategic level with Executives and then identifies the specific human and organisational challenges related to the new system in order to create a project specific, time-sensitive, and cost-effective approach to managing organisational change.

Data Migration

Data Conversion is an important part of any project and a defined discipline within the BrainStorm Project Methodology. The sequence of tasks relating to data conversion activities are defined. See Appendix B for more details.

Training Methodology

The implementation approach will see all team members acquire knowledge of ALL core aspects of the new system. It is necessary that each team member obtains a complete understanding of how their sphere of interest interacts with all other functions within an integrated system. This is expected to be a combination of online, remote and on-site classroom training.

As required, key users will receive further detailed training in their respective solution components in preparation for workshops to develop the optimum business processes.

Training

Under the BrainStorm Project Methodology several training options can be considered for an organisation where the business prepares for going live. These can be tailored to suit the organisation:

- BrainStorm will provide training to the core project team members who can then train their respective business sections and confirm their roles as the key internal resource for business guidance and first-line support. This type of training is called Train the trainer.
- BrainStorm Team also delivers training to end users based on documents developed for the business processes throughout the project. Unless otherwise agreed in writing, this type of training is an addition to the project scope.

Training Aids

The main training aids offered by BrainStorm are:
- Classroom training for core system functions
- Where applicable online training websites to help lower the cost of onsite training fees. This is an excellent resource for core team members to further learn basic and additional functionality.
- User manuals as required
- On-site ad-hoc training with a consultant from BrainStorm
- Specific workshops stepping through various scenarios with a consultant.
- Training can also be remote and/or in different locations
- On-site training as requested
- Off-site training as requested
- Short recorded sessions for end-users as requested.

Training Plan Document

A detailed training plan will be prepared following team selection and project kickoff.