1. Executive Summary

I want to thank the executives at FPD Beverage Company for the opportunity to work on the FPD Drinking Metrics (FPD DM). A special thank you to Paul Reporting, who was the project sponsor. The goal of this project was to build a dashboard that would help provide better customer support and stay competitive with our competition. We have received feedback from a few of our clients, pointing out some inadequacies in our channel that need attention.

Some issues are:

- Production in the domestic coffee plant is sporadic.
- The vessel shipments from international organic tea are unpredictable.
- Marketing and sales are unable to make valid sales predictions.
- Large clients are threatening to leave for low servicing.

FPD currently generates $350 million in revenue annually from its three product lines. With tighter controls on our distributions, we will be able to bring down costs and increase efficiencies. The dashboard will also allow us to know when there are issues, and we can react to them quickly. In the first year, we think we can make an additional 10 to 25 million in cost savings. Over time it will help us become the number one supplier to our clients.

To start off building the dashboard, we will look at the current ERP system and all the requests that have been made for it. From that, we will see what types of statistics and analysis we can get. Using that information, we can start to build a mock-up of the dashboard.

The dashboard should provide in-depth, real-time information for sales and operations consisting of:

- Product Line sales analysis
- Packaging performance by product line analysis
- Product Line by Customer analysis
- Order delivery performance by product line and customer
- Distribution center shipping performance to customer

The dashboard should also be user friendly and available 24/7. Marketing, sales, and others should be able to access the information from anywhere using an iPhone, tablet, computer, or laptop. Additionally, the data needs to be secure since we do not want our competitors to get the information. We will also use AI to help with predicting and customer retention. We will be using Qlik to accomplish this.

For this project plan, a month will be equal to four weeks. A week will consist of five, eight hour days. The project will not go beyond the 6-month target and will not exceed $250,00. The costs are estimated to come in under $200k at $193,233. The initial time frame was initially 100 days. We can combine a few of the steps to get the days down to 80 days. With the critical path of A, B, D, E, F, G, H, J. To help us get the estimates, we used past data for similar projects and imputed them as constraints into excel and ran the analytical solver. We optimized the total costs to be at its lowest.

The Project scope statement is first since it will be touching on the main points of the project, including the milestones, deliverables, technical requirements, etc.

Next, we will show the priority matrix that helped us in deciding where we should focus. This portion contains a chart with a description.

After the priority matrix, the Work Breakdown Structure (WBS) is included. The WBS will show the project broken down into smaller parts along with the costs and the estimated durations for each piece.

Then the communications plan will follow the WBS. The communications plan will be how we will be keeping everyone informed and how they should expect to receive the information.

We will discuss the Activity on Node (AON) diagram, which gives a graphical representation of the project flow.

Then we will show a Project NBaseline Budget that should help is with the cost estimations and if we are still going to complete the project on time.

The Gantt Chart will follow that is chart layed out like calendar and broken up by the separate projects. It will also mark the milestones showing when they should be completed.

A summary of the risks will then follow the Gantt chart, which will also include a few charts and graphs with descriptions.

Then we show the current organizational structure and the people that are involved.

2. Project Scope Statement
    2.1. Project Objective – To design and implement a customer-centric dashboard that can be utilized by all team members to help us compete. The project will be completed within six months with costs under $250,000
    2.2. Project Name and Acronym – FPD Drinking Metrics (FPD DM)
    2.3. Project Deliverables - A dashboard that will deliver essential information to support decision making. Such as
        2.3.1.Product Line sales analysis,
        2.3.2.Packaging performance by product line analysis,
        2.3.3. Product Line by Customer analysis,
        2.3.4.Order delivery performance by product line and customer,
        2.3.5.Distribution center shipping performance to the customer.
        2.3.6.AI capabilities for forecasting.
    2.4. Project Milestones –
        2.4.1.Completion of dashboard design – 4 Weeks
        2.4.2.Completion of analytic models – 6 Weeks
        2.4.3.Dashboard testing - 8 Weeks
    2.5. Technical Requirements – The dashboard will be developed and used with Qlik. They provide an easy to use interface that can be customizable. It will be available for use on all platforms 24/7, with updates happening every 3 seconds during working hours.
    2.6. Limits and exclusions - The Dashboard will be monitored and fixed by FPD, but Qlik will be called on to help with any significant problems or updates. If running, the AI becomes too much of a drain in our current environment with Qlik. We will have to upgrade our technology with them.

2.7. Client Review – This will be reviewed by CEO/Barbara Coffee, CFO, and project Sponsor Paul Reporting and the rest of the EOC.

3. Priority Matrix

3.1. Since we are not currently meeting our client needs, we may lose some of them. Due to the impact, this will have Cost is accept even if it goes over. Since there is an urgency to get this established, we have included time in the Enhance box. The performance is marked as a Constrain since this needs to be completed on time but not at the loss of performance.

	Time	Performance	Cost
Constrain			
Enhance			
Accept			

4. The WBS

WBS ID	Task Description
1.0	Project FPD BM
1.1	Define Requirements
1.1.1	Conduct QlikSense AI tool Training
1.1.2	Define/agree on Analytics calculatio
1.2	Design Dashboard
1.3	Source/Cleanse data
1.4	Develop analytics models
1.5	Construct/Modify dashboard
1.6	Test dashboard
1.7	Train Users
1.8	Deploy Dashboard
1.9	Project Manager

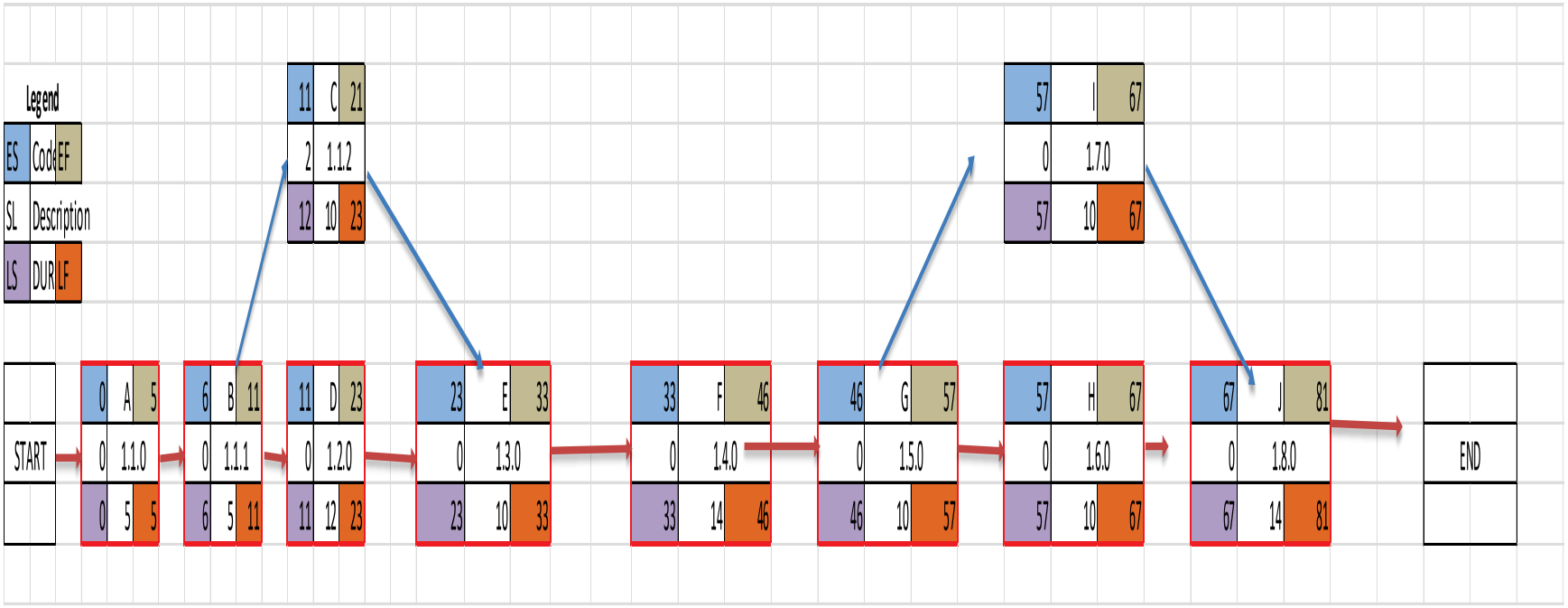
5. Communicaion plan

What Information	Target Audience	When?	Method of communication	Provider
Milestone Report	EOC & PM	Monthly	Email	PM
Project Status Report	All	Weekly	Email	PM
Team Status Reports	EOC	Monthly	Email	PM
Issues Report	Staff	Weekly	Email	PM
Escalations Reports	Staff	When needed	Email	PM
Outsourcing performance	Staff	Monthly	Email	PM
Accepted Change Requests	Staff	When needed	Email	EOC
Oversight decisions	EOC	As needed	Email	PM

6 AON Diagram

First start with the table. The reitcal path is in red

WBS		Name	Duration	ES	EF	LS	LF	Slack
1.1.0	A	Define Requirements	5	0	5	0	5	0
1.1.1	B	Conduct QlikSense AI tool Trainin	5	6	11	6	11	0
1.1.2	C	Define/agree on Analytics calculat	10	11	21	12	23	2
1.2.0	D	Design Dashboard	12	11	23	11	23	0
1.3.0	E	Source/Cleanse data	10	23	33	23	33	0
1.4.0	F	Develop analytics models	14	33	46	33	46	0
1.5.0	G	Construct/Modify dashboard	10	46	57	46	57	0
1.6.0	H	Test dashboard	10	57	67	57	67	0
1.7.0	I	Train Users	10	57	67	57	67	0
1.8.0	J	Deploy Dashboard	14	67	81	67	81	0
CP		A, B, D, E, F, G, H, J						
CP		Duration	80					


Legend
ES Code EF
SL Description
LS DUR LF
START
0 A 5
0 1.1.0
0 5 5
6 B 11
0 1.1.1
6 5 11
11 C 21
2 1.1.2
12 10 23
11 D 23
0 1.2.0
11 12 23
23 E 33
0 1.3.0
23 10 33
33 F 46
0 1.4.0
33 14 46
46 G 57
0 1.5.0
46 10 57
57 H 67
0 1.6.0
57 10 67
57 I 67
0 1.7.0
57 10 67
67 J 81
0 1.8.0
67 14 81
END

ID	Days	PV	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
A	5	8,578	1,901	1,901	1,901	1,901	1,901																	
B	5	30,000						6,000	6,000	6,000	6,000	6,000												
C	10	16,121											1,574	1,574	1,574	1,574	1,574	1,574	1,574	1,574	1,574	1,574		
D	12	17,767											1,462	1,462	1,462	1,462	1,462	1,462	1,462	1,462	1,462	1,462	1,462	1,462
E	10	16,055																						
F	14	20,510																						
G	10	16,054																						
H	10	16,051																						
I	10	16,005																						
J	14	20,079																						
PM	81	16,013	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198
		PV	2,098	2,099	2,099	2,099	2,099	6,198	6,198	6,198	6,198	6,198	3,235	3,235	3,235	3,235	3,235	3,235	3,235	3,235	3,235	3,235	1,660	1,660
Cumulati		PV/BAC	2,098	4,197	6,296	8,395	10,494	16,692	22,890	29,088	35,286	41,484	44,718	47,953	51,188	54,422	57,657	60,891	64,126	67,361	70,595	73,830	75,490	77,150

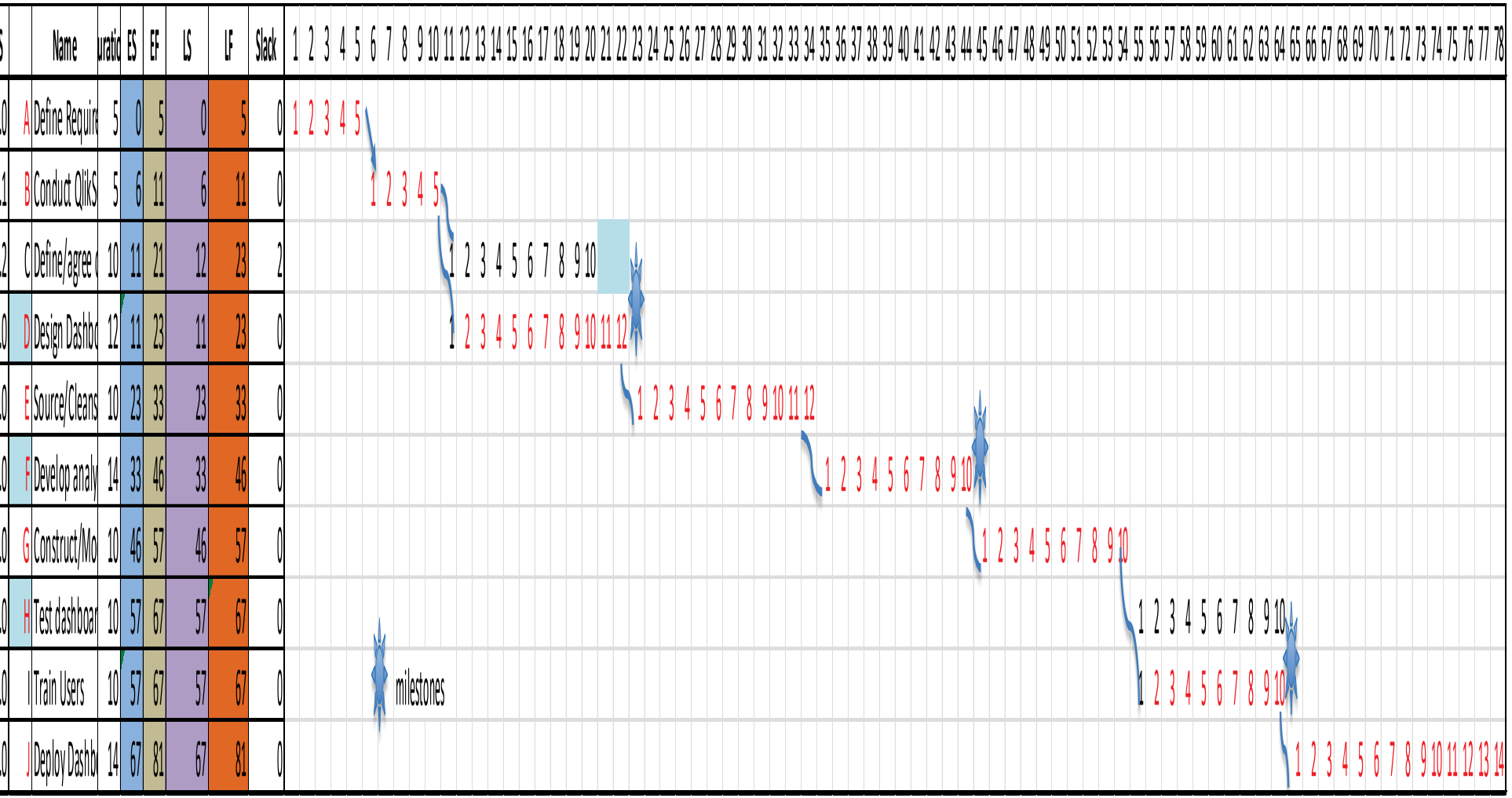
Slack

23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46
1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586														
										1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502	1,502
198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198
1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,700
78,934	80,718	82,501	84,285	86,069	87,852	89,636	91,420	93,203	94,987	96,687	98,388	100,088	101,789	103,489	105,189	106,890	108,590	110,291	111,991	113,692	115,392	117,092	118,793

47	48	49	50	51	52	53	54	55	56
1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586	1,586
198	198	198	198	198	198	198	198	198	198
1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784	1,784
120,576	122,360	124,143	125,927	127,710	129,494	131,278	133,061	134,845	136,628

57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585														
1,581	1,581	1,581	1,581	1,581	1,581	1,581	1,581	1,581	1,581														
										1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440
198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198	198
3,364	3,364	3,364	3,364	3,364	3,364	3,364	3,364	3,364	3,364	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638
139,992	143,356	146,720	150,084	153,447	156,811	160,175	163,539	166,903	170,267	171,905	173,543	175,181	176,819	178,457	180,095	181,733	183,371	185,009	186,647	188,285	189,923	191,561	193,199

6. Gantt Chart with Milestones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B Conduct QlikS 5 6 11 6 11 0
C Define/agree 10 11 21 12 23 2
D Design Dashbo 12 11 23 11 23 0
E Source/Cleans 10 23 33 23 33 0
F Develop analy 14 33 46 33 46 0
G Construct/Mo 10 46 57 46 57 0
H Test dashboar 10 57 67 57 67 0
I Train Users 10 57 67 57 67 0
J Deploy Dashb 14 67 81 67 81 0
milestones

8 Risk

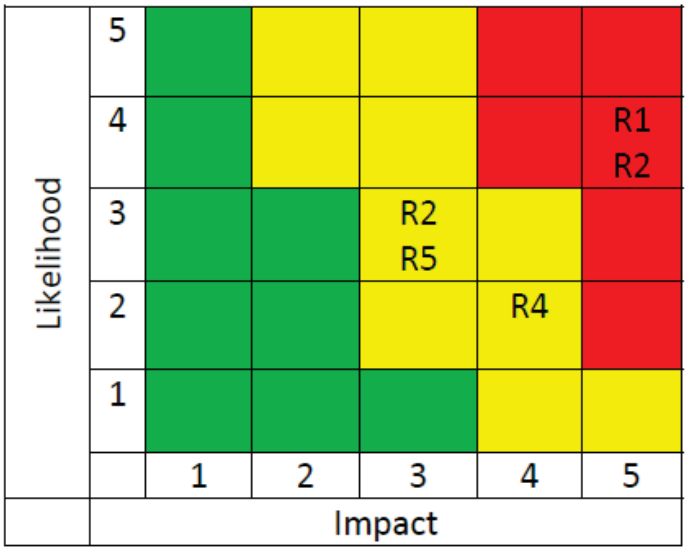
Potential Risks

- Risk 1 (R1) – Receiving unclean data with low data integrity and missing elements
- Risk 2 (R2) – Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience
- Risk 3 (R3) – Define/socialize/accept performance metrics (how to calculate)
- Risk 4 (R4) – Security assessment finding a major issue that is harder to fix than expected
- Risk 5 (R5) – Team does not get up to speed on new AI technology causing a delay in development

RAM – Risk Assessment Matrix

Risk Event	Likelihood	Impact	Detection Difficulty	When
Receiving unclean data with low data integrity and missing elements (R1)	4	5	3	Conversion
Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience (R2)	3	3	3	Resource Planning
Define/socialize/accept performance metrics (how to calculate) (R3)	4	5	3	Communication
Security assessment finding a major issue that is harder to fix than expected (R4)	2	4	5	Security Planning
Team does not get up to speed on new AI technology causing a delay in development (R5)	3	3	3	Training

RSM Risk Severity Matrix



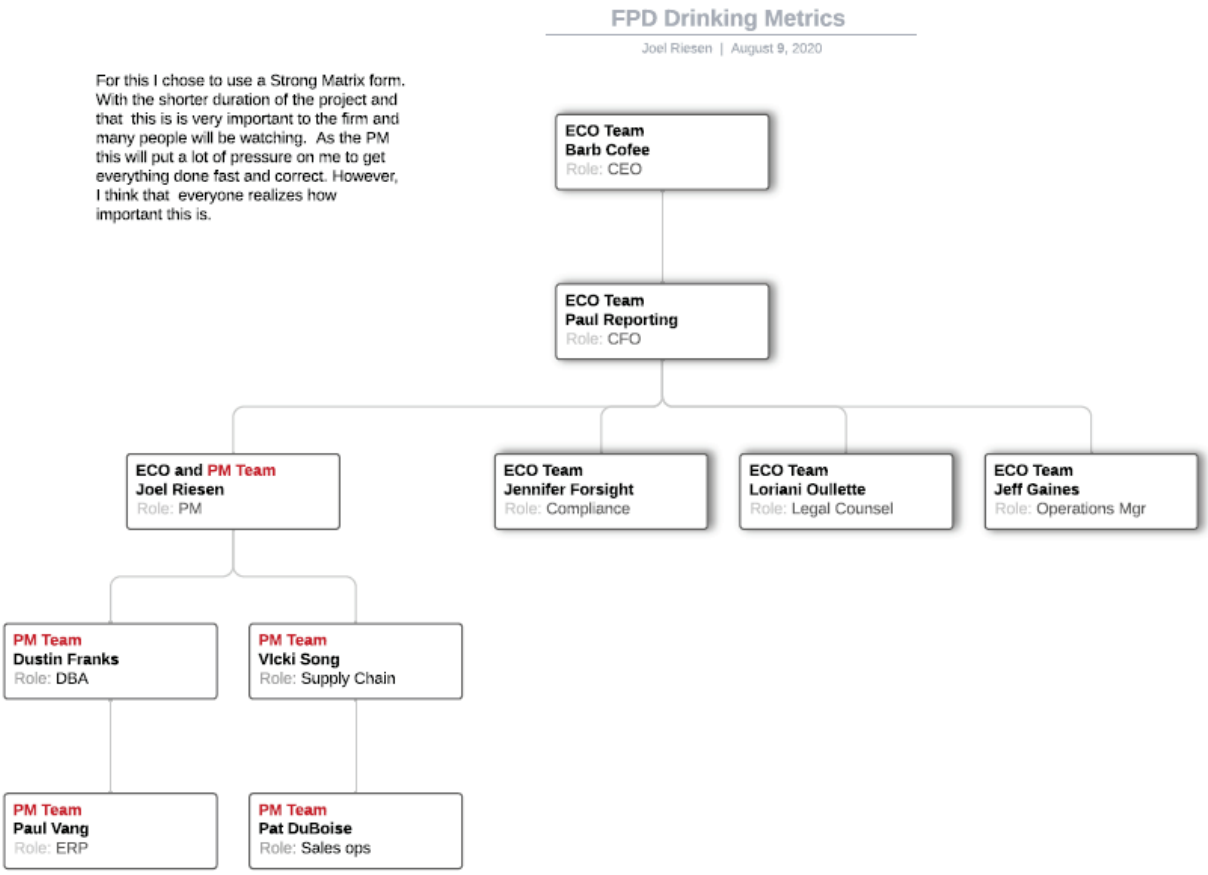
RSM - Assess the project riskiness

Based on the risk assessment I would categorize this project as having high impact risks with a moderate change of happening. This can be seen by averaging all the risks which shows a likelihood of 3.2 which is moderate and an impact of 4 which is high moderate. This plots into the yellow on the risk severity matrix but is closer to high than low which is why the risk would be higher than average.

RRM – Construct Risk Response Matrix

Risk Event	Response	Contingency Plan	Trigger	Responsible Party
Receiving unclean data with low data integrity and missing elements (R1)	Mitigate: Complete early in the project to have time to identify and fix	Implement with bad data while it is being mitigated.	Data validation fails	Database Analyst
Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience (R2)	Avoid: Prioritize project to ensure enough resources	Engage resources more heavily than expected.	20% increase in weekly hours requirement	Project Manager
Define/socialize/accept performance metrics (how to calculate) (R3)	Mitigate: Manage during testing	Heavy focus on scope definition and validation	Additional scope requested	Sales Operations Analyst
Security assessment finding a major issue that is harder to fix than expected (R4)	Mitigate: Complete assessment early to have time to manage.	Willing to pay what is needed for the solution.	Result of security assessment	IT Manager
Team does not get up to speed on new AI	Mitigate: Training and certification	Ensure everyone takes training and is competent	Project team member does	Project Manager

9 Org Chart



Feasibility and risks to project execution success

- The major risk associated with these projects have already been overcome
- The team are experts in the field and have extensive experience with the QlikSense platform and its inner workings
- The dashboard and analytics platform **must** be pushed by leadership and other managers to break into the existing processes and culture