

# Project Lifecycle Process

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created by:  
**CLARITY**

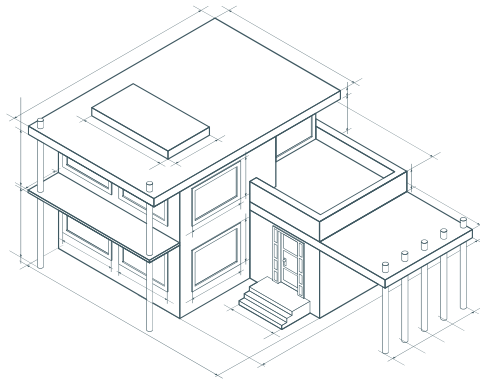
division:  
**SERVICE & ECOMMERCE**

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**2017**



PHASE 1  
**DISCOVERY**

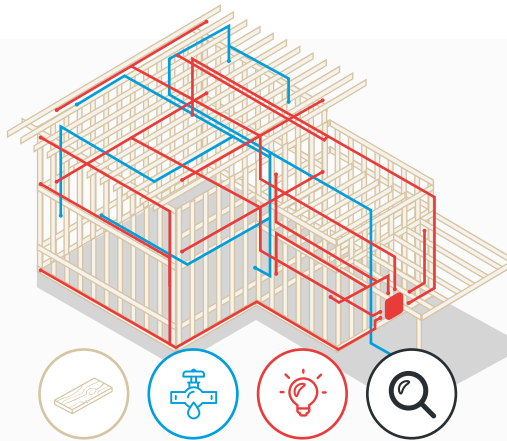
**I. KICKOFF**  
WEB STRATEGY



**II. PLANNING**  
NEEDS ANALYSIS  
TECHNICAL DISCOVERY  
CREATE USER STORIES  
WIRE FRAMING  
RE-ESTIMATES

PHASE 2  
**DEVELOPMENT**

**III. DEVELOPMENT**  
SPRINT PLANNING  
DEVELOPMENT  
BUILD TESTING  
REVIEW  
BUG FIXES  
CLIENT ACCEPTANCE



**IV. QA**  
FINAL VALIDATION  
BUG FIXES  
USER STORIES  
USER ACCEPTANCE TESTING

SIMPLE

CHANGE REQUESTS

COMPLEX

SIMPLE

DESIGN

COMPLEX

PHASE 3  
**LAUNCH**

**V. PRODUCTION**  
CLIENT ACCEPTANCE  
PUSH TO PRODUCTION  
VALIDATE



**+ MAINTENANCE**  
MAINTENANCE  
UPDATES  
ENHANCEMENTS  
AUDITS



# THE CLARITY LIFECYCLE PROCESS

*Every Clarity project is unique. They range from small marketing sites, like ones for Dentists or Entrepreneurs to mobile applications and highly custom B2B marketplaces with back-office integrations, like our 370-franchise marketplace (370 unique, yet connected franchise sites across 77 countries) we built for New Horizons Computer Learning Centers. With over a decade of experience building more than 1,200 projects, we've modified and honed our process, so that it can easily flex to service any type of project.*

## Discovery & Design Phase

Each new project begins with discovery and design. This phase centers around the client's business needs and goals for the project. Clarity's staff works closely with you to discuss these goals, offering experience and ideas for the best ways to achieve them. Some can be done through new technology, automating business processes, integrating business systems, or custom UI / UX (user interface, user experience) while others may need updated text, graphics, SEO / CRO (search engine optimization, conversion rate optimization) and videos. The output of this phase is two main documents (Project Approach & Functional Design, Technical Approach), as well as any needed wireframes that outline custom workflow or business logic. For marketing sites, this phase also include design mockups. With these resources, the team will review the original sales estimates (generated by taking the averages of many of similar completed projects) and ensuring that they are accurate to the newly completed technical and design requirements. If needed, adjustments to the estimates will be documented for you to review and approve before development begins.

## Development Phase

Clarity adjusts its development process to the project. For smaller projects, the Waterfall Method is used, since all the features can easily be designed, built and tested in a relatively short timeframe. This is usually reserved for marketing sites, where simple features like blogs, calendars, events and traditional content are needed.

For larger or more complex projects, Clarity uses Agile development. 2-week Sprints are assigned tasks, where the development and QA of each Sprint is done within the 2 weeks. The Project Manager will meet to review the Sprint results with you before moving on to each subsequent Sprint. For those wanting to know more details about the process, Clarity holds multiple internal SCRUM meetings each week, and more like Agile Kanban development, each developer is velocity or capacity driven, more than SCRUM. This means that if a developer is assigned to work on your project for 20 hours each week, if they were to finish their tasks within a week, they can move onto additional tasks, thereby speeding up the project, rather than waiting until the Sprint "officially" ends. This flexibility also allows us to more easily handle change requests that commonly happen throughout the project.



## Change Management / Change Requests

The change request process is designed to allow you the flexibility of making changes during your project, but to first understand the impact of each change to the project. Each change order is first documented with any design work, any UI/UX to build, custom coding and additional testing needed. Once documented, Clarity will provide a cost estimate to complete the change. Next, the Project Manager will assess the affect that the change and cost will have on the budget and project timeline. Finally, with the estimate and assessment, you will be able to decide if the change gets pulled into the project and assigned to an upcoming Sprint, or if it is slated as a post-launch enhancement.

## Testing / Quality Assurance Phase

The testing phase of each project is matched to the project. For a waterfall approach or marketing site, the testing is done at the end of the project. Smaller projects may or may not require a full Test Plan. As the client, once final testing is complete, you will be provided time for your own testing and approval, which is called User Acceptance Testing. After Clarity fixes any final discovered issues, you will approve the project to push to production or take the site live.

For Agile projects, testing is done throughout. As each developer finishes their tasks in a Sprint, they will perform cursory testing to ensure that the feature or function itself, works as designed. Each developer will then document, as a testing scenario, how the feature or function should be tested in order to ensure validation. These testing scenarios are then gathered by the QA Department, where they create automated testing scripts in their testing framework. This ensures that as the developers add more features and custom code, their previously submitted work will go through regression testing to make sure there are no conflicts introduced.

## Production

Taking a site live or pushing it to production is the final step of building your site. The Technical Approach document specifies where and how the site will be configured in production. Once done, your project will automatically move either into another development phase (if a Phase II or Enhancement Phase was planned), or maintenance.

## Maintenance

Clarity provides a simple process for maintenance. For enhancements or new features, it's very similar to a change request, which goes through a cursory design, estimate, assessment and approval. For simple edits or small items (i.e. adding a blog, live chat or form), these can be done with a quick estimate and approval. There are also proactive maintenance items, such as: performance audits, SEO audits, security audits, update reviews and more.

As a Clarity client, you have multiple options for maintenance. The first, as described above, is a simple request and estimate process that doesn't cost you anything extra, other than the hours for the work performed. Since the requests and estimates are free, they may take some time to be responded to or to be worked on. For those clients who have more critical needs, Clarity offers an SLA (Service Level Agreement), which includes up to 24 x 7, 365 days a year access, with guaranteed response times for all urgent requests.



## GLOSSARY OF TERMS

### Agile Development

Agile development is a phrase used to describe methodologies for incremental software development. It is an alternative to traditional project management methods (Waterfall).

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### Kanban Development

Kanban is a method for managing the development workload, which balances demands for work with the available capacity for new work.

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### Project Approach & Functional Design

This document is the project's main document. It contains a project overview, covers risks and assumptions, change requests, communications, project timeline, individual proposal line items, business workflows, as well as either wireframes or mockups of the user interface (each page or workflow).

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### Service Level Agreement

Some clients have sites that are critical in nature (i.e. hospitals, government entities, public services, etc.). Clarity offers 2 levels of service maintenance which provides the client with guaranteed response times, either during normal business hours or 24 x 7, 365 days a year. These agreements have a monthly fee associated with the level of service and the number of client contacts able to use the service, plus their hourly rate for any work performed for the "service."

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### Technical Approach

The Technical Approach document is designed as a roadmap for the developers. It contains all of the logic changes to our core platform, schema updates, class diagram, folder structure, business flow diagrams, used libraries, risk areas and more. It also looks at the performance and security needs of the site for production, deciding things like hosting, fail-over, load balancing, redundancy, etc.

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### Test Plan

The Test Plan is normally built at the completion of the Discovery & Design phase, after all the technical specs and workflow logic has been defined. The QA department documents the use cases, whereby the site can be properly tested, running through all the core and custom functionality of the site.

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### UI / UX

User Interface (UI) design basically focuses on improving the overall presentation, look, feel and interactivity of the product. User Experience (UX) is the area of web design wherein the professional works on enhancing the whole experience that a user has with a company, its products or services.



**User Acceptance Testing**

User acceptance testing (UAT) is the last phase of the software testing process. During UAT, the client gets to test the software to make sure it can handle required tasks in real-world scenarios, according to their specifications.

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**Waterfall Method**

The waterfall model is a sequential (non-iterative) design process, used in software development processes, in which progress is seen as flowing steadily downwards (like a waterfall) through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance.

