**Section 5.1: Project Planning Template**

**5.1.1 Introduction**

Effective project planning is essential to the successful execution of a large-scale CRM system like the RTC Salesforce deployment. A well-structured project plan ensures that all tasks are scheduled, assigned, and tracked in alignment with goals, deadlines, and dependencies. This section provides a detailed breakdown of the planning approach, key milestones, and roles, culminating in a professional, actionable project planning template.

**5.1.2 Project Planning Objectives**

The main objectives of the RTC CRM implementation plan were:

* To sequence tasks logically and eliminate roadblocks.
* To assign clear ownership for development, testing, and deployment phases.
* To maintain quality and pace using agile milestones.
* To ensure training and feedback loops were built into the timeline.
* To make time for iteration, testing, and stakeholder review after each major milestone.

**5.1.3 Project Phases and Timeline**

The Salesforce RTC project was divided into 12 structured milestones, each dependent on the completion of the previous. Below is a breakdown of the phases, with estimated durations and critical deliverables:

**📋 Milestone-Based Breakdown (Sample Timeline: 12 Weeks)**

| **Phase** | **Description** | **Duration** | **Key Deliverables** |
| --- | --- | --- | --- |
| **1. Developer Org Setup** | Create and configure Salesforce Dev org | 1 week | Sandbox, licenses, initial user roles |
| **2. Object Creation** | Define schema and relationships | 1 week | Custom objects: Trips, Fares, Employees, etc. |
| **3. Tabs Setup** | Add navigation for objects | 1 week | Lightning tabs added to the app |
| **4. Lightning App Creation** | Unified RTC app interface | 1 week | Lightning app with branding and tab layout |
| **5. Field Configuration** | Custom fields, data types | 1 week | Picklists, lookups, formula fields |
| **6. Page Layouts** | Role-based UI configuration | 1 week | Driver, Conductor, Admin layouts |
| **7. Validation Rules** | Enforce input accuracy | 1 week | Required fields, logic-based restrictions |
| **8. Flows** | Automation of key processes | 1 week | Shift assignment, fare approvals |
| **9. Triggers** | Custom Apex logic | 1 week | Schedule conflict resolution, fare roll-up |
| **10. Reports** | Analytics reports setup | 1 week | Trip revenue, employee workload |
| **11. Dashboards** | Visual dashboards by role | 1 week | Admin, HR, Operations dashboards |
| **12. Final Testing & Go-Live** | UAT, documentation, launch | 1 week | Bug fixes, user training, production release |

**5.1.4 Resource Allocation**

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| **Role** | **Responsibility** | **Name/Team** |
| --- | --- | --- |
| Project Manager | Timeline management, communication | Internal PM |
| Salesforce Admin | Configuration, sandbox setup | Lead Admin |
| Developer | Apex code, triggers | Technical Dev |
| QA Tester | Validation rule and automation testing | QA Team |
| Analyst | Reporting and dashboards | BI Specialist |
| Trainer | Onboarding users | Support Staff |

Each milestone had a dedicated owner, with weekly stand-ups and reviews to ensure milestone completion and feedback incorporation.

**5.1.5 Gantt Chart Representation (Suggestion)**

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**5.1.6 Risk Management & Contingency Plan**

| **Risk** | **Mitigation Strategy** |
| --- | --- |
| Delays in Apex trigger testing | Allocate buffer time in sprints |
| Incomplete user data | Perform pre-import cleansing and dry runs |
| Resistance to adoption | Plan early training and feedback sessions |
| Dashboard inaccuracies | Iterative testing with live data sets |

**5.1.7 Conclusion**

The RTC CRM implementation was executed with a structured, milestone-driven project planning approach. Each component—from schema to automation and analytics—was developed with dedicated timelines, roles, and validation points. This template serves not only as a historical reference for the RTC project but can also be reused or scaled for future transport or municipal CRM implementations.