

Milestone List

FILLED EXAMPLE

Customer Portal Modernization

Project: CPM-2026 · Version: Baseline 1.2 · Owner: S. Moreau (Schedule Mgr) · Date: 2026-06-30

1. IDENTIFICATION

Project name	Customer Portal Modernization
Project code	CPM-2026
Schedule baseline version	Baseline 1.2 — re-baselined 2026-06-12 after IAM slip
List owner	S. Moreau, Schedule Manager (PMO)
Status as of date	2026-06-30 (end of June reporting cycle)
Distribution	Sponsor, PM, workstream leads, SRE, Compliance liaison, PMO.

2. LEGEND

A milestone is a zero-duration checkpoint marking an achievement, not an activity. Items marked with an asterisk on the ID are on the current critical path.

2.1 Milestone types

Code	Type	Description
MAJ	Major	Significant programme achievement visible to the sponsor and steering committee.
GATE	Phase-gate	Formal stage-end review with entry/exit criteria and a named approver panel.
EXT	External	Imposed by a party outside the project (regulator, partner, central platform team).
CON	Contractual	Date bound by a signed agreement; breach triggers a penalty or SLA event.

2.2 Status key

Code	Status	Meaning
NS	Not started	Predecessor work has not begun or is too early to forecast.
OT	On track	Forecast date equals planned date (± 3 business days).
AR	At risk	Forecast date slips ≥ 4 business days from planned, but recoverable.
SL	Slipped	Forecast date has moved beyond the float window; critical-path impact.
AC	Achieved	Acceptance signed; evidence filed in the PMO repository.

3. MASTER MILESTONE TABLE

Milestones in schedule order. IDs marked with * are on the current critical path (see §6). Rows where Forecast \neq Planned are flagged in the status column.

ID	Name	Type	Owner	Planned	Forecast	Status	Deps	Notes
M-01	Charter approved	MAJ	R. Patel	2026-03-14	2026-03-14	AC	—	Signed; filed CPM/CH-1.0

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ID	Name	Type	Owner	Planned	Forecast	Status	Depts	Notes
M-02*	Architecture baseline signed off	GATE	A. Silva	2026-04-25	2026-04-25	AC	M-01	ADRs 001–014 approved
M-03*	API contract freeze (6 endpoints)	GATE	A. Silva	2026-05-23	2026-05-23	AC	M-02	OpenAPI v1.0 published
M-04	Data discovery sprint complete	MAJ	K. Becker	2026-05-30	2026-05-30	AC	M-02	24 undoc. fields cataloged
M-05*	IAM MFA integration available	EXT	IAM Team	2026-06-01	2026-06-18	SL	—	17-day slip !' re-baseline 1.2
M-06	Security threat model approved	GATE	Sec Office	2026-06-20	2026-06-22	AC	M-02	2 high-risk items mitigated
M-07*	Portal MVP feature-complete	MAJ	M. Tanaka	2026-07-18	2026-07-25	AR	M-03,M-05	Recovering via scope defer
M-08	Performance baseline run	MAJ	T. Okafor	2026-07-25	2026-08-01	AR	M-07	p95 target 400ms
M-09*	Alpha (internal) release	GATE	M. Tanaka	2026-08-01	2026-08-08	AR	M-07,M-08	Internal users: 120
M-10	Accessibility audit pass (WCAG 2.2 AA)	MAJ	J. Owens	2026-08-22	2026-08-29	OT	M-09	Vendor: AccessLab
M-11	Data migration dry-run #1	MAJ	K. Becker	2026-08-29	2026-09-05	OT	M-04,M-09	Reconciliation "e 99.9%
M-12*	Beta — 100 pilot users live	GATE	M. Tanaka	2026-09-15	2026-09-22	AR	M-09,M-10,M-11	NPS target "e +20
M-13	Regulator briefing #2	EXT	Compliance	2026-10-05	2026-10-05	NS	M-12	Mandate checkpoint
M-14	Penetration test clean	GATE	Sec Office	2026-10-20	2026-10-20	NS	M-12	Zero P0/P1 findings
M-15	Data migration dry-run #2 (prod-like)	MAJ	K. Becker	2026-10-27	2026-10-27	NS	M-11	Cutover rehearsal
M-16*	Go / no-go decision	GATE	R. Patel	2026-11-08	2026-11-08	NS	M-13,M-14,M-15	Steering committee vote
M-17	Customer comms wave 1 out	CON	J. Owens	2026-11-15	2026-11-15	NS	M-16	T-3 weeks notice clause

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ID	Name	Type	Owner	Planned	Forecast	Status	Depts	Notes
M-18*	Production go-live	MAJ	M. Tanaka	2026-12-06	2026-12-06	NS	M-16,M-17	Cutover window 02:00–06:00
M-19	Regulator mandate achieved	EXT	Compliance	2026-12-31	2026-12-31	NS	M-18	Hard regulatory deadline
M-20	Hypercare exit	MAJ	T. Okafor	2027-03-06	2027-03-06	NS	M-18	Close-out report due +14d

4. PHASE-GATE DETAILS

Four phase-gates carry formal approval. Each has written entry and exit criteria and a named panel.

4.1 Gate G1 — Architecture Baseline (M-02, 2026-04-25)

- Entry: Charter approved (M-01); 14 ADRs drafted; non-functional requirements set captured; vendor stack short-listed.
- Exit: ADRs signed by Chief Architect; NFR targets agreed with SRE; cost estimate within $\pm 15\%$ of envelope; risk register updated.
- Approvers: Chief Architect (A. Silva), Head of SRE (T. Okafor), Security Office (D. Rahman), PM (M. Tanaka).

4.2 Gate G2 — API Contract Freeze (M-03, 2026-05-23)

- Entry: 6 OpenAPI documents drafted; contract tests in CI; consumer teams identified and consulted.
- Exit: OpenAPI v1.0 tagged; developer portal stub live; deprecation policy documented; SLA targets agreed.
- Approvers: Platform Lead (A. Silva), Open-Banking Product Owner, Consumer Lead (Mobile team), PM.

4.3 Gate G3 — Beta Entry (M-12, 2026-09-22 forecast)

- Entry: Alpha retro closed; WCAG 2.2 AA audit passed; data dry-run #1 at "e 99.9% parity; P0/P1 defects = 0.
- Exit: 100 pilot users enrolled; support runbook v1 accepted; rollback plan exercised; sponsor sign-off.
- Approvers: Sponsor (R. Patel), PM, Head of Customer Care (L. Nguyen), Security Office.

4.4 Gate G4 — Go / No-Go (M-16, 2026-11-08)

- Entry: Regulator briefing #2 complete; pen-test clean; prod-like dry-run executed; hypercare rota confirmed.
- Exit: Steering committee vote recorded; cutover CAB approved; comms wave 1 authorised; rollback owner named.
- Approvers: Sponsor, PMO Director (F. Abiola), Chief Risk Officer, CIO delegate.

5. EXTERNAL MILESTONES

#	External milestone	Source / clause	Fixed date	Risk if missed
1	IAM platform MFA ready (M-05)	Central IAM programme charter, §4.2	2026-06-01	Blocks portal auth; 17-day slip already consumed float. Mitigation: stub + phased cutover.

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#	External milestone	Source / clause	Fixed date	Risk if missed
2	Regulator briefing #2 (M-13)	Regulator letter 2025-11-14, annex B	2026-10-05	Missed briefing !' mandate marked non-compliant; escalation to supervisor.
3	Customer comms wave 1 (M-17)	Customer contract §9.3 — 3-week notice clause	2026-11-15	Breach of contractual notice period; customer complaints and potential small claims.
4	Regulator mandate in force (M-19)	2025 Open Banking Directive, art. 31	2026-12-31	Hard deadline. Projected fine: \$1.8M + public enforcement notice. Non-negotiable.

6. CRITICAL-PATH INDICATORS

The current critical path (baseline 1.2) runs through the gates on the left; any slip propagates directly to the regulator deadline (M-19).

- Critical path: M-02* !' M-03* !' M-05* !' M-07* !' M-09* !' M-12* !' M-16* !' M-18*.
- Total float on the critical path: 0 business days (go-live), 18 business days to regulator (M-19).
- Nearest non-critical run: M-04 !' M-11 !' M-15 has 12 business days of slack.
- Concentration of risk: M-05 to M-12 (IAM !' Beta entry) carries 4 of the 5 top risks in the register.
- Early-warning trigger: any forecast slip of > 3 business days on M-07 or M-09 escalates to sponsor within 24h.

7. CHANGE LOG

Date	Milestone	Change	Rationale	Approved by
2026-04-28	M-04	Added data discovery sprint	Undocumented Oracle fields discovered during architecture work (R-02 materialised).	R. Patel
2026-06-12	M-05, M-07, M-09	Re-baselined 1.1 !' 1.2: +7 business days on M-07 and M-09	IAM MFA slipped 17 days; 10 days absorbed by stubbing, 7 pushed downstream.	Steering Cmte
2026-06-18	M-06	Moved from 2026-06-20 !' 2026-06-22	Security Office annual offsite; negligible float impact.	D. Rahman
2026-06-25	M-08	Forecast +5 business days	Performance environment not ready; capacity team engaged.	T. Okafor
2026-06-28	M-10	Vendor changed from InclusiveX to AccessLab	Procurement finalised; AccessLab 18% cheaper with same scope.	F. Abiola
2026-06-30	M-12	Forecast +5 business days (on top of +2 from baseline 1.2)	M-09 slip carried forward; beta cohort comms already drafted for new date.	R. Patel

APPROVALS

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Schedule Manager

S. Moreau

PMO — Schedule

Signature

Date

Sponsor

R. Patel

VP, Digital Channels

Signature

Date

Project Manager

M. Tanaka

Senior PM, PMO

Signature

Date

PMO Director

F. Abiola

PMO, Retail Banking

Signature

Date

