

Project Management Process

Effective Controls for Success | Major Phase Overview

Proposal Preparation and Delivery

This critical first step provides time to explore and understand the business problems and desired project outcomes. Project requirements are documented and a high-level solution is presented to the client. The client learns about the consultant and the consultant about the client. The preliminary scope of the project, its primary deliverables, and the time and resources required are determined and agreed to by client management.

Project Planning and Management

This phase builds on the knowledge gained in the proposal phase, and includes a thorough review of the existing systems, current business processes, and detailed project requirements. This allows the project team to gain additional understanding of the complexities of the project and the impact on various parts of the business. As part of the early work, the consulting team will educate the key client team personnel on the basics of project management and the expected solution set. This phase ends with the presentation of the updated scope document, deliverables, and milestone schedule to the client for their review and approval.

Installation and Preliminary System Design

Once the project roadmap has been established with detailed scope, deliverables, and milestones, the project team turns its efforts toward the new systems and processes. New workflows and controls are developed, new reports are designed and approved, new forms and data integration points are developed and detailed, core software is loaded and configured, a "sandbox" or conference room pilot (CRP) testing environment is created, and the initial data conversion is performed.

Conference Room Pilot & Testing

The conference room pilot phase incorporates rigorous testing of the system to ensure accuracy, consistency, and efficiency. The test system (i.e. "sandbox") is a working copy of the entire solution consisting of the required modules along with sample client data and transactions. The conference room pilot enables the project team to perform testing on the configuration and implementation work by simulating a "day-in-the-life" of the client. The testing enables the project team to glean insight into any additional configuration issues left to be completed. This often substantial period of work and elapsed time is monitored regularly in project status meetings and reports.

Modification and Custom Programming

This phase of the project may be limited and short, or long and complex, depending on the requirements identified and developed in previous phases. Depending on client requirements, it may be completed before or after the conference room pilot phase. Either way, any requirements are now well understood and ready for development and testing. Separate project management and control plans are developed for each significant modification and are tracked accordingly to ensure on-time delivery.

Implementation, Final Data Conversion and Training

This critical phase involves ensuring that people, systems, equipment, customers, suppliers, etc. are ready for the change over to the new system and workflows. User training and detailed system tests are conducted. Data conversion programs and processes are tested, security schemas are validated, user controls are established, and backup and recovery plans are detailed. Final timing for conversion to the new system is obtained from management.

GO Live

This work may occur over a short period of hours or days, or may be "rolled out" over a period of weeks. The project team will work closely with the client to answer questions, resolve any glitches, and reassure those who may be struggling with the change. Documentation, training, and the open issue list are updated and frequent status reports are provided to management.

Post Implementation Review

This phase is critical to determine the extent to which project objectives were met, and should be conducted after the client has used the new system for some predetermined time period. Shortfalls in training, organizational design, and controls are identified and corrected. Targeted project savings and efficiencies are quantified and reported. User morale and customer/supplier impacts are sampled and reported. A management meeting is held to review findings and discuss recommendations. Future projects are identified and discussed.



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The Information Technology Alliance (ITA) is a membership association of highly regarded mid-market technology professionals, consultants, and product/service providers. Its primary objective is to create and sustain a community where members share information and build relationships that improve the way they, and their clients, do business.

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Effective Controls for Success

featuring:

IT Project Life Cycle

major phases | major tasks



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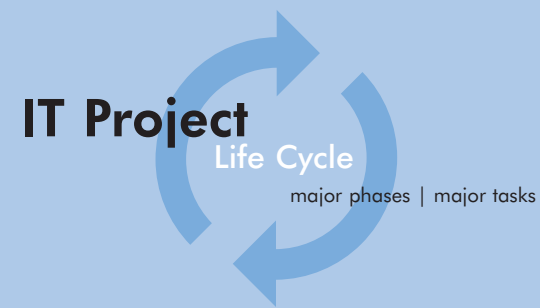
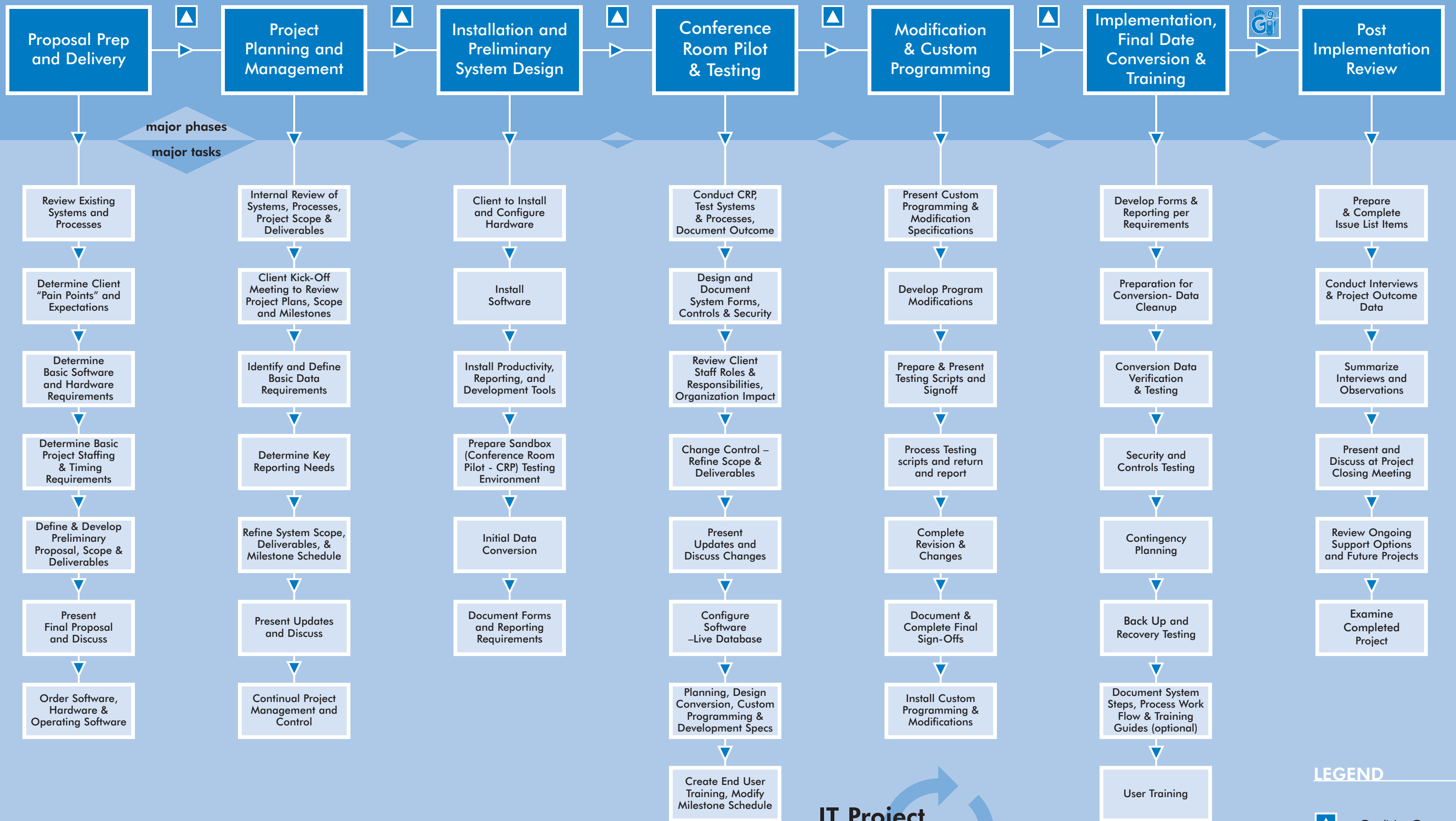
Simi Valley, CA

Orange County, CA

Chicago, IL

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LEGEND

- Go/No Go
- GO LIVE