

### CLIENT INITIATION AND DISCOVERY

- 1) Determine project setup criteria
  - a) Create **Company + Project**
  - b) Setup **Role Permissions**
  - c) Create **Teams + Staff**
  - d) Confirm **Workflow, Asset Options**
  - e) Create **Bundles** based on project
  - f) Create **Events** based on project scope
- 2) Initial Setup and Imports
  - a) **Custom Field** additions
  - b) Importance Coloring of Field
  - c) **Export Assets** for blank Template
  - d) Normalize (update Data Mapping doc)
  - e) **Import Asset** data (Manage Batches)
- 3) Import Dependencies
  - a) Match AssetID to Name w/ VLOOKUP
  - b) Dependency imports **Post Immediately**
- 4) SME Interview
  - a) Update data as it is **Validated** by SME
  - b) **Pilot, Co-pilot** interview structure
  - c) **Internal Task** creation and follow up

### ANALYSIS AND PLANNING

- 5) Check **Bundles** and **Events**
  - a) Manual creation based on client request, project scope, and internal need
  - b) Assign at least one **Bundle** to each **Event** for eventual asset assignment
- 6) Criteria to determine **Bundles** for Move **Events**
  - a) **Dependency Analyzer**
  - b) Generate **Dependency Groups**
  - c) Purpose of **Dependency Groups** is to create logical **Bundles** for move **Events**
- 7) Generate and re-generate **Dependency Groups**
  - a) Deal with **Remnants**
  - b) Realize potential conflicts
  - c) Check validity of **Asset** records
  - d) Associate **Assets** with **Bundles**
  - e) Assign **Assets** to **Events** by placing them into a **Bundle** within the **Event**

- 8) Begin draft of **Runbook**
  - a) Generate Workflow diagram with client
  - b) Generate **Recipe**
  - c) Determine estimated task durations
  - d) Generate draft of **Runbook**
  - e) Refine, re-generate as needed
- 9) **Event Dashboard** setup
  - a) Which **Workflows** will be tracked?
  - b) **Workflows** chosen in **Bundle**
  - c) **Workflows** assigned in **Recipe**
- 10) **Pre-Event Checklist**
  - a) Check everything prior to TableTop
  - b) Determine changes or flaws and fix
- 11) **Critical Path Analyzer**
  - a) Shows durations for tasks
  - b) Refine **Event** durations
- 12) Setup **Tabletop** scheduling
  - a) Timing of meeting
  - b) Resource availability

### EXECUTION

- 13) Clearly define purpose of **Tabletop**
  - a) Execute **Tabletop**
    - i) **Task Manager**
    - ii) **Task Graph**
  - b) Additional **Tabletops** as needed
  - c) Refinement /Additions to **Runbook**
- 14) Prioritize **Tasks**, further refinement of runbook
  - a) Update **Recipe/Runbook**
  - b) Add manual tasks if necessary
  - c) Update responsibility on **Tasks**
  - d) **Group** vs **Individual** assignment
- 15) Execute migration **Event**
  - a) Open bridge for communication
  - b) All **Tasks** are tracked
- 16) **Critical Path Analyzer** at end of event
  - a) Anticipate changes for next event
  - b) Internal lessons learned meeting