Delivery Project Onboarding

Conduct a successful onboarding before engineering kicks things off

DocumentID: DELIVERY-PROJECT-ONBOARDING

This document outlines the high-level process for conducting a successful project onboarding. Detailed steps, department-specific tasks, and resources are linked throughout this document for ease of access and update. All the onboarding related documents can be found [here](https://drive.google.com/drive/folders/1by6jjiqOSFfTVBsp8ThiP5Uy-GxbN7_b?usp=drive_link)

# Assumptions Before Starting

* [Project initialization phase](https://docs.google.com/document/d/1rHvj_8GaIOk3Og950BxdJec5balWEbN88gRv6HWBWPk/edit#heading=h.cce8qcw74kph) has been fully completed

# Suggested Reading

* Please make sure you understand the importance of Project inception meeting and why it should be conducted. [This deck covers this topic](https://docs.google.com/presentation/d/1MNKYmRwBALrWnNxgR7ibCXeTIBjLXj7PbEFQPVqduv8/edit?usp=drive_link)

# Process Overview

# Are 3rd party vendors involved?

1. Description: There may be situations where we have to work with 3rd party companies which the client has selected as additional partners. Based on our experience, we want to ensure that we establish the right working norms with the partners
2. Responsible Department: Product Manager & TS leadership
3. Here is a guideline on [working norms with 3rd party vendors](https://docs.google.com/document/d/1YMQOkFVvFU47xYgpUWKY8mTZ8GywXZKy1C-t94cD2vE/edit). We must ensure that if there are gaps, then those are addressed during the discovery/inception phase.

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## Set up the meeting with the client

1. Description: Set up the meeting with the client
2. Responsible Department: Product Manager (support from sales if needed)
3. Send an email to the client inviting them to the kickoff meeting and finalise date and time using [this email template](https://docs.google.com/document/d/1vpTltHNeNzRfpVoGWB5-3SJPaPXv_xJ6IqDDm-EIqus/edit)
4. Once date and time is finalised, send a calendar invite for the inception meeting to all key personnel.
   1. Ensure that the entire product team (PM, engineering, design, any leadership folks, QA) from TS are available for the meeting.
   2. Ensure that the key stakeholders from the client side are available for the meeting.

## Prepare for Project inception meeting

* 1. Description: Prepare for conducting the Project kickoff meeting which is critical in starting off the project.
  2. Responsible Department: Product Manager
  3. [Checklist for Project inception preparation](https://docs.google.com/document/d/1xDXXv0Ghz1NAmBXRRgSR2VR1SfARdUG1DVeDZjr77Tc/edit)

## Conduct the Project inception meeting

* 1. Description: Conduct the meeting with all the key stakeholders to bring everyone on the same page and ensure there is no gap from scoping discussions.
  2. Responsible Department: Product Manager with input from team members
  3. [Template of the deck](https://docs.google.com/presentation/d/1neQiOdMpdCR_4tKgRZwm6oxwWN1Gzdhub_UkWA7WOUA/edit?usp=drive_link) for the meeting

## Follow up on the Project inception meeting

* 1. Description: Once the meeting is complete, update any information as needed and send out communication on key points from the meeting
  2. Responsible Department: Product Manager
  3. [Checklist of the follow up action items](https://docs.google.com/document/d/1PKDFx73rsS6OJZKhH9gryDzUqsjc-FxxreMYS1ViiSA/edit)

## Are we conducting a discovery phase?

* If No, then after inception, we will go straight into delivery phase
* If yes, we go into the discovery phase and at the end of the discovery, we conduct another inception as explained [in this deck](https://docs.google.com/presentation/d/1MNKYmRwBALrWnNxgR7ibCXeTIBjLXj7PbEFQPVqduv8/edit?usp=drive_link)