

Our

**Gladstone Change**

**Framework**

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# Gladstone Change Framework

00

## Our project journey

### Scoping

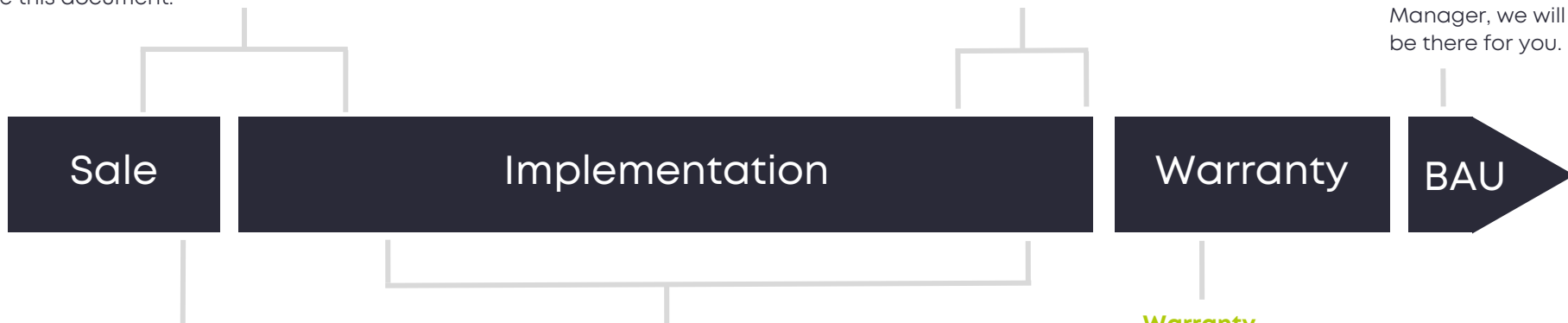
At this stage, we work with you so we can write our Terms of Reference. This document will allow us to agree on all elements of the project, from scope to what success will look like. Our customers will be asked to review and approve this document.

### Closedown

This is an opportunity for us to work together to agree on a closedown of the formal implementation phase, and clearly articulate the next steps and phase of the journey - whether that be a warranty period or our BAU support. As our customers, you'll be involved in this and will be asked to approve this to make sure you're comfortable. As part of this process, we make sure our internal departments are all lined up and ready to support you in the right way.

### BAU support

Despite the project journey ending, our support to you doesn't. Whether that be through our Customer Support, Customer Success, or our Professional Services Teams, or your Account Manager, we will continue to be there for you.



We work in partnership with you to make sure you have the right products to meet your needs. We then work internally across our Sales & Marketing, Professional Services, R&D, Customer Success and Customer Support Teams so we all know exactly what you need and to discuss how we will support you throughout your project journey and beyond.

### Delivery

During this phase, we use our standard project artefacts. These will be agreed with you upfront as to which ones are most appropriate for the size of your project. This will include things like a detailed plan/GANTT chart, high level timelines and a RAID log as well as regular status updates.

### Warranty

If we've agreed a warranty period as part of the planning, this will be where we have an agreed period of time where we have some additional wrap-around care. As we close this period down, like the closedown phase, we will write a document (which you will be involved in) that articulates how BAU support will work and how.

# Gladstone Change Framework

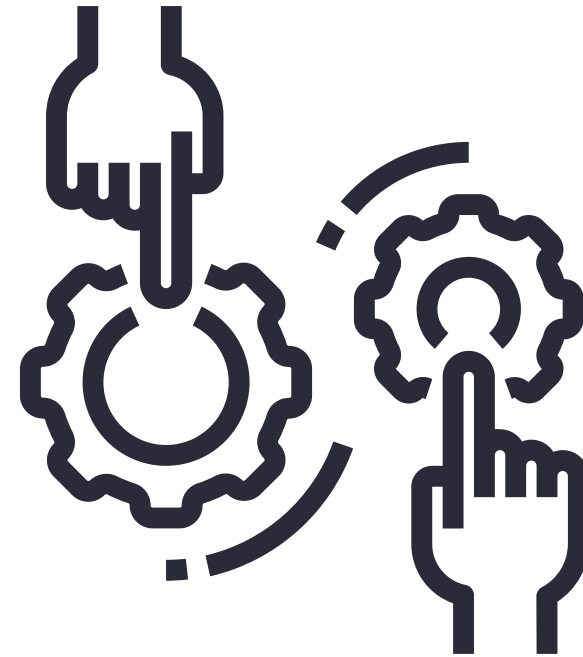
## Our project methodology



# Gladstone Change Framework

## Templates

Our Gladstone Change Framework is adaptive. We will work with you in the planning phase to agree on how we should work together and which parts of our framework we will use. This will depend on the size of the project and/or your needs. The next section shows the templates we use with you.




# Project initiation

This is a discovery and planning phase where we will be working with you to translate your needs into a Gladstone project. Closer to the time, we will discuss with you in more detail how you would like this to work.

# Terms of reference

This is a document that will allow us all to agree on all elements of the project from scope to what success will look like. This will articulate the objectives of the project, the deliverables, the milestones, the things we may need from you before and during the project, the approach that we'll take, project closure criteria, what a warranty period might look like (if applicable) and any known risks and issues. So we know you're happy this captures what you would expect, we will ask you to review and approve.



**1. Introduction**  
The introduction should summarise the sale discussion and provide a brief overview so the client knows that the PS team have had a good handover discussion from Sales and (where applicable) Customer Success.

- Who customer this project is for
- The products / services that the customer has purchased

Sales Team should be comfortable with this section

**2. Scope and deliverables**  
The scope section should articulate the services that will be delivered by Professional Services.

**3. Objectives**  
The objectives section should articulate the objectives that the customer is trying to achieve as a result of purchasing the product or service.

**4. Milestones and timescales**  
The timescales should layout the indicative dates of each milestone in a table format. They should be specific enough to commit to but should be realistic.

| Milestone Name | Indicative Date (subject to planning) |
|----------------|---------------------------------------|
| Milestone 1    | Date                                  |
| Milestone 2    | Date                                  |

**5. Pre-requisites**  
This should explain, simply, what the pre-requisites we need to achieve the project:

| Pre-requisite | Owner | Date |
|---------------|-------|------|
|               |       |      |

**6. Costs**  
This should lay out the cost of the project, the payment instalments and cover impact of cancellations / pre-requisites not being hit / blockers from the client.

**7. Approach**  
This section should articulate the approach that the project manager will be taking across the following themes:

# 03 Risks & issues log

During the course of the project, we will constantly be capturing any risks to the project, issues that may have occurred, key decisions that have been made by you or by us and any dependencies. Importantly, we will regularly share this with you and work with you to define and progress any mitigating actions if needed.

**RAID LOG**

Project name:

Project manager:

| ACTIONS   |             |      |          |             |           |          |          |        |
|-----------|-------------|------|----------|-------------|-----------|----------|----------|--------|
| Action No | Date raised | Area | Priority | Description | Action by | Deadline | Progress | Status |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |
|           |             |      |          |             |           |          |          |        |

# 04 Project plan & 'plan on a page'

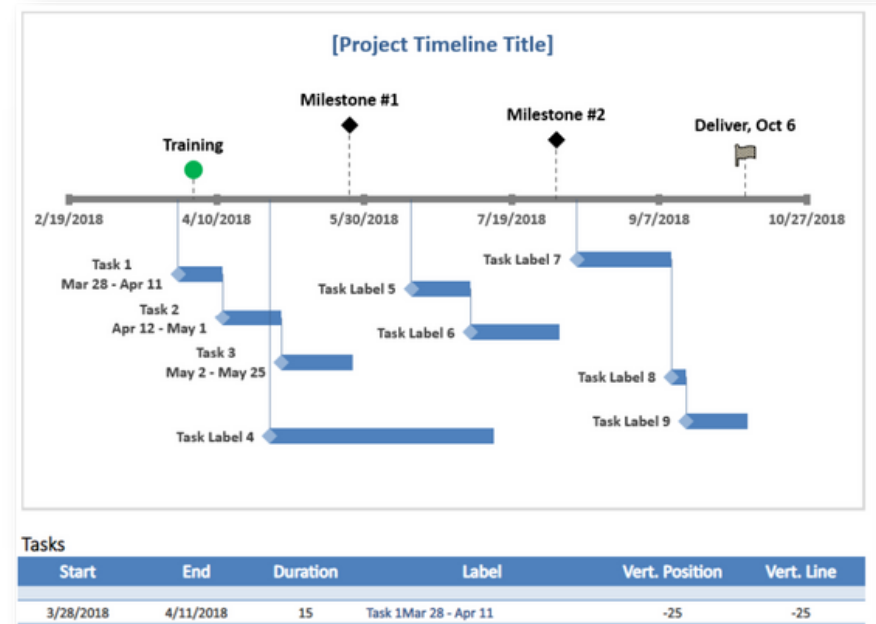
Throughout the project, we keep detailed project plans of all of the activities, dates and owners of each item. We update this and share it with you on a regular basis. We will also regularly share a high-level timeline of milestones, so you can easily view project progress in one place.

**Gladstone PROJECT NAME**

Project Start: Sun, 1/1/2023

Display Week: 1

| TASK                 | ASSIGNED TO | PROGRESS | START   | END     |
|----------------------|-------------|----------|---------|---------|
| <b>Workstream 1</b>  |             |          |         |         |
| Run Training Session | John        | 75%      | 1/1/23  | 1/4/23  |
| Task 2               |             | 60%      | 1/4/23  | 1/6/23  |
| Task 3               |             | 50%      | 1/6/23  | 1/10/23 |
| Task 4               |             | 25%      | 1/10/23 | 1/15/23 |
| Task 5               |             |          | 1/5/23  | 1/7/23  |
| <b>Workstream 2</b>  |             |          |         |         |
| Task 1               |             | 50%      | 1/6/23  | 1/10/23 |



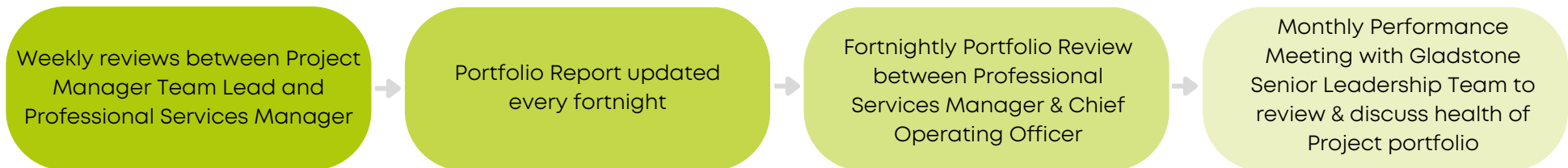
# 05 Reports

It's important you understand the progress of the project. Every fortnight (as a minimum) we will share with you a status report. In this report, we will articulate the overall status, what's been achieved since the last report, what will be completed in the next period and any key risks or issues that you need to be aware of. In addition to this, we will have regular meetings to discuss progress and move forward key actions.



# 06 Governance

To give you some assurance, Gladstone has our own internal governance where we review the progress of all of our projects.



**GLADSTONE PORTFOLIO SUMMARY TEMPLATE**

| DEPARTMENT          |                       | PORTFOLIO FINANCIAL HEALTH |            | PROJECT STAGE COUNT |   | PROJECT HEALTH LEVEL COUNT |   | STATUS LEVEL COUNT |   |
|---------------------|-----------------------|----------------------------|------------|---------------------|---|----------------------------|---|--------------------|---|
| DEPARTMENT          | Professional Services | FORECAST                   | £1,085,000 | PRE-SALE            | 0 | 1                          | 2 | 3                  | 4 |
| DEPARTMENT LEAD     | Sharon Denton         | SPENT                      | £274,500   | SCOPING             | 0 | 1                          | 2 | 3                  | 4 |
| NUMBER OF PROJECTS  | 10                    | DIFFERENCE                 | £1,361,500 | DELIVERY            | 0 | 1                          | 2 | 3                  | 4 |
| DATE OF LAST UPDATE |                       |                            |            | CLOSEDOWN           | 0 | 1                          | 2 | 3                  | 4 |

| PROJECT HEALTH LEVEL | STATUS      | PROJECT ID | PROJECT NAME | STAGE     | PROJECT SUMMARY | PROJECT MANAGER | FORECAST | INITIAL DATE OF COMPLETION | NUMBER OF DAYS REMAINING | PERCENT OF PROJECT COMPLETED | ASSOCIATED RISKS | COMMENTARY |
|----------------------|-------------|------------|--------------|-----------|-----------------|-----------------|----------|----------------------------|--------------------------|------------------------------|------------------|------------|
| 1                    | AT RISK     |            |              | DELIVERY  |                 |                 | £800,000 | 31/12/22                   | 176                      | 20%                          |                  |            |
| 2                    | WARNING     |            |              | DELIVERY  |                 |                 | £285,000 | 15/04/23                   | 29                       | 30%                          |                  |            |
| 3                    | MAJOR ISSUE |            |              | WARRANTY  |                 |                 | £0       | 14/04/23                   | 30                       | 20%                          |                  |            |
| 4                    | ON TRACK    |            |              | CLOSED    |                 |                 | £0       | 17/04/23                   | 31                       | 25%                          |                  |            |
| 5                    | ON TRACK    |            |              | CLOSEDOWN |                 |                 | £0       | 18/04/23                   | 32                       | 11%                          |                  |            |



# 07 Gladstone & customer readiness & acceptance

This is a document that makes sure you're ready to accept the change as well as making sure all of our internal Gladstone Departments are ready to support you in the right way. For example, we will use this to check all training has been completed and that you're happy to move to the 'go live' part of the project. It's important for us to make sure, by way of this document, that our internal teams are ready and able to support you. This is approved by you and by us.

**1. Customer Readiness**

| Readiness Criteria   | Yes / No / N/A | Activities delivered |
|--|----------------|----------------------|
| I understand what is being delivered, when and why                     |                |                      |
| Training was completed as agreed                                       |                |                      |
| My team/ies know what to expect and were prepared for it               |                |                      |
| My customer experience has not impacted and ideally was being enhanced |                |                      |
| I have had the warranty (if applicable) and BAU processes explained    |                |                      |

**2. Gladstone Readiness**

| Readiness Criteria                | Awareness of the implementation | Fully trained and able to support |
|-----------------------------------|---------------------------------|-----------------------------------|
| Sales & Marketing                 |                                 |                                   |
| Professional Services (all teams) |                                 |                                   |
| Research & Development            |                                 |                                   |
| Customer Support                  |                                 |                                   |
| Customer Success                  |                                 |                                   |

**3. Accepted issues into live**

| Issue | Action | Owner |
|-------|--------|-------|
|       |        |       |
|       |        |       |
|       |        |       |

**4. Signatures**

Gladstone:

|            |  |
|------------|--|
| NAME:      |  |
| SIGNATURE: |  |
| ROLE:      |  |

# 08 Closedown & handover

These documents are used to make sure you're happy that everything has been done that should have been done, and to make sure you're happy to move to the next part of the journey. This includes:

- planned and actual deliverables
- a breakdown of costs
- an assessment of planned versus actual date of each milestone
- a summary of what the next phase of support will be
- summary of any issues that we've all agreed to take into live/BAU
- lessons learned and recommendations
- handover notes into any of your teams, or into ours

These documents are approved by you and by us.

**Gladstone PROJECT CLOSEOUT REPORT**

PROJECT NAME: \_\_\_\_\_

PROJECT MANAGER: \_\_\_\_\_ PROJECT START DATE: \_\_\_\_\_ PROJECT END DATE: \_\_\_\_\_

PROJECT SUMMARY: \_\_\_\_\_

PROJECT ROLES & RESPONSIBILITIES

| NAME | ROLE | RESPONSIBILITIES |
|------|------|------------------|
|      |      |                  |
|      |      |                  |
|      |      |                  |
|      |      |                  |

**Gladstone WARRANTY CLOSEOUT REPORT**

PROJECT NAME: \_\_\_\_\_

KEY CONTACT: \_\_\_\_\_ WARRANTY START DATE: \_\_\_\_\_ WARRANTY END DATE: \_\_\_\_\_

WARRANTY DETAILS

| WARRANTY START DATE | WARRANTY END DATE | KEY CONTACTS | DETAILS OF WARRANTY |
|---------------------|-------------------|--------------|---------------------|
|                     |                   |              |                     |
|                     |                   |              |                     |
|                     |                   |              |                     |
|                     |                   |              |                     |

ISSUES RESOLVED DURING WARRANTY

| ISSUE | STATUS OF ISSUE | STATUS (OPEN / CLOSED) | COMMENTS / ACTION |
|-------|-----------------|------------------------|-------------------|
|       |                 |                        |                   |
|       |                 |                        |                   |
|       |                 |                        |                   |
|       |                 |                        |                   |

