



Sitecore OrderCloud

Project Management Template

Project Roles (net new project)



Role	Key Responsibilities	Recommended staffing size	
Stakeholder*	<ul style="list-style-type: none"> - Defines business goals and scope - Validates features/outcome 	1+	
Project Manager* / BA*	<ul style="list-style-type: none"> - Guides project implementation team based on input from stakeholder(s) 	1	
Technical Roles	Solution Architect*	<ul style="list-style-type: none"> - Technical vision for a specific solution based on business requirements 	1
	Design	<ul style="list-style-type: none"> - Layout and design of application 	1
	Frontend Developer	<ul style="list-style-type: none"> - Creates user experiences to support features 	2-4
	Backend Developer	<ul style="list-style-type: none"> - Creates endpoints that extend the OrderCloud API - Integrates with third party services 	1-2
	Quality Assurance*	<ul style="list-style-type: none"> - Tests new features to ensure they match expectations, are user friendly, and bug free 	1-2

* Starred roles will usually contribute to many projects so their contribution on a single project may require less than indicated

Project Roles (existing project new features)



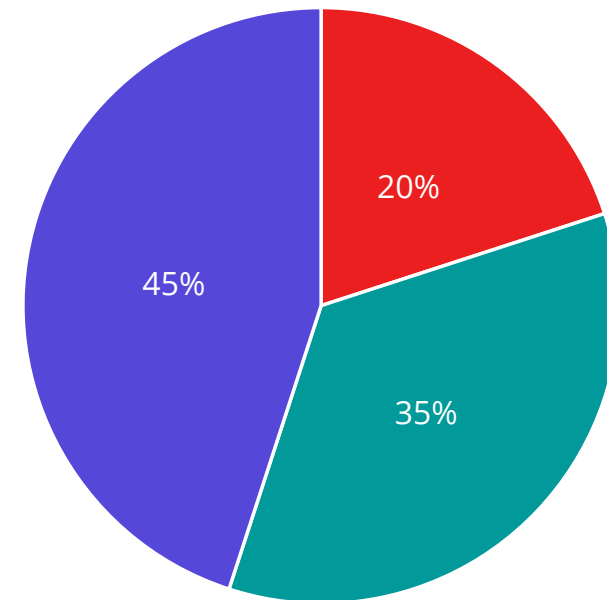
Role	Key Responsibilities	Recommended staffing size
Stakeholder*	<ul style="list-style-type: none"> - Defines business goals and scope - Validates features/outcome 	1+
Project Manager* / BA*	<ul style="list-style-type: none"> - Guides project implementation team based on input from stakeholder(s) 	1
Technical Roles Design*	<ul style="list-style-type: none"> - Layout and design of application 	1
Frontend Developer	<ul style="list-style-type: none"> - Creates user experiences to support features 	1-2
Backend Developer	<ul style="list-style-type: none"> - Creates endpoints that extend the OrderCloud API - Integrates with third party services 	1-2
Quality Assurance*	<ul style="list-style-type: none"> - Tests new features to ensure they match expectations, are user friendly, and bug free 	1

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Typical Project Breakdown

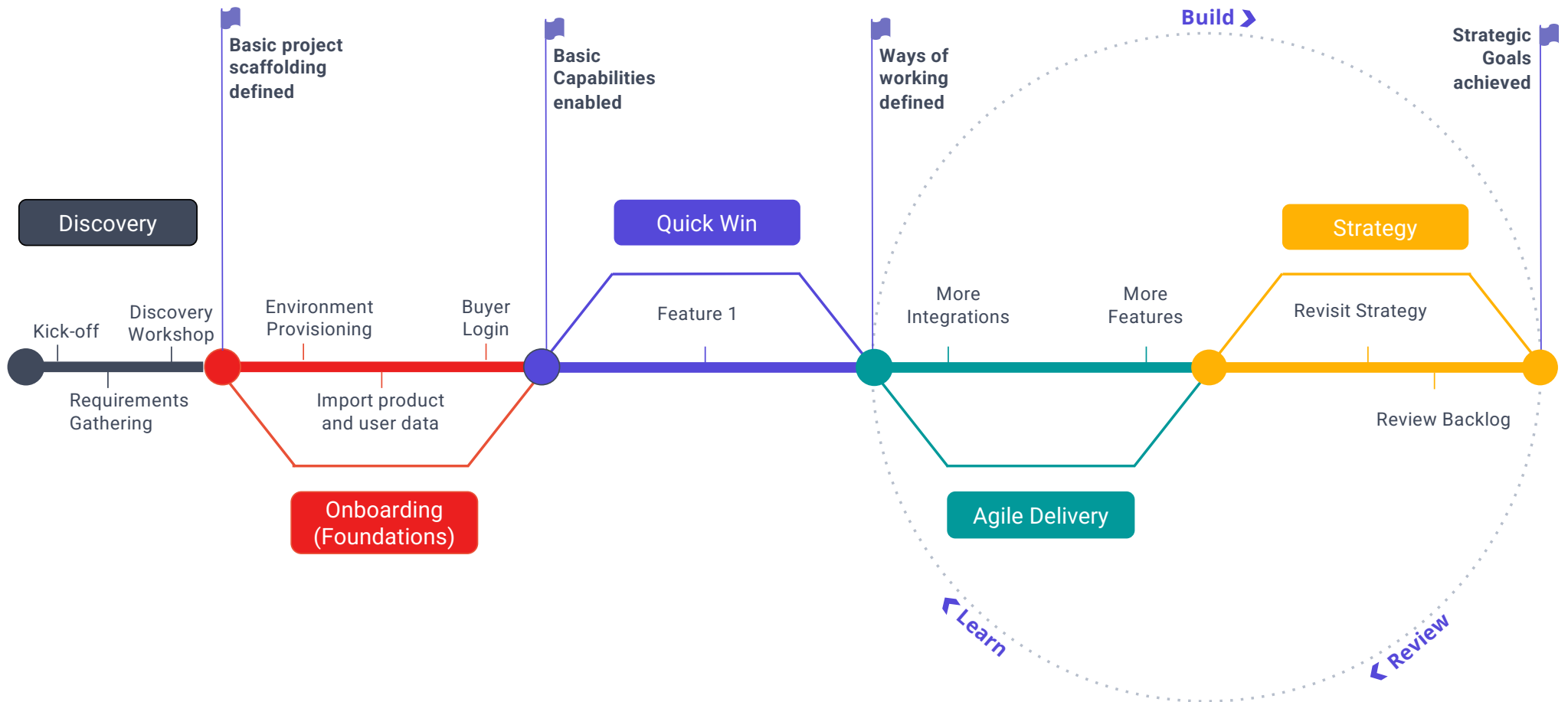
- **Buyer Experience** – Frontend application which serves as the shopping experience
- **Admin Experience** – Frontend application which serves as the admin portal for admins and optionally suppliers (in a marketplace solution) to manage catalog, users, orders, etc.
- **Middleware** – Backend app service for both admin and buyer which includes endpoints that extend the platform as well as third party integrations

Time spent in each domain

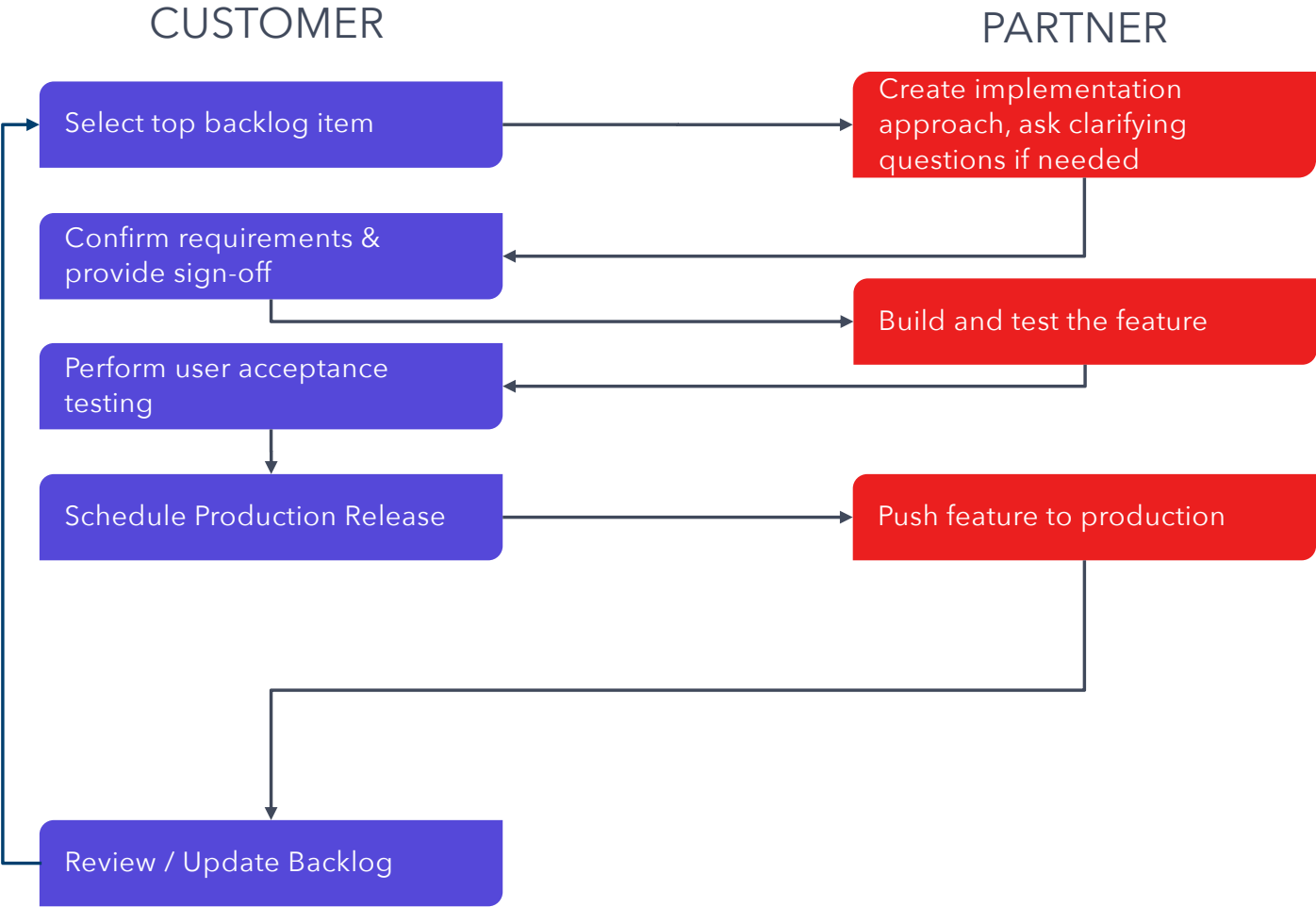


■ Middleware ■ Admin Experience ■ Buyer Experience

Onboarding & Delivery



Feature Delivery Overview



Key data to capture when creating tasks



Data	Description	Example
User Story	Explanation of feature written from the perspective of end user or customer	As a marketplace owner I want to enable abandoned cart emails so that my buyer users are more likely to finalize orders and I can increase my sales
Description	Explanation of feature capturing anything that should be known by the developer to complete this task	<ul style="list-style-type: none">- Carts are considered abandoned after 1 hour of inactivity- A cart is considered inactive if no line items are added, removed, or updated
Implementation Approach	Explanation of developer once task has been picked up from the backlog detailing approach. This forces the developer to think more deeply about an approach which may tease out additional questions to the stakeholder for clarification	<ul style="list-style-type: none">- Create an Azure function with a timer trigger to run every 5 minutes and query the API for any orders where order.LastUpdated is more than 1 hour- For every order found, send an abandonment email to the owner of the order
Dependencies	Any tasks that should be completed prior to this one	Build an abandonment email template

Key data to capture when creating tasks (continued)



Data	Description	Example
Success criteria	One or more key indicators for determining whether this task is complete	<ul style="list-style-type: none">- User receives an abandonment email after an hour of inactivity- Updating an order before the hour is up should extend the lease of their time for another hour
Changelog	Includes dates and times of any key events. This may be kept as its own separate document with notes, date, and initials	<ul style="list-style-type: none">- Implementation Approach created by John Smith on 08/18/2022- Customer requesting reporting feature that will increase scope, processing as change order on 08/20/2022
Additional scope	Includes a description of the increased scope and link to the additional tasks if available	<ul style="list-style-type: none">- Customer requested reporting feature to track how many abandonment emails are sent. Wants to be able to group by buyer as well as time (weekly, monthly). New task is available [here](link-to-task)