FAMILY BANK LIMITED

**DRAFT PROJECT IMPLEMENTATION PLAN**

**FOR**

**FAMILY BANK INTRANET,**

**VERSION 2.0**

1. **Introduction**

**1.1 Background and Context**

This document is authored in preparation for an exercise to upgrade core functionality and outputs for the SLA management feature for The Family Bank Intranet. The core purpose of the exercise is to achieve superior performance reporting and management functionality for the system.

1. **Project Objectives**

At the end of this exercise, the implementation team looks forward to fulfilling the following outcomes for Family Bank:

**2.1 Comprehensive Business Model Documentation and Archiving**

* This shall entail garnering a detailed repository of process and workflow data which shall in turn be digitized and centralized in such a way as to be readily accessible to authorized persons on an easy to read interface.
* This repository shall act as a resource centre for persons involved in design, approval and authorization of process document as well as final deployment of process automation tools via the Family Bank Intranet.

**2.2 Set up Performance Management Structures and Practice**

* We intend to avail the business process management platform as a tool for performance management, both in terms of reporting (e.g. creation of timely, accurate metrics on various aspects of work output at the departmental, branch and individual level), as well as supporting the functions involved in creation, analysis, dissemination and application of this information.

**2.3 Set the Basis for Continuous Process Improvement**

* Set up Reporting Mechanisms based on key performance metrics (throughput, efficiency, load and turnaround / lag time)
* Identify Measurements
* Design reports
* Set up mechanisms to support the process of continuously identifying, reporting and remedying shortcomings

1. **Scope**

The scope of this project shall include:

**3.1 Building a Functions Catalogue**

* This process will entail creating a structured description of the functions captured in the various service level agreements.
* This description shall include all specific tasks in the workflow chain underlying each SLA term, and the roles responsible for specific outcomes, inputs, outputs and fail safe measures. This shall also attempt to capture all applicable turnarounds for specific tasks that make up the deliverables envisaged in each SLA.

**3.2 Audit and Compilation of Workflow Scenarios for each SLA**

* This shall entail circulation and discussion of the functions catalogue for approval and authorization by the roles responsible for each respective function within Family Bank.
* At this stage, we shall also separate functions that require to be captured partly or wholly within the System as opposed to those that are addressed entirely by other enterprise applications such as the presently installed core banking and human resource information management systems and so forth.

**3.3 Workflow charting for designated Functions**

* Having determined which functions need be managed in the System, we shall then proceed to create workflow charts using the Business Process Management Notation (version 2) standard.

**3.4 Workflow Simulation and Testing**

* This shall involve use of our process mapping software to interrogate workflow charts arrived at as described in 3.3 above in order to detect any logical discrepancies that may have inadvertently crept into the function documentation process.

**3.5 Workflow Automation**

* This step shall involve deployment of workflow automation tools, such that roles involved in the functions earmarked for automation shall be able to access workflow information from within the Process Management system

**3.6. Exclusion**

* The scope of this implementation shall specifically exclude:

*3.6.1 Integration*

Functional Integration with other systems e.g. Payroll, Core Banking is NOT envisaged as part of the exercise at hand

*3.6.1 New Interfaces and Functionality*

We intend that the scope of this exercise shall exclude provision of add-ons and extensions intended to enable functions, support new role types presently not represented in the system’s user directory (e.g. suppliers or customers) or means of accessibility beyond what the current installation of the system supports (i.e. browser-based access as described in appendix I)

1. **Organisation, Roles and Key Responsibilities**

**5.1 Project Board**

5.1.1 Description

This will be a high-level team with representatives from both Family Bank and Wonderkid, convened to oversee matters of overall milestones, key deliverables, issues that touch on the contractual basis of this project and other matters that affect the project in a fundamental way.

5.1.23 Suggested Composition

1. Marilyn Adell, General Manager, Wonderkid Multimedia
2. Allen Citta, Director of Sales, Wonderkid Multimedia
3. Family Bank Nominee (preferably a senior executive in Human Resources)
4. Family Bank Nominee (preferably a senior executive in ICT)

5.1.3 Responsibilities

1. To ensure that contractual terms of the agreement are agreed upon, executed and observed
2. To deliberate and approve any substantial changes to this implementation plan
3. To evaluate and

**5.2 Project Implementation Team:**

5.2.1 Description

Reporting to the project board, this team shall be responsible for day to day outcomes and deliverables as envisaged in the schedule of milestones.

5.2.2 Suggested Composition

1. Mathew Ngugi, Business Development, Wonderkid Multimedia
2. Pascal Mwele, Technical Services Manager, Wonderkid Multimedia
3. Family Bank Nominee (preferably hands-on operative in Human Resources)
4. Family Bank Nominee (preferably hands-on operative in ICT)

5.2.3. Responsibilities

1. Project Implementation
2. Project Documentation
3. Project reporting
4. **Key project deliverables**

At each phase of the project, we anticipate that the following outcomes shall be met:

**Phase 1: Planning**

1. Building awareness within the business of the software solution through communication
2. Developing business support and momentum to use the solution through stakeholder engagement
3. Planning and executing the training plan for business users and administrators
4. Business plan to exploit the use of the solution and to scale up the numbers of users

**Stage 2: Implementation**

Generation of Performance Reports for all staff activities pertaining to company functions designated in the functions catalogue

**Stage 3: Process Improvement**

Setting up functionality and structures to support adequate analysis of data and the capacity to effect broad adjustments to workflow patterns on a day to day basis without need for direct technical intervention

1. Setting up and operating a process improvement board to take over the day to day management and evolution of the solution