PROJECT MANAGEMENT METHODOLOGY

DATE: 10/05/2021

VERSION: 2.0

Bright Cloud Group

Table of Contents

1. Document Control Information

1.1 Version Control

Version	Date	Description
0.1	05/11/2019	First Draft
0.2	19/12/2019	Phase gate checklists and runbook added following internal review
2.0	10/05/2021	Latest document format applied. Embedded documents added as Appendices. References added to new roles of Finance Manager and Head of Support. The use of Webex Teams and Timeular have been added

1.2 Document Contributors

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2. Introduction

This document describes BrightCloud's approach to Project Management, that sits within the Company's overall Lifecycle Management model for customer engagement. The BrightCloud Lifecycle Management process defines a complete and structured methodology around the customer's requirements. It has been designed to cover all elements of the life cycle from the initial customer contact through to the operational elements of a support contract or managed service.

Project Management is the application of processes, methods, skills, knowledge and experience to achieve specific project objectives according to the project acceptance criteria within agreed parameters. Project Management has final deliverables that are constrained to a finite timescale and budget. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget. Time, cost and quality are the building blocks of every project.

3. Scope

This Project Management Methodology applies to that portion of the BrightCloud Lifecycle Management process from acceptance of a customer's Purchase Order to achieving the stated acceptance criteria and handing over to Support. BrightCloud's Project Management Methodology divides the project into six key phases. These phases are:

1) Initiation
2) Planning
3) Design
4) Execution
5) Implementation
6) Closure

This methodology and supporting standards apply to all BrightCloud employees, full-time and part-time, permanent and contract.
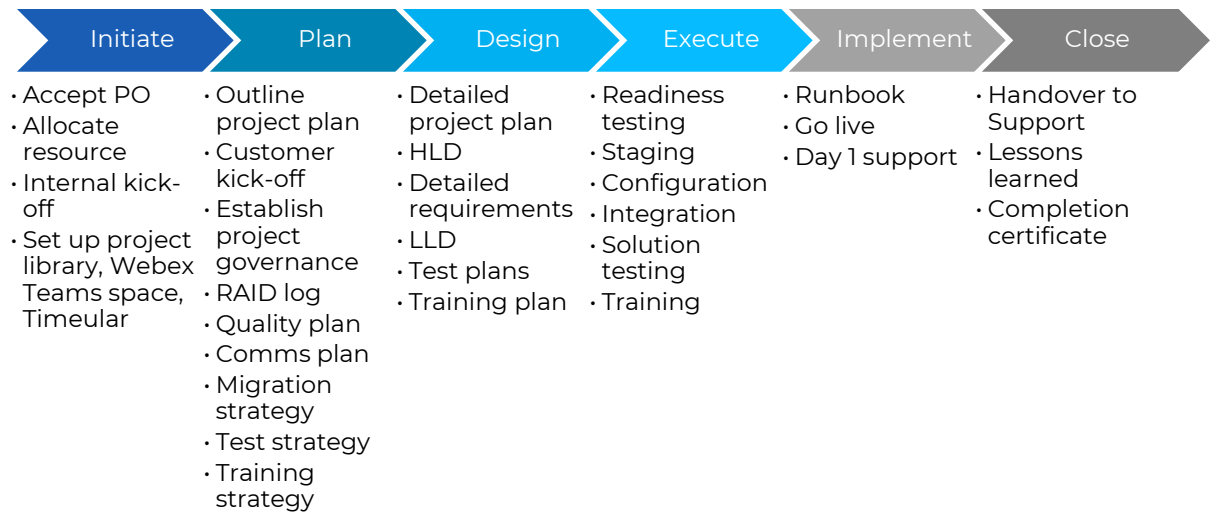
4. Project Management Methodology - Overview

Successful projects don't just happen. They must be carefully planned and controlled to meet the project objectives – on time, within budget, and to scope. Sound processes, templates, and solid project management foundations help mitigate project risks and ensure smooth delivery. To achieve this, BrightCloud has designed and developed its own Project Management methodology around PRINCE2 principles, best practices in project management, and our own experience from many projects delivered across different verticals.

BrightCloud recognises that the various customers and channels that we work with may have their own project management procedures and practices. Whilst the BrightCloud methodology is the standard that we normally apply to delivery of customer projects, we have the flexibility to adopt and apply procedures and templates that are mandated by our customers and partners when necessary. Our project management team has many years of combined experience in a broad range of project methodologies including but not limited to PRINCE2, PMI, APM and Agile.

5. Project Phases

BrightCloud's Project Management Methodology divides a project into six phases:

Initiate	Plan	Design	Execute	Implement	Close
• Accept PO • Allocate resource • Internal kick-off • Set up project library, Webex Teams space, Timeular	• Outline project plan • Customer kick-off • Establish project governance • RAID log • Quality plan • Comms plan • Migration strategy • Test strategy • Training strategy	• Detailed project plan • HLD • Detailed requirements • LLD • Test plans • Training plan	• Readiness testing • Staging • Configuration • Integration • Solution testing • Training	• Runbook • Go live • Day 1 support	• Handover to Support • Lessons learned • Completion certificate

The phases are underpinned by strong project governance comprising monitoring and control; communication planning and escalation management; resource management; risk and issue management; documentation management; cost control and invoicing; and change control.

Each project phase has a set of tasks and deliverables that are described in the following sub-sections.

5.1   Project Initiation

Project initiation starts from acceptance of a purchase order (PO) and a signed Sales Order Form from the customer or partner. The PO is accepted by the Sales team after confirming that the value of the PO matches the value of the quote; and that the Terms and Conditions are acceptable.

The Sales Team sets the status of the deal in Zoho CRM to "Closed-Won". An email alert is sent to the Head of Professional Services. The supporting documentation is available in Zoho CRM and comprises:

- Customer PO
- Signed Sales Order Form
- BrightCloud proposal, Scope of Works (SOW) or Change Request (CR)
- Pre-Sales Pricing Sheet, including resource estimate

The Head of Professional Services allocates a Project Manager and a Technical Lead.

The Project Manager arranges an internal kick-off meeting which shall be attended by:

- Project Manager
- Technical Lead
- Pre-Sales Consultant
- Account Manager

For strategic projects, attendance may also include Head of Professional Services, Head of Sales, Head of Pre-Sales, Chief Technical Officer (CTO) and Chief Executive Officer (CEO).

The Project Manager chairs the internal kick-off meeting using the Project Initiation checklist (

Appendix 1)

The internal kick-off meeting will include a walk-through of the SOW and the Pricing Estimate by the Pre-Sales Consultant, supported by the Account Manager. Following the internal kick-off meeting, the Head of Professional Services may accept the project and will then allocate engineering resource.

The Project Manager will:

1) Create the project library in SharePoint (see 6.5 Documentation Management)
2) Create a Webex Teams space for members of the project team
3) Set up a team space in Timeular, BrightCloud's online time tracking tool

5.2   Project Planning

In the planning phase, the Project Manager prepares an outline Project Plan.

The Project Manager arranges a customer kick-off meeting that shall be attended by:

- Project Manager
- Technical Lead
- Pre-Sales Consultant
- Account Manager
- Customer/Partner Project Manager(s)
- Customer/Partner Technical Lead(s)
- Partner Account Manager

There is a PowerPoint template for the customer kick-off meeting in the PMO Templates folder in SharePoint. A typical agenda for the customer kick-off meeting is as follows:

1) Introductions

2) Project Scope

3) Project Deliverables

4) Project Timeline

5) Project Governance

6) Roles and Responsibilities

7) Acceptance Criteria

8) Next Steps

9) AOB

Under Roles and Responsibilities, the Project Manager will highlight BrightCloud's expectations from the customer, and will ask for the names of those responsible for providing dependencies, accepting deliverables etc. Minutes of the kick-off meeting will be recorded in the template at Appendix 2.

The Project Manager establishes project governance in agreement with the customer project manager e.g. frequency of progress reports and meetings; terms of reference for the project board, composition of the project board and frequency of meetings; escalation procedures; change management.

The Project Manager creates and subsequently maintains the project RAID log. As part of this, the Project Manager may arrange a risk workshop, particularly for larger and more complex projects. The RAID log and the Project Status Report are combined in a single document referred to as the Project Workbook.

The Project Manager arranges for some or all of the following documents to be created as appropriate for each individual project:

- Quality Plan
- Communications Plan
- Migration Strategy
- Test Strategy
- Training Strategy

At the end of the Planning Phase, the BrightCloud Project Manager prepares and approves a Project Planning Quality Gate Checklist (Appendix 3) that is also approved by the Head of Professional Services.

5.3   Design Phase

During the design phase, the Project Manager creates a detailed project plan. The Technical Lead is responsible for producing a High-Level Design document (HLD). Subsequently the Technical Lead initiates detailed requirements gathering, leading to the creation of a Low-Level Design document (LLD). From the LLD, a number of test plans will be created as required for each project. These may include:

- Network ready for use tests plan (NRFU)
- Unit test plan
- Integration test plan
- System Acceptance Test plan (SAT)
- Operational Readiness Test plan (ORT)
- User Acceptance Test plan (UAT)

During the design phase a Training plan may also be produced.

At the end of the Design Phase, the BrightCloud Project Technical Lead prepares and approves a Project Design Quality Gate Checklist (Appendix 4) that is also approved by the Project Manager.

5.4 Project Execution

This phase covers the implementation of the solution up to the point just before go-live. The key tasks in sequential order are:

- Network readiness testing – ensuring that the customer's network is ready to start implementing the solution
- Staging – installing the hardware and software that comprise the solution
- Configuration of the hardware and software to meet the technical, business and operational requirements
- Unit testing
- Integration of the solution components with each other and with any other systems that comprise the solution
- Integration testing
- Systems Acceptance Testing
- Training of end users, managers and system administrators
- User Acceptance Testing
- Operational Readiness Testing

These tasks are generally carried out by technical consultants but are co-ordinated by the Project Manager in accordance with the project plan to ensure timely completion.

At the end of the Design Phase, the BrightCloud Project Technical Lead prepares and approves a Project Execution Quality Gate Checklist (Appendix 5) that is also approved by the Project Manager.

5.5 Project Implementation

This phase covers the go-live activities for the project. This applies equally well in the case of a system upgrade; migration from an existing platform; or introduction of an entirely new solution. The Project Manager co-ordinates the following key activities:

- Detailed migration/go-live planning which is normally documented in a runbook
- System migration or go-live – either 'big bang' or multiple phases
- Floor walking/day 1 support

5.6 Project Closure

The primary objective during the project closure phase is for the Project Manager to hand over the solution to the BrightCloud Support Team. The Low-Level Design document will be updated to reflect the "as-built" configuration of the solution. This will be the principal document for the handover. The Project Manager will use the Support Handover Checklist (Appendix 6) as the basis of the handover:

In the case of a phased go-live or migration, the handover to Support will also be phased as each user group adopts the solution.

Following the final migration or go-live, the Project Manager arranges a lessons learned meeting to establish which aspects of the project went well and what could have been done better.

The Project Manager sends a completion certificate (Appendix) to the customer and requests final sign off.

The Project Manager instructs the BrightCloud Accounts Team to issue the final invoice for the project.

6. Project Governance

BrightCloud has a well-structured Project Management office (PMO) function that defines, executes, and maintains the standard processes and procedures related to project management. Project governance in BrightCloud is comprised of the following functions:

- Monitoring and control
- Communication planning and escalation management
- Resource management
- Risk and issue management
- Documentation management
- Cost control and invoicing
- Change control

6.1 Monitoring and Control

The frequency and the participants of customer project review meetings are documented in the communication plan, which is agreed with the customer during the kick-off meeting. Project status reports are sent in advance of the project review meetings which are generally held weekly. BrightCloud uses a project workbook that combines project status reporting with a RAID log, a list of project contacts, a deliverables tracker, a milestone tracker, a payments tracker, as required for each individual project. The purpose is to contain all information regarding the project in a single workbook.

The status report contains:

- Reporting date and period
- Next milestone
- RAG status for cost, time, quality and overall
- Status of the current activities and activities planned for the next period
- Status of customer-related issues / commitments
- Other remarks, if any

The exact format of the report can vary, for example not all the tabs are used for every project. This is agreed with the customer at the start of the project. Actions and comments from the review meeting are added to the status report and circulated to all participants of the meeting.

In addition to the prescribed progress meetings with the customer, BrightCloud's PMO reviews each project weekly to verify progress in accordance with the plan and to ensure risks and issues are being effectively managed.

6.2 Communication Planning

The project communication plan defines how critical information will be delivered during the project, by who and to whom, and at what frequency. Throughout a project, successful communication about alignment on goals and milestones is crucial to stakeholder buy-in and transparency of a project's status. BrightCloud recognises that communication is critical to keeping a good relationship with the client. The communication plan establishes, from the very start of the project, how to achieve a shared understanding of what's happening and what should be happening throughout the project. The communication plan also defines the escalation process.

6.3 Resource Management

Resource management is the process of acquiring, allocating and managing the resources required for a project, such as individuals and their skills, finances, technology and materials. Resource management ensures that internal and external resources are used effectively on time and to budget. Resources may be obtained internally

from BrightCloud or procured from external sources. Resource management encompasses human resource management and material management. The Head of Professional Services is responsible for fulfilling all human resource requirements for projects within BrightCloud.

BrightCloud uses the lead-time before starting a project to allocate, procure or assemble human and material resources for the project. This includes technical consultancy, project management, hardware and software, and any other facilities required for the project.

6.4   Risk and Issue Management

Risk management is the process of identifying, quantifying and addressing potential risks in order to minimize the negative impact they may have on an organization. An effective risk management process helps to identify which risks pose the biggest threat to an organization and provides guidelines for handling them.

Risk management is an integral part of BrightCloud's project management methodology. The 4 steps in BrightCloud's risk management process are:

1) Risk identification: Years of experience in deploying projects coupled with well-documented processes help us identify risks and quickly communicate them to the customer. All members of the project team including the customer are encouraged to contribute to the risk management process. Larger and more complex projects will include a risk workshop during the planning phase.

2) Risk assessment: Each risk is quantified in terms of:

   a)   The probability of the risk occurring.

   b)   The impact to the project if the risk were to materialise.

   The probability and the impact are each measured on a scale from 1 to 5, with 1 being the least probability/impact and 5 being the highest. The probability score and the impact score are multiplied together to calculate a severity rating. Severity scores between 1 and 9 are considered low risks; scores between 10 and 18 are medium risks; scores of 19 and above are high risks.

3) Risk mitigation: When a risk is classified as medium or high, an action plan to mitigate the risk must be put in place. If a risk materialises (probability score of 5) then an immediate action must be taken by the Project Manager to address the risk. When the severity of a risk is considered low, it is sufficient to monitor the risk.

4) Risk monitoring: Risk management is a continuous process throughout the project lifecycle. The Project Manager regularly reviews the risks to determine whether the severity has reduced or increased. This establishes whether the mitigating actions are effective, or if further measures must be taken.

6.5   Documentation Management

All project documentation is stored in SharePoint. During the Project Implementation phase, the Project Manager creates the project library. Three folders are created to save the relevant documents:

1) Project Management: for all project governance material such as status reports, project plans, RAID logs.

2) Sales and Commercial: for all commercial information such as SOWs, quotations, effort estimates, purchase orders.

3) Technical: for all technical documents such as HLD and LLD, test plans, test results.

A set of template folders exists in the PMO page in SharePoint. These are pre-populated with the appropriate template documents and are copied to the project SharePoint page.

6.6   Cost Control and Invoicing

During the Initiation phase, the Project Manager will receive the cost estimate that was created by the Pre-Sales Consultant during the Sales Process. This estimate defines the project budget. It is the responsibility of the Project Manager to monitor actual costs and to ensure that the project remains within the planned budget. BrightCloud uses Timeular for time tracking.

The Project Manager is also responsible for ensuring that an invoice is raised whenever a payment milestone is achieved. Payment milestones can be associated with any of the project phases. The Project Manager issues a Milestone Completion Certificate (as per section 5.6 above) and emails the BrightCloud Finance Manager to request an invoice is sent to the customer. Additionally, BrightCloud holds a weekly backlog review meeting attended by the Finance Manager, the Head of Professional Services, the Operations Manager and the Project Managers. The primary objective of this meeting is to review planned project invoicing and to ensure it remains on track.

6.7   Project Change Management

Change management is an important part of the project management process. Many projects will face demands for change during their lifecycles. While change may help ensure the project's alignment with business needs, it is essential to consider and approve each change carefully.

The change management process in BrightCloud ensures that each change proposed during a project is adequately defined, reviewed and approved before implementation. The change control process helps avoid unnecessary changes that might disrupt services and ensures the efficient use of resources.

Change management comprises four stages:

1) Requesting a Change

2) Impact assessment, including effort and cost

3) Decision

4) Implementation

There are two documents used during the process:

Change Register: used to provide a record of all changes requested and decisions made

Small Projects SOW: used to document details of the change, the impact and the cost. The template for the Small Projects SOW is included at Appendix 8.

7. Document Status

7.1 Review Arrangements

This document will be reviewed at least annually or sooner if major organisational changes occur.

Appendix 1

Project Initiation Checklist

Project Details

Project Title	
End Client	
Partner	
Third Party Suppliers	

Project Summary

Summary	
Business Drivers	
Timescale	

Sales Documents

1) Purchase Order ☐

2) Statement of Work ☐

3) Resource Estimate ☐

4) BrightCloud Quote ☐

5) Supplier Quotes ☐

6) Cisco Deal ID ☐

Technologies (Check all that apply)

1) UCCE ☐
2) PCCE ☐
3) CCX ☐
4) WxCC ☐
5) CVP Scripting ☐
6) Outbound ☐
7) ECE ☐
8) CCBox Recording ☐
9) PCI Compliance ☐
10) CCBox Management Portal ☐
11) CCBox Wallboard ☐
12) CUCM ☐
13) Webex Calling ☐
14) Integration ☐
15) Platform Monitoring ☐
16) Others (please list)

Project Deliverables (please list)

1) Project plan ☐
2) RAID log ☐
3) Quality Plan ☐
4) Communications Plan ☐
5) Migration Strategy ☐
6) Test Strategy ☐
7) Training Strategy ☐
8) Training Plan ☐
9) High Level Design Document ☐
10) Low Level Design Document ☐
11) Network ready for use tests plan (NRFU) ☐
12) Unit test plan ☐
13) Integration test plan ☐
14) System Acceptance Test plan (SAT) ☐
15) Operational Readiness Test plan (ORT) ☐
16) User Acceptance Test plan (UAT) ☐

17) Migration Runbook ☐

18) Lessons Learned Report ☐

19) Project Closure Report ☐

Partner Contact Details

Name	
Role	
Phone	
Email	
Address	

Third Party Contact Details

Name	
Role	
Phone	
Email	
Address	

End Client Contact Details

Name	
Role	
Phone	
Email	
Address	

BrightCloud Details (to be completed by Head of PS)

Project Manager	
Lead Consultant	
Date of Handover	
Date Accepted	

Appendix 2

Project Kick-Off Meeting

Project Details

Project Title	
Date of Meeting		Location	

Attendance

	Name	Role	Organisation
Attendees			
Apologies			

Agenda and Meeting Minutes

1) Introductions

2) Project Organisation Structure

3) Project Scope

4) Project Timeline

5) Project Governance and Communication Plan

6) Next Steps

7) AOB

Meeting Minutes:
1.   Introductions
Minutes here
2.   Project Organisation Structure
Minutes here
3.   Project Scope
Minutes here
4.   Project Timeline
Minutes here
5.   Project Governance and Communication Plan
Minutes here
6.   Next Steps
Minutes here
7.   AOB
Minutes here

Actions

Action Requirement	Action Owner	Completion Date

Appendix 3

Project Planning Quality Gate

Project Details

Project Title	
End Client	
Partner	
Third Party Suppliers	

Planning Phase Deliverable Documents

Project Plan ☐

RAID log ☐

Quality Plan ☐

Communications Plan ☐

Migration Strategy Document ☐

Test Strategy Document ☐

Training Strategy Document ☐

Planning Quality Gate Approvals

Project Technical Lead		Date	
Project Manager		Date	
Head of Professional Services		Date	

Project Design Quality Gate

Project Details

Project Title	
End Client	
Partner	
Third Party Suppliers	

Design Phase Deliverable Documents

High Level Design Document ☐

Low Level Design Document ☐

NRFU Test Plan ☐

Unit Test Plan ☐

Integration Test Plan ☐

System Acceptance Test Plan ☐

Operational Readiness Test Plan ☐

User Acceptance Test Plan ☐

Training Plan ☐

Design Quality Gate Approvals

Project Technical Lead		**Date**	
Project Manager		**Date**	

Appendix 5

Project Execution Quality Gate

Project Details

Project Title	
End Client	
Partner	
Third Party Suppliers	

Execution Phase Deliverables

Network Readiness Test Results ☐

Staging, Configuration and Unit Test Results ☐

Integration Test Results ☐

System Acceptance Test Results ☐

Training Completed ☐

User Acceptance Test Plan ☐

Operational Readiness Test Results ☐

Execution Quality Gate Approvals

Project Technical Lead		**Date**	
Project Manager		**Date**	

Appendix 6

Support Handover Checklist

Project Details

Project Title	
End Client	
Partner	
Third Party Suppliers	

Project Summary

Summary	
Business Drivers	

Project Documents

Support Purchase Order ☐

Maintenance Agreement ☐

Third Party Support POs ☐

LLD/'As built' document ☐

Full access to all servers and environments ☐

Server matrix ☐

Passwords ☐

Network diagrams ☐

Details of set up charges ☐

Monitoring requirements ☐

Technology (Check all that apply)

1) UCCE ☐
2) PCCE ☐
3) CCX ☐
4) CVP Scripting ☐
5) WxCC ☐
6) WxC ☐
7) Outbound ☐
8) ECE ☐
9) CCBox Recording ☐
10) PCI Compliance ☐
11) CCBox Management Portal ☐
12) CCBox Wallboard ☐
13) Integration ☐
14) Monitoring ☐
15) Others (please list)

Remote Access Details

Partner NOC Contact Details

Name	
Role	
Phone	
Email	
Address	

Third Party NOC Contact Details

Name	
Role	
Phone	
Email	
Address	

BrightCloud Details (to be completed by Head of Support)

Remote Access Tested	☐
Date of Handover	
Date Accepted	

Appendix 7

Project Completion Certificate

Dear Customer

Please confirm that the project or milestone below is now complete.

If you wish to provide any additional feedback, please include this in the comments section.

Project Details

Project/Milestone Description	
End Client	
PO Number	

Customer Approvals

Confirmed by (name):			
Role:			
Signature		**Date:**	
How satisfied are you with BrightCloud Group?		Choose an item.	
Would you work with BrightCloud again?		Choose an item.	
Comments			

Yours sincerely,

A N Other

Project Manager

BrightCloud Group

Appendix 8: Small Projects SOW

1.0 CLIENT DETAILS:	
End Client:	**End Client CONTACT:**
Partner:	**Partner CONTACT:**
BrightCloud:	**BrightCloud CONTACT:**
CORE PROJECT TITLE:	
ADDITIONAL REQUIREMENTS TITLE:	

2.0 CHANGE DETAILS:	
CHANGE REF:	**BD CONTACT:**
TECHNICAL CONTACT:	**PROJECT MANAGER:**

3.0 BACKGROUND SUMMARY:

4.0 CLIENT/CHANNEL REQUIREMENTS:

5.0 BRIGHTCLOUD RESPONSE:

6.0 PROFESSIONAL SERVICES SUMMARY:

Activity	Days	Notes
Kick Off / Design		
Development / Installation		
Testing		
Implementation / Go Live		
Training / Handover		
Project Management		
Other *(Please Detail)*		

7.0 BRIGHTCLOUD SUPPORT SERVICES SUMMARY:

		Notes
		Not included
Remote Access Required?		
Other *(Please Detail)*		

8.0 ASSUMPTIONS AND CAVEATS:

9.0 COMMERCIAL CONSIDERATIONS:

Disclaimer:

This Document is for information purposes only and represents the current agreement between BrightCloud and the End Client / Partner with regard to design of the solution. The parties agree that this Document is not intended to be contractually binding and the solution outlined in this Document is strictly Subject to Contract.
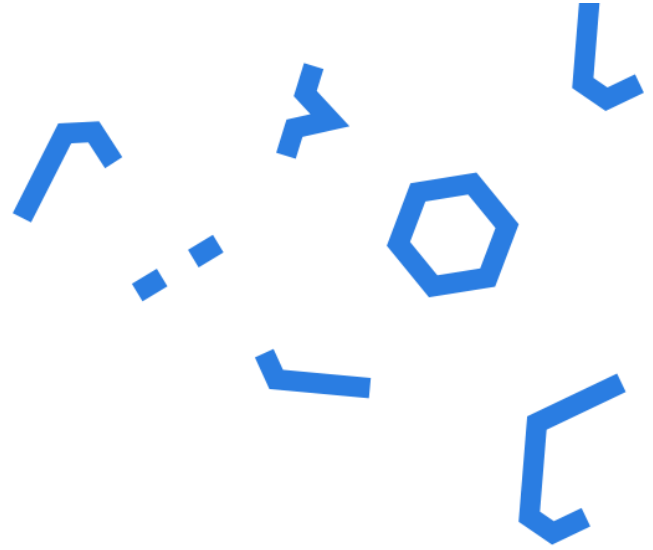
Receipt of a valid PO is required in order for any works to commence

All works to be undertaken remotely

This document is subject to BrightCloud standard terms and conditions

10.0 VERSION CONTROL:

VERSION:	AUTHOR:	RELEASE DATE:	REASON FOR ISSUE:
1			Customer request

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