

# Final Project: From Methodology to Execution

## *Digital Project Management*

### Step 1) Study the Scenario

#### Overview

You are a project manager for Yosemite, an eCommerce company that integrates brick-and-mortar stores onto its platform for a fee. It's the third Tuesday in September; you have been assigned to work with The Stefano Shop, a family-run business that had been a local success but was struggling to stay open. The primary business goal is to digitize the store's operations and sales and complete this project a week before Christmas in the U.S.

Integrating The Stefano Shop onto Yosemite means building the following features: a storefront on the platform, a social media integration, and a recommendation engine. The Stefano family, which consists of Papa Stefano, Mama Stefano, and Junior Stefano, will also require the training and knowledge to operate their digital store once it has been developed.

At Yosemite, you have access to the Engineering, Vendor Management, and Marketing teams. The Engineering team will need up-to-date information on the store's inventory from the customer. The Vendor Managers can onboard and train whoever will manage the storefront on Yosemite's platform. The Marketing team can set up the social media channels but will have to hand off the account's ongoing management to someone at the Stefano's.

#### Project Budget

The Yosemite storefront, training, and documentation can be delivered for \$15,000 - a tight budget for the Stefano's. So Papa Stefano asked that you include a cost-benefit analysis in the project scope to reassure him this is a good investment.

For the cost-benefit analysis, your research shows:

- The Stefano Shop's current annual revenue is \$120,000
- The eCommerce industry discount rate is 7%
- Yosemite promises a 30% increase in revenue (\$36,000)
- And the cost of this project will be \$15,000 upfront

#### Getting the Job Done

The Engineering team has to deliver three main features: the storefront, social media integration, and a recommendation engine. Each of those features can be completed in a two-week sprint. The tasks involved in each sprint are design, build, test, and release. You, as the project manager, can recommend building out

all features before the store goes live on Yosemite. Or you can recommend releasing a minimum viable product—a live storefront—then later adding the other features: the social media integration and a recommendation engine.

The Vendor Managers, as part of the storefront deliverable, have the task of inputting all inventory data. That task would take a week and is dependent on the Engineering team completing the first deliverable. Then the Vendor Managers will spend a week onboarding and training the Stefano's on how to use the Yosemite platform. This task should occur before the store goes live. During or after the recommendation engine deliverable is released, the Vendor Managers will have to create a custom sales report that is automatically sent to the Stefano's with results on how the recommendation engine impacts sales. It takes a week to set up the automated report.

The Marketing team is tasked with creating the social media channels and handing off its ownership to Stefano's, which takes a week. But this task must occur before Engineering's second feature: social media integration.

## The Cast of Characters

- **Papa Stefano** - store co-founder; Papa Stefano has a strong presence in the family business but listens to Mama Stefano while making a business decision. He manages the floor and is averse to new technology. While he understands it's time to modernize the shopping experience and would like to gain new customers, he's wary of going over budget.
- **Mama Stefano** - store co-founder and certified accountant; she keeps spreadsheets to track inventory and has convinced Papa to work with Yosemite. Her primary focus is on back-end administrative tasks of the business. Mama is more concerned about getting the store ready in time for Christmas shoppers.
- **Junior Stefano** - The Stefano daughter is a student and is still learning the family business. She hopes to take over the family business one day; Junior creates social media posts on her own accounts for the store. She sees value in taking full advantage of Yosemite's services.
- **Moe** - the Yosemite Vendor Manager tends to be enthusiastic about upselling customers with additional services; not mindful of budget. Moe primarily focuses on promoting and coordinating Yosemite's services, which constitutes a part of the overall project. Additionally, this project is one of many he works on.
- **Aliyah** - the Yosemite Engineering Lead is experienced and skilled. She prefers to work in Agile sprints but understands that not all customers can keep up with that pace. Her expertise in developing and implementing technical solutions enables her to guide the project's timeline and execution strategy, making her vital in determining the project's overall direction and progress.
- **Taylor** - the Yosemite Marketing Manager tends to take on too many assignments and can delay getting tasks completed. Taylor often needs to be informed of their assignments ahead of time. His role and contributions are limited to providing support for the implementation of marketing plans for this project.
- **Lou** - the Yosemite Small Business Program Manager oversees all accounts that fall under the Small Business category; You report directly to Lou. Lou only keeps a high-level overview of this project and its progress. He wants to showcase your project to the entire company if all goes well and expect regular communication, especially when things go wrong.

## Step 2) Write a Project Scope

The project scope consists of the following sections: business objectives and project value, deliverables and milestones, a timeline, resources, costs, and a proposed methodology. Use the above scenario to identify the information relevant to the project scope.

<p><i>In three to four sentences, describe the business objectives for Yosemite and for the customer, The Stefano Shop.</i></p>	<p><i>The business objectives for Yosemite are to successfully integrate The Stefano Shop onto its eCommerce platform. This includes building features such as a storefront on the platform, a social media integration, and a recommendation engine. The objective is to complete the project on 3 month.</i></p> <p><i>For The Stefano Shop, the main goal was to digitize their operations and sales to overcome the struggle to stay afloat and achieve greater success. By joining Yosemite's platform, they aim to increase their online visibility, reach a wider audience, and leverage the platform's features to enhance their store performance. In addition, the Stefano family needs the training and knowledge necessary to effectively manage their digital store once it has been developed.</i></p>
<p><i>List project milestones and deliverables.</i></p>	<p><i>1. Project Kickoff and Requirements Gathering Deliverable: Project kickoff meeting minutes and documented requirements for integrating The Stefano Shop onto Yosemite's platform.</i></p> <p><i>2. create sprint 1 Storefront on Yosemite's Platform Deliverable: design, source code of sprint 1</i></p> <p><i>3. create sprint 2 Social Media Integration Deliverable: design, source code of sprint 2</i></p> <p><i>4. create sprint 3 a recommendation engine Deliverable: design, source code of sprint 3</i></p> <p><i>5. Training and Knowledge Transfer Deliverable: user manual</i></p>
<p><i>What resources as the project manager do you have to complete the project?</i></p>	<p><i>User (Stefano family) Vendor management team Engineering team Marketing Manager Team Business Program Manager team Project documentation and tools</i></p>
<p><i>Do the Cost-Benefit Analysis. Write out the formula, show the steps to get the cost-benefit ratio, and state whether the investment is positive or negative.</i></p>	<p><i>Step 1: Get the present value of the expected or future benefit: Future Benefit / (1 + discount rate)<sup>n</sup> Future Benefit=\$36,000 the present value of future benefit=\$36,000/(1+7%)<sup>1</sup> = \$33,645</i></p> <p><i>Step 2: Get the present value of the project cost. The formula is</i></p>

	<p><i>Future Cost / (1 + discount rate)<sup>n</sup> = \$15,000/(1+7%)<sup>1</sup> = \$14,019</i></p> <p><i>Step 3: Get the cost-benefit ratio. The formula is</i></p> <p><i>Present value of expected benefit / Present value of project cost =</i></p> <p><i>33,645/14,019= 2.4</i></p> <p><i>Above 1 → net positive value; benefit &gt; cost; the project will be profitable.</i></p>
<i>What are the minimum and the maximum number of weeks required to complete the project?</i>	<i>Minimum is 6 weeks and maximum is 10 weeks</i>
<i>What methodology do you propose to use for organizing the project: Waterfall or Agile? Explain your answer.</i>	<i>I propose to use for organizing the project is Agile. Because a used checklist and have 8 point with Agile. Please refer [Project Management Methodology Checklist.docx] in zip file.</i>
<i>What kind of meetings will you have with stakeholders and how often? Explain your answer based on the project methodology you have chosen.</i>	<i>I will have daily meeting, and weekly meeting with stakeholder.</i>

## Step 3) Identify Your Stakeholders and Team

Classify the influence level and amount of authoritative power of each stakeholder as either high or low. Then accordingly, explain how you plan to engage this stakeholder and how they might affect the project in a negative or positive way. Your assumptions should, at a minimum, reference the profiles in *The Cast of Characters* section in Step 1.

### Power-Influence Classification Grid

Stakeholder	Estimated Project Influence ("High" or "Low")	Estimated Project Importance ("High" or "Low")	Assumptions and Risks
Aliyah, Engineering Manager	High	High	<ul style="list-style-type: none"> <li>● Prefers to work in Agile</li> <li>● Her expertise in developing and implementing technical solutions enables her to guide the project's timeline and execution strategy</li> </ul>
Papa Stefano	High	High	<ul style="list-style-type: none"> <li>● has a strong presence in the family business</li> <li>● He manages the floor and is averse to new technology</li> </ul>
Mama Stefano	High	High	<ul style="list-style-type: none"> <li>● she keeps spreadsheets to track inventory and has convinced Papa to work with Yosemite</li> <li>● more concerned about getting the store ready in time for Christmas shoppers</li> </ul>
Junior Stefano	Low	Low	<ul style="list-style-type: none"> <li>● is still learning the family business</li> </ul>
Moe, Vendor Manager	Low	Low	<ul style="list-style-type: none"> <li>● primarily focuses on promoting and</li> </ul>

			<i>coordinating Yosemite's services</i> <ul style="list-style-type: none"> <li>● <i>He works on many projects.</i></li> </ul>
Taylor, the Marketing Manager	<i>Low</i>	<i>Low</i>	<ul style="list-style-type: none"> <li>● <i>tends to take on too many assignments and can delay getting tasks completed</i></li> <li>● <i>often needs to be informed of their assignments ahead of time</i></li> </ul>
Lou, the Program Manager	<i>Low</i>	<i>High</i>	<ul style="list-style-type: none"> <li>● <i>report directly to Lou</i></li> <li>● <i>only keeps a high-level overview of this project and its progress</i></li> </ul>
Me, the Project Manager	<i>High</i>	<i>High</i>	<ul style="list-style-type: none"> <li>● <i>Is able to get executive buy-in; highly influential.</i></li> <li>● <i>Cares about the quality of the customer-facing features.</i></li> </ul>

Create a RACI chart for the project. It will break down the deliverables from the project scope into tasks, but you will have to show who should be responsible, accountable, consulted, and informed for each row.

## RACI Chart

Hint: The Accountable (A) and Responsible (R) stakeholders are the same person for all tasks, except “Engage stakeholders”

Tasks	Stakeholders				
	Me, Project Manager	Lou, Program Manager	Taylor, Marketing Manager	Moe, Vendor Manager	Aliyah, Engineering Manager
Build storefront	I	A	I	I	R
Input Inventory Data	I	I	I	A	R
Build social media integration	C	A	I	I	R
Train Stefano's on platform	I	I	I	I	R
Create social media channels	I	I	R	I	I
Train Stefano's on social media use	I	I	R	I	I
Build recommendation engine	I	A	I	I	R
Create Automated Sales Report	I	I	I	R	I
Engage stakeholders	Engage stakeholders	Engage stakeholders			Engage stakeholders

## Step 4) Create a Project Plan

In this step, you will reference the project scope, stakeholder analysis, and RACI chart to create a project plan for the proposed methodology.

Build a model of your plan for managing the Yosemite project. **It should be a snapshot in the planning phase of the project.** You can use the dates in your current year when creating the project plan.

Display this model in one of the two frameworks, a Gantt chart for Waterfall or a Scrum board for Agile. After you pick one model, be sure to include the information outlined in your project scope, stakeholder analysis, and RACI chart:

- Deliverables
- Tasks
- Assignments
- Schedule and order of tasks

### Additional Instructions for a Waterfall Project Plan

If you choose a Waterfall project plan in Step 2, you should include tasks related to stakeholder engagement, team management, and closure activities. Assume that each additional task can take 1-3 days to complete, so it will affect your schedule. The additional tasks are

- A kickoff meeting,
- Scheduled status reports, and
- Documenting knowledge.

Create a **Gantt chart** for your project by filling in the *Gantt Chart Template* provided in the classroom. Export or save the spreadsheet as a .xls or .xlsx file. Add this spreadsheet to your project submission folder.

### Additional Instructions for an Agile Project Plan

If you choose an Agile project plan in Step 2, you should organize the columns using Scrum phases:

- Sprint Planning
- Backlog
- Work In Progress
- QA
- Release
- Sprint Review



Include relevant tasks that occur in the initial and end phases of a Sprint. Those tasks include:

- Creating a Lessons Learned document
- Adding features to a backlog
- Presenting demos
- Adding tasks to a sprint
- Emailing status reports
- Reviewing Lessons Learned
- Creating documentation for a demo
- Hosting a Retrospective meeting

Create a new **Scrum board** on Trello and make it public.

- To make your board public, click on Private > Change Visibility: Public > “Yes, make board go public”.
- To grab the public URL, go to Show Menu > ...More > Link to This Board.

Paste the URL here:

<https://trello.com/b/UJmn0iFV/from-methodology-to-execution>

## Step 5) Analyze Risk and Select Response Strategy

### Risk Scenario 1

The Stefano Shop project relies on the customer providing Yosemite with information on all products in its inventory. The Vendor Manager has reported that the Stefano's have not delivered that information when requested due to their analog way of handling inventory. They promised to deliver the inventory information in a few more days.

<i>How might this risk affect the project?</i>	<i>it may cause delay for sprint 1</i>
<i>Which of these Risk Response Strategies would you have chosen if you had anticipated the risk prior to initiating the project: Avoid, Mitigate, Transfer, Actively Accept, Passively Accept, Escalate. Explain how you would apply the strategy.</i>	<i>I will choose Accept, because we need have solution to resolve this risk</i>

### Risk Scenario 2

When the Engineering team began designing the recommendation engine—a feature that takes up 20% of the current budget—they informed you that the task was more complicated than anticipated. The Engineering Manager said it would take a total of four weeks and cost an additional \$3,500 to upgrade the AI service that powers the recommendation engine. That fee would have to be covered by the customer. Or the recommendation engine feature could be dropped from the project.

<i>How might this risk affect the project?</i>	<i>This risk is affecting the functionality of the project</i>
<i>Which of these Risk Response Strategies would you apply to the above risk: Avoid, Mitigate, Transfer, Actively Accept, Passively Accept, Escalate. Explain how you would apply the strategy.</i>	<i>I will add 1 more programmer so I can keep the deadline for Christmas</i>

## Step 6) Plan Knowledge Share and Report Project Status

### Knowledge Documentation

Throughout the project and before its closure, you asked the team to create documentation for the company Yosemite and the customers, the Stefano's. In your project plan, what documentation tasks did you include? List below what documentation tasks you came up with, who you assigned them to, how you scheduled them, and why it is important to document this task. Add more rows to the table if you see fit. Add these tasks to your project plan if you haven't already done so.

Task	Assignee	Deadline/Place in Timeline	Reason for Documenting This Task
<i>Project Process documentation</i>	<i>Project manager</i>	<i>Before sprint 1 start</i>	<i>shows information about how a project was organized and kept within scope.</i>
<i>Product Development documentation</i>	<i>Lou, Program Manager</i>	<i>Before sprint 1 start</i>	shows what the product is and the thinking that went into developing it.
<i>User manual</i>	<i>Moe, Vendor Manager</i>	<i>Before app release</i>	accessed by an internal end user who works inside your organization and needs to know how to use the tool being created in your project.
<i>External User documentation</i>	<i>Moe, Vendor Manager</i>	<i>Before app release</i>	documentation is accessed by end users outside the organization who will be purchasing and using the product or process that's created in your project.
<i>Technical documentation</i>	<i>Aliyah, Engineering Manager</i>	<i>At last Sprint Retrospective</i>	contains code or detailed information on the technical resources that went into deploying a release, likely for a software product.

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<i>System/Infrastructure documentation</i>	<i>Aliyah, Engineering Manager</i>	<i>At last Sprint Retrospective</i>	documentation shows how the product or process is supported by your organization's technological system or infrastructure and vice-versa.
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## Status Report

In the Monitor and Control phase of project management, it is your responsibility to track how well the project is going and report to stakeholders the project status.

<i>Where in your project timeline did you schedule or add the task for creating and sending a status report?</i>	<i>In daily meeting</i>
<i>How do you plan to communicate the report to stakeholders, and how often?</i>	<i>I will setup a weekly meeting with stakeholder online and 1 time a week</i>

Create two **status reports** using the *Status Report Template* provided in the classroom based on the risks described in Step 5.

1. The first status report should be created on the day you discovered the Stefano's did not deliver the inventory information to the Vendor Manager on time.
2. The second status report should be created in the middle of the Engineering team building the recommendation engine. That is when you were informed by the Engineering Manager that the project would be more time-consuming and costly.

# Project Status Report #1

PROJECT TITLE: From Methodology to  
Execution

COMPANY NAME: FPT

DATE: 2023/10/6

PROJECT MANAGER: HUNH DUY KHANG

## PROJECT SUMMARY

- Completed sprint 1
- Preparing to start sprint 2

## PROJECT HIGHLIGHTS/BLOCKERS

### Highlights:

- The Stefano's did not deliver the inventory information to the Vendor Manager on time.

### Blockers:

- The recommendation engine—a feature that takes up 20% of the current budget—the task was more complicated than anticipated

## PROJECT HEALTH CHECK

Scope	Status	Tasks: Completed/Pending
Time	At Risk	<b>Completed:</b> <ul style="list-style-type: none"><li>● Sprint 1</li></ul> <b>Pending:</b> <ul style="list-style-type: none"><li>● Input the inventory information task is pending</li><li>● Sprint 2 has not started yet</li><li>● Sprint 3 has not started yet</li></ul>
Cost	On Track	
Quality	On Track	

# Project Status Report #2

PROJECT TITLE: From Methodology to  
Execution

COMPANY NAME: FPT

DATE: 2023/10/31

PROJECT MANAGER: HUYNH DUY KHANG

## PROJECT SUMMARY

- Completed sprint 1, sprint 2
- Resolved issue Input the inventory information

## PROJECT HIGHLIGHTS/BLOCKERS

### Highlights:

- Completed sprint 1, sprint 2

### Blockers:

- The recommendation engine was more complicated than anticipated

## PROJECT HEALTH CHECK

Scope	Status	Tasks: Completed/Pending
Time	At Risk	<b>Completed:</b> <ul style="list-style-type: none"><li>● Completed sprint 1, sprint 2</li></ul> <b>Pending:</b> <ul style="list-style-type: none"><li>● Sprint 3 is pending, need to replan</li></ul>
Cost	Over	
Quality	At Risk	