**Project Management Process Groups**

1. **Initiating: The goal for this phase is to define the project.**

[ ]  Define Project Aims (overall goals of the project)

[ ]  Define Project Objectives (are the details of each goal desirable, feasible, achievable, quantifiable?)

[ ]  Outcomes (describes what will be made possible if objectives are achieved?)

[ ]  Select Project Type (Mobile – Android/iOS, Skill – Alexa, Google Action, Website, Other)

[ ]  Create Project Initiation Document (see template PID)

[ ]  Gather Generic Requirements from Client

[ ]  Analyze Requirements and share it with client to receive feedback (repeat until obtaining validation from client that requirements satisfy aims and objectives)

[ ]  Draft Proposal

[ ]  Define Project versioning (v1, v2, … vn) *[if project size/complexity requires]*

[ ]  Proposal Acceptance (email, signed documents)

[ ]  Define Communication *(see Communications Management Template)*

[ ]  Create Project on Basecamp/Trello

[ ]  Create Detailed Requirements Document (*refine until Client provides approval that requirements satisfy aims, goals and objectives)*

[ ]  Obtain Written Confirmation for Requirements from Client *(signed document)*

1. **Planning: This phase includes developing a roadmap for everyone to follow.**

[ ]  Define Project Team (Client Rep, Project Sponsor, Internal (QA, PM, Developers)

[ ]  Define Project Variables:

* 1. Define Project Physical and Logical Architecture (Design (OO, Non OO), Technology, Components (back, middle, front), Database, Integration)
	2. Create Project Environments (Local, Development, Production)

[ ]  Create Work Breakdown Structure (WBS)

* 1. Written Acceptance of WBS (Internal)
	2. Estimate Level of Effort for WBS

[ ]  Set Milestones

[ ]  Create Gantt Chart

[ ]  Create Assumptions, Risks and Constraints Document

[ ]  Set Weekly Progress Meetings (to include Client Rep)

[ ]  Create Change Control *(see templates)*

[ ]  Create Risk Register *(see templates)*

[ ]  Create Testing Plan Agreement

[ ]  Project Planning Acceptance

[ ]  Project Kickoff Meeting

1. **Executing & Monitoring: At this stage, the project team is built and deliverables are created. Project managers will monitor and measure project performance to ensure it stays on track.**

[ ]  Project Development Starts

[ ]  Monitor & Control work and resources

[ ]  Maintain regular communication with stakeholders (*see Communications Management Plan template*)

[ ]  Register Change Requests\*

[ ]  Evaluate & Approve Change Requests (*Once a project has started, we will try to not accept changes, we will need to explain the customer why we can’t and the implications of the changes (in Delivery date and cost). Recommend for next version. If the customer insists, we will need to have a written acceptance of new conditions (Basecamp, email, agreement, etc...)*

[ ]  Start Test Phase\*\*

* 1. Release Alpha Testing (internal)
	2. Release Beta Testing (external)
	3. UAT and Version Release

[ ]  Code Release:

* 1. Mobile Apps **MUST NOT** be published to the App Store until payments have been reviewed and approved by the Project Sponsor.
	2. Developed code (dev and prod) **MUST NOT** be shared on client server environment until payments have been reviewed and approved by the Project Sponsor.
	3. Final versions of code **MUST NOT** be shared with clients until payments have been reviewed and approved by the Project Sponsor.
1. **Closing: The project is completed, a post mortem is held, and the project is transferred to another team who will maintain it.**

[ ]  Lessons Learned

[ ]  Evaluate outcome of Project against Project Initiation Document

[ ]  Share lessons learned with Team

[ ]  Project Review

[ ]  Release Project Resources

[ ]  Project Handoff to Maintenance Team

[ ]  Project Closure

\* Change Requests: Changes can be requested either from the client or the PM Team but will be subject to review and approval by the Project Sponsor. Changes must not alter the scope, budget or project time beyond the buffer zone. If approved, changes should be included in the next feasible version provided their impact will not cause imbalance between the 3(Scope, budget, time).

\*\* Testing Plan: Clients should receive and sign a Testing Document Agreement and update it after each testing phase, validating the iteration.