**Project Planning Initiative:**

**Online Customer Ordering System Implementation**

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Project Overview

As a Systems Analyst, I've been entrusted with the initiation of the project planning process for the introduction of a new online customer ordering system for Hullabaloo Party Supplies (HPS). In this stage, our focus is creating practicality and feasibility assessments. I present this proposal as the Project Charter, offering insights into what to anticipate, the project's intended outcomes, and an outline of key components.

Within this framework, we will explore the project's purpose, the problem statement, its goals and objectives, key assumptions, the involved stakeholders, a high-level WBS for requirements gathering, and potential risks. I’ll also address your aspirations and requirements while thoroughly examining the project's potential outcomes. (Valacich & George, 2020).

Let's address the problem statement: Hullabaloo Party Supplies (HPS) has traditionally operated by selling to third-party vendors exclusively. However, as you pivot toward serving the general public, the existing system will not suffice. As customers choose your party supply products, a new system must guide them through the purchase process until completion. Your solution is the adoption of a dedicated system that supports e-commerce and streamlined shipping services (Holub, 2019).

Purpose, Goals and Objectives

Your purpose, like that of this project, is to embrace a new ordering system that can successfully serve your new clientele. It's crucial to proactively create opportunities for expanding your customer base. This system should provide usability, ensuring seamless customer interactions. Upholding a high standard of customer service is your company's reputation and mission. Both you and your stakeholders have recognized the benefits of broadening your clientele, urging the origination of this project analysis. The ultimate objective of this analysis, and for your business, is to facilitate a smooth and successful transition into this new frontier. (Valacich & George, 2020)

Key Assumptions

Let’s explore the Key Assumptions we can establish regarding the software that would be most compatible with your company. These assumptions may evolve as we continue collaborating.

1. By outsourcing, the system will be externally developed and tailored as Custom Software. Given your current size and achievements, the ROI (Return on Investment) will surpass purchase expenses.
2. This system will be web-based, ensuring broad accessibility for the general public, as well as for your internal use.
3. Any applicable data will have integration capability.
4. Security measures will be robust enough to not only protect customer data but also against breaches and unauthorized access (Valacich & George, 2020).
5. We can agree that the system must be compatible with various devices and operating systems to accommodate customers who access it from different platforms.
6. The system will incorporate order tracking features, granting customers a status overview of the location of their orders (Stair & Reynolds, 2018).
7. The system will seamlessly integrate with secure payment services, providing customers with multiple payment options while ensuring the security. The design of the system will facilitate scalability as your customer base and order volume expand, ensuring long-term sustainability and performance.
8. The system will offer swift and efficient order processing, bypassing delays in product (ProcureDesk, 2021).

Above are a few ideas that come to mind when creating deliverables. A comprehensive list will be clearly defined through further communication among your company members. I opportunely anticipate planning and coordinating team meetings to collectively advance your business model.

Stakeholders and Responsibilities

Stakeholders are your people who have a key interest in the development of this system. The following will include the system’s users as well as managers, customers, stockholders, vendors, ect (Valacich & George, 2020). Below is a list of your esteemed stakeholders, outlining the importance of our teamwork system. The upcoming project will impact each of us to varying degrees. It is crucial to consider each individual’s/team’s perspective, level of influence, roles, and engagement in this development.

1. Owners: Invested capital or equity within the business.

2. Investors: Provide capital to the business.

3. Regulators: Ensure business compliance with laws and regulations.

4. CEO: Responsible for overall management of the company.

5. VP: Manage specific areas of the company.

6. Project Manager (myself): Plan, execute, and close projects within the company.

7. Training Subcontractor: Provide training services to employees of the company.

8. Marketing: Promote the company’s products or services to customers.

9. Manager Supervisor: Oversee employees and ensure they meet their goals and objectives.

10. IT Management: Manage the company’s information technology systems and infrastructure.

11. Internal IT Staff: Provide technical support to employees within the company.

12. Purchasing Unit Manager: Supports the Purchasing unit. (Valacich & George 2020)

13. Human Resources: Manage employee relations, recruit new employees, and ensure staff opportunities of trainings and development. (Fernando, 2023) (Valacich & George 2020)

14. Suppliers: The companies producing your product. (ActiveCampaign, 2021)

15. Customers: The population for which the system is serving. Our goal is to give them a user-friendly experience facilitating purchases.

As we progress in this process, each stakeholder will have the opportunity to provide input and/or contribute to the tasks, collectively shaping the project

High-Level WBS for Requirements Gathering

During the recent Steering Committee meeting, the project's requirements and task outlines were discussed. Your high-level stakeholders have clear expectations for the new system. We conducted requirements gathering, and we touched upon the concept of the Work Breakdown Structure (WBS). Once this initiation is approved, the project will be divided into manageable, well-organized tasks. Our mission is to ensure a seamless progression between project milestones. It was also briefly mentioned that certain tasks might need to be completed concurrently, while others will follow a sequential order. (Valacich & George, 2020)

One of various advantages of the WBS is its ability override potential risks, including those related to the time frame, cost, and feasibility. I am fully committed to implementing effective change management strategies to ensure a seamless and successful transition. Additionally, I've conducted a comprehensive comparison of the expenses and risks relative to your organization's size and potential return on investment (ROI). While this project involves few initial costs and operational challenges, I anticipate that the projected profits will outweigh these obstacles. Further details on this will be provided in the upcoming project phases. (Valacich & George, 2020)

Requirement List/Analysis

The process of defining specific system requirements has been implemented. The primary focus is enabling direct ordering of supplies by individual consumers. The system will enable the delivery of products directly to these consumers.

It is also of utmost priority that the system caters to (HPS) stakeholder interests. Customers are your primary focus. So, additional features for clientele have been incorporated, accommodating diversity in currency, language, or device type. Clients will also have access to customer support, review options, coupon code usage, and product recommendations. To address the needs of additional stakeholders, including the owner, higher management, investors, and compliance regulators, the following requirements were added: regulatory compliance, data-flow adequacy, and business-level operational considerations.

Following a comprehensive review, HPS management reached a decisive conclusion that their current system (originally tailored for vendor orders) is ill-suited for the transition to direct consumer ordering. Presented below are the new system requirements.

1. Enable online customer orders, allowing them to select various items and quantities.

2. Gather comprehensive customer information.

3. Provide customers with the option to create an account.

4. Automatically calculate the total order cost, inclusive of taxes.

5. Carry out application of any promotional codes and discounts, at checkout.

6. Offer secure payment methods such as credit card and PayPal.

7. Implement real-time inventory management to update product availability.

8. Provide a range of shipping choices to accommodate customer preferences. (info drawn from project rubric).

9. Connect to an immediate, customer support line.

11. Implement a customer feedback and review system.

12. Present product recommendations to customers.

13. Enable the platform to support multiple languages (for your diverse, customer base)

And allow users to select their preferred currency for transactions.

14. Mobile-friendly capabilities for users who prefer to utilize smartphones or tablets.

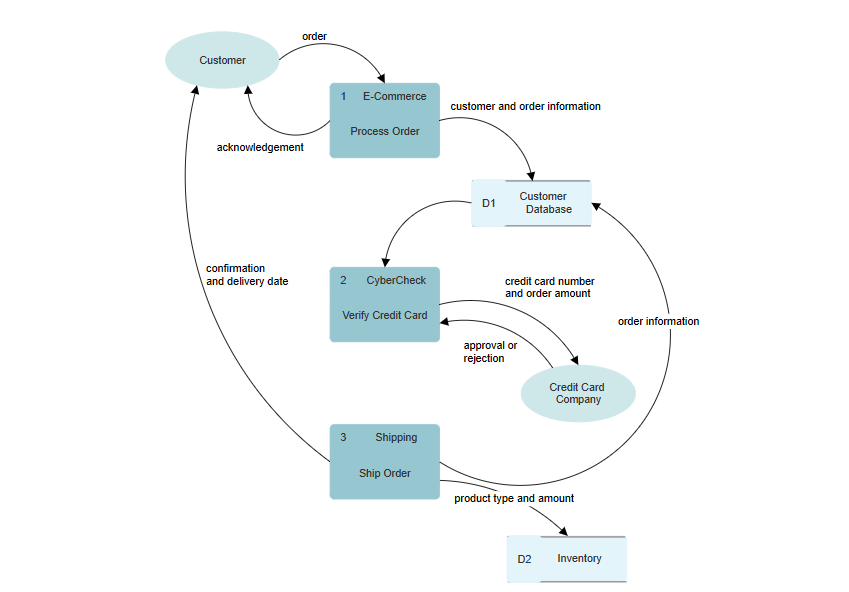
15. Adequately handle data, while supporting data-flow sequences and dependencies. (Valacich & George, p.147, 2020)

16. Will adhere to the regulations set by governing entities, whom serve you as both stakeholders and regulatory authorities. (Valacich & George, p.147, 2020)

17. Support policies and guidelines that describe the nature of HPS and the commercial landscape in which you operate. (Valacich & George, p.147, 2020)

**Figure 2**

*Data Flow Diagram for Online Ordering System*



Economic Feasibility Analysis

For the Economic Feasibility Analysis, I have used the provided figures to explain and present the following: Net Present Value, the Return on Investment and the Breakeven Analysis (Valacich & George, 2020). Proceeding, you will find a line chart to support my breakeven results.

The Net Present Value (NPV) of the project is $390,245. The present value of a project is established using a discount rate determined from the company’s cost of capital. The discount rate is used to determine the present value of both cash receipts and outlays. The NPV is a financial metric used to determine the profitability of a project. (Valacich & George, 2020)

The Return on Investment is 90.91%. The ROI is the ratio of net cash receipts to cash outlays for a project. Calculating the representative ROI ratio of this projects will direct us, financially, in pursuing a new system (Valacich & George, 2020).

The Breakeven Analysis will occur at the point of 3.06 years. The Break-Even Point (BEP) is the point at which the total cost of a project equals the total revenue generated by the project. The Break-Even Analysis (BEA) technique is used to determine the BEP and the time required for the cumulative cash flow from a project to equal its initial and ongoing investment. This projection is vital in weighing financial stability and project timeline (Valacich & George, 2020).

Developing Methodology

Leveraging an Agile methodology for the development of an online ordering system will be a wise choice for Hullabaloo Party Supplies (HPS). Agile methodology is a flexible and iterative approach to project management and development. It focuses on collaboration and customer feedback. By dividing work into short milestones, Agile enables teams to adapt quickly to changes and continuously improve the product. This methodology prioritizes individuals, working solutions, and customer collaboration over rigid processes.

The adaptability ensured by Agile will assist us in responding to any shifts in the market. Given the nature of your business, where customer preferences and market trends can swiftly evolve, Agile's adaptability will deliver a system that remains aligned with your business objectives.

By involving your key stakeholders throughout this development lifecycle, you ensure a tailored solution that precisely meets your unique needs. Regular interactions between business representatives and the development team, foster a profound understanding of objectives. This allows the Agile team to deliver not only on technical specifications but also on the strategic vision that underpins our company's success. In essence, Agile's collaborative, iterative, and adaptable nature is the ideal methodology for the successful implementation of our online ordering system.

Implementation Plan

A strategic and comprehensive approach will lead to the successful implementation of the online ordering software system. Here are six major activities to implement: coding, testing, installation, documentation, training, and support (Valacich & George, 2020). This proposal outlines a structured plan for the implementation phase, addressing key elements to ensure a smooth transition:

1. Documentation: Develop comprehensive system and user documentation for present success and future research consideration, throughout the process of this phase.
2. Employee Training: Provide employee training through various channels, including support and class training, company bulletin boards, a manual, and both help desk and automated support from the software vendor.
3. Beta Testing: Conduct beta testing to gather insights from a select group of users, refining the software based on their feedback.
4. Acceptance Testing: Obtain user (employees and beta testing group for the buyer market) sign-off on acceptance testing, ensuring the system aligns with expectations.
5. Confirmation of Requirements: Confirm that the software meets specified requirements through coordinated efforts with the software vendor.
6. Testing of Progress: Implement or utilize a series of tests, including the master test plan, unit test plan, integration test plan, system test plan, and software application testing.
7. Cyber Security and Bug Testing: Enhance cyber security measures for customer payment information and conduct thorough testing for bugs.
8. Direct Installation: Execute a "direct installation" strategy to roll out the software efficiently. The direct installation approach is well-suited for this system, given that the current system fails to cater to the needs of the target consumer.
9. Personal communication is vital for a successful project: This should be practiced throughout the implementation process (and all the phases) in its entirety. Foster open communication channels with the vendor and your own internal project team. Provide regular updates on testing, support, and successes.
10. Continuous Management Support and User Involvement: Success hinges on two critical factors — consistent management support and ongoing user involvement. These elements must be maintained throughout the entire development process for a successful outcome. (Valacich & George, 2020)

In conclusion, the success of the implementation phase is crucial for the subsequent transition into the Maintenance phase. This transition involves ongoing testing of progress and maintenance, as measured by the Mean Time Between Failures (MTBF) metric. By maintaining a vigilant approach to testing, communication, and support, you can aim to ensure the sustained success of your online ordering software system beyond the implementation phase. Which leads into a training and testing plan. (Valacich & George, 2020)

Training and Testing Plan

In the implementation phase of Management Information Systems (MIS), various tests, including the master test plan, unit test plan, integration test plan, system test plan, and software application testing, are conducted. These tests ensure the successful deployment of the system and supports identifying and addressing any issues or bugs before the system is fully operational. The master test plan provides an overarching strategy for testing, while unit, integration, and system test plans focus on specific aspects of the system's functionality. Software application testing is performed to evaluate the software's overall performance and functionality. (Valacich & George, 2020) (IncludeHelp, 2023)

Establishing a robust training program is crucial for the successful implementation of the new online ordering software system, ensuring that employees are well-equipped to navigate its functionalities. The program adopts a multifaceted approach, integrating various training modalities to cater to diverse learning preferences.

Management-led class trainings offer hands-on experience, providing a full representation of the system’s operational capabilities. Additionally, personalized support is provided through one-on-one assistance, addressing individual queries and concerns through vendor tech support or chat assistance. (Valacich & George, 2020)

The establishment of this dedicated help desk during working hours will provide real-time assistance to employees, ensuring immediate support for any challenges they may encounter. Utilizing automated support tools from the software vendor, such as chatbots, knowledge bases, and online resources, offers continuous assistance, enabling employees to find quick solutions independently. (Short, 2023)

To provide accessibility to instructional context, your organization will utilize company bulletin boards as visual aids. These boards will feature important updates, tips, and guidelines, serving as a readily available resource for employees. A comprehensive training manual will also be distributed, offering step-by-step procedures, troubleshooting tips, and best practices to empower employees with a detailed reference guide. (Larcom, 2023)

This structured training program not only accommodates various learning preferences but also emphasizes ongoing support. Regular feedback loops will be available to assess the effectiveness of training initiatives, allowing for adjustments and improvements as needed. By prioritizing employee training and support, the organization aims to enhance overall competency and user (employee) experience, contributing to the successful implementation of the new, online ordering software system.

Recommendations/Conclusions (Wrap-Up)

In light of the project's objectives and the evolving needs of Hullabaloo Party Supplies (HPS), the recommended solution is a custom-built software system. This tailored approach is the ideal choice to meet the diverse requirements and goals of HPS. It can efficiently address the project's key motive, providing an exceptional online shopping experience for individual consumers, including multi-item orders, various payment options, and integrated inventory management. We can have a software that is structured to offer flexibility through multiple shipping choices, as well.

I have presented the project's purpose and its corresponding solutions. We've identified and engaged with your stakeholders while providing a high-level breakdown of the necessary work and requirements. This thorough analysis has addressed your objectives and expectations, and my findings indicate that the project will yield profitable results.

The project would lead with testing and monitoring. Throughout the project and again during the Implementation phase, a comprehensive testing strategy would occur. The following tests would be utilized: Encompassing master, unit, integration, and system test plans, along with software application and beta testing. The implementation of these tests directs HPS toward the successful deployment of the system. These tests collectively identify and address potential issues or bugs, ensuring that the software's overall performance and functionality meet the desired standards (Valacich & George, 2020; IncludeHelp, 2023).

In the implementation stage, HPS will provide comprehensive support and training to empower employees to proficiently utilize the system's full potential. A comprehensive training program overview would concentrate on enhancing employee competency to facilitate a smooth transition to the new online ordering software system. Through expert-led class training sessions, personalized support, visual aids on company bulletin boards, a detailed training manual, and a dedicated help desk, employees can develop essential skills for proficient system navigation. HPS will leverage automated support from the software vendor who will ensure continuous assistance. The program prioritizes ongoing learning, incorporating regular feedback loops for adjustments. (Larcom, 2023) (Short, 2023)

In summary, the recommended custom-built software system aligns seamlessly with Hullabaloo Party Supplies' objectives, addressing diverse needs and offering key features for an exceptional online shopping experience. The presentation of the project's purpose, stakeholder engagement, and detailed work breakdown indicates a thorough analysis, projecting profitable results. The comprehensive training program and robust testing procedures are tactically designed to ensure a smooth implementation and contribute to the overall success of the advanced online ordering software system.

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