

cuttlesoft

# Example Client, Inc.



## Project Primer

### **Statement of Confidentiality**

This proposal and any supporting materials contain confidential and proprietary information of Cuttlesoft. These materials may be printed or photocopied for use in evaluating the proposed project, but are not to be shared with other parties.

# Outline

1. Overview
2. Artifacts We'll Share
3. Touchpoints with Your Team
4. Deliverables We'll Provide
5. Next Steps



# 1. Overview

## **Project Goals**

- Deliver a product that meets the project's intended success criteria and objectives
- Deliver the project on time and within budget
- Closely monitor and protect progress throughout the project

## **Today's Goals**

- Establish a basis for expectations around project execution
- Prepare for the development phase of the project



## 2. Artifacts

Project Charter	Project Registers	Project Plan
<ul style="list-style-type: none"><li>▪ Frame project business case</li><li>▪ Ensure alignment amongst sponsors &amp; stakeholders</li><li>▪ Primary reference for the project</li></ul>	<ul style="list-style-type: none"><li>▪ Central store of project risks, issues, &amp; action items</li><li>▪ Continuously reviewed</li></ul>	<ul style="list-style-type: none"><li>▪ Schedule of functional deliverables &amp; milestones</li><li>▪ Facilitates progress reporting and project health status</li></ul>



## 3. Meetings

Project Kick-off	Status Meetings*	Sprint Demos**
<b>When:</b> Prior to development	<b>When:</b> Every <u>even</u> week	<b>When:</b> End of every sprint
<ul style="list-style-type: none"><li>▪ Formal agreement of functional requirements</li><li>▪ 1st risk analysis workshop</li></ul>	<ul style="list-style-type: none"><li>▪ Touchpoint of current status; time for any critical items, clarifications or resolutions</li></ul>	<ul style="list-style-type: none"><li>▪ Showcase of accepted work</li></ul>

\*May be increased to weekly based on need

\*\*May be combined with Status Meeting to use time wisely



## 4. Deliverables

Project Status Reports	CSAT Surveys	Final Product
<b>When:</b> Weekly on Mondays	<b>When:</b> Throughout the project after each major phase	<b>When:</b> End of project
<ul style="list-style-type: none"><li>▪ Review of completed items, current focus, and any impediments to the project</li><li>▪ Project health status</li></ul>	<ul style="list-style-type: none"><li>▪ Brief surveys to gather feedback on Cuttlesoft's performance</li></ul>	<ul style="list-style-type: none"><li>▪ Delivery of final project</li><li>▪ Initiation of project closing &amp; handoff</li></ul>

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# Next Steps

1. Requirements Review
2. Project Kick-off
  - a. Risk Analysis
  - b. Project Rules
3. Start Development

[Let's start something. Setup a free consultation.](#)