Project Management Plan

Team: Online MS

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1. Introduction

Tres Fortunas is a growing brand within the hospitality sector, providing popup food trucks, a dine in space, and wholesale business from its Sydney base. Tres Fortuna's owner has contributed his success to his companies' values of:

Family **Culture** **Community**

Tres Fortuna are presented with several options for expansions including a franchise business and expansion of their dine in offering to a larger space. However, Tres Fortunas understands that expansion will require strengthening process to support supply chain, food production, customer management and back of house functions like HR and finance. Tres Fortunas has identified their existing IT environment as not conducive towards their future expansion plans.

An IT Strategy endorsed by Tres Fortunas sets out the path towards a **robust and resilient IT ecosystem support of their future expansion opportunities**. Towards this end, this Project Plan establishes a transparent and concise method through which Tres Fortunas IT transformation will be delivered. This plan will provide stakeholders at all levels with an understanding of the system and process utilised throughout delivery, along with Tres Fortuna's executives with confidence the project will be meet the state objectives, within agreed time and cost boundaries. This Project Plan will also form a point of reference for all stakeholders to understand key governance roles, including reporting functions.

2. Project Plan

This section outlines the various project management systems and structures to be employed across the project.

2.1. Project Outcomes

The Endorsed IT Strategy identified eight project outcomes as the basis for undertaking the Project. These outcomes combine to produce the vision of a **robust and resilient IT ecosystem support of their future expansion opportunities.** The Project Outcomes are:

Table 1: Project Outcomes

Project Outcomes	
Common Ecosystem	1. Retire existing IT platforms for the Tres Fortunas Foods business unit within 2 years post strategy endorsement. 2. Retire existing IT platforms for the Tres Fortunas Wholesale business unit within 5 years post strategy endorsement. 3. Retire existing IT platforms for the back of house business units within 2 years post strategy endorsement. 4. Increased staff mobility between business units by 1FTE per month, as measured by HR reporting, for the first six months post completion.
Streamline Reporting	5. Immediately reduce number of management reports by 25% through commonality of reporting post completion. 6. Provide single business level reporting to management team through common back-end data environment post completion.

2.2. Project Scope

The scope of Tres Fortuna's IT Transformation includes the establishment of a **robust and resilient IT ecosystem support of their future expansion opportunities.** Specifically, the project will deliver a cloud-based SAP solution that provides inventory management, human resources, financial management, customer relationship management, management reporting and related modules. The project implementation will be delivered in stages across the three Tres Fortunas business units. The scope of project includes:

1. **System Design.** Through stakeholder engagement a Systems Requirement Brief will be prepared to capture the functionality required from the SAP system. This will form a reverse brief back to the management unit for agreement before works progressing.

2. **Supplier Agreement.** As the supplier (SAP) has already been selected through the strategy. Negotiations with SAP around pricing structures will occur based on the Systems Requirements Brief. The outcome of this will be a signed Supplier Agreement with SAP to meeting Tres Fortunas short- and long-term requirements.

3. **Development.** The Systems Requirement Brief will form the basis for the SAP solution development. This stage will include development and testing to ensure the system is robust and ready for implementation.

4. **Training.** Business Unit staff will be trained in the use of the new systems at least 1 month prior to system roll out. This training will include in depth training for a small group of system champions to support on the job learning.

5. **Roll Out.** The new system will be implemented at in stages across the business to ensure level of change within the organisation does not exceed the organisations capacity to change.

6. **Data Migration.** In parallel to the new system being implemented existing data will be migrated into the new system and appropriate meta-data analysis and mapping to ensure robustness of historical data.

7. **Post Implementation Support.** Support the new system will be available for six months post implementation. This support will aim at identifying and correcting bugs within the system and ensuring the products is fit for purpose.

In delivery the above scope, the following items are not included:

1. Hardware upgrades
2. Augmentation to existing services such as power and networks
3. Ongoing training of new staff.

2.2.1. Work Break Down Structure

To clarify the scope of the project, a WBS has been prepared, a summary of which is shown in Figure 1, the detailed version is presented in Appendix A.
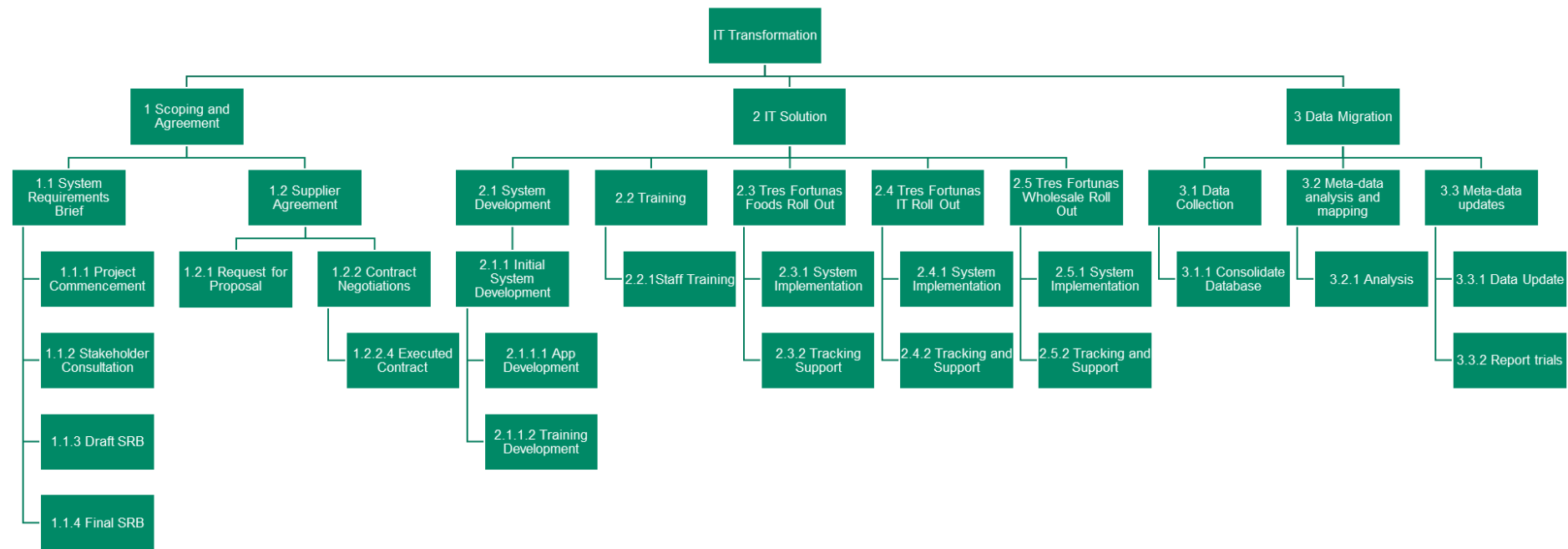
Figure 1: Summary WBS

2.3. Organisational Change

The project has been established in a manner to support Organisational Change through the Kotters 8 step change model (Appelbaum, et al., 2012) as shown in Figure 2. The main method to achieve this is the governance model, along with the proposed approach.

Kotter's Model	Approach to Address	Supporting Document
1. Establish a sense of urgency	• CEO seeking engagement of a consultant • Governance structure incl. Project Steering Committee and Project Control Group	• IT Strategy • Project Plan
2. Create a guiding coalition	• Governance structure incl. Project Steering Committee and Project Control Group, IT Implementation Working Group	• IT Strategy • Project Plan
3. Develop a vision and strategy	• CEO seeking development of a Strategy	• IT Strategy • Project Plan
4. Communicate the change vision	• Governance structure incl. Project Control Group Implementation Working Group and User Working Group	• IT Strategy • Project Plan
5. Empower broad-based action	• Governance structure incl. Project Steering Committee and Project Control Group, IT Implementation Working Group	• Project Plan
6. Generate short term wins	• Staged Approach to Delivery	• IT Strategy • Project Plan
7. Consolidate gains and produce more change	• Staged Approach to Delivery • Governance structure incl. Working Group and User Working Group	• IT Strategy • Project Plan • System Requirements Brief
8. Anchor new approaches	• User Working Groups to have super users	• Project Plan

Figure 2: Kotters Change Model

2.4. Project Governance Structure

Project Governance ensures roles and responsibilities are understood *'…establishing the culture and environment that enables a collection of diverse individuals to evolve into a high-performing project team.'* (Project Management Institute, Inc, 2021). A high-level organisational structure can be seen in Figure 3.

Figure 3: Tres Fortunas Organisational Structure

Building upon the organisational structure, the following Governance Model is proposed for this Project.
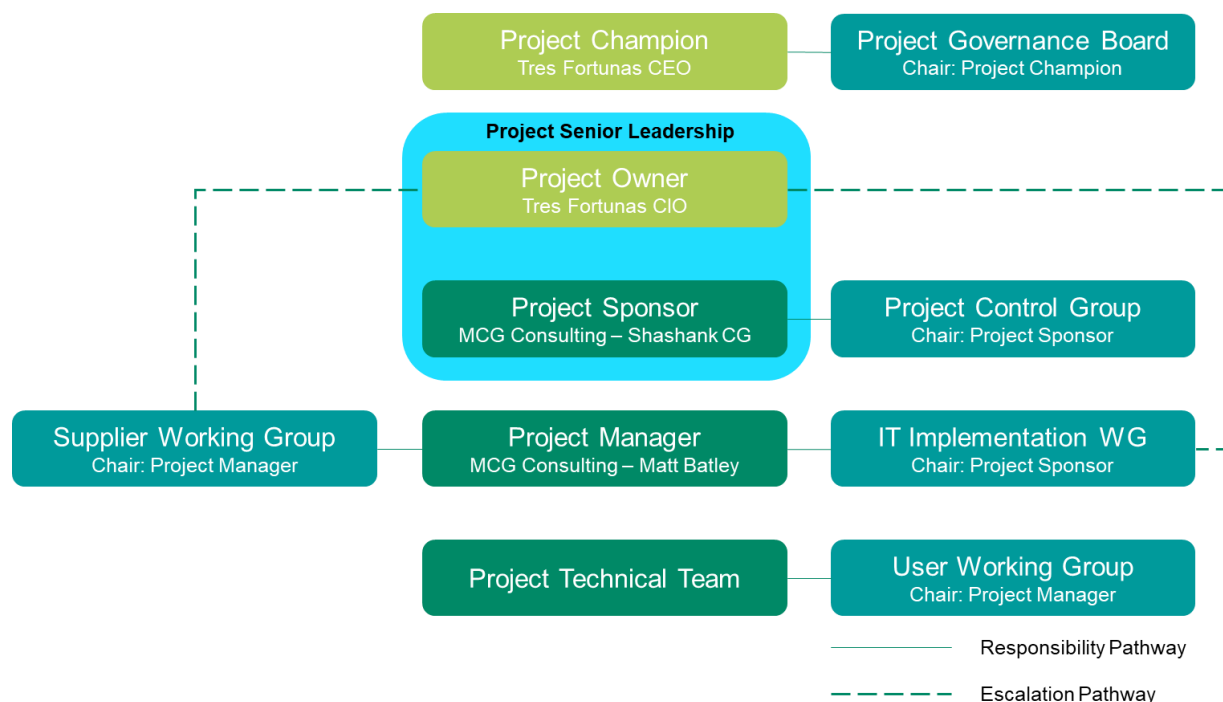

Figure 4: Project Governance Model

The roles identified in the Governance Model are outlined in Table 2.

Table 2: Project Governance Roles

Governance Role	Position	Role Definition (Zwikael & Meredith, 2018)
Project Funder	Tres Fortunas CFO	• Senior executive who commits funds and/or approves the allocation of resources
Project Champion	Tres Fortunas CEO	• Person who develops business case and presents it to the funder
Project Owner	Tres Fortunas CIO	• Senior manager held accountable for realizing the business case • Acts on behalf of the funder throughout the Project
Project Sponsor	MCG Consulting – Shashank CG	• Senior manager who provides political and top management support for the project manager
Project Manager	MCG Consulting – Matt Batley	• The person held accountable for the delivery of the project

The committees and working groups expected to be formed during the project, along with attendance are in Table 3. Through these committees' openness and transparency can be maintained and organisational values upheld.

Table 3: Project Governance Committees

Committee	Chair	Attendees
Project Steering Committee (PSC)	Project Champion	Project Owner Project Sponsor Project Funder
Project Control Group (PCG)	Project Owner	Project Sponsor Tres Fortunas Management Team Project Manager Others as required by the Chair
IT Implementation Working Group (WG)	Project Sponsor	Project Manager Tres Fortunas CIO Tres Fortunas IT Manager Others as required by the Chair
Supplier WG	Project Manager	SAP Client Representative Tres Fortunas IT Manager Others as required by the Chair
User WG	Project Manager	Tres Fortunas IT Manager Business Unit Champions Others as required by the Chair

2.5. Project Culture

PM Bok outlines that *'By fostering inclusive and collaborative environments, knowledge and expertise are more freely exchanged, which in turn enable better project outcomes.'* (Project Management Institute, Inc, 2021). PM Bok further outline organisation and project culture are key to fostering such an environment. Towards this end a Project Culture Workshop will be held with the PCG.

The workshop will focus on the cultural expectations of the Project Champion and aim to facilitate each member to live Tres Fortunas value and vision for the project.The outcomes of the Project Culture Workshop will be a Project Culture Charter. This Charter will clearly outline what day to day success looks like, what good behaviour across the project team looks like, and what behaviours to avoid. The Project Culture Workshop will also clarify escalaction pathways. Subsequent Culture Workshops will be held as needed.

2.6. Stakeholder Management

The approach to project planning and delivery will be cognizant of the role stakeholders play within project success. As outlined in PMBOK *'Projects are performed by people and for people. This performance domain entails working with stakeholders to maintain alignment and engaging with them to foster positive relationships and satisfaction.'* (Project Management Institute, Inc, 2021). The process for effective stakeholder engagement (Figure 5) will be used by the Project.

Figure 5: Effective Stakeholder Engagement (Project Management Institute, Inc, 2021)

2.6.1. Stakeholder Identification and Mapping

To understand the role and requirement for various stakeholders across the project lifecycle an identification and mapping exercise has been undertaken Figure 6.
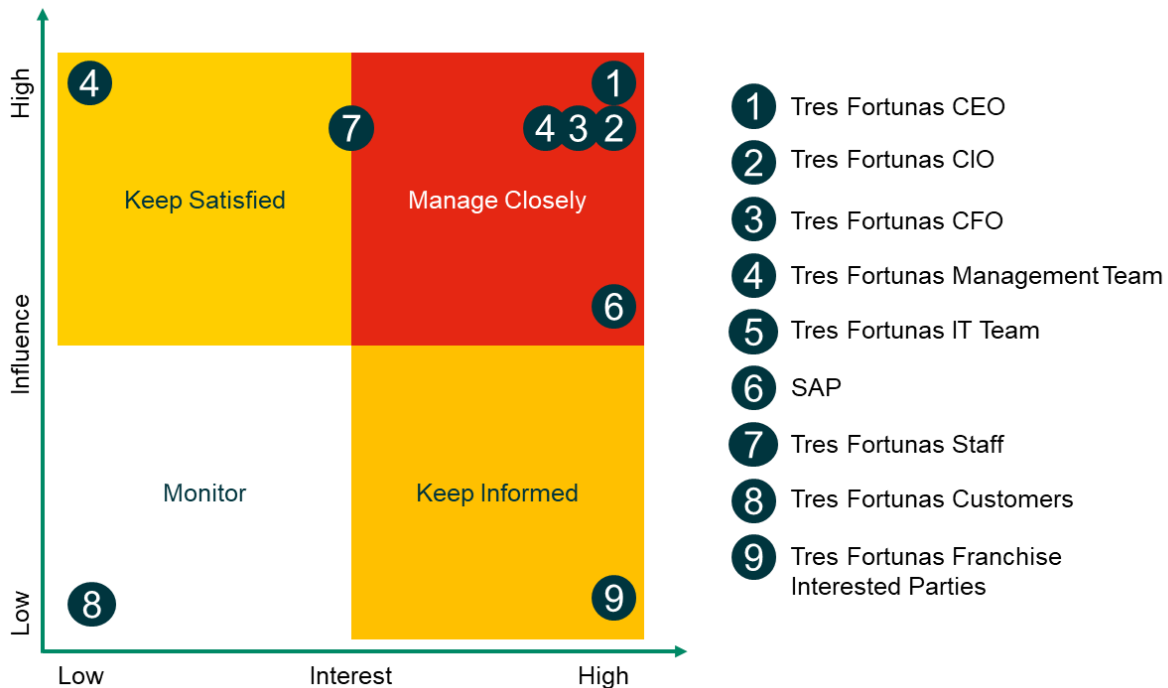
Figure 6: Stakeholder Map

When we consider the CEO, CFO and CIO, both these stakeholders are key to project success and have high interest and high influence. The CEO has been nominated as the Champion, the CFO Funder and Champion, with the CIO as the Owner. They have been proposed for attendance at the PSC.

The IT team is considered to hold a similar position to the CIO, with particularly high interest and influence on the project success. It is proposed the IT Team will have a role on the IT Implementation WG, the Supplier WG and the User WG through the IT Manager.

The staff are considered to have high influence and borderline high interest. Tres Fortunas value of Family supports this, without inclusion these stakeholders may derail project delivery. It is proposed representative from each business function are members on a User WG. This User WG will focus on documentation the system requirements, testing the product and transition to champions following implementation. Membership of the User WG will be initially set by the Tres Fortunas Management Team.

Actions for all stakeholders from the mapping are captured in Table 4.

Table 4: Stakeholder Management Approaches

Stakeholder	Action
CEO	• Project Champion in Governance Model • Member on PSG
CIO	• Project Owner in Governance Model • Member on PSG and PCG
CFO	• Project Funder in Governance Model • Member on PSG
Management Team	• Members on PCG
IT team	• Members on IT Implementation WG, the Supplier WG, and the User WG and the IT support staff
SAP	• Member on Supplier WG
Staff	• Representative from each staff group members on User WG. • Membership of User WG set by Management Team. • Members of User WG act as conduit to the organisations, provide feedback to the development team. • monthly project newsletter to all staff.
Customers and Potential Franchisees	• Nil

Table 6 provides an overview of meeting frequency and purpose for the various committees and working groups.

Table 5: Meeting Frequency and Purpose

Meeting	Frequency	Purpose
PSC	Quarterly	*'…ensures the project progresses according to plan and the business case is realized. The steering committee is typically chaired by the project owner, and may include members from the performing entity, as well as other key stakeholders.'* (Zwikael & Meredith, 2018)
PCG	Monthly	Provide a form to raise project issues, and review progress and performance against organisational objectives and values. Escalation point for matters to the Project Governance Board
IT Implementation WG	Weekly	Raise identified issues relating to the solution development or IT system implementation. Provides a forum for informal review and feedback on the Project and escalation point if required.

Meeting	Frequency	Purpose
Supplier WG	Weekly	Provide necessary information to develop the IT solution and a forum for review and feedback on the Project.
User WG	Weekly / Monthly	Gather information necessary to develop the final IT solution and a forum for informal review and feedback on the Project.

2.7. Project Schedule

The project schedule has been developed based on the WBS (Section 2.2), a project gantt chart can be seen in Appendix B. The Project has been generally based on a waterfall approach, however the following activities are proposed to occur using an Agil Approach:

- 2.1.1.1 App Development
- 2.1.1.2 Training Development
- 3.3.2 Report Trials
- 2.3.2 and 2.4.2 Tres Fortunas Foods and IT Implementation Tracking and Support

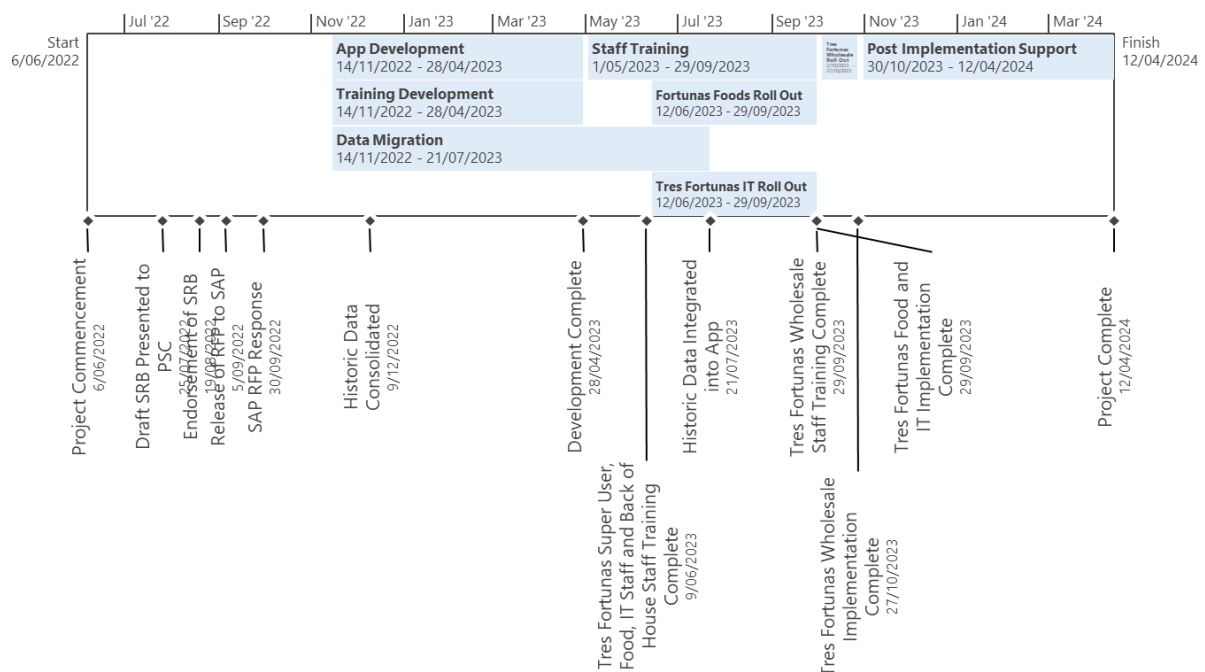A summary schedule is shown in Figure 7.

Figure 7: Summary Schedule

2.8. Risks and Opportunities

The project will use the organisations risk process and procedures to identify risks and plan treatments at key stages through delivery. A summary of the organisation risk thresholds can be seen in Appendix C. The initial Risk Register is included at Appendix D. An initial risk identification was undertaken, the results can be seen in

Probability		VLO	LO	MED	HI	VHI
	VHI					
	HI				R5	R2
	MED					
	LO				R1, O1, O2	
	VLO					R3, R4
		VLO	LO	MED	HI	VHI
				Impact		

Figure 8.

Probability		VLO	LO	MED	HI	VHI
	VHI					
	HI				R5	R2
	MED					
	LO				R1, O1, O2	
	VLO					R3, R4
		VLO	LO	MED	HI	VHI
				Impact		

Figure 8: Identified Risks (Pre-Treatment)

3. Recommendations

This Project Plan has been prepared to support organisational confidence in delivering Tres Fortunas IT Transformation Project, accordingly it is recommended the Management Team:

1. **Endorse** the Project Plan to underpin the delivery of the Project and allocate resources across the project
2. **Endorse** the Project Champion as the CEO and note the time commitment of half a day to attend the Project Steering Committee meetings quarterly
3. **Endorse** the Project Owner as the CIO and note the time commitment associated with attending the Project Steering Committee, Project Control Group and collaboration with the Project Sponsor
4. **Endorse** MCG Consulting as holding the Project Sponsor and Project Manager roles
5. **Endorse** the Management Teams position on the Project Control Group and note the monthly time commitment
6. **Seek** nominations from the Management Team for staff elevation to the User Working Group and note the time commitment for their attendance
7. **Note** the significant commitment from the Manager IT throughout the Project
8. **Endorse** the project schedule as being the time for implementation

4. Conclusion

Tres Fortunas is on the cusp of significant expansion, having established its brand with the Sydney hospitality sector. The company's values of Family, Culture, Community have been the foundation of the business to date and will continue to be the focus on the business's expansion. However, if Tres Fortuna's is to realise the expansion opportunities before it, improvements to its IT Systems and Process are critical.

The proposed IT Transformation project is not in itself overly complex, however the management of system implementation in an operating environment places some challenges on the project team. Accordingly, MCG Consulting has presented a Project Plan with Kotter's change model at its core shaped to the Tres Fortunas context.

The Project Plan proposed to leverage the below governance model is supported by robust stakeholder mapping to enable project implementation.
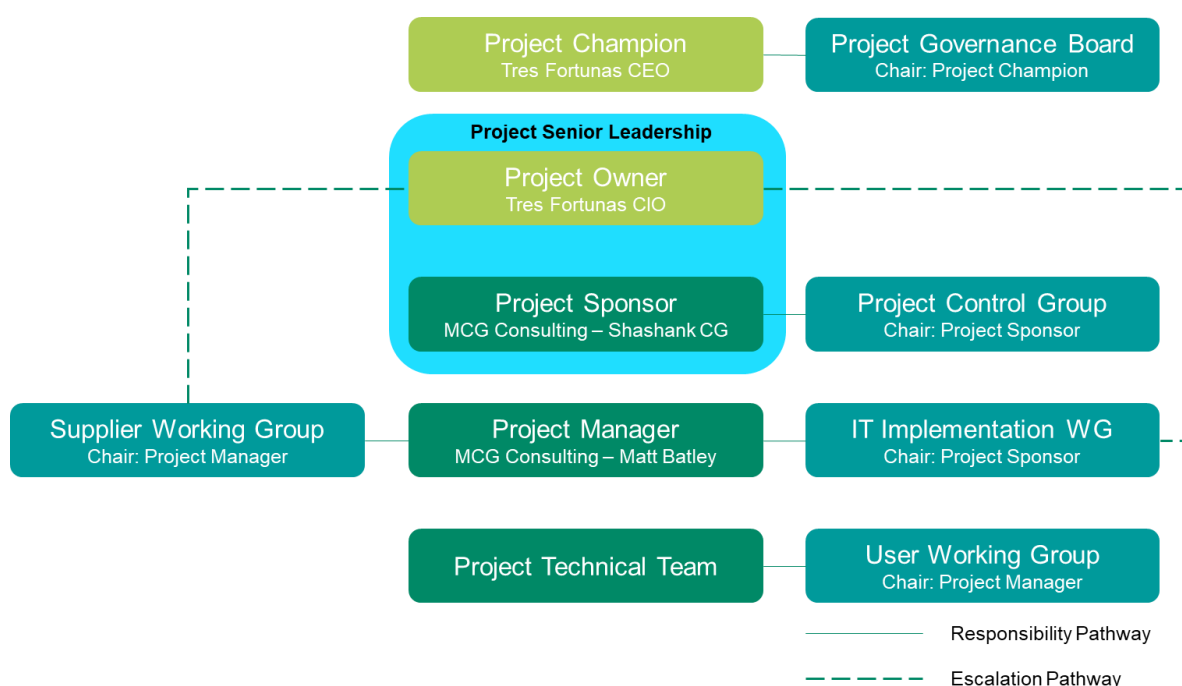
To achieve the proposed Project Objectives a detailed project WBS and Schedule has been prepared, a summary of which is shown below.
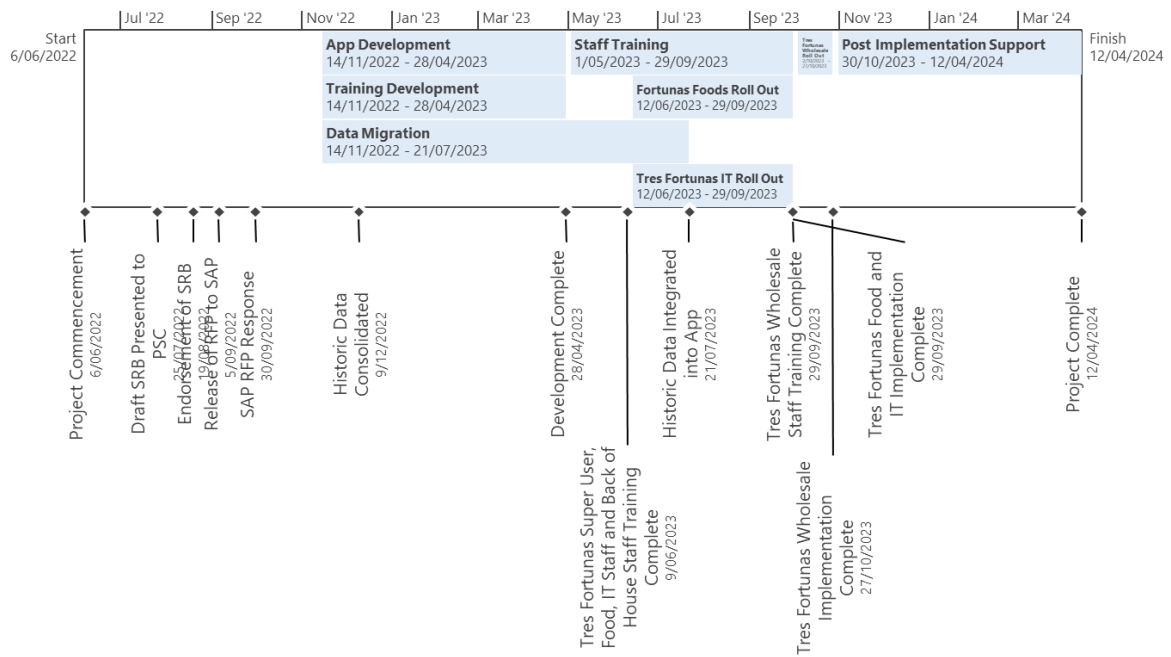
MCG consulting is confident implementation of the recommendations will appropriately balance the scope, cost, and schedule for the project. This Project Plan also outlines the approach to managing risk through the project Lifecyle.

5. References

Project Management Institute, Inc, 2021. *THE STANDARD FOR PROJECT MANAGEMENT AND A GUIDE TO THE PROJECT MANAGEMENT BODY OF KNOWLEDGE.* Seventh edition ed. Newtown Square, Pennsylvania: Project Management Institute.

Zwikael, O. & Meredith, J. R., 2018. Who's who in the project zoo? The ten core project roles. *International Journal of Operations & Production Management,* 38(2), pp. 474-492.

Appendix A: WBS
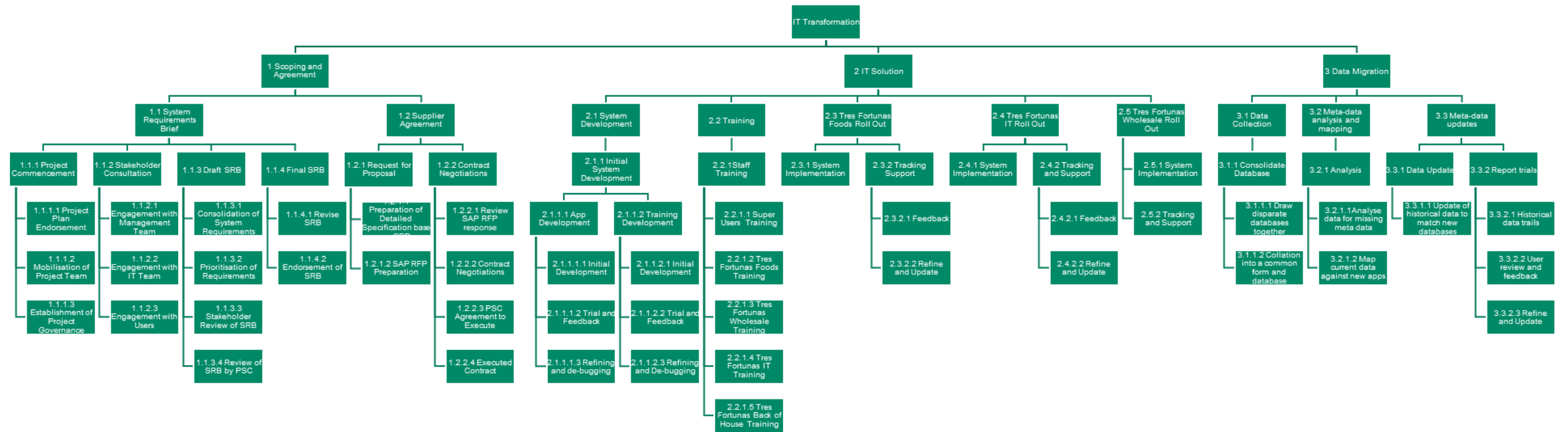
Appendix B: Schedule

Appendix C: Organisational Risk Thresholds

The following matrices present Tres Fortunas risk thresholds at associated levels.

Probability matrix

Scales	Probability of occurrence
Very High	Greater than 80%
High	60%-80%
Medium	40%-60%
Low	20%-40%
Very Low	Below 20%

Impact matrix

Scales	Overall	Cost	Schedule	Scope
Very High	Have a severe impact on achieving one or more project objectives	>40% cost increase	>20% time increase	Project output is effectively useless
High	Have a significant impact on achieving one or more project objectives	20-40% cost increase	10-20% time increase	Scope reduction unacceptable to project funder
Medium	Have a moderate impact on achieving one or more project objectives	10-20% cost increase	5-10% time increase	Major areas of scope affected
Low	Have a minor impact on achieving one or more project objectives	<10% cost increase	<5% time increase	Minor areas of scope affected
Very Low	Have little or no impact on achieving project objectives	Insignificant cost increase	Insignificant time increase	Scope decrease barely noticeable

Appendix D: Risk Register