

The Cloudtech Approach to Delivering Projects

Business and Technology Driven

Cloudtech approaches all Client engagements from a business perspective. Technology by itself is never the answer.

We have a simple philosophy of faster, cheaper, better and safer. If your project doesn't provide an improvement in at least one element of the four for your business – then don't do it.

Unless we fully understand our Client's business processes and how the business then engages with their Clients we don't feel we can put forward any technology proposals that will make sense. We always look to ensure that our Clients understand the importance of establishing a return on investment case – before they make any buying decision. If you have no way of measuring a change in the business (for better or worse!) then why start the project?

Don't just hope that it is going to work.

We will provide the Client with a Business Process Review (BPR) Questionnaire before we engage at the solution level. The Client completes the BPR Questionnaire obtaining input from all key stakeholders. The Questionnaire covers all business processes from marketing and campaign management, lead generation and qualification, sales processes, selling styles, pipeline and opportunity management, partners and channels (B2B, B2C, B2B2C), financials, fulfilment, case management, Client servicing, support and business metrics (top down and bottom up). It asks questions regarding internal business systems and any possible integration or synchronisation with line of business applications, requirements for data extraction, transformation and loading (ETL). We also look for immediate and future training requirements (and delivery styles).



Collaborative Working

Cloudtech will always provide the Client with a free collaborative working environment right from the first sales engagement.

This is used to capture and store all information, provide a forum for discussion threads and 'what if' questions, a project calendar and personalised 'to do' lists. The aim is to provide a completely transparent means of ensuring that all parties have

secure access to the most up to date and relevant information – and importantly – the delivery team is involved via the collaborative working tool right through the sales process thus avoiding that nasty 'discovery' phase (when the delivery team discover the gap between what the Client thinks they've bought and what has been sold to them!).

Business Process Review Workshop

Cloudtech starts every project with at least one BPR Workshop. Our consultant will review the BPR Questionnaire and plan out the workshop in line with the responses to the document. The aim of the workshop is to make sure that all the key stakeholders participate, get involved with, agree and commit to the outcomes of the workshop. It is surprising just how many businesses don't have a commonality of understanding as to how the 'as is' processes work or what the new 'to be' ones should look like.

Our consultants act as a catalyst or change agent and help the key decision makers in the organisation recognise, adapt to and accept changes in their business processes, culture and ethos. We will document a road map showing where the business is at the moment and possible future phases of continuous improvement. It is vitally important for us to understand where the business wants to go over the next 18 to 24 months so that we can design and architect the right framework at the start. If that is not in place then you could end up with some very costly rework later on in future phases of the program.

The workshop provides the initial information and template for building the Phase 1 solution.

Implementation

Cloudtech is able to tailor its approach depending upon the business requirements.

We will bring in and use additional advanced technology resources in order to provide quality assurance and 'sanity checking' where required.

The Cloudtech Approach to Delivering Projects

Projects - Detailed approach

For the majority of projects our approach is typically as follows (we can tailor this according to need) –

- | | |
|---|--------------------|
| 1. Produce and agree the Statement of Work (SOW) | Cloudtech |
| 2. Produce a high level Project Initiation Document (PID) | Client & Cloudtech |
| 3. Conception & non-functional Proof of Concept | Client & Cloudtech |
| 4. Review existing documented requirements | Cloudtech |
| 5. Review existing applications | Cloudtech |
| 6. Carry out detailed business analysis workshops | Client & Cloudtech |
| 7. Capture, document and agree final user and business requirements | Client & Cloudtech |
| 8. Design Stage | Cloudtech |
| 9. Develop High Level Functional Specifications | Cloudtech |
| 10. Review possible 3 rd party applications to be used | Client & Cloudtech |
| 11. Provide Detailed Effort & Costs to Client | Cloudtech |

-
- | | |
|---|-----------|
| 12. Develop Detailed Functional Specifications | Cloudtech |
| 13. Develop Technical Specifications | Cloudtech |
| a. Possible use of declarative or ‘point & click’ configuration | |
| b. Custom build using appropriate tools/codes/etc. | |

-
- | | |
|---|--------------------|
| 14. Build | Cloudtech |
| 15. Unit / System / Stress Test & Rebuild | Cloudtech |
| 16. Quality Assurance | Cloudtech |
| 17. User Acceptance Testing 1 | Client |
| 18. Re-work & Re-test | Cloudtech |
| 19. User Acceptance Testing 2 | Client |
| 20. Re-work & Re-test | Cloudtech |
| 21. User Acceptance Testing 3 | Client |
| 22. Training & Handover | Cloudtech / Client |

-
- | | |
|---------------------------------|--------------------|
| 23. Go Live | Cloudtech / Client |
| 24. Post Implementation Support | Cloudtech / Client |

This methodology can be a mixture of rapid application and/or Agile development and we can also operate with a traditional ‘waterfall’ style of project management. The project management, scoping and workshops will be run locally onsite. We will utilize the best development resources – the build can be either onsite or offsite.

All testing and Quality Assurance is carried out locally by Cloudtech and we can include specialist resources as required. Final sign off, Go Live and Post Implementation Support will be carried out locally.

Project Governance and Methodology

Requirements

Experience has shown that a Consultants understanding of a Client’s requirements are key to the satisfactory outcome of any Cloud implementation. A misaligned understanding not only results in increased development time and expense while features are updated, but it can also result in a poor end-user experience and sub-optimal use of the Cloud platform.

For this reason it is important that the Client acknowledges that they have responsibility to facilitate the Consultants understanding of the requirements and that time invested in structured communication will result in a smoother and more effective implementation. The Client is further advised that all working days should be scheduled where possible to be contiguous in order to facilitate the most efficient use of both the Client’s and the Consultant’s time.

Consultant’s Obligations

Cloudtech will assign a Sales or Account Manager and a Delivery Manager to the Client. All Cloudtech project resources will report to the Delivery Manager.

Cloudtech will provide a Statement of Work (SOW).

The purpose of the SOW is to set out the general scope and terms of the professional services to be delivered by the Consultant.

The Consultant will provide the following Professional Services to the Client –

- Program & Project Management
- Research & Analysis
- Consulting
- Configuration
- Development
- Data Analysis and Migration
- Testing
- Training
- Implementation
- Support Services



Client’s Obligations

The Client shall be responsible for the following –

- Assign a dedicated internal project manager as a single point of contact for the Consultant for the duration of the project defined by the SOW

In addition, the Client agrees to provide assistance, cooperation, information, data and resources reasonably necessary to enable the Consultant to perform the Professional Services. The Client acknowledges that the Consultant’s ability to provide Professional Services as described in the SOW may be affected if the Client does not provide reasonable assistance as set forth above.

The Cloudtech Approach to Delivering Projects

Project Governance

Project Sponsor

Where appropriate the Client will establish a Project Sponsor and a Steering Board. The Consultant will attend and report to the Steering Board as required.

Project Management

Each party shall designate a Project Manager who shall work together with the other party's project manager in order to facilitate the efficient delivery of the Professional Services and any work items defined in the contract.

The Project Manager will attend and report to the Steering Board as required.

Project Reporting and Documentation

Suitable project reporting will be agreed between the Client and the Consultant and maintained at regular intervals.

The Project Manager will set up and maintain a collaborative working environment where project documentation will be located.

Project Kick-Off Meeting

The Cloudtech Delivery Manager (and optionally the Account Manager) and Project Manager will organize a Kick-Off Meeting with the Client's project team in order to ensure that there is complete agreement over the project and to plan out the initial stages and work schedule.



Project Meetings and Milestones

Project Meetings will be held at regular intervals (at least weekly) and to an agreed agenda. The Cloudtech Delivery Manager will provide project templates as required.

Milestones will be identified from the work items and reported against in the Project Meetings.

Quality Assurance

Quality Assurance will be agreed between the Client and the Consultant and monitored at regular intervals. Exceptions to the agreed levels of Quality Assurance will be highlighted by the Project Manager in an exceptions report to the Steering Board.

Application Hand Over and Acceptance / Completion meeting

At the end of the project when the work has been completed the Cloudtech Project Manager in conjunction with the Client will hold an Acceptance / Completion meeting in order to sign off that the work has been completed in line with the contract. It should be noted that unless agreed as part of the contract it is the delivery and acceptance of the work items that constitutes the completion of the project.

Post Project Review

Where required a post project review session will be held by the Cloudtech Delivery Manager and Project Manager in conjunction with the Client and a 'lessons learnt' document will be completed and distributed to all parties.

Change Request

In order to make a change to the description of the Professional Services the Client must submit a written change request to the Consultant specifying the proposed changes in detail. The Consultant will analyse the impact and submit to the Client an estimate of any potential costs associated with the requested changes (“Change Request”). The Consultant will continue performing the Professional Services in accordance with the existing contract until the parties agree in writing on the change in scope of work, scheduling, and fees. Any Change Request shall be agreed to by the parties in writing prior to implementation of the Change Request.

Should the Consultant wish to make a change to the contract the Cloudtech Project Manager will submit a written change request to the Client specifying the proposed changes in detail. The Consultant will analyse the impact and submit to the Client an estimate of any potential costs associated with the requested changes (“Change Request”). The Consultant will continue performing the Professional Services in accordance with the contract until the parties agree in writing on the change in scope of work, scheduling and fees.

Delay Notice

Should the Client be responsible for a Delay that impacts the ability of the Consultant to continue to carry out the contract the following procedure will be used –

- The Consultant will proactively highlight to the Client any indications of potential Delays.
- The Consultant will try and ensure that every attempt is made to continue to deliver the contract.
- The Consultant will raise and issue a Delay Notice to the Client and the Account Manager as soon as possible in order to advise the Client that work can no longer be carried out.

The Delay Notice will note the following –

- Name and contact details of the Consultant
- Time and date the Delay started
- What work has been stopped
- Any other possible impact to the project if the Delay isn’t addressed

The Client will be responsible for resolving the Delay as quickly as possible and keeping the Consultant informed as to the ongoing status. The Client will raise and issue a Continuation Notice to advise the Consultant that the Delay has been cleared and that the work can continue. The Client will advise the Consultant as to the time and date when the work can be restarted.

Acceptance

Upon completion of the project, the Consultant shall provide a final checklist of work items completed to the Client. At the Client’s request, the Consultant will demonstrate to the Client the functionality of the work items. The Client shall be responsible for any additional review and testing of such functionality.

If the Client, in its reasonable and good faith judgment, determines that the work completed does not perform such functionality as outlined in the contract, the Client shall have an acceptance period lasting ten (10) working days after the Consultant’s submission of the functionality to give written notice to the Consultant specifying the deficiencies in detail. The Consultant shall use commercially reasonable efforts to promptly cure deficiencies within twenty (20) working days of such notice. After completing any such cure, the Consultant shall resubmit the checklist of items for review and testing as set forth above. Upon accepting the functionality submitted by the Consultant, the Client shall provide to the Consultant a written acceptance of such functionality.

Notwithstanding the foregoing, if the Client fails to reject the functionality within the acceptance period and in the manner described above, such functionality shall be deemed accepted at the end of the acceptance period.

Where the Consultant has carried out any work for the Client where it is agreed that such work is defective then the Consultant accepts that it is responsible for all rework effort and costs.