

Phase 1

Technical Assessment & Development Planning

Duration: ~3 months (about 12 weeks)

Hours: Max 100 hours/month

Goal

To properly understand the current FileMaker setup, check how ready it is for the 3P3 methodology, and produce a clear roadmap that smoothly sets us up for Phase 2.

How We Plan to Handle Phase 1

Week 1 – Kickoff & Familiarization

1. Kickoff call to align expectations and confirm access to the system.
2. Collect all available documentation and notes.
3. Start reviewing Muhammad's FileMaker files: tables, relationships, and scripts, to get a full picture of how things are built.

Week 2 – Deep System Scan & Early Observations

1. Continue the review in detail, checking layouts, workflows, and logic.
2. Identify obvious gaps, performance issues, and reusable components.
3. Share a short **Initial Assessment Summary** with you so we're aligned early.
4. Hold our **two-week checkpoint** with you to confirm we're fully aligned before moving deeper.

Week 3–4 – Technical Assessment & Process Mapping

1. Start the full technical assessment of the current solution.
2. Map the system against the **116+ processes** in the Process List.
3. Document missing pieces and areas that will need redesigning.
4. While doing this, we'll start sketching ideas for **optimized database architecture**.

Week 5–6 – Draft Technical Assessment & Early Roadmap

1. Prepare the **Technical Assessment Report & Gap Analysis (Draft)**.
2. Begin putting together the **Phase 2 Roadmap** alongside the assessment.
3. End of Week 6, share a **progress update** so we stay on the same page.

Week 7–8 – Architecture & Roadmap Consolidation

1. Finalize the optimized database architecture and proposed navigation flow for a process-driven system.
2. Expand the **Phase 2 Development Roadmap** with the following:
 - Milestones
 - Modules
 - Effort estimates
3. **Deliverable:** Draft Phase 2 Roadmap & Architecture Proposal by Week 8.

Week 9–10 – Refinement & Quick Wins

1. Refine **all** documentation and tighten the roadmap based on what we've learned.
2. Identify all necessary **safe optimizations** that prepare the system for **Phase 2** without starting development.
3. Prepare the **Phase 2 Preparation Checklist**.

Week 11–12 – Finalization & Phase 2 Prep

1. Apply your feedback and finalize all documents.
2. Deliver the **Final Phase 1 Package**, including the following:
 - Assessment
 - Roadmap
 - Prep Plan.
3. Confirm next steps and timing for Phase 2.

Key Deliverables

1. Initial Assessment Summary – Week 2
2. Technical Assessment Report & Gap Analysis (Draft) – Week 6
3. Phase 2 Roadmap & Architecture Proposal (Draft) – Week 8
4. Final Documentation & Phase 2 Package – Week 12