## OE-PM-Project Lifecycle

<table>
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<tr>
<th>Initiation Phase</th>
<th>Planning Phase</th>
<th>Execution Phase</th>
<th>Closure Phase</th>
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<tbody>
<tr>
<td>Project Approval</td>
<td>Definition &amp; Analysis</td>
<td>Design</td>
<td>Planning</td>
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<tr>
<td></td>
<td></td>
<td>Build</td>
<td>Test</td>
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<td>Deploy</td>
<td>Close</td>
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</tbody>
</table>

Denotes a Toll Gate
OE-PM Initiation Phase

**Step**
- SVP Approved Proposal Submitted
- Review Submission Form and Determine Next Steps
- Prepare Presentation for the Business Line Proposed Project Portfolio
- Executive Authorization
- Feedback
- Enterprise Level Notification
- Proposal Requires Enterprise Level Review?
- Proposals Prioritized
- Proposal Requires Funding?
- Outside of Budget Season
- Proposal Terminated
- Capital Budget Process
- Approved
- Proposal Becomes a Project
- Not Approved
- Proposal Terminated
- During Budget Season
- Proposal Terminated
- Approved
- Proposal Becomes a Project
- Unbudgeted Approval Process
- Approved
- Proposal Becomes a Project
- Not Approved
- Proposal Terminated

**Responsible Party**
- Requestor (i.e. Product Mgr)
- PMO
- PMO, DFO, & Business Owners/Project Sponsors
- Group Executive Mgmt
- Business Partners
- PMO & Group Executive Mgmt
- PMO, DFO, & Business Owners/Project Sponsors
- Corporate Finance
- PMO

**Artifact**
- Submission Form
- Initiation Phase Business Case
- Submission Form & Initiation Phase Business Case
- Prioritization Ranking
- APEX System Entry
- Prioritization Document TBD
OE-PM Planning Phase — Planning Sub-Phase

Step
- Update Project Sizing Matrix and Identify Project Deliverables
- Identify Resource Requirements
- Create Functional Specs
- Develop Execution Design Schedule
- Complete Planning Business Case
- Create Measurement Plan
- Complete Project Management Plan
- Distribute Planning Phase Closure Survey
- Complete Planning Tell-Gate
- Execute Phase Kick-Off Meeting
- Enter Design Subphase

Responsible Party
- Project Manager
- Project Manager
- Business Analyst
- Project Manager
- Project Manager
- Business Owner
- Project Manager
- Project Manager
- Project Manager
- Project Manager

Artifact
- Sizing Matrix & Deliverables Matrix
- Resource Plan (MS Project) & RACI Document
- Functional Specs
- Detailed Project Schedule (MS Project) (through Design)
- Planning Business Case
- Measurement Plan
- Project Management Plan (PMP)
- Planning Phase Closure Survey
- Planning Tell-Gate
- Project Management Plan
OE- PM Execution Phase – Design Sub-Phase – Part 1

Step

- Execute Contract
- Complete CIP Form
- Create Purchase Request
- Deliver Functional Specs to Technology Partner
- Complete Technical Specs
- Deliver Technical Specs to Technology Partner
- Collect vendor documentation and Network and System Diagrams
- Order Equipment (if applicable)
- Create Test Plan

Design Subphase Continued

Responsible Party

- Business Owner
- Project Manager
- Project Manager
- Business Analyst
- Party Responsible for Development
- Party Responsible for Development
- Project Manager
- Project Manager
- UAT Manager

Artifact

- Contract & SOW
- CIP Form
- CPRS
- Technical Design Specs Document
- Vendor Design and System docs
- Network and Systems Diagram
- CPRS
- Test Plan
OE-PM Execution Phase — Test Sub-Phase

**Step**
- Execute UAT
- Update Defect Log and UAT Script Log
- Create Implementation Schedule
- Obtain UAT Sign-off
- Update Policies and Procedures
- Finalize Training Materials
- Establish IT Escalation Level Agreement (ELA)
- Establish Service Level Agreement (SLA)
- Deploy Execution Test Survey
- Complete Execution Test Toll Gate
- Enter Deploy Subphase

**Responsible Party**
- UAT Manager
- Project Manager
- Project Manager
- UAT Manager
- Business Unit
- Training Manager & Business Owner
- Project Manager
- Project Manager / Business Owner
- Project Manager
- Project Manager

**Artifact**
- Defect Log
- Implementation Schedule
- Sign-Off UAT (pending artifact)
- Policies and Procedures
- Training Materials & Schedule
- ELA Agreement
- Service Level Agreement
- Execution Test Survey
- Execution Test Toll Gate

OE-PM Artifact ID: M02.00
## OE-PM Closure Phase — Closure Sub-Phase

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<tr>
<th>Step</th>
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<th>Artifact</th>
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<tbody>
<tr>
<td>Complete the Closure Workbook</td>
<td>Project Manager</td>
<td>Closure Workbook</td>
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<tr>
<td></td>
<td>Business Owner</td>
<td>Measurement Plan</td>
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<tr>
<td>Business As Usual</td>
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