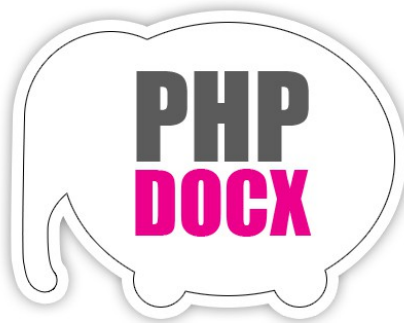# Project Introduction & Rationale

**Juliana Koh**

Test

Test

Test, Test, Test

13 October 2014

Juliana Koh

# 1. About this document

This document provides an introduction to, and summary of, the **Juliana Koh** project that we believe will provide significant operational, service and financial benefits to **Test** and its stakeholders.

It is provided to:

1. Inform stakeholders about our proposed project, resulting systems and key benefits; and

2. To assess and attain the, financial commitment, enthusiasm and endorsement to progress it further.

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Conclusion and Next steps <span style="color:#5b9bd5">Project objectives and benefits</span>

This document provides an introduction to, and summary of, the **Juliana Koh** project that we believe will provide significant operational, service and financial benefits to **Test** and its stakeholders.

Assuming that the project progresses we anticipate that it will be completed by **30 November -0001**, at an expect cost of **Juliana Koh**.

## Contribution to Test mission

Juliana Koh

## Contribution to Test goals

 Juliana Koh

## Operational savings / Return on Investment

This project is intended to generate ongoing savings/returns against the initial financial investment. Should the project proceed to the next planning phase the returns will be quantified through completion of comprehensive functional requirements.

At this stage are expecting to create efficiencies and reduce errors in the **7** areas listed below in the project scope section of this document.

## Non-financial benefits

In addition to the financial savings we are also expecting to achieve improvements in our operations and service through automation, systemisation and enabling 'self-service' for the following groups:

| Stakeholder group |
|---|
| Test |

## 2. Project Scope

We have identified **7** functional areas that the implemented system will facilitate, these are listed below.

The project scope will be further defined by specifying a list of key features within each of these functional areas.

The Project Detail Document (a key deliverable of the next project phase), will contain:

- Estimates return on investment (ROI), saving per year based on the current operations costs, and

- Expected non-financial stakeholder / constituencies benefits of these functional areas.

At this stage new additional revenues are not estimated or included in this documentation.

## Functional areas to be implemented

The identified functional areas to be implemented are:

## Contact Database

In almost all membership system builds, whether on or off line, the contact database is a central feature. It is mandatory to the implementation of a working membership system.

Your contact database records information on all of your constituency, independent of their relationship to your organisation. These attributes (for example, subscriber, current member, committee member) all refer back to the central contact database.

A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Contact database features include:
- Adding new contact details
- Managing and editing contacts and status
- Manage access and user permissions

## Membership Application

Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.

Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.

Key Membership Application features are:
- Individuals / corporations can apply for membership via the public website
- Members can choose applicable options and levels
- Communications and payments are handeled by the system

## Marketing Communications

Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.

 Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

 Key features include:
 - Newsletters (as well as notifications to individuals) can be sent from the system
 - Subsets of database can be chosen based on a range of profile information and/or custom segments
 - Statistics are available to allow analysis of success of communication


## Events Registration

The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.

 A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.

 Key features include:

 - Events can be quickly and easily published onto the website
 - Members receive different event pricing to non-members
 - Registrants can purchase tickets to all events in a suite of events or purchase in groups


## Event Administration

The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.

 Key features include:

 - Seating allocation can be done automatically but with manual override as required
 - Name tags can be automatically generated for event
 - Follow up emails can be sent to both attendees and non-attendees after event

## Continuing Professional Development

Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.

The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- CPD goals and points can be set-up flexibility in the system
- Members can be prevented from renewing their membership if CPD goal(s) have not been met
- Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition


## Online Store

Online stores, or mechanisms to purchase products and resources can drive considerable revenue for Associations. They are also becoming quicker and easier to build into online platforms. In combination with a willingness to purchase online, this means that the ability to generate revenue from selling merchandise and products via your website is becoming increasingly attainable and popular.

Online stores can range dramatically in complexity and sophistication, so truly specifying and costing this area of functionality can be difficult.

Key features include:

- Any number of categories/subcategories of products can be defined
- Online payment can be taken flexibly via payment systems
- Different shipping methods and pricing can be configured

# **3.** Price, Process, Timelines & Milestones

We intend to "go-to market" to finalise pricing, however we are provisionally recommending a project budget of **Juliana Koh**.

In addition to the financial costs, the project will also require the time, input and enthusiasm of the following team members listed in the Roles and Responsibilities section below.

## Timeline & milestones

The project duration is expected to be **0** days.

- The intended start date is: **30 November -0001**

- The target completion date is: **30 November -0001**

The project will include key milestones, these will help us monitor and keep the project on time and budget.

The milestones are not finalised, but are likely to include:

| Milestone No. | Milestone name | Date |
|---|---|---|
| 1 | Project Commencement | 30 November -0001 |
| 2 | Supplier engaged | 30 November -0001 |
| 3 | Scoping and planning complete | 30 November -0001 |
| 4 | Interface design complete | 30 November -0001 |
| 5 | Development complete | 30 November -0001 |
| 6 | User testing complete | 30 November -0001 |
| 7 | Training complete and system live | 30 November -0001 |
| 8 | Project Completion | 30 November -0001 |

# **4.** Internal team roles

Successful execution of the project will require the input and participation of a number of team members, these are listed below along with their anticipated roles and responsibilities.

The next stage of the project will include more detail on this including estimated effort and individual responsibilities.

## Project team

The project team leader is **Test.**

| Team member |
| --- |
| Test |
| Test |

## **5.** Conclusion and Next steps

To achieve the benefits we propose to deliver the project following the milestones outlined.

The next step is to specify the project process and system functionality in greater detail. This will be captured in a 'Project details' document which will be the primary reference for all stakeholders.

Please contact Test on test1@test.com which questions and your feedback.