Assessment

**Task 2**

**Undertake project work**

**BSBPMG522**



**Student Declaration**

To be filled out and submitted with assessment responses

◻ I declare that this task and any attached document related to the task is all my own work and I have not cheated or plagiarised the work or colluded with any other student(s)

◻ I understand that if I If I am found to have plagiarised, cheated or colluded, action will be taken against me according to the process explained to me

◻ I have correctly referenced all resources and reference texts throughout these assessment tasks.

◻ I have read and understood the assessment requirements for this unit

◻ I understand the rights to re-assessment

◻ I understand the right to appeal the decisions made in the assessment

|  |  |  |
| --- | --- | --- |
| **Unit Title**  **Unit Code** | | |
| **Student name** |  | |
| **Student ID number** |  | |
| **Student signature** |  | **Date** |
| **Task Number** |  |  |

|  |
| --- |
| **------OFFICE USE ONLY-----**  For Trainer and Assessor to complete:  ◻ Student requested reasonable adjustment for the assessment |

| **Completed successfully**  **Did the student satisfactorily:** | **Comments** | **Y** | **N** | **DNS** |
| --- | --- | --- | --- | --- |
| The student met with the project sponsor to gather information relevant to project initiation.  Feedback in comments. |  |  |  |  |
| The student satisfactorily completed the Project Snapshot. |  |  |  |  |
| The student completed the filing records for all relevant documents as required. |  |  |  |  |
| The student obtained approval to:   * Proceed to planning stage * Access resources to undertake the project provided approval for the project plan is obtained   The signed approval is submitted. |  |  |  |  |
| Accessed project scope and other relevant documentation.  This is evidenced by the meeting attended with the project sponsor in a simulated work environment; the review of the scenario documents to include relevant policies and procedures; the review of the project templates provided. |  |  |  |  |
| Defined project stakeholders.  This is evidenced by the completion of the project snapshot: determination and definition of key stakeholders. |  |  |  |  |
| Sought clarification from delegating authority of issues related to project and project parameters.  This is evidenced by the meeting attended with the project sponsor in a simulated work environment; the completion of the project snapshot that reflect clarity of information relevant to the project; the project initiation approval obtained by the project sponsor who reviewed the project initiation documentation prior to sign-off. |  |  |  |  |
| Identified limits of own responsibility and reporting requirements.  This is evidenced by the completion of the project snapshot: responsibilities reporting requirement are identified. |  |  |  |  |
| Determined and accesses available resources to undertake project.  This is evidenced by the meeting attended with the project sponsor in a simulated work environment; the completion of the project snapshot: resource needs are clearly stated, and project management tools are listed; student formed the project team and accessed all relevant project documentation; the student established a working relationship with the project sponsor; the student used appropriate software to complete the project; the student has received approval to access resources to undertake the project. |  |  |  |  |
| Developed a project plan in line with the project parameters.  This is evidenced by the project plan that has been developed and submitted. The plan meets the parameters defined for the project during the project initiation phase.  The plan is satisfactorily completed, and instructions met. |  |  |  |  |
| Identified and accessed appropriate project management tools.  This is evidenced by the identification of the project management tools in the project snapshot; student accessed all relevant project documentation and templates; the student used appropriate software to complete the project. |  |  |  |  |
| Formulated risk management plan for project, including Work Health and Safety (WHS)  This is evidenced by the risk plan in the project plan which requires students to include WHS risks. |  |  |  |  |
| Developed and approved project budget  This is evidenced by the budget developed in the project plan and the approval obtained by the sponsor after presenting the project plan. |  |  |  |  |
| Consulted team members and took their views into account in planning the project.  This is evidenced by the observed work in a team environment and the meeting with the project team to consult on the development of the project plan (see observation checklist provided). |  |  |  |  |
| Finalised the project plan and gained necessary approvals to commence project according to documented plan.  This is evidenced by the participation in the Role-Play to meet the project sponsor, present the draft plan for feedback, obtain approval. See observation checklist.  The assessor has checked that the changes and refinements needed in the project plan and discussed during the Role Play (see record of feedback) were applied in the Project plan.  The student has obtained approval to:   * Proceed to execution stage |  |  |  |  |
| Defined the parameter of the project including:   * project scope * project stakeholders, including own responsibilities * relationship of project to organisational objectives and other projects * reporting requirements * resource requirements   This is evidenced by the meeting attended with the project sponsor in a simulated work environment, the completion of the project snapshot, and the completion of the project plan:   * A clear scope of the project (although not in the form of a scope statement) is gathered by the project snapshot * A scope statement and a scope document are developed in the project plan. * Stakeholders and own responsibilities are clearly stated and defined * Relationship of project to organisational objectives and other projects are defined in the strategic context; there is clarity about the project status; interdependencies are identified. * Reporting requirements are defined under the responsibilities of the project management role (project snapshot) * Reporting requirements can be gathered by the project governance structure in the project plan. * Reporting requirements can be gathered by the communication plan in the project plan. * Resource requirements are stated in the project snapshot document * Resource requirements are stated in the project plan: budget items; roles and responsibilities matrix. |  |  |  |  |
| Consulted and communicated with relevant stakeholders to generate input and engagement in project planning.  This is evidenced by the meeting with the project sponsor.  This is evidenced by the meeting with the team to discuss the project plan and the meeting with the sponsor to present the project plan (see observation checklist). |  |  |  |  |
| Provided support to team members to enable them to achieve deliverables.  This is evidenced by engaging the team in the discussion about the project plan (see observation checklist). |  |  |  |  |
| Used project management tools to develop a project plan including:   * deliverables * work breakdown * budget and allocation of resources * timelines * risk management * recordkeeping and reporting   This is evidenced by the development of the following sections of the project plan:   * Scope statement and document * Work breakdown structure * Budget * Roles and responsibility matrix * Schedule * Risk plan * Filing records completed for relevant documents * Reporting to project sponsor and team during the meeting |  |  |  |  |
| If working in a group, the student has actively participated in group work with a substantial contribution that can be assessed individually for all the requirements of this task. |  |  |  |  |
| **Task Outcome: Satisfactory  Not Yet Satisfactory** | | | | |
| **Student Name:** | | | | |
| **Assessor Name**:  **Assessor Signature:**  **Date:** | | | | |

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# **Task 2 – Define and Develop a Project Plan**

| **Task summary and instructions** | |
| --- | --- |
| **What is this assessment task about?** | You are a Project Manager in charge of planning, executing and finalising a project.  To complete this task, please refer to Appendix 1 – Scenario at the end of this assessment document.  This task comprises of product-based methods of assessment and observation conducted in a simulated work environment.  You are required to:   * undertake a role-play: meet with the project sponsor (2 meetings at the initiation and planning stage of the project), * develop a written project initiation documents * develop a project plan, * meet with the team.   It has been designed to evaluate your ability to:   * access project scope and other relevant documentation, * define project stakeholders, * seek clarification from delegating authority of issues related to project and project parameters, * identify limits of own responsibility and reporting requirements, * clarify relationship of project to other projects and to the organisation's objectives, * determine and access available resources to undertake project, * develop project plan in line with the project parameters, * identify and access appropriate project management tools, * formulate risk management plan for project, including Work Health and Safety (WHS), * develop and approve project budget, * consult team members and take their views into account in planning the project, * finalise project plan and gain necessary approvals to commence project according to documented plan, * take action to ensure project team members are clear about their responsibilities and the project requirements, * establish and maintain required recordkeeping systems throughout the project.   You are required to address the following:   * **Task 2.1 Define the project:** * meet with the client to gather additional information about the project, * develop a Project Snapshot document, * obtain approval to proceed to planning stage and access available resources to deliver the project. * **Task 2.2 Define the project:** * Develop a Project Plan. * **Task 2.3 Consultation and approval** * meet with your team to discuss the draft of the project plan and ensure they are clear about their responsibilities and project requirements, * take team's inputs into consideration, * meet with the project sponsor and present the Project Plan for feedback and approval, * finalise the Project Plan based on the feedback received. |
| **What do I need to do to complete this task satisfactorily?** | * submit the completed assessment tasks, according to instructions, * complete the tasks with sufficient detail and present them in a professional manner, * use your own words and reference sources appropriately, * meet the word count where required, * use the scenario provided, * use the templates provided where required, * for your performance to be deemed satisfactory in this assessment task you must satisfactorily address all of the assessment criteria, * if part of this task is not satisfactorily completed you will be asked to complete further assessment to demonstrate satisfactory performance. |
| **Specifications** | **You must deliver/participate in:**   * meeting with the project sponsor- Task 2.1, * meeting with the project team- Task 2.3, * second meeting with the project sponsor Task 2.3.   **You must submit the following in GOALS:**   * Observation checklist for Task 2.3 * Project Snapshot * Approval to progress to planning stage and access available resources to deliver the project * Project Plan * Record of feedback about Project Plan from team and project sponsor |
| **Resources and equipment** | * Computer with Internet access, * Access to Microsoft Office suites or similar software, * Learning material, * Scenario for assessment document which includes relevant policy and procedures provided at the end of this document in Appendix 1, * Use of a project management application if possible (discuss with the trainer and assessor) * Use of the templates included in this assessment document. |
| **What will the assessor be looking for?** | Your assessor will be looking for demonstrated evidence of your ability to:   * undertake project initiation activities, * liaise with the project sponsor to define project requirements, * identify project stakeholders, * interact and work effectively with the project team, * understand your responsibilities as a project manager and perform your role accordingly, * develop project initiation documentation, * develop a comprehensive project plan to meet project requirements, * discuss and negotiate the project plan with the sponsor, * establish and maintain project record-keeping, * obtain approval at key project gates: initiation to move to planning phase and planning to move to execution phase. |
| **Re-submission opportunities** | You will be provided feedback on your performance by the Assessor. The feedback will indicate if you have satisfactorily addressed the requirements of each part of this task. If any parts of the task are not satisfactorily completed, the assessor will explain why, and provide you written feedback along with guidance on what you must undertake to demonstrate satisfactory performance. Re-assessment attempt(s) will be arranged at a later time and date. You have the right to appeal the outcome of assessment decisions if you feel that you have been dealt with unfairly or have other appropriate grounds for an appeal. You are encouraged to consult with the assessor prior to attempting this task if you do not understand any part of this task or if you have any learning issues or needs that may hinder you when attempting any part of the assessment. |

| **Procedures** |
| --- |
| 1. Review the assessment scenario, the business documentation, including policies and procedures and the project planning templates provided:  * **Appendix 1 – Scenario** at the end of this document * **Policies and Procedures** – provided in a separate folder * **Templates**: * **1** – **Project Snapshot** in Task 2.1 * **2** – **Project Initiation Approvals** in Task 2.1 * **3** – **Project Plan** in Task 2.2  1. Form a project team **in week 1 of the term**.  * six to eight team members (two to four students plus four virtual team members) who must be utilised and budgeted for, * although the assessment is worked in a group to simulate the work environment that you would experience when delivering a project in/for an organisation, the assessment submission is individual, and it will be marked as such.  1. Meet with and receive details from the project sponsor **in week 1 of the term** about your project team, cost, skills, and suggested project deliverables and timeframes. The project sponsor is played by the Trainer and Assessor in a simulated work environment. 2. Determine the relationship of the project to other projects, systems, business operations, strategic aims of organisation, and external legislative requirements. 3. In your project team (Task 2.1): 4. develop a **Project Snapshot** document, 5. obtain approval to progress to planning stage and access available resources to deliver the project.   (Templates are provided.)   1. Identify additional documentation required to determine the project and develop a **Project Plan draft** (Task 2.2). 2. Consult with your team to gather their input into the development of the **Project Plan** and make sure that they are clear about their responsibilities and the project requirements. (Task 2.3) 3. Meet with the Project Sponsor in week 3 of class (Task 2.3) to present the **draft** of the **Project Plan:**     1. gather feedback and inputs to adjust and refine the plan,    2. negotiate scope, budget, schedule, roles and responsibilities, and the proposed governance structure of the project,    3. provide the project sponsor with key information about the plan,    4. use the opportunity to keep building a working relationship with the sponsor,    5. obtain approval for all project components to move to project execution stage. 4. Finalise the **Project Plan** based on the consultation with the team members and the meeting with the Project Sponsor. |

## **Complete the following activities:**

Please list the names of the project team members (students in the team 2-4):

|  |
| --- |
| Josielli Comachio |
| Caio Goebel |
| Suzy Matias |
| Leonardo |
| Matias |
| Zoe |
| Mary |
| Phill |

## **Task 2.1 Define the project**

Schedule a time with the trainer and assessor in week 1 of the term and meet with the project sponsor (30 minutes).

Based on the meeting and the information provided in **Appendix 1 – Scenario** at the end of this document:

1. Develop a Project Snapshot document- Template 1,
2. Obtain approval in writing from the Project Sponsor to progress to the planning stage and access available resources to deliver the project- Template 2.

**Use the templates provided below and follow the instructions provided.**

Make sure to have read the **Appendix 1 – Scenario** at the end of this document before the meeting and to have prepared questions to help you complete the required project initiation documents.

**Note:** the trainer and assessor will evaluate your performance during the meeting. He/she will validate your participation and provide feedback in the marking sheet.

If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to meet with the project sponsor.

**Template 1 - Project Snapshot**

The project snapshot summarises the purpose, deliverables, stakeholders, resources, risks, interdependencies and success criteria of the project.

| **Project snapshot** | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Name of project: Home Coffee** | | | | | |
| **Project purpose:** Address the following:  To improve brand awareness and recognition  To expand to international markets  To create strategics alliances  The main reason will be developing a website for its B2C online coffee making training courses as a market strategy to improve brand awareness and recognition, also expand to international markets with a new concept to make a coffee. | | | | | |
| **Budget:** $35,000  **Overall timeframe: 3 months** | | | | | |
| **Deliverables with timeframes**  (5-7 deliverables). Add additional rows if needed.   |  |  | | --- | --- | | **Deliverable** | **Timeframe** | | Presentations | 1 week | | Information sessions | 2 weeks | | Posters | 3 weeks | | Promotional material | 6 weeks | | Tasting | 12 weeks | | | | | **Stakeholders**  ZEEMH (John Cluber and Marla Bennet), project manager, coffee drinkers that enjoy making good quality coffee at home, board directors, Josielli (project manager) and coffee producers. | |
| **Project Manager's responsibilities and reporting requirements:** | | | | | |
| **PM responsibilities when managing the project (5-7)** | * To include design, development, implementation and evaluation stages * Project status reports are due at 25%, 50% and 75% of allotted timeframe * Adhere to budgetary constraints * Controlling and closing projects * Assemble team | | | | |
| **Reporting requirements for the Project Manager. (2-5)** | * The Project Budget or Financial Report * The Project Team Contact Data * The Project Risk RegisterThe Project Status Report | | | | |
| **Resources**  Financial: $35.000  Equipments: 2 laptops  8 staff members  Meeting room provided by ZEEMH facilities  SEO software  Google Analytics | | | | **Risks**  Staff seconded to project work is already at capacity, the additional workload may impact on their work performance,lack of project management knowledge in the organisation,competing priorities due to concurrent projects,use of internal staff could stretch the project team capabilities, high-staff turnover in the client service team. | |
| **Interdependencies**  The online course development will be outsourced to a strategic partner but there's need to provide the content necessary to its development. The website should work in many languages with Japanese being one of them while or team at ZEEMH is already working on pursuing alliances to export coffee to japan. | | | | **Success criteria**   1. Breaking the project into smaller steps to correctly design, develop, implement and evaluate. 2. Being on schedule with the project’s deliveries to meet the timeframe. 3. After every objective completed there should be a time period to review and reassess the work done to keep track of the current priorities. | |
| **Project Status**  It’s decided that the courses development will be outsourced but the company will still provide information regarding the content of the courses.  The project has the constraints of time, a 3 month period to be developed, tested and launched and $35,000 budget.  It's scope is the development of the website which will act as platform for the company's coffe making courses.  It's assumed that the project will be concluded in the 3 month timeframe so the last month should be dedicated to testing prior to the launch, also the 2 bought laptops will be enough to carry on the project. | | | | | |
| **Special provisions**  N/A | | | | | |
| **Project Management Tools**  Identify and list what project management tools you will need in order to complete the project management plan and deliver the project (provide 5-7).   * Project initiation document (PID); * Camera to take pictures and film product. * Computer to download images and design website. * Software for web designing (for example Asana, Adobe) * Policies and procedures to follow company guidelines. * Project Initiation Document to get everyone on the same pages and put detailed plans, controls, and reporting mechanisms into the place. * Approved Change Requests - (PMBOK Guide) | | | | | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | |
| **Project Title: Home Coffee** | | | **Project Client:**  ZEEMH | | **Date: 03/02/2021 Version: 1** |
| **Project Sponsor:**  **John Cluber- Founder**  **Maria Bennet – Founder**  **Steven Yun - Investor** | | **Project Manager:**  **Josielli Comachio** | **File Name:**  ZEEMH website Project | | |

**Template 2 - Project Initiation Approvals**

Copy the table below in a separate document and obtain sign off from the project sponsor (the trainer and assessor) to proceed to planning stage. Scan and submit the approval table with your assessment; or provide digital evidence of approval (example: screenshot of an email from the project sponsor)

| **Approvals** | | |
| --- | --- | --- |
| **Project Title: Home Coffee** | **Project Client: ZEEMH** | **Date: 04/02/2021** |
| **Project Sponsor:** ZEEMH | **Project Manager:**  **Josieli Comachio** | |
| **Approvals:**   * **Approval to proceed to planning stage** * **Approval to access resources to undertake the project provided approval for the project plan is obtained**   **Signature from Project Sponsor for approval:**  *ZEEMH* | | |

## **Task 2.2 Develop the Project Plan**

Based on the project initiation documentation developed in Task 2.1, the meeting with the project sponsor and the Scenario for Assessment document, develop a project plan. (Template 3)

Once you have completed your first draft of the plan, consult with your team members (Task 2.3) taking their views into account. Then refine your draft and present it to the project sponsor for approval (Task 2.3) in week 3 of class.

The assessor will check that the Project Plan has been finalised based on feedback received when marking the assessment.

**Use the templates provided below and follow the instructions provided.**

**Template 3 -Project Plan**

The project plan is the basis for monitoring and controlling the project. All project information is consolidated to date, forming the basis for monitoring and controlling once the implementation of the project commences.

**Home Café**

**Project Background**

Provide an overview of the project based on your work at project initiation phase, update information if required.

Address all the following:

1. The purpose of the project
2. The project background and strategic context.
3. Other related projects
4. Objective of the project (3-5)
5. Project client/owner

(50-100 words)

|  |
| --- |
| The purpose of the project is to develop a website for its B2C online coffee making training courses. The courses are part of the marketing strategy to improve brand awareness and recognition, expand to international markets and create strategic alliances.  ZEEMH's objectives are:   * to make ZEEMH an icon brand for speciality coffee drinkers, * to develop an effective, well-placed e-commerce site for sales of coffee blends direct to the public, * to expand their market (to increase sales) without giving up on the exclusivity of the brand, * to maintain and improve infrastructure for the fulfilment of Web-based sales. |

**Project Scope Statement**

Develop a scope statement to define the project, including the overall budget and duration of the project.

(20-50 words)

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| --- |
| * website planning, development, testing and launch to be completed within 3 months from the day the Project Snapshot is approved. * budget: $ 35,000 including the project team's wages (Project Manager and Project team member engaged for the duration of the project). |

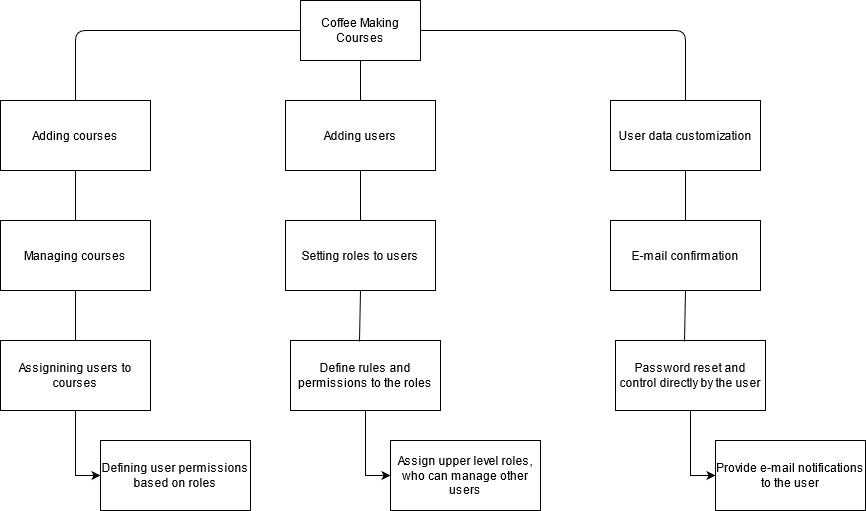
Complete a **project scope document**. This tool can be used with key stakeholders to clearly define the logical boundaries of the project. Ensure that you note any requirements that are out of scope to achieve absolute clarity about what is and is not covered by this project, and to avoid the potential for problems later on.

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Scope Document** | | | |
| **In scope**  List what is in scope | Plan, development, prediction, testing and evaluation | | |
| **Out of scope (exclusion)**  List what is not in scope | The online course development is excluded from the scope of the project (courses be developed by a strategic partner, expert in course design). | | |
| **Assumptions**  List assumptions (2-5) | - I will have access to all the resources you need to complete the project, both human and material.  - Project team members will have the resources they need to complete their individual tasks on time, from specialized equipment and software down to electricity during working hours.  - Personnel costs will not change during the project cycle. | | |
| **Constraints**  List constraints (3-5) | -I will have access to all the resources you need to complete the project, both human and material.  -Project team members will have the resources they need to complete their individual tasks on time, from specialized equipment and software down to electricity during working hours.  -Personnel costs will not change during the project cycle. | | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | |
| **Project Title: Home Coffee** | **Project Client: ZEEMH** | | **Date: 07/02/2021 Version: 2.0** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | **Project Manager:**  Josielli Comachio | **File Name:**  ZEEMH Website project | |

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| **WBS** |

Complete a Work Breakdown structure for the project. A work breakdown structure (WBS) in [project management](http://en.wikipedia.org/wiki/Project_management) is a tool used to define and group the project's discrete work elements in a way that helps organise and define the total work scope of the project. The WBS is a dynamic tool and can be revised and updated as needed by the project manager.

Develop the WBS for 3 levels work package starting with the key deliverables (3-5) and then adding work-packages (2-3/deliverable) and sub-work packages (2-3/deliverable).



| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | |
| --- | --- | --- | --- |
| **Project Title: Home Coffee** | | **Project Client:**  ZEEMH | **Date: 10/02/2021** **Version:2.0** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | **Project Manager:**  **Josielli Comachio** | **File Name:**  WBS-chart.pdf | |
|  |  |  | |

**Project Stakeholders**

Use the following template to identify areas, groups or individuals who may participate in, or are affected by, the project. Include everyone who has a vested interest. A useful question to ask is: 'What will make this project a success for you? 5-10 stakeholders.

| **Name** | **Work area** | | **Stakeholder type (client, end-user)** | | **Impact on/by project, requirements, success criteria** | |
| --- | --- | --- | --- | --- | --- | --- |
| ZEEMH Board of Directors | Management and overview | | client | | High impact, define what’s important for the project | |
| Client Services Team | Client integration and user interaction | | client | | High impact to help understand company clients | |
| Marketing | Marketing guidelines | | client | | Medium impact but necessary for the success of the project objective | |
| HR Team | User interactions, feedback and reassessment | | client | | High impact, helps better the platform approach to the client | |
| Customers | Customers | | End-user | | End-user, high impact | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | | |
| **Project Title: Home Coffee** | | | | **Project Client:**  **ZEEMH** | | **Date: 1502/2021** **Version: 2.0** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | | **Project Manager:**  **Josielli Comachio** | | **File Name:**  **ZEEMH Website Plan** | | |

**Roles and responsibilities**

It is important to identify who the major players are on the project. List the major project roles, responsibilities and the actual people involved. We have provided some suggested roles below. Adjust the Role and responsibility table according to the project. Add in any additional roles as required.

| **Role** | | **Name/s** | | **Responsibilities** | |
| --- | --- | --- | --- | --- | --- |
| **Project client/owner** The person who requires the project to be undertaken. | | John Cluber (owner), Marla Bennet (owner) and Steven Yun (investor) | | Recruit experienced and highly skilled board members. | |
| **Project sponsor/project director/project board** Senior management of the project. Accountable for the success of the project. Has the authority to commit resources. | | COO | | clarify project deliverables—for example, presentations, information sessions, posters, promotional materials, etc. You may determine your own specific deliverables so long as they are agreed to with stakeholders, meet project objectives, and adhere to budgetary constraints. | |
| **Project manager**  Person responsible for running the project on a day-to-day basis within defined authorities for cost and schedule as agreed with the project sponsor/board. | | Josielli Comachio | | develop a website for its B2C online coffee making training courses. The courses are part of the marketing strategy to improve brand awareness and recognition, expand to international markets and create strategic alliances. | |
| **Manager of the project manager** The operational/line manager who the project manager reports to on a day-to-day basis. | | COO, Project sponsor | | Manage budget, analyse project objectives, control timeframe and progress. | |
| **Project team members** Staff who will be working on the project. | | Jack Green – Marketing Officer  Marcel Red – Client service officer  Sarah White and Steven Black – Sales team  Laura Brown – Front desk officer | | * plan the website, * source web developer, * liaise with the web developer and oversee their work, * support website testing, * decide on coffee making courses and liaise with the course developer (example of courses include coffee fundamentals, coffee and spices, cooking with coffee, coffee making at home, filter brewing, cold coffee, speciality coffee, coffee art), * pricing strategy, * collect material for coffee making courses (procedures, recipes, information and data) to provide to course developer, * upload online courses, * plan website launch: communication strategy via social media including content development, * plan sales strategy for the first months after launch to achieve 250 enrolments, * define key messages for the launch, | |
| **Steering committee/ working party** To provide advice and recommendations. | | COO, Board of Directors | | Provide the use of ZEEMH facilities for the duration of the project and all other resources priorly agreed on. | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | |
| **Project Title: Home Coffee** | | | **Project Client:**  **ZEEMH** | | **Date: 07/02/2021** **Version: 2.0** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | **Project Manager:**  **Josielli Comachio** | | **File Name:**  **ZEEMH Website Project** | | |

**Project Governance**

Outline the governance structure of the project, including:

* Project authority levels - authority to approve changes to scope, budget, quality requirements and schedule. Authority to resolve issues (issue escalation). Authority to manage the project. Expert authority (expert advice).
* Project Manager (responsibilities)
* Project team (responsibilities)
* Project sponsor (responsibilities)
* Any other information related to governance (for example, a project organisation chart) if pertinent.

(80-100 words)

|  |
| --- |
| Project authority levels – Expert advice Mitch – is resonsable for monitoring the process of converting investment decisions into value for the organisation, delivering the anticipated benefits – the business outcomes and benefits to intended beneficiaries.   * Project Manager – Josielli Comachio. Responsibilities include leading project planning sessions; coordinating staff and internal resources; managing ZEEHM project progress and adapt work as required; ensuring projects meet deadlines; managing relationships with clients and stakeholders and designing and signing off on contracts.   Project team   * Financial manager– Caio. Responsibilities include distributes the financial resources of Home Coffee company, is responsible for the budget planning, and supports the executive management team by offering insights and financial advice that will allow them to make the best business decisions for the company. * Marketing manager – Leonardo. Responsible for managing the promotion and positioning of a Home Coffee brand and launch the website. Also, participation of brand awareness through the creation of marketing campaigns. * Suzi – operational manager. Responsible for managing activities that are part of the production of goods and services. Their direct responsibilities include managing both the operations process, embracing design, planning, control, performance improvement, and operations strategy.   Project sponsor - John Cluber- Founder, Maria Bennet – Founder and Steven Yun – Investor  The project sponsor evaluates the project's Home Coffee actual progress against what was planned and provides feedback to the project manager, Josielli, as necessary. Sponsors also help the project manager and team work more autonomously to solve issues as they arise, while making sure that processes are being followed. |

**Communication Plan**

Develop a communication plan for the project. Use the template provided below. **5 communication needs must be addressed.** Add additional rows if needed.

| **What** | **Who** | | **Purpose** | | **When/frequency** | | **Type/methods** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| What is communicated | Who the communication is for | | The purpose of the communication | | When the communication happens and how frequently | | The type and method of communication |
|  |  | |  | |  | |  |
|  |  | |  | |  | |  |
|  |  | |  | |  | |  |
|  |  | |  | |  | |  |
| **Project status report** | Project manager | | Review the project status and discuss potential issues | | Weekly | | email |
| **Budget review** | Financial manager | | Present project deliverables, gather feedback and possible changes related to budget | | Monthly | | Meeting face to face or video |
| **Task progress updates** | Operational manager | | Share daily progress made on project tasks | | Daily | | Email and or catch ups |
| **Project review** | Sponsor manager | | Review project status and provide feedback | | At milestone | | Meeting |
| **Marketing review** | Marketing manager | | Update and discuss potential issues or delays | | Weekly | | Meeting and reports by email |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | | | | | | |
| **Project Title: Home Coffee** | | | | **Project Client: ZEEHM** | | **Date: 21/02/2021 Version: 2.1** | |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | | **Project Manager:**  **Josielli** | | **File Name: ZEEHM website plan** | | | |

**Schedule**

Using the information that you generated in the work breakdown structure, develop a schedule for the project. Complete the milestone register below (5-10 milestones, add additional rows if needed) complete and attach to your submission a Gantt Chart (the use of excel or a project management software is recommended).

The Gantt chart must address, at a minimum: 5 milestones, associated sub-tasks (2-5 per milestones), responsibility for each sub-task, start date and end date, actual completion column and a comment/status column. Suggested link:

* <http://www.ganttproject.biz/>
* <https://www.youtube.com/watch?v=5rHCSa5ad34&feature=youtu.be>

| **Item** | **Milestone date** | **Responsibility** |
| --- | --- | --- |
| Website planning, development, testing and launch | 3 months | Project Manager |
| Define team to undertake project | 1 week | Project manager |
| Define roles and responsibilities | 2 weeks | Project Team |
| Source web developer | 3 weeks | Jack Green – marketing officer |
| Plan sales strategy for first months after launch to achieve 250 enrolments | 6 months | Sarah White and Steven Black – Sales officers |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | |
| **Project Title: Home Coffee** | **Project Client:**  **ZEEMH** | **Date: 22/02/2021** **Version:** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | **Project Manager:**  Josielli Comachio | **File Name:**  ZEEMH Website Plan |

**Budget**

The project budget is a prediction of the costs associated with a particular project. These costs include labour, materials, and other resources required to complete the project. Identify and estimate the cost of 8-10 cost items for the project. Use the template below; add additional rows if needed.

| **Cost Item** | | | **Quantity** | **Cost (including GST)**  **AU$** |
| --- | --- | --- | --- | --- |
| **Team wages** | | | 8 team members | $6.000,00 |
| **Laptops** | | | 2 | $900,00 |
| **Computer software** | | | 1 | $250,00 |
| **Advertisement** | | | 1 | $2.000,00 |
| **Office materials** | | | 8 | $200,00 |
| **Office furniture** | | | 8 | $500,00 |
| **Material for coffee making courses** | | | 20 | $1000,00 |
| **Telecommunication** | | | 1 | $1000,00 |
| **Subtotal** | | |  | **$11.850,00** |
| **Contingency (+10%)** | | |  | |
| **TOTAL** | | |  | **$13.035,00** |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | |
| **Project Title: Home Coffee** | | **Project Client:**  **ZEEMH** | | **Date: 23/02/2021** **Version: 2.0** |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | **Project Manager:**  **Josielli Comachio** | **File Name: ZEEMH Website Plan** | | |

**Risk Plan**

The template below is used to record identified risks associated with your project, analyse the impact and determine resultant action to be taken. 5-10 risks must be identified and analysed for treatment. The risk plan **MUST** include Work Health and Safety risks (2-3). Add additional rows if needed.

| **Risk** | **Likelihood (H/M/L)** | | **Impact (H/M/L)** | | **Risk response  (contingency strategies)** | | **Responsible** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Staff turnover | L | | M | | Reassessment of current priorities and deadlines and clear objectives to guide new project members | | HR |
| Scope creep | M | | H | | Clear communication with the clients needs and frequent meets to reassess current features | | Project Manager |
| Underestimation of the time | M | | H | | Frequent meets to evaluate current progress and revaluate deadlines based on the team progress | | Project Manager |
| Inaccurate project estimating | L | | M | | Thoroughly planning each step, the technology to develop the project and the necessary features to optimize development | | Board of Directors, Project Manager |
| Cross-platform compatibility | M | | H | | Thorough technology comparison assessing its available tools to optimize development | | IT Outsourced |
| Platform stability | M | | H | | Thorough technology comparison assessing its available tools to optimize development | | IT Outsourced |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | | | |
| **Project Title: Home Coffee** | | | | **Project Client:**  **ZEEMH** | | **Date: 20/02/2021** **Version: 2.0** | |
| **Project Sponsor:**  **John Cluber - Founder**  **Marla Bennet - Founder**  **Steven Yun - Investor** | | **Project Manager:**  **Josielli Comachio** | | **File Name:**  **ZEEMH Website Plan** | | | |

## **Task 2.3 Consultation and approval**

Liaise with the trainer and assessor and schedule a time in week 3 of class to:

* meet with your team and consult them on the development of the draft Project Plan (Task 2.2),
* meet with the project sponsor and present the Plan for feedback and approval,
* finalise the Project Plan based on feedback.

**Meeting with the project team**:

* meet with your team and discuss the draft of the project plan,
* take into consideration their input into the planning document,
* make sure that the project team members are clear about their responsibilities and project requirements,
* note their feedback to apply it to the project plan.

Duration: 15-20 minutes

This is an assessable task, and the trainer and assessor will evaluate your performance during the meeting using an observation checklist.

If you are absent from class, it is your responsibility to make alternative arrangements with the project team and the trainer and assessor.

**Meeting with the Project Sponsor**:

* meet with the Project Sponsor,
* present the draft project plan,
* gather feedback for and provide information about the plan,
* negotiate any proposed adjustment with the project sponsor,
* note the changes/adjustments/refinements agreed during the meeting,
* obtain approval for the Project Plan
* finalise the Project Plan draft developed in Task 2.2 based on the feedback received. Please note that the assessor will check that the feedback is implemented in your submission.

Duration: 30 minutes.

This is an assessable task, and the trainer and assessor will evaluate your performance during the meeting using an observation checklist—the project sponsor (trainer and assessor will confrm approval of the plan in the observation checklist).

If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to meet with the project sponsor.

**Use the templates provided below and follow the instructions provided.**

**Feedback**

Record below the feedback received during the meeting with the project team and the meeting with the Project Sponsor.

The feedback must be applied when finalising the Project Plan in Task 2.2.

(30-50 words)

|  |
| --- |
| **Feedback - summary** |
| The meeting with the project sponsor has brought up the need to be more detailed on the budget. Specify the resources and relocate a higher investment in order for the project to be successful. The remaining of the plan looks as expected by the sponsor and is on track to reach the estimated timeframe. |

# **Appendix 1 – Scenario**

XYZ Pty Ltd trading as ZEEMH was founded by husband and wife John Cluber and Marla Bennet. The couple decided to start an online business in 2013 to allow more flexibility in their family life. ZEEMH was an instant success, and it has grown progressively in its years of operation.

Website: <https://projectdipem.wixsite.com/zeemh> .

Starting as an online retailer of exclusive coffee brands for home-consumption, the company changed its business model by launching into the production of its own brand of coffee and serving a market of both B2B and B2C customers.

ZEEMH (pronounced Zeem –H) is an innovative Australian online retailer for premium coffee. ZEEMH:

* produces creative and high-quality coffee blends, roasting coffee in its own facilities,
* sources coffee beans from around the world, searching for the best quality coffee,
* is an online retailer of its very own coffee brand: 100% Australian owned and operated,
* delivers its products within Australia (nationwide),
* focuses on a niche B2B and B2C target market.

ZEEMH coffee is:

* quality and innovation-driven,
* a champion for sustainability,
* delivered fast,
* Fair Trade approved,
* customisable.

Since 2013, the organisation has grown and expanded, moving from the spared room of a house in Surrey Hills, Victoria, to a comfortable 2 level office in Port Melbourne, where they also have the coffee roasting and packaging plant (same building). Warehouse operations are outsourced to MCW Logistics (MCW looks after the importing operations relate to importing coffee beans in Australia and the inventory management – for raw and refined products). MCW logistics is located close to the ZEEMH headquarter.

So, fare their market has only focused on the Australian market.

## **XYZ Organisational Chart**

## **Ownership**

ZEEMH is a Proprietary Limited company, 100% Australian owned and operated.  The majority of the company is owned by founders John Cluber (40%) and Marla Bennet (40%). Steven Yun, an investor, owns 20% of the company, and he is also part of the Board of Directors as an executive director.   They have recruited experienced and highly skilled board members.

## **Key to Success**

ZEEMH has identified four keys that are instrumental to its success:

* develop a niche product that aims to reach a market of boutique coffee lovers,
* deliver exceptional customer service in all aspects of the business cycle,
* attract and retain quality staff,
* creativity, innovation and quality are the pillars the company is founded on.

## **About the Product**

Coffee beans are sourced from selected producers around the world, and they must meet the following characteristics:

* organics and Fair Trade approved,
* be produced on small to medium farms,
* pass the quality control standards of ZEEMH coffee roaster's experts.

The product:

* is roasted daily – an efficient inventory process is key to allow for the product to be shipped and re-stocked fast,
* has won several quality awards from Australian coffee associations,
* delivered free of charge for orders over $ 80.00,
* is packaged using earthbags products ( <https://www.thepackagingpeople.com.au/product/earth-bags/?gclid=EAIaIQobChMI5K3_zNai3QIViGkqCh2mgQX2EAQYBCABEgIjhvD_BwE> ).

## **Target Market**

ZEEMH has identified three distinct customer segments:

* B2B – start-up independent coffee shops that aim to establish themselves as a boutique coffee shop,
* B2B – established independent coffee shops that aim to differentiate their offering from their competition,
* B2C – coffee drinkers that enjoy making good quality coffee at home (speciality coffee drinkers). These buyers buy the beans whole to grind the coffee themselves, for the freshest cup possible. ZEEMH has made a strategic decision not to sell ground coffee (this would increase the cost of production).

## **Objectives**

ZEEMH's objectives are:

* to make ZEEMH an icon brand for speciality coffee drinkers,
* to develop an effective, well-placed e-commerce site for sales of coffee blends direct to the public,
* to expand their market (to increase sales) without giving up on the exclusivity of the brand,
* to maintain and improve infrastructure for the fulfilment of Web-based sales.

## **Vision**

ZEEMH's vision is to be the leader in the innovative and creative production and distribution of superior coffee blends for true coffee lovers.

## **Mission**

ZEEMH's mission is to provide the finest in coffee blends using the Internet to lower the cost to consumer's.  ZEEMH exists to attract and maintain customers who love quality and boutique coffee.  ZEEMH's services are designed and delivered to exceed the expectations of its customers.

## **Values**

ZEEMH:

* strongly values its people,
* promotes quality in every part of the business,
* champions innovation in our approach to business growth,
* supports creativity in our product offering,
* is committed to sustainability in everything we do,
* displays integrity in the way we do business,
* shows care and respect for our customers.

## **Strategic Direction**

ZEEMH's strategy is based on capturing the higher end of the coffee lovers' market.

Also, ZEEMH aims to create a premium brand so that they can eventually capture market share across broader geographic lines.

ZEEMH's competitive edge is:

* quality coffee,
* easy-to-use website,
* superior customer service,
* coffee blends customisation for clients.

The strategic objectives identified by the board of directors are:

* increase brand awareness among B2C and B2B customers,
* increase market share among B2C clients by 20% in the next five years,
* expand to international markets,
* increase market share among B2B clients by 3% in the next three years,
* expand the product line to coffee equipment and Zeemh merchandise,
* identify strategic alliances to expand the company's footprint nationally and internationally,
* consider a HR strategic plan to attract and retain talent in the company,
* improve quality management practices to decrease production and logistic costs and establish the brand as synonymous of quality first,
* improve customer retention and loyalty.

An integrated digital marketing campaign is recommended by the board. However, the board has highlighted how a more traditional form of marketing, such as direct marketing, should be integrated in the overall strategy. ZEEMH's clients like a personal approach to sales and interaction with the company.

The board has committed to:

* $ 210,000 in marketing expenditure for the next financial year
* $ 450,000 in recruitment and improvement of HR practices (including professional development for staff)
* $ 190,000 to quality improvement (including improvements to the roasting facilities in Port Melbourne)

## **The project**

ZEEMH has engaged you as a Project Manager to develop a website for its B2C online coffee making training courses. The courses are part of the marketing strategy to improve brand awareness and recognition, expand to international markets and create strategic alliances.

The parameters of the project That you will have to clarify with the project sponsor are:

* website planning, development, testing and launch to be completed within 3 months from the day the Project Snapshot is approved,
* budget: $ 35,000 including the project team's wages (Project Manager and Project team member engaged for the duration of the project),
* the online course development is excluded from the scope of the project (courses be developed by a strategic partner, expert in course design), however, the material for the courses must be provided by ZEEMH,
* you can employee-only 1 new resource for the project, the rest of the project team will be internal, and it will comprise of:
* 1 marketing officer, Jack Green, seconded to the project team 2 days/week,
* 1 client service officer, Marcel Red, seconded to the project 3 days/week,
* 2 remote team members from the sales team seconded to the project 1 day/every 2 weeks, Sarah White and Steven Black,
* 1 front desk officer to help with administrative duties in her role as receptionist for ZEEMH, Laura Brown,
* use of ZEEMH facilities for the duration of the project is approved,
* 2 laptops to be purchased for the project team,
* statement of work:
* plan the website,
* source web developer,
* liaise with the web developer and oversee their work,
* support website testing,
* decide on coffee making courses and liaise with the course developer (example of courses include coffee fundamentals, coffee and spices, cooking with coffee, coffee making at home, filter brewing, cold coffee, speciality coffee, coffee art),
* pricing strategy,
* collect material for coffee making courses (procedures, recipes, information and data) to provide to course developer,
* upload online courses,
* plan website launch: communication strategy via social media including content development,
* plan sales strategy for the first months after launch to achieve 250 enrolments,
* define key messages for the launch,
* quality requirements:
* reduce user's cognitive effort,
* web site in English, French, Italian, Spanish, Japanese,
* user sign up in max 3 easy steps,
* one clear call to action,
* functional links,
* branded for ZEEMH, conforms with ZEEMH website,
* each page to contain appropriate metadata,
* correct functionality of dynamic content and applications,
* foreground and background colour provide sufficient contrast for both images and text,
* browser compatibility,
* high-quality images,
* google analytics,
* SEO,
* provide seamless and engaging user experience,
* other projects are undertaken by ZEEMH at the same time:
* process improvement for coffee production,
* staff training in using new CRM,
* identify and pursue a strategic alliance to export coffee to Japan,
* known risks:
* staff seconded to project work is already at capacity, the additional workload may impact on their work performance,
* lack of project management knowledge in the organisation,
* competing priorities due to concurrent projects,
* use of internal staff could stretch the project team capabilities,
* high-staff turnover in the client service team,
* product recall for a new blend of coffee due to safety risk to the client has negatively impacted ZEEMH' s reputation for quality and a public relation effort is currently underway,
* financial resources are stretched due to investment in different projects.

## **Project conditions**

1. Six to eight team members (two to four students plus four virtual team members) who must be utilised and budgeted for. COO (project sponsor, the assessor), will determine composition of the project team.
2. The structure of the work should include roles for project sponsor, technical experts, quality assurance of deliverables, project manager (yourself initially and, after provisional approval, as negotiated with your team), and roles and responsibilities for each team member to achieve the deliverables according to standards, etc.
3. All reasonable resources (e.g. access to a room, computers, software and templates) will be provided. (Paper and telecommunications costs, for example, to be covered by students.) All resources must be costed and included in your budget.
4. Your COO (project sponsor, the assessor) will clarify project deliverables—for example, presentations, information sessions, posters, promotional materials, etc. You may determine your own specific deliverables so long as they are agreed to with stakeholders, meet project objectives, and adhere to budgetary constraints.
5. Project timeframe 3 months from the day the Project Snapshot is approved.
6. The project should include design, development, implementation and evaluation stages (with periodic quality review).
7. Project status reports are due at 25%, 50% and 75% of allotted timeframe.
8. The project must be coordinated with other organisational projects, operations, etc.
9. XYZ policies and procedures are provided in a separate folder.