

# Service Product Description

## Project Delivery Services



### Professional Services

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# Introduction and Scope

TopSpeed Professional Services has adopted a defined methodology to control project development processes. This methodology can be applied to any size project and will assist you in maintaining control of the development cycle and your reporting requirements. The scope of this handout and presentation is to provide an overview of the process and to define our expectations of a TopSpeed Developer. Together we can create a process which provides the quality of service our clients deserve.

## Benefits

A structured development process will provide both the developer and the client a template to determine and track the current status of any project. Each phase will provide a set of deliverables (outputs) to be expected by the clients. These phases will require sign-off by the client which will provide written documentation of satisfactory deliverables.

## Service Expectations

Each participant in a project has a set of service expectations which are expected to be met in a satisfactory manner. Listed below are the primary service expectations for the client, the developer and the TopSpeed Project Managers.

### Client Service Expectations

- Timely updates on project schedule and budget status
- Explanation/approval of tasks completed for time spent
- Correct and timely billing statements (generated from developer timesheets)
- Quality development (i.e.; based on specifications, testing, and deliverables)
- Clear path for escalation of issues regarding development

### Developer Expectations

- Clear, concise list of specifications and expected deliverables
- Clear path for escalation of issues regarding development
- Support process in place for issue resolution
- Timely payment for work completed

### TopSpeed Project Manager Expectations

- Open dialog with developers regarding projects and development
- Timely reporting of project status, time and potential escalation issues
- Verifiable output for time billed—listing tasks completed during specified time periods
- Professional demeanor, especially while on site

# Core Project Delivery Services

## Delivery Process Overview

The delivery process is based on a combination of the waterfall approach and Rapid Application Development (RAD), since the Clarion tool lends itself so well to prototyping. The ability to provide a client with a visual representation (prototype) of the intended application as the specifications are being developed provides a better understanding of the business processes and workflow necessary for a quality application. Each of the checkpoints or milestones listed in the documentation indicate a point for review of the schedule, budget and status of the application. A responsibility matrix indicates who is responsible for which functions in the development process.

## TopSpeed Delivery Methodology

### General Principles

TopSpeed's project delivery methodology consists of a series of phases. We take the format deliverable approach so necessary for project management from the waterfall approach and combine it with the flexibility of the iterative Rapid Application Development (RAD) approach within a phase. These phases do not follow the strict "Waterfall" approach of finishing one step before going onto the next, but rather consist of a series of overlapping building blocks which can be performed in an iterative fashion.

### Delivery Process

The series of phases have been incorporated into a "Phased Checkpoint" concept. A Phased Checkpoint represents a major *checkpoint* or *milestone* at the end of a phase or group of phases where the status of the product is assessed, the issues and deliverables are reviewed and a "go/no-go" decision is accomplished.

The Phased Checkpoint Review at the end of a phase or group of phases will determine whether to approve, recycle, or defer the project. Listed below are the definitions of approve, recycle and defer:

1. *Approve*: allows the project to progress to the next phase (see note below)
2. *Recycle*: allows the project to repeat the phase(s) or a portion of the phase.
3. *Defer*: places the project temporarily on hold until such time as the issues which have caused this decision can be resolved (escalate to TopSpeed Project Manager)

***Note: The project charter will provide the guidelines on whether these checkpoints require sign-off before continuing to the next phase. This can change on a client-by-client basis. While TopSpeed will take an iterative approach to performing phases, the sign-off of a Phased Checkpoint will indicate completion of a phase.***

## Project Status and Communication

Effective communication processes are a critical component of project management. Listed below are the responsibilities required for exceptional communication.

### Developer Responsibilities

The Developer will provide weekly status reports on the tasks worked on, the tasks that were completed, and the expected tasks to be completed in the following week, along with any outstanding issues to be resolved. The information is incorporated into the project plan. This plan will be used to determine the project status. All issues should be assigned to a person for resolution. Project plan status reports should be provided according to the schedule outlined in the project charter.

### Client Responsibilities

A designated person should be assigned as the point of contact. This person will be responsible for getting back to the appropriate person (project manager and/or developer) within 48 hours with an answer to questions in the Phased Checkpoint requirements and/or other development issues. Timely responses are vital in maintaining project schedules.

A person should be identified as authorized to sign-off on the phase completion documents. This person should be provided the expected turn-around time for sign-off in the project charter.

The following chart, identified as Table 1, outlines the Phased Checkpoints that TopSpeed has identified as integral to the success of any project:

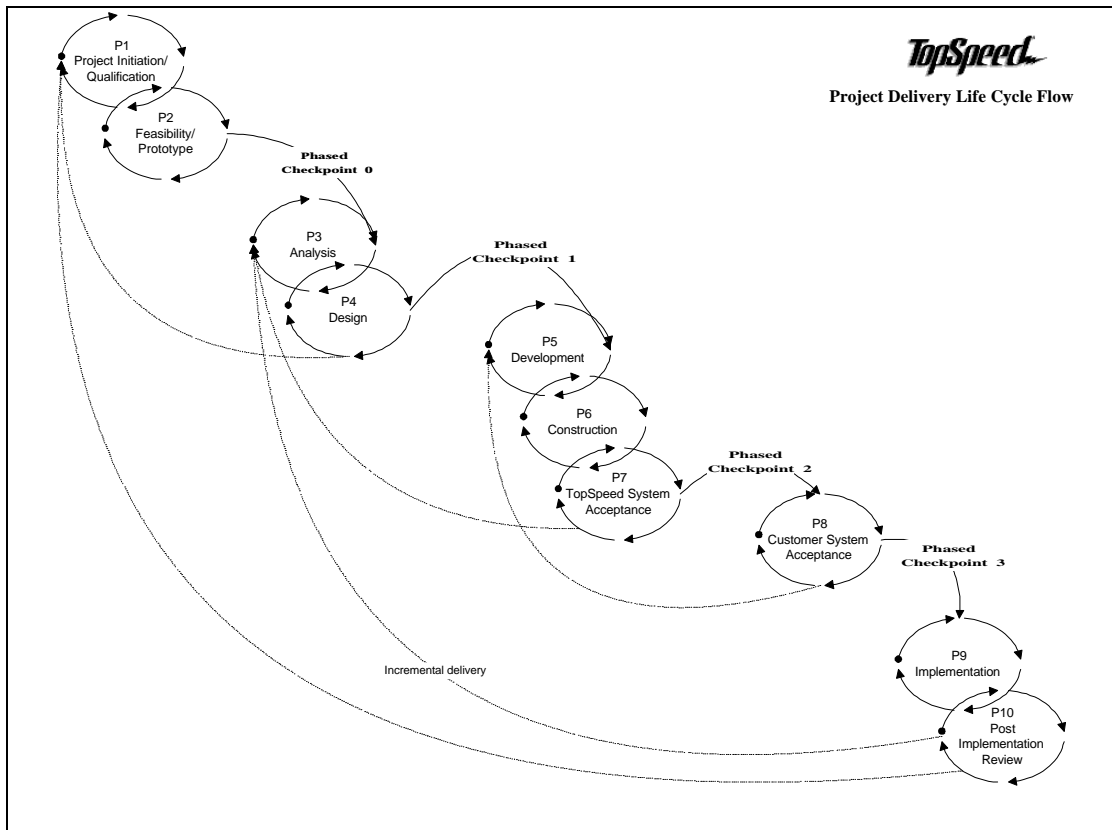
Phased Checkpoint 0	P1 Opportunity/Qualification P2 Feasibility/Prototype Phase
Phased Checkpoint 1	P3 Analysis P4 Design Phase
Phased Checkpoint 2	P5 Development P6 Construction P7 TopSpeed's Internal Systems Acceptance
Phased Checkpoint 3	P8 Client's System Acceptance
Phased Checkpoint 4	P9 Implementation (Deployment of full production system) P10 Post Implementation Review
Phased Checkpoint 5	P11 Maintenance
Notes	The Client generally holds P9 Implementation and P10 Post Implementation Reviews. P10 also provides a feedback loop from the client to TopSpeed's Product Development.

**Table 1: TopSpeed Phased Checkpoints**

While TopSpeed has identified Phased Checkpoints 1 through 5 as integral to the successful completion of a project, Phased Checkpoints or phases may be altered or eliminated to meet specific Client needs.

# Project Delivery Life Cycle

The Project Delivery Life Cycle, identified in Figure 1, demonstrates the iterative/waterfall phases of the Phased Checkpoint system, as a typical project passes through the various Phased Checkpoints. The circular pattern indicates the iterative process that may result in some overlap between phases that are within the same phased checkpoint parameter. For instance, the P3-Analysis and P4-Design phases are overlapping between Phased Checkpoint 0 and 1. There should not be any overlap between phases that are not between the same checkpoints. For instance, the P-2 Feasibility/Prototype and the P-3 Analysis are not overlapping.



**Figure 1: Project Delivery Life Cycle**

All activities considered critical to the immediate and long-term success of any project have been implemented within TopSpeed’s methodology. All tasks encompassed within the Project Life Cycle are continuously evaluated in order to determine the applicability and, therefore, the value to any given project.

The key factors affecting the determination of value are:

- Is the proposed alternative low risk to the client’s schedule and budget?
- Is the proposed alternative of demonstrable value to the client?
- Is the proposed alternative straightforward, clear, and concise in its design, documentation, and implementation process?

## Process Delivery Cycle Summary

Table 2 entitled “TopSpeed Major Delivery Phases” depicts the major phases that must be successfully passed through in the delivery of a TopSpeed Partner system in order for a project to reach completion:

Phase	Purpose	Deliverables
P1 Project Initiation	To present an initial valuation of the potential of a proposed application to management. Focus on issues, objectives, & benefits (not solution).	<ul style="list-style-type: none"> <li>• Project Proposal</li> <li>• Initial Project Plan</li> <li>• Approval for Feasibility Phase</li> </ul>
P2 Feasibility	To define the project objectives and scope; identify key partners; develop potential alternative solutions; define cost/benefit analysis; recommend preferred solution.	<ul style="list-style-type: none"> <li>• Feasibility Study Report</li> <li>• Prototype</li> <li>• Revised Project Plan/costs</li> <li>• Approval for Systems Delivery</li> <li>• Appropriate Customer Invoicing</li> </ul>
P3 Analysis	To fully define the problem in terms of the proposed business solution. Map solution against existing Product.	<ul style="list-style-type: none"> <li>• Product Requirements Report</li> <li>• Revised Project Plan/Costs</li> </ul>
P4 Design	To define the functional and technical systems design for all software applications, networks, databases, and user interfaces.	<ul style="list-style-type: none"> <li>• Technical Design Report</li> <li>• Revised Project Plan/Costs</li> </ul>
P5 Development	To ensure the business infrastructure is in place to support the implementation of the new application.	<ul style="list-style-type: none"> <li>• User Acceptance Test Documentation</li> <li>• Operations Documentation</li> <li>• User Training Plan/Manual</li> <li>• User Systems Documentation</li> <li>• Revised Business Procedures Documentation</li> <li>• Technology Deployment Strategy</li> </ul>
P6 Technical Construction	To produce a tested system according to the Technical Systems Design Report	<ul style="list-style-type: none"> <li>• Revised Technical Design Report</li> <li>• Revised Operations Documentation</li> <li>• Test plans/Test cases</li> <li>• Working System (programs, databases)</li> </ul>
P7 TopSpeed Internal Systems Acceptance	To system test to the satisfaction of TopSpeed’s QA standards of operations and application support.	<ul style="list-style-type: none"> <li>• Revised Technical Design Report</li> <li>• Test Results Evaluation Report</li> <li>• Approved TopSpeed Systems Test</li> <li>• Revised Project Plan/costs</li> </ul>
P8 Customer System Acceptance	To test the system and supporting documentation to the satisfaction of the users, systems operations and application support.	<ul style="list-style-type: none"> <li>• Working System</li> <li>• Finalized Documentation (User Guide, Operations, Administration)</li> <li>• Test Results Evaluation Report</li> <li>• Approved customer sign-off (users, sponsors)</li> <li>• Revised Project Plan/Costs</li> </ul>
P9 Implementation	To install the accepted system into the production operating environment and be deployed by customer end-users.	<ul style="list-style-type: none"> <li>• Working Production System</li> <li>• Successful Implementation Sign-off</li> <li>• Final Customer Invoice/payment</li> </ul>
P10 Post Implementation Review	To evaluate how well the system meets operational & user requirements. To evaluate potential future projects.	<ul style="list-style-type: none"> <li>• Post Implementation Review Report</li> <li>• Revised cost/benefit report</li> </ul>

**Table 2: TopSpeed Major Delivery Phases**

# Data Repository

The soundness of TopSpeed's delivery methodology is predicated upon our use of data repositories. The use of data repositories has been instituted in order to guarantee a clear, concise, and accessible project tracking method by establishing a documentation map that traverses the entire project. Key deliverable documentation components are augmented and built upon during each phase of the project delivery. While repositories may be built to meet specific Client project needs, the customary data repositories include:

## Project Repository

The Project Repository consists of: Request For Proposals (RFP), Client Defined Requirements (CDR), Preliminary Budgetary Requirements, Professional Services Agreement, Project Charter, Project Reviews, Phased Checkpoint Acceptance Documentation, Post Implementation and Consulting Services Review, and any additional agreements entered into between TopSpeed and Partners.

### Request for Proposal

The Request for Proposal (RFP) is usually the first document submitted to TopSpeed by the Client. The RFP should contain bidder's information such as a client-constructed scope of work, bid deadlines, budgetary considerations, project timelines, and any other pertinent information for successful vendor bidding.

### Client Defined Requirements Document

The Client Defined Requirements (CDR) Document may be submitted to TopSpeed by the Client as either part of the RFP or in lieu of an RFP. The CDR should contain a clear specification of project scope. This document will be used in preparation of the Preliminary Budgetary Requirements Document.

### Preliminary Budgetary Requirements Document

This document includes a preliminary budget for the proposed system as well as a proposal for TopSpeed to perform the business requirements and technical needs analysis.

## **Professional Services Agreement**

The Professional Services Agreement is the contractual bond that establishes the relationship between TopSpeed and its Client. The agreement covers the scope and terms of service, payment schedules, non-disclosure, warranties, terminations, and all general understandings between TopSpeed and its Client.

### **Change Order Agreements**

Change Order Agreements recognize any change in technical scope to the original Professional Services Agreement. Change Order Agreements are identified in ascending alpha-numeric order and contain the new scope description, revised payment terms, and a clause that establishes the original Professional Services Agreement as the prevailing agreement for all other terms of the relationship between TopSpeed and its Client.

### **Maintenance Service Agreement**

The Maintenance Service Agreement defines the parameters and fees of post-implementation service.

## **Project Charter**

This document includes the completed project scope, responsibility matrix, project stakeholders, key personnel contact information, change order procedures, initial project plan (GANTT Chart), and authorization to proceed documents. It may also include an appendices of the budgetary documentation.

## **Project Reviews**

This information includes weekly status reports, change orders, project status reports showing actual and variance on schedule and budget, and other project documentation as deemed appropriate by the client and/or developer.

## **Acceptance Documentation**

Acceptance Documentation consists of all acknowledgements executed by the Client through the progressive stages of development (i.e. Phased Checkpoints). Final Acceptance Documentation is executed upon system turnover to Client.

## **Post Implementation and Consulting Services Reviews**

The Post Implementation and Consulting Services Reviews are documents that are completed by TopSpeed project Team members and Client in an effort to gauge satisfaction.

## **Business Requirements Repository**

The Business Requirements Repository contains the findings discovered in the Business Requirements discovery phase, suggested business models, a definition of the accepted alternative or combination thereof, and any modifications to the selected alternative that are added in progress.

### **Business Requirements Document**

Once the proposal created under the Preliminary Budgetary Requirements Document has been approved, TopSpeed will begin to examine the existing business, compare it to innovative companies in a similar industry, determine the most effective strategy for the Client's business, and create a document that outlines the existing structure, explains advantages and disadvantages, and proposes at least one alternative approach. This information could include documentation from intended users of the system, workflow models, hard copy documents, and documentation on current systems, if any. The output will be a document that outlines the business requirements of the proposed system.

## **Technical Requirements Repository (SOW)**

The Technical Requirements Repository will include documents such as the Technical Design Mapping Document, the System Requirements Document, the Software Requirements Document, the Technical Specifications Document and the Documentation Requirement Document.

### **Technical Design Mapping Document**

The Technical Design Document is drafted after the Business Requirements are defined and accepted. This document maps the system that has been proposed for design and implementation and outlines the strategy toward fulfillment. Any changes in technical design or fulfillment strategy should be added as an addendum to this document.

### **System Requirements Document**

The Technical Requirements Repository also contains the Systems Requirements Document. The System Requirements Document contains the hardware and network specifications that must be instituted to maximize functionality of the new system.

### **Software Requirements Document**

The Software Requirements Document outlines the version of software being utilized, any ancillary programs required for full functionality and the entity responsible for providing such software for implementation. If TopSpeed is responsible for obtaining the software, the cost and license numbers of such software should also be included in the documentation.

### **Technical Specifications Document**

The Technical Specifications Document outlines the total specifications of the system including the mapping, system requirements, software requirements, workflow analysis, system design and system interfaces. This is an evolving document that should reflect the final system once complete.

### **Documentation Requirement Document**

The Documentation Requirement Document outlines the required documentation for the system. This can include Help documentation, User Guides, Training Guides or Interactive CDs, ISO-9000 requirements, code documentation, system documentation, etc.

## **Test Schedule and Results Repository**

The Test Schedule and Results Repository is a collection of the test schedule with specific target dates, parties involved, and results of primary and re-tests. This Repository contains the design defect/enhancement tracking schedule. All requisite remediation is documented within this repository.

### **Testing Strategy Document**

The Testing Strategy Document defines both TopSpeed's internal testing schedule and the Client's testing schedule by establishing testing dates, end-result reporting strategies, and remediation times.

### **Testing Schedule**

The Testing Schedule outlines targeted testing dates. This schedule is incorporated into the project plan.

### **Test Results Warehouse Document**

The Test Results Warehouse Document will progressively track results and remedies of the testing cycle in a highly detailed fashion. This document will be a product of an online project tracking system.

## **Implementation and Training Schedule Repository**

The Implementation and Training Schedule Repository consists of the defined implementation strategy and its schedule, as well as the training curriculum, its scheduled admission, and a listing of the parties to whom training will be respectively directed. This repository also contains the training documentation.

### **Implementation Strategy**

The Implementation Strategy Document identifies and defines the selected implementation method and lists the targeted implementation dates.

### **Implementation Schedule**

The Implementation Schedule identifies the targeted dates for system implementation.

### **Training Strategy**

The Training Strategy Document identifies the training needs of the Client and defines a structured training plan around those needs. The Training Strategy Document also includes the training curriculum.

### **Training Schedule**

The Training Schedule details the targeted training sessions and identifies all participants.

## Maintenance Repository

### Maintenance Strategy Document

The Maintenance Strategy Document describes the type of maintenance plan selected by the Client. The document also identifies the TopSpeed Maintenance team assigned to the Client.

### Maintenance Log

The Maintenance Log chronicles issues and remediation strategies that occur during the post-implementation service period.

### System Documentation

System Documentation consists of the final technical system documentation. The System Documentation is delivered to the Client at the conclusion of the project as part of the knowledge transfer to the Client's staff. A copy of the same is retained at TopSpeed for the system Maintenance team to reference.

## Data Repository Summary

The development and maintenance of the data repositories are key to TopSpeed's ability to track projects, but more importantly they are a key contributor to our ability to gain insight into our existing processes and foresight into the future evolution of our delivery process. The knowledge gained through this data collection process will enable TopSpeed to adapt our approach to meet customer requirements.

## Roles and Responsibilities

### Account Manager

- Locate and qualify potential Clients
- Provide overall customer management services
- Participate in scheduling and conducting Client presentations
- Work with Project Manager to deliver quotes and proposals
- Act as administrator of all business, financial and relationship issues
- Take an active role in issues requiring Management Escalation
- Mine existing Clients for additional opportunities within their organization

## **Project Manager**

- Assist Account Manager to communicate with Client through the processes of securing the Client
- Analyze customer requirements
- Participate in the provision of Budgetary Projections and Informal Project Outline
- Schedule and consult with Business Analyst when applicable
- Schedule and consult with Technical Project Lead/Estimator to define project specification
- Work with Client to define functional requirements
- Establish functional point specifications for actual development of custom solution
- Prepare proposals
- Participate in Contract Negotiation
- Co-ordinate and define development and deliverable schedules
- Ensure Client awareness of schedules and expectations
- Cultivate & maintain database of Clarion developers
- Match Client skill set with developer & then schedule developer
- Knowledgeable of products and solutions provided either by TopSpeed or Third Party
- Act as liaison between Client and TopSpeed Technical Project Manager
- Manage developers in the coding and development of the application and user interfaces
- Incorporate unscheduled changes or enhancement requests into project plan
- Negotiate change orders and keep Technical Project Manager informed
- Work with hardware and network vendors to ensure co-ordination
- Keep abreast of all new release features and functions within the TopSpeed product line
- Oversee QA plan and testing both internally and at Client site
- Ensure that all design defect issues are resolved
- Escalate product defects or lack of features to TopSpeed's Product Management and/or TopSpeed Development Centre
- Define and oversee product implementation process
- Co-ordinate and implement client training
- Insure documentation requirements and deliverables are reached
- Oversee Technology transfer
- Insure proper post-implementation support requirements are in place for both TopSpeed and Client
- Ensure proper technology transfer to support staff to enable post implementation support
- Ensure final delivery of custom system
- Keep Account Manager current on project status through all phases
- Foster the development of new leads within Client organization and forward them to the Account Manager

## **Technical Project Manager**

- Work with Business Analyst, Project Analyst, and Project Manager to outline detailed functional specifications for project
- Work with Project Manager to create functional point specifications for development of custom solution
- Assist Project Manager with design defect issues
- Maintain the Testing Data Repository
- In conjunction with Project Manager, ensure that documentation requirements are met
- Estimate changes and/or enhancement requests
- Assist Project Manager with the co-ordination of hardware and network vendors
- Keep abreast of all new release features and functions within the TopSpeed product line
- Facilitate escalation of interfering product defects or lack of features to TopSpeed's Product Management and/or TopSpeed Development Centre
- Ensure proper technology transfer to support staff to enable post implementation support

## **Business Analyst**

- Work with Account Manager to analyze Client needs
- Define detailed functional requirement alternatives with Account Manager, Project Manager, and Client
- Produce detailed specification report – Business Requirements Document
- Work with Project Analyst to create proposed System Map – Technical Requirements Document

## **Project Analyst**

- Work with Account Manager and Project Manager to compile Preliminary Budget Documentation
- Work with Account Manager, Project Manager, and Business Analyst to prepare Technical Requirements Documents
- Work with Project Manager to create Project Proposals

## **Project Engineers**

- Assume assigned role among a project team – development, documentation, quality assurance, implementation
- Report to Project Managers

## **Trainer**

- Work with Project Managers to define scope of Client training
- Work with Project Manager to schedule training
- Collect documentation from Project Management