



Pythagoras Project Implementation Methodology

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Authors:	Jo Savidge
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Preface

This document describes the Pythagoras Project Implementation Methodology which is used across all projects within Pythagoras.

Who should read this document

This document should be read in detail by the clients Project Team, Project Sponsor and Project Manager and the Pythagoras Project Team.

Status

The status of this document is issued.

Version Control

Each version of this document will be given a number. A log will be kept of significant changes as shown below:

Date	Version No.	Description of Amendments
31/07/08	V1.0	First Draft
07/08/08	V1.1	Issued post PM workshop 07/08
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Table of Contents

PROJECT METHODOLOGY	3
STAGE 1 – INITIATION	5
<i>Phase 1: Sales Handover - Objectives</i>	5
<i>Phase 1: Sales Handover - Deliverables</i>	5
<i>Phase 2: Scoping Study - Objectives</i>	6
<i>Phase 2: Scoping Study - Deliverables</i>	6
STAGE 1 PROJECT MANAGEMENT & QA CONTROLS.....	6
STAGE 2 – ELABORATION.....	7
<i>Phase 3: Solution Design Phase - Objectives</i>	7
<i>Phase 3: Solution Design Phase - Deliverables</i>	7
STAGE 2 PROJECT MANAGEMENT & QA CONTROLS.....	8
STAGE 3 – EXECUTION	9
<i>Phase 4: Development - Objectives</i>	9
<i>Phase 4: Development - Deliverables</i>	9
STAGE 3 PROJECT MANAGEMENT & QA CONTROLS.....	10
STAGE 4 – TRANSITION.....	10
<i>Phase 5: Deployment and Go Live - Objectives</i>	10
<i>Phase 5: Deployment and Go Live – Deliverables</i>	10
STAGE 4 PROJECT MANAGEMENT & QA CONTROLS.....	11
STAGE 5 – OPERATION	12
<i>Phase 6: Support Handover - Objectives</i>	12
<i>Phase 6: Support Handover - Deliverables</i>	12
<i>Phase 7: Project Handover - Objectives</i>	12
<i>Phase 7: Project Handover - Deliverables</i>	12
STAGE 5 PROJECT MANAGEMENT & QA CONTROLS.....	13

Project Methodology

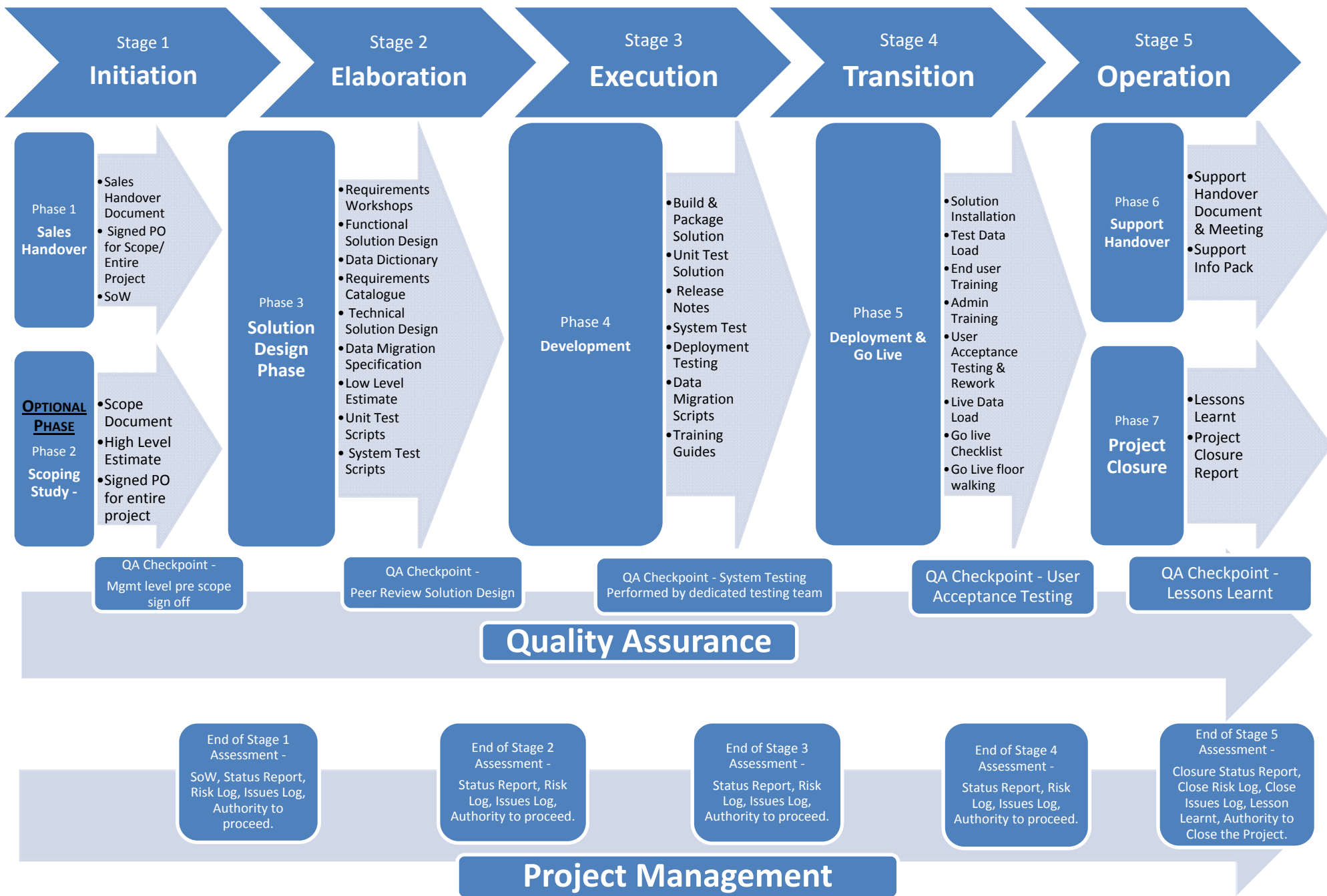
The Pythagoras project management methodology is based on PRINCE2 (**PR**ojects **IN** Controlled **E**nvironments). PRINCE2 is the internationally recognised standard method for project management and offers a structured and scalable approach to IT projects.

The key features of PRINCE2 are:

- Its emphasis in dividing the project into controlled and manageable stages and phases, offering a structured, consistent and proven approach
- Its scalability and flexibility which ensures that it can be applied to various different types of IT Projects
- Its defined organisational structure (roles and responsibilities)
- Its focus on business justification

Using PRINCE2 the project is broken down into stages and phases. The project follows the “management by exception” principle whereby the Project Manager is delegated management responsibility for a stage only and seeks authority to proceed from the board prior to initiating the next stage during the end of stage assessments.

The following diagram illustrates the Pythagoras methodology graphically.



Stage 1 – Initiation

The Initiation stage is broken down into two phases; Phase 1 – Sales Handover and Phase 2 – Scoping Study, the scoping study phase is an optional phase which the client may request to enable Pythagoras to provide a more accurate estimate. Both phases are described below:

Phase 1: Sales Handover - Objectives

The objective of this phase is to handover the project from the Pythagoras sales team to the Pythagoras services team. This phase is necessary to ensure that all team members are fully briefed on the project objectives, identified benefits, identified risks and project commercials. The phase also includes the definition and agreement of the Statement of Work (SoW) document. The SoW is a document which describes the framework of the project. This critical document includes:

- Identification and agreement of project scope objectives, and benefits
- Assessing and communicating project risks to Client Name
- Clearly defining the scope of Pythagoras’s and Client Name’s efforts and responsibilities,
- Identification and agreement of project management and quality control procedures including project reporting mechanisms and frequency,
- Approval of project approach, plan, deliverables and budget, and identification of project controls
- Confirmation that the hardware infrastructure at Client Name is sufficient to meet the needs of this project.

Phase 1: Sales Handover - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D1	Sales Handover Document	An internal document which the sales team provide to the services team. This document provides the services team with the core details regarding the client, the project and any background information.	Pythagoras	N/A	N/A
D2	Signed PO for Scoping Study / Entire Project	A signed purchase order document from the client confirming the services and software for either a scoping exercise or the entire project (without scoping).	Client Name	N/A	N/A
D3	SoW	The SoW defines the services and deliverables to be supplied under the contract of work. It also details the project implementation methodology, the issue resolution process, change control process and other such procedures.	Pythagoras	Client Name	Timely SoW sign off, including base lined project plan.

Phase 2: Scoping Study - Objectives

The objective of this phase is to conduct a brief scoping study to identify the key functional requirements (with associated estimates) which meet the core business objectives. This typically involves a series of business analysis workshops and a write up exercise.

Phase 2: Scoping Study - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D4	Scoping Document	The purpose of this document is to identify the scope of phase 1 to enable the planning and budgeting of this phase.	Pythagoras	Client Name	Attendance during workshops, timely scoping study sign off.
D5	High Level Estimate	An estimate of the services for delivery of the requirements documented in the scoping document	Pythagoras	N/A	N/A
D6	Signed PO	PO to cover services and software detailed in D5	Client Name	N/A	N/A

Stage 1 Project Management & QA Controls

During Stage 1 various quality assurance and project management activities are executed, as follows:

Project Management control check point:

At the end of each stage a formal assessment will take place with the assigned project board to gain authority to precede to Stage 2 (this is called the End of stage 1 assessment).

Project control documents that are presented to the board are as follows:

- Risk Log
- Issues Log
- Project Plan
- Status Report
- SoW

Quality Assurance check point

Management Level sign off – PO and Scoping document

Stage 2 – Elaboration

The Elaboration stage includes one phase; Phase 3 – Solution Design Phase. The objectives and deliverables are described below.

Phase 3: Solution Design Phase - Objectives

The objective of this phase is to define the requirements identified in Stage 1. This will be achieved by completing a series of detailed workshops. During each workshop Pythagoras will update a requirements catalogue, which lists each functional requirement. At the end of each workshop Pythagoras will work with the client to rationalise the list of requirements and identify quick wins to assist with user buy in. The requirements catalogue is then updated during a subsequent write up exercise to include the following:

- Requirement solution (which describes how each functional requirement will be met)
- Solution category; such as workflow or configuration
- Effort estimate

The requirements catalogue, coupled with the data dictionary is then used to create the Functional Solution Design (FSD) document. In addition to the above, the FSD document also includes details regarding business process flows, conceptual data models, and screen shots where appropriate. In the event that a technically complex requirement is captured Pythagoras will conduct a technical solution design and proof of concept exercise. The intention of this exercise is to demonstrate a functioning solution; thus building user buy in and ensuring solution fit; whilst also reducing project risk.

Phase 3: Solution Design Phase - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D7	Requirements Workshops	Workshops are conducted between Pythagoras as the clients super users to discuss the business areas identified in the SoW	Pythagoras	Client Name	Attendance at workshops and requirements catalogue rationalisation meeting
D8	Functional Solution Design Document	A Functional Solution Design Document will be prepared that describes the functionality to be provided to meet the business needs.	Pythagoras	N/A	N/A
D9	Data Dictionary	A data dictionary will set out the data elements to be held within CRM.	Pythagoras	N/A	N/A
D10	Requirements Catalogue	A catalogue of all requirements which are captured during the analysis workshops, and a short description of the functional	Pythagoras	N/A	N/A

		solution.			
D11	Technical Design (where appropriate)	A technical solution design document maybe prepared for all build items which require programmatic changes to the core MSCRM product, such as reports, integration to other systems etc.,	Pythagoras	N/A	N/A
D12	Data Migration Specification	A specification of the data to be migrated and of the routines required to achieve the migration will be developed.	Pythagoras	N/A	N/A
D13	Low Level Estimate	An estimate of the effort required to build the solution as per D8 - D11.	Pythagoras	N/A	N/A
D14	Unit Test Scripts	Test scripts will be developed for Unit Testing.	Pythagoras	N/A	N/A
D15	System Test Scripts	Test scripts will be developed for System Testing	Pythagoras	N/A	N/A

Stage 2 Project Management & QA Controls

During Stage 2 various quality assurance and project management activities are executed, as follows:

Project Management control check point:

At the end of each stage a formal assessment will take place with the assigned project board to gain authority to precede to Stage 3 (this is called the End of stage 2 assessment).

Project control documents that are presented to the board are as follows:

- Risk Log
- Issues Log
- Project Plan
- Status Report

Quality Assurance check point

Peer review – Functional Solution Design and Technical Solution Design Documents.

Stage 3 – Execution

The Execution stage includes one phase; Phase 4 – Development. The objectives and deliverables are described below.

Phase 4: Development - Objectives

During this phase the changes to the core system identified in Functional and Technical Solution design documents will be created and the Dynamics CRM security model implemented.

Throughout the system build, Pythagoras will perform a series of tests on the solution to ensure that the built system has been designed as per Dynamics CRM best practice. This will normally include a midpoint review with the client’s project team to cross check that expectations are being met.

Phase 4: Development - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D16	Build & Package Solution	The solution will be built and packaged accordingly. The built solution will include all compiled code, SQL reporting services reports, XML configuration files, exported XML workflows etc., as per the Functional and Technical Solution Design Documents.	Pythagoras	N/A	N/A
D17	Unit Test Solution	The solution is unit tested to ensure each component is fit for purpose	Pythagoras	N/A	N/A
D18	Release Notes	For more complex configurations release notes will be issued which details the deployment instructions.	Pythagoras	N/A	N/A
D19	System Testing	The solution is system tested to ensure the entire system is fit for purpose.	Pythagoras	N/A	N/A
D20	Deployment Testing	For more complex configurations deployment testing will be completed as per the release notes.	Pythagoras	N/A	N/A
D21	Data Migration Scripts	The data migration scripts will be configured to import the data into Dynamics CRM as per D12	Pythagoras	Client Name	Delivery of cleansed de duplicated source data as stipulated in D12.
D22	Training Guides	Bespoke training guides as defined in D3	Pythagoras	N/A	N/A

Stage 3 Project Management & QA Controls

During Stage 3 various quality assurance and project management activities are executed, as follows:

Project Management control check point:

At the end of each stage a formal assessment will take place with the assigned project board to gain authority to precede to Stage 4 (this is called the End of stage 3 assessment).

Project control documents that are presented to the board are as follows:

- Risk Log
- Issues Log
- Project Plan
- Status Report

Quality Assurance check point

- Unit tested completed against unit test scripts.
- System Testing completed by dedicated testing team against system test scripts.

Stage 4 – Transition

The Transition stage includes one phase; Phase 5 – Deployment and Go Live. The objectives and deliverables are described below.

Phase 5: Deployment and Go Live - Objectives

The objective of this phase is to prepare for Go Live. This includes the following activities:

- Solution Installation
- Data Load
- User and Administrator training
- User Acceptance Testing – conducting real life business simulations to ensure fit for purpose, usually this involves Pythagoras support consultancy to assist with the successful support transition during phase 6
- Go Live assistance

Phase 5: Deployment and Go Live – Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D23	Solution Installation	The configured solution is installed along with the vanilla CRM server application and clients	Pythagoras	Client Name	Roll out the CRM client software as required having shadowed Pythagoras.
D24	Test Data Load	Load test data into testing system ready for UAT.	Pythagoras	Client Name	Delivery of cleansed de duplicated source data as stipulated in D12.
D25	End User Training	Complete end user training to super users to enable the super users to train the user base.	Pythagoras	Client Name	End User Training & setup of training environment

D26	Admin Training	Complete Admin training to System Administrators.	Pythagoras	Client Name	Setup of training environment
D27	User Acceptance Testing	Thoroughly test the solution using UAT test scripts (D14) which should encompass real life business simulations to ensure it is fit for purpose. Feedback UAT findings to Pythagoras.	Client Name	Pythagoras	Ad hoc assistance. UAT spreadsheet template.
D28	User Acceptance Fixing	Complete UAT fixes on site as defined in D27 which are in scope as per D8.	Pythagoras	N/A	N/A
D29	Live Data Load	Live data load into live system ready for Go Live.	Pythagoras	Client Name	Delivery of cleansed de duplicated source data as stipulated in D12.
D30	Go Live Checklist	A checklist document which identifies the switch over tasks from the current system to the new solution	Client Name	Pythagoras	Assistance with CRM switch over activities
D31	Go Live Floor walking	Ad hoc training and technical assistance to ensure a smooth and successful go live.	Pythagoras	Client Name	Super Users to assist with floor walking within separate teams.

Stage 4 Project Management & QA Controls

During Stage 4 various quality assurance and project management activities are executed, as follows:

Project Management control check point:

At the end of each stage a formal assessment will take place with the assigned project board to gain authority to precede to Stage 5 (this is called the End of stage 4 assessment).

Project control documents that are presented to the board are as follows:

- Risk Log
- Issues Log
- Project Plan
- Status Report

Quality Assurance check point

User Acceptance Testing against User Acceptance test scripts.

Stage 5 – Operation

The Operation stage includes two phases; Phase 6 – Support Handover and Phase 7 – Project Closure. The objectives and deliverables of each phase are described below.

Phase 6: Support Handover - Objectives

The objective of this phase is to successfully transfer the project to support mode; which is achieved by conducting a detailed handover process from UAT involvement, support documentation, and finally a handover meeting between the Pythagoras consultancy team to the support team.

Phase 6: Support Handover - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D32	Support Handover Meeting	A meeting which is conducted internally at Pythagoras transferring the project from consultancy to support. This includes support handover document.	Pythagoras	N/A	N/A
D33	Support Info Pack	A document which details support portal login details, Pythagoras support telephone and email addresses	Pythagoras	N/A	N/A

Phase 7: Project Closure - Objectives

The objective of this phase is to formally close the project. This is achieved by conducting a project closure meeting which is similar to an end of stage assessment, however instead of obtaining authority to proceed from the project board; authority to close the project is requested.

The project closure meeting examines the project risk log, issues log; project plan, ROI measures and lessons learnt which is all documented in a project closure report.

Phase 7: Project Closure - Deliverables

Ref	Deliverable	Comments	Primary Owner	Secondary Owner	Secondary Owner Responsibilities
D34	Lessons Learnt	A document which both Pythagoras and the client compile which details the lessons that have been learnt during the project	Pythagoras	Client Name	Document client's lessons learnt.
D35	Project Closure Report	A document which compiles the all of the project control documents and versions and officially sets the status on all to close.	Pythagoras	Client Name	Authority to close is obtained.

Stage 5 Project Management & QA Controls

During Stage 5 various quality assurance and project management activities are executed, as follows:

Project Management control check point:

At the end of stage 5 Pythagoras request authority to close the project from the project board.

Project control documents that are presented to the board are as follows:

- Risk Log (at closure)
- Issues Log (at closure)
- Project Plan (at closure)
- Status Report (at closure)
- Project Closure Report (encompasses all of the above and sets status to closed for all)

Quality Assurance check point

Lessons Learnt Report.