Date: 28th January 2022

To,

Bill Nixon,
Sr. Business Analyst,
Conestoga College,
Kitchener, ON

Subject- Regarding the OHT Project Management Plan

Respected Mr. Nixon,

I hope you are doing well. I am Mayurkumar Rafaliya, the Project Manager of Team G. I am writing this letter regarding the project management plan developed for the project Executive Dashboard for OHT. The following documents created for the management plan are as follows:

- Client Background
- Project Scope
- Tools and Techniques
- Considerations

It would be a great honor for us if you could review the document and provide your valuable feedback, which would guide us for future analysis. I look forward to hearing from your soon.

Regards,

Mayurkumar Rafaliya
(Project Manager)

1/28/2022

PROJECT MANAGEMENT DOCUMENT

EXECUTIVE DASHBOARD PROJECT

INFO8440

TEAM G

MAYURKUMAR RAFALIYA
PRAJWAL NAYAK
JIGEESHA KOCHER
ANUSHA ASOKAN PALAT
CATHLEEN MATHEW MUNDAT
CHAITANYA KEESARI

Table of Contents

1. DOCUMENT HISTORY CHART

REVISED DATE	DOCUMENT NAME	PERFORMED BY	ACTION
1/28/2022	Cover Letter	Jigeesha Kocher	Created Cover letter
1/27/2022	Client Background	Anusha Asokan Palat	Researched and created client background
1/28/2022	Project Scope	Jigeesha Kocher	Created project scope
1/28/2022	Tools and Techniques	Mayurkumar Rafaliya Prajwal Nayak Cathleen Mathew Mundat	Researched and came up with tools and techniques components
1/27/2022	Team Charter	Anusha Asokan Palat	Created and signed the team charter
1/28/2022	RACI Matrix	Mayurkumar Rafaliya Prajwal Nayak Cathleen Mathew Mundat	Created RACI in excel
1/27/2022	Work Breakdown Structure	Cathleen Mathew Mundat	Created the WBS
1/28/2022	Gantt Chart	Cathleen Mathew Mundat, Prajwal Nayak, Mayurkumar Rafaliya	Created the Gantt chart according to the data
1/28/2022	Risk Mitigation List	Chaitanya Keesari	Identified and determined the risk mitigation list
1/28/2022	Considerations	Chaitanya Keesari Jigeesha Kocher	Determined and created various considerations
1/28/2022	Report Components	Jigeesha Kocher	Formatted the document
1/28/2022	Final Review of Document	Mayurkumar Rafaliya Prajwal Nayak Cathleen Mathew Mundat Anusha Asokan Palat Jigeesha Kocher	Reviewed the document

2. CLIENT BACKGROUND

History of OHT

Oury Health Tech Ltd (OHT), a business-to-business organization, started its business in January 1998, selling medical equipment to the local medical clinic. The CEO of the company is Billy Bob. The organization has 6 Executives in 6 various departments. With a minimum of 500 employees, OHT managed to be the market leader in January 2016. OHT mainly focuses on quality and meticulously builds the product; hence was recognized for its reliability.

Being successful in business, OHT wanted to enhance its business and developed TrackR in February 2017. TrackR is a wearable fitness monitor with an application for home consumers. The newly launched product gained more public attention and also social media attention. The projected sales numbers for TrackR were about 5000 a month. Even the TrackR was appreciated for its design and awarded at CES in March 2017. The organization achieved record-high sales and celebrated the achievement.

In July 2018, a major retailer, big Box, returned 7000 TrackR's due to complaints about TrackR's application. The TrackR's wearable piece was working fine. Eventually, in December 2018, the company announced the potential bankruptcy in the upcoming two years. So, the organization planned to hire Business Analysts to help with better decision-making and eventually move the business back on track. The significant purpose of the hired Business Analysts is to study the client requirements and develop an effective dashboard by identifying relevant metrics.

List of the involved persons / roles / actors / stakeholders

The following table displays the people involved in their roles/ actors /stakeholders.

ID.No.	Involved Persons	Role/Actors	Description
1	Billy Bob	CEO	Client/ Stakeholder
2	Bill Nixon	Senior Business Analyst / Professor	Stakeholder
3	Mayurkumar Rafaliyaa	Project Manager / Team G Member	Stakeholder
4	Prajwal Pundalika Nayak	Junior Business Analyst / Team G Member	Stakeholder
5	Jigeesha Kocher	Junior Business Analyst / Team G Member	Stakeholder
6	Cathleen Mathew Mundat	Junior Business Analyst / Team G Member	Stakeholder
7	Chaitanya Keesari	Junior Business Analyst / Team G Member	Stakeholder
8	Anusha Asokan Palat	Junior Business Analyst / Team G Member	Stakeholder
9	Manufacturing VP	Vice President	Client/ Stakeholder
10	Human Resource VP	Vice President	Client / Stakeholder
11	Finance Vp	Vice President	Client / Stakeholder
12	Facilities VP	Vice President	Client / Stakeholder
13	Marketing Vp	Vice President	Client / Stakeholder
14	IT VP	Vice President	Client / Stakeholder

List of current business challenges of OHT

The following table lists the present challenges faced by OHT.

ID.No	Current Business Challenges	Description
1	Lack of proper metrics	The organization does not use appropriate metrics to make effective decision making
2	No regular meetings with VPs	The CEO does not meet with the VPs regularly; hence he will be unaware of the situation under each department.
3	Lack of awareness	The company is unaware of the computer skills and knowledge and the learning styles of 6 VPS
4	Minimal technical knowledge	The management possess minimal knowledge about business data and management technologies
5	No effective dashboard	Currently, there is no effective dashboard in place to make a vital decision

The brand(s) involved, and their current statuses

The following list shows the brands or competitors involved in the sales like OHT and displays the current sales in 2019.

S.No	Brands/Competitors	Current Status / 2019 Sales
1	Apple	1,07,00,000
2	BBK	31,00,000
3	Fitbit	2,40,00,000
4	Garmin	61,00,000
5	Jawbone	15,25,000
6	Nike	0
7	OHT	26,100
8	Other	3,60,00,000
9	Samsung	50,00,000
10	TomTom	10,00,000
11	Xiaomi	1,87,00,000

The AS-IS Principles or Key Metrics of OHT

The metrics are yet to be defined; hence added the same in the below table.

ID.No	AS-IS Principles / Metrics	Description
1	Metric 1	- Metric yet to be defined -
2	Metric 2	- Metric yet to be defined -
3	Metric 3	- Metric yet to be defined -
4	Metric 4	- Metric yet to be defined -
5	Metric 5	- Metric yet to be defined -
6	Metric 6	- Metric yet to be defined -

3. PROJECT SCOPE

Project Name:	Executive Dashboard
Date Submitted:	1/28/2022
Prepared By:	Jigeesha Kocher
Project Start Date:	
Project End Date:	
Senior Business Analyst:	Bill Nixon
Program Manager:	Mayur Kumar Rafaliya

Known Client Requirements:

For more details, please go through points 1 to 10 in the attached document named 'P1 Exec Dashboard 21May07' (Link:

https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890068/View).

This document was provided to us by the client.

Summary of Project Deliverables:

DlvID	Project Final Deliverables (RFIs and PM Docs Deliverables are optional)	Need / Requirement ID
A	Cover Page	20
B	Cover letter	20
C	Page Headers, Footers and Numbering	20
D	TOC	20
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F	Executive Summary	21
G	Assumptions	21
H	Conclusions	21
J	Background of client	22
K	Overview of Client	22
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M	Requirement Elicitation Report	42,43
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T	Historical & Live TrackR Data	46
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W	Identifying Project Benefits	26
X	List and descriptions of Risks	26
Y	6 Metrics for OHT	41
Z	Project Planning	45
AA	Gantt Chart	
AB	Document Quality Check	
AC	Scope Change document	
AD	Interview report	
AE	Survey Report	
AF	Identify Flaws and/or Issues - Text and Diagrams	26
AG	SWOT Analysis of Dashboards	44
AH	Risk Management Plan	52
AI	Executive Dashboard Creation using PowerBI	46
AJ	Use Case Diagram	54
AK	Implementation Strategy Document	45
AL	Gap Analysis Document	48
AM	Process flow Diagram	48
AN	ERD Diagram	49
AO	Pseudo-code Document	48
AP	Agile Development Document	51
AQ	Personas	50
AR	Wireframes	50
AS	CockBurn Template	54
AT	Mockups	50
AU	Metric document	45
AV	Merged Final Report	
AW	Powerpoint Presentation	
AX	Final RFI report	54
AY	RACI+ Workbook Completed	
AZ	Daily Worklogs for Each Team Member	

Activities to do to produce the Deliverables: For most of the deliverables mentioned, we will be researching, creating, developing, packaging, and publishing them.

4. TOOLS AND TECHNIQUES

RACI MATRIX

RACI (Responsible, Accountable, Consulted, Informed) Matrix is a chart used to determine the role and responsibility of the tasks of all the employees. Also, it consists of all the decisions taken place while working on the project's deliverables.
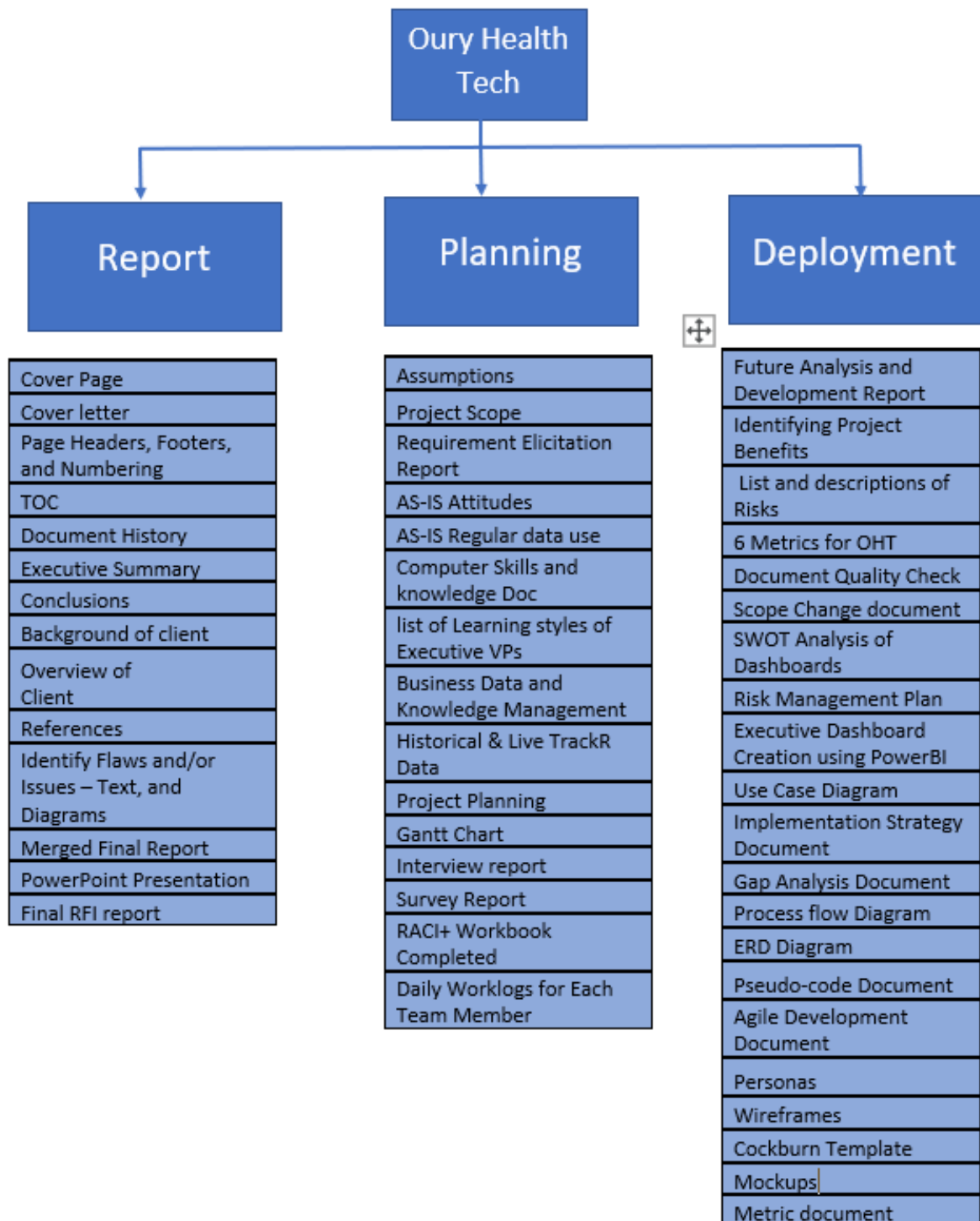
Please find the attached file.

GANTT CHART

A Gantt chart is used for planning and scheduling all the work. It is mainly used to simplify complex projects. It consists of the start date, end date, duration, and progress of each activity.

Please find the attached file named 'W22_Team_G_INFO8440_Project_1_RACI_matrix_Ghantt_chart'.

5. WORK BREAKDOWN STRUCTURE(WBS)

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                        Oury Health
                            Tech
        ┌───────────────────┼───────────────────┐
        ▼                   ▼                   ▼
      Report            Planning            Deployment
```

Report	Planning	Deployment
Cover Page	Assumptions	Future Analysis and Development Report
Cover letter	Project Scope	Identifying Project Benefits
Page Headers, Footers, and Numbering	Requirement Elicitation Report	List and descriptions of Risks
TOC	AS-IS Attitudes	6 Metrics for OHT
Document History	AS-IS Regular data use	Document Quality Check
Executive Summary	Computer Skills and knowledge Doc	Scope Change document
Conclusions	list of Learning styles of Executive VPs	SWOT Analysis of Dashboards
Background of client	Business Data and Knowledge Management	Risk Management Plan
Overview of Client	Historical & Live TrackR Data	Executive Dashboard Creation using PowerBI
References	Project Planning	Use Case Diagram
Identify Flaws and/or Issues – Text, and Diagrams	Gantt Chart	Implementation Strategy Document
Merged Final Report	Interview report	Gap Analysis Document
PowerPoint Presentation	Survey Report	Process flow Diagram
Final RFI report	RACI+ Workbook Completed	ERD Diagram
	Daily Worklogs for Each Team Member	Pseudo-code Document
		Agile Development Document
		Personas
		Wireframes
		Cockburn Template
		Mockups
		Metric document

6. TEAM CONTRACT

Date: 01/28/2022

Project Name: Executive Dashboard Project

Project Team Members' Names and Sign-off:

Name	Date
Mayurkumar Rafaliya	01/28/2022
Prajwal Pundalika Nayak	01/28/2022
Jigeesha Kocher	01/28/2022
Cathleen Mathew Mundat	01/28/2022
Chaitanya Keesari	01/28/2022
Anusha Asokan Palat	01/28/2022

Code of Conduct: As a project team, we will:

- Work with dedication, come up with a practical solution, coordinate with each member in the group, predict potential issues, and work together to avoid problems.

- Be truthful and honest that we will follow ethics and rules.

- Be courteous and patient to all the team members in the group.

- Concentrate on what is best for the project team and keep every team member updated.

Participation: We will:

- Respect each team member's various functional and technical roles.

- Respect the views of every team member and value their unique ideas and opinions.

- Treat every member of the team equally valuable.

- Inform the Project Manager well in advance about the absence of a team member for a meeting or any issues meeting a deadline for an assigned task.

- Consider innovative ideas and be always open to suggestions and opinions.

Communication: We will:

- Maintain contact to the team in the best available options to respond, especially if it's urgent and essential, i.e., text message, e-mail, a project website, and any other technology.
- Organize every team meeting through zoom online video conferencing as required.
- Communicate our ideas and suggestions to the team clearly and concisely.
- Make sure to eliminate any communication ambiguities.

Problem Solving: We will:

- Set our goals, communicate them with the rest of the team, and work together to achieve them.
- Encourage every team member to participate and share their views and ideas.
- Make sure only to use constructive criticism and not blame other people.
- Participate in problem-solving, troubleshooting the problem, and effective decision-making.

Meeting Guidelines: We will:

- Make use of the class hours and connect through the online zoom meeting till 4.00 PM on Thursday and Friday.
- Schedule an online zoom meeting apart from class hours after 4.00 PM on Thursday and Friday, and during the other days, schedule meetings as per the availability of team members.

7. CONSIDERATIONS

Risk Mitigation Plan

Risk	Risk Occurrence	Risk Impact	Risk Description	Risk Mitigation
Individual Issues	High	Moderate	A team member not being able to contribute due to personal/health/other issues could affect the outcome of the group.	Creating a RACI, conducting daily scrum meetings to follow up on the deliverables staying up to date on the individual progress, supporting one another, and working as a team to deliver the best outcome.
Team Disputes	High	Moderate	One or more team members have disagreements over varied opinions.	The manager will be responsible for conducting team meetings meeting with the individuals facing the dispute to discuss the issue and resolve it, considering all the team opinions not to affect the team's outcome.
Unorganized Workload	Moderate	High	One or more team members could face unequal workload due to the unorganized distribution of work.	A properly planned, team-approved RACI is established and updated during the projects. We will conduct daily scrum meetings, which will take feedback to avoid overburdening the team members.
Unforeseen Circumstances	Low	High	One or more facing a blackout/Internet Issues/Weather Conditions, etc., could affect meeting the deadlines.	The Team Manager will be responsible for contacting the team member/s to check if everything is alright and assign the work among other team members to cover for the affected individual/s or contact the client to explain the situation and request an extension.

Style Guide

Title Font	
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Heading 1	
Size	16
Style	Heading 1
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Heading 2	
Size	13
Style	Heading 2
Font	Calibri (Body)
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Body	
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Colour	Black

Team Management Plan

1. We will create a RACI to establish the deliverables correctly and who is Responsible and Accountable for which deliverables to avoid any space for ambiguity.
2. The team will conduct regular scrum meetings to track the progress of the deliverables, proofread the reports and submit the deliverables.
3. Team members not contributing their part in any way is unacceptable.
4. The team will conduct regular discussions to encourage the expression of varied opinions to be a better team.
5. The team will judge and analyze the performance based on the feedback provided by the client.

Measures of Success

Scope- To satisfy the client by delivering a Dashboard with required metrics to track the company's progress, profits, and customer satisfaction to increase the company's brand reputation and profit margin with good use of the Executive Dashboard.

Budget- To complete the project in the allocated budget.

Schedule: To work efficiently as a team, effectively communicate through regular scrum meetings, and follow the RACI to meet the deadlines without fail.

Team Satisfaction- To look after one another by helping one another in the team while working on the deliverables ensuring individual satisfaction in working as a team.

Client Satisfaction: Client approval is treated as most important. Feedback sessions will be held to discuss the scope of improvement after each deliverable.

8. REFERENCES

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