Ultradata –
Product Management Lifecycle

June 2023

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Version Control

Date	Version	Issued By	Comments
13 October 05	1.0	Product Quality Manager	First Release
13 February 06	1.1	Product Quality Manager	
9 November 07	1.2	Product Quality Manager	Removed certain tasks and templates
15 November 07	1.3	Product Quality Manager	Added project Status template in build phase
3 January 08	1.4	Product Quality Manager	Include feedback from review by other managers
17 December 09	1.5	Product Development Manager	Updated Build Phase
31 March 2020	2.0	Senior Manager Business Services	Updated with Structural Changes
8 April 2020	2.1	Senior Manager Business Services	Updated with early adopter selection changes, project standard protocols, product release recommendation
23 April 2020	2.2	Senior Manager Business Services	Review with Leadership Team
31 July 2020	2.3	Senior Manager Business Services	Early Adopter selection process changes Change name from Software Development Life Cycle to Product Delivery Life Cycle
22 March 2021	3.0	Senior Manager Business Services	Annual review following full staff refresher training.
20 April 2021	3.0	Senior Manager Business Services	Changes for Leadership Team confirmation
8 June 2021	3.1	Senior Manager Business Services	Add Service products to the PDLC governance document
2 Aug 2021	3.1	Senior Manager Business Services	Add Prototype development section and handover expectations
16 March 2022	3.1	Chief Operations Officer	Update QA finalisation
6 April 2022	3.1	CEO	Change of name to Product Management Life Cycle
26 April 2022 27 April 2022 13 July 2022 26 July 2022	4.0	Head of Architecture Head of Marketing Senior Manager Business Services Board Chair	Add Architecture Review Section Updates to Marketing Sections Update Chief Business Officer title Update Master and Demonstration Accounts Legal Review section added
11 May 2023 30 Jun 2023	4.1	Senior Manager Support Head of Marketing PMLC Committee	Support Handover changes Marketing changes PRR approval, delegate option

Contents

Project Approval Phase

Project Initiation

When an idea for a new project is first raised the **Executive** initiating the project will detail the idea.

The Product Investment Committee regularly reviews the Potential Project List.
When the Product Investment Committee approves a project idea for further investigation, the Executive initiating the project will create a project to determine the feasibility and conduct research to determine the business requirements.

The Chief Business Officer is included in any outcome of the investigations to monitor R&D Claim eligibility.

Initial Investigation

The resource allocated from the business undertakes the initial investigation on possible options and impacts for a project. This investigation is expected to take approximately 5 days.

The Investment Committee will then be updated on the outcome of the investigation and a Product Recommendation is provided for consideration.

Product Definition

In relation to the Product Management Life Cycle the definition of a product may be a product built by Ultradata and delivered as a module, or it may be a product delivered as a service.

Some examples of a product delivered as a service are Ultracs Cloud Banking or Ultracs CMS hosting.

Product Prototyping

From time to time there may be a requirement to build a prototype. Where that process is approved through the normal investment process including the Product Investment Committee and/or CEO, then this additional step is required to be added to the standard Product Management Life Cycle.

When the initiation of a product requires more investigation due to new technologies or other reasons then the option to produce a prototype to explore the impact of the new technology or solution on the existing architecture is undertaken.

This process will use the same project protocols to manage the prototype phase of the product scoping, and then once agreed to proceed and move ahead with the product, it will have a handover to both Product Design and Product Development with all research shared to assist with teams with defining and building the final product.

The documentation that will be made available includes:

- Architecture diagrams
- Research notes including possible options to use as well as limitations
- Any initial design notes including features considered and included as must haves and any rejected in the initial research phase

Initiation Phase (Projects Scoping)

Design Session

From the initial investigation the **Business Analyst** creates a Design session demonstration which details the scope, design and functional ideas, screen layouts, process flows and requirements for industry specialists. The Design Session will assist in collating issues or suggestions to include in the design for the functionality. There may be multiple sessions held depending on the size and complexity of the project.

Participants for the sessions will be determined on a case by case basis.

Business Requirements

From the initial investigation the **Business Analyst** creates a Business Requirements document or uses the client Business Requirements Specification if initiated by a client.

The Business Requirements document is reviewed by an **internal group** and the **Senior Manager Design or Senior Manager Innovation**. The internal group would be made up of product experts with a customer perspective and any expertise provided by the prototype phase if available

Project Standard Protocols

The project is set up with a standardised naming convention to be used through the project life cycle and all areas are responsible for maintaining budget and approving timesheets for all segments related to their budget.

The naming conventions for the documents used through the Product Management lifecycle follow the format "PDnnn 'Project Short Name' Business Requirements vx.x" where nnn is the allocated project number and x.x is the version number of the document e.g. PD0539 Queenstown Business Requirements v1.5"

Legal Review

Using the Procurement form, the **Chief Business Officer** will be responsible for a legal review of any third party arrangement requirements in the design and development of a product as part of the product initiation process. The Investment Committee will require an initial review by the Design/Innovation team to advise if any third party arrangements may be required as part of the product initiation consideration.

No third party software or service is to be included in the project without agreement by the Investment Committee and authorisation via the legal review process. Team members are not to enter into any agreement (including 'click licences') on behalf of Ultradata or its subsidiaries without authorisation.

Design Phase (Defining project design and planning)

Focus Group (Optional)

Depending on the project content it may be advantageous to form a Focus Group of customers to assist in the development of Business Requirements.

The **Senior Manager Design or Senior Manager Innovation** and **Business Analyst** will assess appropriate customers to participate. Once the group is formed the Business Analyst will act as the main communication point for the group.

The **Focus Group** may highlight concerns, suggestions and business issues; however, development of documents and negotiating expectations with the Group is the **Business Analyst's** responsibility.

Project Approval Form

Using the Project Approval Form Template, the **Business Analyst** creates a Project Approval Form, as well as the Product Release Recommendation which are both sent to the **Product Investment Committee** for approval.
The Project Approval Form includes a budget estimate for all phases of the project across all teams.

Functional Specification

Using the Functional Specification Template, the **Business Analyst** will develop a Functional Specification document, which details the functional requirements and business rules required for the project. The functions contained in this document must follow the Presentation Standards for the particular application it applies to.

The Functional Specification may be developed with support from a Focus Group of customers. The Functional Specification document is reviewed by an internal group, the **Senior Manager Design or Senior Manager Innovation**, and the **Focus Group** where applicable. The internal group would be made up of customer focused product experts.

The Marketing Information Document will be delivered to the Head of Marketing at the same time as the Functional Specification is handed over to Product Development.

Integrated Marketing Communications Plan

The **Head of Marketing** constructs an integrated marketing communications plan. The Marketing Plan describes the various marketing activities to be undertaken to inform the Ultradata staff and customers about the project and its purpose such as innovation driven or a mandated obligation.

The Marketing Plan is reviewed by the **Chief Executive Officer** or their delegate**.**

Integrated Marketing Communications

All product collateral is developed under the direction of the **Head of Marketing.**
The integrated marketing communications may include some or all of the following items:

- Insight Segment/Article
- Websites of the organisation
- Digital Marketing Campaign
- Marketing collateral for Sales Teams and Client Engagement Teams
- Social Media campaign
- Product eBrochures
- Product Profile Fact Sheet
- Client Conference Presentation

All marketing information is reviewed by the Chief Executive Officer or their delegate.

Pricing Terms

Using the Pricing Terms Template, the **Pricing Team delegate** develops a Pricing Terms Document, which is reviewed and signed off by the **Executive Pricing Group**.

Branding and IP Protection

The **Chief Executive Officer or their delegate** and the **Head of Marketing** work together to identify any branding or IP Protection requirements for the project.

The **Head of Marketing** undertakes any activities relating to branding and IP Protection.

Product Release Recommendation

Using the Product Release Recommendation Template throughout the whole Product Management Life Cycle of the product the CEO, or his delegate, signs to approve the Product Release Recommendation including releases, locales and other key information.

The document then follows the product through each phase for sign off by each team as their responsibilities are executed and passed on to the team who are undertaking the next phase in the cycle.

Review for Approval

The Executive initiating the product reviews the budgets and functional specifications and provides the information to the Product Investment Committee together with the Product Release Recommendations for agreed delivery outcomes for the product.

The **Product Investment Committee** reviews the details and either gives approval for continuation of the project or end the project. If the project is large scale approval of budget and functionality may be sought from the Ultradata Board.

Architecture Phase

The Solution Architecture document describes the key components of a software solution, and the connections between these components. It describes the technology used in each component and the technology in use on the connections between components. Components include processing components (i.e. software) and storage components (i.e. data at rest) while connections describe the movement of data between components or to/from external parties.

The Solution Architecture must describe any factors that may affect the security, performance, reliability or manageability of the solution and how these concerns are addressed within the solution design.

Solution Preview

The objective of this preview is to identify, prior to detailed technical design, any aspects of the proposed solution that will require special consideration.

When the proposed solution intends to make use of any technology that is not already in use within the Ultracs Ecosystem, or uses such technology is used in a novel way, then this is a strong indication that special consideration of the solution architecture is required.

Other indicators of special consideration include externally mandated performance requirements, high volume transaction activity, large data volume ingress, egress or storage, 3rd party integrations, the use of novel (to Ultracs) communication protocols and the need to create new data stores outside the Ultracs core banking system.

The Solution Preview is to be initiated by the Senior Manager Product Development as early as possible in the preparation of the technical specification and must include the submission of a draft Solution Architecture document that describes the proposed solution architecture.

Solution Architecture Changes

Any changes to the previewed solution architecture that have become apparent during the preparation of the Technical Specification must be advised to Architecture. Another Solution Preview may be appropriate, and the draft Solution Architecture document must be updated and provided by or reviewed by Architecture, including updated Architecture Diagram and additional requirements on hardware or other new technologies for the changes.

Solution Architecture Review

The objective of the review is to confirm with the Senior Manager Product Development that the Solution Architecture document accurately reflects the solution that is to be built.

Acceptance by Architecture of the Solution Architecture will be confirmed by sign-off of the Architecture Review step of the Product Release Recommendation by the Head of Architecture.

Build Phase (Build and test the system, create all supporting materials)

Project Release Recommendation

Using the Project Release Recommendation Template throughout the Build phase of the product development the **Head of Development** updates the Project Release Recommendation document. This document is used in the final signoff process to determine if a product is complete and ready for launching.

Project Development Plan

Using the Project Development Plan Template, the **Senior Manager Development or their delegate** creates a Project Development Plan which is used continually through the project lifecycle to monitor budgets and delivery dates.

Technical Specification

Using the signed off Functional Specification document and after undertaking a thorough investigation of the appropriate systems one or more **Senior Analyst Programmer/s** will use the Technical Specification Template to develop a Technical Specification document.

The Technical Specification document details at a technical level the programming required for the project. These technical details may be split into multiple documents for ease of use.

The Technical Specification/s is reviewed by a **Senior Analyst Programmer** and any other relevant technical staff, as required by the **Senior Manager Development or their delegate**.

Infrastructure Setup

The Senior Manager Development and their **Project team** with assistance from **Internal Support** will construct the required development and testing environments.

Programming

Using the Source Control System (SC) utility the **Programmer** books out the appropriate programs they will be changing.

Using mod marks which adhere to the Mod Marking Standards, the **Programmer** makes the changes to the program as described in the Technical Specification.

All program changes must adhere to the Programming Standards.

Unit Testing

As a minimum, unit testing to be performed by the **Analyst Programmer/Senior Analyst Programmer** who made the programming changes. The **Senior Manager Development** may arrange to have unit testing undertaken by a peer on the project team, depending on time constraints and complexity of the project.

Program Review

Once all programming and unit testing for a module has been completed the **Analyst Programmer** hands over the programs to be reviewed to another programmer. The process to be followed for reviewing is described in the Code Review Process.

Installation Guide, Pre-Installation Questionnaire and Site Implementation Guide

Using the Installation Guide Template, the **Senior Analyst Programmer** creates a draft Installation Guide. The Installation Guide describes the steps to be undertaken to install the system.

If there are installation options which require a customer's input, using the Pre-Installation Questionnaire Template the **Senior Analyst Programmer** creates a draft Pre-Installation Questionnaire. The Pre-Installation Questionnaire describes the options available at installation it is provided to the customer prior to installation to determine their installation requirements.

The Installation Guide is reviewed by a **Consulting Services Team member**.

The Installation Guide is also 'tested' as part of the Project testing and QA Testing Phase. At the same time as creating the Installation Guide, the **Senior Analyst Programmer** uses the Site Implementation Guide Template to create a Site Implementation Guide. This document has two functions, firstly to provide information to the site on the impact of the implementation, such as new files which will be created, new programs (which needs to be checked post installation for security access) and key processing changes. The second function is to request information from the site, which is required for the installation, an installation questionnaire.

The Site Implementation Guide is reviewed by the **Business Analyst** and **Senior Manager Development or their delegate**.

Project System Testing (optional)

Using the Test Plan Template, the **Senior Analyst Programmer** develops a Project System Test Plan. The Project System Test plan is used to test the system against the technical specification as well as the functionality as defined in the Functional Specification. The testing may also include testing of infrastructure, such as testing against a variety of versions of operating systems or hardware.

The Project System Test Plan is reviewed by the **Senior Manager Development or their delegate**.

After review, the Project System Test plan is performed by project team members as assigned by the **Senior Manager Development**.

If issues are identified during the testing the **Senior Analyst Programmer** acting as a **Testing Analyst** uses case management system in Epicor to log a case, then resolved, unit tested (by the programmer), reviewed and submitted for QA testing again.

Scalability, Regression and Security Testing (Optional)

Using the Test Plan Template, the **Senior Analyst Programmer** develops a Test Plan. The Scalability/Regression or Security Test plan tests the system for specific concerns.
The Test Plan is reviewed by the **Senior Manager Development** and/or other relevant technical staff prior to being performed.

QA Testing Approach

After thorough analysis of the various project documents, Business Requirements, Functional and Technical Specifications, the QA **Testing Analyst** in conjunction with the **QA Manager**, using a Testing Approach Template, creates a Testing Approach document which will explain the approach to the QA Testing, the scope of the testing, environment to be used, release to be tested etc.

The Testing Approach Document is reviewed by the **Senior Manager Development** and the Design **Business Analyst**.

QA Test Plan

Using the Test Plan Template, the QA **Testing Analyst** in conjunction with the **QA Manager** develops a QA Test Plan. The QA Test plan tests the system against the Functional Specification requirements and may include some regression testing.

The QA Test Plan is reviewed by the **Senior Manager Development** and Design **Business Analyst** prior to being performed.

QA Testing

Once the Project System Testing is completed the **Senior Manager Development or QA Manager** will arrange for a **Consulting Services – Project Manager** to be assigned to the QA Testing Implementation. This will be done in conjunction with the **Consulting Services - Implementations & Applications Managers**.

The QA Testing Implementation is undertaken by the following staff (as deemed appropriate):

- Consulting Services - Project Manager

- Consulting Services - Channel Installer Team Leader and Channel Installer
- Consulting Services - Application Integration Team Leader and Host Installer
- Product Development Project Manager

Prior to the **QA Manager** assigning the testing to a **Testing Analyst to** commence testing, the **Consulting Services - Project Manager** will arrange for the installation and setup of the QA Testing test environment (i.e. QA Testing installation process).

This QA Testing installation process will provide a test of the installation process (including a validation of the installation material and guide notes). The staff involved must review and follow the installation material and guide notes as documented.

This QA Testing installation process may result in the installation material and guide notes being changed to accommodate a successful installation process.

If issues are identified during the QA Testing installation process, it will be placed on "hold" until the issues are resolved. The **Consulting Services – Project Manager** would use the Epicor case system to log issues, then resolved, unit tested (by the programmer), reviewed and submitted for installation again. At this stage the QA Testing installation process can resume.

This may require a complete restart of the QA Testing installation process depending on the particular issues raised.

Any changes to the installation material or guide notes resulting from issues identified during the QA Testing installation process must be submitted by the **Consulting Services – Project Manager** to the designated **Senior Manager Development or their delegate** by loading a call into the Epicor Case system.

Once the QA Testing installation process is complete, the **Consulting Services - Project Manager** will notify the **QA Manager** that the QA Testing installation process is complete and that testing can commence.

The **QA Manager** will then assign a QA **Testing Analyst** to perform the testing. Using the reviewed QA Test Plan the QA **Testing Analyst** performs QA Testing.
If issues are identified during the testing the QA **Testing Analyst** is logged in the Epicor system as an issue, then resolved, unit tested (by the programmer), reviewed and submitted for QA testing again.

QA Finalisation

The QA Manager to provide and advise to the remaining teams in the PMLC process when QA is complete. The definition of completion covers the following situations;

- where the full test plan has been completed and signed off;
- where the CEO has approved to deliver the product to early adopters when QA have not yet completed testing (supporting approval documentation is required);
- where the CEO has approved to deliver the product to early adopters following approval for QA to bypass testing by the CEO (supporting approval documentation is required).

User Documentation Plan

After thorough analysis of the various project documents, Business Requirements, Functional and Technical Specifications, the **Technical Writer**, using the Documentation Plan Template, creates a Documentation Plan to explain the approach which will be taken to create/update user documentation for the project, including the format of outputs. The plan also includes an estimate for all User Documentation activities.

The Documentation Plan is reviewed by the **Senior Manager Design or Senior Manager Innovation** and Design **Business Analyst** prior to work commencing on the documentation.

Deliver Release

Once all product development activities including system testing have been successfully completed, the **Senior Manager Development** will arrange for programs, upgrade items and project documentation to be packaged together for delivery to the QA team.

Using the Client Software Update template, the **Senior Manager Development** creates a Client Software Update describing the new product or functionality. The Client Software Update is then produced by the Technical Writer.

User Documentation

Using the User Documentation Template, the **Technical Writer** develops a new User Manual or updates the required existing manual/s for the project.

The new/updated User Manual is reviewed by a product expert (either Design Business Analyst, Senior Analyst Programmer) and a technical expert developer as assigned by the **Senior Manager Development**.

Pricing

Provide information to the Pricing Committee to initiate Early Adopter selection.
The following information is provided to enable this process:

- Project data on cost to be issued to the Chief Business Officer and Pricing nominee to enable the Licence and Maintenance cost analysis to be presented to the Pricing Committee.
- Host program and Front End program data is issued to the General Manager Consulting Services and Technical Delivery Manager to enable the T&M consulting effort analysis to be presented to the Pricing Committee.

Issue the Head of Marketing Manager, Client Engagement Team Manager and Consulting Services team with the following documents to trigger the early adopter selection process:

- Release Notes.
- product Release Recommendation Summary.

Early Adopter Selection

Early Adopter Testing is an optional activity for any product development project. A decision is made at the time of approving the project about whether this is required.

The **Head of Marketing Manager** will coordinate an Early Adopter selection meeting. This meeting will identify potential clients to early adopt new product before general release based on specific product usage requirements and site history.

Once a final Early Adopter Client has been identified the **Senior Manager Client Engagement** will organise the proposal and setting expectations with the client. Once a quote has been accepted, the Consulting Services Project Manager will organise installation and testing.

Upgrade Master and Demonstration Accounts

A review is required for each product and release to determine update to the master accounts and all demonstration accounts created from the master account. Product Design will conduct the review and provide recommendations of products to be updated for approval by CEO.

Delivery and installation of any approved updates to demonstration accounts and other equipment to be managed by Consulting Services through standard ordering process.

Technical Training Material

Using a Technical Training Manual Template and other resources the **Senior Analyst Programmer** develops appropriate Technical Training material to describe the project. This information may be developed in a presentation style via PowerPoint with a supporting manual or a format appropriate to the subject matter.

The Technical Training material is reviewed and signed off by the **Senior Manager Development or their delegate**.

Deliver Technical training

Using the Product Session Template, the Project Manager organises Technical Training sessions for a maximum of 12 per session.

Using the Technical Training Manual created in the Build Phase the **Senior Manager Development** or a delegated member of the project team delivers Technical Training to **Consulting Services, Support** and other **Product Development staff**.

Deliver Functional Overview

Using the Product Session Template, the Senior Manager Design or Senior Manager Innovation organises Functional Training sessions for a maximum of 12 per session.

Using the Marketing material, the **Senior Manager Design or Senior Manager Innovation** or a delegated member of the project team delivers Functional Training to **Consulting Services, Support** and other **Product Development staff** and all general staff.

Early Adopter Testing (Optional)

After an Early Adopter has been selected an agreement and proposal outlining the scope of the early adopter functionality and timelines for completion is confirmed by the client.

A **Consulting Services - Project Manager** is assigned to the Early Adopter Implementation. This will be done in conjunction with the **Consulting Services - Implementations & Applications Managers**.

The Early Adopter Implementation is undertaken by the following staff (as deemed appropriate):

- Consulting Services - Project Manager
- Consulting Services - Channel Installer
- Consulting Services Team - Host Installer

As part of the test of the installation process, the Consulting Services – Project Manager may choose to perform an installation test to another environment prior to the early adopter installation process. This request would need to be agreed with the CEO and budget approved for the additional step.

Prior to an Early Adopter Client commencing testing, the **Consulting Services - Project Manager** will arrange for the installation and setup of the Early Adopter test environment (i.e. Early Adopter installation process).

This Early Adopter installation process will provide a test of the installation process (including a validation of the installation material and guide notes) specific to the Early Adopter Client site. The staff involved must review and follow the installation material and guide notes as documented.

This Early Adopter installation process may result in the installation material and guide notes being changed to accommodate a successful installation process. If issues are identified during the Early Adopter installation process, it will be placed on "hold" until the issues are resolved. The **Consulting Services – Project Manager** would use the Epicor Case system.

The issue is then resolved, unit tested (by the programmer), reviewed and submitted for installation again. At this stage the Early Adopter installation process can resume. This may require a complete restart of the Early Adopter installation process depending on the particular issues raised.

Any changes to the installation material or guide notes resulting from issues identified during the Early Adopter installation process must be submitted by the **Consulting Services – Project Manager** to the Senior Manager Development or their delegate.

Once the Early Adopter installation process is complete, the **Consulting Services - Project Manager** will arrange for appropriate training to be provided to the Early Adopter Client and will organise for the Early Adopter Client to commence testing.

The Early Adopter Client will also be supplied with a copy of the reviewed User Documentation prior to installation. This manual is required to be reviewed and signed off along with the software.

Early Adopter Testing may be undertaken in a site's test environment or live environment. Although preference is that Early Adopter Testing is conducted in the test environment first.

If issues are identified during the testing the Early Adopter site logs cases to the Epicor Case system. The issue is then resolved, unit tested (by the programmer), reviewed and submitted for testing again. If issues are raised during testing that relate to the design of the product or the user manual, and not covered by the proposal scope, then the **Senior Manager Design or Senior Manager Innovation** to resolve and update in Epicor.

It is the responsibility of **Consulting Services - Project Manager** to manage the issues raised by the Early Adopter site and ensure that cases are reviewed for installation, bugs, design decisions. If bugs requiring fixes, then the Consulting Services project team to capture logs, screen shots, any other information that will assist in the speedy resolution of the issue.

The Early Adopter will be asked to complete then sign off the Early Adopter Proposal at the conclusion of testing, including functionality as stated, user manuals and Site Implementation Guides as provided. Facilitation of the sign off by the early adopter is the responsibility of the General Manager Consulting Services.

User Training Materials

Depending on the content of the project the training requirement may be a whole new training course, changes to an existing course or added module for an existing course. Using the Session Plan Template, the **Training Coordinator** assigned to the project will develop a new or updated Session plan appropriate to the project with key decisions related to using digital tools as the preference and all locales catered for.

The Session Plan document describes the key objectives, timeframes and actions to be undertaken in a training plan. It is to be written to complement but not replicate/replace the associated User Manual.

The new or updated Session plan is to be reviewed by the Design **Business Analyst**. Also using the Training Workbook Template, the **Training Coordinator** assigned to the project will develop a new or updated Workbook appropriate to the project.

The new or updated Workbook is to be reviewed by the Design **Business Analyst**. The Workbook sets out a number of exercises to be undertaken in a training session. It is to be written to compliment but not replicate/replace the user Manual.

The **Training Coordinator** will run product training for **Support Services, Consulting Services, Client Engagement Team** prior to initiating the client facing training.

Board Sign Off

The final release of a new software module, product or release requires sign off from the Ultradata Board. Depending on the size, scope and nature of the project, the Board may delegate the sign off authority to the CEO as required.

Where Board sign off is required, the requirements for that sign off need to be determined, and will be done on a case by case basis. The completed Project Release document is used to review the project outputs, at a minimum the review is expected to include:

- Key business objectives of the project
- Project overview, how was the project conducted, major players etc.
- Project budget, is it on time and on budget?
- High level product demonstration of the key functionality
- High level checklist that all components are completed

Handover Phase (Handover project output to various teams)

Internal Launch

Using the collateral developed in the Build Phase the **Head of Marketing Manager** delivers an internal launch of the project to all internal staff.

Management of Integrated Marketing Communication Activities

The **Head of Marketing** distributes the final approved versions of the marketing collateral into the shared folder, for use by the Sales and Client Engagement teams. The collateral delivered includes:

- Insight Segment/Article
- Websites of the organisation
- Digital Marketing Campaign
- Marketing collateral for Sales Teams and Client Engagement Teams
- Social Media campaign
- Product eBrochures
- Product Profile
- Client Conference Presentation
- Internal Launch presentations/documentation

The Head of Marketing would conduct a presentation with the Sales and Client Engagement Teamon any relevant products and campaigns.

Build Final Release

Once the project has attained final sign off from the Board all programs are booked back in and a General Availability version created. The **Senior Manager Development** then allocates a resource to build the final release. The Senior Manager Development also gathers the final versions of all relevant project documents to create a Project kit, which will be kept in an appropriate location so Consulting Services, Support and Development staff can access the information.

The Project Kit includes:

- Architecture Design Document (optional)
- Installation Guide and Questionnaire
- Technical Training Manual
- Project Code, including UPGRADE item
- Client Software Update

Client Launch

Using the updates Sales/Demo equipment and marketing presentations the **Head of Marketing** organises and delivers an appropriate launch of the project/product to clients.

Implementation Phase (Product completed and installed in customer sites)

Implement on site

If an early adopter process has not been used for a product, then using their standard procedures the **Consulting Services team**, with assistance from the project **Product Development team**, undertake the first site implementation.

Any issues found in this implementation are loaded in the Epicor Case system and allocated to an appropriate **Product Development Team Member** for resolution.

This process for resolution of issues will continue until Consulting Services, Support and Product Development agree to hand the product over to the normal Support processes.

Project Handover to Support Services

A well-planned handover of the product from delivery implementation to BAU (business as usual) support is key to ensuring a good client experience beyond the project phase.

The Consulting Services Project Manager will review and complete the 'Support Handover Process' document that primarily consists of the following -

1) Handover Checklist
2) Actions required for transition to support along with the timelines
3) Confirmation for modules testing
4) Project team info and contacts of key project resources
5) List of outstanding cases

This handover document is to be completed by the Consulting Services Project Manager and sent to the Support group distribution list (SupportGroup@ultradata.com.au) no later than 1 week post Production implementation of the system. The document is placed on the central Project Management directory.

The Consulting Services Project Manager will also set up a Support Handover meeting with the Support Team Leads and Senior Manager to discuss any feedback on the handover document and close any pending actions prior to the completion of Project Support phase.

Termination Phase (Wrap up project and review outcomes)

Review Product Take-up

In an agreed timeframe following the launch of the project, the **Head of Marketing** will undertake a review of the take-up of the product. A report will be produced and submitted to the Product Investment Committee and Executive Management team for consideration.

Review all issue logs

The **Senior Manager Development or their delegate** will review all issue logs and program review comments to identify possible areas for improvement in staff skills and processes. Items relating the specific staff members will be highlighted in staff project appraisals. Improvement to processes will be escalated to the responsible area manager.

Post-Project Review

A member of the Leadership team or their delegate **will** conduct focus groups discussions with all staff involved in the project. The discussions will seek to identify high and low points in the project the discussions will be directed at the process not the people.
Following the discussions, the **Leadership Team representative** will create a Project Review document, which will be submitted to the **Executive Management team.**

R&D Tax Concession Claim Form

The **Chief Business Officer** reviews the R&D Claim form to determine if the activities undertaken during the project are eligible to claim for a R&D Tax Concession. If the project is appropriate, the Chief Business Officer updates the R&D Tax Concession Claim commenced earlier in the project.

Project Appraisals

Using a set of Project Appraisal pro-forma templates (one for each project position), the **Senior Manager Development** will assemble an evaluation on the staff members' participation in the project based on their adherence to estimates, issues arising, rework and quality of output.

The **Senior Manager Development** will conduct a one-on-one interview with each **staff member** to deliver this evaluation.

The final agreed and dual signed Project Appraisal will be submitted to the staff members' line manager for inclusion in the yearly appraisal.