MARCH 7, 2017

Zetes CRM Automation & Optimization- A Scenario Analysis

PROJECT INITIATION DOCUMENT & PROJECT PLAN

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PROJECT INITIATION DOCUMENT

FONTYS UNIVERSITY OF APPLIED SCIENCES

HBO-ICT: English Stream

Data student:	
Family name , initials:	**Hussain M.T.A.H.**
Student number:	**2222716**
project period: (from – till)	**February 13th 2017- 23rd June 2017**
Data company:	
Name company/institution:	**Zetes Netherlands**
Department:	**Marketing**
Address:	**Science Park Eindhoven 5202, 5692 EG Son**
Company Mentor:	
Family name, initials:	**Eijkelhof, S.E.**
Position:	**Marketing Manager**
University Tutor:	
Family name , initials:	**Kuprys, A.K.**
Project plan:	
Title:	**Zetes CRM Automation & Optimization- A Scenario Analysis**
Version:	**v1.0**
Date:	**7th March 2017**

Approved and signed by the company mentor:

Date:
Signature:

Approved and signed by the university tutor:

Date:
Signature:

Agreed and signed by the student:

Date:
Signature:

DOCUMENT APPROVAL

Project Sponsor & Company Tutor- Saskia Eijkelhof	**Project Officer- Tariq Hussain**
Date **Signature**	**Date** **Signature**

DOCUMENT CONTROL

Document Title	Project Plan & Project Initiation Document
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Distribution	Tariq_Project_Initiation_Document_v1.0.pdf

DOCUMENT MODIFICATION HISTORY

Version Number	Primary Author	Description of Version	Date Completed
0.1	Tariq Hussain	Draft version	22nd February 2017
0.2	Tariq Hussain	Draft version after feedback from Fontys tutor.	1st March 2017
0.3	Tariq Hussain	Draft Version after feedback from Company Mentor.	2nd March 2017
0.4	Tariq Hussain	Draft Version after feedback from Fontys Tutor	7th March 2017
1.0	Tariq Hussain	Release Version	7th March 2017

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1. PROJECT DEFINITION

1.1 PURPOSE OF DOCUMENT

This document serves the Project Sponsor to have a firmer understanding of the project. It details critical aspects such as the business reasons, scope, expected deliverables, project planning and other measures of quality and modes of communication within stakeholders. Further it serves as a word of commitment from the Project Team to the realization of the project by itself.

1.2 BACKGROUND

Zetes Nederland's marketing department has a large database containing customer information. They use the CRM software Salesforce.com for the purposes of managing Leads and Opportunities, however information is attained from various offline sources like business cards, trade-shows, conferences and these need to be put into the system manually. This is a tedium and a method to see if any of the processes can be automated from online sources would indeed prove to be helpful. Another issue in concern is the non-uniformity of the data, where inconsistencies, duplicates, and overall absence of a clear criteria for the Salesforce users to follow while entering data. As Salesforce is manually updated, the data is static i.e. valid only for time of entry. Fields like Position in a particular company of a client need to be manually validated from external online means. There needs to be system that facilitates validation of Salesforce information in real-time, as up to date as possible.

1.3 PROJECT OBJECTIVES AND DESIRED OUTCOMES

Overall Goal

The nature of the project is research and implementation based. The ideal outcome is a self replenishing Salesforce Account with the highest quality of customer contact information. However the overall goal of this project is to optimize the Salesforce experience for Zetes to be more cost and time effective without compromising ease and simplicity and also analyse a scenario where such an outcome is possible. With respect to the following context, the following Project Products are declared below.

Products

- A vendor selection criteria report.
- A business case describing results yielded by eligible tools & methods applied and a recommended solution including its implementation process.
- A Software Design Document laying the foundation for an in-house software build integrated to Salesforce which will meet the particular business requirements.
- A Final Research Report for the purpose of evaluation.
- A user-manual for standard practice- Salesforce Data Entry

1.4 PROJECT SCOPE

PROJECT JUSTIFICATION

The departments of Sales and Marketing in Zetes have little to no time for updating and managing customer information as it strays from their core focus of acquiring new leads and nurturing existing partners. The Salesforce customer contact information is captured and maintained manually by the Marketing and Sales departments whenever appropriate,which implys that the information is static. The manual validation of this information is not only a difficult task but also sometimes unachievable as there is no one source that will satisfy the data parameters in question. Thus, chances are outdated contact information may remain undetected within the current Salesforce. This project will seek a solution to this problem. Furthermore, there also needs to be a certain standard method of customer information entering the system in place so someone new to the company causes minimal data discrepancies and inconsistancies.

SCOPE ANALYSIS

A Salesforce Account owner at Zetes Marketing or Sales, manages their relationships with their customers by declaring information under certain fields namely: Contacts, Activity History, Opportunities, Notes & Attachments. An Account Owner shall have multiple customers and each shall have contact information that is filled in the Contact field, correspondence via email which is stored in Activity History, and various notes and attachments from these emails that also are archived under Notes & Attachments, along with other operational information. This project prioritizes the Contact information above all.

Certain Inclusions

Contacts.

- First name
- Last name
- Level
- Department
- Email
- Phone
- Gender
- Language

Certain Exclusions

Activity History: Previous involvement with clients containing email strings and communication results.

Opportunities: All potential deals are managed here.

Notes & Attachments: All forms of attachment files in the emails with customers are stored in this category.

PROJECT DELIVERABLES

- Project Initiation Document with Project Plan.
- Trello board to approve and track changes, review deliverables and leave comments.
- Weekly Progress Reports which will show Project goals being realised and completed on a day to day basis.
- Salesforce Standard-Practice manual which will act as a guide for anyone who is tasked to enter customer information into Salesforce and also provide a beginners understanding towards interacting with the system.
- Eligible Solutions Assessment Business Case which will have the criteria a solution needs to meet, the list of third party platforms or other methods used that can/cannot achive automation and/or optimization for Zetes Salesforce.
- Software Design Document for an in-house software builds which integrates with Salesforce and meets the business requirements.
- Final Research Report which will be provided to all stakeholders.
- Final Presentation which will be presented as a demonstration of how the project was realised over the course of time, learning points/experiences, and discussion of project success.

PROJECT NON-DELIVERABLES

- Application Software which will integrate with Salesforce for automation and optimization of Zetes Salesforce data.

PROJECT SUCCESS

The project will be determined as successful when Zetes knows what are their possibilities for an automation and optimization of their Salesforce data and experience, and if it would be a good investment for taking up any external solution or build an integration solution.

1.5 PROJECT BUDGET

No clearly laidout budget for the time being.

1.6 CONSTRAINTS

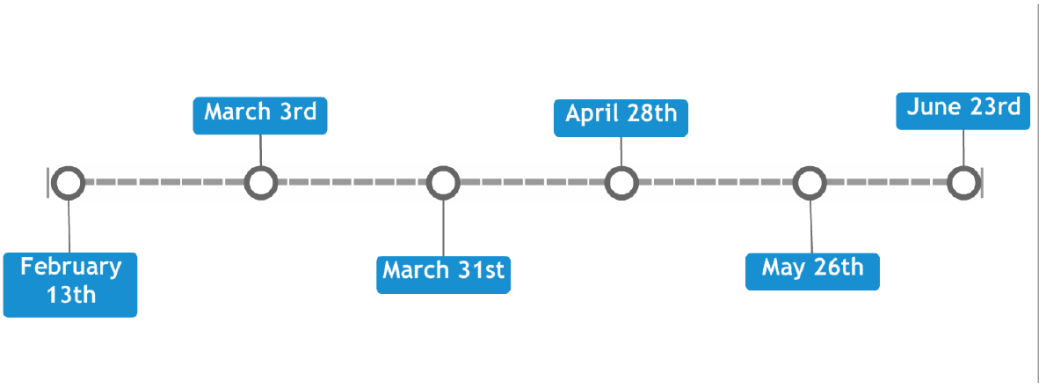
QUALITY

- To ensure the project at a local level is successful and therefore providing quality and reliable feedback and reference for future development, is dependent on full participation and of primary stakeholder and various key-stakeholders.

TIME

- The project is constrained by the timeframe set by Zetes Nederland of ninety-eight days. Below is timeline of key deadlines.
- The project employs the use of multiple off-the shelf solutions from third party vendors which may or maynot run on a fixed trial period.

DELIVERABLES AND KEY-DEADLINES



March 3rd 2017

- Project Initiation Document & Project Plan- Final
- Salesforce Standard Practice Manual v0.1

March 31st 2017

- Vendor Selection criteria v0.1
- Salesforce Standard Practice Manual- Final
- Plan B- Software Design Document v0.1

April 28th 2017

- Implementation Report- Final
- Eligible Solutions Assessment Business case v0.1
- Final Research Report v0.1

June 21st 2017

- Final Research Report- Final
- Final Presentation

RESOURCES & SKILL RESTRICTIONS

- Project could demand Programming Skills in APEX, Java or other developer skills, which the Project Implementor is not educated or experienced in.

1.7 ASSUMPTIONS

- The solution will only implement free to use or free trial software unless agreed upon.

- The solution may be a combination of software-products or just singular product.

1.8 STAKEHOLDERS ANALYSIS

PRIMARY STAKEHOLDERS

The primary stakeholders is the Marketing & Sales departments of Zetes.

SECONDARY STAKEHOLDERS

The secondary stakeholders is Fontys and associations of the team itself.

KEY STAKEHOLDERS

- Project Team
- Sales Team
- Marketing Manager- Saskia Eijkelhof
- University Tutor- Andrius Kuprys
- University Internship co-ordinator- Frank Henning
- Family
- Friends

STAKEHOLDERS MATRIX

Here is a Stakeholders Matrix showing the Key-Stakeholders and their Power vs Interest position. The grid consists of four categories, which are listed below.

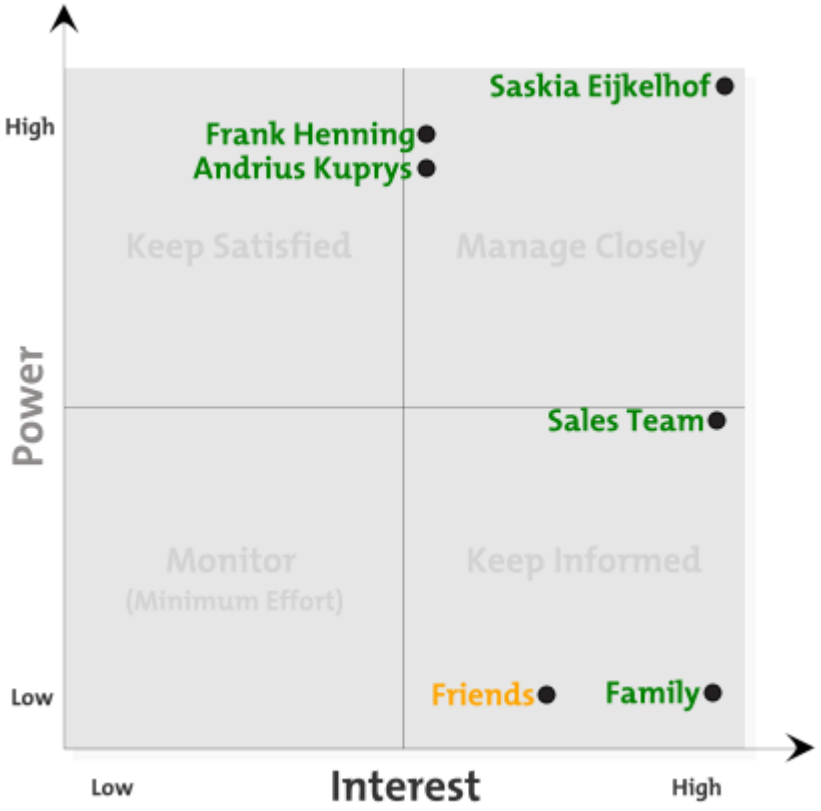
Manage Closely: Stakeholders with High Power and High Interest should be fully engaged with and made the greatest efforts for satisfaction.

Keep Satisfied: Stakeholders need to be engaged sufficiently so as not to loose their interest in the project and also not to bore them with excessive communication.

Keep Informed: Stakeholders that should be kept informed adequately as they can be helpful with detail of the project.

Monitor(Minimum Effort): Monitor their activity, engage when necessary.

As for the color coding, stakeholders in Green signify advocates or supporters and Orange as neutral to the cause of the project.



1.10 PROJECT INTERFACES

- Salesforce.com
- Microsoft Project
- Microsoft Office
- Trello

2. PROJECT APPROCH

2.1 PROJECT METHOD

The project methodology which will be used is Agile, where each project cycle will last twenty working days. Within this time frame project goals will be achieved and deliverables realised. With the time constraint set, the number of iterations possible is five.

2.2 PROJECT GOVERNANCE AND ORGANISATION

Annex 1 shows the overall infrastructure in Zetes Local branch in the Netherlands.

Annex 2 sets out the overall project structure.

Project Board: The Project Board consists of the Project manager and the Project Team, the University Supervisor, the Project Sponsor/Internal Supervisor, and the University Internship Co-ordinator.

Project Sponsor/Interval Supervisor: The first to realize the project concept and also responsible for authorising the provision of resources and facilitate the project.

Project Manager: Responsible for co-ordinating the plan and document the project and also for working closely with Project Board to clear out the scope and scheduling all developments.

Project Team: The Project Team will work according to the plan set by Project Manager. It comprises of:

- Project Officer- Responsible for maintaining the quality of documents.
- Analyst- Responsible for making the Software Design Document.
- Technical Communicator- Responsible for producing technical documents for stakeholder use.
- Deployer/Implementor- Responsible for implementing a solution.
- Project Archivist- Responsible for maintiaing all documentation.

University Supervisor: Responsible for overlooking the progress and providing relative feedback.

University Internship Co-ordinator: Responsible for approving the Initial Project Survey.

KEY-ROLES

Project Sponsor/Internal Supervisor- Saskia Eijkelhof

Project manager & Project Team- Tariq Hussain

University Supervisor- Andrius Kuprys

University Internship Co-ordinator- Frank Henning

2.3 PROJECT CONTROLS

- Regular status reporting to Internal Supervisor. A written report will be produced highlighting progress against the schedule, any project issues or risks.
- A weekly progress report will also uploaded into Trello board for Internal Supervisor and University Tutor to visualize.

2.4 QUALITY MANAGEMENT

Quality management will be undertaken by the Project Officer to ensure that all the project deliverables are of an appropriate standard.

For project documents, a Quality Assurance review shall be facilated by the Project Officer. The document in question shall be made available to all associated parties with a prior notice of two working days and will be asked to make responces over it. These responces shall be minuted and outcomes shall be recorded. The outcomes will be discrete and in three levels, one of the three will be sought, which are as follows:

- No further changes necessary.
- Minor changes required, undertake those changes and circulate the final version, no further meeting required.
- Rejection of the product- major changes required, follow up Quality Assurance required.

A Quality Log will be maintained by the Project Officer which will be in the form of an Excel spreadsheet and contains details of each project product such as:

- Date of creation
- Date of approval
- Date of sign-off

2.5 RISK MANAGEMENT

RISK MANAGEMENT APPROACH

Every project holds certain level of risk as it is its nature and sometimes not all risks can be completely eliminated. However with an effective risk management strategy a majority of them can be anticipated and their impact can be reduced or even completely eliminated. The strategy to be employed shall comprise of analysis, planning, and control measurement which will elaborated in the Appendix 1.

INITIAL RISK ANALYSIS

The following abbreviations are used in the risk measurement:

- L = LOW
- M = Medium
- H = High

Risk ID	Description	Impact(H/M/L)	Probability(H/M/L)	Risk Owner	Control Measurement
1.	Lack of a suitable third party solution	H	M	Project Manager	SDD which lays down the foundation for developing a software in-house.
2.	Under Communication	M	H	Project Team	Adopt a communication strategy of setting up appintments.
3.	Resource Inadequate	H	M	Project Sponsor	Expect a process-oriented result.

2.6 PROJECT FILING

Project files will be managed by the Project Archivist who will maintain two equal sets. One set will be for office storage and the other on personal storage.

All products of this project that are documents will be version controlled as follows:

- The file name will reflect the title of the document.
- The file name will have the document version appended to the title.
- The final release version of the document will be v1.0 and in PDF format.

Example of versioned documents are as follows:

- Tariq_Project_Initiation_Document_v0.2.doc (second draft of the document prior to release)
- Tariq_Project_Initiation_Document_v1.0.pdf(final release version after approval)

3. COMMUNICATION STRATEGY

3.1 COMMUNICATION PLAN OBJECTIVES

1. To state the method and form of communication to be used.
2. To identify the main audiences.
3. To state the forms of communication to be used.

3.2 TARGET -FONTYS PROJECT SUPERVISOR & INTERN

This clause declares that **Company Mentor- Saskia Eijkelhof (Marketing Manager Zetes Nederland)** can communicate with **Fontys University tutor- Andrius Kuprys** and **Fontys University Student/Zetes Nederland Intern- Tariq Hussain** by Channel 1, Channel 2 and also in person whenever necessary, during the course of project.

CHANNEL 1: EMAIL

NAME	EMAIL
Tariq Hussain(Student/Intern)	tariqarif.hussain@student.fontys.nl
Saskia Eijkelhof(Company Mentor)	Saskia.Eijkelhof@nl.zetes.com
Andrius Kuprys(Fontys Tutor)	a.kuprys@fontys.nl

CHANNEL 2: PHONE

NAME	PHONE NUMBER
Tariq Hussain	+31 6 39346400
Andrius Kuprys	+ 31 6 12263144

3.3 MESSAGE FREQUENCY

Message frequency between Intern and School Mentor- Andrius Kuprys has been discussed and decided upon the following:

Project Update via email shall be sent after every iteration of the project. When any other times communication is required, Channel 1: Email and/or Channel 2: Phone may be used.

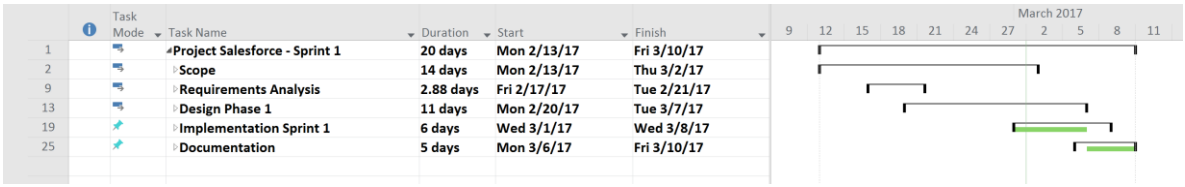
4. PROJECT PLAN

4.1 INITIAL PROJECT PLAN

The initial project plan which will determine which route the project takes, which is shown below. It is equipped with time-frames for tasks along with responsibilities assigned will be maintained using Microsoft Project. Each Iteration will be planned a week prior to its commencing.

HIGH LEVEL PLAN

Below is a screenshot from MS Project showing the high level plan of the first iteration of the project.



	Task Mode	Task Name	Duration	Start	Finish
1		Project Salesforce - Sprint 1	20 days	Mon 2/13/17	Fri 3/10/17
2		Scope	14 days	Mon 2/13/17	Thu 3/2/17
9		Requirements Analysis	2.88 days	Fri 2/17/17	Tue 2/21/17
13		Design Phase 1	11 days	Mon 2/20/17	Tue 3/7/17
19		Implementation Sprint 1	6 days	Wed 3/1/17	Wed 3/8/17
25		Documentation	5 days	Mon 3/6/17	Fri 3/10/17

PHASE DESCRIPTION

Scope: In this phase a clear scope analysis is done of which the result is present in this document, mentioned above.

Requirements Analysis: In this phase, a pre-emptive study is done of what the obvious requirements concerning the project i.e. familiarity with the Salesforce interface, understanding of the company in terms of markets involved, products, etc. before commencing with the project. Further, objectives such as in-depth understand of the problem, finding a conceptual solution (for example, searching on the internet what Salesforce and other third-party platforms integrate and book-marking them), and other forms of Strategic Analysis including building the Project Initiation Document with Project Plan.

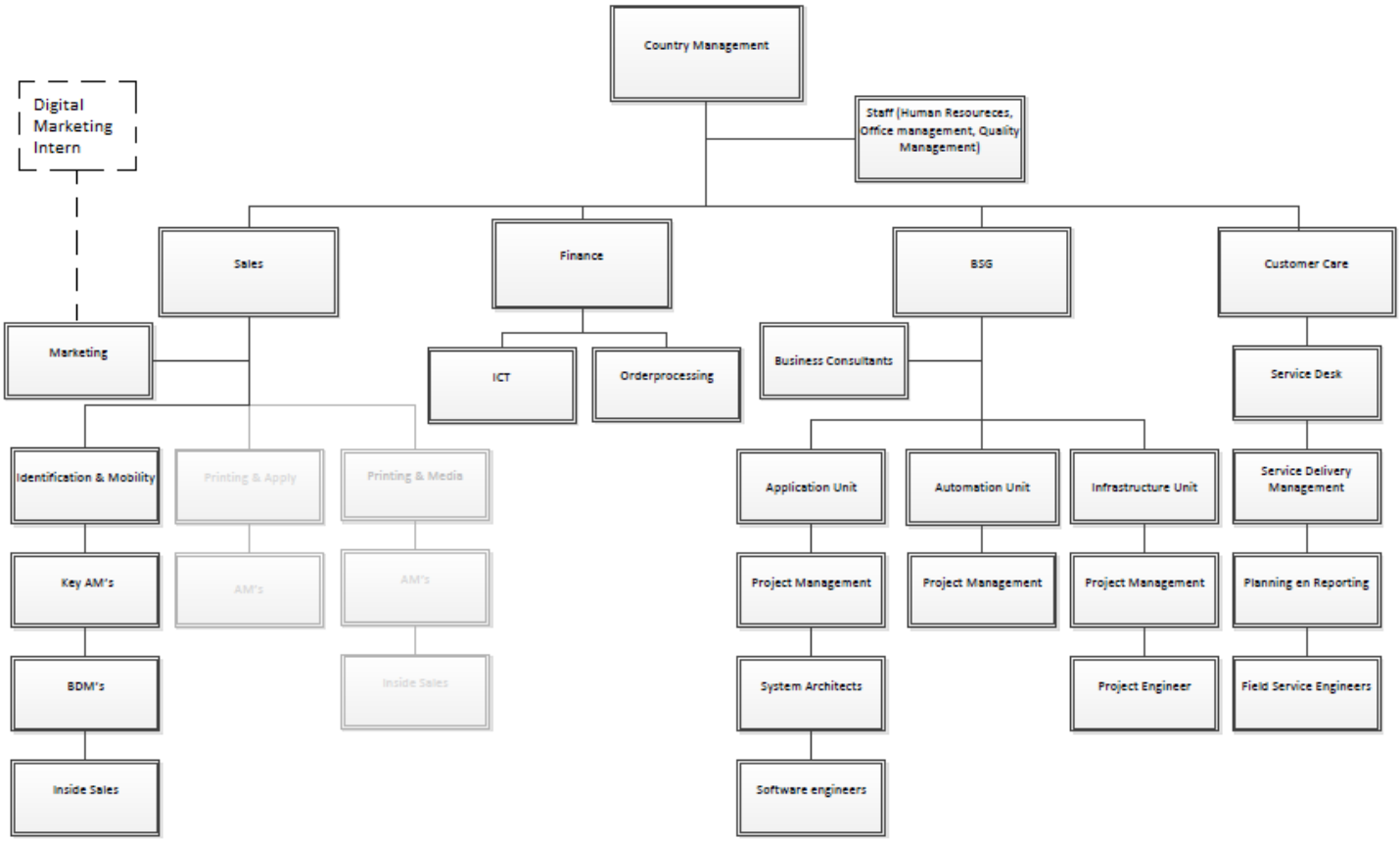
Design Phase 1: In this phase, a criteria and preparation for an implementation is formed. This criteria shows what a software solution "must" do for the purposes of the project. Also information regarding how a software solution will be put to use with Salesforce will be collected, be it in the form of a manual or a website. These results are discussed with Company Supervisor for her approval and a sign to proceed.

Implementation Phase 1: In this phase, the software solutions are implemented using Design Phase 1 information. If any issues or bottlenecks are encountered then they are recorded(noted down). Further, if certain processes can manipulate data within Salesforce they are discussed with Company Supervisor before proceeding.

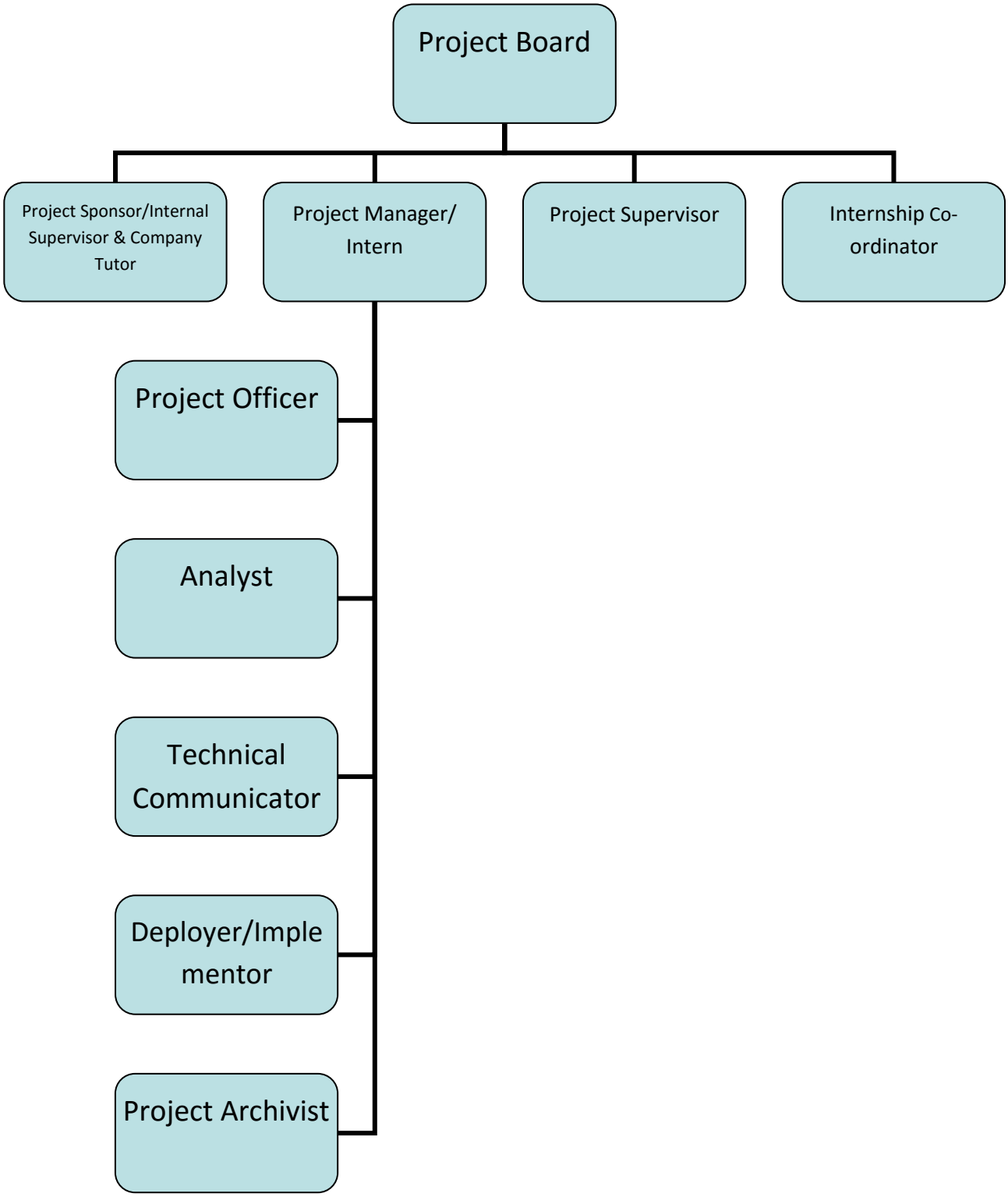
Documentation Phase: In this phase, the implementation is documented in a way that is understandable, clear in language, and elaborate enough (details that are unique to Salesforce of Zetes) that someone new for example an account manager or a sales representative at Zetes can follow.

Annex 3 shows the detailed Initial Project Plan. The tasks shown in red are critical tasks, which if delayed will delay the entire sprint.

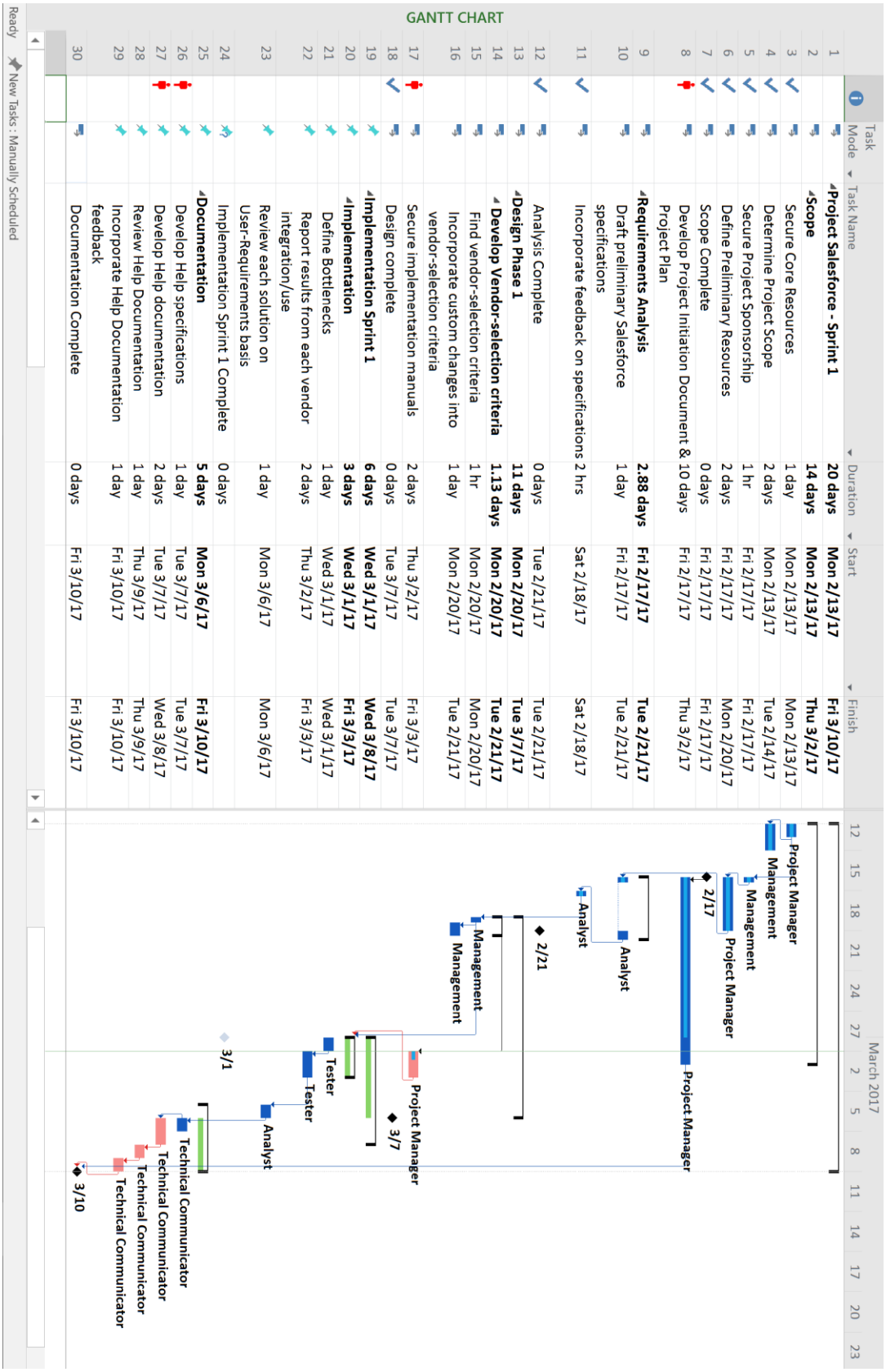
ANNEX 1


Country Management
Staff (Human Resoureces, Office management, Quality Management)
Digital Marketing Intern
Sales
Finance
BSG
Customer Care
Marketing
ICT
Orderprocessing
Business Consultants
Service Desk
Identification & Mobility
Printing & Apply
Printing & Media
Application Unit
Automation Unit
Infrastructure Unit
Service Delivery Management
Key AM's
AM's
AM's
Project Management
Project Management
Project Management
Planning en Reporting
BDM's
Inside Sales
System Architects
Project Engineer
Field Service Engineers
Inside Sales
Software engineers

ANNEX 2


Project Board
Project Sponsor/Internal Supervisor & Company Tutor
Project Manager/ Intern
Project Supervisor
Internship Co-ordinator
Project Officer
Analyst
Technical Communicator
Deployer/Implementor
Project Archivist

ANNEX 3- DETAILED INITIAL PLAN



APPENDIX A- ELIGIBLE SOLUTIONS ASSESSMENT- BUSINESS CASE TEMPLATE

COVER PAGE

This page will provide the following information:

- Name of Business Case
- Name of Author
- Short Description of the document
- Designation of the Author
- Date of Release

OVERVIEW

This section will include the following information:

- The reason for initiating the project.
- The number of solutions discovered.
- The argument that the project is a success.

EXECUTIVE SUMMARY

This section will summarise the rest of the business case in such a way that a reader can get full understanding of the business case.

CURRENT SOLUTION

This section will describe the current solution in use including the hardware and software. It will also include the current cost of the appointed solution including indirect costs(e.g. hours spent on maintaining the system).

NEED FOR CHANGE

This section will explain why a new solution is required and what benefits the new solution will bring, explicitly stating each. Also a description of what type of Project this is, will be found here aswell. For example, this is a Regular upgrades/ Maintainance project with the argument of why such a Project is necessary for the company.

PROCESS TO FIND A NEW SOLUTION

The section will show how the solution was found including details of all the research done which may include information from sources like conferences, test environment etc. with a motive to demonstrate the diligence behind the project.

OVERVIEW OF SOLUTIONS CONSIDERED

This section will be the follow up to the previous section where the must have requirements will be verified against all the solutions and if they qualify to be a fit for the problem.

LIST OF POTENTIAL VENDORS

This section will illustrate all the vendors that can perform under the criteria selected and has been tested with, also considerinf factors such as cost and implementation effort, with a motive to provide choice of option.

RECOMMENDED VENDOR

This section will recommend a specific vendor and why that vendor was selected, with due consideration of costs involved and justification for a higher cost than others, if that is the case.

REQUIRED INVESTMENT

This section will list out the costs involved for the recommended solution, including indirect costs(e.g. man-hours, downtime etc.).

EXPECTED BENEFITS

This section will address all the benefits brought by the solution to address the “Need for Change” and also other benefits which were realised.

RISKS OF PROJECT

This rection will providide a risk management analysis of the recommended solution.

IMPLEMENTATION PLAN

This section will provide an implementation plan showing dates, critical milestones, who will be effected and when.

CONCLUSIONS

Finally, the conclusion will bring the business case to an end, with a specific request such as authorization or funding so as to facilitate the decision making process.

APPENDIX B- RISK MANAGEMENT ANALYSIS

1.INTRODUCTION

In this section we will discuss the possible risks involved with the project and necessary control measures to ensure a safe process in regard to the Administrative Organisation of the company.

First of all, a brief description of Zetes is as follows. Zetes is a multinational company situated over eighteen countries and is head-quartered in Brussels(Belgium), specializing in the provision of identification and mobility solutions for goods and even people. Zetes provides supply chain solutions for organizations in manufacturing, pharmaceutical & healthcare, warehouse & distribution, food and beverage, retail, transport & logistics, automotive, postal & courier industries and even governments, administrative units and public institutions with people authentication tools based on biometric, AFIS (Automated Fingerprint Identification System), smart card technologies

Although Zetes is located in many countries each country branch varies in size and customer base. As of Zetes Netherlands, customers could range from local to international. This makes quite a large customer base considering the number of people employed (approximately eighty five) and a very rich local market. Hence a pre-emptive risk management analysis which will show recognizable risks involved and the corresponding control measures, can provide a safe commencing of the project. The project manager working with the project team and project sponsor will ensure that risks are actively analyzed, and managed throughout the life of the project. However care shall be taken that risks are identified as early as possible so as to reduce its impact. Control measures shall be taken once a risk is recognized.

2. RISK ANALYSIS

In this chapter, a number of risks associated with this project shall be identified and their impact on a qualitative scale. Further their counter measure shall be provided in following chapter.

2.1 QUALITATIVE RISK ANALYSIS

A risk will be measured as Risk= Probality x Impact which can be decomposed into Probality(which is the likelihood) & Impact(loss/harm the risk can cause).The following abbreviations are used in the risk measurement:

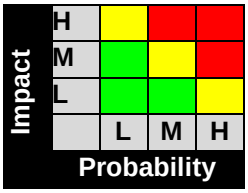
- L= LOW
- M= MEDIUM
- H= HIGH

Probality

- High – Greater than 70% probality of occurance
- Medium – Between 30% and 70% of occurance
- Low- Below 30% of occurance

Impact

- High – Risk that has the potential to greatly impact project schedule and performance.
- Medium – Risk that has the potential to slightly impact project schedule and performance.
- Low – Risk that has relatively little impact on schedule or performance.



Risks that fall within the RED and YELLOW zones will have risk response planning which may include both a risk mitigation and a risk contingency plan.

2.2 RISKS IDENTIFIED & BREAKDOWN CATEGORIES

Risk ID	**Task**- Risk Factor	**Probality x Impact**	**Risk Owner**	**Responce**
1.	**Scheduling**- Unrealistic schedule and budget, wrong time estimation.	M x M	Project Manager	Control Measure 1
2.	**Strategic Analysis-** Unclear goals and objectives, lack of support and commitment from Project Board	L x H	Project Manager	Control Measure 2
3.	**Preliminary Project Plan-** Unclear goals and objectives, lack of support from Project Board	L x H	Project Manager	Control Measure 2
4.	**Standard Software**- The third party software may not deliver the required functionality when on a free trial.	L x H	Project Manager	Control Measure 3
5.	**Scope Analysis-** Unexpected scope expansions	L x H	Project manager	Control measure 4
6.	**Project Manager and Team-** Incompetent Project manager and team without the right skill-set	H x H	Project Team	Control Measure 5

3. CONTROL MEASURES

In this chapter, the control and preventive measures for the risks above are provided in the previous chapter.

Control Measure ID	**Description**
1.	• Modification of schedule and budget • Construct a critical path diagram • Communication with Project Sponsor and other stakeholders
2.	• Establish a communication strategy with all stakeholders • Review Scope Analysis document from high level and not in too much technicality
3.	• Describe the situation to Project Sponsor • Based on Project Sponsor consideration, device a budget
4.	• Provide a Scope Analysis document defining scope of deliverables and non-deliverables • Review Scope Analysis document with Project Sponsor
5	• Training on management skills like facilating meetings, risk management, handling different stakeholders. • Adapt process to available know-how

4. CONCLUSION

The number of identified risks involved in this project here is on pre-emptive basis and other unknown risks need to tracked, monitored and reported throughout the project lifecycle. All project changes encountered during sprints while implementing various software solutions will be analysed for any risk it may pose. This risk analysis will be part of the business case.