Project Introduction & Rationale

**Juliana Project <script type="text/javascript"> <script type="text/javascript">**



34 Soft Interactive Pvt Ltd

E 196 Phase 8B Industrial Area Phase 8

Mohali, Punjab, 160055

28 October 2014

Vivek Mahajan <script type="text/javascript"> <script type="text/javascript">

# About this document

This document provides an introduction to, and summary of, the **Juliana Project <script type="text/javascript"> <script type="text/javascript">** project that we believe will provide significant operational, service and financial benefits to **34 Soft Interactive Pvt Ltd** 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.

# TABLE OF CONTENTS

Executive summary

Key Objectives

Operational savings / Return on Investment

Non-financial benefits

Project Scope

Functional areas to be implemented

Costs and timelines

Timeline & milestones

Roles and responsibilities

Conclusion and Next steps Project objectives and benefits

This document provides an introduction to, and summary of, the **Juliana Project <script type="text/javascript"> <script type="text/javascript">** project that we believe will provide significant operational, service and financial benefits to **34 Soft Interactive Pvt Ltd** and its stakeholders.

Assuming that the project progresses we anticipate that it will be completed by **29 September 2014**, at an expect cost of **76676 <script type="text/javascript"> <script type="text/javascript">**.

## Contribution to 34 Soft Interactive Pvt Ltd mission

jhgjhg <script type="text/javascript"> <script type="text/javascript">

## Contribution to 34 Soft Interactive Pvt Ltd goals

bnmbnm <script type="text/javascript"> <script type="text/javascript">

## 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 **13** 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 |
| mahajan corp |

# Project Scope

We have identified **13** 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 management  
  
Members are the lifeblood of the organisation, delivering services to them and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.  
  
 The level of functionality required to support the management of your membership data and membership interactions will vary with the complexity of your membership structures and the overall level of automation and interaction you require.  
  
 Closely tracking and growing membership numbers is often a primary goal and key revenue generator, so storing and (quickly and flexibly) accessing information on them is essential.  
  
 Key Membership Management features include:  
 - Membership cycles can be defined (calendar year, pro-rater etc)  
 - Membership levels and pricing can be configured  
 - Membership reporting tools  
  
  
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  
  
  
Membership renewal  
  
Allowing members to renew through your website in a simple and intuitive way will also create significant cost savings.  
  
 It also represents improved service and convenience to many who are happy using the internet to make payments. It allows members to renew any hour of the day or night from anywhere. This convenience can be the difference between the renewal and a lapsed member.   
  
 Key features include:  
 - Automated notifications of membership expiry  
 - Members can modify their membership types, interests and settings  
 - Online payments processed for renewals  
  
  
Member Services/benefits  
  
Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.   
  
 Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase the attractiveness of your offerings, enable you to upsell your memberships and encourage members to continue to maintain their membership.   
  
 Key features include:  
  
 - Members can update there own details at any time  
 - Different levels of memberships can have access to different information/services  
 - Non-members (contacts or lapsed members) can also update details  
  
  
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  
  
  
Member Directory  
  
In some cases the publication of certain membership details back to the website is necessary. This often occurs amongst networking groups or where members are organisations and the organisational details are being published.   
  
 These directories or lists can be published publicly or log in only areas. 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:  
  
 - Members receive directory listings as part of their membership benefits  
 - Details to be included in the directory can be configured  
 - The member directory can be filtered by a range of custom options  
  
  
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  
  
  
Order Management  
  
If you require to take online payments you will need also to manage the related orders. These orders might be membership payments, events bookings or product purchases. Each will require actioning and reconciliation. This is therefore an essential feature if payments are to be processed.   
  
 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:  
  
 - A range of online payment gateways are supported  
 - Orders can be processed through a number of different statuses reflecting your processes  
 - Integration with common accounting packages is available  
  
  
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  
  
  
Website Content Management  
  
Websites are a critical channel of communication for Associations. To keep a website up to date, fresh, relevant and attractive to search engines the content on the site should be modified and updated regularly. It is therefore essential that this task can be easily and quickly managed by non-technical personnel.   
  
 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:  
  
 - All site content can be managed by non-technical administrators  
 - Menu structures and Information Architectures (site maps) can managed  
 - Content approval workflow is supported  
  
  
Resource Library  
  
Many membership organisations have accumulated a considerable library of resources that need to be readily accessible to either to the public or, more often, available only to members as a benefit of membership.   
  
 The usefulness of this library is predicated on it being easily browsed or filtered via a variety of meta data relevant to the resources and their application.   
  
 Key features include:  
  
 - Resources within the resource library can be publicly available or restricted to members  
 - Metadata to be assigned to resources can be configured  
 - The resource library can be browsed by category or search/filtered by metadata

# Price, Process, Timelines & Milestones

We intend to "go-to market" to finalise pricing, however we are provisionally recommending a project budget of **76676 <script type="text/javascript"> <script type="text/javascript">**.

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 **25** days.

* The intended start date is: **04 September 2014**
* The target completion date is: **29 September 2014**

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 | 04 September 2014 |
| 2 | Supplier engaged | 12 September 2014 |
| 3 | Scoping and planning complete | 15 September 2014 |
| 4 | Interface design complete | 18 September 2014 |
| 5 | Development complete | 21 September 2014 |
| 6 | User testing complete | 24 September 2014 |
| 7 | Training complete and system live | 27 September 2014 |
| 8 | Project Completion | 29 September 2014 |

# 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 **Vivek Mahajan<script type="text/javascript">.**

|  |
| --- |
| Team member |
| Vivek Mahajan<script type="text/javascript"> |
| Kimti<script type="text/javascript"> |

# 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 Vivek Mahajan<script type="text/javascript"> on vivek.mahajan@hit.com which questions and your feedback.