**Project Lessons Learned Report**

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| **Project Name:** | Smaple7 Project |
| **Prepared By:** | S Floyd |
| **Date** | 4/19/2018 |

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| **Project Close-Out Discussions** | | | | |
| Lessons learned meeting held on 4/18/2018 and here is the initial summary. | | | | |
| **Project Team:** | | | Brian Nuebling  D Howard  F Beck  G Mordecai  M Kar  H Lee  L Tillman  Y Koh  D Saringer  J McKay  K Franklin  P Garton  S Floyd | |
| **Project Background:** | | | This project was a phased approach to implement and utilize Salesforce. The first phase migrated Admission's PeopleSoft CRM data to Salesforce utilizing TargetX and Salesforce Marketing Cloud. The second phase included developing marketing campaigns, reports, enhancements, retiring PeopleSoft CRM and integrating appointment scheduler for Advising and Admissions. | |
| **I. Project’s biggest successes:** | | | | |
| ***Description*** | | | ***Factors that promoted this success*** | |
| 1. | Executed Phase 2 using the Agile Scrum Methodology. | | Team cohesion and willingness to meet goals by learning a new methodology. | |
| 2. | Received an excellent report from Sierra-Cedar architecture review and implemented a number of their recommendations without additional consultant hours. | | Excellent technical architecture planning before implementation. | |
| 3. | Deployed Appointment Manager and added 11 colleges to the system with approximately 29,000 appointment and walk-ins. | | The team spend many hours searching for the best product that would meet the needs of all the colleges and admissions counselors. | |
| 4. | Deployed several new marketing campaigns including the graduate campaign that was completed with a constrained time schedule. | | Several team members became knowledgeable of the marketing system so that implementations could go faster despite issues with the consultants. | |
| 5. | Deployed Test candidate data (TOEFL, SAT, ACT, GRE, AP). | | The team worked closely with the EIS team to implement this change. | |
| 6. | Implemented an archiving and restoration system (Spanning) for Salesforce with ability to keep field history. | | The team spend many hours searching for the best product that would meet the needs of the technical team. | |
| 7. | Enhanced Salesforce with new fields (orientation, account checkbox, do not contact, high caliber, most recent school, prospect term flags), visual force pages, reports, student stages, CAS Split, aging process, enrollment data, Eventbrite sync, and a new robust Crosswalk. | | The team obtained clear business user requirements and held business and technical reviews before implementing. | |
| 8. | Used Demand Tools to reduce bad data, duplication, and to improve National Merit process. | | The team members leveraged their knowledge of the system to improve existing processes. | |
| 9. | Removed remaining items off PS CRM (RMDS, Data and address validation, campaigns, etc.). | | The team spent many hours finding solutions on Salesforce to replace what was on PeopleSoft CRM. | |
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| **II. Areas of potential improvement along with high-impact improvement strategies:** | | | | |
|  | ***Category*** | ***Project Shortcomings*** | | ***Lessons learned*** |
| 1 | Resources | The project experienced resource constraints throughout the project. | | Adjust Sprint length or items to accommodate not having full project resources. |
| 2. | Training | Many people were not aware of how Agile worked, so it is important to keep consistency with what they are used to seeing such as a detailed project schedule. | | Maintain a detailed project schedule even when using the Agile methodology. |
| 3. | Resources | Since the team was under pressure with many competing projects, face-to-face meetings would have helped bring everything back into perspective | | Incorporate more face-to-face meetings to build trust and teamwork. |
| 4. | Schedule | This was a long project and some items were needed for upcoming events. | | Know business milestones in advance to schedule tasks accordingly. |
| 5. | Technical | Storage is costly with Salesforce. | | Consider storage needs, access levels, and profile users with every major tasks. |
| 6. | Technical | Updates to fields were not automatically updated with name changes, so the fields did not work as desired. | | Revisit existing formula fields such as prospect scoring to ensure updates did not affect the existing formula. |
| 7. | Scope | Business owners are not clear about the requirements so it is important to go over these in detail. | | For sign-off to go smoothly, walkthrough requirements on skype call and make changes while on the call to ensure everyone agrees, then send off for signature. |
| 8. | Scope | Several changes in departments happened during the project. | | Talk at higher levels and get approvals when adding new fields. |
| 9. | Resources | Several changes in departments happened during the project. | | Make sure you know/identify the stakeholders before testing begins. |
| 10. | Training | New fields were added without consulting the Registrar, | | Understand that the Registrar is the owner of student data, but not prospect data. |