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

<table>
<thead>
<tr>
<th>Project Charter</th>
<th>Project Registers</th>
<th>Project Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frame project business case</td>
<td>Central store of project risks, issues, &amp; action items</td>
<td>Schedule of functional deliverables &amp; milestones</td>
</tr>
<tr>
<td>Ensure alignment amongst sponsors &amp; stakeholders</td>
<td>Continuously reviewed</td>
<td>Facilitates progress reporting and project health status</td>
</tr>
<tr>
<td>Primary reference for the project</td>
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</tbody>
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- Frame project business case
- Ensure alignment amongst sponsors & stakeholders
- Primary reference for the project

- Central store of project risks, issues, & action items
- Continuously reviewed

- Schedule of functional deliverables & milestones
- Facilitates progress reporting and project health status
# 3. Meetings

<table>
<thead>
<tr>
<th>Project Kick-off</th>
<th>Status Meetings*</th>
<th>Sprint Demos**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When</strong>: Prior to development</td>
<td><strong>When</strong>: Every <strong>even</strong> week</td>
<td><strong>When</strong>: End of every sprint</td>
</tr>
<tr>
<td>- Formal agreement of functional requirements</td>
<td>- Touchpoint of current status; time for any critical items, clarifications or resolutions</td>
<td>- Showcase of accepted work</td>
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<tr>
<td>- 1st risk analysis workshop</td>
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</tbody>
</table>

*May be increased to weekly based on need
**May be combined with Status Meeting to use time wisely
## 4. Deliverables

<table>
<thead>
<tr>
<th>Project Status Reports</th>
<th>CSAT Surveys</th>
<th>Final Product</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When:</strong> Weekly on Mondays</td>
<td><strong>When:</strong> Throughout the project after each major phase</td>
<td><strong>When:</strong> End of project</td>
</tr>
<tr>
<td>▪ Review of completed items, current focus, and any impediments to the project</td>
<td>▪ Brief surveys to gather feedback on Cuttlesoft’s performance</td>
<td>▪ Delivery of final project</td>
</tr>
<tr>
<td>▪ Project health status</td>
<td></td>
<td>▪ Initiation of project closing &amp; handoff</td>
</tr>
</tbody>
</table>
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.