

PROJECT ON-BOARDING WORKFLOW

Step 1



PROJECT REQUEST

Project Request initiated by client via Lariat/Email/Phone Call

Acknowledge & record request in Lariat

Step 2



DISCOVERY

Setup discovery meeting to identify high-level scope

Introduce our process if needed

Complete Project intake details and obtain documented requirements and scope from client

Facilitate Business Analysis as needed

Assess feasibility of Project

Step 3



ASSESS SCOPE

Setup detailed assessment meeting with client

Collect requirements: functional, technical, testing, security, resources and governance

Discuss high-level design options and integrations

Discuss dependencies

Identify team roles and responsibilities

Step 4



ESTIMATE

Internal discussions

Estimate write up

Send Estimate to client

Step 5



PLANNING (TIMELINE AND FUNDING)

If Estimate is approved

Negotiate timeline: phases, milestones, start and finish dates

Send formal Project Authorization for signature

Collect Initial Payment per payment terms

Prioritize project, allocate team resources and move into production queue

Step 6



FORMALLY MOVE INTO PRODUCTION/ DEVELOPMENT WORKFLOW



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