

Date: March 4, 2022

To,

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

Subject- Regarding the Project 2 – Project Management Documents

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 documents created in project 2 for developing the TrackR AS-IS and TO-BE model for OHT. The following are a few essential documents created for the Project 2 Project Management Documents deliverable:

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

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

Regards,

Mayurkumar Rafaliya  
(Project Manager)



# PROJECT MANAGEMENT DOCUMENTS

Project 2

## **Team G**

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JIGEESHA KOCHER  
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ANUSHA ASOKAN PALAT

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## 1. DOCUMENT HISTORY CHART

S.NO	REVISED DATE	DOCUMENT NAME	PERFORMED BY	ACTION
1	3/3/2022	Cover Letter	Jigeesha Kocher	Created Cover letter
2	3/4/2022	Client Background	Anusha Asokan Palat	Researched and created client background
3	3/3/2022	Project Scope	Jigeesha Kocher	Created project scope
4	3/3/2022	Tools and Techniques	Mayurkumar Rafaliya Prajwal Nayak Cathleen Mathew Mundat	Researched and came up with tools and techniques components
5	3/3/2022	Team Charter	Anusha Asokan Palat	Created and signed the team charter
6	3/3/2022	RACI Matrix	Mayurkumar Rafaliya Prajwal Nayak Cathleen Mathew Mundat	Created RACI in excel
7	3/3/2022	Work Breakdown Structure	Cathleen Mathew Mundat	Created the WBS
8	3/3/2022	Gantt Chart	Cathleen Mathew Mundat, Prajwal Nayak, Mayurkumar Rafaliya	Created the Gantt chart according to the data
9	3/3/2022	Risk Mitigation List	Chaitanya Keesari	Identified and determined the risk mitigation list
10	3/3/2022	Considerations	Chaitanya Keesari Jigeesha Kocher	Determined and created various considerations
11	3/4/2022	Report Components	Anusha Asokan Palat	Formatted the document
12	3/4/2022	Final Review of Document	Team G	Reviewed the document

## 2. CLIENT BACKGROUND

### History and Background 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 is planning to expand in the future; currently, they have six executives working under multiple departments with 100 employees.

Later, OHT developed TrackR, a wearable fitness monitor with the application, in February 2017 to enhance its business. The projected sales numbers for TrackR were about 5,000 a month. Currently, the organization manufactures three different types of TrackRs: TrackR A, TrackR B, and TrackR C. From February 2017 to June 2019, the organization has sold 134,338 TrackRs, with the sum of invoice items \$ 19,344,360.00 cad, where the total cost of production is \$ 15,924,160.00 cad. Also, the total product returns amount for the company is \$ -1,463,797.00 cad. In July 2018, a major retailer, big Box, returned 7,000 TrackRs due to complaints about TrackR's application.

Eventually, in December 2018, the company announced the potential bankruptcy in the upcoming two years. The organization now requires three vital suggestions on re-organizing their present manufacturing process to achieve financial breakeven at least. The Business Analysts are to develop an AS-IS model and eventually a To-Be model of the TrackR to help OHT identify the flaws and restructure the manufacturing process.

More details about client background can be checked in the attached file with filename:

1. OHT Timeline Phase 1 210507
2. OHT Master Document 01 - Introduction 210507
3. OHT Org Chart as of 2018July – 210530
4. P2 OHT Needs 21May07
5. P2 Prodn Team Deliverables 21May07

### 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	Manufacturing VP	Vice President	Client/ Stakeholder
3	Human Resource VP	Vice President	Client / Stakeholder
4	Finance VP	Vice President	Client / Stakeholder
5	Facilities VP	Vice President	Client / Stakeholder
6	Marketing VP	Vice President	Client / Stakeholder
7	IT VP	Vice President	Client / Stakeholder
8	Tracker's Customers	Customer	Stakeholder
9	Medical Imaging's Customers	Customer	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 guidance	The company needs guidance on Six Sigma philosophy and techniques.
2	Production Issues	The organization is facing issues in the production of TrackR due to an unorganized manufacturing system.
3	Fiscal Breakeven not achieved	The organization has not achieved the financial breakeven point.
4	Unorganized manufacturing process	The manufacturing process in the organization is not organized, which causes production issues.
5	Lack of Health and Safety	The company faces some concerns regarding health and safety under environmental change.

### The brand(s) involved, and their current statuses

The following list shows the brands, competitors, and suppliers involved in wearable fitness monitor sales and OHT and their status.

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

S.No	OHT Organization	Current Status
2	OHT TrackR	Business
3	OHT Medical Imaging	Business
4	TrackR Customers	End Users
5	Medical Imaging Customers	End Users

S.No	Current Suppliers
1	Samsung
2	life.augmented
3	American Vanadium
4	Banda.com
5	bluegiga
6	Qualcomm

### The AS-IS Principles or Key Metrics of OHT

The below table shows the AS-IS principles followed in OHT under their various business.

ID. NO	AS-IS Principles	Business
1	Increase production performance	TrackR
2	Increase in sales quantity	TrackR
3	Achieve financial breakeven	TrackR
4	Enhance health and safety	TrackR
5	Improve cashflow	TrackR
6	Change staff payrates	TrackR

### 3. PROJECT SCOPE

<b>Project Name:</b>	<b>TrackR AS-IS and TO-BE model for OHT</b>
<b>Date Submitted:</b>	3/4/2022
<b>Prepared By:</b>	Jigeesha Kocher
<b>Project Start Date:</b>	
<b>Project End Date:</b>	
<b>Senior Business Analyst:</b>	Bill Nixon
<b>Program Manager:</b>	Mayur Kumar Rafaliya

#### Known Client Requirements:

For more details, please go through points 1 to 12 in the attached document named 'P2 OHT Needs 21May07' (Link:

<https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890079/View>).

This document was provided to us by the client.

#### Summary of Project Deliverables:

DivID	Project Final Deliverables (RFIs and PM Docs Deliverables are optional)	Need / Requirement ID
<b>A</b>	Letter of Transmittal	20
<b>B</b>	Cover Page	20
<b>C</b>	Page Headers, Footers and Numbering	20
<b>D</b>	TOC	20
<b>E</b>	Document History	20
<b>F</b>	Executive Summary	21
<b>G</b>	Assumptions	21
<b>H</b>	Conclusions	21
<b>I</b>	Background and overview of client	22
<b>J</b>	Requests for Information with NDA (included as an Appendix)	22
<b>K</b>	Project Scope Document	24
<b>L</b>	AS-IS Excel Component sheet	61
<b>M</b>	AS-IS Excel Component Price sheet with max and min value	62
<b>N</b>	AS-IS Excel Picking sheet	68
<b>O</b>	AS-IS Excel Assembly Actions, Components, Tests, Failure Rates and Movements sheet	69
<b>P</b>	AS-IS Excel Assembly - Labour Costs	71
<b>Q</b>	AS-IS Excel Assembly - Component Costs, Totals (Running and Grand)	72
<b>R</b>	AS-IS Excel Assembly - Labour & Component Costs, Totals (Running and Grand) response to Test fails	73
<b>S</b>	AS-IS Excel Assembly Movement	74
<b>T</b>	Business Challenges	22



<b>U</b>	Current Brands Involved and their Statuses	26
<b>V</b>	AS-IS Excel Employee detail sheet	
<b>W</b>	AS-IS Excel Schedule sheet	63
<b>X</b>	AS-IS Spaghetti Diagram	65
<b>Y</b>	AS-IS Spaghetti Diagram labels and Notes	66
<b>Z</b>	Gantt Chart	
<b>AA</b>	AS-IS Daily production sheet	75
<b>AB</b>	AS-IS Average Production sheet	75
<b>AC</b>	AS-IS Wholesale sheet	76
<b>AD</b>	AS-IS Workbook Documentation	76
<b>AE</b>	AS-IS Profit and Loss Model (P&L) data	77
<b>AF</b>	AS-IS Profit and Loss Model (P&L) calculations	78
<b>AG</b>	AS-IS Profit and Loss Model (P&L) income calculations	79
<b>AH</b>	Detailed References for all Sources of Knowledge	23
<b>AI</b>	Possible Future Analysis and Development for TrackR manufacturing process	26
<b>AJ</b>	Measuring Success and Failure in improving TrackR manufacturing process	26
<b>AK</b>	Probable Benefits of Changing TrackR manufacturing Process	26
<b>AL</b>	Suggestion Overview	1
<b>AM</b>	Six sigma and Failure reduction process report	4
<b>AN</b>	TO BE model - Six sigma process	3
<b>AO</b>	Siplace Impact and ROI report	5
<b>AP</b>	TO BE model - Siplace machine impact	5
<b>AQ</b>	TO BE Picking process - Financial excel model	43
<b>AR</b>	TO BE Assembly process - Financial excel model	43
<b>AS</b>	TO BE Staffing process - Financial excel model	43
<b>AT</b>	Training, Needs and plans	6
<b>AU</b>	Suggestion on Environment Changes	7
<b>AV</b>	Constraints on Restructuring workspace	9
<b>BX</b>	Merged Final Report	
<b>BY</b>	PowerPoint Presentation	
<b>BZ</b>	Final RFI report	23
<b>CA</b>	RACI+, Documentation, Backup Sheets	
<b>CB</b>	Time and Effort Reporting	25

**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 with the file name:

'W22\_INFO8440\_TeamG\_Project2\_RACIMatrix\_GanttChart'.

### 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.

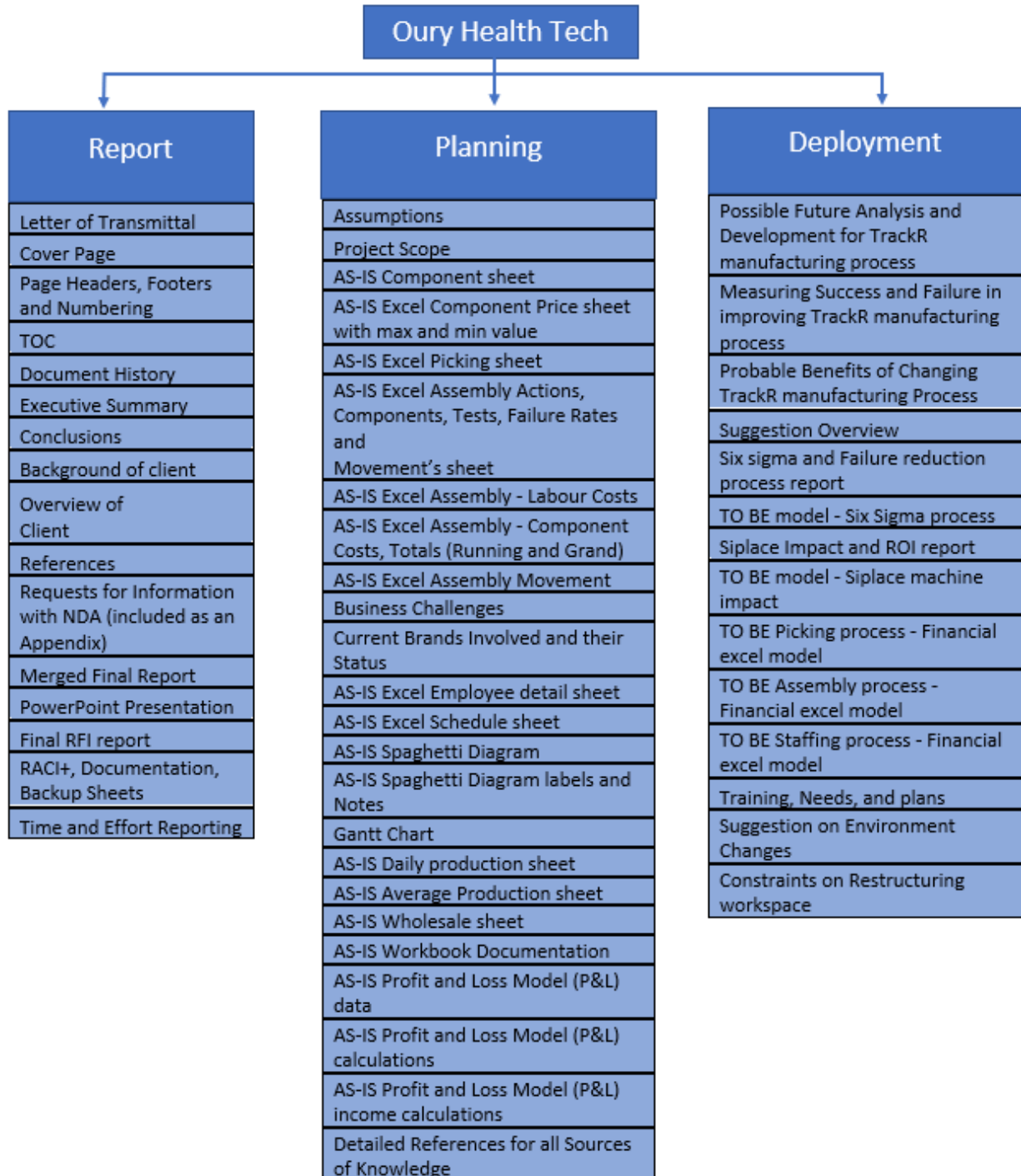
Please find the attached file with the file name:

'W22\_INFO8440\_TeamG\_Project2\_RACIMatrix\_GanttChart'.

## 5. WORK BREAKDOWN STRUCTURE(WBS)

The following work breakdown structure diagram is a project management tool used to break down a large project into smaller pieces of work.

Figure 1: Work Breakdown Structure



## 6. TEAM CONTRACT

**Date: 03/04/2022**

**Project Name: TrackR AS-IS and TO-BE model for OHT**

**Project Team Members' Names and Sign-off:**

S.No	Name	Date	Signature
1	Mayurkumar Rafaliya	03/04/2022	<i>Mayurkumar Rafaliya</i>
2	Prajwal Pundalika Nayak	03/04/2022	<i>Prajwal Pundalika Nayak</i>
3	Jigeesha Kocher	03/04/2022	<i>Jigeesha Kocher</i>
4	Cathleen Mathew Mundat	03/04/2022	<i>Cathleen Mathew Mundat</i>
5	Chaitanya Keesari	03/04/2022	<i>Chaitanya Keesari</i>
6	Anusha Asokan Palat	03/04/2022	<i>Anusha Asokan Palat</i>

**1. Code of Conduct:** As a project team, we will:

- 1.1 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.
- 1.2 Be truthful and honest that we will follow ethics and rules.
- 1.3 Be courteous and patient to all the team members in the group.
- 1.4 Concentrate on what is best for the project team and keep every team member updated.

**2. Participation:** We will:

- 2.1 Respect each team member's various functional and technical roles.
- 2.2 Respect the views of every team member and value their unique ideas and opinions.
- 2.3 Treat every member of the team equally valuable.
- 2.4 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.
- 2.5 Consider innovative ideas and be always open to suggestions and opinions.

**3. Communication: We will:**

- 3.1 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.
- 3.2 Organize every team meeting through zoom online video conferencing as required.
- 3.3 Communicate our ideas and suggestions to the team clearly and concisely.
- 3.4 Make sure to eliminate any communication ambiguities.

**4. Problem Solving: We will:**

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

**5. Meeting Guidelines: We will:**

- 5.1 Make use of the class hours and connect through the online zoom meeting till 4.00 PM on Thursday and Friday.
- 5.2 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

The below table depicts the risks and risk mitigation involved in this project.

S. No	Risk	Risk Occurrence	Risk Impact	Risk Description	Risk Mitigation
1.	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.
2.	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.
3.	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.
4.	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	
Size	36
Style	Heading 1
Font	Calibri Light (Headings)
Colour	Blue, Accent 1, 40% Darker
Example	Title
Heading 1	
Size	16
Style	Heading 1
Font	Calibri Light (Headings)
Colour	Blue, Accent 1, 25% Darker
Example	Heading 1
Heading 2	
Size	13
Style	Heading 2
Font	Calibri Light (Headings)
Colour	Blue, Accent 1, 40% Darker
Example	Heading 2
Heading 3	
Size	12
Style	Heading 3
Font	Calibri Light (Headings)
Colour	Blue, Accent 1, 40% Darker
Example	Heading 3
Body	
Size	12
Style	Normal
Font	Calibri (Body)
Colour	Black
Example	Content

## Team Management Plan

The team's project plan for successful project completion has been listed here.

1. **During the project development**, 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. The team will conduct regular discussions to encourage the expression of varied opinions to be a better team.
4. **Before the project deadline**, the team will ensure that all team members contribute their part according to the RACI. If any work is found incomplete, the team makes an effort to complete the task.
5. The team will judge and analyze the performance and work based on the feedback provided by the client.
6. **Nearing the project deadline**, the team checks the RACI for task completeness and checks for any missed work.

## Measures of Success

Here, the team's success measures after the project completion are listed.

1. **Schedule:** To work efficiently as a team, effectively communicate through regular scrum meetings, and follow the RACI to meet the deadlines without fail.
2. **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.
3. **Client Satisfaction:** Client approval is treated as most important. Feedback sessions will be held to discuss the scope of improvement after each deliverable.
4. **Achieve good grades:** To score good grades after successful project completion.

## Assumptions

No Assumptions



## 8. REFERENCES

1. EConestoga. (2022, February 23). *INFO8440 Project 3 Production Overview 21May05*. EConestoga. Retrieved February 25, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890063/View>
2. EConestoga. (2022, February 23). *P2 Prodn Team Deliverables 21May07*. EConestoga. Retrieved February 25, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890078/View>
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12. EConestoga. (2022, February 23). *Feedback for Phase 2 Team Scrums - Videos*. EConestoga. Retrieved March 04, 2022, from [https://conestoga.desire2learn.com/d2l/lms/dropbox/user/folder\\_user\\_view\\_feedback.d2l?db=567112&grpid=568180&isprv=0&bp=0&ou=539481](https://conestoga.desire2learn.com/d2l/lms/dropbox/user/folder_user_view_feedback.d2l?db=567112&grpid=568180&isprv=0&bp=0&ou=539481)
13. EConestoga. (2022, February 23). *Feedback for Project 2 Requests for Information*. EConestoga. Retrieved March 04, 2022, from [https://conestoga.desire2learn.com/d2l/lms/dropbox/user/folder\\_user\\_view\\_feedback.d2l?db=555245&grpid=568180&isprv=0&bp=0&ou=539481](https://conestoga.desire2learn.com/d2l/lms/dropbox/user/folder_user_view_feedback.d2l?db=555245&grpid=568180&isprv=0&bp=0&ou=539481)
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