Implementations - How To Implement a Custom Development Project

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This guide will explain the necessary steps for implementing a Custom Development Project. A Custom Development Project will begin with sales and have stakeholders from both the Development and Implementation teams. Together, these teams will complete the outlined steps below in order to successfully deliver the project.

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Step 1: Kick-Off Call With Stakeholders

The first step in the process is for all project stakeholders to meet in a Kick-Off call. The required stakeholders for this step are the Director of Development, Software Architect, Project Manager and all customer stakeholders. The objective of this kick-off call is to set expectations for the project and evaluate the proper timeline. During this discussion, the Project Manager will set the grounds for weekly recurring communication.

Step 2: Review Scope of Work and Timeline

The Project Manager should then review the entire scope of the project, including any predetermined tasks or scheduling items. At this point in the process, the Project Manager should have a completed Project Plan that outlines each project milestone and its respective due date.

Step 3: Set Up Weekly Call/E-mail Communication

Throughout the entirety of the project, the Project Manager is responsible for weekly communications with the customer. These communications can be done via call or email. The weekly updates should include any outstanding items, an update of the current project progress and the next steps to be completed.

Step 4: Final Testing and Review (DEMO)

After completing all project tasks, the stakeholders will meet again to review and approve all custom development changes that have been made. All stakeholders are required to attend this meeting, as this meeting will serve as an approval for the work that has been completed. During this meeting, the technical resource will demonstrate for all stakeholders that the change requested is both successful and complete. With the custom development approved, the Project Manager will send and introduce the Custom Development Project Sign-Off to the customer.

Step 5: Custom Development Sign-Off Returned and Project Closed

Once the customer has had an opportunity to review the changes live in production, they are required to return a signed and dated copy of the Custom Development Project Sign-Off. The receipt of this document will act as confirmation to the project's closure. The Project Manager can then upload the Custom Development Project Sign-Off to the CRM and close out the project.