

**PROJECT PLAN**

**CIM-Project**

**Customer Information Management System**

**Lahjapaja Oy**

**Marketing and Sales**

**Proj-Amo Oy/HAAGA-HELIA**

**MKSK**

Version 0.1 Proposal

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# 1 PROJECT DEFINITION

## 1.1 Background

Lahjapaja Oy has carried out an IT-study. As a result of this study a comprehensive development program has been initiated in order to enhance the use of modern information technology in sales and marketing, warehousing and financial administration.

The goal of the IT-development program is to improve the quality of company’s data administration and thus essentially increase efficiency and productivity in the whole company.

A feasibility study was carried out concerning particularly marketing and sales functions. (See Suihko, S. Enhancing Functions and Information Systems in Marketing and Sales). This study led into a project initiation of developing a new Marketing and Sales System. Attached to this project, a separate requirements analysis has been carried out. (See Peuhu, T. Requirements Engineering Document of Marketing and Sales System).

The development of Marketing and Sales Information Systems requires a large investment program. It will be implemented by carrying out several projects. One of these projects is the Customer Information Management Project, CIM. The management of Lahjapaja has 22.12.2012 decided to launch the CIM-project in January 2013. The Order Processing Development project, OPD, will be started later during the spring 2013.

Lahjapaja has made an agreement with Proj-Amo Oy concerning the development of the new Marketing & Sales System. According to this agreement, Proj-Amo uses HAAGA-HELIA as a subcontractor. CIM-project will be carried out as a student project during the course Information System Development Project. This project plan concerns HAAGA-HELIA’s part of the CIM-project.

## 1.2 Task

The task of the CIM-project is to define, design and build a prototype of the Customer Information Management –system for Lahjapaja Oy. The prototype is used to test the functionality, usability and the features of the new system, which will be completed and finalized in the follow up construction project during summer 2013. The system needs to adequate for the business model of the company according to the documented processes of workflow.

## 1.3 Deliverables

Project deliverables are:

* System Definition and Specification Documentation - due date 25.3.2013
* System Design Documentation – due date 24.4.2013
* Test plan – 12.5.2013
* Database and a prototype of the system – 15.5.2013
* The documentation is to be converted into .pdf file.

Based on the System Requirements Analysis results, MKSK group defines designs and implements the application and related database solution, that will be centralized for Lahjapahja OY. CIM-system must be compatible with Lahjapaja’s system architecture. System prototype and related documentation will be delivered to Lahjapaja by Proj-Amo. Quality of all deliverables must meet the criteria described in Chapter 3.1.

## 1.4 Scope

MKSK group provides only the construction of the prototype of Customer Information Management system. The implementation of the finalized production version and deployment of the system are not included into this project.

## 1.5 Risk Analysis

Project risks are described and analyzed in Appendix 1.

## 1.6 Organization



Picture 1. Project Organization

## 1.6.1 Roles and responsibilities:

|  |  |
| --- | --- |
| Roles | Responsibilities |
| Steering committee | Provides campus wide leadership in support of the project  Resolves issues escalated by the project manager or project team leads  Resolves or forwards policy issues to appropriate decision-making bodies |
| Project sponsor | Makes the business decisions for the project  Makes user resources available Approves work products  Disposes of issues and project scope change requests |
| Project manager | Reports to and receives direction from Steering committee  Manages, reviews, and prioritizes the Project Plan Schedule with objective to stay on time  Provides status and progress reports to Project Sponsor or Steering Committee  Manages team members  Brings issues to the Steering Committee or Project Sponsor as needed  Identifies required project team members and constructs project teams  Evaluates risks of the project  Collects information relevant to the project  Helps the team as subsidizing working force, if needed. |
| Application development specialists | Responsible for contributing to overall project objectives and specific team deliverables  Escalates policy issues to team lead for referral to appropriate policy making bodies  This role includes all various resources necessary to execute the project plan.  Contributes with technical know-how to generating of technical documentation deliverables. |
| Project assistant | Responsible for administrative formalities and contributes to creation of project´s official documentation, reports or protocols on official meetings  Makes sure that every team member acquires the relevant information of the project  Along with the Project manager has general overview of the situation during the project development  Is responsible for keeping the project and system documentation in comprehensible condition  Participates project work as planned  Helps the team as subsidizing working force, if needed. |

## 1.7 Environment

### 1.7.1 Interest Groups of Project Result

Lahjapaja’s Financial Management Systems

Lahjapaja’s

Marketing & Sales Systems

Lahjapaja’s Ordering System

Lahjapaja’s

Invoice

Customers

**Curstomer Information Management**

**System**

System

Lahjapaja’s Warehousing System

Lahjapaja’s Personnel and

Retail Shops

Suomen Asiakastieto Oy

Picture 2. System Connections

Lahjapaja Oy is the owner and user of the new Customer Information Management System. With the use of the CIM-System, company manages and stores information about their invoice customers.

Suomen Asiakastieto Oy delivers customer creditworthiness information.

The Ordering System, Marketing & Sales System, Financial Management System and Warehousing System use customer information created and managed by Customer Information Management System.

Sales & Marketing Department sets customer discount rates and monitors delayed payments.

Proj-Amo Oy delivers all Lahjapaja’s information systems and is responsible for compatibility and usability of delivered systems.

HAAGA-HELIA can use CIM-system specifications and software in teaching purposes. HAAGA-HELIA does not have access to Lahjapaja’s real customer data.

### 1.7.2 Construction Environment

MKSK is going to use the following resembling development environment:

Software:

1. Communication software

* Skype
* Google plus
* F-Secure Anti-virus (Latest version) – for establishing VPN connection
* F-Secure SSH (Latest version)

1. Systems design and documentation

* MS-Office
* Acrobat Reader
* Git
* Dropbox

1. Creating the prototype and testing

* Visual Studio 2010
* Microsoft SQL Server 2008 R2
* Axure
* Proto io

Hardware:

Haaga-Helia´s lab environment will suffice for the development of the CIM.

## 1.8 Resources

Resources needed for successful developing of the project are:

**Staff** - There are at least 4 team members including the project manager, all skilled in C# Object Oriented programming, data modeling and database designing, UI designing and implementing and complete application testing.

**Time** – 20 hours a week per the team member, including also learning activities: class lessons and readings. The plan for time resources will be specified in Project Plan Schedule. Every team member is to record the actual time resources in the Project Plan Schedule.

**Technical resources** – see Construction environment section.

There are no extra resources to be acquired, since the project is carried out by students and Haaga-HELIA is capable of provision of all the mentioned technical resources.

No training of the team is needed either, since the students have been studying Application development as the part of their studies and are familiar with business environment.

However students are to calculate labour cost 25 €/ hour / team member. Time and this theoretical labour costs can be seen in Project Plan Schedule.

Each team member will work 329 hours + 100 overtime hours.

The formula for the cost estimation is (329 +100 ) \* 4 \* 25, therefore the estimated total cost for the project is calculated as 42900 €.

# 2 WORK PLAN

## 2.1 Phases

Project is to be monitored by steering group. Planned milestones are defined in the Project Plan Schedule.

## 2.2 Tasks, workloads and deliverables

Each and every phase and iteration has predefined starting criteria and deliverables. The individual tasks and its terms during each development phase will be designed by project manager in the Project Plan Schedule. The Project Plan Schedule will be specified in more detail on the run, but the first level of tasks will be specified at least with the time needed for accomplishing them and approving this project plan. The schedule will be the basic tool for the communications of tasks to the team members.

The criteria and deliverables will be used in quality assurance and steering. Workloads are estimated and will be monitored in hours. Workloads of tasks are described in Project Plan Schedule. Project team is responsible for recording the actual use of working hours on weekly basis.

## 2.3 Timing

The project development starts after final approving of this Project plan by the Customer, Steering Committee and Project Sponsor, which is estimated on 25.1.2013. The end of the project is agreed on 15.5.2013, when all deliverables are to be done.

The Project Plan Schedule will be created and maintained in the application Microsoft Project 2010.

Changes of the schedule during one phase are possible only on lower levels within the first level time-frame, that has been approved. In the case, that even the first level time-frame needs to change as well, the project manager is to negotiate it with the Steering Committee and mention this change in the Project status report.

## 2.4 Working Methods and Standards

Project applies working methods used by Proj-Amo Oy and HAAGA-HELIA: Object oriented –modeling methods and Unified Modeling Language -notation.

In quality assurance, ISO 9000-3 Quality management and quality assurance standards Part 3: Guidelines for the application of ISO 9001 to the development, supply, installation and maintenance of computer software will be applied.

## 2.5 Project Management

Managerial procedures

- project is carried out according to the approved project plan and Project Plan Schedule

Project reporting

- project manager monitors, records and reports status as described in project plan.

- the team is going to use GIT Hub version control system, which will enable each member of the team to see the current version of the application

- the project manager will check the status of scheduled tasks on regular meetings

Timing

- project applies approved project plan schedule

Reviews and Approval

- quality assurance reviews and testing will be carried out as planned

- steering group must approve results and accept changes of project plan

Meetings

- steering group meetings will be held according to the project plan

- project team and tutoring meetings will be held weekly on Friday at 16:00

- the project manager can summon an extra meeting, if the situation requires

- topics discussed on regular meetings should be:

- status of scheduled tasks

- what tasks are to be done for the next week

- sharing information about impediments and obstacles preventing a task from being done

- the team members can also create a list of questions about the project, that need to be clarified by steering committee or project sponsor.

Informing

- steering group takes care of the informing of the project

- project manager informs steering group and project team

- e-mail and Moodle will be used as channel for the inside information

# 3 QUALITY PLAN

## 3.1 Quality Goals

All project results must meet defined quality standards. The delivered CIM-system prototype must meet also all customer defined usability requirements. All results must be reviewed, tested and approved as planned.

To keep up the planned schedule is also essentially important. The status of the project and use of resources will be monitored by steering group, project manager and team members as described in project plan.

## 3.2 Quality Procedures and Responsibilities

Reviews and software testing will be used as quality assurance methods. All system documentation must be reviewed. Reviews and testing activities are scheduled in Project Plan Schedule, Tasks and timing. Testing must be described in detail in Test Plan produced by project team during the project. A written memo, including error report, is required from each individual review and testing occasion. Project manager is responsible for these procedures.

Project team is responsible for recording the actual working hours weekly and report them in steering group meetings so, that a comparison of used and planned workloads is shown periodically and cumulatively from the start of the project; on individual level and project total.

## 3.3 Documentation- and Version Management

Documentation must meet sufficient level of standards of good written communication and system development specific standards like UML.

Documents to be stored and delivered are:

Project documentation

* project plan
* project status reports
* final project report
* notices and minutes of meetings of project steering meetings

System documentation

* System definition and specification Documentation (OOA)
* Design documents (OOD)
* System prototype code (OOP)
* Testing documents

Version management must be applied to all project documentation and software deliverables. The development team will use GIT to ensure the version management of the application.

The documentation of the project may be updated via GIT hub as well or stored into DropBox folder. In case of Dropbox however the names of the documentation has to follow the naming convention for this project:

**documentCode\_CIM\_MKSK\_ApprovalCode\_numberOfVersion\_creatorCode**

**Document codes:**

Project Plan PP

Project Plan Schedule PPS

Steering Group Meeting Agendas SGMag

Steering Group Meeting Minutes SGMmi

Progress Report PROGrep

End Report ENDrep

Project Meeting Memos PMme

Definition Definition

Design Design

Implementation Implementation

**Approval Codes**

Approved Appr

Not Approved NAppr

**Creator codes:**

Ralf Rehn RR

Juha Pispa JH

Michal Kucera MK

Elizaveta Kantina EK

Alexey Malkov AM

Alexander Strelchenko AS

Example for this Project Plan:

PP\_CIM\_MKSK\_NAppr\_01\_MKEK

# 4 SOURCES AND REFERENCES

HAAGA-HELIA’s course documents and guidelines.

## APPENDIX 1 DEFINITION AND ANALYSIS OF PROJECT RISKS

\*) S = small, M = moderate, B =big/considerable.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Risk** | **Probability** | **Effect**  **\*)** | **Reasons** | **Precaution, protection of risks** | **Actions and measures of consequences of risks** |
| Loss of key person(s) | S | B/S | Forced deportation of team members, argue resulting in physical death of the person,  withdrawal from the course,  attendance of team members in other courses | Respecting the Finnish law, unique culture and rules, replacing the argues with a debate, understanding and positive thinking, regular meditation, good time management and activity in the course | Allocation of new resource(s) without delay.  Have to be approved by the steering group.  Flexibility in assigning of tasks and arranging times of meetings. |
| Sickness of team member(s) | S/M | M | Not predictable | Taking care of good physical and mental condition, acquiring adequate winter clothes. | Ensured healing process. |
| Loss off motivation | S | M/B | Burn out because of heavy workload in other courses, unclear tasks and guidance from our teachers | Understanding own role and contribution as part of the whole, creating a good team spirit, positive thinking and assuming Finnish “SISU”, clarification of tasks by active asking approach | Reorganizing workloads and/or timing (Have to be approved by the steering group).  Teambuilding activities |
| Delay in timing | M | M/B | Pending situations, lack of planned resources | Realistic project plan and good project management and steering. | Reorganizing tasks and timing.  Have to be approved by the steering group. |
| The value of the results becomes small or obsolete | S | M/B | Requirements or goals are not being properly understood or defined. Customer doesn’t clearly specify his own needs. | Clearing of goals and concrete deliverable together with customer experts. | Reconsideration of goals and /or deliverables. Re-planning of the project. Interrupting the project.  Have to be approved by the steering group. |
| Documentation or software files corrupted or damaged. | S | M/B | Technical reason. Industrial espionage. | Proper safety and back up procedures. | Restores from backups and safety copies. |
| Unrealistic work loads | S | M | Wrong estimates by project manager or the steering group | Good project feasibility estimation, good project management and rapid correction actions. | Reorganization and reallocation of work. Have to be approved by the steering group. |
| Lack of proper communication | S/M | S/M | Misunderstandings, technical devise problems | Developing team members’ communication skills | Correction of errors and inadequate informing procedures. |