Project Management Review Summary – Grainger PLC

Project	Rent Smart Wales		
Period	15th – 22nd Nov 2023		
Status Overview	Build Started		
Progress in the last week	**Item**	**Completed**	**Responsible**
	Review of Production Deployment dates	21st Nov	Grainger / Open Box
	Confirmation of emails that need to be updated for Opportunities	21st Nov	Grainger

	Item	**Due**	**Responsible**	**Status**
Upcoming deliverables / feedback required	Provide updated wording for emails (& any other documents) that need to be updated for Opportunities	3rd Nov	Grainger	Delayed. Putting UAT dates at risk.
	Provide Occupation Contract Template	3rd Nov	Grainger	Delayed. Putting UAT dates at risk.
	Confirm list of Special Clauses for Occupation Contracts	3rd Nov	Grainger	Delayed. Putting UAT dates at risk.
	Demo	28th Nov	Grainger / Open Box	Will use the RSW Refinement meeting slot. Grainger to confirm who needs to be included.
	UAT	29th Nov	Grainger	At risk.
	Prod Deployment	15 Jan	Open Box	Date pushed out as the Qube upgrade takes place in Dec. Do not want changes in the Salesforce environment before the upgrade.
Discussions/Risks /Issues	• Open Box are mitigating the risk of delayed document & email templates by:			

	o Assisting Grainger in identifying all required emails by inspecting existing Salesforce configuration and listing all workflows, process builders and flows where emails are sent. o Proceeding with development of the RSW workflows using dummy email templates which will be replaced once final versions are available.
Personnel Notes	• Jacob on leave from 15th December. • Open Box will be taking extended leave over December.

Initial Backlog

#	Priority	User Story
1	Must Have	As a TPT User, I want to generate an Occupation Contract from an Opportunity for a Welsh property, So that the document can be sent out to be signed
2	Must Have	As a TPT User, I want to send an occupation Contract to all Contract Holders, So that they can sign the document online.
3	Must Have	As a Lettings User, I want the Agreement Type to be occupation Contract for all opportunities in Wales, So that an incorrect document cannot be sent
4	Must Have	As a Grainger User, I want any communication sent to an opportunity for a Welsh property to have the correct Welsh terminology, So we adhere to Rent Smart Wales legislation
5	Must Have	As a Grainger User, I want any communication sent to an account that is currently living in a Welsh property to have the correct Welsh terminology, So we adhere to Rent Smart Wales legislation
9	Must Have	As a Grainger User, I want any communications sent to a lead that is for a Welsh property to have the correct Welsh terminology, So we adhere to Rent Smart Wales legislation

Historical Reports

Project	Rent Smart Wales		
Period	8th – 15th Nov 2023		
Status Overview	Build Started		
Progress in the last week	Item	Completed	Responsible	
	Meeting to confirm additional requirements for Tenant Portal. New stories added to backlog.	8th Nov	Open Box

	Item	Due	Responsible	Status
Upcoming deliverables / feedback required	Confirmation of emails (& any other documents) that need to be updated for Opportunities	3rd Nov	Grainger	Delayed
	Provide Occupation Contract Template	3rd Nov	Grainger	Delayed
	UAT	29th Nov	Grainger	On Track
	Prod Deployment	6th Dec	Open Box	Go Live support will be initiated from this date

Discussions/Risks /Issues	- Timeline remains unchanged with PROD deployment planned for early December before Jacob goes on leave. - Open Box are mitigating the risk of delayed email templates by: - Assisting Grainger in identifying all required emails by inspecting existing Salesforce configuration and listing all workflows, process builders and flows where emails are sent. - Proceeding with development of the RSW workflows using dummy email templates which will be replaced once final versions are available.
Personnel Notes	- Jocob on leave in December. - Open Box will be taking extended leave over December.

openbox

Project	Rent Smart Wales			
Period	2nd – 8th Nov 2023			
Status Overview	Build Started			
Progress in the last week	Item		Completed	Responsible
	Confirmation of building availability – coming online in Jan 2024		7th Nov	Grainger
	Salesforce build started		8th Nov	Open Box
Upcoming deliverables / feedback required	Item	Due	Responsible	Status
	Confirmation of emails (& any other documents) that need to be updated for Opportunities	3rd Nov	Grainger	Delayed
	Provide Occupation Contract Template	3rd Nov	Grainger	Delayed
	UAT	29th Nov	Grainger	On Track
	Prod Deployment	6th Dec	Open Box	Go Live support will be initiated from this date
Discussions/Risks /Issues	• PC for building has been delayed, but project timeline remains unchanged with PROD deployment planned for early December before Jacob goes on leave.			
Personnel Notes	• Open Box will be taking extended leave over December.			

Project	Rent Smart Wales		
Period	26th Oct – 2nd Nov 2023		
Status Overview	Project Approved		
	Item	Completed	Responsible

openbox

Progress in the last week	Kick-off call		3rd Nov	Grainger / Open Box
	Sprint ceremonies to be scheduled		2nd Nov	Open Box
Upcoming deliverables / feedback required	Item	Due	Responsible	Status
	Confirmation of building availability	ASAP	Grainger	The 5-week project duration needs to be considered when planning for the lease commercials
	Confirmation of emails (& any other documents) that need to be updated	3rd Nov	Grainger	On Track
	Provide Occupation Contract Template	3rd Nov	Grainger	On Track
Discussions/Risks /Issues	• Risk: o Timing of when the building will become available. If it is available at the earliest communicated date, then there is a risk this project will not be completed in time. Open Box is assessing options to close out this project in the shortest timeframe possible.			
Personnel Notes	• None			

Project	Rent Smart Wales			
Period	26th Oct			
Status Overview	Project Approved			
Progress in the last week	Item		Completed	Responsible
	SOW Signed		26th Oct	Grainger / Open Box
	Jira project setup		26th Oct	Grainger
Upcoming deliverables / feedback required	Item	Due	Responsible	Status
	Kick-off call	3rd Nov	Grainger / Open Box	Open Box to schedule

Discussions/Risks /Issues	• None
Personnel Notes	• None