

Project Charter Onderwijs in Beeld

Abstract

Onderwijs in Beeld is a SaaS company in need of an automated system for their invoicing in order to save time and effort. This is important because they are a growing company, and the time spent on invoices will increase significantly over time. Delly Müller and Johan Titulaer will provide advice and design for this new workflow in an upcoming report.

Introduction

Onderwijs in Beeld is a Dutch SaaS company with 4 employees. They have developed 'de Leesapp' which is a software product aimed at elementary schools, providing them with a library system to store and borrow books. What makes the Leesapp unique is that it provides insights and recommendations on books read by students to improve the reading skills of individual students with an algorithm comparable to Spotify's "More like this". Currently Onderwijs in Beeld has around 140 different schools as their customers and are aiming to reach a total of around 2000 schools in the next 5 years.

Every year in September, which is the start of the school year, an annual payment needs to be done by the customers. In the current situation these invoices are sent manually to these schools and it takes around 2 days time to send them all out. Moreover, every time a new school purchases the Leesapp, Onderwijs in Beeld also has to manually send out the invoices for them, since schools can apply at any given time of the year.

For scalability reasons, OIB would like to have an automated invoicing system, so there won't be any manual invoicing needed, which will save them weeks of work every year. Customers will have a seamless experience in purchasing the product and OIB will get paid without having to contact the customers themselves. The point of this project is to provide a report with advice and design for OIB to start their projects and implement it as they desire. This report will be available to them towards the end of June and save them the work of designing this issue themselves.

Business Case

Currently OIB has:

- a customer base of 140 schools, which takes around 2 days of work to send out the invoices to manually;
- to spend time with 1-4 new customers per month by sending invoices and instructions, which sometimes can take half a day per customer.

In the next five years, OIB will have:

- a customer base of around 2000 schools, which will take about 28 days of work to manage the invoices;
- to spend with estimated 10+ customers per month by sending invoices and instructions, which could result in 5 full days of work effort.

It is possible to prevent the full month of work and 5 days per month entirely by introducing an automated invoicing system. Developing this new system would take around 2 months of work and will reduce future work tremendously, by cutting three months of work annually.

Because OIB is a growing company and wants to become the market leader in school library systems, it is highly recommendable to tackle this issue as soon as possible.

Approach

From the start of our project, we will have an effort of 3-4 days per week and we will then make use of an Agile/Scrum workflow. We have done a few interviews prior to the project so we already started with an analysis of the current situation. We will develop on this further, provide KPI's and measurables, give advice and finally a design.

Interviews will be held off-weekly with Stijn Dautzenberg on Google Meets to ask for details as well as measure the satisfaction with the workflow and deliverables. The goal is to provide a final report by the end of June. We will make use of all the information provided during interviews and will summarize it and work it out through means like this project charter before we work on the final report. In all of this we will be supported by our teachers at Fontys University Venlo.

In Scope

- Analyzing requirements;
- Specify current situation;
- Data handling (privacy);
- Advice for a new workflow solution based on deliverables;

Out of Scope

This project does not include the implementation in the form of programming and testing. We will also not provide any support after the report has been finalized.

Deliverables

This project will deliver:

- Interview protocols and their feedback regarding the analysis of the requirements;
- BPMN diagrams with descriptions on the current business processes, subprocesses and the desired business processes solution;
- Advice report at the end of this project consisting of the artifacts gathered in this project with a new workflow;

Quality Management

To ensure this project's quality, we will adhere to standards where applicable:

- For the diagrams, we will be using the BPMN workframe;
- For the deliverables we will be adhering to the standards at Fontys, based on Business Processes literature;
- For any information used from the company, we will keep it confidential;
- As the quality representatives Dely Müller and Johan Titulaer, who is an employee at OIB, will be responsible in the end.

Prerequisite

In order to proceed successfully with this project certain conditions must be met with:

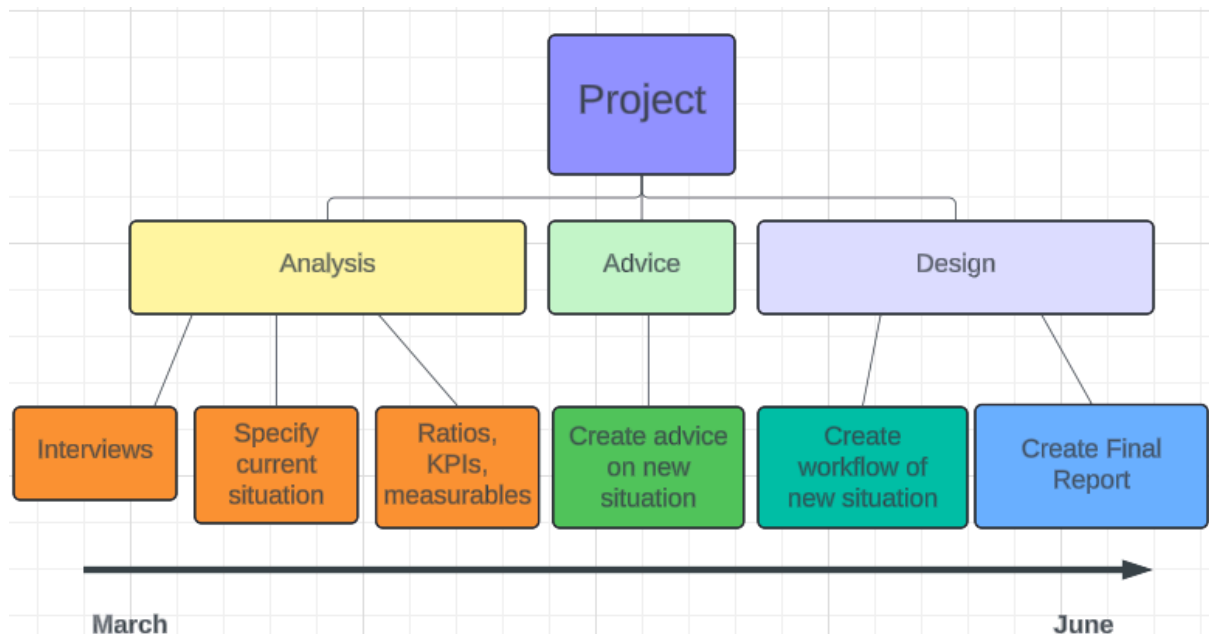
- Contact information of Stijn for feedback and control of the deliverables;
- Conferencing platform e.g. Google Meet;
- BPMN workframe e.g. Visual Paradigm;
- Office program for documents e.g. Google Docs;

Success Criteria

In order for the project to be successful we will be using specific acceptance Criteria:

- A clear description with diagram of the current workflow with its consequences and work efforts linked;
- A clear description of the possible future workflow (advise) with its benefits;
- A clear description on how data can be handled in a secure way;

Work Breakdown Structure



A visual representation of the work breakdown structure:

- During the first weeks we focus on interviews to get all the necessary information, specifying the current situation so we have a mutual understanding and finally to provide clear indicators on the effects and efforts needed for the project to succeed. In this analysis, we will provide diagrams to ensure that we understand the situation clearly.
- After the analysis has been completed we create an advisory workflow for the new situation, which encapsulates both advice and design.
- Finally we will create a report that includes all necessary information for OIB to get started on their projects regarding the automated invoicing system.