**Plan for Client Portfolio management system**

**Project Overview**

Project Title: R&D Client Portfolio management

Project Leader: Tong Yu

Project Manager: Penelope Huang

Start Date: 1/August/2023

End Date: 3-21/June/2024

**Project Objectives**

Objective 1: Investigate and analyze the original platform to see whether it is possible to fully automate and how to reduce and manage the human-dependent parts of the system.

Key Deliverables: SharePoint Research report

Objective 2: Investigate and analyze other project portfolio management platforms to find a platform that is suitable for the school and simulate a real school management system, and take opinions.

Key Deliverables: Idea Platform Research report

Objective 3: Evaluate whether the existing management system needs to change the platform, or maintain the existing system and further improve it to meet customer needs (adjustments will be based on investment costs, customer opinions, and improved performance).

**Project Scope**

The scope of project is to investigate the current portfolio management system and workflows utilized in R&D projects through engagement with key stakeholders, pinpointing issues, and challenges. Based on this research, to identify an optimal portfolio management system, scout the market for systems fitting the R&D projects, and propose solutions for system migration along with training for the new system.

**Member task allocation:**

Tong Yu mainly responsible for Objective 2,

Penelope Huang mainly responsible for Objective 1

**Detail Plan:**

1. **Needs assessment**

* Conduct detailed needs assessments with mentors and clients to understand specific pain points and requirements.
* Identify the key features and functionality required for an ideal portfolio management system.

1. **System evaluation**

* Evaluate existing semi-automated systems to determine their strengths and weaknesses. (Evaluate the system's current capabilities with regard to email communication, form submission, student assessment, and group distribution.)
* Evaluate whether the current system can be improved to meet fully automated requirements, or whether a new system is required. (Evaluate the system's current capabilities with regard to email communication, form submission, student assessment, and group distribution. (Perform a technical assessment of the current system's architecture, scalability, and integration capabilities.
* Identify any technical limitations that may prevent the system from being fully automated.)
* Evaluate the costs associated with enhancing existing systems and implementing a new project portfolio management system.
* Consider factors such as licensing fees, development costs, training costs, and potential productivity gains.

1. **Research and recommendations**

* Research potential portfolio management systems that are user-friendly, efficient, and aligned with school requirements.
* Provide a comprehensive list of recommendations, highlighting the pros and cons of each option.
* Gather feedback from users (including teachers, tutors, and students) to gain insight into their experiences and challenges with the current system.
* Identify specific user needs, preferences, and pain points that should be addressed in improvements or new systems.