Project Name¦ GDPR Anonymisation (Salesforce)

Project Start Date:
10th June 2024

Project Delivered:
23rd September 2024

Lessons learnt

Objective:

Following the delivery of GDPR Anonymisation around our Leads data held in Salesforce, we hosted a working group session on 2nd October 2024, to gather feedback from the project working group, including our third-party partners, Openbox who were key to the project delivery.

The purpose of the feedback sessions are to gain a better understanding of what has worked well on the project and what we can improve on our upcoming incremental projects moving forward. We aim to ensure everyone has the opportunity and platform to share how the project has been for them.

The output of this session is outlined below for visibility and more importantly so we can build on this information for future projects success.

Summary:

The team discussed the progress of ongoing projects, highlighting successful deployments, meeting of deadlines, and clear communication as key strengths.

They also acknowledged the challenges faced, particularly in the User Acceptance Testing (UAT) phase, and the need for better planning, testing time, and adaptation of UAT process for projects with complex backend processes and integrations. The team also discussed the importance of business optimization projects, the need for visibility, and the potential for improvement in certain areas.

grainger plc

Feedback:

Successes/ What worked well

Target deadline was met to cover Audit requirements.

Compliance requirement from our external Auditors so a commitment to delivery on time was key and a primary focus.

Met functionality requirements aligned to timelines.

Strong collaboration with working group.

Internal and external teams working well together which helps in progression of all areas of the project.

Resource availability and flexibility helped to support the delivery and timeline expectations.

Transparency on additional items raised during the project which supported progression.

Improvements

Project Management discussions on the visibility across detailed timeline and progress.

Holidays and availability visibility to support key tasks and deliverable targets.

Reviewing at a Sprint 0 stage, the scale of the project for delivery. Any impact to Statement of Works initially received understanding.

Highlighting at this point would save project extensions later on and improves expectations of the project delivery.

Review the structure and scale of the project to agree methodology for delivery.

Having an understanding of whether there is a requirement of dedicated Project Manager and prject structure to delivery of whether it is a more agile, smaller delivery. This will support the progression and resource to deliver against the target delivery timescale.

Consideration of any 'out of the box' solution options or whether there is a need for development.

Not everything will need a specific customisation, which could save time and money against a project.

Challenges

Complexity of the projects changing.

Can cause scope creep and project missing the target delivery date and over budget.

Timing of a project.

Key holidays and summer period can cause resource limitations of availability which can cause a project to slip from the timeline.

Relatively large volumes of data across a number of systems which can cause the data to be masked or not as visible to the team until a later point of the project. Can cause delays and additional work to be required.

The right methodology for the project.

This is not always known until later along in the project (following refinement or Sprint 0 stages). More discussions around this at that point would be build on that understanding.

grainger plc

Feedback:

Skills/ Resource

UAT experience around the UAT process could be beneficial.

More UAT focus and understanding through experience on Grainger side would support this stage further.

Already raised on the current gap here.

Data - Analysis and input of data knowledge during the project can cause work to take a little longer than expected. Bringing data into conversations at an earlier point could help support here.

Bringing some skillset/ resource into the project at an earlier point to ensure they understand the objective of the prohect and how this is being delivered to ensure more value is added.

User Acceptance Testing (UAT)

Visbility of UAT findings and outputs to support successful completion.

Improvement of the visibility of Technical testing and sign off which will support UAT testers to continue to test accurately.

Identification of possible scenarios to support UAT to ensure accuracy of UAT focus and ensuring all areas are sufficiently covered and include what is required to give confidence of a successful UAT delivery.

Key Take aways

➢ Sam Duncan to add excluding anonymised records from search results to Jacob Smycz's backlog as part of Consultancy Agreement

➢ Yvonne Dargavel to follow up with Daniel Asamoah for additional feedback to include.

➢ Yvonne Dargavel and Shaun Barrett to align on understanding on other projects and commitments at the start of future projects.

➢ Yvonne Dargavel to understand the level of Data team involvement to ensure inclusion of projects around data input and visibility.

➢ Project team to implement a more structured project approach for future projects, including understanding requirement of Project Manager, Sprint 0 and process