

VINCIT PROJECT FLOW

MISCELLANEOUS PROJECT (CONCEPT DESIGN, TRAINING, CONSULTING, (OFFSITE) OUTSOURCING ETC.)

ACTIVE

Project work is being done.

- Project stage is changed to Active in BIT.
- Invoicer issues invoices to customer according to quotation.
- Project Lead calls a kick off meeting with all stakeholders if appropriate.
- Project Lead creates required BIT tasks.
- Project Lead creates project information document and keeps it up-to-date (if appropriate).

FINISHED

Project has ended.

- Project stage is changed to Finished in BIT.
- Invoicer issues final invoice.
- Material (if any) delivered to customer and archived.
- Sales Owner asks reference permission from customer.
- Project Lead creates Project Reference Card.
- Everybody in the Project Team updates CV.

SALES

LEAD

Lead materializes when we discover a potential new customer case.

- Sales Owner creates a new opportunity the BIT.
- If the customer is new, Account Manager and Invoicer are appointed, and customer is created to BIT.
- Sales/Lead project is created to BIT.
- Sales Owner creates NDA with customer, if required. NDA is stored with other project documents.

QUOTATION

We get Request for Quotation (RFQ) from customer.

- Sales Owner changes project stage to Sales/Quotation in BIT.
- If RFQ is for a software project:
- Project Lead or Agile Coach is appointed.
 - If project's scope is unclear, Sales Owner prepares quotation for concept design project to customer.
 - Otherwise Project Lead forms an Estimation Team.
 - Non-Functional Requirements are gathered from customer. Known Non-Functional requirements should be listed in quotation.
 - Estimation Team creates workload estimation for the project.

- If RFQ is for a miscellaneous case or concept design project, or Sales Owner decides to propose concept design for the customer:
- Project Lead is appointed, if required (otherwise Sales Owner takes care of Project Lead's tasks).
 - For concept design project, Project Lead forms a Concept Design Team.

Sales Owner creates quotation and sends it to customer.

WON

Customer accepts our quotation.

- Project stage is changed to Sales/Won in BIT.
- Purchase Order, Frame Agreement etc. are prepared by Sales Owner and stored with the project documents.

SOFTWARE PROJECT

ACTIVE

Project work starts.

Project stage is changed to Active in BIT and relevant fields are updated in project info page. Make sure that at least these are updated:

- Project budget
- Project lead
- Source code repository
- Backlog location
- If BIT does not have a dedicated field for everything, use generic URL types for the info.

Project Lead calls a kick off meeting. Sales Owner, Project Team and customer's representatives are invited. Goals for the meeting:

- Common understanding of project goals and roles of people.
- Development, reporting and communication practices & Definition of Done are agreed with the customer - AKA Working Agreement.
- People get to know each other to ease communication during the project.
- Agree whether a Steering Group is formed for the project.
- Agree on how and when retrospectives are organized during the project.

Project Lead calls a project team goal meeting, where project team individual goals are discussed and tracked.

Project Lead sends overview of the project to employees@vincit.fi

KICK OFF

Project work starts.

Software development work is being done.

- Backlog is always kept up to date.

Project Lead's tasks:

- Calling and facilitating project meetings.
- Backlog maintenance (e.g. prioritization, ensuring quality of backlog items).
- Budget management.
- Reporting status to other Vincitizens & customer according to agreed practices (e.g. weekly email).
- Escalating reclamations to CEO and sales owner.
- Keeping project folder up to date, removing obsolete files.
- Ensuring continuous improvement (utilizing e.g. retrospective meetings)
- Send customer satisfaction query every three months and when the project ends.

Invoicer's tasks:

- Sending invoices.

FINISHING

Customer wants to finish the project.

- Remaining work is finished according to agreement with customer.
- Sales Owner asks reference permission from customer.
- Project Lead creates Project Reference Card.

MAINTENANCE

Active project development has ended but bug fixes or other maintenance work is done when needed. Maintenance phase is skipped for projects which don't need support from Vincit after development.

- Project stage is changed to Maintenance in BIT.
- Project lead manages maintenance tasks.
- Invoicer sends invoices.

FINISHED

Project work has ended.

- Project stage is changed to Finished in BIT. No more work can be logged for the project.
- Invoicer issues final invoice.
- Final material delivered to customer, including:
 - Source code
 - Graphics
 - Technical Specification
 - Other documentation
- Project Lead verifies that project's information in BIT is complete.
- Everybody in the Project Team updates CV.
- Project Lead revokes customer's access to information systems which are not needed anymore.