



# Temenos Implementation Methodology - TIM

INFINITY

Author

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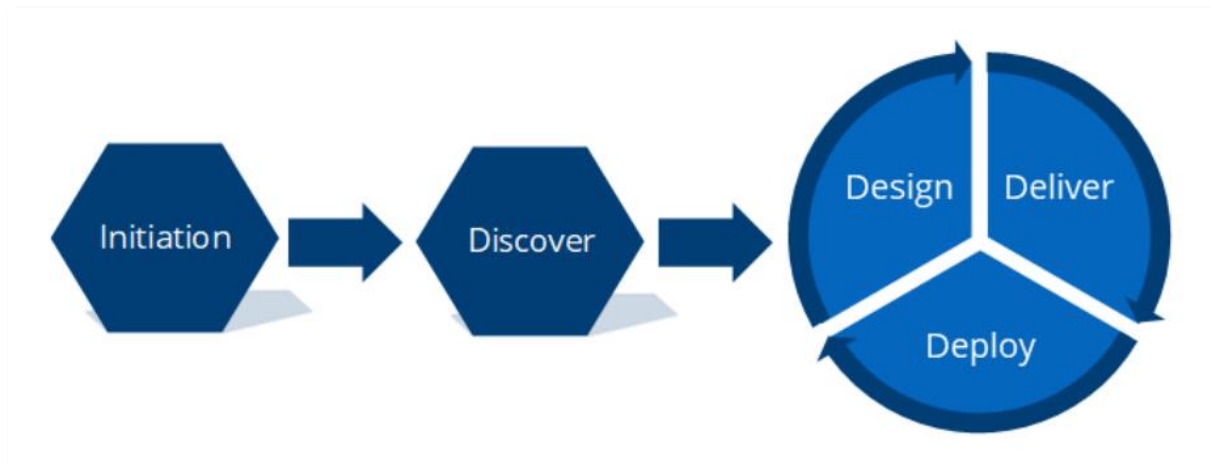
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## 1. TIM for Infinity

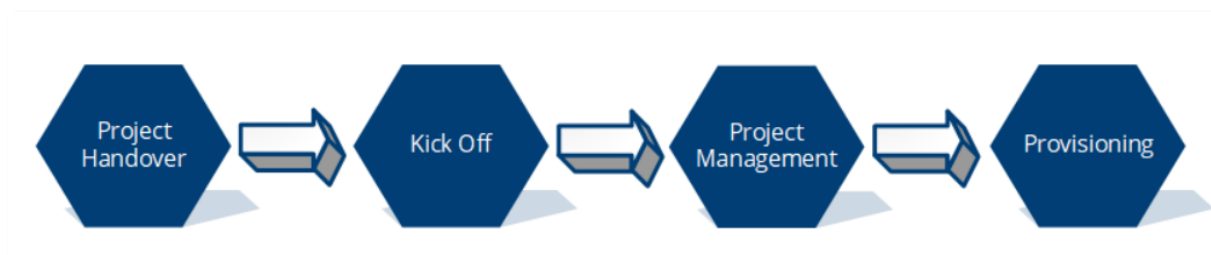
The TIM for Infinity provides our Services organisation with structured delivery processes which create defined value for our Clients. The TIM provides a roadmap that clearly communicates essential steps and ensures that each step is fulfilled.

It is a process-driven approach, so that each activity in the implementation is clearly identified with a step-by-step documented procedure guide for each process step.



## 2. Phases of TIM for Infinity

### 2.1. Initiation

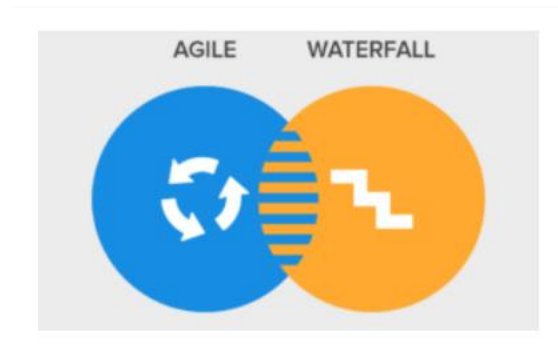


All Infinity project implementations will be delivered using the TIM for Infinity.

The exact approach used needs to be right for the prospect, therefore an agile maturity assessment is undertaken to ascertain this prior to signing the SOW, with alignment to the Client's own delivery methodology being considered.

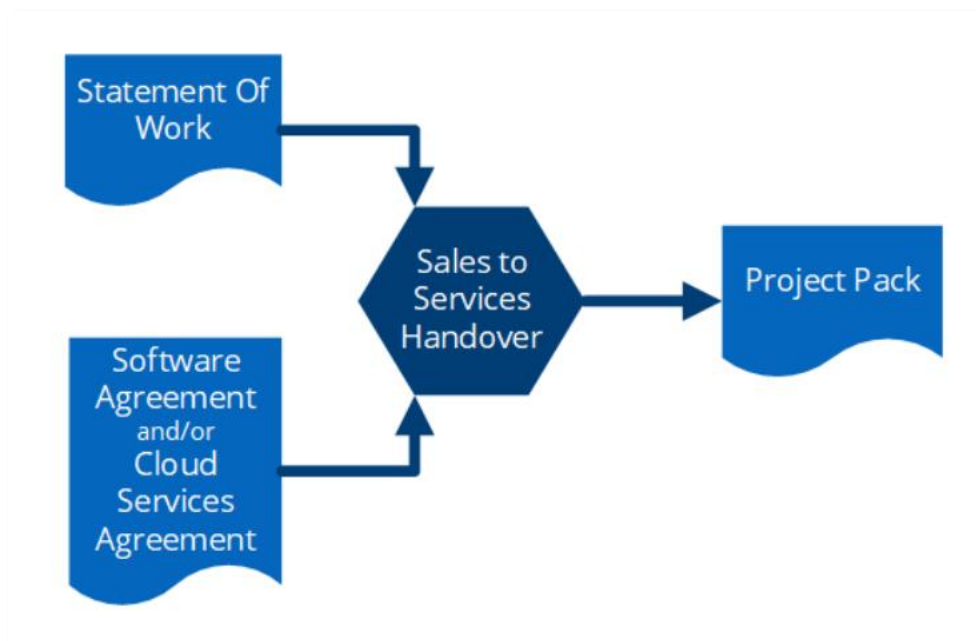
Infinity project deliveries can be located on Client premises or fully remote but will usually be comprised of a mix of people from onshore/nearshore and offshore resources.

The TIM for Infinity contains elements of both traditional waterfall and agile concepts, as a very effective method of technical project delivery.



The methodology applies, where possible, a level of agility using principles/methods of agile with some of the formal practices of Waterfall.

### 2.1.1. Handover to Services



### 2.1.2. Overview

During the sales cycle, the sales, pre-sales (BSG) and Client engagement (CEM) teams gather a significant amount of information. The purpose of this process is to ensure an effective handover of this information to the Services project implementation team.

Where the project is to be implemented on Temenos Cloud, the assigned Cloud Delivery Manager (CDM) must be involved in pre-contractual discussions on the number and types of environments to be provisioned.

The key inputs to the process are the Statement of Work (SOW) and the Software Agreement and/or Cloud Services Agreement. It may also be useful to review the RFI/RFP response.

A Client may sometimes feel frustrated when forced to cover old ground with the implementation team. While there is always a degree of catch-up required by the implementation team, Client frustration can be kept at a minimum, if the Handover process is executed efficiently.

The Product development team and the implementation consultants must also be included in the Handover process to ensure the development and the expected implementation tasks are communicated.

During the Handover procedure, the PM should review the accuracy of the gap list by comparing the contents of T-Focus and the Software Agreement and/or Cloud Services Agreement and the SOW. It should be noted that BSG often upload functional and integration requirements into T-Focus using a standard template.

**Note:** There are two SOW templates, one for standalone Infinity and one for a joint Transact/Infinity implementation.

#### **2.1.2.1. Review Documentation Gathered by Sales, Pre-sales, Cloud Delivery Manager and Client Engagement Teams**

Not all information gathered during the sales cycle is relevant for Handover.

- The emphasis is not on delivering all documentation, but to Handover the most appropriate information.
- It is important for the sales, pre-sales and Client engagement teams to contribute in this process.
- It is the responsibility of the CEM or partner equivalent to manage this process.

#### **2.1.2.2. Produce Project Pack**

An index of the available documents should be compiled for the use of the project team.

All relevant documentation should be collated into an adhoc Project Pack and distributed to the project team.

#### **2.1.2.3. Produce Agenda**

The workshop agenda should represent the information contained in the Project Pack.

- A handover lasts from a couple of hours for a simple project to a couple of days for a complex project.
- We recommend using an agenda template.

#### **2.1.2.4. Arrange Convenient Time for Attendees, and Distribute Agenda and Project Pack**

It is important the whole project team attends the Handover. For large projects, when a project team is mobilised over several weeks, the handover may need to be repeated.

- Once the project team is identified and a convenient date is arranged, then the project pack and the agenda should be distributed.
- Sufficient time is provided to review the documentation in advance of the handover meeting.

#### **2.1.2.5. Review the Sales to Services Handover Checklist**

Ensure the Sales to Services Handover Checklist is reviewed and ready for distribution.

#### **2.1.2.6. Review Background Documentation**

Once the project pack is distributed, it is the responsibility of the project team to review the project pack before the workshop.

Relevant questions should be sent by the project team to the PM, for collation in advance of the handover workshop.

The PM should distribute the compiled questions to the CEM, sales and pre-sales representatives.

#### **2.1.2.7. Conduct Handover**

The purpose of the sales presentation is to introduce the Client to the project team and provide some background on the intelligence gathering during the sales process.

The areas that should be covered in the presentation are listed below; the list is not exhaustive as more items may be added:

- Client Overview (Size/Line of Business/Locations)
- Business Strategy
- Project Rationale
- Organisation Chart
- Key Individuals: Friends and Foe
- Political Landscape
- Previous Implementation Experience
- Contract Details (payment terms, milestones, termination clauses, unusual acceptance criteria, expenses clauses)
- Gaps & Interfaces (commercial terms and timing commitments)

#### **2.1.2.8. Close the Handover Process**

Any actions raised during the meeting should be assigned to an owner and should contain a delivery date. The issues and actions logs should be updated.

### **2.1.3. Kick Off**

#### **2.1.3.1. Project Preparation**

This procedure takes the SOW, produced prior to contract signature, and reviews the contents. Achieving a clear, unambiguous agreement on the aims and objectives of the implementation and on the way those objectives will be met is an essential pre-requisite for the smooth execution and the successful outcome of the project.

In addition to the above, the PM creates a Project Initiation Document. Amongst other content, this document will provide details of items such as accommodation and travel arrangements, team contact numbers, dress codes, rules of the implementation site, Health and Safety procedures related to the implementation site, etc.

##### **2.1.3.1.1. Project Plan**

The PM reviews the Project Plan to:

- Ensure that all activities are adequately resourced
- Ensure alignment with the Client to confirm resource availability

The PM amends the plan as needed, to reflect any constraints identified during the resources review and after discussions with the Client's Project Manager.

##### **2.1.3.1.2. Communication Plan**

Usually the high-level Communication Plan, if defined in the SOW, is relatively standard and does not specify the attendees, the detailed objectives and responsibilities, the minutes, templates, etc. The PM will discuss and agree all these points at this stage.

The PM needs to draft, agree and publish a Communication Plan, to reflect the changes identified during the discussions referred to earlier.

#### **2.1.3.1.3. Risk Log**

The Regional Governance team will produce an initial Risk Log, using information from T-Force, and pass this to the PM for review.

The PM is responsible for managing risks; this is best achieved through the use of a fully up-to-date Risk Log.

#### **2.1.3.1.4. Change Management**

Usually the Change Management Plan is defined in the SOW in a very high-level generic way. The Change Management Plan must be tailored to suit each individual project, considering any Client variables and/or constraints.

For example, should there be a limit on the number of changes that can be raised during a specific period? Is analysis of the requested change chargeable to the Client? If not, does the cost of analysis get rolled into the Client estimate once a change is accepted? What is the turnaround time for producing an estimate in response to a CR?

The PM must produce, distribute and agree a Change Management Plan, using the answers to the questions above and any other relevant issues. This is best done during the Initiation Stage of a project in order to set the ground rules for the remainder of the project.

#### **2.1.3.2. Prepare Project Initiation Document**

The PM prepares the PID using the standard TIM template.

The document should be circulated as appropriate amongst the project team and a copy stored in the relevant project SharePoint.

### **2.1.4. Project Management**

#### **2.1.4.1. Identify project stakeholders, reviewers and approvers**

This activity covers identification of key stakeholders who will review and sign-off the Client's requirements.

In most cases, Client stakeholders are likely to include:

- Client Project Manager
- Product Owner
- Business Analyst
- Technical Lead
- QA Lead
- UX Experts/Designers
- Legal/Compliance
- Marketing

#### **2.1.4.2. Setup Governance Process**

In order that the project can be properly overseen, the PM needs to work closely with the Governance Team and where appropriate, with the TCSP team to ensure that project monitoring and reporting is fully and accurately populated.

For FP it is often the case that a milestone payment is aligned with the delivery of the initial software (see Provisioning). If this is the case, the PM must use the template to produce a bespoke Milestone



Acceptance Certificate which must be signed by the Client and passed to the CAT team for processing.

### 2.1.5. Provisioning

The Infinity PM is accountable for ensuring that Temenos has provisioned the contractual cloud environment with the licensed applications by requesting the relevant environments from the CDM at least 5 business days before the environments are required.

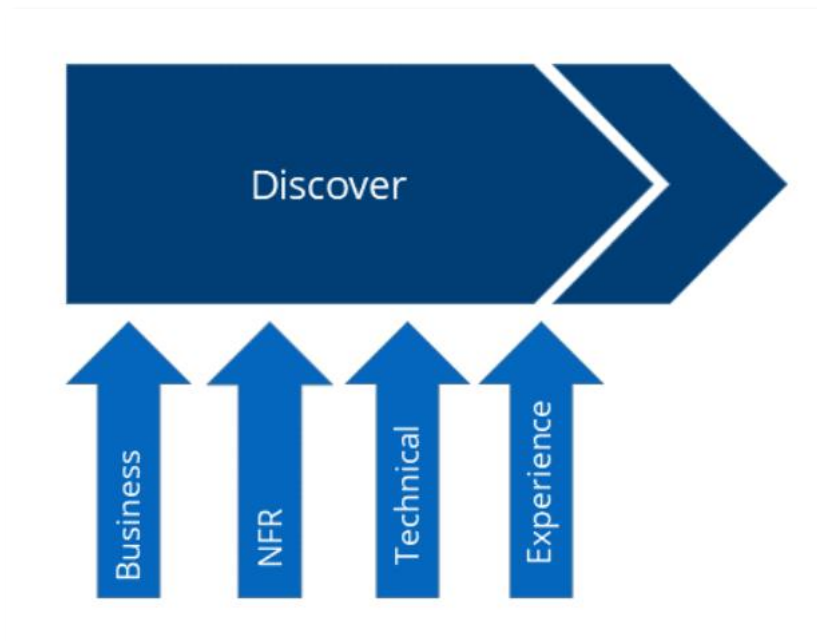
The CDM is then responsible for acting upon the request from the PM and ensuring that the requested environments are provided, as per the SOW and the Cloud Services Agreement.

The Infinity PM must ensure full engagement from the assigned Cloud Delivery Manager. Over the course of the project, the PM will ensure that Temenos is ready to take the Client into Production on the Temenos Cloud.

The PM must be fully conversant with the requirements of the Operational Readiness Board and ensure that the project has fulfilled all of the pre-conditions outlined in the ORB Checklist.

Any additional environments will be requested following the process described above.

## 2.2. Discover



This Section describes in detail the how this stage of an Infinity project implementation should be conducted. It describes the scope, roles and responsibilities, activities, inputs and outputs along with entry and exit criteria.

The Discover Stage is the analysis phase of the project and the Infinity Project team should use these process descriptions when planning and executing the Discover stage.

### Prerequisites

The following artefacts are the inputs to the Discover stage:

- Signed off Services SOW outlining the scope, implementation approach, deliverables, dependencies, conditions, assumptions and governance for the implementation at the Client of the software solution described within.

- Project Plan - Generated by Infinity PM during the Initiation Stage of the Project, describing the activities, their sequencing, resourcing and dependencies.

### Key Activities

Depending on the size and complexity of the Client's needs, a series of workshops over a number of days will be scheduled to enable the implementation team to gather a clear understanding of the main aspects of the project, through the Discover workshops, held with the corresponding workstreams.

As a general guidance: When the core banking (manufacturing) system is Transact, it is strongly advisable, the Transact BC/TC to be part of the Infinity Discover workshops and vice versa based on the implementation sequences.

### 2.2.1. Business Requirements Discover

The business workstream is facilitated by the Infinity PM and Lead BC / Lead TC.

The activities consist of:

- Identify project stakeholders, reviewers, and approvers
- Walkthrough the Base Product features and documented Base Product User Journeys
- Agree on the Base Product features to be adopted as part of the to-be solution
- Discuss the Client's business requirements
- Analyse the functional gaps between the Infinity base product and the Client's requirements
- Assisting the Client in preparing the User Stories
- Identify all 3rd party integrations required
- Validate/update the High-Level Scope (as described in the SOW)
- Define the NFRs. It is important to ensure that Non-Functional Requirements are comprehensively documented during the Discover stage. These include, but are not limited to, the following:
  - Performance
  - Security
  - Availability
  - Devices
  - Load/Stress
  - Resilience/Error Handling
  - Compatibility
  - Usability
  - Monitoring/Logging
  - Compliance
  - User Administration requirements: The Client should document clearly all required user accesses. User management is defined by two major parameters:
    - Access Role: The User Role should answer the questions: "Who is the user? What can he/she do on the system? What banking functionality can he use?"
    - Access Permission: The Access Permission should answer the questions: "What positions has a user access to? What permission has the user on this position?"
- Agree on the dates for the delivery of the signed-off Client business requirements for review

## Outputs

- Client's business requirements, either in the form of Business Requirements Document(s) or some other acceptable format, such as Jira - Produced by the Client and signed off by the implementation BC
- Non-Functional Requirements document - Produced by the Client and signed off by the implementation Solution Architect/TC
- Integration Requirements Document - Produced by the Client and signed off by the implementation Solution Architect/TC
- Client's Test Strategy Document - with focus on functional testing
- Draft Project Backlog

### 2.2.2. Non-Functional Requirements Discover

The Non-Functional workstream is facilitated by the Infinity PM and Solution Architect/Lead TC.

The activities consist of:

Define the NFRs. It is important to ensure that Non-Functional Requirements are comprehensively documented during the Discover stage. These include, but are not limited to, the following:

- Performance
- Security
- Availability
- Devices
- Load/Stress
- Resilience/Error Handling
- Compatibility
- Usability
- Monitoring/Logging
- Compliance

User Administration requirements: The Client should document clearly all required user accesses.

User management is defined by two major parameters:

- Access Role: The User Role should answer the questions: "Who is the user? What can he/she do on the system? What banking functionality can he use?"
- Access Permission: The Access Permission should answer the questions: "What positions has a user access to? What permission has the user on this position?"

If the required NFRs are not aligned with the SOW and/or the Cloud SLAs, then the PM must follow the established Change Management procedure.

## Outputs

- Non-Functional Requirements document - Produced by the Client and signed off by the implementation Solution Architect/TC
- Client's Test Strategy Document – with focus on Non-Functional Testing to ensure a comprehensive test strategy covering both NFT and UAT
- Draft Project Backlog

### 2.2.3. Technical and Architecture Discover

The technical and architecture workstream is led and facilitated by the Infinity PM and the Solution Architect.

The activities consist of:

- Review the Client's current technical/ architecture landscape/ ecosystem into which the Infinity solution will be integrated, including authentication system, core banking system and other internal and 3rd party systems
- Explain the standard deployment stack, as per the SOW provision, pre-requisites and dependencies
- Sizing requirements
- Pre-requisite for the deployment of Microservices (mandatory and solution ones)
- High-level Authentication requirements and the involvement of the 3rd party Authentication solution provider.
- Discuss and agree on the environment management strategy
- Review the Disaster Recovery (DR) plan
- Providing access to the implementation team to the Client' backend software anonymised development and/or test environments
- Identify and discuss any migration requirements i.e. identifying all systems impacted by the new solution and migrating them
- Discuss other requirements like Test Automation, User Accesses & Permissions, etc.
- Identify potential risks

#### Outputs

- System Architecture Document - Draft - Produced by the implementation Solution Architect/TC
- Draft Project Backlog

### 2.2.4. Experience Discover

This workstream is led by the project CX/TC.

Introduce Infinity CX design best practices to enhance Client understanding of the subject, then will analyse and provide commentary to the information provided by the Client, including – but not limited to – the following:

- Brand Standards
- Style Guide
- Interactive Guide (if applicable)
- Branding Assets, Logos, etc.
- Image Assets
- Typography Assets
- Links to existing T&C, Privacy Policy, Disclaimers
- Any existing user flows or customer journey maps including prototypes

#### Outputs

- UX Design Document - Produced by the implementation CX/UX/TC and signed off by the Client
- Draft Project Backlog

### **2.2.5. Project Management**

Based on the dependencies identified in the workshops, and the environment readiness, the P M will revise the project plan – updating the sprint activities, start and end dates, and sprint-level scope. The PM also revisits the resource plan and requests for additional resources, if needed. The PM submits the revised project plan for Client’s approval.

- Daily Stand-Up Calls are recommended

### **Environment availability**

During this stage the environment availability will be discussed and agreed upon.

The environment will be made available as “in scope” based on the signed-off SOW, such as:

- On premise

OR

- Cloud Environments as indicated in the Project Plan and following the Cloud Services release management stipulated in the Cloud Services Agreement.

Based on the above, Temenos will prepare the Temenos software packages required.

### **Outputs**

The PM will ensure that the following artefacts, the deliverables from the Discover workshops, are delivered, reviewed, approved and signed off by the Client:

- System Architecture Document
- UX Design Document
- Updated Project Backlog
- Updated Project Plan

Client activities:

- Business requirement documents (BRDs) for gaps identified - signed off by the implementation BC
- Non-Functional Requirements document - signed off by the implementation Solution Architect/TC
- Creating and providing high level User Stories (business transformation objectives), which will constitute the Project Backlog, which will be reviewed, amended and finalised at the Design Stage.
- Creation of Test Strategy and Test Plan.
- Complete sizing questionnaire

### **2.2.6. Environment Management**

#### **Managed environments**

Temenos Cloud Architecture team will review the Environments target architecture taking into account the signed-off SOW

Temenos CDM will prepare and set up the Client Software Environments for each of the developments in scope and used for the subsequent project stage(s)

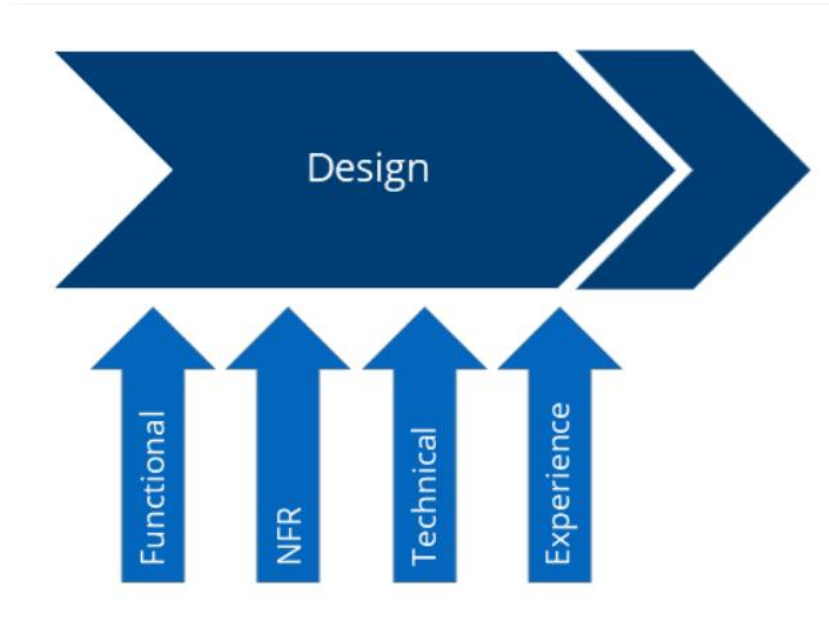
Temenos CDM will undertake management of the Temenos Environments it provides on a managed basis, including capacity and performance management of the environments

### Non-managed environments and on-premise

For environments not managed by Temenos, the implementing party will undertake deployment and other operational activities themselves

Temenos does not undertake Service and Change Requests in respect of such non-Temenos managed environments

### 2.3. Design



This Stage describes how the Design of an Infinity project implementation should be conducted. It describes the scope, roles & responsibilities, activities, inputs, outputs along with entry and exit criteria.

The Infinity project implementation team should use this stage while planning and executing the design phase.

During this phase the implementation team will work to translate the Client's requirements (from the Discover phase) into system and technical solution options that will then lead into the development phase of the project.

#### Inputs

The following artefacts are the inputs to the Design phase:

- Signed-off Client business requirements (either Business Requirements Documents (BRDs) or Jira User Stories)
- Signed-off UX Design Document
- System Architecture Document
- Project Backlog

#### Key Activities

Recommended Tools:

- Jira
- Confluence

A series of workshops will be scheduled and conducted by the implementation team to derive the final implementation solution from the point of view of functional, technical, experience, non-functional requirements. This will include the project backlog, technical design, specific UX design/prototype, API mapping and system configuration.

### **2.3.1. Functional Requirements Workshops**

The activities consist of:

- Translate the signed-off business requirements into Functional Requirements, documented as Functional Specifications Documents (FSDs) and present them to the Client for review and approval (where appropriate High level solution documents can be produced first).
- Update the base user stories and create new/updated user stories for the approved gaps
- Map data to Infinity Business objects
- Capture customer specific rules, to be configured in the solution
- Any standard user stories that need to be amended as part of the Client requirements elaboration workshops will have their estimate updated.
- Any new feature user stories identified as required will be estimated by the Infinity implementation team.
- Identify dependencies and their potential risks to the project timeline

The Base Product user stories are depicted in the Annexure.

#### **Outputs**

- Functional Specification Document(s) - Produced by the implementation BC/TC and signed off by the Client
- Updated Project Backlog

### **2.3.2. Non-Functional Requirements Workshops**

The activities consist of:

- Where required, produce design documents to describe amendments needed to cover any requirements raised in the signed-off Non-Functional Requirements and present them to the Client for review and approval.
- Identify dependencies and their potential risks to the project timeline

#### **Outputs**

- Technical Specification Document(s) - Produced by the implementation TC and signed off by the Client
- Updated Project Backlog

### **2.3.3. Technical Requirements Workshop/s**

The activities consist of:

- Review with the Client the sizing document received from the Temenos Sizing team
- Finalise review and sign off the System Architecture Document (infrastructure for Dev and Prod like environments)
- Finalise the environment management agreement with the Client
- Production of Integration Design Document in response to Client's signed-off Integration Requirements Document
- Authentication solution (SCA): there will be several workshops with this subject:

- Review the Authentication solution user journeys with the Client and sign-off (login, push-notifications, step-up, transaction verification, etc.)
- Discuss and decide the implementation and integration solution in coordinated with the 3rd party Authentication provider selected by the Client
- Integration requirements documents for : additional integration requirements, both, with internal and 3rd party systems
- Identify dependencies and their potential risks to the project timeline

### Outputs

- System Architecture Document - Produced by the implementation Solution Architect/TC and signed off by the Client
- Integration Design Document(s) - Produced by the implementation TC and signed off by the Client
- Updated Project Backlog

### 2.3.4. Customer Experience (UX/UI) Workshop/s

The Base Product prototype will be used for user stories visualisation process with the Client.

Recommended Tools:

- Xd
- InVision

The activities consist of:

- Using the Real-time Design & Prototyping approach, apply the Client's branding style guides to the base Infinity product; review it with the Client and get the sign off.
- Use the InVision Infinity Retail Banking base product to produce the custom design prototype (new screen designs or update base product screen design as per the outcome of the Functional Requirements workshop); a maximum of three (3) iteration cycles can be planned to drive the review, triage, amendment the Client review, make changes and sign-off.
- If required, adapt the solution to meet local language requirements (right-to-left, longer terms, etc.)

### Outputs

- UX/UI design prototype - Produced by the Implementation UX/UI/TC in collaboration with the Client
- Updated Project Backlog

### 2.3.5. Project Management

Once the Client's final requirements and the related solution are clarified, estimated and signed-off, the Infinity PM will update the Project Plan, ensuring all Actions, Issues and Risks are fully documented and shared appropriately.

In addition, the PM must ensure that the resourcing plan and any additional linked commercials are completed and updated. This may mean requesting additional resources, or adjusting timelines, as the Discover and Design stages drives additional clarity to the project.



## Environment management

### Managed environments

- Temenos CDM will review the Environments target architecture taking into account the non-functional requirements (NFRs).
- Temenos CDM will prepare and set up the Client Software Environments for each of development and testing environment in scope and used for the subsequent project stage(s).
- Temenos CDM will undertake management of the Temenos Environments it provides on a managed basis, including capacity and performance management of the environments.

### Non-managed environments and on-premise

- For environments not managed by Temenos, the implementing party will undertake deployment and other operational activities themselves.
- Temenos does not undertake Service and Change Requests in respect of such non-Temenos managed environments.

## Outputs

The PM will ensure that the following artefacts are delivered, reviewed, approved and signed off by the Client:

- Signed-off Functional Specifications Document(s)
- Signed-off UX/UI design prototype
- Signed-off System Architecture Document
- Signed-off Integration Design Document(s)
- Project Backlog for delivery
- Updated Project Plan

### 2.3.6. Environment Management

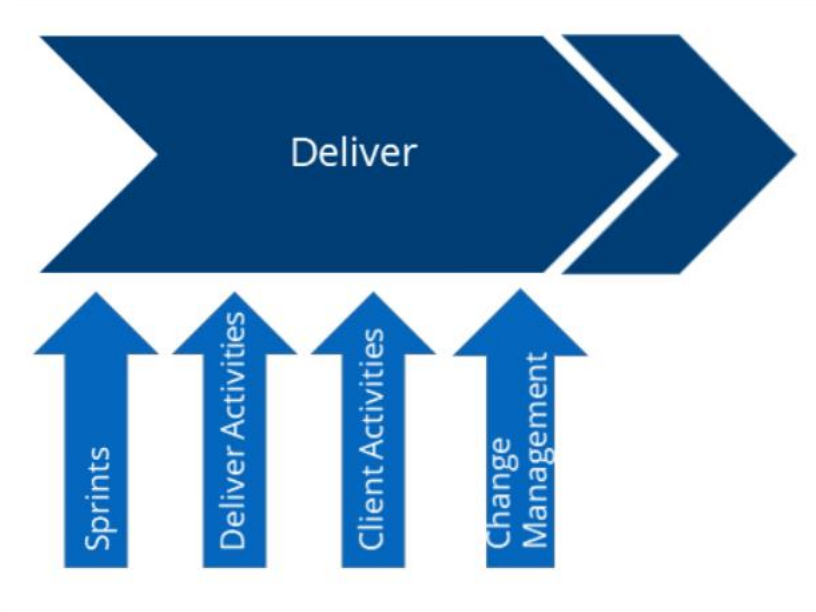
#### Managed environments

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- Temenos CDM will prepare and set up the Client Software Environments for each of development and testing environment in scope and used for the subsequent project stage(s)
- Temenos CDM will undertake management of the Temenos Environments it provides on a managed basis, including capacity and performance management of the environments

#### Non-managed environments and on-premise

- For environments not managed by Temenos, the implementing party will undertake deployment and other operational activities themselves

## 2.4. Deliver



The overall objective of the TIM for Infinity 'Deliver' stage is to undertake iterative functional development/configuration sprints to deliver the defined Client solution.

### Inputs

Key Inputs to this Stage:

- Signed-off System Architecture Document
- Signed-off UX/UI design prototype
- Signed-off System Design Document
- Signed-off Functional Specification Documents
- Signed-off Integration Design Documents
- Project Backlog for Delivery
- Updated Project Plan

### 2.4.1. Sprints

#### 2.4.1.1. Sprint 0

Sprint 0 is a maximum 5 days period for the Infinity project implementation team to get clarity and assurance that all is in place to be able to deliver the final Client solution activities during this phase include:

- General Team Briefing
  - Ensure all team members (both core and development support) are full briefed on project objectives, work effort, milestones, roles, tasks and assignments etc. by the PM and Solution Architect.
- Solution Design Overview (including NFRs)
- User Story Readiness
  - All technical, CX/UX related and NFRs for delivery are reviewed by the team, estimates checked and added to relevant sprints as required
  - The Solution Architect and Technical Lead will check with the Client technical/IT team if the environments have been provisioned timely working with the Temenos CDM.

- Environments:
  - Based on the deployment choice (see SOW) the Client has to ensure relevant environments are in place:
    - On Premise
      - Setting up Environment target architecture
      - Setting up the hardware and software infrastructure so that delivery of the System Scope can be done in agile mode and that the implementation team can provide the agreed support.
    - Cloud
      - Cooperating with Temenos CDM in the setup of the Cloud Environments in the scope of the project.
  - If the environment provisioning is not done in a timely manner, the first functional Sprint cannot be started. This will lead to significant challenges if the Infinity delivery team is already allocated.

#### **2.4.1.2. Subsequent Sprints (based on output from Discover and Design phase)**

- Configuration/parameterization, for example user management, user language, configuration for Microservices, Authentication solution
- Third Party integration

#### **2.4.2. Deliver Activities**

- Sprint Planning
  - On agreement of the final solution design at the end of the Design stage, the initial sprint planning will form part of the Project Plan shared with and approved by the Client.
- Daily Stand-Up Calls (Internal/external)
  - Daily internal calls for the Infinity project team to track individual task progression, confirm priorities and targets for the day and to identify and remove blockers. Optional daily external calls with Client delivery team to track progress/issues/change.
- Backlog Refinement and Management
  - The project backlog is reviewed and refined (prioritised/ re-prioritised) on a weekly basis by the Client Product Owner, PM with the Infinity delivery team, to ensure the next 2 sprints worth of work is always correct, defined and prioritised.
  - By agreement, the Client may move already-planned User Stories that have not yet been developed from one future sprint to another. Any additions to the original project backlog that formed the original scope will be managed by the formal Change Management process.
- Ensuring a level of quality assurance of the Unit Testing against the specific Acceptance Criteria of each User Story delivered by the Client to the implementation team.
  - Sprint Demonstrations, when possible.
  - For each Software package released to the Client for testing, the Infinity project team will deliver a detailed demonstration of User Stories to be delivered.
- Train the trainer sessions where applicable
- Preparing the Deployment plan with the Client, this will be executed at Deploy Stage.
- Providing CI/CD framework and deployment run books, when applicable
  - Integrating the Software with Client's backend systems, which includes configuring Client APIs/web services in Temenos systems.

### **2.4.3. Client Activities**

The Client shall be ready to commence System Integration Testing (SIT) upon completion of Unit Testing and availability of the relevant Build that is to be tested.

Standard project resourcing for Infinity implementations allows for a certain portion (in man days) of delivery team velocity per sprint to review and remediate this initial SIT feedback from the Client in parallel to the remainder of the functional delivery sprints. If this is agreed pre-project it will be included in the SOW, otherwise it will be an output of the review of the Client's Test Strategy.

#### **Other activities:**

- Organising and executing SIT
- Preparing with the implementation team, the Deployment plan, which will be executed at Deploy Stage.
- Documenting the Testing procedure and results.
- Providing approval to transition to the next sprint, SIT or UAT.
- Responding to all relevant queries from the implementation team (Onsite or Offsite).

### **2.4.4. Change Management**

Change is managed in several different ways in an Infinity implementation depending on the level, size and complexity.

#### **User Story Change**

This relates to Small Scale Changes only, larger changes are covered by the Change Management process.

Adding new User Stories for estimation and delivery mid-project is allowed only if the Client replaces a de-scoped User Story of a same or similar estimate. The User Story removed will be moved back to the bottom of the project backlog (for example in JIRA) to be re-planned in a future phase of the engagement, if need be, but not within that current project.

The Infinity PM has the final word on whether the change in story can be safely accommodated in the current project delivery sprint plan and highlight any dependencies, issues, risks associated with the change.

If the change to the requirements is more significant than single User Stories, then the below process will need to be followed. Also, if the new User Story and the replaced User Story in the opinion of the Client need to be delivered in the current project then again, the below process needs to be followed.

#### **Change in project scope/ requirement**

Any Change Requests shall be made in writing by either Party.

The implementation team shall be responsible for providing an impact analysis within a timescale that is defined in the Change Management Plan, considering the extent of available time without disrupting the Project Plan. The analysis will include (but is not limited to) any impacts on:

- SOW
- Project Plan (including delivery dates/due dates)
- Acceptance Criteria and Testing criteria
- Project resource requirements
- Training

- Changes to any documentation
- Any other matter reasonably requested by the Client at the time of the request or reasonably considered by the Infinity PM to be relevant
- Costs associated with the proposed change
- Data Migration factors (if any) implicated in the change
- Whether any Personal Data will be processed by the implementation team for and on behalf of the Client

Changes to the lists or delivery dates, will have to be agreed by both Parties based on various elements such as capacities, Dependencies, and the commercial/financial impact on the Software Agreement and/or the Service Agreement.

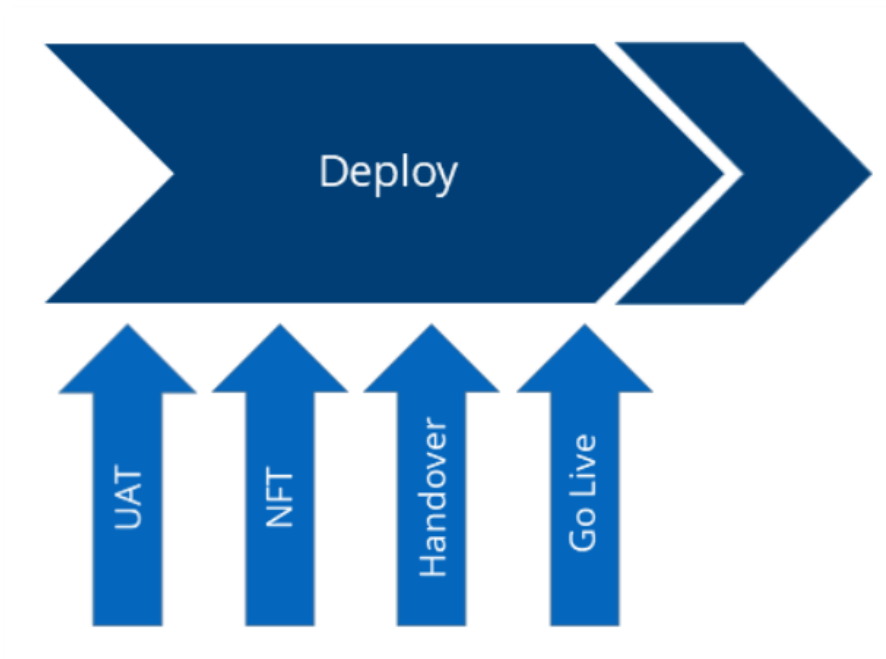
Any increase in the budget or any change that cannot be performed within the currently committed resource structure will have to be processed through the formal Change Request Process.

### Outputs

The key outputs of this stage include:

- Planned sprint deliverables/ increments
- Sprint reports
- SIT signed-off
- Release notes
- Relevant binaries (IPA, APK) - native apps, web archives, APIs
- Deployment runbook

## 2.5. Deploy



Deployment involves the planning and execution of the system in the production environment following the Client's deployment strategy, which is developed during the course of the project.

It is critical that all components are deployed in the correct sequence and following the scripts and/or runbooks as available. The deployment itself must be planned and several Dress Rehearsals are performed to ensure that the deployment plan is realistic and that the timings are accurate.

The overall objective of the Infinity implementation 'Deploy' stage is to support the Client in taking the completed deliverables through their testing and on to production ready state, including the promotion to live.

## **Inputs**

Key Inputs to this Stage:

- Planned sprint deliverables/ increments
- Release notes
- Signed off SIT
- Relevant binaries (IPA, APK) - native apps
- Deployment runbook

## **2.6. User Acceptance Testing (UAT)**

**Implementing party activities:**

- Provide support for UAT
- Fixing Software Issues or assisting the Client with the process for fixing Software Issues that relate solely to the Software
- Consultative assistance to the Client for the relevant Testing process using the available time of relevant members of the implementation team.

**Client activities:**

- Organising and executing UAT activities and any other testing identified
- For on-premise (or Client cloud) deployments
  - Ensuring that the Client Environment for Testing is available and stable
  - Client will, with support from the implementation team, perform Non-Functional Testing, including performance and penetration testing, which cannot be done by the implementation team due to lack of correct environments, etc.
  - We recommend that the Client engages expert assistance with penetration testing, including utilising the knowledge and experience of the contracted third-party authentication experts.
- Once the exit criteria for the relevant Testing process have been met, the Client must Sign-off that the Testing process has been completed and the System Scope is ready for Deployment.
- If the exit criteria have not been met, then the Client must raise Software Issues with the project implementation team.

## **2.7. Non Functional Testing (NFT)**

**For On Premise Deployments**

**Implementing party activities:**

- Provide support for NFT
- Fixing Software Issues or assisting the Client with the process for fixing Software Issues that relate solely to the Software

- Consultative assistance to the Client for the relevant Testing process using the available time of relevant members of the implementation team.

#### **Client activities:**

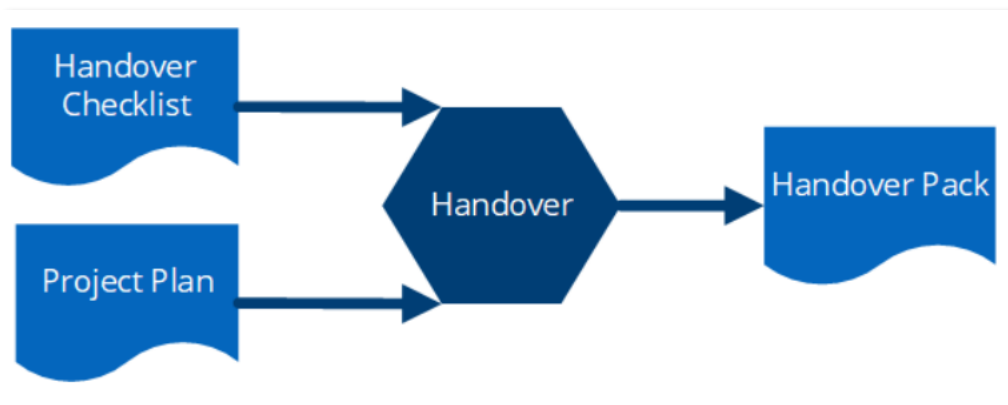
- Non-Functional Testing of documented Non-Functional Requirements
- We recommend that the minimum Non-Functional Testing that needs to take place is
  - Penetration testing
  - Disaster Recovery testing
  - Performance / Load / Stress testing
- All test results by the project need to be signed off by the Client.
- Once the exit criteria for the relevant Testing process have been met, the Client must Sign-off that the Testing process has been completed and the System Scope is ready for Deployment.
- If the exit criteria have not been met, then the Client must raise Software Issues with the project implementation team.

#### **For Temenos Cloud Deployments**

##### **Implementing party activities:**

- Non-Functional Testing of documented Non-Functional Requirements
- Fixing Software Issues or assisting the Client with the process for fixing Software Issues that relate solely to the Software
- All test results by the project need to be signed off by the Client.
- Once the exit criteria for the relevant Testing process have been met, the Client must Sign-off that the Testing process has been completed and the System Scope is ready for Deployment.
- If the exit criteria have not been met, then the Client must raise Software Issues with the project implementation team.

## **2.8. Handover to Support**



#### **Overview**

The project handover encompasses a series of procedures that ensures that the project has accomplished its objectives from a services delivery standpoint and can ultimately be considered completed.

It is essential to ensure that all project activities have been delivered, documented and signed off by the relevant parties.

From an implementation perspective, it provides a formal mechanism to handover responsibility both to the Client and the support and account management functions.

The PM will ensure that the Project Handover Pack includes a detailed list of L3 Developments and a clear statement regarding whether or not Temenos is responsible for maintenance of these developments.

All of the activities listed below are the responsibility of the Infinity PM.

### **Prepare Plan for Project Closeout**

Conduct meetings with support managers to define handover steps and review the outstanding issues.

Create Application Handover checklist. Ensure that all L3 Developments are listed along with a clear statement on who will support these developments.

Update project plan in conjunction with the Client's project manager and support managers to confirm dates and activities for project handover.

Update Application Handover Checklist.

Ensure Product Support readiness in terms of skill set/capability review to ensure that Product Support is able to support what is being handed over to them.

### **Finalise Project Documentation**

Ensure that the following project management documentation is up to date and available to the relevant stakeholders both internal and external:

- Contract / SOW
- Project Plan
- Project Dashboards
- Weekly/monthly status reports and any meeting minutes
- Application handover checklist

Ensure all the above are loaded in the project SharePoint database.

### **Complete Ownership Transition**

Ensure the sign-off of all relevant documentation by the responsible parties.

- Milestone Acceptance Certificate
- Client Application Handover checklist
- Support Handover checklist

## **2.9. Go Live**

### **Temenos Cloud**

2-3 weeks ahead of go-live for Temenos Cloud implementations:

- Presentation of the ORB checklist; for each deliverable, presentation of results of signoffs (Infinity PM) and commitments to complete outstanding actions (ASM of the project for Temenos primed projects and Infinity PM for partner primed projects)
- Confirmation of the signoffs and commitments (Chair of ORB)
- Actions and Decision



- Ensure that the completed and reviewed Deployment Runbook is handed to the Cloud Delivery Team

The ORB Checklist, which must be completed, reviewed and signed off in order to gain approval for go-live, can be found [here](#).

### **On-premise (or Client cloud)**

#### **Implementing party (either Temenos or partner) activities:**

- Ensure that the completed and reviewed Deployment Runbook is handed to the Client
- Providing consultative assistance to the Client for the Deployments using the available time of relevant members of the project team.
- Delivering the approved System Scope and providing support during Go-live.

#### **Client activities:**

- Deploy System Scope
- Sign off Go-live

### **Outputs**

The key outputs of this stage include:

- Client Sign Off of UAT Milestone Acceptance Certificate
- Operational readiness
- Deployment runbook executed and completed
- Final Infinity project-specific Code delivered
- Client Sign Off of Go-Live Milestone Acceptance Certificate