Scheer IMC

LMS Project Implementation Methodology

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1 Preface

The main target group of this guide is the imc customer who wishes to implement the imc Learning Management Suite.

The purpose of this document is to provide imc's customers an overview of an implementation project of the Learning Management System (LMS). To provide the customer with a comprehensive overview this guide describes imc's LMS implementation project based on what imc has determined to be best practice **(please note to accommodate various customer needs the projects can be adapted in scope and cost which might differ slightly from the best practice approach describe herein)** To ensure that imc's implementation meets the demands of its international customers, imc uses the Project Management Institute (PMI) framework as a basis of commonality and understanding.

To achieve the best possible result for "any" project one must share a common understanding of how and what desired results are to be achieved. This document serves as the basis for aligning the understanding of the critical stakeholders in an implementation project, the customer, imc Sales, and imc Business Consulting.

As this document describes the best practice implementation approach the customer-specific LMS implementation project will use this guide as an orientation, however, the customer-specific implementation project offer might differ in terms of work packages. The imc Sales team will answer and explain the differences in the customer-specific implementation project offer in comparison to the best practice approach.

The following core questions will be covered in this document:

- What project methodology does imc employ?
- What is the project framework?
- What is the project's timeframe?
- What are the process groups?
- What are the milestones?
- What is the customer's effort levels during the project?
- What are the responsibilities of imc?
- What are the customer's responsibilities?
- What is the project vocabulary?

2 Introduction

A standard system implementation project (**Implementation Package**) with imc is achieved using the imc designed and developed seven-phase methodology model the so-called **imc LearnWay**. The **imc LearnWay** process model continues to prove itself in many implementation projects, as a 'best practice' application. The methodology follows a constant review and refinement process ensuring it meets both the customer's and imc's current needs and requirements.

The **imc LearnWay** process model is, at its core, an adaptation of the globally renowned project management standards set forth by the PMI. Portrayed here as the project life cycle consisting of six sequential phases and one continuous phase each consisting of process groups and key activities.

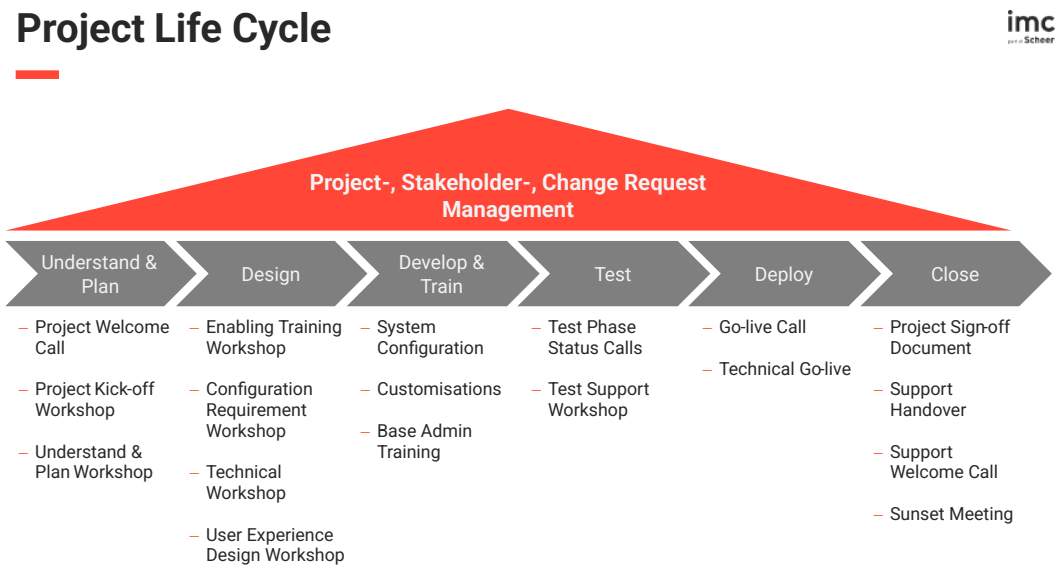

Figure 1: Implementation Project Life Cycle

The following chapters will explain in detail the six sequential phases (Understand & Plan, Design, Develop & Train, Test, Deploy, and Close) and the continuous phase (Project, Stakeholders, Change Request Management).

Aside from the **Implementation Package**, imc implementation services also cover additional services which can be ordered by the customers based on their needs:

- **Technical Set up** covers the main technical services to set up the customer environment (cloud or on-premises). The services included are as follows: Installation services (cloud installation or on-premises installation), corporate design implementation (typically one design per environment), the configuration of license and language packs, technical coordination/support (covering topics such as SSL certificate, URL, and mailing), and code line management / reference system management. Typically, imc starts the technical setup tasks as soon as possible and addresses issues already during the **Understand & Plan** phase.

The technical setup is usually completed during the **Close** phase in which URL, web access, and mailing are activated. The Technical Setup is mandatory for all rollout projects.

- **Standard Available Integrations** might be needed as an addition depending on the customer scenario. They mainly cover integrations to user data sources (CSV, REST, SCIM, organisation structure import, etc.) or with identity providers (SAML2, OpenID Connect, etc.).
- Depending on the customer usage scenario the **Base Admin Training** may need to be extended with additional training sessions (**Additional Training Packages**). These training packages should be placed after the initial training as part of the test phase or even postponed to after Go-live. Typical advanced training topics are Learning Paths, Dashboard Management, On-the-Job Training, Compliance Management, Skill & Competency Management, Test Assessment, Feedback Forms, Resource Management, System Platform Management
- In case, the existing course and the course completion data need to be migrated into the imc Learning Suite a **Historical Data Migration** package can be added to the overall project scope. Imc offers a standard migration of historical learning data, including.

    - **Migration of historical course objects** plus where a new course is created with a name, description, start date, and end date.
    - **Migration of user account/profile** field information (login, name, mail address, etc.).
    - **Migration of completion activity** at course level including date enrolled, date completed, and final status.

  Any further requirements are excluded from the scope. No content within a course will be migrated as part of this standard process, only the course metadata for record purposes. Historical migrations outside the previously described are possible but require an understanding of customer requirements and further scoping to advise the cost and project impact.

- There are two different types of **Customisations**:

    - **Customer Specific Implementations** are implemented for a specific customer only. Typical examples are export interfaces, web services, specific reports, nightly processing jobs, REST calls, etc. This kind of customisations needs a separate customer codeline as that is where they are implemented.
    - **Customer-Driven Standard Enhancements** are developed within the standard product and delivered via innovation packages only. This kind of customization requires confirmation by imc's product management department.

- Of course, imc also offers such as Managed Services / 2nd Level Support services, a configuration of payment interfaces (PayPal, Shopify), configuration of AVETMISS, a configuration of Virtual Classroom Solutions (WebEX, Adobe Connect, G2M etc.), a custom-branded mobile app, as well as additional services for specific modules (Skill & Competency, Gamification, Learning Paths, Learning Analytics, MS Teams Integration, Learning Analytics, Channels, Task List Management) and consulting packages from Learning Strategy Consulting team.

Aside from the implementation of the imc Learning Suite, imc is a full spectrum e-learning provider. As such imc offers additional products and services form its e-learning portfolio, like the creation of content.

- In case a customer also orders services for imc authoring tools (e.g., imc Content Studio, imc Express), these services will be delivered by authoring tool experts but should be coordinated within the overall project scope. Typical services cover training or creation of templates.
- The imc also offers the creation of individual content and/or the provision of standard content. Standard content will be provided within the rollout project depending on the contractual details. The creation of individual content will be managed within a separate project by the imc Content Department.

3 Implementation Phases

Based on the **imc LearnWay** methodology model, each project flows through the seven phases. The details of each phase are described below in this chapter.

On average the Project Life Cycle for a best practice project is 14 weeks, following the critical path and not considering leave, holidays, etc., as depicted in the sample timeline.

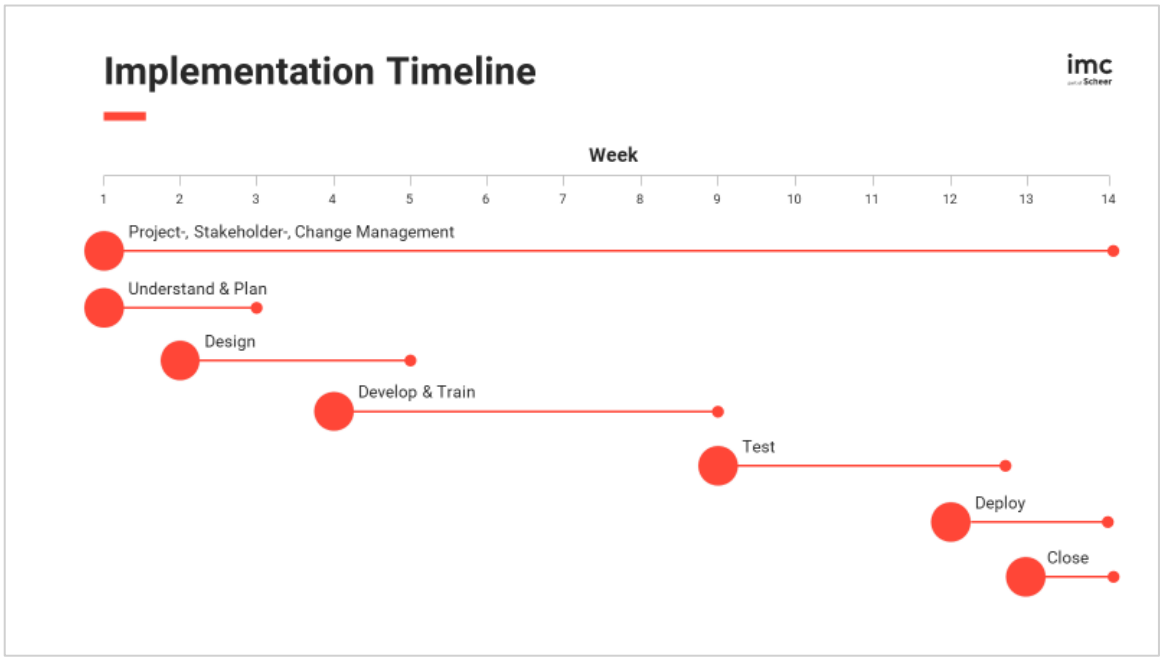

Figure 2: Implementation Timeline

3.1 Understand & Plan

The **Understand & Plan** phase is perhaps the most crucial phase of the project as it forms the foundation for the rest of the project. It is devoted to understanding the customer and thier requirements as well as aligning the overall project structure.

Focusing on the customer's business success, imc aims to integrate the LMS within the customer's existing business culture, workflow processes, and structures. After the official order has been received, the imc internal staffing and resource planning start immediately. The project is promptly assigned to a Project Manager / Business Consultant. Once the assignment has taken place, the Project Manager will be the customer's point of contact throughout the complete project life cycle and is responsible for starting the project internally (sales handover process, internal project management tasks, project setup, project initialisation).

The imc process first becomes visible to the customer with the **Customer Project Onboarding Package** containing a variety of project relevant documents which help establish a solid foundation for the project. Followed with the **Project Welcome Call** (within two weeks of receipt of signed contract or order), by the imc Business Consultant responsible for coordinating and executing the LMS implementation project. The main goal of the **Project Welcome Call** is to establish the first contact between the individuals responsible for the project on both sides and to organise a **Project Kick-off Workshop** as well as the **Understand & Plan Workshop**, while also focusing on developing a shared understanding and planning. Usually, there are already some technical tasks that can be started or initiated immediately as they are part of the **Technical Setup**.

Once a suitable date has been agreed upon the onsite workshop begins with the following topics:

Project Kick-off Workshop

The goal of the project setup is to establish and align the parameters within which the project will operate. The imc Project Manager / Business Consultant will lead this kick-off based on the imc best practice approach. The details of some of the key elements are:

- **Project scope**: The project scope is defined during the sales process and reaffirmed during the planning phase.
- **Project roles and responsibilities**: Project roles and responsibilities must be defined. Typically, on the imc side, the project is managed/implemented by a dedicated imc Business Consultant. Depending on the hosting model and/or technical complexity, further technical staff or project advisor is involved from the imc project team. The imc assumes that the customer will provide a business or technical contact person, as well as a Project Manager as the lead contact. To help visualize this imc uses either a RACI Matrix or an organisational chart, depending on the complexity of the project.
- **Communication**: The project kick-off is used to determine the communication structure and ensure access to the relevant individuals on both sides. Communication is done primarily through imc's **Project Ticketing System** (Jira) and secondly through email. The Jira ticketing system, to which the customer receives access, is used to track all open tasks, and identified issues. All project activities and open points must be documented there. Jira is a critical project tool as it allows both imc and the customer to monitor project status, clearly depict responsibilities, and document discussions. The driver behind this is transparency, which is to have a full overview of current open tasks and issues list. The imc Business Consultant will provide a quick documentation guide on how to use the ticketing system during the project start.
- **Escalation paths**: Escalation paths must be defined to align a shared understanding of how to deal with possible escalations.
- **Project reporting**: Minutes for common meetings (kick-off, workshops) that include major results/decisions and tasks are written by imc. Furthermore, imc recommends a bi-weekly **project status report** and a weekly **project status call** where current project tasks, completed and upcoming activities, project risks (scope, time, budget), as well as the timeline will be discussed. To support and provide accurate project reporting imc uses Jira.
- **Project planning**: imc will provide an initial project plan connected to the relevant working packages ordered as implementation services. The project plan will be updated throughout the project and used as a basis to discuss critical points that will be addressed within project status calls and documented in project status reports.

- **Technical topics**: Topics relevant for technical setup such as URL, SSL certificate, mailing but also additional interfaces ordered in the project scope such as user import, SSO authentication. These can be discussed during the kick-off.
- **Change Request management**: imc will endeavour to deliver the project as agreed upon within the project scope. Should the scope change due to a change in requirements, this will initiate a change request. imc will communicate the extra effort and cost required to implement the change request.
- **Technical go-live / project closing procedure**: imc considers the technical availability of the system in the designated environment to be the definition of technical go-live, at which point the project is completed and can be signed off by the customer. The details are explained in the chapter relating to the deploy and close phases.

Understand & Plan Workshop

To integrate the LMS in the customer's ecosystem, the Understand & Plan part of the workshop consists of several steps of analysis as well as defined plans. This part of the workshop is led by the imc Business Consultant. The detailed topics are:

- **Base analysis**: The analysis of the status quo of the customer, which helps clarify the goals on several levels (corporate goals, project goals, learner goals, business outcomes).
- **Application scenario analysis**: Together with the customer the most important application scenarios are discussed that will be realized with the implementation project. Th eBusiness Consultant uses some question guidelines to better understand the overall customer setup and scenario.

During this phase, the imc project team will also begin working on the additional parts of the ordered implementation services. Customisations need to be scheduled/planned and integration tasks need to be initiated as soon as possible. All the ordered implementation services should be addressed during kick-off such that all involved sides can start preparation work.

Summary:

The goal of the **Project Kick-off Workshop** is to empower the customer in understanding the various success factors of the project and their role and responsibilities within the process. The project is led by the imc Project Manager / Business Consultant that contributes the expert knowledge in the understand and plan part of the project.

Understand & Plan Phase Overview	
Key components	Customer Project Onboarding, Project Welcome Call, Project Kick-off Workshop / Understand & Plan Workshop
In scope	As defined by the offer
Out of scope	Items found during the affirmation of the project scope.

Milestone(s)	Meeting notes
Customer engagement	Medium-High
Customer responsibilities	Resource planning (business and IT), and input for usage scenario are mandatory.

3.2 Design

The **Design** phase is devoted to the refining of the previously gathered requirements and specifications. This is accomplished during the enabling / configuration workshop which requires considerable customer involvement/input.

For the workshop preparation, the imc Business Consultant will provide **Configuration Workshop Guidelines**. These guidelines will enable the customer to be an active partner in the exercise. The design phase includes four workshops:

- **Enabling Training Workshop**: Following imc's best practice, customers participate in a hands-on enabling training session of the LMS providing a solid foundation of understanding for the configuration workshop.
- **Configuration Requirement Workshop**: Combining the knowledge gathered in the **Understand & Plan phase** as well as the enabling training, imc will guide the customer through the process of matching the customer's existing processes to the LMS processes. The imc Business Consultant discusses customer requirements and design solutions within the LMS application. All results will be summarized on slides and major results are recorded in the meeting minutes.
- **Technical Workshop**: In case the technical topics were not fully covered during the project kick-off workshop, the design phase also includes a technical workshop session that covers.

    - technical setup topics (system URL, SSL certificate, mailing, etc.).
    - integration topics (user import, authentication).
    - customization topics (customer-specific enhancements or standard enhancements)

  It might be necessary to organize this workshop outside the onsite workshop days as additional technical resources on both sides might be needed.

- **User Experience Design Workshop**: Offering an extremely refined and customer-centric design, exceeding that of the standard adaptation. The imc can provide this as an additional

service in the form of a workshop where an experienced imc frontend designer is present to discuss requirements and practical solutions.

Aside from the workshops, there will also be further ordered implementation services that will need to be designed, to include customisations, integrations (user imports, authentication, etc.), import of historical learning data, or even the configuration of specific modules.

Summary:

The ideal outcome of the design phase and design workshop should be that the requirements captured have been refined to the point that both the customer and the imc project team are aligned. The **Configuration Requirement Workshop** and **Technical Workshop** are core elements of the design phase with the Technical Workshop being optional to provide customers additional support if needed. The **Enabling Training Workshop** and **User Experience Design Workshop** can be removed from the project scope for well-versed customers, although the imc best practice project approach recommends covering these topics. For complex projects, imc may offer operational concepts that describe the configuration settings and usage scenarios in detail as an optional service.

Design Phase Overview	
Key components	Configuration Workshop Guideline, Configuration Requirement Workshop, Technical Workshop, Enabling Training Workshop, User Experience Design Workshop
In scope	Enabling user training, Configuration workshop (As defined by implementation project type i.e. best practice, standard, etc.) Technical Workshop (As needed)
Out of scope	Items found during the affirmation of the project scope.
Milestone(s)	Approved configuration workshop notes
Customer engagement	High
Customer responsibilities	Technical resources for technical setup (URL, SSL, mailing) are needed. Participation in workshops by business and technical resources.

3.3 Develop & Train

The **Develop & Train** phase consists of two main parts:
Configuring and changing the system according to customer requirements and **delivery system training** as preparation for the upcoming testing phase.

Configuring and changing the system is devoted to **implementing the specifications** generated during the design phase. This is accomplished in the following ways.

- The first is to use imc's **standard functionality** to set up (**Configuration**) the system according to the aligned specifications to match the customer's use case and business processes. This can include but is not limited to, platform design (logo, colours, images, etc. as part of the Technical Setup), customer business processes, and organisational structures. Depending on additional interfaces ordered within the project scope, user import routines, and authentication modules are configured, and the import of historical data is prepared.
- The second is through **Customer Specific Implementations**, which as the name suggests is a custom-built software solution based on the customer's specific business requirements (**Customisation**). Custom-built software solutions are implemented for the ordering customer only. Typical examples are import, export routines, learning history import routines that are more complex than standard import routines, specific reports, or – in general – specific code changes that are only needed for the ordering customer.
- The third is through **Customer-Driven Standard Enhancements**, here the customer business requirement is adopted into the core software (**Customisation**). The advantage here is that the enhancement introduces less risk in terms of support and maintenance, and it is also covered by the standard support and maintenance contract for future updates. Because these enhancements need the involvement of the imc Product Management department, resulting in fixed release dates as well as considering the overall system behaviour and usability with the proposed solution.

Once the requirements have either been configured or developed, the customer will receive a **Base Admin Training** on the new system. The training will take place in the customer's environment enabling them to understand, work with, and give feedback on their system. This point of the project is critical as it lays the foundation for the testing phase which includes User Acceptance Testing (UAT). Typically, the admin training takes two full days as it provides a general overview of system functionality. Depending on the customer usage scenario and prior experience with LMS systems, the admin training session duration may be adjusted.

Although the **Base Admin Training** provided has proven to be successful, the customer's test team may purchase additional training as an optional package (Additional Training Packages) to further enable participants. to conduct the testing with higher efficacy. Specific training might cover topics such as testing, feedback, certifications, detailed system configuration, etc. that cannot be covered in full during the **Base Admin Training** session.

Summary:

The desired outcome of the **Develop & Train** phase is that customers are enabled to start testing on a configured and customised environment. The effort for configuring the system highly depends on the customer's usage scenario. The best practice approach assumes a medium complexity (in terms of application scenario). The admin training also has the goal to enable customers to extend simple system configuration (i.e., changing dashboards and panels on learner frontend pages, changing system texts, and defining enrolment message and notification texts).

Note:

The **Base Admin Training** is extremely important for project success. It is highly recommended to involve all critical people on the customer side that will conduct the Test phase afterward. From imc perspective, the **Base Admin Training** is the prerequisite for proper testing during the test phase. Also, the **Base Admin Training** is the first time where the whole project team works on the configured environment. This can function as the catalyst for the test phase as well as identifying the first minor configuration changes.

Develop & Train Phase Overview	
Key components	Configuration (including integrations), Customisations (Customer Specific Implementations, Customer Driven Standard Enhancements), Base Admin Training
In scope	Up to three-course types, up to two-course room types, up to two clients, up to four roles (Tutor, Admin, Supervisor, Learner), this includes dashboards for each role, one role and rules concept with a group structure, up to two catalogues. Also, imc will setup up to two enrolment forms, and supports with the creation of pdf certificates and user profiles/user lists. This might be reduced depending on the customer's usage scenario i.e., if only one client is needed.
Out of scope	Creation of course content, specific/specialised training on customer configured system (these are offered as separate training packages), additional enrolment form (retrieval of customer-specific data during enrolment process), global system wording changes, an adaptation of enrolment messages, certificate creation, creation of location structure.
Milestone(s)	Customer approval to proceed to testing phase.
Customer engagement	Medium

Customer responsibilities	Organisation / participation in base admin training by project team and representatives from business departments (depending on organisational setup).

3.4 Test

The Test phase is devoted to performing technical and functional tests including Quality Assurance Testing (QAT) and User Acceptance Testing (UAT). Testing is designed to ensure compliance with customer requirements and to guarantee the smooth operation of the system.

Considering the imc best practice approach, **testing is scheduled for a three-week period** followed by one week of imc implementing the customer feedback.

User Acceptance Testing (UAT) consists of a process of verifying that the implemented solutions work for the user(s). This testing should be undertaken by a subject-matter expert (SME), preferably the owner or designated client of the solution under test, and provide a summary of the findings for confirmation to proceed after trial or review. System users perform tests in line with real-life scenarios. The materials given to testers should closely resemble those that will be available to actual users. Testers should be given real-life scenarios. UAT should be executed against such test scenarios. The imc highly encourages its customers to follow this methodology. Should the customer not be able to or wish to create such test scenarios imc offers these as an additional service.

During the test phase, the imc Business Consultant supports the customer via ticket tool reviewing reported findings, configuration changes, or questions. As part of the best practice approach, regular calls, and web sessions (**Test Phase Status Calls**) are recommended to provide feedback and solve urgent issues quickly. Also, imc offers a **Test Support Workshop** (half-day web session) with the core project team to address overall test scenarios and provide ad-hoc solutions to provided test feedback.

After implementing the test feedback and completing the integration tests, the testing phase is complete, and the system is ready for deployment / productive usage.

Summary:

The following targets are in the focus of the test phase: (a) system is configured as discussed in the requirements workshop, (b) integrations (e.g., authentication methods such as SAML2 or Open-ID Connect, or user import routines) are working as expected, (c) ordered customisations are working as defined in the specification documents, and (d) import of historical data shows the expected behaviour.

Note:
In case, a customer wants to extend the testing phase due to external factors that are not caused by imc, this situation should be discussed within the final test phase status call. Typically, imc Account Management will offer a test phase extension. Examples of reasons for these kinds of extensions are (a) input (texts, content, decisions) is delayed and cannot be provided or implemented by the customer project team directly, (b) testing resources on the customer side were not available, or (c) technical delays on customer side caused problems during the test phase.

Test Phase Overview	
Key components	Schedule and criteria for system testing; definition of pilot user group, evaluation of results from the pilot, technical and functional tests completed, Test Support Workshop
In scope	3-week test phase with fixing of reported issues to include configuration changes (all changes must be reported during the three-week test phase to be considered “in scope”). Test Support Workshop
Out of scope	Creation of test plans/test cases, coordination of test groups, creation of test data. The test phase can be extended upon, customer request with an additional offer by imc Account Management.
Milestone(s)	Customer approval to proceed with deployment.
Customer engagement	Medium
Customer responsibilities	Testing of usage scenarios including managing UAT, and technical integration testing. Providing feedback to imc project team.

3.5 Deploy

The **Deploy** phase covers all activities relating to the move to the final hosting environment and its integration with other software systems. At this point, the implementation has achieved the **“technical go-live” which imc considers being the last step required for the approval and closing of the**

project. A technical go-live does not mean that the learner/end-user will access the system – it is simply the confirmation that the system is ready for productive usage.

Specific activities leading up to the last step are:

- Managing system freeze and cut-over phase.
- System validation
- Design of supporting measures for system roll-out
- Customers go-live planning.
- Conducting import of historic learning data (if in the scope of the project)
- Import of all user data for go-live.
- Activation of productive mail sending

Typically, the **technical go-live** status is summarized in a **go-live call** together with the imc Business Consultant. The call is used to define open points and plan the **technical go-live** and project closure procedure. Typical questions that are addressed during this call are:

- Are there go-live blocking software defects? If yes, the imc project team will request hotfix packages with solutions as fast as possible, however, impacts on the initial timeline cannot be excluded. All non-blocking issues will be handed over to imc **Service Desk** during the **Close** phase.
- Are all integrations activated? Are all users imported and authentication methods activated?
- Has the historical data been imported into a productive environment?
- Are all ordered & go-live critical customizations delivered? Non-critical customizations might be handed over to imc Service Desk for later delivery after go-live.
- Are all configuration changes addressed and all further open configuration changes are identified as change requests?
- Have all system preparations on the customer side been initiated and is the system ready for productive usage (courses created, content uploaded, catalogues available, dashboard pages, and news published)?
- Have all rollout and communication measures been initiated and are ready for go-live?

Summary:

The main goal of the deploy phase is to prepare the system for productive usage and to ensure that all organisational measures have been initiated for go-live. If all imc related activities have been completed, no blocking software related tasks are open, and the productive environment is prepared for productive usage, imc sees the **Technical Go-live** status as being fulfilled. In the next step, the imc Business Consultant will initiate the official project closure.

Note:
Like in the test phase, there might be good reasons on the customer side to extend the project timeline although technical go-live status has been reached. Typically, the imc Account Management will offer a general project extension which should be discussed within the **go-live call**. Examples of possible reasons for these kinds of extensions are missing input from other departments on the customer side or from external vendors, additional rollout, and communication measures that need to be completed on the customer side.

Deploy Phase Overview	
Key components	imc and customer alignment for system roll-out; final system availability for productive usage, **technical go-live** status reached.
In scope	All activities relating to the move to the final hosting environment, Deactivation of test mode for mail sending.
Out of scope	End-user training, extensive system documentation, detailed documentation of customer configurations and customisations, purchase of domain name and SSL certificate, marketing, and marketing materials
Milestone(s)	Technical go-live
Customer engagement	High
Customer responsibilities	LMS content population, rollout communication, and end user guidance.

3.6 Close

Having achieved the **technical go-live** status, the project needs a formal closing. Aside from the obvious need of bringing the project to a conclusion another important part of the **Close** phase is to facilitate a hand-over of the customer from the imc consulting department to the support department. To make this transition as seamless as possible imc follows a series of steps to accomplish this.

- **Project Sign-off Document**: The main purpose of this document is to clarify within the project team that ordered services are delivered and the software is ready for productive usage. For official confirmation, imc prepares and provides this document to the customer. Aside from the formal aspects (contact data, version numbering, hosting model), the document summarises relevant data protection and security topics as well as a listing of topics handed over to support upon project closure. Typical topics are:

    - non-blocking software defects
    - outstanding services that are postponed for a later stage including open training sessions and remaining managed services budget.

  The document must be signed off by the customer Project Manager as a confirmation of the project closure and as a prerequisite of productive software usage.

- **Support Handover**: Internal handover within imc from consulting to support to ensure a seamless transition process.
- **Support Welcome Call**: The support welcome call is designed to help the customer understand the scope of services offered by the support team as well as to enable efficient engagement with the support department.
- **Customer Project Offboarding:** Formal and final notification to the customer informing them that the project is concluded
- **Sunset Meeting**: Together with the customer the imc Business Consultant reviews the project and discusses possible future steps (including open points from the project that are mentioned within the project sign-off document). This meeting, led by imc Business Consultant, reflects on the overall project, and discusses the future direction of the system. Furthermore, this meeting serves as a handover to imc Sales for the coordination, the technical aspects such as future developments and improvements of the system.

Summary:

It is important to note that the closing of the project coincides with the technical go-live and not the introduction of the system to the customer's end users (**Customer go-live**). The Customer go-live is the sole responsibility of the customer (there might be various phases where the target group is split into several parts). In case, there is a fixed and planned Customer go-live date (e.g., announced course launches according to the rollout plan), all closing activities must be planned carefully before this date and must be reflected within the overall project plan. Typically, only the Sunset Meeting takes place after the Customer go-live date but even this highly depends on the overall rollout strategy.

Close Phase Overview	
Key components	Formal Project Sign-off Document, Customer Project Offboarding, Sunset Meeting, Support Welcome Call, log-in data to support system, maintenance, and support process documentation.
In scope	Sunset Meeting, Support Welcome Call, project closing documentation (sign-off document, maintenance, and support document)

Out of scope	Coordination of Customer go-live.
Milestone(s)	Project Sign-off Document / Project Closure
Customer engagement	Low
Customer responsibilities	Active role in project closure and handover process by clear responsibilities for support processes.

3.7 Project, Stakeholder, Change Request Management

Supporting activities related to project management are needed for a successful system implementation project. These activities cover all aspects of project management such as monitoring, reporting, review, issue management, and documentation. To support project communication, imc uses a **Project Ticketing System** based on Jira where all open and completed tasks are listed. Tasks are classified and the responsible person is defined such that all relevant project members can follow the status of the tasks.

In comparison to the other phases of the life cycle, change, project- and stakeholder-management extends over the complete project duration. While the Business Consultant does not actively perform stakeholder management or change management, as this is a customer activity, the Business Consultant should have an awareness of these activities as they can affect the project and its outcome. Activities that the Business Consultant's responsibilities in managing the project include **Project Status Calls** (weekly) providing continuous information on project progress, stakeholder-related workshops to provide feedback, and gather input on project activities along with documented status reports. During the project setup, the project team determines the exact scope of such activities. Also, (bi-weekly) **Project Status Reports** summarize the current project status in terms of completed and open tasks/activities, project progress on working packages, and project risks.

Every project needs proper planning to identify risks and delays. Thus, imc starts with an initial **Project Plan** for the kick-off workshop. All relevant working packages must be included as part of the ordered implementation services. The project plan will be managed over the project timeline and critical points will be addressed within project status calls and project status reports.

Summary:

Project Management covers the complete project life cycle, using Project Plans, Project Status Calls, and Project Status Reports as its primary tools. It is to emphasise that imc will not manage the customer's internal stakeholders and Change Management but only offers and contributes to the awareness factors.

Project, Stakeholder, Change Request Management Phase Overview	
Key components	Alignment of project management, change request management, and stakeholder management (awareness), Project Status Calls, Project Status Reports, Project Plan
In scope	Essential project management (by imc's standard approx. 10-20% of the consultant's efforts are dedicated to project management)
Out of scope	Project management focuses on project status within the core project team. Additional project management activities in additional areas (project sponsor meetings, customer internal project reports, working counsel, etc.) are out of scope. Similarly, direct stakeholder management and change management within the customer's organisation is out of scope.
Milestone(s)	N/A as this is a continuous phase.
Customer engagement	Low – Medium
Customer responsibilities	Change management and stakeholder management are in the responsibility of the customer project team / project manager.

4 Common Terminology

As the terminology used in projects is also used for descriptions outside of the project, this list explains imc's understanding of the terminology as it pertains to the project.

Term	Description
Base Admin Training	Training offered to enable the customers to work in, understand, and give feedback to their system environment.
Business Consultant / Project Manager	For each project, imc has a dedicated Project Manager to coordinate all project activities and communicates with customers and internally. Typically, imc Business Consultant (LMS expert) fulfils this role and combines consulting and coordination role at the same time. For huge implementation projects, imc splits the role of Project Manager and Business Consultants.
Change Management	As applied on the project level and not the organizational level, change management endeavours to manage change within the project be that from internal or external influences.
Change Request	Any formal request made within the project which can have a potential effect on the budget or timeline of the project, by being identified as out of scope. A change request among other things might be related to a not (yet) ordered customization identified within the project or a scope change causing additional configuration effort.
Configuration	The general term used to describe the setting of parameters within the LMS, based on customer requirements.
Configuration Guidelines	Guidelines provided by imc to enable the customer to prepare for the configuration requirement workshop.
Configuration Requirement Workshop	Requirement workshop led by imc Business Consultant in which the imc reviews and develops the system configuration requirements.

Customer Driven Standard Enhancements	The general term used to describe a customer-specific solution within the LMS, based on customer requirements. This solution is however made available to all imc LMS customers.
Customers go-live	Customers go-live refers to the introduction of the system to the customer's end users. This go-live date takes place after the technical go-live confirmation including the signed Project Sign-off Document.
Customer Specific Implementations	The general term used to describe a customer-specific solution within the LMS, based on customer requirements. This solution is however made available only for the customer.
Customisation	The general term used to describe a single customer-specific solution within the LMS, based on customer requirements.
Enabling Training Workshop	Hands-on workshop lead by the Business Consultant designed to empower the customer with a fundamental understanding of the imc LMS.
Escalation	The process of increasing the magnitude by bypassing the immediate person, with the path being determined by the project structure.
Go-live call	The imc Business Consultant will arrange a call with the customer confirming the system is ready and ensure there are no last-minute issues not already noted or addressed.
imc LearnWay	This refers to the imc methodology for implementation package consisting of six sequential phases (Understand & Plan, Design, Develop & Train, Test, Deploy, and Close) and the continuous phase (Project, Stakeholders, Change Management).
Learning Strategy Consultant	Optional service by imc to support customers with implementation projects.
Project Kick-off Workshop	The official beginning of the project was held either in form of an onsite workshop or as a web session (specific cases). This kick-off workshop is led by imc Business Consultant (Project Manager).

Project Life Cycle	The time from the inception of the project to the closing of the project.
Project Plan	Provided by the imc consultant this plan is used to track the progress of the project as well as informing the customer of relevant upcoming tasks and milestones.
Project Setup	Also referred to as initialization, this describes the process of structuring the framework under which the project will operate.
Project Sign-off Document	The official project closing document provided to the customer requiring the customer to confirm that imc's project obligations have been met.
Project Status Calls	Scheduled calls (the frequency is determined in the kick-off) between the imc consultant and the customer to update on the project and discuss any issues which need to be addressed.
Project Status Reports	Formal written update on the project provided by the imc consultant to the customer. The frequency is determined during the kick-off.
Project Ticketing System	Within projects, imc uses a Jira based ticketing system to communicate and track project tasks, throughout the project life cycle.
Project Welcome Call	Within two weeks of the signed order, imc will coordinate an initial call with the customer to discuss official kick-off dates. The welcome call is also to meet the core project team and to start specific tasks (e.g., technical setup tasks).
Sales Handover	The imc internal process in which the sales team communicates the project requirements to the Business Consultant and other project team members.
Service Desk	Support structure offered by imc to the customer, which deals with customer requests after the hand over from the Business consultant.

Stakeholder / Stakeholders	An individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.
Sunset Meeting	This meeting led by imc Business Consultant reflects on the overall project and discusses the future direction of the system. Also, this meeting serves as a handover to imc Account Management for the coordination of future development and improvement of the system usage.
Support handover	Internal process in which the imc Business Consultant briefs the support team on the new customer and informs them of any outstanding issues that are to be completed after project closure.
Support Welcome Call	Introduction call from the support team briefing the customer on the use of imc Service Desk (Help Desk) and the status of open issues handed over from the project to the support team.
Technical go-live	This term is used by imc to confirm that the system fulfils the previously agreed requirements and is ready for the customer to introduce to their users.
Technical Setup	The term refers to the main technical services to set up the customer environment (cloud or on-premises).
Technical Workshop	An optional workshop held during the design phase covering that covers, technical setup topics, integration topics, and/or customization topics
Test Phase	A general term referring to the phase in which the customer is responsible for evaluating the LMS ensuring that the requirements have been met.
Test Phase Status Calls	Set during the test phase the purpose of these calls is to provide feedback thereby allowing the project team to react quickly to urgent matters.
Test Support Workshop	The purpose of this workshop is to provide a more in-depth look at the LMS, intending to enable the customer to generate a high quality and high-efficiency testing phase.

Understand & Plan Workshop	Consists of several steps of analysis as well as defined plans. The main purpose is to integrate the LMS in the customer's ecosystem. This workshop is led by imc Learning Strategy Consultant.
User Experience Design Workshop	A workshop lead by the Business Consultant and a member of the design team, to maximize the customer's corporate identity within the LMS.