



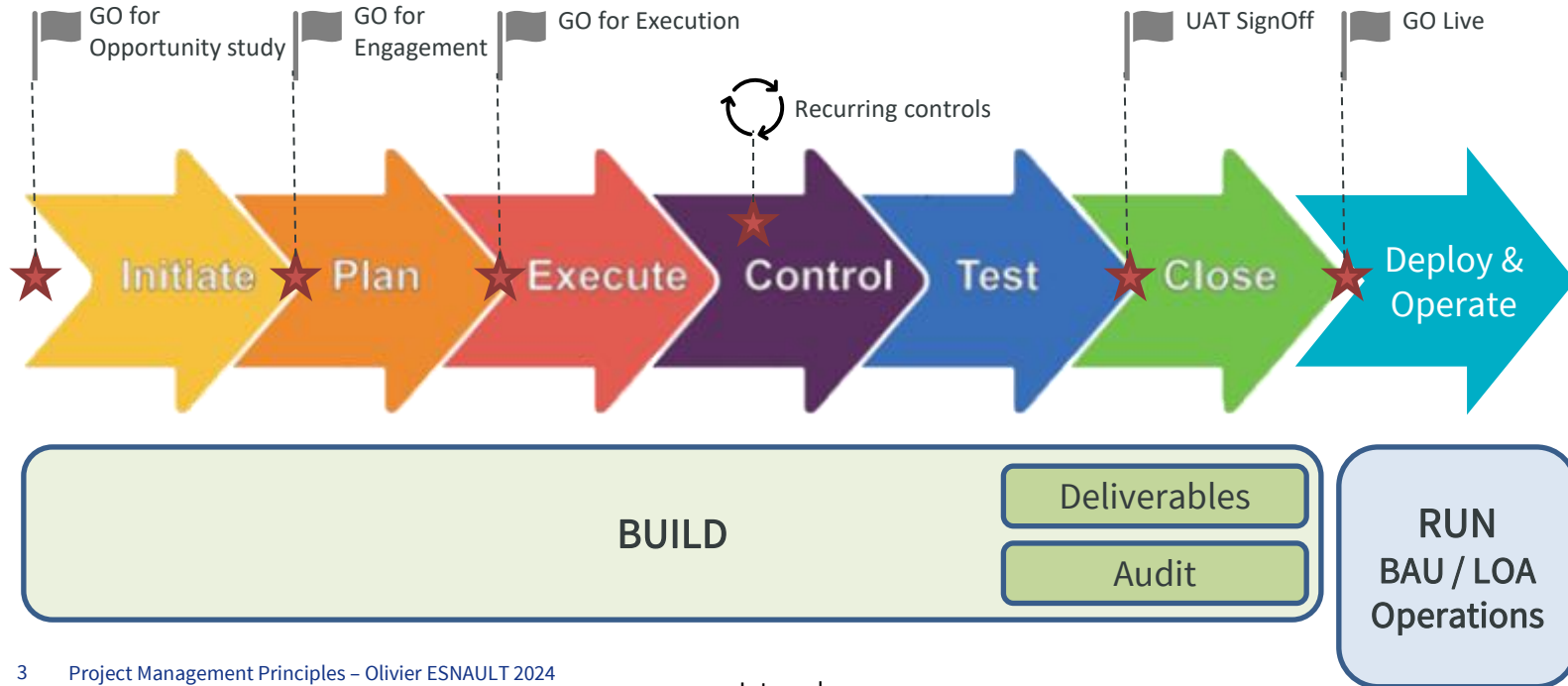
Project Management Principles

[Olivier ESNAULT](#) 2024

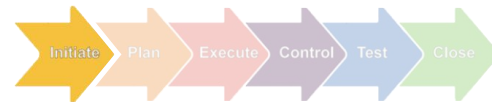
4.1

Initiating a project

Typical project's phases and Gating Process



Project phases : INITIATE

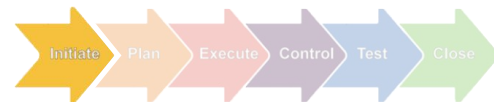


TRANSVERSAL ACTIVITES : Mobilize support functions

	Security	Data Privacy	Procurement / Legal
Key dimensions analyzed	<ul style="list-style-type: none">• Information Security• Operational Resilience (BCP, DRP)• Physical Security & Safety	<ul style="list-style-type: none">• Data storage location• Data categories• Data volumes• Number of individuals• Nature of the processing• Provider assessment	<ul style="list-style-type: none">• Workforce extension study• Manage existing and future Providers (RFI)• Contract needs : MSA, SOW, Material, Maintenance
Deliverables	Security Risk Assessment	DPIA	MSA, SOWs, RFI



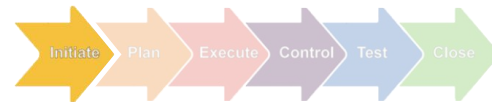
Project phases : INITIATE



TRANSVERSAL ACTIVITIES : Mobilize support functions

	Method & Quality	Finance
Key dimensions analyzed	<ul style="list-style-type: none">Methodology to be applied depending on project type and know-hows	<ul style="list-style-type: none">Cost structure (FTE, n-FTE)Pricing structureFunding AssessmentTax implications and requirementsKPI computation (payback ratio, NPV, ROI..)
Deliverables	<ul style="list-style-type: none">Operational templates	BCA

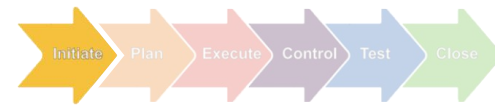
Project phases : INITIATE



OPERATIONAL ACTIVITIES : Prepare for Engagement

	Project organization	Workload estimation	Confirm technical / business concept
Key dimensions analyzed	<ul style="list-style-type: none">• Identify team members and profiles• Identify stakeholders• Identify Sponsor• Define sourcing strategy• Define TOM principles	<ul style="list-style-type: none">• Macro estimation (Abacus or Expert evaluation)	<ul style="list-style-type: none">• Assess the feasibility and validity of the project assumptions• Internal or external exercise (through RFI)
Deliverables	One Pager	One Pager	POC

Project phases : INITIATE



GO for
Engagement
Deliverables

TRANSVERSAL ACTIVITIES : Mobilize support functions



Business Case



RFI

OPERATIONAL ACTIVITIES : Prepare for Engagement

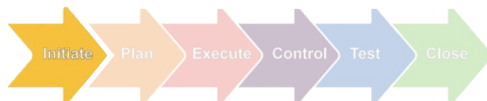


One Pager



POC

Project phases : INITIATE – One pager example



GO for
Engagement
Deliverables



One Pager

Resource Plan:
Black Belt: Robyn Broad Managers/Process Owner: Mark Warke, Business Super Product Champion, Adviser and Customer Service(A&CS) Sponsor: Jane Perry, General Manager, A&CS Coach: Matt Arculus

Problem Statement
Adviser and Customer Service (A&CS) allocate 260,000 Cash Receipts per annum to selected XXX products. The end to end process time for Cash Receipts can be up to 134 days when actual customer request is less than 10 days. The error rate in the process is about 6%. Delays and errors in allocation generate rework, lost earnings and backdating penalties. Customer satisfaction is impacted and customer complaints has been arriving all over last year regarding time on allocating the money and errors in money allocated.

Goal Statement
Reduce the number of Cash Receipts allocated outside of the Upper Specification Limit of 10 days by 20% (without a material increase in Cash Receipting errors as measured by A&CS Quality Measurement). Reduce the variance of the Cash Receipting Process from 1 to 134 days to 60 days.

Business Opportunity
1. Reduction in time spent finding policy numbers for Cash Receipts \$ 33700 2. Reduction in time spent on receipts not matched to Bill \$ 51000 3. Reduction in time spent following up New Member requirements \$118000 4. Reduction in backdating penalties @ 3.2% Illustrative Only \$ 61000 5. Increase in collection of Asset Charge \$ 36000 6. Reduction in time spent journaling/transferring Cash \$ 30700

Team Members/Support Resources:
Project Business Analyst (Georgina Mackenzie) Cash Receipting Functional Expert Team (Gary Paterson and Bruna Tricarico - Cheque Receipting and Cheque Collation Team, Helina Haimona - Business Super Processing Centre, Joanne Bowers - Investment Products)

	In Scope:	Out of Scope:
<i>Product</i>	Business Super, Investment, Life Contribution, External Rollin, Single Premium Addition, Premium	Australian Casualty & Life, Group Insurance, Internal Rollover, New Business Cash
<i>Payment Type</i>	Cash, Cheque, Credit Card, End Of Year Deposits, Deposit Book	Direct Debit
<i>Delivery Channel</i>	Receipted/Allocated by A&CS BPAF, Super On Line	Receipted/Allocated by Australia Post, or Locked Box (Westpac Bank)

Critical to Quality
<ul style="list-style-type: none"> Turnaround time <p>Please note: Accuracy (Correct cash amount always allocated to the correct plan, member and fund) is also Critical to Quality. The focus for this project is turnaround time due to the current performance against this CTQ and the current costs involved in providing the appearance of same day turnaround time to our Customers.</p>

High Level Project Milestones:

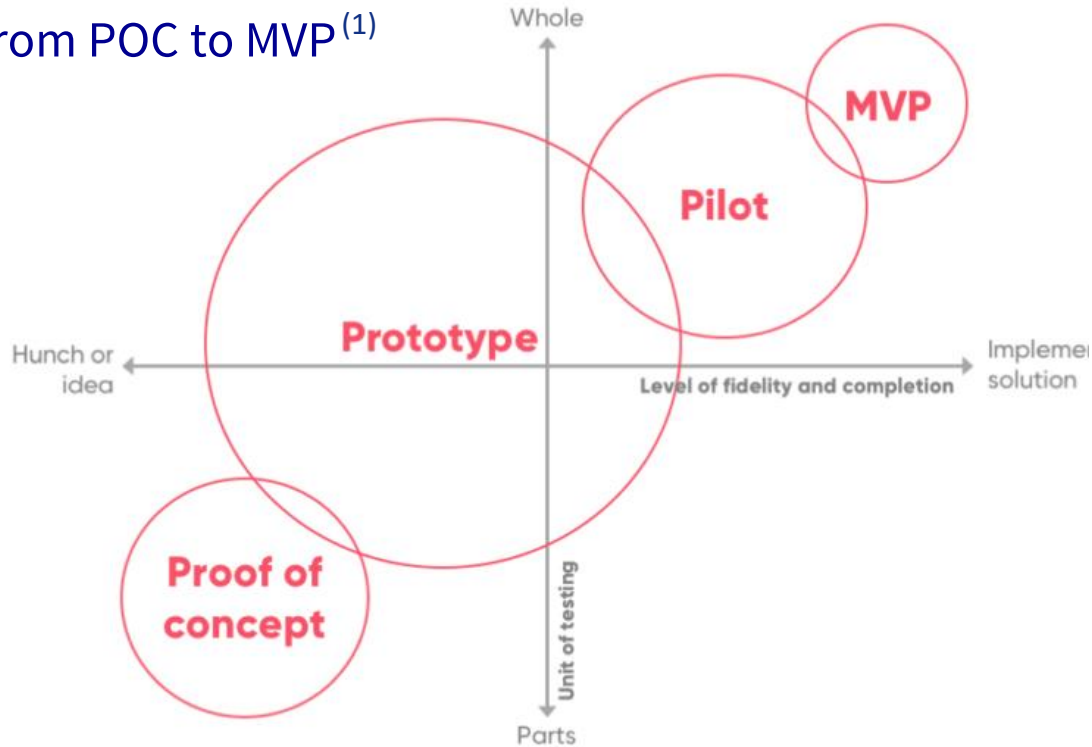
From POC to MVP⁽¹⁾

	LAB / STUDIO		REAL WORLD	
	Proof of Concept	Prototype	Pilot	Minimal Viable Product (MVP)
What is the method about?	Testing the feasibility of a crude idea or assumption to justify further development	Testing how an idea may work, look, or feel like to learn from and identify assumptions	Testing whether a solution will work in the real context to justify scaling or implementing	Testing the viability of the essential core of your solution in action and continuously adapting to create value
When is it used in the process?	Early stage	Early stage	Roll out	Live testing
What are you testing?	A hunch or assumption	An idea	A solution	The core of a solution
What is the purpose of the test?	You have a hunch and want to test if it can be made real	You have an idea and want to test how it might work and learn from it	You have a solution and want to test if it actually will work and iron out minor creases before implementing or scaling it	You have the core of a solution and want to test if there is demand, if not you change your approach
When is your test a success or proven?	When your idea is feasible	When your idea works as anticipated – if not, you must have gained insights to improve it	When a solution works as anticipated	When there is demand and the solutions works as anticipated
Who's involved in testing it?	Internal stakeholders	Users, citizens, decision makers, sponsors	Real users, decision makers, sponsors	Real users
How much development time* is needed?	A couple of minutes, hours or a few days	From half an hour up to a few days or even weeks	A few weeks up to a couple of months or a year	Continuous
What costs* are involved?	A few pennies up to 1,000 GBP	A few pennies up to 5,000 GBP	10,000 GBP up to hundreds of thousands	Core part of the business model 100k up to millions.

* These numbers are indicative



From POC to MVP⁽¹⁾



Nikola Jokić, Most Valuable Player
in NBA (the Denver Nuggets)

Appendix

French correspondance of covered concepts

#4.1 Initiating a project

Concept	French correspondance / usage
Full Time Equivalent: FTE	Equivalent Temps Plein : ETP
MSA: Master Service Agreement	<ol style="list-style-type: none">1. Contrat Cadre2. MSA
SOW: Statement Of Work	<ol style="list-style-type: none">1. Contrat d'Application2. SOW
RFI: Request For Information	Demande d'Information
RFP: Request For Proposal	<ol style="list-style-type: none">1. Appel d'Offres2. RFP
NPV: Net Present Value	<ol style="list-style-type: none">1. NPV2. VAN : Valeur Actuelle Nette
POC: Proof Of Concept	POC
MVP: Minimum Viable Product	MVP

French correspondance of covered concepts

#4.1 Initiating a project

Concept	French correspondance / usage
BCA: Business Case	Business Case
BAU: Business As Usual LOA: Lights-On Activities	1. Maintien en Conditions Opérationnelles (MCO) 2. Activités de fonctionnement
BCP: Business Continuity Plan	PCA : Plan de Continuité d'Activité
DRP: Disaster Recovery Plan	PRA : Plan de Reprise d'Activité
PMP: Project Management Plan	Plan projet