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[Document title]

Team:

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Client name: Ramesh Lal

Mentor name: Stephen Thorpe

date: 12/10/2023

R&D Client Portfolio Management

status report

Executive Summary

This report summarizes the team's progress from week 7 to week 12 of the initial project proposal. This report will discuss the changes we made to the original proposal, along with progress and track member contributions.

Project Description

The purpose of this project was to find a new platform that meets Ramesh Lal's needs for the processes and automation of the AUT school administration to replace the current system. SharePoint used by AUT system currently can only supports some automated functions, such as automatically sending emails to students. Our project will investigate and analyze the original platform and other project portfolio management platforms to simulate a real school management system. Reduce the human-dependent part of the management system, provide solutions, and then recommend platforms that can be adopted.

The entire project delivery time is 12 months. Our team will employ management plans for communication, change, risk, and quality assurance. Our team holds two weekly stand-up meetings and weekly mentor meetings to share feedback. Change and risk management will be accomplished through change request forms and risk registers. These regular updates will help us ensure that the final deliverables meet specifications and expectations.

Project Overview and Scope

Project objective

Understand the environment and operating procedures of AUT's management system and provide platform recommendations as well as automation and environmental solutions from the perspective of stakeholder.

Scope

The objective of this 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.

Approach

1. Conduct a survey of the AUT portfolio management system and SharePoint.
2. Conduct surveys and interviews with stakeholders to understand the detailed workflow and challenges of the AUT portfolio management system.
3. Envision an ideal portfolio management system suitable for R&D projects.
4. Evaluate no fewer than three available portfolio management systems on the market, analyze them, and make recommendations to the client.
5. Conduct a feasibility analysis of the system chosen by the client and provide a solution for system migration.

Major Milestones

1. Complete a project proposal that satisfies the client.
2. Complete interviews with key stakeholders and write a survey report.
3. Present the survey results of the existing portfolio management system to the client.
4. Present the recommended portfolio management system to the client.
5. Provide the client with a satisfactory feasibility analysis and solution.

Deliverables

* Project proposal
* Status report
* A report for existing portfolio management system
* A report for ideal portfolio management system
* A feasibility study report on the recommended portfolio management system
* Project poster

Team Feedback

* In the first sprint, there is a problem of two client names. That’s because when investigating the customer background on AUT website, the names of two people are on the same line and the form is more like lowercase L, which is mistaken for uppercase I, which is a huge mistake. Therefore, the team will improve the project audit.
* English is not our first tongue. Mentor require to added solutions, ensure the quality and readability of the report.
* Scrum method will not be used, and we will change the team management scheme to PMI‘s phases. It consists of the steps of concept, start-up, project planning, monitoring, and project summary.
* In the skill, the group studied and analysed the business logic.
* In the original report1 and report2, only the advantages and disadvantages of the existing management process and ideal system are summarized, which is not enough. The changed report1 and report2 add details such as the environment and influence functions of the school system investigated online and the specific report of the ideal system of report2.

Details of changes or deviations to proposal

**Details of Changes to the Proposal:**

* In the original proposal, we believed that it was only necessary to investigate the workflow of SharePoint. This has been changed to surveying the portfolio management systems used in R&D projects through key stakeholders and understanding the issues and challenges.
* In the originally submitted proposal, we believed our project scope was to design and develop a prototype of the ideal system. In the revised proposal, this has shifted to recommending an existing portfolio management system available in the market and providing a feasibility analysis and solution.

**Analysis of the Reasons for Changes:**

* Lack of sufficient communication with the client, leading to a misunderstanding of the client's requirements.
* Lack of proficiency in English communication, hindering effective presentations and discussions.

**Measures Taken:**

* To address these deviations, we scheduled meetings with the client and mentor to re-discuss our project scope and the methodology to complete the project.
* During the meetings, we recorded the conversations and documented the meeting reports to ensure alignment with the client.
* In our spare time, we are working on improving our communication skills, presentation abilities, and professional competence.

project status summary

Compared to our original proposal, we have completed parts of the following main tasks:

* Investigation of SharePoint.
* Analysis of the ideal portfolio management system and analysis of two portfolio management systems available in the market.

However, due to changes in the project scope, we need to conduct a more comprehensive survey of existing portfolio management systems and identify key stakeholders for interviews.

At the same time, we also need to provide a more thorough introduction and recommendation of the ideal portfolio management system.

Therefore, the tasks that have not been completed include:

* Partial analysis of existing portfolio management systems.
* Partial analysis of the ideal portfolio management system.
* Recommendation of the ideal portfolio management system to the client.
* Feasibility analysis and solutions for the ideal portfolio management system.

Recommendations

1. Allocate resources more reasonably to ensure the team has ample time to handle emergencies.
2. Communicate with clients promptly, not just in face-to-face meetings. For ambiguous issues, it's also possible to consult the client immediately via email.
3. Regular communication with the mentor, as mentors can provide extremely valuable suggestions and assistance in the methods, we use to complete the project.
4. Training in English and presentation skills. Effective communication and presentation can greatly enhance coordination with clients, ensuring that the delivered results meet the client's expectations more closely.

Individual Contributions

Tasks are distributed equally among team members throughout the project. We use colors to distinguish the tasks of team members, and after completion, we check each other to discuss and ensure quality.

In working hours, our team will have at least two online meetings per week, each meeting lasting 2 to 4 hours, A mentor meeting every two weeks, and an one to two months of client meetings. During sprints, there will be multiple meetings a week. In terms of personal time, each team member will spend at least five hours on the project.

Tang Yu is project leader and total working hour is 113 hours. Penelope Huang is Scrum master and total working hour is 109 hours.

Appendix –schedule

AUT management system report – Penelope Huang

management platforms survey report – Tang Yu

Project Proposal

|  |  |  |
| --- | --- | --- |
| Project\Member | Penelope Huang | Tang Yu |
| Summary | X |  |
| Terms of reference | X |  |
| Rational | X |  |
| Project Objective | X |  |
| Project Scope |  | X |
| Methodology |  | X |
| Skills Analysis | X |  |
| Cost Analysis |  | X |
| Quality Assurance |  | X |
| Team roles and behavior | X |  |
| Milestone |  | X |
| Risk and Issues |  |  |
| Success factors |  | X |
| Business Case |  | X |
| Stakeholder register | X |  |
| Stakeholder management strategy |  | X |
| Project charter | X |  |
| Team contract | X |  |
| Communications management |  | X |
| Change management Plan | X |  |
| Scope statement |  | X |
| Work Breakdown Structure |  | X |
| Project Schedule |  | X |
| Quality assurance plan |  | X |

Mid-Project review

|  |  |  |
| --- | --- | --- |
| Project\Member | Penelope Huang | Tang Yu |
| Summary | X |  |
| Description | X |  |
| Project Object | X |  |
| Project Scope |  | X |
| Approach |  | X |
| Milestone |  | X |
| Deliverables | X |  |
| Feedback | X |  |
| Variations |  | X |
| Current Project status |  | X |