FAST DEPLOYMENT METHODOLOGY

CITSmart®

Connecting processes. Delivering experiences.

Summary

1. PRESENTATION

In order to build a network of partners that effectively have the standardized technical conditions and know-how to deploy our platform with agility, quality and focus on the desired results, CITSmart Corporation has developed this deployment methodology called FDM - Fast Deployment Methodology, which main objective is to provide the necessary steps to deploy the CITSmart products according to the processes of the clients, within the standards of efficiency, quality and agile and empirical form.

For the development of this methodology, it was used organizational change management approaches, orchestrated to a communication strategy and progressive management practices, to ensure not only the speed of deployment, but also the effectiveness of the project, reaching the desired objectives with quality and effective risk management.

CITSmart Corporation is aligned with the best practices and effectively monitors market developments by incorporating them into its platform to enable our partners and clients to achieve digital transformation goals by increasing agility and compliance in the processes that support the services of our clients.

In the design of the operational model and relationships with partners, we articulate several VERISM practices that are extremely effective in linking various perspectives and frameworks widely accepted in the market, such as ITIL, SIAM, Lean, DevOps, Continuous Delivery.

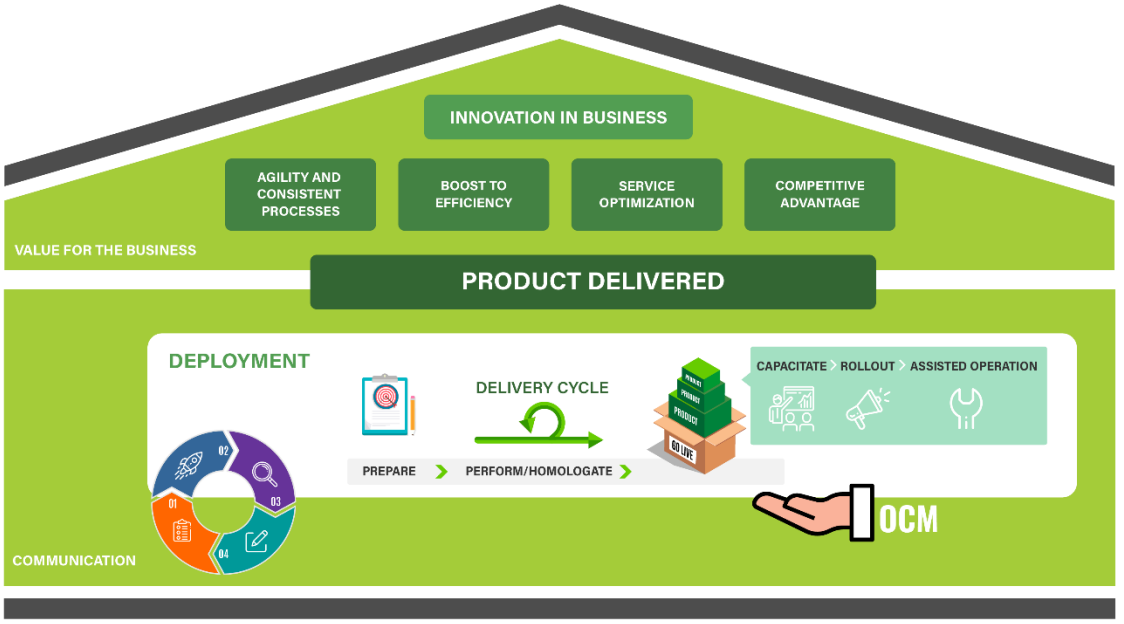
The main objective of this methodology is to deliver value and guarantee the success of our clients. So, let's DELIVER VALUE!

1.1 Agile Mindset

The business world is increasingly dependent on information technology, especially interactions with software. Delivering products and solutions continuously is no longer a necessity, it is a standard. Competitiveness in the business world drives companies to disappear overnight, simply wiping out business models that have been around for decades. What separates the best and the worst? What separates winners and losers? Our response is the ability to adapt to client's needs. Those who can do this quickly, come out ahead.

Moreover, this methodology does not only cover software, but also focuses on business. It is to be able to align the needs of our clients in the right time and put them in the best possible strategic position.

1.2 FDM structure



FDM is organized to work on a flexible model, where different teams can execute their work using various management structures and standards, while maintaining synchronization with the client's objectives.

The steps used in the FDM are detailed below, sorted according to the sequence given below, in order to enable better results:

- Organizational Change Management
- Communication
- Deployment Project

The document models used, and artifacts generated in the application of the methodology, are extremely important for the traceability and measurement of the results achieved with its usage. These documents will be constantly analyzed in order to maintain the continuous improvement and, consequently, the evolution of this methodology, always aiming at the success of the deployment and client satisfaction.

- Communication Matrix
- Communication Plan
- Organizational Change Plan
- Workbook – Technical Discovery
- Project Plan (scope, risks, restrictions and schedule)
- Test Script
- Acceptance Term
- Methodology Checklist

- Lessons Learned
- Term of project closure template
- Kickoff meeting template
- Meeting registration template
- Status Report Template
- Request for change template

2. ROLES

For the correct application, monitoring, measurement and evolution of the processes addressed by this methodology, it is necessary to define the roles that will enable the best results.

Here it is not defined the positions, but a set of responsibilities that can be performed by a single employee, by a group, or an employee can accumulate more than one role, regardless of their current occupation in the hierarchical structure of the company.

Each role is important for the full operation of the methodology. Below, the necessary responsibilities are described:

2.1 Facilitator

- Ensure that the team respects and follows the processes of the FDM methodology, obtaining the best performance, always respecting the particularities of the clients.
- Train and guide the other roles on the methodology and assist the stakeholders involved in the process.
- Be flexible enough to identify and remove barriers, including between the deployment team and the project manager, which obstruct progress, proposing improvements in the methodology.
- Maintain the methodology Checklist and lessons learned from each project.
- Keep team progress information visible to everyone in a clear and organized way.
- Encourage and facilitate decision-making and problem-solving skills related to communication, organizational change and deployment so staff can work more efficiently without the need for constant supervision (self-organizing team).

2.2 Project manager

- Maintain communication and good relationship with clients.
- Promote and monitor Organizational Change (OCM).
- To pass on to the team the knowledge of the business, through the requirements raised in order of priority.
- In conjunction with the team, define, document and determine the order of execution of technical requirements.
- Define the schedule for release of deliveries and validate them in relation to the characteristics and quality required for implementation.
- Receive customer feedback on each delivery cycle, prioritize and manage the necessary corrections and adjustments.

- Maintain the project documentation, according to the specifications of item **7 Artifact and models** and the specificities of each client.
- Create a common understanding of the project objective and maintain transparency throughout the project.
- Maintain a good relationship with the implementation team and among its members.
- Be clear, organized, concise and transparent.

2.3 Deployment team

- Be formed by collaborators with different specialties, according to the need of each project delivery cycle (examples: CITSmart Analyst, CITSmart Developer, CITSmart Administrator, CITSmart Architect). A multidisciplinary team is desirable.
- Be committed to delivering the work of each delivery cycle completely. No full-time allocation is required, but when allocated, there must be commitment.
- Be self-organizing and collaborative, dispensing constant supervision.
- Follow the methodology processes and priorities defined by the project manager.
- Be open to unavoidable changes that can contribute to the product development.
- Avoid changing the composition of the members after starting the project.
- Do not establish a membership. The team may be small enough to stay agile and great enough to deliver value.
- Maintain good relationships between members and other roles.

3. ORGANIZATIONAL CHANGE MANAGEMENT

Organizational Change Management (OCM) is a structure created and used to manage the effect of new business processes, changes in organizational structure or cultural changes within an organization.

Changes take time to be absorbed. So, stay focused!

Change management is a comprehensive, cyclical and structured approach to transition individuals, groups and organizations from a current state to a future state with desired business benefits. The process of change begins with the organization's leaders developing an organizational strategy, then creating an initiative that is aligned with that previously defined strategy. Such strategic initiatives are formulated as a direct response to a change in the business environment.

3.1 CITSmart best practices for organizational change management

The deployment of a new system always changes the *modus operandi* of an organization. CITSmart recommends as a good practice the adoption of an OCM process, in parallel with the deployment process, to minimize any negative impacts and, consequently, greater acceptance of the new system, allowing the organization to achieve the expected results and performances.

To ensure clarity and effectiveness, based on Kotter's ADKAR and 8-step models, it is appropriate to follow some practices that support and corroborate the success in the deploy the organizational change management model, maintaining engagement and delivering the desired results in a sustainable manner. The choice between them should be defined by the organization:

- Identify and involve people in strategic positions in the organization;

- Make a powerful alliance: identify influencers and empower change agents;
- Invest in communication in order to arouse motivation in people. It is important to ensure that the message reaches everyone in the right way;
- Create a vision for change, making clear the reason for the change and its benefits;
- Create a vision that guides people: make change part of the organizational culture, considering the principles and values of the organization;
- Create a sense of urgency ("act immediately" to achieve expected results);
- Create short-term goals;
- Ensure that human, technical and regulatory barriers are removed.

In order to effectively manage the human side of change, a plan should be developed that includes concrete measures to achieve the main objectives of change, involving people who need to "change" within the organization. In order to develop a consistent and effective plan, in addition to identifying the key users, it is important to identify the changes in how the work is performed without the new system and how it will be carried out after the change, which will identify:

- the most critical points that may lead to user resistance and, consequently, to define new proposals to mitigate these points of attention.
- the expected improvements and benefits with change, which will facilitate the construction of the motivation/engagement discourse.
- the target audience so that the change plan contemplates the necessary actions to involve and engage the users of the new system.

With the change plan ready and detailed, it is time to perform the actions defined. Such actions usually culminate in marketing strategies and experimentation of the tool, for example, workshops. They may continue in parallel to the deployment process but will be more heavily addressed in the product rollout. It is important to follow the execution of the plan in detail, to feel the perception of all those impacted with the new system and to deal promptly with any deviations.

3.1.1 Prepare

At this stage, plans are defined to eliminate the bottlenecks that can be generated with the change, which in this case is the implementation of a new system, whose main objective is to achieve, in terms of goals, the expected results for the process in question.

To plan the organizational change model, you should follow the steps listed:

Step	Action/Actors	Objectives	Inputs/Outputs
Mapping key users	**Action:** Map the key users. **Actors:** Project team.	1 - Identify the key users (target audience) who will be impacted by the deployment of the new service management system.	**Input(s):** 1 - Information collected from the project team. **Output(s):** 1 – Target audience of change.

Mapping scenarios	**Action:** Map the current and future scenario. **Actors:** Project team.	1 - Identify changes in how things are done without the new system and how they will be done after the change. 2 - Identify critical points that can bring resistance and mitigation actions.	**Input(s):** 1 - Information collected from the project team. **Output(s):** 1 - Mapped change scenarios. 2 - Critical points and actions to mitigate identified problems.
Developing the Organizational Change Plan	**Action:** Develop organizational change plan. **Actors:** Project team.	1 - Define and plan the actions needed to involve and engage the users of the new system. 2 - Formalize the organizational change plan, using all the information generated in the previous steps.	**Input(s):** 1 – Information generated in previous steps. **Output(s):** 1 - Organizational change plan developed and approved.

3.1.2 Execute

In this step, the actions defined in the first step are executed. This is the most important stage of the cycle where a poorly executed plan will lead to the failure of the project and must be monitored in detail, so that there are no deviations under the planned.

Any deviation should be documented, communicated and treated promptly.

To execute the organizational change model, you should follow the steps below:

Step	Action/Actors	Objectives	Inputs/Outputs
Deployment of the change plan	**Action:** Execute the organizational change plan. **Actors:** Project team and stakeholders.	1 - Execute the actions of the organizational change plan.	**Input(s):** 1 - Approved organizational change plan. **Output(s):** 1 – Updated change plan. 2 – Evidence of execution of the change plan.

3.1.3 Evaluate

At this step, the effectiveness of the change process is analyzed. From this point on, an accurate comparison can be made of what was obtained and what was expected in the previous step ("Execute"). Differences will have to be considered - whether positive or negative, in order to analyze the whole process, in order to allow a proper critical analysis.

The main objective of this phase is to detect any errors or failures developed during execution.

The errors and failures must be documented by criticality and reports for monitoring and, if appropriate, carry out due treatment in the next step of the process.

To evaluate the organizational change model, you should follow the steps below:

Step	Action/Actors	Objectives	Inputs/Outputs
Evaluating the effectiveness of the change plan	**Action:** Evaluate execution of organizational change plan. **Actors:** Project team and stakeholders.	1 - Evaluate the effectiveness of the organizational change plan in order to detect possible failures or distortions in the actions carried out. 2 - Documenting failures and, if appropriate, undertaking due treatment in the next step of the organizational change process.	**Input(s):** 1 – Updated Change Plan. **Output(s):** 1 - Organizational change plan evaluation registration, indicating the failures and distortions that must be attended by priority.

3.1.4 Fix and refine

In this step, corrective actions will be taken based on what has been previously evaluated/verified. The identified failures should be fixed and addressed for treatment in the previous step, in order to ensure that the effective measures will be taken to correct the route of the new system deployment project, as well as to address possible distortions that have deviated from the expected results, determining its causes.

There are usually two possible results in this step:

The first is to accept that the cycle worked in terms of easing bottlenecks. In this way, the proposed changes must be implemented and rooted in the culture of the organization. The cycle should be redone in order to refine the process or to minimize new bottlenecks detected during execution.

The second possible result is to realize that the proposed plans did not solve the contemplated bottlenecks, probably due to errors of previous diagnoses. In this case, the cycle should be repeated focusing on the same process or bottleneck, except if the responsible team believes that the process is already mature enough.

For the correction of the organizational change model, you should follow the steps listed below:

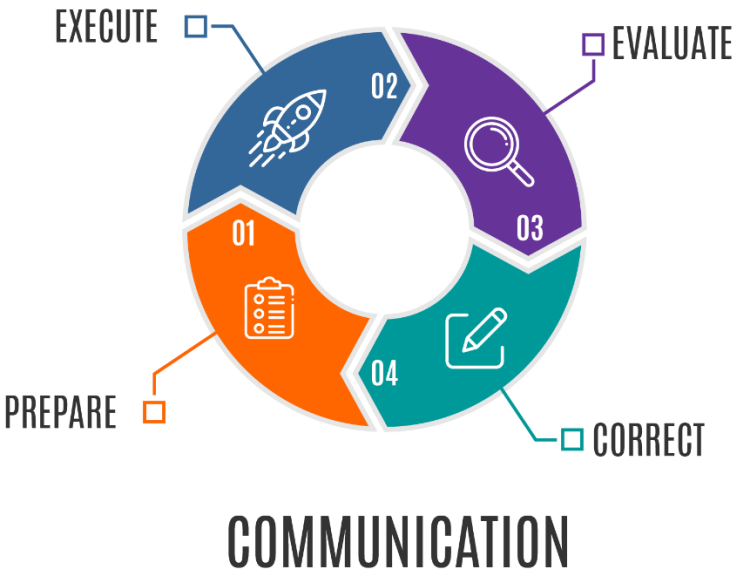
Step	Action/Actors	Objectives	Inputs/Outputs
Fixing and refining failures and distortions that impact on change	**Action:** Fix failures and distortions of the organizational change plan. **Actors:** Project team and stakeholders.	1 - Fix identified and forwarded failures and distortions for treatment in the previous step. Fix/improvements should be made available to stakeholders.	**Input(s):** 1 - Organizational change plan evaluation registration, indicating the failures and distortions that must be attended by priority. **Output(s):** 1 - Treated failures and distortions.

4. COMMUNICATION MANAGEMENT

Being clear about what is to be done is a critical success factor and we believe that, the best way to achieve it, is by defining an accurate communication process. Therefore, for clarity of communication, it is important to establish an active and standardized flow and communication matrix throughout the project. The constant feedback of the executed actions allows greater synergy between the project team, mitigates the amount of errors and increases the quality of the final delivery, minimizing the rework.

4.1 CITSmart Methodology for Communication Management

The CITSmart Methodology for Communication Management was based on a cyclical process of continuous improvement, in order to facilitate understanding and deployment, as shown in the following figure:



4.1.1 Prepare

This stage describes the steps required to plan the communication process during the project. Because it is a cyclical process, the inputs and outputs of this step can be constantly updated, according to the identified needs.

To plan the communication model, you should follow the steps listed below:

Step	Action/Actors	Objectives	Inputs/Outputs
Establishing Communication Channels	**Action**: Define official project communication channels. **Actors:** Project team.	1 - Define the official communication channels of the project.	**Input(s):** 1 - Information collected with the project team. **Output(s):** 1 - Defined communication channels.
Mapping actors	**Action:** Map communication actors. **Actors:** Project team.	1 - Mapping communication, announcer and receiver actors - main and substitute. All contacts of people engaged should be kept current and shared with the project team.	**Input(s):** 1 - Information collected with the project team. **Output(s):** 1 - Mapped Process Actors.
Building the communication matrix	**Action:** Create a communication matrix **Actors**: Project team	1 - Create communication matrix: map the main subjects to be informed, expected actions/objectives, who is responsible for sending and who should receive the information (audience), by what means, at what frequency and what product can be generated (example: meeting registration, requirements survey registration, status report (project progress), alert report). 2 – Formalize/disseminate the communication matrix.	**Input(s):** 1 – Information gathered with the project team. **Output(s):** 1 – The communication matrix created.
Preparing the communication Plan	**Action:** Prepare the communication plan. **Actors:** Project team and stakeholders.	1 - Define and plan the actions needed to ensure effective communication for all stakeholders. 2 – Formalize/disseminate the communication plan, using all the information and artifacts generated in the previous steps.	**Input(s):** 1 – Communication matrix. **Output(s):** 1 – Communication plan prepared and approved.

4.1.2 Execute

At this stage the communication plan approved by the stakeholders starts to be executed and must be activated throughout the project according to the needs found.

To execute the communication model, you should follow the steps listed below:

Step	Action/Actors	Objectives	Inputs/Outputs
Deploying the communication Plan	**Action:** Execute the approved communication plan. **Actors:** Project team and stakeholders.	1 - Execute the communication plan at all stages of the deployment project.	**Input(s):** 1 – Communication plan. **Output(s):** 1 – Updated communication plan. 2 – Execution evidence of the communication plan.

4.1.3 Evaluate

At this stage the effectiveness of the communication process will be constantly monitored and evaluated in order to identify possible deviations and adequations in its execution.

To evaluate the communication model, you should follow the steps below:

Step	Action/Actors	Objectives	Inputs/Outputs
Evaluating the effectiveness of project communication	**Action:** Evaluate execution of communication plan. **Actors:** Project team and stakeholders.	1 - Evaluate the effectiveness of the communication plan in order to detect any failure or distortion in the communication applied throughout the project. 2 - Document failures and, if appropriate, perform due treatment in the next step of the communication process.	**Input(s):** 1 – Updated communication Plan. **Output (s):** 1 - Evaluation registration of the communication plan, indicating the failures and distortions that should be addressed with priority.

4.1.4 Fix/Refine

In this stage, with the inputs generated in the previous step, corrective actions can be determined and applied to improve the communication process.

To fix the communication model, you should follow the steps listed below:

Step	Action/Actors	Objectives	Inputs/Outputs
Fixing and refining communication failures and distortions	**Action:** Fix communication plan failures and distortions. **Actors:** Project team and stakeholders.	1 - Fix identified and forwarded failures and distortions for treatment in the previous step. Fixes/improvements should be made available to stakeholders.	**Input(s)**: 1 – Evaluation registration of the communication plan indicating failures and distortions that should be addressed with priority. **Output(s):** 1 – Treated failures and distortions 2 – Updated and versioned Communication Plan.

4.2 How should we conduct communication?

To ensure clarity and effectiveness, together with the stages defined above, it is appropriate to follow some practices that support and corroborate with the communication process.

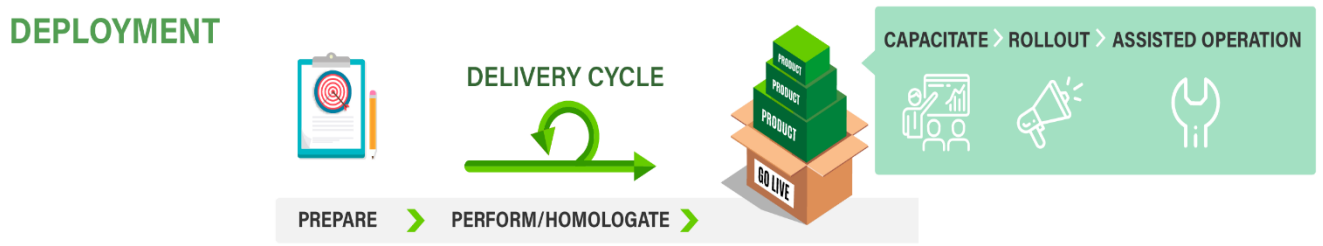
- Establish official channels for project communications early on, so that information flows in order to serve all areas.
- In order to be efficient, communication should be regular, that is, there must be periodic and always pre-scheduled meetings between team members, in addition to constant exchanges of ideas through established communication channels. The methodology does not have the purpose of "engaging" the communication process, therefore, in the choice of channels can be considered several means, for example: telephone, email, face-to-face conversations and others.
- The "Plan of the Project", containing the "Communication Plan", should be elaborated and updated constantly and shared with all those involved in a timely manner. These updates include any business changes, from team members, as well as any negotiation relevant to the project.
- The document must be versioned whenever updated after approval of the client and the new approval must be formalized. The project plan should always be kept in a single repository, accessible to all in a controlled manner, preventing erroneous versions of the document from being used by the teams during project execution.
- All communication involving the definition or change of objectives, costs or deadlines should be sent mainly to the project sponsors and others involved with decision-making power, for formal approval.
- All communication that approves a certain fact of the project must have a clear and unambiguous response, which can be signed in the physical document or approved by email.
- When verbal communication (by telephone, teleconference, or other digital means) happens, it's necessary to be formalized and officialized through email or other means that guarantees understanding between the parties.
- Always document errors, success and feedbacks. It is important that the lessons learned from a project are shared with the whole team, which includes the participants who were present at each stage and those of future initiatives. In this way, the project leader can make sure that good practices are replicated, and bad practices avoided.
- A meeting should be held at the end of each stage of the project to distribute and collect new insights on problems found, lessons learned and what should be done to avoid risk situations in the next processes.
- The holding of meetings should have the agenda, duration and role of each member previously defined and proportional to the stages of the project. Meetings with no objective and long-lasting are counterproductive and end up taking the time the team could be devoting to more important tasks.
- Be proactive, monitor risks and promptly communicate to the people involved.
- Make sure the message is clear and unequivocal. The content and forms of language need to be adequate for the recipients of the messages - that is, an email sent to the legal sector will not always be understood or interesting by the technical team, and vice versa.

- It is very important to be clear, consistent, continuous, and complete when communicating with the team.

4.3 What should be avoided

- Do not make confirmations or approvals by unofficial instruments, such as SMS, messages by applications or meetings not formalized (by registry or other means), or that does not yet have the participation of the main actors with this function or responsibility in the project.
- Do not start any work without prior approval.

5. CITSMART METHODOLOGY FOR DEPLOYMENT



5.1 Prepare

In this stage it is fundamental that the context be understood. Clarity is needed on what needs to be done.

The first step in the FDM deployment is undoubtedly the most important. Knowing what should be done is a determining factor for success. Be clear about the scope of delivery.

For this, we consider this step the connection between the commercial team and the technical team (delivery). This step is called transition. It is a delicate moment, because the business visions (need to close deals), client (dream sold) and operation (delivery) need to be aligned.

For the deployment planning, you should follow the steps below:

Step	Action/Actors	Objectives	Inputs/Outputs
Understanding the context	**Action:** Promote internal transition meeting. **Actors:** Commercial team and Project team.	1 - To pass on all the knowledge about the project and about the client acquired during the commercial process. 2 - Forward all relevant documentation to the technical team. 3 - Identify Stakeholders. 4 – Identify project risks.	**Input(s):** 1 - Document about capture of information (Workbook - Technical Discovery). 2 - Commercial proposal or contract. 3 - Emails or other relevant communication artifacts. **Output(s):** 1 - Project Plan Proposal.

Promoting kickoff meeting	**Action:** Promote Kickoff meeting. **Actors:** Client, Project team.	1 - Present and approve the Project Plan, elaborated from the understanding of the context; 2 - Present the project deployment team (provider); 2 - Guide the client on the strategies of communication and OCM (Organizational Change Management); 3 - Align/Equalize expectations, especially deadlines; 3 - Present/Adjust macro timeline; 4 – Define critical necessities; 6 - Present deployment strategy, including mapped risks so far and quick-wins (business necessities and quick wins).	**Input(s):** 1 - Initial proposal of the Project Plan, containing scope and non-scope, risks and restrictions mapped so far, besides the macro timeline. **Output(s):** 1 – Meeting Registration: 2 – Validated Project Plan.
Preparing Project Plan	**Action:** Prepare the final version of the Project Plan. **Actors:** Project team.	1 – Finish the Project Plan: Present and document the main features of the client's business and how the CITSmart solution will be implemented to meet the contracted scope.	**Input(s):** 1 – Validated Project Plan. **Output(s):** 1 – Approved Project Plan.

5.2 Perform/Homologate

In this stage, it materializes what was sold and agreed with the client in a useful solution that delivers value to it. Such value is best realized through continuous deliveries and shorter feedback cycles. In this sense, there was a merger of the "Perform" and "Homologate" stages, adding agile characteristics to the project.

We must keep in mind that in order to succeed, the clients need to understand the value delivered to them. This stage provides the validation of information gathered previously. In this way, errors and adjustments can be handled more assertively, reducing rework and delays in the final delivery.

Two questions need to be answered before proceeding:

- The first question is: “Is it 100% clear what should be done?”. If this question cannot be answered with certainty, then let's first clarify the doubts.
- The second question is “Do you know what problems or pains are being solved with the adoption of the solution?”. If this question cannot be answered then let's clarify it, as this is a key to achieving and showing clients success.

Having clarity on the issues above, follow the steps below:

Step	Action/Actors	Objectives	Inputs/Outputs
Gathering technical requirements	**Action:** Promote technical meeting for "Workbook - Technical Discovery". **Actors:** Technical project team (partner and/or manufacturer) and client.	1 – Map technical requirements for configuring and customizing the CITSmart platform.	**Input(s):** 1 - Document for capturing technical information (Workbook – Discovery Técnico). **Output(s):** 1 - Workbook – Technical Discovery completed according to client's requirements and approved.
Configuring and customizing the CITSmart Platform	**Action:** Customize and configure the Solution according to information in the Workbook - Technical Discovery. Segment the macro timeline into smaller delivery cycles, according to priority items for the solution sold. Adjust the requests made by the client, after homologation of partial deliveries. **Actors:** Technical project team (partner and/or manufacturer).	1 - Configure and customize the CITSmart Platform: it is in this step that the registers are inserted into the system, either by importing the legacy system or by insertion by the consultants/users. It is at this step that flow automations, dynamic form creation, and integrations are performed.	**Input(s):** 1 – Macro timeline 2 - Workbook – Technical Discovery completed according to client's requirements and approved. 3 – Adjustments requested by the client after homologation of partial deliveries. **Output(s):** 1 – Platform modules configured according to requirements gathered or points for the client's homologation.
Homologating partial deliveries	**Action:** Homologate the delivered functionality. **Actors:** Technical project team (partner and/or manufacturer) and client.	1 **–** Homologate partial deliveries. 2 – Prioritize the necessary adjustments to be made.	**Input(s):** 1 - CITSmart Platform Modules configured as the requirements gathered. 2 – Script of tests. **Output(s):** 1 – Script of tests. 2 – Request for change (when to change scope, term or budget). 3 – Client acceptance for each delivery cycle, including possible set points requested.
Homologating the solution	**Action:** Homologate the complete solution. **Actors:** Technical project team (partner and/or manufacturer) and client.	1 - Perform integrated testing. Here it is guaranteed that it is possible to make the system available in production (Go Live). 2 – Make the necessary adjustments identified in the tests.	**Inputs(s):** 1 – Script of tests. **Output(s):** 1 – Script of tests completed. 2 – Final client acceptance after all the adjustments demanded.

5.3 Capacitate

In this stage, the user is trained in the solution deployed. Capacitation is a very important step in the solution deployment. As innovative as it may be, key users must be familiar with the solution, otherwise their potential will be underutilized.

Step	Action/Actors	Objectives	Inputs/Outputs
Training key users	**Action:** Train users. **Actors:** Training team (partner and/or manufacturer) and key client's users.	1 - Conduct trainings. Training key users is critical since they are the multipliers of knowledge in their teams.	**Input(s):** 1 - Menus by user profile. 2 – Course material. **Output(s):** 1 - Lists of signed participants. 2 - Training evaluation sheets completed.

5.4 Rollout

In this stage the launch of the new product is made through a marketing strategy.

Step	Action/Actors	Objectives	Inputs/Outputs
Launch of New Platform	**Action:** Promote marketing and/or endomarketing advertising campaign. **Actors:** Client Marketing Area, the manufacture and/or partner area can support it.	1 - Make marketing and/or endomarketing campaign to launch the system in production, where it is informed: advantages of the new solution, access instructions, channels for clarifying doubts, among others.	**Input(s):** 1 - Email marketing template. 2 - Institutional videos model. 3 - Folders and/or other advertising pieces. **Output(s):** 1 - Promoted advertising pieces in a timely manner.

5.5 Go live

At this stage, the solution is ready for use and will be moved to the production environment, making it officially available to users.

5.6 Assisted operation

In this stage, adjustments, tests and all the necessary support are made, providing the solution's operation until the client can take over the activities completely.

Step	Action/Actors	Objectives	Inputs/Outputs
Making the Assisted Operation	**Action:** Assisted Operation. **Actors:** Project technical team.	1 – Make the assisted operation. At this step, the consultant usually assists the operation during an agreed period, adjusting some unidentified point in the tests of the Preparation and Final Preparation phases, as well as supporting the users, who totally change their routine and are getting used to the new tool.	**Input (s):** 1 – Monitoring and support. **Output(s):** 1 - Assisted Operation Document signed after completion of the operation (containing the adjusted items, if any).

5.7 PROJECT CLOSURE

In this stage, the project is concluded with the delivery of the results to the client. The documentation is consolidated, and the closure of the project is communicated to stakeholders.

The closure of the project is accompanied by the generation of the "Lessons Learned" document, which will be the base for the improvement of the team's processes.

Step	Action/Actors	Objectives	Inputs/Outputs
Closing the project with the client	**Action:** Promote closing meeting with the client. **Actors:** Project team and client.	1 – Present project closure term.	**Input (s):** 1- Closure term. **Output(s):** 1 – Closure term signed.
Closing the Project with the team	**Action:** Promote closure meeting with project team. **Actors:** Project team.	1 – Document and present project successes and/or failures in the lessons learned report.	**Input(s):** 1 – Lessons learned report. **Output(s):** 1 – Consolidated lessons learned report.

6. QUALITY

To assess the effectiveness of the process, identifying possible deviations and items for improvement, the facilitator will use three models of analysis:

- Methodology checklist: identify if the processes were fulfilled, using the inputs and generating the expected outputs.
- Lessons learned: identify which points have worked well, which can be improved, and what actions need to be taken to achieve continuous improvement.
- Training evaluation: identify the users' perception about the effectiveness of the training received in the Training phase of the methodology deployment process.

7. ARTIFACTS AND MODELS

The document models used, and generated artifacts are extremely important for the traceability and measurement of the results achieved with the use of the methodology.

Each process defines its deliverables. Here are presented the artifacts to be produced during the execution of the processes of this methodology.

7.1 Artifacts of Communication Management

- Communication Plan Template

7.2 OCM Artifacts

- Change Plan Template

7.3 Deployment Artifacts

- Workbook Template – Technical Discovery
- Project Plan Template
- Kickoff Meeting Template
- Status Report Template
- Script of Test Template
- Acceptance Term Template
- Project closure term Template

7.4 Analysis Models

- Methodology checklist
- Lessons learned template
- Evaluation and training template

7.5 Other templates

- Meeting Registration Template
- Request for Change Template

8. FINAL CONSIDERATIONS

CITSmart Corporation understands that the methodology presented does not specify execution modes, but indicates the main points observed that lead to the proper implementation of the solution that it commercializes.

The points presented are consequences of good planning done at the beginning of the project and are essential to identify possible risks and opportunities for improvement, defining the best strategies to manage them.