ClickUp SOP - Mediusware

1. Purpose

This Standard Operating Procedure (SOP) defines the software development workflow at Mediusware Limited, using ClickUp as the central project management tool. It outlines how each stakeholder—including Management, CTO, Project Managers, Business Analysts, Developers, QA Engineers, and Designers—utilizes ClickUp to support structured planning, effective collaboration, accountability, progress tracking, and quality software delivery.

The SOP is designed to establish consistency, improve efficiency, and ensure high-quality outcomes throughout the software development lifecycle.

2. Project Kickoff

2.1 Pre-Kickoff Preparation

- Review and approval of Statement of Work (SOW)
- Finalized contract and signed NDA
- Initial requirements gathered from the client or discovery
- Tool and account access setup for ClickUp, Git, Slack, and others
- Creation of project folder and structure in ClickUp
- Resource allocation and team assignment

2.2 Defined Roles and Responsibilities

- Client Experience Manager: Primary contact for all communications and managerial approvals
- Technical Project Manager (TPM): Oversees planning, reporting, and execution
- Business Analyst (BA): Handles requirement gathering and documentation
- Lead Dev/Tech Lead / CTO: Provides technical direction and code review
- Developers: Responsible for implementation
- QA Lead: Manages quality assurance and test coverage
- UI/UX Designer: Delivers design assets and specifications

2.3 Project Scope and Goals

- Creating a Work Breakdown Structure (WBS) based on Project Scope and Goals by defining key deliverables, features, and modules.
- Confirm project timelines and deadlines
- Set acceptance criteria
- Establish budget and resource constraints
- Identify key success metrics

2.4 Tool Setup

- ClickUp: Task management, Docs, dashboards
- Slack/Email: Communication
- Google Drive/Notion: Documentation and asset sharing
- GitHub/GitLab: Version control
- Figma/Adobe XD: Design delivery

2.5 Kickoff Meeting Agenda

- Introductions and team roles
- Project goals and vision
- Review of deliverables, scope, and limitations (to align on what will and will not be delivered)
- Setting expectations and managing out-of-scope requests
- Tool access and communication plan
- Timelines and key milestones
- Assignment of immediate next steps

3. ClickUp Project Structure Overview

3.1 Hierarchy: Spaces > Folders > Lists > Tasks

ClickUp uses a hierarchical structure that ensures clarity and separation of concerns across projects and departments.

3.2 Standard Structure

Space: Client Projects
Folder: [Project Name] - [Client Name]
Lists:

- Sprint Backlog
- Sprint 0 - Setup
- Sprint 1, Sprint 2, etc.
- Design
- QA & UAT
- Documentation
- Bugs & Issues
- Retrospectives

3.3 Supporting Spaces **(Optional)**

- **Client Management:** For client onboarding, communication logs, change requests
- **UI/UX Design:** To manage design workflows and handoffs with developers
- **QA & Testing:** Centralized QA test cases, regression logs, and release readiness

3.4 Task Details

Tasks can include:

- Subtasks
- Custom Fields: Priority, Story Points, Status, Assignee
- Dependencies and relationships

- Linked Docs, Design files, Test Cases
- Time estimates and logs

3.5 Views and Automation

- Board View: Visual kanban style workflow
- List View: Task-level detail and filtering
- Gantt View: Timeline-based planning
- Docs View: Embedded or linked documents
- Dashboards: Custom reporting for PMs and Executives

Use automation to assign tasks, update statuses, notify stakeholders, and more to enhance productivity and reduce human error.

4. Sprint Planning and Estimation Guide

4.1 Sprint Planning Process

- Conducted at the start of every sprint (typically bi-weekly)
- Involves TPM, BA, Developers, QA, and optionally CTO

4.2 Planning Steps

1. Define Ideal Customer Profile (ICP) to align features with target users
2. Create and refine user stories based on ICP and project goals
3. Review backlog and prioritize user stories
4. Define sprint goal and team capacity
5. Select stories based on priority and capacity
6. Add detailed acceptance criteria to each story
7. Estimate effort using story points or hours
8. Assign tasks and subtasks to team members
9. Link relevant documentation, designs, and test cases

4.3 Estimation Guidelines

- Review past team performance and task complexity
- Ensure developers and QA provide joint input
- Include buffer for testing, bugs, and code review
- For projects or milestone estimates, get approval from the CTO before sending to the client.

4.4 ClickUp Configuration

- Create Sprint List or Folder
- Use custom fields: Story Points, Priority, Assignee
- Add Sprint Start/End dates
- Set up views: Board View (by status), List View (by assignee), Gantt Chart (for dependencies)

5. QA and Release Protocols

5.1 QA Workflow

- Developers move tasks to "Ready for QA" list and also change status of a task to “QA Ready” when development is complete.
- QA team reviews task description, acceptance criteria, and related documents.
- QA performs one or more of the following:
  - Manual testing based on acceptance criteria.
  - Automated test execution (if applicable).
  - UI/UX consistency check against design files.
  - Functional and regression testing.
- Any bugs found are logged as subtasks or linked tasks with proper classification.
- QA updates status to:
  - **Tested** – if passed successfully.
  - **Rejected** – if critical issues are found. The task is reassigned to the original developer.
- Developers resolve issues and resubmit to "Ready for QA".
- The cycle repeats until approval.

5.2 Bug Reporting Standards

- Clear title and description
- Steps to reproduce
- Expected vs. actual result
- Environment (Dev, QA, Staging, Production)
- Severity level
- Screenshots or logs if applicable

5.3 QA Reporting

- QA Dashboard with open vs. closed bugs, pass/fail rate, and velocity
- End-of-sprint QA report shared via ClickUp Doc

5.4 Release Protocol

- Ensure all tasks in "Tested" list are linked to the release version
- Attach release notes in ClickUp
- Perform sanity check in staging
- Obtain sign-off from TPM/CTO
- Deployment executed by DevOps or Tech Lead
- Move all tasks to "Released/Completed."
- Notify stakeholders with release notes
- **After release, notify Operations to proceed with payment processing**—include reported information such as total duration, hours worked, and any relevant summary for invoicing.

5.5 Release Notes Template

- Version number
- Release date
- Features delivered
- Bugs fixed

- Known issues

6. Client Communication Cadence

6.1 Communication Schedule

Type	Frequency	Owner	Format
Weekly Progress Report	Weekly (Friday)	Technical Project Manager	ClickUp + Email
Client Sync Call	Bi-weekly	TPM + BA	Zoom + ClickUp
Sprint Demo	End of Sprint	TPM + Dev + QA	Live Demo + Doc
Monthly Executive Summary	Monthly	TPM + CTO	ClickUp Doc or PDF
Ad-Hoc Escalations	As needed	TPM or CTO	Email or Call

6.2 Weekly Progress Report Content

- % completion vs plan
- Completed, ongoing, and blocked tasks
- Key decisions needed
- Priorities for the next week

6.3 Monthly Executive Summary

- Milestone progress
- Budget utilization
- Risks and mitigations
- Roadmap preview

6.4 Communication Tools

- ClickUp: Project status, Docs, dashboards
- Email: Formal updates
- Zoom/Google Meet: Client meetings
- Slack: (If used with client) Ad-hoc updates

7. Post-Mortem / Retrospective Template

7.1 Purpose

To reflect on the sprint, identify what worked well, what didn't, and how to improve future sprints.

7.2 Sprint Info

- Sprint Name and Dates

- Team Members Involved
- Sprint Goal

7.3 Metrics Summary

- Planned vs. completed tasks
- Spillover
- Bugs reported and resolved
- Velocity

7.4 Retrospective Structure

What Went Well

- List of wins and successful practices

What Didn't Go Well

- Bottlenecks or blockers
- Missed timelines or quality issues

Lessons Learned

- Key insights from the team

Action Items

Action Item	Owner	Due Date	Status
Improve estimation accuracy	PM	[Date]	Open

Team Feedback (Optional)

- Anonymous or open comments

7.5 Documentation

- Use ClickUp Doc linked to Sprint Folder
- Store retrospectives for future reference
- List of all credentials used during the development.
- Prepare full feature and technology documentation and guides that can also be used by marketing

8. Conclusion

This SOP serves as a guide for all stakeholders involved in Mediusware's software development process. Adhering to these protocols ensures consistent project execution, improved team collaboration, and higher-quality deliverables. All teams are expected to regularly review and refine their use of ClickUp to maintain optimal performance and alignment with company standards.