Delivery Project Initialization

Internal Project Scheduling and Internal Ops

DocumentID: DELIVERY-PROJECT-INITIALIZATION

# Assumptions Before Starting

* Previous Workflow process has been completed and we have a signed SOW.
* Finance team has entered the project gantt into RUNN with placeholders.

# Process Overview

This document outlines the steps to be taken after a contract is signed, leading up to the project kickoff. It covers scheduling, team assignment, project tracking setup, and communication channels establishment.

## Set up JIRA Steering Board to Track These activities

* 1. Description: Committee to manage the project from start to finish (this is the starting point of which to craft the plan for the client following the 80/20 rule for process).
  2. Responsible Department: Product Manager

## Project Documentation Setup (Automation Potential)

* 1. Description: Establish a centralized repository for all project documentation to ensure accessibility and organization.
  2. Responsible Department: Product Manager & IT
  3. [Documentation Setup Guidelines](https://docs.google.com/document/d/19irk3W0ksmeIvuSN7MK-c7grWreIp_-ditxShlum-1I/edit?usp=drive_link)

## Project Scheduling with the Department Leads.

* 1. Description: Determine the product timeline, including milestones, deadlines, and deliverables. Assign Tentative Team.
  2. Responsible Department: Department Head
  3. [Project Scheduling](https://docs.google.com/document/d/1yPyxxh_UKFd82jEPhKcUctxstBC4Q3olnxsKyzpqFug/edit)

## Team Confirmation / RUNN Setup (AI / Automation Potential)

* 1. Description: Confirm project team members based on skill sets, availability, and project requirements. ToDo - pre-work to sent client onboarding for engineers.
  2. Responsible Department: PM + Eng Anchor
  3. [RUNN Project Setup / Configuration](https://docs.google.com/document/d/1STf8AVOxMmrCkyykKZpMhh_PWpiW0u2fuoNa_aChNy4/edit)  
     [Video Guide - Budgets / Time Tracking](https://drive.google.com/file/d/1FM-IrI-Zmq4zB8hm8fMcRleGBDJ58tL4/view?usp=sharing)

## SRED Setup

* 1. Description: If this project will be tracked for a SRED claim, ensure the tags are configured in RUNN correctly.
  2. Responsible Department: PM
  3. [SRED Tagging Guide](https://docs.google.com/document/u/0/d/18CIBtE8OlrlbolV38US9Y16Ox8QxAwpOA5vdhEu7lbE/edit)

## Project Setup in JIRA (Automation Potential)

* 1. Description: Create the project in the chosen project tracking software, outlining tasks, milestones, and assigning roles.
  2. Responsible Department: PM
  3. [Project Tracking Setup](https://docs.google.com/document/u/0/d/156DiyyVsM-7HFt6DWFFpM2kUpuOfKH6ScF5EuiNJEYc/edit)
  4. [Video Guide](https://drive.google.com/file/d/19UFpjvNOlye58Rrw-cOE5esnw2DPKf-p/view?usp=drive_link)

## Communication Plan Establishment (Automation Potential)

* 1. Description: Develop a communication plan that outlines how project information is shared between team members and stakeholders.
  2. Responsible Department: Product Manager
  3. [Communication Plan](https://docs.google.com/document/d/1YeC-oAKIkF0Q1qVcPLkzAOAcOnvfInpylYd6F35lzOg/edit?usp=sharing)

## Creation of Slack Channels (Automation Potential)

* 1. Description: Set up dedicated Slack channels for the project to facilitate real-time communication among team members.
  2. Responsible Department: IT & Product Manager
  3. [Slack Channel Setup Instructions](https://docs.google.com/document/u/0/d/1yHOdRsodoEZeI06mxkX6BjuAJJTJxFI9turVynNjgw0/edit)

## Distribution List Creation (Automation Potential)

* 1. Description: Create email distribution lists for the project to streamline communication with the team and stakeholders.
  2. Responsible Department: IT & Product Manager
  3. [Distribution List Creation Guide](https://docs.google.com/document/d/1P6WMM3JtaXqhKLG-KOj0__mOSFpJqa_qQ0T_H3A3vDI/edit?usp=drive_link)

## Resource Management

* 1. Description: Outline a strategy for managing project resources effectively, including human resources, tools, and technologies, create the vacation schedule etc
  2. Responsible Department: Product Manager
  3. [Resource Management Guidelines](https://docs.google.com/document/d/1BL92OV6KR_GFxMq0VL5bcfL8IyEu7_2VJa0j8QoOwtI/edit?usp=drive_link)

## Risk Management Plan

* 1. Description: Develop a plan to identify, analyze, and manage project risks.
  2. Responsible Department: Product Manager and Anchor
  3. [DPI-RISK-ASSESSMENT](https://docs.google.com/document/d/1gb3pTYzVdFT23wGxcFsdyAPk4oWMvs1k7IPYJ8mrLcc/edit?usp=drive_link)

## Send final communication to all internal team members

* 1. Description: After all initialization is done for the project, you will need to notify all members involved with essential project details.
  2. Responsible Department: Product Manager
  3. Final Communication Guide

# Next Phases:

* [Kickoff / Inception](https://docs.google.com/document/d/1gVfoxbGcWnC8iXfdpo4qu5uH5YJhvr6I1jxvtOFTu8Y/edit?usp=drive_link)