

3 Steps To Plan Your Project

CIMcloud Onboarding



Intended Audience

- Program Manager
- Project Manager
- Project Planner



Critical Prerequisite

Understanding The Program, Projects, Platforms, and Solution (PPPS) Framework

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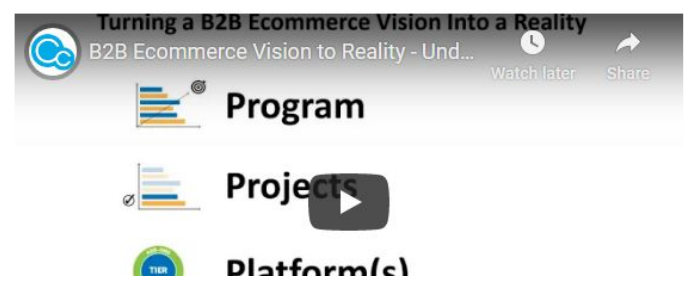
Introduction

When implementing any major software platform like CIMcloud, it is critical that you understand the basics of what we call the Program, Projects, Platforms, and Solution (or "PPPS") Framework. The CIMcloud team has decades of experience implementing B2B eCommerce, B2C eCommerce, and CRM-style applications with back end ERP / account integrations. This video (and the PPPS Framework is explains) helps you gain a clear picture of the factors in play that can make your program and projects a success or failure.

This video (and the concepts presented) are a "must" for the Program Manager, Program Architect, Project Manager, Project Planner, and Lead Operator. It is strongly recommended for all other roles.

By the way, if you don't understand what those roles mean and how they apply to your CIMcloud project, watch the video.

Video Overview



The 3 Steps

- Step 1. Written Goals
- Step 2. Establish a Team
- Step 3. Plan & Track the Work



Step 1. Written Goals

If you don't know where you're going, how will you know when you arrived?

- Keys
 - Keep Them Simple
 - In Writing
 - Stakeholder Buy-in
 - Known By All
- Types Of Goals
 - Capability (Functionality)
 - Adoption (Usage)



Step 2. Establish a Team

- Keys
 - Know the Roles (aka Job Functions, Hats)
 - Use the Job Functions Worksheet
- Every Team Member Is “Yes” To All 3
 - Gets It
 - Wants It
 - Capacity to Do It



Step 3. Plan & Track the Work

- A Plan (At Least) Includes:
 - List of tasks that must be done
 - Dates they must be completed by
 - Person (on the team) that is responsible for completing the task

- What Are The Typical Tasks?
 - Help Center > Onboarding Guide > Onboarding Checklist

