PROJECT PLANNING PHASE

🎯 Objective of This Phase

To establish a strong foundation for the successful implementation of the Airlines Management System by:

- Defining scope, requirements, and stakeholders
- Identifying risks and dependencies
- Creating a roadmap with timelines and resources

📋 1. Project Initiation

Step	Description
1.1 Define Goals & Vision	Align business objectives (e.g., improve CX, automate operations) with Salesforce capabilities.
1.2 Appoint Stakeholders & Governance Team	Identify project sponsor, business owners, Salesforce architects, IT leads.
1.3 High-Level Use Case Mapping	Define major areas: Booking, Support, Loyalty, Marketing, Integration.

📋 2. Requirement Gathering

Step	Description
2.1 Conduct Discovery Workshops	Meet with business teams: Sales, Customer Service, Marketing, IT, Operations.
2.2 Define Functional Requirements	E.g., case management, booking updates, loyalty program workflows.
2.3 Define Technical Requirements	APIs, integration points (GDS, PSS), authentication, security.
2.4 Prioritize Requirements	Use MoSCoW method (Must, Should, Could, Won't).

⚙️ 3. Solution Design (High-Level)

Step	Description
3.1 Create Solution Architecture	Cloud components (Sales, Service, Marketing, MuleSoft, Tableau).
3.2 Identify Customization vs Configuration	Assess what needs Apex development or Lightning Web Components.
3.3 Integration Design	Define systems to connect with Salesforce (PSS, baggage, loyalty).

🔧 4. Project Planning & Execution Strategy

Step	Description
4.1 Define Project Scope & Deliverables	Scope by phase: MVP (Support + Booking), Phase 2 (Loyalty + Marketing).
4.2 Develop Work Breakdown Structure (WBS)	Breakdown into modules, epics, user stories.
4.3 Create Timeline & Milestones	Gantt chart or sprint-based timeline (Agile or Hybrid).
4.4 Assign Resources	Roles: Project Manager, Salesforce Admin, Developer, QA, BA, Integration Lead.

⚠️ 5. Risk Assessment & Mitigation Plan

Risk Area	Potential Risks	Mitigation Strategies
Scope Creep	Extra feature requests mid-way	Strong change control process
Integration Delays	External system complexity	Early API documentation + sandbox testing
Data Quality	Incomplete or dirty passenger data	Data cleansing during planning
User Adoption	Poor usage by airline staff	Include training & UAT in early plans

📊 6. Success Metrics & KPIs

Metric	Target
Customer Case Resolution Time	Reduced by 30% within 6 months
Agent Productivity	+25% using automation and AI
Passenger NPS	+10 point increase
Upsell Conversion (via Marketing Cloud)	+15% improvement

📅 7. Sample Timeline (MVP Release)

Phase	Duration	Key Deliverables
Planning & Design	3–4 weeks	Requirements, Architecture, Project Plan
Development (Sprint 1–4)	8–10 weeks	Booking Mgmt, Support Cases, Integration APIs
UAT & Training	2 weeks	UAT scripts, end-user training
Go-Live	1 week	Deployment & post-launch support

☑ Deliverables from Planning Phase

- ✅ Requirements Document (BRD/FSD)
- ✅ High-Level Solution Architecture
- ✅ Project Plan with Milestones & Timeline
- ✅ Resource Plan & Roles Matrix
- ✅ Risk Register
- ✅ Success Metrics