Project Charter

GRAINGER
END OF TENANCY

Contents

1.1   PROJECT TITLE AND DESCRIPTION

Project Title: End of Tenancy

Description: Develop a standardized workflow solution to provide efficiencies and visibility to effectively manage the End of Tenancy process.

1.2   PROJECT STAKEHOLDERS

Name	Title	Project Role	Email	Organization
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1.3 BUSINESS CASE

Grainger is planning on significant expansion, looking to double their number of letting homes in the next 3-4 years.

The current systems and processes used in the End of Tenancy management are not scalable to support the planned expansion.

Leveraging the existing Salesforce platform and user licenses will help to:

- Improve speed & efficiency.

- Reduce errors.

- Allow the business to scale operations without necessitating a linear increase in employee headcount.

- Minimize the time that units remain vacant.

- Improve customer satisfaction. Reduce the risk of not cancelling direct debits or returning deposits on time & create a single view of customer.

1.4 GOALS & OBJECTIVES

- Measure targets, timeframes & KPIs

- Visibility into progress, delays & forecasted completion

- Visibility into team workload

- Clear responsibility

- Standardise process while allowing for flexibility

- Automate notifications to internal teams

- Move towards single view of customer & property

1.5 SCOPE

Embed the End of Tenancy process within Salesforce with no integration to external systems. The backlog below has been created during multiple requirements gathering sessions and represents the anticipated functionality to be delivered for release 1. Delivery will follow an agile methodology where new requirements may be uncovered during the project, in which case scope can be adjusted accordingly with Grainger's approval.

Backlog	Issue key	Story Points
Calculate void duration	FVVP-197	
See Tasks for a Void	FVVP-190	8
View / Update Task Details	FVVP-189	3
Replace Internal Notification Emails	FVVP-132	2
Reporting - See Teams with High Number of Tasks	FVVP-127	1
Dashboard - See Active Voids Behind Schedule	FVVP-125	2
Property Calendar - See Onsite Void Tasks	FVVP-117	1
Detailed Tasks - Close Down Tenancy	FVVP-116	2
Detailed Tasks - Deposit Release	FVVP-115	2
Detailed Tasks - Finalize Check Out	FVVP-114	2
Detailed Tasks - Review Check Out	FVVP-113	2
Detailed Tasks - Check Property Condition	FVVP-112	2
Detailed Tasks - Check Out	FVVP-111	2
Detailed Tasks - Book Works	FVVP-110	2
Detailed Tasks - Cancel Direct Debit	FVVP-109	2
Detailed Tasks - Check Compliance	FVVP-108	2
Detailed Tasks - Notify Stakeholders	FVVP-107	2
Detailed Tasks - Validate Required Information is Captured	FVVP-106	2
Detailed Tasks - Confirm Notice	FVVP-105	2
Detailed Tasks - Validate Notice	FVVP-104	2
See Active Voids for a Building	FVVP-101	1
See History of Voids on a Unit	FVVP-100	1
See Void & Task Audit History	FVVP-99	1
Upload Void Documents	FVVP-98	1
See Unit View Arrangements & Key Location	FVVP-97	2
Update Salesforce Unit - Keep Available Date Up-to-Date	FVVP-96	2
Update Salesforce Unit - Keep FV Date Up-to-Date	FVVP-95	2
Update Salesforce Unit - Keep Unit Status Up-to-Date	FVVP-94	5
Update Salesforce Unit - New Void	FVVP-92	5
See Estimated Available Date & Void Completion Date	FVVP-90	5
Create a Void with Refurb / Refresh / Clean Only-Specific Tasks	FVVP-89	5
Update Relet Status - Update Tasks	FVVP-87	5
Create a Void with Relet Tasks	FVVP-86	5
Dashboard - See New Voids Confirmed for Sale	FVVP-85	1

New Void - Default Unit Sale Status from Salesforce	FVVP-84	1
Dashboard - Other KPIs for R1	FVVP-82	10
Dashboard - See Open Tasks	FVVP-80	2
Cancel a Void	FVVP-78	1
Close a Void	FVVP-77	3
See Summary of Void Phases & % Completion	FVVP-76	3
Complete Voids are Read-Only	FVVP-75	
Dashboard - KPI: Vacant Days	FVVP-72	
Complete a Phase	FVVP-71	5
Update Timelines - Tasks Dependent on a Void Date	FVVP-66	8
Update Void Works Type - Update Tasks	FVVP-65	
Update Timelines - Tasks Dependent on Completion of Prior Tasks	FVVP-64	13
Detailed Tasks - PVI	FVVP-63	
Rename "Void" Terminology	FVVP-62	
Set Tasks to Not Applicable [Close]	FVVP-61	1
Capture a Reason for Updating Key Void Information	FVVP-59	3
New End of Tenancy - Capture End of Tenancy Details	FVVP-58	3
See Salesforce Unit & Building Attributes in a Void	FVVP-57	1
New Void - Calculate Estimated PVI Date	FVVP-56	3
Data Migration - Void Queues	FVVP-54	3
New End of Tenancy - Assign Tasks to Responsible Queues	FVVP-53	5
Calculate Estimated Timelines - Tasks Dependent on Completion of Prior Tasks	FVVP-51	13
Calculate Estimated Timelines - Tasks Tied to an EOT Date	FVVP-50	5
New End of Tenancy - Generate Phases & Tasks from a Template	FVVP-49	13
New End of Tenancy - Create an End of Tenancy	FVVP-48	5
Total		**185**

1.6 BUDGET

Below are the estimated invoice milestones:

Month	Amount
October 2023	£35,100
November 2023	£35,100
December 2023	£70,200
January 2024	£3,600
February 2024	£3,600
Total	**£147,600**

1.7 DELIVERY MILESTONES

Milestone	Date	Duration
Sprint 1 UAT	02 October	1 week
Sprint 2 UAT	23 October	1 week
Sprint 3 UAT	13 November	1 week
End-to-End UAT	04 December	2 weeks
Go-Live	January 2024	NA
Production Support	On Go-Live	2 weeks

1.8 RISKS & ISSUES

- Current process is very manual with multiple variations. It will be a big change for all actors to follow a single process in Salesforce.

  Mitigate: Involve all key stakeholders in UAT after each sprint to ensure alignment

- Adoption & change management will be critical.

  Mitigate: Bring in Change Management consultants who are experts in this field.

- Complex process crossing multiple teams.

  Mitigate: Incremental agile deliveries to measure and assess impact after each deployment

1.9 SUCCESS CRITERIA

1. User adoption of single process within Salesforce

2. Reduced turnaround time per void

3. Visibility into number of voids per employee

4. Reduced number of onsite visits per void