ANDOSI STANDARD DEPLOYMENT PROCESS

Phase 1 – Project Definition	✔
1. **Step 1 – What are the specific goals to be achieved?** Specify exactly what needs to be accomplished by each department or team. Document, on a high-level, the reasons for the project and the benefits expected. This does not need to be a detailed requirements list, but the goal is to be able to easily communicate to all stakeholders what is desired and why.	
2. **Step 2 – Prioritize the functionality required** Every project will have some areas that are more important than others. And, by the nature of the project, some tasks must come before others (for example, the data in a system must be current and valid before it can be reliably reported on). Prioritizing the goals will help define the timeline and budget.	
3. **Step 3 – High level budget and timeline** Most projects start with an expected level of investment and ideal time to have new processes/systems online. The timeline can be dictated by the calendar, business changes, or even regulatory changes. It is likely the budget and timeline will change during the planning/discovery phases but starting with high-level expectations helps all stakeholders begin to envision the overall scope and impact at the earliest stages of the project.	
4. **Step 4 – Proof of Concept (POC), if needed** This optional step is typically used to verify that the system selected will in fact handle certain key functions needed in a manner expected by the customer. The POC focuses on those areas that are critical to the customer and usually involves a very limited focus area. That area can be configured and even customized, so provide assurance that the system can handle what is necessary.	

PHASE 1 – PROJECT DEFINITION

PHASE 2 – PROJECT PLANNING	✔
1. **Step One – Identify key stakeholders & roles** **Client:** - Executive Sponsor - Project Manager(s) - Departmental Decision Makers - Subject Matter Experts - Other Stakeholders - HR Training team (if applicable) **Andosi:** - Executive Sponsor - Project Manager - Consulting Team (Functional/Technical) - Training and Documentation Experts	

PHASE 2 – PROJECT PLANNING

PHASE 2 – PROJECT PLANNING	2.	**Step Two – Define project goals** **Who** Client: Project Manager, Decision Makers, SME's Andosi: Lead Consultant/Project Manager **What** Define specific goals and how which functional departments are affected. **When** Define expected timeline based on the goals desired **Budget** Develop a high-level budget that encompasses the functionality desired and resources required to meet the expected timeline.	
	3.	**Step Three – Define detailed requirements** Teams meet to define specific design of the system. Key Items to address are data flows, data conversions work flows, user and customer experience and technology preferences. If applicable, a generic test system is set up for use by the requirements team. The project deliverable at this stage is the detailed requirements document. If appropriate, a gap analysis document is also prepared.	
	4.	**Step Four – Verify expectations** Review the requirements in relation to the estimated budget and adjust the requirements or resources so all is in alignment. Document all decisions made.	
	5.	**Step Five - Create design document** Once the budget expectations are set, the design process begins. This process will entail meetings and clarification with the SME's and possibly technical research and discussion to determine the most appropriate approach to implementing the system.	
	6.	**Step Six - Design document signoff** Once the design document is completed, all parties need to review and accept it. Any budget impacts will be discussed and agreed to before proceeding.	

PHASE 3 – SYSTEM DEVELOPMENT	**Phase 3 – System Development**		✓
	1.	**Step 1 – System configuration/customization** This is where the actual system configuration and/or customizations take place based on the approved design. The development team is to test internally to verify that the system is functioning as designed.	
	2.	**Step 2 – Initial data conversion (for training and testing)** Converting data at this stage is key to a positive user experience for the following reasons: 1. By using 'real' data, the system testing methods will be natural as the data will be familiar to the users. Thus, they will be better equipped to flush out any problems during the testing phases. 2. Any timing or another data conversion issues can be noted and addressed in this phase. The knowledge gained in the test conversion allows for precise planning of the cutover to the new functionality being implemented. Note: Depending on the complexity of the project or data conversion, several data conversion iterations may be required.	
	3.	**Step 3 – Unit testing** SME's and/or decision makers test their appropriate system components on the Development/Test system. If remediation is required, the requirements and design documents are updated to reflect any changes needed. Unit testing is repeated until all parties are satisfied.	

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<tr><td rowspan="2">P H A S E 3 —
SYSTEM DEVELOPMENT</td><td>4.</td><td>### Step 4 – End-to-end testing
Once unit testing is completed, the entire system is tested end-to-end using actual representative data. All inputs, processes and outputs are tested as can reasonably be expected when the new functionality is implemented.   Once both parties agree everything is as expected, The Phase 2 milestone is achieved. Any changes to the requirements and system design are finalized during this step.

Note: For small, incremental functionality projects, end-to-end testing may not be necessary. In such situations, only unit testing is required.</td><td></td></tr>
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PHASE 4 – SYSTEM DEPLOYMENT ✓

Phase 4 – System Deployment			
	1.	### Step 1 – Create user documentation User documentation usually consists of two components: User training materials and the final user documentation. Depending on the complexity of the project, these are often combined into one document.	
	2.	### Step 2 – Create and execute the user training plan The most effective method is for the consultant(s) to train the company trainer. This "train-the-trainer" approach allows for consistent in-house training and knowledge for assisting users in their day-to-day usage of the system as well as future users. Preferably, the 'trainer' is the HR department, if so equipped.	
	3.	### Step 3 – Final data conversion and cut-over Once the users are ready to go, the final data conversion will take place. Once the data is validated, the new system/component will be brought online.	

PHASE 5 – WRAP UP AND MEASUREMENT ✓

Overall project success level:

Phase 5 – Wrap up & Measurement			
	1.	### Determine overall project success Measuring the results will provide management with several benefits, including: - Determining if the initial expectations were reasonable in relation to the project delivered. - The ability to evaluating the performance of project management for the project. - Determining if expected ROI after project completion is in line with initial expected ROI	
	2.	### Document project learning and results (post mortem) - Reiterate how the project will impact the business as planned. - Note any additional impacts that were not anticipated during initial planning	