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| INTERNATIONAL SOCIETY FOR KRISHNA CONSCIOUSNESS, BANGALORE  ISKCON Bangalore |
| **Project Management Plan** |
| ERP IMPLEMENTATION |
| Project  Prepared by  Contributors  **Jaya Ganesh G, Manager (ERP)** |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Description | Revised On | Approved By |
| 1.0 | Initial Version | Sep 18, 2015 | Amitasana Dasa |
| 1.0.1 | Included the Table of Contents. Fixed problem with the numbering of the headings. | Sep 19, 2015 |  |

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# Introduction

Touchstone Foundation is a for-profit initiative to support the religious and charitable activities of ISKCON, Bangalore, a charitable society registered under Karnataka Societies Registration Act 1960, with the objective of propagating Krishna Consciousness all over the world, as explained by Srila Prabhupada, whose teachings are based on Bhagavad-gita and Srimad Bhagavatam.

Currently we have disparate systems used by various departments & business units of ISKCON Bangalore & the associated trusts. Tally (multiple instances), Destiny ERP, PRISM (two instances) Dhananjaya, Guest House Management, Outlet Billing software, Subscription Management are some of the applications used. Many of the processes are handled manually. In TSF-Gifts out of 61 processes, around 19 are handled manually. In TSF-Foods 22 out of 55 are manual.

The use of disparate systems and manual processes are resulting in a) audit and control issues, b) redundant data entry, c) repeated reconciliation, d) loss of data integrity, e) data availability issues. This has potential impact on a) meeting the statutory compliances b) timely decision making c) stakeholder satisfaction and d) man-power requirement.

The solution is (1) to implement an ERP solution to integrate all departments and functions (finance, warehousing, human resources, sales and marketing, purchasing, manufacturing, distribution) across the organization into a single system by using a common database, thus providing fast and easy (real-time) access to information to make business decisions; (2) to integrate the Donation Management System (Dhananjaya), Payroll and POS (Guest House, Retail, Hospitality) with the ERP.

Touchstone Foundation has procured the licenses for Microsoft Dynamics NAV 2013 R2 in March 2014.

|  |  |  |
| --- | --- | --- |
| Sl. No. | Particulars | QTY |
| 1 | Starter Pack of Microsoft Dynamics NAV 2013 Server including 3 Unlimited CALs | 1 |
| 2 | Extended Pack of Microsoft Dynamics NAV 2013 | 1 |
| 3 | Additional Tables for customization or any integration needs | 100 |
| 4 | Full concurrent user licenses | 100 |
| 5 | Limited concurrent user licenses | 50 |

However, there was a delay in implementation due to cash flow issues and various other factors.

After thorough scrutiny, Touchstone Foundation has partnered with ITTI Pvt. Ltd., for implementation of the NAV for four of the legal entities (Goloka Seva Trust, Touchstone Foundation - Gifts, Touchstone Foundation - Foods and ISKCON) and to train the internal team in configuring the product for the other associated trusts and providing day-to-day operational support (L1 and L2). With mutually agreed terms a letter of intent had been issued to ITTI to start the project from September 1, 2015.

# Project Details

|  |  |
| --- | --- |
| Project Code | PA003 - ERP Implementation |
| Project Name | Implementation of Microsoft Dynamics NAV 2013 R2 |
| Project Objectives | Implementation of ERP to integrate all the departments and business units.  Integration of Donation Management System & Point of Sales applications.  Standardization of business processes (wherever possible).  Ensure availability of information to the management for decision making.  Support management in executing a strategy of long-term value creation.  Simplify and expedite day-to-day operations through automation.  Ensure proper control procedures in day-to-day operations. |
| Tentative Start Date | September 01, 2015 |
| Tentative End Date | March 31, 2016 |
| Budget Allocated | INR 50,00,000.00 (exclusive of internal resources) |

# Project Scope Management

## Current Scope

|  |  |
| --- | --- |
| Project Scope | Configuring all modules of MS-Dynamics NAV 2013 R2 (Financial Management, Purchase, Warehouse, Sales and Marketing, Human Resources, Jobs and Services) by the implementation partner for four trusts (TSF-Gifts, TSF-Foods, GST and ISKCON) as per the business requirements identified and documented during initial study & gap-fit analysis.  Configuring the modules of MS-Dynamics NAV 2013 R2 for the other trusts (SRGST, SKBST, SNGST, SVST, SNST, HKM, GBC, NIVE, SST, BBT, TSF-General) by internal team with the help of the service provider.  Migration of master data and cut-off data for all the trusts.  Customization of the product to address specific feature requirements identified during initial scoping.  Integration of Donation Management System, Guest House, Payroll and the POS solutions for retail and hospitality. |
| Out of Scope | Finalizing the POS solution and the hardware infrastructure for that.  Extending the ERP for the trusts functioning from Vaikuntha Hill. This will require connectivity between Hare Krishna Hill and Vaikuntha Hill.  Maintenance, Fleet Management, Sub-contracted Activities (house-keeping and security etc.) Venue management, Event Planning and Management, HRMS, Performance Management System, Preaching Programs, Magazine Subscription & Job Activities connected to magazine printing, Content Management, Document Management Systems are out of scope.  Mobile Applications and Integration with Mobile Apps are not in scope. |

## Request for Change

Changes in the scope of the project may be initiated by the Project Manager, Stakeholders or any member of the Project Execution Team.

### Scope Change

Changes to the initial scope identified during the course of the project. Any changes to the scope - addition or removal - shall be approved by the Project Sponsor and shall be intimated to all the Stakeholders. The project documents (scope, schedule and cost) shall be updated to reflect the changes accordingly.

For example, at present we are not sure whether we need the manufacturing module for TSF and Krishnamrita. Also TSF has not procured the licenses for LS Retail and LS Hospitality. But these are included as part of the scope, but may be excluded later.

### Customization

The scope addresses configuration of NAV standard features & customizations identified during initial scoping. For any other customization requirements identified during the implementation phase, the service provider shall suggest

1. standard industry practice that can be adopted to avoid customization
2. work around to address the specific business need

If the options (a) and (b) are not feasible, we shall consider customizing the product, subject to the following conditions:

1. the required customization shall not impact the product architecture which shall make it difficult to apply the future upgrades to the product
2. the need for such customization is justified from business perspective

All the customization requirements shall be approved by the **Project Sponsor**.

### Requirement Change

Changes to any requirements documented in the signed off FRD. After the sign off, one of the stakeholder may discover something that needs correction or there may be some changes to the process that need to be accommodated. A formal change request approval process shall be followed in such scenarios. All change requests will be documented in the standard **RFC** (request for change) format. The change request will be **reviewed by the Project Execution Team** in consultation with the service provider (a) to study the impact on the schedule and cost and (b) to justify the need for change from business perspective. The report is submitted to Project Sponsor for approval. Upon approval of scope changes by the Change Control Board and / or Project Sponsor, the Project Manager shall update all project documents (to reflect the changes in scope, schedule and cost) and communicate the same to all stakeholders.

## Change Management Process

**Step 1:** Identify and communicate the need for a change (Stakeholder / any Team Member)

**Step 2:** Log change in the change request log (Project Manager) The project manager will maintain a log of all change requests. All change requests will be logged in the change control register by the Project Manager and tracked through to completion whether approved or not.

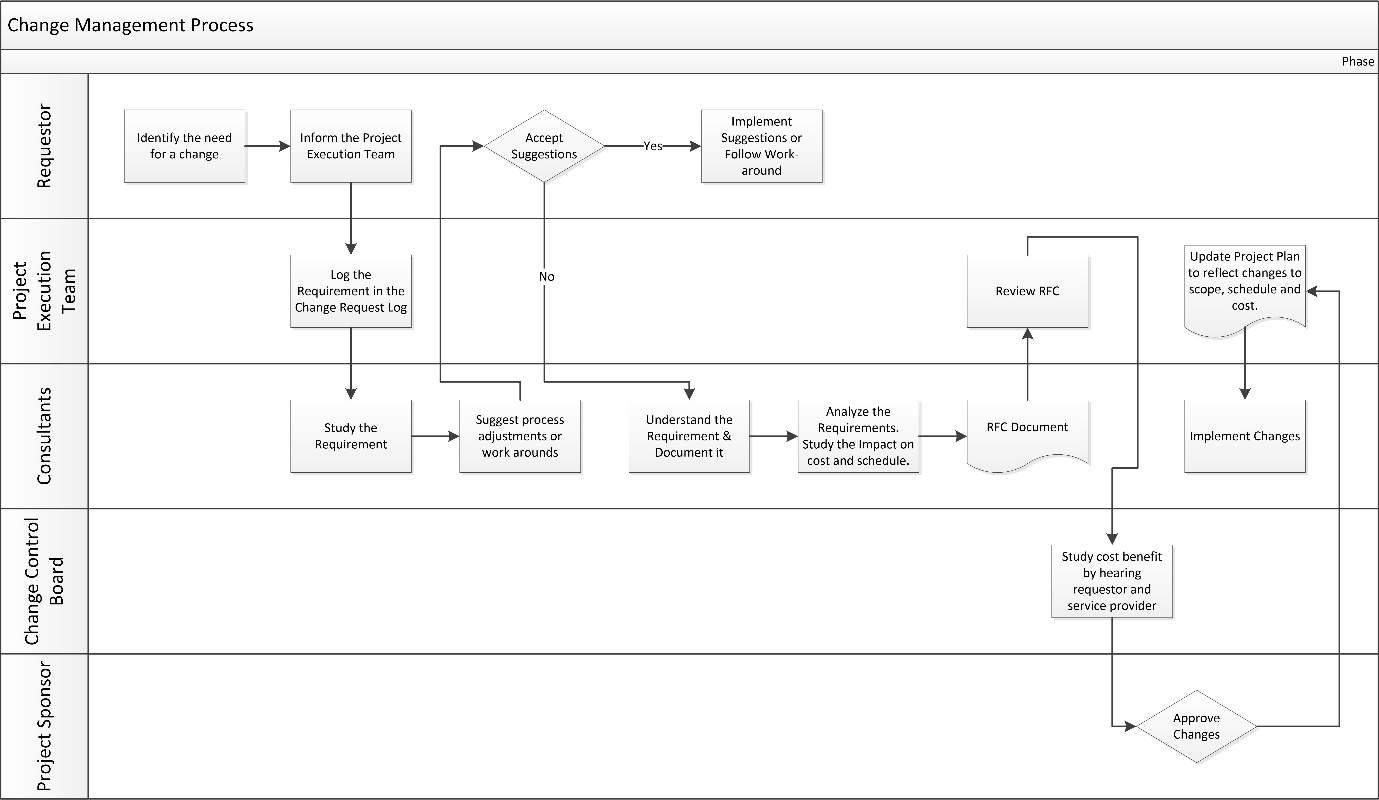
**Step 3:** Conduct an evaluation of the change (Program Manager). The project manager will discuss with the stakeholders, service providers and the project execution team to conduct an evaluation of the impact of the change to cost, risk, schedule, and scope. The consultant shall document the details in RFC document.

**Step 4:** Submit change request to Change Control Board (CCB) (Project Manager) he Change Control Board is chaired by the Project Sponsor and is constituted of the Program Manager, Project Manager, and representatives of the respective functions.

* **Chaired By:** Sri Amitasana Dasa (Project Sponsor)
* **Project Implementation Team:** Janaki Vallabha Dasa, Jaya Ganesh G
* **Service Provider:** Kalyan R V S (Project Manager - ITTI)
* **Functional:** Respective Function Head & the SPOC from Project Execution Team

**Step 5:** Change Control Board decision (CCB). The CCB will discuss the proposed change and decide whether or not it will be approved based on all submitted information.

**Step 6:** Implement change (Project Manager and Service Provider). If a change is approved by the CCB, the project manager will update and re-baseline project documentation as necessary as well as ensure any changes are communicated to the team and stakeholders.



## Acceptance of Deliverables

The **Key Users** are responsible for performing the User Acceptance Test to ensure that the product is configured to address all business requirements identified and signed off.

For each release cycle, one of the members from the **Project Execution Team** shall be nominated and be responsible for:

1. arranging face to face meeting of key users and service providers during requirements gathering
2. reviewing the functional requirements document (FRD) and recommending for sign-off
3. coordinating with the key users for UAT and ensuring that all the test cases pass
4. coordinating with the key users for conducting end user training
5. ensuring that the activities assigned to key users (master data collection, requirements review, testing, training to end users etc.) are completed on-time.

|  |  |  |  |
| --- | --- | --- | --- |
| **Release** | **Description** | **SPOC** | **Release Owner** |
| P1R1 | Accounts & Finance | Shrihari C Vaidyakar | Shyama Vallabha Dasa |
| P1R2 | Goloka Seva Trust | Jaya Ganesh G | Charu Krishna Dasa |
| P1R3 | Touchstone Foundation - Gifts | Ganesh M S | Ravi K R |
| P1R4 | ISKCON | Shrihari C Vaidyakar | Shyama Vallabha Dasa |
| P1R5 | Touchstone Foundation – Food | Ganesh M S | Kaivalyapati Dasa |
| P2R1 | QC Module & customizations | Jaya Ganesh G | Janaki Vallabha Dasa |
| P2R2 | System Integration | Janaki Vallabha Dasa | Janaki Vallabha Dasa |
| P2R3 | LS Retail\* |  |  |
| P2R4 | LS Hospitality\* |  |  |
| P2R5 | RTGS / NEFT Integration | Yuvaraj A | Shyama Vallabha Dasa |
| P3R1 | SRGST, SKBST, SGNST, SVST, SNST | Yuvaraj A | Shyama Vallabha Dasa |
| P3R2 | TSF General, SST, BBT | Ganesh M S | Ravi K R |
| P3R3 | NIVE / GBC / IF | Yuvaraj A | Shyama Vallabha Dasa |

The **Release Owner** identified for each release cycle shall be responsible for accepting and signing off the FRD and the final deliverables (after UAT). Based on feedback and input from the Project Manager and Stakeholders, the **Project Sponsor** is responsible for the acceptance of the final project deliverables and project scope.

# Project Schedule Management

## Major Milestones

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Release** | **Description** | **Start Date** | **End Date** | **Go Live** |
| P1R1 | Accounts & Finance | 01-Sep-15 | 9-Oct-15 | 01-Nov-15 |
| P1R2 | Goloka Seva Trust | 04-Oct-15 | 25-Nov-15 | 01-Dec-15 |
| P1R3 | Touchstone Foundation - Gifts | 02-Nov-15 | 10-Dec-15 | 01-Feb-16 |
| P1R4 | ISKCON | 11-Nov-15 | 23-Dec-15 | 01-Feb-16 |
| P1R5 | Touchstone Foundation – Food | 20-Nov-15 | 01-Feb-16 | 01-Feb-16 |
| P2R1 | QC Module & customizations | 14-Sep-15 | 20-Nov-15 |  |
| P2R2 | System Integration | 30-Nov-15 | 21-Dec-15 |  |
| P2R3 | LS Retail\* | TBD | TBD | TBD |
| P2R4 | LS Hospitality\* | TBD | TBD | TBD |
| P2R5 | RTGS / NEFT Integration | 04-Jan-16 | 25-Jan-16 |  |
| P3R1 | SRGST, SKBST, SGNST, SVST, SNST, HKMD | 02-Nov-15 | 01-Dec-15 | 15-Dec-15 |
| P3R2 | TSF General, SST, BBT | 01-Dec-15 | 18-Jan-16 | 01-Feb-16 |
| P3R3 | NIVE / GBC / IF | 01-Feb-16 | 28-Feb-16 | 01-Mar-16 |

*\*Implementation of these two releases (P2R3 and P2R4) is subject to finalization of LS Retail solution.*

This is the tentative schedule for the releases.

## Preparing the WBS

A detailed schedule and WBS shall be prepared at the beginning of each release cycle.

### Tool for preparing WBS

MS Project 2010

### Steps in preparing the WBS

* Identify all the required work products.
* Identify the steps or activities for generating the work product.
* Sequence the activities and identify the dependencies.
* Identify the resources required for each activity.
* Identify the time or duration for each activity.

Once the preliminary schedule is prepared, the same is discussed with project team and the resources assigned to the project tasks to get agreement. Once all the members agree to the proposed work products, duration and schedule, the schedule is baselined.

|  |  |
| --- | --- |
| Program Manager | Facilitate activities in preparing the WBS & baseline it on approval |
| Project Team | Participate in activities connected to preparing WBS for identifying work products, activities to produce the work products, sequencing the activities, identifying activity duration and activity resources. |
| Service Provider | Prepare the WBS using MS-Project 2010. |
| Project Execution Team | Review the schedule on a weekly basis.  Identify discrepancies and take corrective action. |

## Managing Schedule Changes

The schedule is reviewed on a weekly basis to identify any discrepancies and take corrective action. If there is any delay in delivering the work product as per the deadline, discuss the same in weekly review meeting and ensure that corrective actions are taken.

If there is a severe impact on the schedule, the same will be communicated to the Project Sponsor and the specific function head. With the consensus of the project sponsor and / or the function head, the schedule changes are effected and communicated to all the stakeholders.

**What are the factors that may impact the schedule / cost / deliverable?**

* Non-availability of the resources
* Scope Changes
* Customization Identified during requirements gathering
* Changes in the signed off requirements
* Data Readiness or any delay in providing validated data
* Delay in critical business decisions
* Delay in completion of the assigned tasks

Refer the risk register for possible mitigation plans.

# Project Cost Management

The Project Manager will be responsible for managing and reporting the project cost throughout the duration of the project. The project cost shall be booked under the specific project code created (PA003). The cost performance report is submitted on a monthly basis to the Program Manager and the Project Sponsor.

## Cost Baseline

### Budget Allocated

**Approved Budget:** INR 50,00,000.00 (exclusive of internal resource cost and time)

|  |  |
| --- | --- |
| ERP Implementation to Service Provider | **33,99,473.00** |
| Reserve amount of 10% for Reward | **3,39,947.00** |
| Applicable Taxes (Service Tax @ 14%) | **5,23,520.00** |
| Reserve amount for Customization (10% of implementation cost) | **3,39,947.00** |
| Applicable Taxes (Service Tax @ 14% and VAT 5%) | **1,65,408.00** |
| Operational Miscellaneous Cost | **50,000.00** |
| **Total Amount** | **48,18,295.00** |

### Assumptions

There are certain assumptions made in arriving at the above budget and the cost baseline.

* TSF shall procure the licenses for LS-Retail and LS-Hospitality. The license cost is not budgeted as part of this project; only the implementation cost is covered in the current project scope.
* We shall be configuring the manufacturing module for TSF - Foods and Krishnamrita (ISKCON).
* The cost of customizing the NAV features shall not be more than 5% of the total implementation cost.
* Any additional customization shall be approved by the Project Sponsor based on the business benefits & budget shall be allocated for the same.
* VAT is not applicable for the services extended by the service provider in putting the system to use. VAT is applicable only on customization.
* The functional resources will be allocated in each phase as per the schedule to give the requirements, to review the work products and to do the testing.
* We have considered the RTGS / NEFT integration for one bank only. If the bank consolidation does not happen, we may have to integrate more than one bank which will impact the cost.

# Project Quality Management

## Quality is Everyone’s Responsibility

### Service Provider

* Ensure that all the individual work products and the project deliverables meet the adequate level of quality requirements.
* Conduct document reviews to ensure correctness, completeness, content clarity & compliance. Conduct code reviews / walk through to ensure that the code is optimized.
* Conduct testing (functional testing, system testing, integration testing, load testing and regression testing) to ensure that the work product meets all the explicit and implicit requirements.
* Ensure that all the code changes made are traceable to the requirements.

### Program Manager

* Responsible for approving all quality standards.
* Responsible for signing off the work products and deliverables for quality.
* Work with the quality team of service provider to establish acceptable quality standards.
* Finalize the standard templates to be used for documents and records.

### Project Manager

* Responsible for quality management throughout the duration of the project.
* Review the work products and deliverables to ensure that the quality standards are met.
* Ensure all tasks, processes, and documentation are compliant with the plan.
* Communicate the quality standards to the project team members.

## Review Procedures

### Work Product Review

It is the responsibility of the service provider to ensure that the work products / documents (functional requirements, test case design, technical design etc.) are thoroughly reviewed to ensure the correctness, completeness, content clarity and compliance to the standards. The program manager is responsible for finalizing the documentation standards. The Program manager shall finalize the project templates in consultation with the service provider and baseline it for further use throughout the project.

### Code Review

TSF does not have the developer license for Microsoft Dynamics NAV. So it is the responsibility of the service provider to ensure that all the code developed are according to the Microsoft Standards.

The code shall be thoroughly reviewed

1. to ensure that the code is bug free
2. to ensure that all the requirements are addressed
3. to ensure that the changes made to the code are traceable to the requirements
4. to ensure that the code is optimized
5. to ensure that the coding standards are followed as per the Microsoft guidelines

## Testing

### Functional Testing

The service provider shall be responsible for ensuring that all the required business functionalities are configured in Microsoft Dynamics NAV 2013 R2. After the requirements sign off, the consultants shall develop the test case design document which identifies the test cases to test all the possible scenarios. Once the product is configured, the technical consultant nominated by the service provider shall run the test cases and generate a test case review report.

### Load and Stress Testing

It is expected that the service provider takes the required precautions to ensure that the application uses the server resources optimally. For all the custom developed features and integration of external systems that feed data into NAV or consume data from NAV, it is important to do the load testing and stress testing. Increase the load (data to be processed, number of connections possible etc.) and measure the time it takes for the system to process it. Note down any performance issues observed during such testing and address the same by optimizing the application or by increasing the server resources.

### Regression Testing

The service provider is responsible for conducting a regression testing to avoid any new bugs being introduced in existing features (functional or non-functional) as they deploy objects in the production environment during the go-live of further release cycles or to effect changes to the configuration for fixing a bug or any new enhancements to the system.

### User Acceptance Testing

The service provider shall ensure that the required testing is done internally to ensure a defect-free product delivered for user acceptance testing. It is expected that the features conform to the requirements and that all the test cases pass in the UAT.

## Verification and Validation

### Master Data

The SPOC from the respective functional departments are responsible for

1. Collecting the master data in the standard format (master data templates for NAV).
2. Validating the data to ensure correctness and completeness.
3. Ensuring that all the mandatory fields are filled with appropriate data.
4. Ensuring that any compliance issues identified are addressed and rectified. If the data does not comply with the standards suggested by NAV, migration is not possible.
5. Verify the data in NAV to ensure that migration is complete.

The functional consultant nominated by the service provider shall be responsible for

1. Verifying the data to ensure compliance.
2. Identifying discrepancies and communicating the same to the respective SPOC for correction
3. Migrating the validated data to ERP.

### Cut-off Data

The service provider shall be responsible for coordinating with the SPOC to get the cut-off data, validate it and update in NAV before go-live.

### User Training Manuals

The implementation team shall prepare the user training manuals. The service provider shall verify and validate all such manuals prepared and use the same for key user training.

## Templates

The Sure Step Methodology recommends the templates to be used for the NAV implementation. The logo and the styles will be customized to suit TSF / ISKCON documentation standards.

The following templates are customized and baselined.

* FRD: Functional Requirements Document (MS-Word)
* Gap Fit Analysis (MS-Excel)
* TDD: Technical Design Document (MS-Word)
* TCD: Test Case Design Document (MS-Excel)
* RFC: Request for Change (MS-Word)
* Issue Log (MS-Excel)
* Change Request Log (MS-Excel)
* Risk Register (MS-Excel)
* Traceability Matrix (MS-Excel)
* PSR: Project Status Report (MS-Excel)

If there is a need for using any other specific template, it shall be adopted with the fonts and styles according to TSF / ISKCON documentation standards.

## Traceability

The requirements documented in the FRD shall be numbered.

**Numbering format:** XXX-YYY-999

XXX stands for the trust code (ISK for ISKCON, TSG for Touchstone Foundation Gifts, TSF for Touchstone Foundation Food and GST for Goloka Seva Trust, GEN for General)

YYY stands for

* the function (FIN for Financial Management, PUR for Purchase, INV for Inventory and Stores, WHM for Warehouse Management, HRM for Human Resources, SLS for Sales and Marketing, JOB for Jobs, SER for Services and MFG for Manufacturing, ADM for Administration Modules)
* or the verticals (DMS for Donation Integration, KLM for Kalyana Mantapa, PAY for Payroll Integration, POS for POS integration, GHM for Guest House Integration)

999 is a running number series.

The technical design document shall refer the requirement number. The coding shall include the required internal documentation as per the NAV coding standards or the ITTI standards and shall be traceable to the requirement number. The object designer shall track the requirement number in the version list field so that we can track which requirement has impacted that particular object.

The service provider shall also maintain the traceability matrix to ensure proper correlation of the baselined requirements to the design documents and test case designs.

# Human Resource Management

## Roles and Responsibilities

### Project Sponsor: Amitasana Dasa

The project sponsor is the champion of the project and has authorized the project by signing the project charter. The project sponsor is responsible for the funding of the project and is ultimately responsible for its success.

### Program Manager: Janaki Vallabha Dasa (Janarthanan B)

The Program Manager oversees the project at the portfolio level and owns most of the resources assigned to the project. The Program Manager is responsible for overall program costs.

### Project Manager: Jaya Ganesh G

The Project Manager has overall responsibility for the execution of the project. The Project Manager manages day to day resources, provides project guidance and monitors and reports on the projects metrics as defined in the Project Management Plan. As the person responsible for the execution of the project, the Project Manager is the primary communicator for the project distributing information according to the Communications Management Plan.

### Key Stakeholders

Stakeholders includes all individuals and organizations who are impacted by the project. However, we define a subset of the stakeholders as Key Stakeholders. These are the stakeholders with whom we need to communicate with and are not included in the other roles defined in this section. The Key Stakeholders includes executive management with an interest in the project and key users identified for participation in the project. The list of key stakeholders and their contact details is recorded in the Stakeholders Register.

### Project Steering Team

The Project Steering Team includes management representing the departments / business units which make up the organization. The Project Steering Teamprovides strategic oversight for changes which impact the overall organization. The purpose of the Project Steering Team is to ensure that changes within the organization are effected in such a way that it benefits the organization as a whole.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Designation | Mobile | E-mail ID |
| Amitasana Dasa | Project Sponsor | 9590380380 | amitdas@iskconbangalore.org |
| Janaki Vallabha Dasa | Program Manager | 9342671724 | jnvd@hkm-group.org |
| Jaya Ganesh G | Manager - ERP | 7353760777 | jayaganesh.g@hkm-group.org |
| Ganesh M S | Process Owner | 8884949238 | ganesh.mavathur@hkm-group.org |
| Shyama Vallabha Dasa | Head – Finance | 9341958426 | smvd@hkm-group.org |
| Nandanandana Dasa | Head - HR | 9590008028 | nand@hkm-group.org |
| Prahladeesha Dasa | Head – Facilities | 9343939033 | phld@hkm-group.org |
| Mahaprabhu Gauranga Dasa | Head - Purchase | 9379684350 | mpgd@hkm-group.org |
| Charu Krishna Dasa | Business Head – GST | 9901670000 | crkd@hkm-group.org |
| Ravi K R | Business Head – TSG | 9341210290 | ravi.kr@hkm-group.org |
| Kaivalyapati Dasa | Business Head – TSF | 9342673176 | kvpd@hkm-group.org |

### Project Execution Team

The Project Execution Team is comprised of people who are working on the project. The project execution team needs to have a clear understanding of the work to be completed and the framework in which the project is to be executed. Since the Project Execution Team is responsible for completing the work for the project they played a key role in creating the Project Plan including defining its schedule and work packages. The Project Execution Team requires a detailed level of communications which is achieved through day to day interactions, daily wrap-up meetings & weekly review meetings.

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Execution Team** | | | |
| Name | Designation | Mobile | E-mail ID |
| Janaki Vallabha Dasa | Program Manager | 9342671724 | jnvd@hkm-group.org |
| Jaya Ganesh G | Manager - ERP | 7353760777 | jayaganesh.g@hkm-group.org |
| Ganesh M S | Process Owner | 8884949238 | ganesh.ms@hkm-group.org |
| Ayyappa Dasika | IT Infrastructure | 9342312504 | ayyappa.dasika@hkm-group.org |
| Shyama Vallabha Dasa | Head – Finance | 9341958426 | smvd@hkm-group.org |
| Shrihari C Vaidyakar | Audit & MIS | 9449528141 | shrihari.cv@hkm-group.org |
| Yuvaraj A | Sr. Finance Executive | 9342928017 | yuvaraj.a@hkm-group.org |

### Service Provider: ITTI Pvt. Ltd.

The service provider is responsible for executing the project according to the scope. The consultants deployed by the service provider are responsible for:

* gathering the business requirements (functional and non-functional),
* conducting a gap-fit analysis & suggesting process-changes or work around
* configuring the product according to the business requirement,
* customizing the product for additional features (on approval)
* testing the product to ensure that all the requirements are addressed,
* migrating the master data and cut-off data,
* training the key-users and facilitating the usage of the product (a smooth go-live)
* training the internal team to configure additional trusts & in handling L1, L2 support

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Designation | Mobile | E-mail ID |
| Ravi Chander L | Program Manager | 9844093485 | ravi@itti.com |
| Kalyan R V S | Project Manager | 9342673469 | kalyan.rvs@itti.com |
| Dilraj Fernandes | Functional Consultant | 9964244516 | dilraj.f@itti.com |
| Sasidhar M V | Project Manager | 9886289823 | sasidhar.mv@itti.com |
| Kavya Upadhyaya | Functional Consultant | 9743157342 | kavya.upadhyaya@itti.com |
| Anitha Jothi | Technical Lead | 9632202562 | anitha.jothi@itti.com |
| Ravi Kishore R | Senior Technical Consultant | 9538588335 | ravi.kishore@itti.com |
| Srinivas Rao Patel | Technical Consultant | 7738015744 | srinivasrao.patil@itti.com |

# Communications Management

## Meetings

### Project Initiation Meeting

|  |  |
| --- | --- |
| Objective | To formally initiate the project.  To communicate the project objectives and management approach. |
| Medium | Face-to-face |
| Frequency | Once (September 1, 2015) |
| Audience | Project Sponsor, Project Steering Team, Project Execution Team |
| Co-Ordinator | Project Sponsor (Amitasana Dasa) |
| Deliverable | Kick-off Meeting Presentation (PDF file circulated) & Minutes |

### Project Execution Team Meeting

|  |  |
| --- | --- |
| Objective | To wrap-up and summarize the day’s activities.  To plan the agenda and action items for the next working day. |
| Medium | Face-to-face |
| Frequency | Daily (Monday to Friday) 5:45 PM to 6:15 PM |
| Audience | Project Execution Team & Representatives of Service Provider Organization |
| Coordinator | Project Manager (Jaya Ganesh G) |
| Deliverable | Updates to Action Item Register / Issue Log |

### Project Steering Team Meeting

|  |  |
| --- | --- |
| Objective | To give a status update to the project steering team.  To expedite high level business decisions.  To resolve issues connected to scope, schedule, resources etc. |
| Medium | Face-to-face |
| Frequency | Fortnightly (preferably on 1st and 3rd Wednesday) 10:30 am to 11:30 am |
| Audience | Project Steering Team & Representatives of Service Provider Organization |
| Coordinator | Project Manager (Jaya Ganesh G) |
| Deliverable | Project Status Presentation & Minutes of Meeting |

### Weekly Project Review Meeting

|  |  |
| --- | --- |
| Objective | To study the health of the project & take corrective / preventive action.  To revise the plans (if required) for smoothening the execution. |
| Medium | Face-to-face |
| Frequency | Weekly (every Friday) 10:30 am to 11:30 am |
| Audience | Project Execution Team, Service Providers |
| Coordinator | Project Manager (Jaya Ganesh G) |
| Deliverable | Project Status Report |

### Ad-hoc Meetings

* The Meeting Coordinator will distribute a meeting agenda at least 2 days prior to the meeting.
* The participants are expected to review the agenda prior to the meeting.
* The timekeeper shall ensure that the group adheres to the times stated in the agenda.
* The recorder will take all notes for distribution to the team upon completion of the meeting.
* It is imperative that all participants arrive to each meeting on time.
* Cell phones shall be turned off or set to vibrate mode to minimize distractions.
* Meeting minutes shall be distributed no later than 24 hours after each meeting is completed.

### Other Form of Communications

The Project Manager and Program Manager shall be included on any **email** pertaining to the Project. All the issues or concerns arising out of **informal communication** between the team members shall be communicated to the project manager and program manager for updating in the appropriate log so that the issue can be tracked to closure.

# Risk Management

Risk is an uncertain event or condition that, if it occurs, has a positive or negative effect on the projects objectives.

The Project Execution Team shall be responsible for

1. proactively identifying all potential risks (positive or negative)
2. study the impact of the potential risks on the project scope, schedule, cost or quality
3. classify the risk and rank them based on the probability of occurrence and the impact
4. planning the risk responses to avoid the risk or transfer the risk or mitigate the risk

The risks are documented in the Risk Register. The risks are assigned to the team members to take the required action and the status is reviewed in the weekly status review meeting.

|  |  |
| --- | --- |
| Risk ID | A unique risk id. Format: RISK-ERP-999 (999 indicates serial number) |
| Risk Name | Give a descriptive name for the risk. |
| Risk Description | The risk stated in a complete sentence which states the cause of the risk, the risk, and the effect that the risk causes to the project. |
| Risk Source | Business / Operation / People / Finance |
| Impact Description | Briefly describe the impact of the risk. |
| Impact on Scope | What is the impact of the risk on the scope of the project? |
| Impact on Time | What is the impact of the risk on the schedule of the project? |
| Impact on Quality | What is the impact of the risk on the quality of the project? |
| Impact on Effort | What is the impact of the risk on the effort of the project? |
| Impact | The impact of the risk on the project if the risk occurs. (in a scale of 0 - 10) |
| Probability | The likelihood that a risk or opportunity will occur. (in a scale of 0 - 10) |
| Risk Score | Impact multiplied by Probability |
| Risk Ranking | A priority list which is determined by the relative ranking of the risks within the project with the number one being the highest risk score. |
| Risk Response | The action which is to be taken if this risk occurs.  Avoid the Risk | Transfer the Risk | Mitigate the Risk | Accept the Risk |
| Identified By | The person who identified the risk. |
| Identified On | The date on which the risk was identified. |
| Risk Owner | The person who the project manager assigns to watch for triggers, and manage the risk response if the risk occurs. |
| Status | Update the status of the risk. |
| Last Updated On | Risk register is a live document and the date on which the risk was last updated need to be tracked. |

# Procurement / Vendor Management

The Program Manager shall be responsible for managing the procurement activities connected to this project. **This project requires minimal or no procurement**. In the event procurement is required, Project manager and / or Program Manager shall be responsible for

1. identifying the items or services to be procured
2. presenting the need to the project execution team
3. identifying the vendors, inviting quotes and selecting the vendor
4. ensure that the contract is vetted with the legal team
5. ensuring that the organizational procurement processes are followed

It is recommended that for any product or service that is not unique, try to contact at least three vendors who supply the item or provide the service.

In case of **product finalization**: (a) Ensure that the features of the product are adequate for our requirements. (b) Ensure that it is technically feasible to use the product. (c) Ensure that the integration requirements with ERP, if any, shall be met.

In case of **services**, (a) identify the parameters that are critical to success of the engagement (b) ensure that the expectations are set with the vendor on each of these parameters.

Get at least 3 **customer references** where the similar item is supplied or similar services were provided by the vendor. To ensure an apple-to-apple comparison, the customer organization shall be of similar nature. Talk to the customer representative and get their feedback. Understand the challenges they faced with respect to the product or services.

## Key Result Areas

For each release cycle the key results area will be documented in the standard KRA format and shared with the service provider in the beginning of the release cycle.

### Resource Deployment (Weightage: 15%)

The service provider shall ensure that the resources deployed are **competent** enough and have the required **experience** to handle the project. The consultants are expected to provide the required **consultancy** to handle various business scenarios. The resources shall be **available** as per the schedule. In case, the resources are not available, the service provider shall still ensure that there is **no impact on the schedule and cost** of the project due to such unavailability of resources.

### Training to Internal Team (Weightage: 15%)

The service provider shall be responsible for training the internal resources on

* configuring additional companies / trusts in MS-Dynamics NAV 2013 R2
* Data Migration Activities (master data migration)
* L1 and L2 support & basic troubleshooting (share common scenarios and solutions).
* Role Center Configuration and setting up the role center.
* Voucher & report configuration (report generation / minor changes to existing reports)
* IT administration / interfaces and device configuration (printer / cheque configuration)
* handholding internal team for configuring additional companies / trusts

### On-time Delivery of Quality Output (Weightage: 15%)

The service provider shall be responsible for

* ensuring that the dependencies are identified
* the resource requirements (plan & schedule) are conveyed in advance
* the deliverables are submitted on-time in mutually agreed format
  + functional requirements document
  + gap-fit analysis
  + technical design documents
  + test case design and test reports
* the work products shall meet the quality requirements (correctness, completeness, clarity of content and compliance to standards)
* the end product shall be released on-time
* In case of any delay in the schedule, the consultants shall inform well-in-advance and mutually agree on the revised time line to avoid idle time for the organizational resources.

### Requirements Management (Weightage: 15%)

All the functional requirements shall be identified and documented (FRD) along with the gap-fit analysis report. In case of gaps, the consultants shall suggest industry standard practices or work around to avoid customization. If the work around or process changes are not acceptable to the business users / stakeholders, the consultants shall suggest the customization and provide a detailed impact report. The service provider shall ensure that the product is configured and / or customized to meet all the business requirements signed off and ensure that all the queries of key users are addressed to their satisfaction.

### Functional Consultancy (Weightage: 40%)

The functional consultancy requirements shall be identified for each release cycle and will carry a weightage of 40%. This will be shared along with the purchase order for the respective release cycle.



## Performance Evaluation

At the end of each release cycle, the performance on KRA is evaluated by the Project Sponsor in consultation with the Program Manager, Project Manager, the Release Owner and representatives of the Service Provider organization.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Designation | Mobile | E-mail ID |
| Amitasana Dasa | Project Sponsor | 9590380380 | amitdas@iskconbangalore.org |
| Janaki Vallabha Dasa | Program Manager | 9342671724 | jnvd@hkm-group.org |
| Jaya Ganesh G | Manager - ERP | 7353760777 | jayaganesh.g@hkm-group.org |
| Release Owner | as identified in section 2.4 | | |
| Ravi Chander L | Program Manager - ITTI | 9844093485 | ravi@itti.com |
| Kalyan R V S | Project Manager - ITTI | 9342673469 | kalyan.rvs@itti.com |

The KRA scores are assigned in a scale of 1-5.

* > 4 and <= 5: Exceeds Expectations (EE) a reward of up to 10%
* >= 3 and <= 4: Meets Expectations (ME) a penalty of up to 10%
* > 2 and < 3: Partially Meets Expectations (BE) a penalty of up to 75%
* <= 2:Did not meet Expectations (NE) a penalty of 75%

The reward or penalty shall be computed based on the KRA score as follows:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **EE** | | **ME** | | **BE** | | **NE** |
| 4.91 - 5.00 | 110.0% | 3.91 - 4.00 | 100.0% | 2.91 - 3.00 | 90.0% | 75% |
| 4.81 - 4.90 | 109.0% | 3.81 - 3.90 | 99.0% | 2.81 - 2.90 | 88.5% |
| 4.71 - 4.80 | 108.0% | 3.71 - 3.80 | 98.0% | 2.71 - 2.80 | 87.0% |
| 4.61 - 4.70 | 107.0% | 3.61 - 3.70 | 97.0% | 2.61 - 2.70 | 86.5% |
| 4.51 - 4.60 | 106.0% | 3.51 - 3.60 | 96.0% | 2.51 - 2.60 | 85.0% |
| 4.41 - 4.50 | 105.0% | 3.41 - 3.50 | 95.0% | 2.41 - 2.50 | 83.5% |
| 4.31 - 4.40 | 104.0% | 3.31 - 3.40 | 94.0% | 2.31 - 2.40 | 81.0% |
| 4.21 - 4.30 | 103.0% | 3.21 - 3.30 | 93.0% | 2.21 - 2.30 | 79.5% |
| 4.11 - 4.20 | 102.0% | 3.11 - 3.20 | 92.0% | 2.11 - 2.20 | 78.0% |
| 4.01 - 4.10 | 101.0% | 3.01 - 3.10 | 91.0% | 2.01 - 2.10 | 76.5% |