**QSO 640**

**Final Project**

**John Abbott**

**HighLEARN Sales Training Project**

**Hightower Global Solutions**

**Project Management Plan**

**Submitted to:**

**Dr. Randy Butler**

**Feasibility**

Hightower is a complex corporation with a large number of products and services. This number is increasing with their aggressive acquisition strategy. HighLEARN aims to educate its new sales people in each of the products and services they intend to sell using hybrid learning and discourse platforms. Continued analysis of learning effectiveness will be necessary, as well as effective IT management, web portal design, accessibility and so on. This warrants additional personnel in the company to manage the web portal for HighLEARN if it is to be sustainable. This will not affect the budget of the project, but will affect the budget of the company. A budget forecast would be useful in this matter. Content, security and IT management can be traced to the team’s specialists in these areas.

**Goals**

The goal of this project is to increase the capability of sales people within the company to pitch the products. Currently the influx of new products makes it difficult for the sales teams to keep up with the product line, and there could be opportunities missed because of that slowdown. HighLEARN aims to elevate sales representatives so that they are able to understand products well and make higher quality pitches. This will lead to an increase in product sales for the business.

**Project Charter**

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| --- | --- |
| **Project Title** | HighLEARN |
| **Date** | June 1, 2019 |
| **Project Purpose** | Create online education and discourse platform for sales representatives about products |
| **Project Objectives** | 1. Educate sales representatives on company products 2. Increase sales opportunities 3. Improve pitch quality 4. Increase product sales |
| **Project Deliverables** | See Scope Statement |
| **Project Personnel** | * Project Manager * Richard Con, Director of Learning and Development * Steve Quan, IT Specialist * Shannon Valli, IT Security & Systems * Monica Lanucci, Content Specialist * John Brant, Content Specialist   Required Skill Sets: IT, Learning and Development, Sales, Marketing, Budgeting, Web development, Curriculum development, Digital security |
| **Risks** | * Costs will exceed estimates * Team members do not possess all necessary skills to carry out necessary project activities * Website does not meet user requirements * IT Managers are not available until July 15 * Security risks * Marketing department prefers other system |
| **Schedule Summary** | * Start project June 1, 2019 * Rollout HighLEARN on January 1, 2020 |
| **Budget Summary** | * $1.5 million project budget |
| **Measurable Success Criteria** | * Rollout of curriculum via accessible web portal * Measurable increase in product sales |
| **Other Project Limitations** | Avoid obstruction of regular sales work hours |

**Scope Statement**

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| --- | --- |
| **Scope Description** | HighLEARN will be an online learning and discourse platform that aims to educate Hightower sales representatives on the growing list of products and services offered by the company. The learning platform will allow sales representatives to become more educated on the products they intend to pitch to gain new sale opportunities and elevate their pitch quality. They will also have a forum based platform to share thoughts and tips with one another. |
| **Acceptance Criteria** | * A successful deployment of the web portal and learning content * A measurable increase in sales * An increase in sales employee satisfaction and confidence |
| **Deliverables** | * A fully interactive and accessible web portal design * Implementation and documentation of IT support * Documentation security measures * Website architecture * Full curriculum design * Server list and documentation of server management plan |
| **Exclusions** | Acquisition of additional servers  Additional content beyond products |
| **Constraints** | Education should be concise to minimally interfere with sales representative’s regular operations. |
| **Assumptions** | All employees will have appropriate technology to run the content.  Sales employees will have no starting knowledge of the products. |

**Timeline**



**Commentary:** Because the head of IT is not available until Jul 15, much of the IT administration has to be pushed back until then. However, it is possible for the servers to be prepared by the team itself. This informs some of the scheduling decisions. A lot of overlap in the high-level schedule will appear because of certain tasks that can be performed before others. The major component is that the servers must be prepared before much of the system can be developed.

**Key Project Stakeholder Concerns**



This function of the project is key for keeping stakeholders satisfied. Resistance to the project, especially internally, will disrupt the project’s progress and its effectiveness once deployed. Part of the work done on the project is going to be geared toward keeping supporting stakeholders up to date on their concerns, and reducing the resistance from resistant stakeholders. This ensures that those who have a high degree of influence over the project and the project’s success are as supportive as possible.

**Stakeholder Support**



In this project, the more powerful and influential stakeholders such as the enthusiastic CEO and the department leaders who have expressed great support in the project, are high support stakeholders. Comparatively, the sales team for whom the project is designed seem to be dissenting toward the project because there are already tools available to the company without HighLEARN which can accomplish what HighLEARN can accomplish, in their minds, so their support is low. It is the hope of the training team that a presentation on the advantages of HighLEARN can elevate this support.

**Stakeholder Analysis**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Role** | **Interest** | **Power** | **Classification** |
| Baily Carson | CEO | High | High | Positive |
| Shannon Valley | IT Admin | High | High | Positive |
| Ricardo Contin | Content Manager | High | High | Positive |
| Peter McKenzie | Sales Manager | High | Low | Positive |
| Stephanie Nameo | Acquisitions Manager | Low | Medium | Neutral |
| Steven Quan | Systems/IT | High | High | Positive |
| Content Team | Content Creation | High | Medium | Positive |
| IT Team | Systems and Security | Medium | Low | Positive |
| Sales Team | Target Audience | Medium | Low | Negative |

**Commentary:** As noted above, the high level leaders are enthusiastic about the project, however the audience which is the sales team, is not. They are classified as Negative because they believe that Microsoft has an equally viable solution and HighLEARN is a waste of resources. The advantages of HighLEARN will be pitched to them to remedy this dissent.

**Business Requirements**

Hightower is a company that sells a multitude of products and services. The company’s revenue comes from the sale of these products, and the sale of the products relies frequently on the ability of the sales representatives to pitch and sell the product to another party. The success of the company revolves around the success of the sales department, which generates all the company’s revenue. As such, the sales representatives need to be enabled to do their job, which requires access to knowledge of the products. Through HighLEARN, Hightower wants to provide this knowledge in an effect, accessible format that is user friendly and secure for the sales representatives to be self-reliant in using. The return on investment for this project will come from the gain in sales opportunities that a more educated and capable sales department will obtain.

**Subject Matter Experts**

In order to solicit the business requirements, the designers of HighLEARN need to meet with, interview and pilot test HighLEARN with the sales department. The sales department personnel are the key stakeholders who will provide the business requirements. This includes Domestic, International and Marketing. The results obtained from these interviews and tests will inform the interface and format of the curriculum and portal. Content experts will design the content that goes into the videos and tutorials themselves. IT experts will design security and formatting. Education specialists may be consulted to improve content quality and website interface.

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| **Requirement Number** | **Requirement Description** | **Priority (High, Medium, or Low)** |
| BR 1 | Design and implement web portal interface to needs of sales representatives | High |
| BR 2 | Create employee logins | High |
| BR 3 | Prepare servers for development | High |
| BR 4 | Create and upload educational content | High |
| BR 5 | Install firewall and other security measures | High |
| BR 6 | Obtain product sales summaries | Medium |
| BR 7 | Document testing and coding procedures | Medium |
| BR 8 | Elevate sales department support | Medium |

**Requirements**

**Format**

Using a requirement traceability matrix, which connects each requirement with a need from each stakeholder, Hightower can ensure that needs are tracked and met. Each stakeholder and subject matter expert establish a need in the project, for example the education and content team want to establish the needs of the sales department, so they use interviews and collaboration with the leadership of the sales department to inform the design of the portal and the content. The goal of the project is to increase the sales representative’s ability to sell. Using a traceability matrix ensures that the project stays aligned with this goal. The project is intended to serve the sales employees, so it is important for traceability to highlight that so that the design team avoids contesting those employees. It also prevents the designers from expanding on the needs of the sales employees, causing scope creep, beyond what was established from the employees themselves.

**Project Schedule**



**Estimate**

**Refined Estimate**



**Commentary:** It is difficult to determine exactly how much each milestone is going to cost when a project of this complexity has so much overlap. The estimates made are optimistic and assume all goes according to schedule. Yellow spaces are initial schedule estimates. Green spaces are opportunities that may arise to fast track milestones, but are not necessary to stay on schedule. Red spaces represent acceptable extensions on milestone task length. These extensions are not ideal but may be exploited to keep the project on schedule if the need arises. The team managers will likely be working overtime in many cases given how much they each have to manage at any given time. This consideration is loosely factored into the cost estimate.

**Implementation Approach**

The best implementation approach for this project is agile. The agile implementation methodology is a cyclical process that allows working parts to function in tandem rather than in sequence. Not only do the time limitations on this project call for an agile approach, but the agile approach also makes sense for the multiple aspects of this project. The educational content, the website design, the website coding, the security coding, documentation, all these aspects can progress simultaneously while also collaborating to ensure they align with each other. Implementing the waterfall approach would not be possible, at least in conventional approaches, with the time limitation being as tight as it is. Furthermore, since the multiple pieces need to adapt to one another, doing a waterfall approach would not allow for any flexibility in development, as one completed aspect would lock the rest into an exact set of requirements to fit the ones completed.

**Project Schedule**

As noted in the commentary, the schedule is color coded so that yellow is the expected timeline, green represents opportunities to fast track the schedule by starting the milestone early and leveling resources if possible, and red represents acceptable but sub-ideal areas where the milestone activities can be crashed to compensate for schedule disruptions. Resource Leveling is difficult on this project because with so many working parts going into this, the teams will be working full time to complete their objectives. Team members must be monitored to ensure maximal work efficiency and opportunities for leveling are recognized. For example, if one IT member is not needed for the firewall coding, they might be helpful in contributing to the site coding team for a time. Crashing is not recommended for this reason, because of the complexity of the project. Team leaders will have their hands full.

**Keep Leadership Appraised**



**Commentary:** There are many moving parts in this project and it’s important for each team leader to be aligned with the scope and the needs of the other teams, especially the sales department. Keeping the Project Manager updated on progress for every part is vitally important, so each team will be reporting progress as things go on so that the Project Manager can keep any adjustments needed in mind.

**Change Management**

The complexity of the project indicates a likelihood of change in schedule and activities. The important part of this is that changes stay aligned with the scope. The project must serve the needs of the sales department. Changes will be approved on this basis, and they will be managed to mitigate scope creep and schedule conflicts.



**Risk Management**

The approach to risks will be evaluated based on impact, and the impact will be evaluated depending on the hinderance of progress to the schedule and to the effectiveness of the project in its service to the sales team. Risk 6 is evaluated as High Impact because the sales team must have confidence in the project for it to be a success. Budgeting risks are low impact because the return on investment of the project is worth the expenditure for the business. The schedule and scope of the project must take precedence, so risks affecting that will be evaluated as more impactful, and mitigation efforts will be more severe. This process will keep the project aligned with the scope of serving the sales department.



**Issues Management**

Documentation of issues will follow a similar course to risk management. Issues that have impacted the scope of serving the sales department will be addressed firsthand (Red), followed by impacts to scheduling (Yellow), then impacts on funding (Green).



**Project Close**

Once HighLEARN is ready to be rolled out, the final checks will occur. Each team member on the traceability matrix will ensure that their assignments are complete and delivered. The Project Manager will checklist each deliverable and function as defined by the project charter. The HighLEARN systems will undergo final testing before it is finally deployed for full use. Team members will be returned to their original functions within the company, though some may be hired to permanently monitor HighLEARN for changes, improvements and repairs.

**Warranty Period**

The project has a diverse and complex number of deliverables from server development to quality educational content. A warranty period before closure where the teams checklist all their deliverables, documentation and testing will ensure that no steps or milestones are missed. The project manager should also check through these lists, and ensure that the project upon closure still aligns with the scope. If it does not, changes must be implemented to either prune out excess content or complete incomplete deliverables and goals. The HighLEARN website must be functional to elevate the sales department before closure occurs. Three weeks following rollout to monitor the effects and functionality of HighLEARN should be enough to ensure these goals are met.

**Lessons Learned**



**Commentary:** The complexity of the project presented a great challenge to the company, but with that comes multiple lessons to take forward into future projects. Documentation of these lessons is important because of differing experience among team members as well as the possibility of bringing in new employees and managers. New team members on future projects can refer to lessons learned to improve projects as if they had worked on prior projects with the same company.

**Citations**

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