

Task: Design and Implement an Incremental SDLC Project Structure in ClickUp for a CRM System

Duration: Approximately 50–60 minutes

Objective: Build a detailed and organized project structure in ClickUp that follows the Incremental SDLC Model. You will simulate the development of a CRM system by breaking it into increments, each delivering a functional component (e.g., customer profile management, sales tracking). The task focuses on setting up increments, managing dependencies, and ensuring iterative development within each increment, all while leveraging ClickUp's features for task management and collaboration.

Step-by-Step Instructions

1. Create a Workspace Structure (5 minutes)

Action: Log into ClickUp and access your workspace.

Setup:

- Create a new Space named "CRM Incremental Project."
- Inside this space, add a List named "Project Management" for overarching tasks (e.g., vision, risk management).
- Add separate Lists for each increment:
 - "Increment 1: Customer Profile Management"
 - "Increment 2: Sales Tracking"
 - "Increment 3: Customer Interaction Logging"
 - "Increment 4: Reporting Dashboard"
- Optionally, create a Doc named "Project Artifacts" to store deliverables like requirements and design documents.

Purpose: Provides a clear structure where each increment is treated as a mini-project, aligning with the Incremental model's approach to delivering functional parts of the system sequentially.

2. Define the Project Vision (5 minutes)

Action: In the "Project Management" list, create a task titled "Develop Project Vision."

Details:

- Description: "Define the scope and purpose of a CRM system to manage customer interactions, track sales, and improve customer satisfaction."
- Subtasks:
 - Identify stakeholders (e.g., sales team, customer support).
 - Outline high-level goals (e.g., improve sales efficiency).
- Attachments: Use ClickUp's Docs feature to draft a simple Vision Document (e.g., a one-paragraph summary).

Purpose: Establishes the overall project scope and objectives, which guide the development of each increment.

3. Set Up Increment Tasks (15 minutes)

Action: In each increment list (e.g., "Increment 1: Customer Profile Management"), create tasks for the following activities:

- "Requirements Gathering"
- "Design"
- "Implementation"
- "Testing"
- "Deployment"

Details:

- For the "Implementation" task, add subtasks to represent iterative development cycles (e.g., "Iteration 1: Basic Profile Creation," "Iteration 2: Profile Editing").
- Use checklists within tasks for detailed steps (e.g., under "Requirements Gathering," add "Interview stakeholders," "Document functional requirements").
- Set dependencies where necessary (e.g., "Increment 2: Sales Tracking" depends on "Increment 1: Customer Profile Management" being completed).

Notes:

- Each increment should be self-contained but build upon previous increments.
- Use ClickUp's relationships feature to link related tasks across increments if needed.

Purpose: Structures each increment with its own development lifecycle, reflecting the Incremental model's focus on delivering functional components iteratively.

4. Manage Risks (5 minutes)

Action: In the "Project Management" list, create a task titled "Risk Management Plan."

Details:

- Description: "Identify and mitigate risks for CRM development."
- Subtasks:
 - List risks (e.g., "Dependencies between increments may cause delays").
 - Define mitigation strategies (e.g., "Ensure clear interfaces between increments").
- Custom Fields: Add "Risk Level" (High, Medium, Low) and assign values.
- Create a recurring task, "Risk Review," scheduled every two weeks.

Purpose: Proactively addresses risks associated with the incremental approach, such as integration challenges or scope creep.

5. Create Key Artifacts (10 minutes)

Action: In the "Project Artifacts" Doc (or directly within tasks), manage essential deliverables:

- Requirements Specification: Create a task in the "Project Management" list, linked to each increment's requirements task.
- Design Document: Attach design diagrams or descriptions to the "Design" task in each increment.
- Test Plan: Create a task in each increment's list for defining and executing tests.
- Deployment Checklist: Attach a checklist to the "Deployment" task in each increment.

Details:

- Use ClickUp's Docs for centralized storage or attach files directly to relevant tasks.

- Example: For "Increment 1: Customer Profile Management," attach a requirements document to the "Requirements Gathering" task.

Purpose: Ensures that necessary documentation is produced for each increment, supporting the development and integration process.

6. Simulate Stakeholder Collaboration (5 minutes)

Action: In the "Project Management" list, create a task for each increment: "Stakeholder Review for Increment X."

Details:

- Description: "Present the completed increment to stakeholders and gather feedback."
- Comments: Use ClickUp's comment feature to simulate feedback (e.g., "Add validation for customer email format").
- Set the due date to the end of each increment's deployment.

Purpose: Incorporates stakeholder feedback after each increment, ensuring that the delivered functionality meets user needs and expectations.

7. Enhance with Custom Fields and Views (10 minutes)

Action: Add custom fields and configure views in the "CRM Incremental Project" space:

- Custom Fields:

- "Increment Progress" (Dropdown: Not Started, In Progress, Completed).
- "Priority" (High, Medium, Low).

- Views:

- Gantt View: Display timelines and dependencies between increments.
- Board View: Organize tasks within each increment by status (e.g., To Do, In Progress, Done).
- List View: Filter by "Priority" or "Increment Progress" for task management.

Purpose: Leverages ClickUp's tools to track and visualize the progress of each increment, aligning with the Incremental model's management needs.

8. Finalize with Deployment and Closure (5 minutes)

Action: Ensure each increment list has a "Deployment" task.

Details:

- Subtasks:

- Conduct integration testing with previous increments.
- Deploy the increment to the production environment.
- Update user documentation.
- Hold a brief retrospective for the increment.

- Dependencies: Set the "Deployment" task to depend on the completion of "Testing" within the same increment.

Notes: Since each increment is delivered separately, deployment occurs multiple times throughout the project.

Purpose: Completes each increment with a structured deployment process, ensuring that the system is functional and integrated with previous increments.

Outcome

Upon completion, you will have a fully operational Incremental SDLC project structure in ClickUp for a CRM system, featuring:

- A Space ("CRM Incremental Project") with lists for "Project Management" and each increment (e.g., "Increment 1: Customer Profile Management").
- Increment tasks covering requirements, design, implementation, testing, and deployment, with iterative subtasks where applicable.
- A risk management plan with periodic reviews to address risks associated with incremental development.
- Artifacts (e.g., requirements, design documents) linked to each increment.
- Stakeholder review tasks for each increment, with simulated feedback.
- Custom fields and views for tracking progress and visualizing dependencies.
- Deployment tasks for each increment, ensuring functional delivery throughout the project.

This setup mirrors real-world Incremental SDLC practices, emphasizing the delivery of functional components in stages and providing a practical learning experience within a 50–60 minute timeframe.

Time Breakdown

- Step 1: 5 minutes
 - Step 2: 5 minutes
 - Step 3: 15 minutes
 - Step 4: 5 minutes
 - Step 5: 10 minutes
 - Step 6: 5 minutes
 - Step 7: 10 minutes
 - Step 8: 5 minutes
- Total: 60 minutes