



**PROJECT DELIVERY CHARTER:  
PROJECT PHASES, DELIVERABLES, ROLES &  
RESPONSIBILITIES**

## 1. Purpose

This document is intended to illustrate Cooper Software’s client engagement process, from project conception to closure. The document highlights Cooper Software’s responsibilities and deliverables as well as Client responsibilities.

The responsibilities and deliverables are built around Cooper Software’s project delivery framework (QMP7300), commencing with pre-sales and progressing through project Phase 1 (Scoping) to Phase 6 (Project Close). At each stage, the inputs and outputs from both Cooper Software and the client are shown.

From project phase 1 (Scoping) onwards, a range of project controls are implemented and maintained by Cooper Software, including the project plan and RAID Log. These are regularly issued to clients throughout the project lifecycle to ensure agreement and understanding on project progress and next steps.

This document shall be reviewed no later than at Phase 1, and at future dates where deemed necessary or beneficial.

## 2. Client Engagement Process Flow

Cooper Software’s engagement process is shown in Figure 1, below.

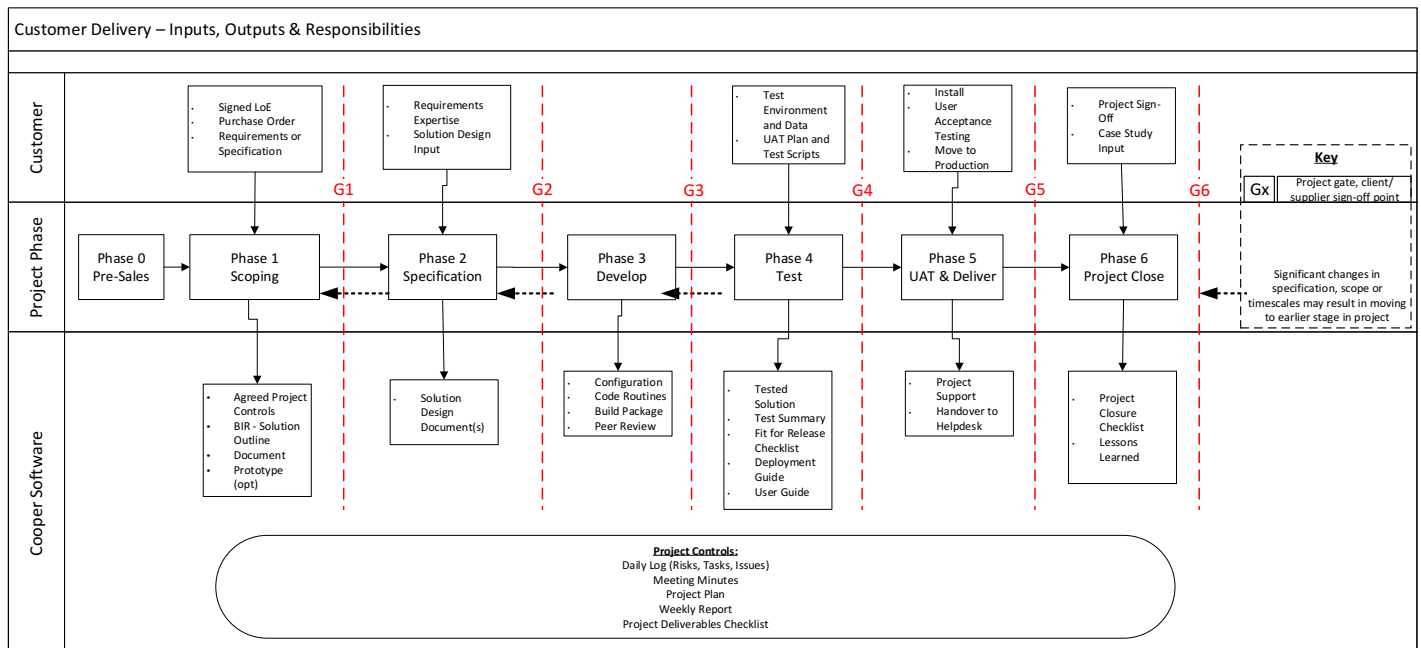


Figure 1 – Project Delivery Process

## 3. Project Phases

### General notes

- Business requirements, a draft Specification, timescales and required project controls will be agreed between Cooper Software and client during Phase 1 Scoping.
- Alignment in understanding of specification, scope and timescales will be sought during each project phase-gate review.
- Cooper Software will openly communicate project progress against the project plan and against the agreed Letter of Engagement on a time and materials basis.
- Both Cooper Software and the client should raise any issues in relation to project progress ASAP.
- Significant changes in specification, scope or timescales may result in moving to an earlier stage of project development and/or an amended Letter of Engagement
  - Example: if a client’s required specification changes significantly during the Develop or Test phases, project gates G3 or G4 will not be passed and instead the project may move back to the Specification phase. At this

point, a new specification, budget and/or project timescale will be agreed before passing project gate G2 and moving back into Development.

#### *Phase 0 – Pre-sales*

- Lead-in to defined phases of Project Delivery Charter

#### *Phase 1 – Scoping*

- Cooper Software may embark on a Business Information Review (BIR) with the client to understand the operation of the client's business and capture information which can be used as a basis for defining the solution.
- The Solution Architect will review the business requirements and operating practices in order to propose a future-state operating model as a Solution Outline. This bounds the proposed solution and Cooper Software and may agree commercial terms with the client before, during or after this phase, depending on the nature of the engagement.
- Project kick-off occurs during the Scoping phase
- Project Gate G1 must be passed to exit Scoping

#### *Phase 2 – Specification*

- The client's requirements are fully understood by the project team and a detailed Solution Design Document is developed.
- Upon completion of the specification phase timelines, project budget and scope may need to be reviewed in the case of any major changes.
- Project Gate G2 must be passed to exit Specification.

#### *Phase 3 – Develop*

- The solution is configured and developed in accordance with the Specification.
- Project gate G3 must be passed to exit Develop.

#### *Phase 4 – Test*

- The solution is tested against the customer's test plan and test environment.
- Any failures from testing may result in a return to Phase 3 Develop or Phase 2 Specification.
- Project Gate G4 must be passed to exit Test

#### *Phase 5 – User Acceptance Testing (UAT) & Deliver*

- The solution will be delivered to the customer for User Acceptance Testing.
- Feedback resulting in minor changes and/or change requests are agreed with the client and implemented where appropriate.
- The project transitions into a support phase.
- Project Gate G5 must be passed to exit UAT & Deliver

#### *Phase 6 – Project Close*

- The project enters the continuous improvement phase, with lessons learned and project analysis carried out.
- Project Gate G6 must be passed to formally close the project.

## **4. Responsibilities**

#### Cooper Software:

- Provide templates and documents for Client completion and/or sign-off
- Arrange project gate meetings and standard project meetings
- Communicate points of contacts and escalation
- Provide deliverables in timely manner

#### Client:

- Assign appropriate resource to the project
- Assign point(s) of contact and escalation
- Provide deliverables in timely manner to ensure specification, development, test and delivery can proceed smoothly
- Sign-off project phases in a timely manner