

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>Business Objectives for Yosemite:</i> Yosemite's primary business objective is to provide an eCommerce platform that integrates brick-and-mortar stores onto its platform for a fee. By doing so, Yosemite aims to expand its customer base, increase revenue through platform usage fees, and establish itself as a prominent player in the digital commerce industry.</p> <p><i>Business Objectives for The Stefano Shop:</i> For The Stefano Shop, the main business objective is to digitize its operations and sales by integrating onto Yosemite's eCommerce platform. This transformation aims to revitalize the struggling family-run business, attract a broader online customer base, increase sales revenue through a wider market reach, and ensure long-term sustainability in the highly competitive retail landscape.</p>
<p><i>List project milestones and deliverables.</i></p>	<p><i>Project Milestones:</i></p> <ol style="list-style-type: none"> 1. Milestone 1 - Week 6: Completion of Storefront Development <ul style="list-style-type: none"> - Deliverable 1: Storefront feature on Yosemite platform, including design, build, testing, and release. - Deliverable 2: Inputting all inventory data by Vendor Managers. 2. Milestone 2 - Week 8: Social Media Integration and Onboarding <ul style="list-style-type: none"> - Deliverable 3: Social media channels created by the Marketing team and handed over to The Stefano Shop. - Deliverable 4: Vendor Managers onboard and train The Stefano family on using the Yosemite platform. 3. Milestone 3 - Week 10: Recommendation Engine Release and Sales Report Setup <ul style="list-style-type: none"> - Deliverable 5: Recommendation engine feature developed by the Engineering team (design, build, testing, and release). - Deliverable 6: Vendor Managers set up a custom sales report on the recommendation engine's impact on sales. 4. Milestone 4 - Week 12: Final Testing and Go-Live Preparation

	<ul style="list-style-type: none"> - Deliverable 7: Final testing and adjustments for all integrated features. - Deliverable 8: Store goes live on Yosemite platform, fully digitized, and operational for The Stefano Shop. <p>5. Week 13: Project Completion and Post-Launch Support</p> <ul style="list-style-type: none"> - Deliverable 9: Post-launch support and assistance to ensure a smooth transition for The Stefano Shop.
What resources as the project manager do you have to complete the project?	As the project manager, you have access to the following key resources to complete the project: Engineering Team, Vendor Management Team, Marketing Team, a budget of \$15,000, and your expertise in project management and coordination.
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.	<p>To calculate the project cost-revenue ratio, we need to determine the net benefit of the project and then compare it to the project cost. The formula for the cost-revenue ratio is:</p> $\text{Cost-Revenue Ratio} = \text{Net Benefit} / \text{Project Cost}$ <p>Let's break down the information provided to calculate the net benefit and the cost-revenue ratio for this project:</p> <ol style="list-style-type: none"> 1. Current annual revenue of The Stefano Shop: \$120,000 2. Expected revenue increase due to Yosemite integration: 30% of \$120,000 = \$36,000 3. Total expected annual revenue after integration: \$120,000 + \$36,000 = \$156,000 $\text{Net Benefit} = \text{Total expected annual revenue after integration} - \text{Project Cost}$ $\text{Net Benefit} = \$156,000 - \$15,000 = \$141,000$ $\text{Cost-Revenue Ratio} = \text{Net Benefit} / \text{Project Cost}$ $\text{Cost-Revenue Ratio} = \$141,000 / \$15,000 = 9.4$ <p>The cost-revenue ratio for this project is 9.4.</p> <p>A cost-revenue ratio of 9.4 indicates that for every dollar invested in the project, the expected return is \$9.4 in increased revenue. This ratio suggests that the project has the potential to bring in significant benefits</p>

	<p>compared to its cost, making it a potentially favorable investment for The Stefano Shop.</p>
<p>What are the minimum and the maximum number of weeks required to complete the project?</p>	<p>The minimum number of weeks required to complete the project is 6 weeks. This is the duration needed to complete the first milestone, which includes developing the storefront and inputting all inventory data.</p> <p>The maximum number of weeks required to complete the project is 13 weeks. This is the overall project timeline, which includes completing all milestones, integrating the storefront, social media, and recommendation engine features, and going live on Yosemite's platform.</p>
<p>What methodology do you propose to use for organizing the project: Waterfall or Agile? Explain your answer.</p>	<p>For organizing the project of integrating The Stefano Shop onto Yosemite's platform, I propose using the Waterfall methodology.</p> <p>Explanation:</p> <ol style="list-style-type: none"> 1. Phased Approach: Waterfall is a sequential approach that divides the project into distinct phases, ensuring a clear and organized workflow. This aligns well with the project's three main features: storefront development, social media integration, and a recommendation engine. 2. Rigorous Planning: Waterfall requires thorough planning and documentation upfront, allowing us to define all project requirements and deliverables in detail. This helps manage the tight budget and timeline effectively. 3. Limited Changes: With well-defined requirements and a structured approach, Waterfall minimizes the likelihood of frequent changes or scope creep, ensuring a more predictable project timeline. 4. Task Dependencies: In this project, some tasks have dependencies (e.g., Vendor Managers' onboarding before the store goes live). Waterfall's linear nature can help manage these dependencies efficiently. 5. Documentation: Waterfall emphasizes comprehensive documentation, which can be valuable for future reference, knowledge transfer, and training The Stefano family to operate the digital store. 6. Clear Milestones: Waterfall defines clear milestones, ensuring progress can be easily monitored and reported to stakeholders throughout the project.

	<p><i>While Agile offers flexibility and adaptability, the Waterfall methodology's structured approach and rigorous planning may better suit the specific requirements and limited budget of this project. By following a sequential process, we can manage resources more efficiently and ensure timely delivery of each feature within the project's timeline.</i></p>
<p><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></p>	<p><i>In the Waterfall methodology, the project manager will have the following key meetings with stakeholders:</i></p> <ol style="list-style-type: none"><i>1. Project Kickoff Meeting</i><i>2. Requirement Gathering Meeting</i><i>3. Design Review Meeting</i><i>4. Progress Review Meetings</i><i>5. User Acceptance Testing (UAT) Meeting</i><i>6. Final Presentation Meeting</i> <p><i>These meetings are scheduled at significant milestones to review progress and gather feedback in a structured and sequential manner.</i></p>

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	<i>Aliyah's expertise and experience make her a key influencer. Her preference for Agile may require careful communication and alignment with other stakeholders. Engaging her in design decisions and addressing technical challenges is crucial.</i>
Papa Stefano	Low	High	<i>Papa Stefano's aversion to new technology and budget concerns may need clear communication to ensure understanding of project benefits. Providing regular updates and addressing concerns promptly can have a positive impact.</i>
Mama Stefano	High	Low	<i>Mama Stefano's role as a co-founder and certified accountant makes her important in managing back-end tasks. Clear</i>

			<i>communication and keeping her informed about the project's timeline and benefits will help maintain her support.</i>
Junior Stefano	Low	Low	<i>Junior Stefano's limited experience results in low influence but her future role as a successor makes her important for long-term sustainability. Engaging her in project discussions and involving her in social media planning can positively impact her enthusiasm.</i>
Moe, Vendor Manager	Low	Low	<i>Moe's high influence in upselling may pose a risk of exceeding the budget. Clear communication about budget constraints and aligning project objectives with Yosemite's offerings will help manage this influence positively.</i>
Taylor, the Marketing Manager	Low	Low	<i>Taylor's influence may be low, but workload management can impact project timeline. Providing clear instructions and advance notice for tasks can mitigate any potential delays.</i>
Lou, the Program Manager	Low	High	<i>Lou's high influence and importance as the Small Business Program Manager require regular and transparent communication.</i>

			<i>Keeping him informed of project progress, highlighting successes, and addressing challenges proactively can positively impact the project's visibility and support.</i>
Me, the Project Manager	<i>High</i>	<i>Low</i>	<i>I will be able to influence the stake holder to take a decision based on my expertise at their domain.</i>

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	A	A	R	R	R
Input Inventory Data	A	A	A	R	A
Build social media integration	A	A	R	C	C
Train Stefano's on platform	A	A	C	C	R
Create social media channels	A	A	R	C	C
Train Stefano's on social media use	A	A	R	C	C
Build recommendation engine	A	A	R	C	C
Create Automated Sales Report	A	A	C	R	R
Engage stakeholders	R	A	C	C	C

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:

[TODO: Add your link here]

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.

<p><i>How might this risk affect the project?</i></p>	<p>The risk of delayed inventory information may lead to project timeline delays, resource allocation issues, budget impacts, potential customer dissatisfaction, adjustments to marketing plans, and increased overall project risk. To address the risk, prompt communication with The Stefano Shop, understanding reasons for the delay, and collaborative problem-solving are essential for minimizing its impact on the project. Constant monitoring and mitigation strategies should be employed to expedite the delivery of inventory data.</p>
<p><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></p>	<p>If I had anticipated the risk of delayed inventory information prior to initiating the project, I would choose the "Mitigate" strategy. Proactive communication with The Stefano Shop, providing support and guidance, collaborating with the Vendor Manager, scheduling a buffer, and developing contingency plans would be applied to minimize the impact of the risk and ensure timely progress.</p>

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.

<p><i>How might this risk affect the project?</i></p>	<p>The risk of the recommendation engine being more complicated than anticipated can cause schedule delays, budget overrun, and potential scope changes. It may require</p>
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	additional time and cost for development, impacting resource allocation and customer satisfaction. Transparent communication and collaborative problem-solving with stakeholders are crucial to mitigate the risk effectively.
<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>	The Risk Response Strategy to apply is Mitigate . The project manager will proactively work with the Engineering Manager and the team to streamline development, reduce costs, and address complexities to minimize schedule delays and budget overruns related to the recommendation engine.

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 Scope and Objectives</i>	<i>Me, Project Manager</i>	2023-8-8	Clearly define the project's scope, objectives, and deliverables for all stakeholders.
<i>Cost-Benefit Analysis</i>	<i>Me, Project Manager</i>	2023-8-8	Assess the project's financial viability and benefits to justify the investment.

<i>Engineering Requirements and Design</i>	<i>Aliyah, Engineering Manager</i>	2023-10-10	Document technical requirements and design for the storefront, social media, and engine.
<i>Vendor Management Documentation</i>	<i>Moe, Vendor Manager</i>	2023-10-24	Record vendor onboarding, training, and integration processes for future reference.
<i>Marketing Plan</i>	<i>Taylor, Marketing Manager</i>	2023-11-21	Detail the social media channels and marketing strategy for the digital storefront.
<i>Training and User Guide</i>	<i>Mama Stefano (with assistance)</i>	2023-12-19	Provide detailed instructions for Stefano family on using Yosemite's platform effectively.
<i>Automated Sales Report</i>	<i>Vendor Managers</i>	2023-12-12	Document the setup and format of the custom sales report generated by the recommendation engine.

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>The task for creating and sending a status report to stakeholders is scheduled as a recurring activity throughout the Monitor and Control phase of the project. The frequency of status reports is determined based on the project's duration, complexity, and stakeholder needs, typically sent weekly or bi-weekly to provide regular updates on the project's progress and risks.</i>
<i>How do you plan to communicate the report to stakeholders, and how often?</i>	<i>The status reports will be communicated to stakeholders via email or a dedicated project management tool. The frequency of communication will be bi-weekly, providing regular updates to stakeholders about the project's progress, achievements, issues, and any risk mitigation strategies. This approach ensures consistent and timely information flow to keep stakeholders informed and engaged throughout the project's duration.</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 : _____

COMPANY NAME: _____

PROJECT MANAGER: _____

DATE: _____

PROJECT SUMMARY

The project involves integrating The Stefano Shop onto the Yosemite platform, digitizing operations and sales. Key features include a storefront, social media integration, and a recommendation engine, aiming to complete before Christmas.

PROJECT HIGHLIGHTS/BLOCKERS

Highlights:

- Storefront design and social media channels set up completed.
- Training of Stefano family on platform usage underway.

Blockers:

- Inventory information not delivered to Vendor Manager on time, impacting tasks' progression.

PROJECT HEALTH CHECK

Scope	Status	Tasks: Completed/Pending
Time	At Risk	Completed: <ul style="list-style-type: none">• Storefront design• Social media channels setup Pending: <ul style="list-style-type: none">• Inventory information input• Training of Stefano family
Cost	At Risk	
Quality	On Track	

Project Status Report #2

PROJECT TITLE: _____

COMPANY NAME: _____

PROJECT MANAGER: _____

DATE: _____

PROJECT SUMMARY

The project aims to integrate The Stefano Shop onto the Yosemite platform, encompassing a storefront, social media integration, and a recommendation engine. The timeline targets completion before Christmas.

PROJECT HIGHLIGHTS/BLOCKERS

Highlights:

- Storefront and social media channels successfully developed and integrated.
- Stefano family training progressing as planned.

Blockers:

- Engineering Manager notified that the recommendation engine's complexity requires additional time and cost.

PROJECT HEALTH CHECK

Scope	Status	Tasks: Completed/Pending
Time	Behind	Completed: <ul style="list-style-type: none">• Storefront design• Social media channels setup• Vendor onboarding. Pending: <ul style="list-style-type: none">• Recommendation engine development• Stefano family training
Cost	Over	
Quality	At Risk	