

## **FIVE STEPS THAT ENSURE SUCCESS**

UP2's process-based methodology for implementing catalog and configuration systems is iterative in nature.

Your application is developed incrementally with increasing degrees of detail and refinement - first on paper, then in prototype and finally in alpha, beta and final releases.

This approach assures a quality product while minimizing possible surprises that can impact schedule and budget.

The UP2 project cycle is broken into three distinct phases consisting of five activity-based steps.

The first phase encompasses the proposal and model steps.

At the end of this phase, the system design is determined and initial estimates for resources, timing and costs are validated.

Along with costs and completion dates, our proposals include clear acceptance criteria, a release plan, and a detailed list of your and our responsibilities during the project.

The percentages shown below are rough indications of time and resource allocations for each of the five steps of the project cycle. Activities and percentages are adjusted according to the specific needs of a given project.




### **1) PROPOSAL – 10%**

The goal of this first step is to generate a project proposal that provides an initial estimate of project scope, duration and cost.




Based on a preliminary understanding of the project requirements and the technical issues involved, the proposal serves as a starting point for the technical development.

The primary deliverable for the proposal phase is a vision and scoping document. It explains, at a medium level of detail, the functionality of the system, assumptions, inherent risks and dependencies, and any customer resources required.

## *Envision - Gather General Requirements (35%)*

-  Gather general customer requirements and project goals.
-  Establish general guidelines and assumptions.
-  Identify general risks, problems and alternatives.

## *Plan - Generate Project Proposal (65%)*

-  Develop technical approach.
-  Develop project work plan.
-  Estimate schedule and budget.




## **2) MODEL – 15%**

The goal of the second step is to generate a "paper" model of the system. Inexpensive to produce, this model allows all parties to readily visualize the system and discuss and refine its requirements and specifications.




In this step, we work with your team to rigorously analyze and precisely define your requirements. We evaluate system architectures and identify the one that best balances technological risks with cost and schedule considerations.

The deliverables for this step are a clear set of requirements, an initial architecture and a resolution of the major risks.




## *Envision - Gather Detailed Requirements (20%)*

-  Gather detailed customer requirements and project goals.
-  Establish detailed guidelines and assumptions.
-  Identify detailed risks, problems and alternatives.

## *Develop - Develop Straw man Design (45%)*

-  Identify GUI concepts and functionality.
-  Develop GUI layouts and usage storyboards.
-  Develop architecture diagrams and analysis.

## *Stabilize - Refine Straw man Design (35%)*

-  Present GUI, architecture and content straw man to customer.
-  Refine requirements and design according to feedback.
-  Update plans and specifications from the refined strawman design.

The second phase of the project cycle encompasses the development of the system from prototype to alpha release.

### 3) PROTOTYPE – 25%

The goal of the prototype step is to answer key technical issues concerning the system architecture and minimize the potential for surprises during system development. The key deliverable for this step is a prototype that is demonstrable but not intended for release.

We will document the level of risk that you are willing to take with regard to new technologies. New technologies may promise significant benefits, but can also present greater risks.

We will seek your participation throughout the prototype step as we further clarify requirements and iterate through design alternatives.

*Envision - Identify Prototype Goals (10%)*

 Identify key GUI, architecture and content issues.

 Identify key risks and alternatives.

*Develop - Develop System Prototype (65%)*

 Implement and assess the prototype.

*Stabilize - Prototype Alternatives (25%)*

 Present prototype and findings to customer.

 Solicit customer resolution of requirements as needed.


 Propose, implement and assess new alternatives.


#### 4) DEVELOP – 35%

The goal of this step is to finalize and implement the system design. The resulting system is completely functional, but stability testing and distribution is limited.

The develop step is split into several iterations, each iteration providing a stable intermediate release upon which greater complexity is built in the next iteration.

*Plan - Finalize System Design (15%)*

 Refine requirements and design according to prototype findings.

 Update plans and specifications from refined requirements and design.

*Develop - Develop Software and Contents (60%)*


 Develop GUI and architecture frameworks.

 Progressively populate frameworks with functionality.

 Produce data contents.

 Develop preliminary release procedures.

*Stabilize - Alpha Test (25%)*

 Perform in-house testing of the system as a whole.

 Release alpha-tested system to customer.

 Solicit feedback from customer.

The third phase takes the project from beta release to the deployment of a test-proven production system.


## 5) DEPLOY – 15%

The goal of the final step is to refine, bulletproof and release the system. During this phase, we will run different scenarios and test scripts.

After extensive testing, we will open up the application for you to test. Once you are satisfied with the quality of the work, we will move the project from a testing or quality assurance environment to a production environment.

### *Plan - Plan Beta Test (10%)*

 Refine requirements and design based on alpha findings.

 Generate plans for release, distribution, feedback and re-release.

### *Develop - Beta Release (25%)*


 Develop final release procedures.

 Implement alpha modifications.

 Release and distribute beta system to beta testers.

### *Stabilize - Bug Fix and Final Release (65%)*

 Implement beta fixes.

 Re-release beta system.

 Create and verify master copy of final release.

**FOR MORE INFORMATION**

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