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## **i. Description of project**

**Project sponsor:** Channel manager

**Product users:** operations department agents (R & C fulfilment) and eventually organization wide

The project will involve the creation of a web application that catalogues processes called, 'the Process Log', it will visually convey department processes and allow for easy and quick customization of the process. The Process Log will be accessed by all employees and will be accessed through their working computer via a link that will be provided. It will have an elaborate search function that allows agents to search for their departments within the organization and have access to all that department's processes. Processes can be bookmarked and referred to easily. Process log can be customized by a team leader using its easy interface and any changes will be forwarded automatically to the manager immediately above them.

## **Task 1**

### **ii. Reviewing the Problem**

#### **Problem identified**

Being a client facing function that is being fulfilled at my place of work, we faced with a very critical and potentially detrimental problem to the organization. We have an ever changing process, and a very poor method of communicating these changes, which makes it difficult for us to maintain a consistency in our interaction with clients. Due to these inconsistencies clients end up having to perform more than once on a single issue and this agitates them and a lot have requested to cut ties with the organization due to this. The function we fulfil is driven by a legislative requirement, so it is organization (bank) wide, but all areas of the bank that are involved are following their own processes around this function.

#### **Proposed solution**

The department needs a better way to communicate process, a way that will ensure that everyone has access, a way that is simple and that allows management to monitor and ultimately alter the presented process as desired. This solution is a Web Application hosted internally that graphically and textually outlines the processes. This page allows anyone to build a process visually and textually. This program can be written by our own internal IT department.

**Table 1.1: Causes and symptoms**



(Note: Additions are bolded)

**Symptoms**

- Inconsistences in work flow
- Agents not being aware of process changes
- Time consumed by fixing mistakes due to not knowing processes.
- Management feeling its being ignored
- Agents going to other agents to verify information
- **More people's work failing the QA process**
- **Agents not trusting their leader's information**
- **Agents sounding incompetent to clients**
- **Departments carry out their own functions around the same function**
- **Clients end up feeling like we running a scam**
- **This leads to use pushing clients to the branches more and more (Unfortunately branch staff are not trained on this function)**

**Root cause**

- Email is cluttered by system updates and organization's news
- Long emails from team leaders
- Inconsistent messages due to inconsistent understanding of management instructions
- Target driven environment (no time to check emails)
- Agents hesitate to approach their team leaders
- **This function is not standardized across the whole bank**

### iii.Looking back at the Scope

The scope statement is missing the function of making other departments aware of this function and encouraging them to use the Process Log as a reference for this function. Process log will be a cheap and effective way to synchronize all these departments around the function. However this is beyond the scope of the project. The project is about building a system to house processes for anyone in the organization to access. It doesn't define the process, although agents will have access to processes from different departments. What is within this project's scope is putting together a brief document for the project that will precede this one: The Roadshow, this is where the Roadshow crew will go into different departments in

different locations of the organization and teach people about our function and about the Process log app.

## **Project Scope**

### **Project description**

The project will involve the creation of a web application that catalogues processes called, 'the Process Log', it will visually convey department processes and allow for easy and quick customization of the process. The Process Log will be accessed by all employees, and will be accessed through their working computer via a link that will be provided. It will have an elaborate search function, which allows agents to search for their departments within the organization and have access to all that department's processes (other departments are not part of the scope of the current project but they will use Process log once it is rolled out organization wide). Processes can be bookmarked and referred to easily. Process log can be customized by team leaders using its easy interface.

### **Deliverables**

- The Project's aim is to deliver a working, easy to use browser-based web application.
- Create a brief for a project to Introduce the CRS function and the Process Log to other departments

### **Stakeholders**

- COO of the division
- Channel manager
- Team leaders
- Compliance
- Business Analyst
- Developers
- Training facilitator
- Users (Agents)
- **Road show project manager:** they are an Addition from previous projects, they will prepare the business case for the roadshow project
- Government

### **Resources Required**

- Human resources required:
  - Business analyst
  - Compliance officer
  - Training facilitator
  - Team leaders of segments
  - UX, UI Developer
  - Server Developer
  - Database Developer
  - Testers
  - Agents

- General resources
  - Computers (Internet, server, Database)
  - Transportation of the road show crew to
  - Depending on technology used: Third party libraries
  - Road show crew

#### Acceptance criteria

- A tested final product that does what it is meant to do
- Ethan Shirto's (Channel Manager) Signoff
- Team leaders of the CRS's signoff
- Successful test with users

#### The project will be accepted as successful when

- An easy to use Application and content that is easy to understand
- IT quality assurance signed off on the technical integrity of the application
- Deployment of the application on internal server
- After the Team leaders of the CRS department have Vetted the product
- 5 agents testing the application for 1 day

#### Limitations & Risk

**Table 1.2: Risk management plan**

Risks	Category	Reason	Contingency
<b>Human resources</b>			
Absenteeism	Mitigate	If not the project will delay and increase cost	Developers will be given the opportunity to work from home and will be requested to not take annual leave during the project. The senior java developer is an integral part of the project so a 6-day reserve (R 13 920) for their cost will be placed on the budget, this will be in case of the project losing them. I estimate 6 days will be enough for another developer to study the code and documentation and restructure the code if necessary, before continuing the development process. These 6 days will also come in where there are any delays in the development process. A 2-day reserve will be placed for the database developer (R 3680) and the UI/UX developer (R 4160), I don't foresee these 2 developers delaying the completion date due to them doing the work during the same time as the server development which takes a longer time. But the 2 days will come in where there are delivery delays for their work
Incapable developers	Mitigate	This will affect the quality of work produced and bring in bugs that will have to be sorted which will increase project time	We will keep constant communication with the IT team leader for them to vat the quality and speed of work. Those developers who are proving to be incapable and/or slow we will monitor closely and at take action regularly including but not limited to removing them from the project. The 6 days for the java developer and 2 days for the database and UI/UX developer reserves mentioned above will act as a cushion if we have to replace a developer. This will give them time to get up to speed

Resignation	Mitigate	If not the project will delay and increase cost	Developers that are selected must have a notice period in case of resignation. This will give us the opportunity to get a replacement developer and get them up to speed with what and how they will be developing. The above-mentioned reserves will come in if the notice period is avoided
<b>Stakeholders</b>			
Channel manger or COO resigning	Avoid	I do not have the power to influence this action. The new person will continue the project once they are up to speed	We will document our interactions to insure that if they are ever unavailable whoever will take their place will have a good idea of what the project is about and where it is
<b>Materials</b>			
System crashes	Mitigate	If not the project will delay and increase cost	We will incorporate the regular use a version control tool e.g. Git, Mercurial, Azure Devops where on each milestone of the development timeline a copy of the app (all the files making up the app so far) is saved on the cloud and in the case of any crashes or corruption of files we can go back to the latest working version.
<b>Financial</b>			
Incompatible technologies	Mitigate	If not the project will delay and increase cost	The development process will stick to tried and tested best practices. In case of any serious misalignments a reserve of R 5604.32 is added to the budget for tools, plugins, advise portals and incidentals.
<b>Activities</b>			
Process change	Avoid	The development does not depend on the content. It depends on the functionality	No action will be taken, this function will be done by the team leaders once the functionality to add process is built.
<b>Financial risk</b>			
Delays in the project	Mitigate	This will result in more costs	An additional amount will be included in the cost of the project which will be used for any delays that could occur

**Assumption and exclusions**

The IT department has enough expertise to develop and deploy the application. They will not be met with major technical heddles that will drastically increase the project time. The project will not involve refinement of the business processes that is the job of management, the project will only interpret their wishes in an easy to understand manner. The implementation of the road show will not form part of this project this will be done through a separate project. This project will only develop a business case for the proposed road show project.

**iv. Revisiting the stakeholder strategy**

There will be an addition of stakeholders from the previous stakeholder list. The addition of the roadshow project manager. They will compile a business case for a project of going to other areas of the bank that are either affected or affect the function in question, and they will run training on the function and the process log (the roadshow however is beyond the scope of this project).



**Table 1.2 Stakeholder Management strategy review**

Stakeholder	Strategy's effectiveness	Example	Changes
<b>Business analyst</b>	The strategy to elicit more support from this stakeholder worked. Particularly the strategy of having a presentation with the business unit COO at the end of the project.	The stakeholder was keen to provide help beyond their function in the project. They offered to rework the business requirements after hearing that there was a change of process however this was not necessary	I would have a mid-project meeting and try to get the channel manager and the COO to attend
<b>COO of the department</b>	Due to there being no need for more support than we got from the COO no action was taken to elicit more support. This is due to having the channel manager as a go between and the COO not concerning themselves with axillary operations at this level	We deal with the Channel manager	I wouldn't change how we interacted with the COO. Except I would try get another mid project meeting with them to encourage the project team and give them an opportunity to present themselves
<b>Channel manager</b>	Due to them being the project sponsor I would change the action to elicit more support from the stakeholder because they had significant interest in the success of the project	The stakeholder has a lot of interest in the success of this project	I would take no action to get more support
<b>Compliance officer</b>	The strategy to elicit more support from this stakeholder worked. Particularly the strategy of having a presentation with the business unit COO at the end of the project.	The stakeholder was keen to provide help beyond their function in the project. They offered to rework the business requirements after hearing that there was a change of process	I would have a mid-project meeting and try to get the channel manager and the COO to attend
<b>Team leaders of segments</b>	Emphasizing the benefit that will come from the project for this stakeholder's worked in getting more support from them. However I realized I didn't need much support from them	There suggestions spoke to the process but the project focused on the system. We were building a system not the process	I would focus less on these stakeholders
<b>Road show project manager</b>	The Road show is beyond the scope of this project, this work only would begin after the project ends. So engaging them during the project was useless they were only needed towards the end of the project	They did nothing during the project and having them around during the project was a waste of their time.	I would only engage them after all the major work of the project was done

<b>Developers</b> UX, UI designer Server Developer Database Developer Testers	I don't think trying to get more support from these stakeholders was the best idea. Their suggestions were complex to understand for the project manager to approve. They almost caused a lot of scope creep in suggesting things that would have increased the size of the project	They ended up suggesting using artificial intelligence (AI) to track what agents search and suggest topics for them to look	I would give them what they need to build and go no further
<b>Agents</b>	The strategy to have meetings with them after a feature has been completed was a good and bad idea	We ended up having meetings to present features that didn't show anything on the screen (technical in nature). But where we had features that they could see and interact with it resulted in a fruitful interaction	I would pick times where we had tangible features that could be demonstrated to the stakeholder
<b>Training facilitator</b> (Additions from previous list )	The strategy to elicit more support from this stakeholder worked. Particularly the strategy of having a presentation with the business unit COO at the end of the project	The stakeholder was keen to provide help beyond their function in the project. They offered to rework the business requirements after hearing that there was a change of process	I would have a mid-project meeting and try to get the channel manager and the COO to attend
<b>SARS/government</b> (Additions from previous list )	We were correct not to try elicit support	SARS is external and changes process through their own process. Lobbying SARS wouldn't be feasible and would be beyond the scope of the project	Nothing would be changed

## v. Decomposition of work

The tools used for the decomposition of work in the project is the WBS, which defined the work that needed to be done and Gantt chart which break down the deliverables into a time based plan that also assigned resources. The breakdown of work was done on a task bases because the tasks are technical, the work done to accomplish the task was not included, this provided enough detail to effectively control the project tasks and gave the technical project team the room to express themselves in dealing with the tasks. Attached as addendums are the WBS and the Gantt chart used in the project.

### Task 2

#### i. Project schedule

The project Gantt chat was used as the project schedule and I will be referring to it (please refer to the Gantt chart at the end of the document). The project was set to take 40.63 days starting from the Mon 20/03/02 to the Tue 20/04/21 the project was completed in 35 days, some deliverables where completed earlier than planned and the project schedule was than adjusted to accommodate the early completion. The table that immediately follows this paragraph tabulates the key deliverables, this table looks at tasks that didn't correspond to the plan, and the variance between planned and actual. The table looks at corrective measures taken for the one developer that went above their allotted time.

**Table 2.1 Project schedule**

Deliverable	Achieved on time	variance	Corrective measures
Server development	The developer completed his task early	5 days early	None
UX Design	This task was almost delayed. The developer was not developing at a pace that was enough for him to finish at the time allocated	None	The developer was replaced by someone with more experience in UX design and this person advanced through his deliverable faster and he meet the original deadline

All other tasks where completed (rather delivered) on their deadline dates. Please refer to the Gantt chart at the end of the document for all tasks

#### ii. Communication strategy

**Table 2.2: Communication strategy changes**

Stakeholder	Used strategy	Different strategy	Reasons
Developers	A meeting once a week to get their progress	2 time a week	So as to pick up developers that are incapable quicker
Agents/users	Communicate with them after the completion of a feature	Communicate with them after a tangible feature is completed	They don't understand the technical features as they do tangible features. They are in the organization's operations and to many progress meetings will disturb organizational operations
Channel manager	Halfway through the project	Once a week	At the halfway mark the project has been going on for same time and the channel manager comes with a lot of expectations which sometimes are not yet fulfilled in the project

### iii. Budget

Description	Budgeted	Actual	Variance	Corrective action
Appoint business analyst	R6 505.68	R6 505.68	R0.00	None
Content developer	R1 920.00	R3 792.00	-R1 872.00	We tapped into the project reserves to carry this cost
Security libraries and plugins	R1 500.00	R1 200.00	R300.00	This amount was added to the reserves amount
Server developer (Java developer)				
· Senior developer	R58 000.00	R23 200.00	R34 800.00	This amount was added to the reserves amount
· Junior developer	R28 000.00	R11 200.00	R16 800.00	This amount was added to the reserves amount
Database developer	R9 200.00	R5 520.00	R3 680.00	This amount was added to the reserves amount
Internal server hosting (main application)	R400.00	R400.00	R0.00	
cloud storage	R540.00	R400.00	R140.00	This amount was added to the reserves amount
Content delivery network (CDN) hosting	R250.00	R250.00	R0.00	
Software testers	R960.00	R1 920.00	-R960.00	We tapped into the project reserves to carry this cost
UI & UX developer	R35 360.00	R47 360	-R12 000	We replaced the previous developer for his slow place, we tapped into the reserves as well

#### iv. Team performance feedback

##### Team member feedback

- Server developer:
  - **Expectation:** You were expected to tie all the pieces of the application together (the database and the frontend). You were expected to build the system logic that performed as desired. Your work was expected to follow best practices in your industry
  - **Observation:** You exceeded expectations in the way you accomplished your tasks. The use of a framework was a brilliant step which saved the project time.
  - **Assessment:** You showed a lot of innovation in your approach to this project.
  - **Consequence:** You have set the tone for any future web-based project with your use of the framework. We will be implementing the framework in future projects
- 1<sup>st</sup> Frontend developer:
  - **Expectation:** you were expected to design and produce a user experience that was easy and simple, as well as a user interface that fit the organization's brand. You were expected to analyze and respond to the feedback from the users in your approach
  - **Observation:** inexperience got the better of you in this project, you failed to manage your time effectively to keep up with your deliverables.
  - **Assessment:** Your work is good you have the aptitude for UX/UI design and development. However you need to work on your time management and your reaction to unforeseen events
  - **Consequence:** Unfortunately it is with regret that the decision has been made to let you go from the project. Your contribution is greatly appreciated.

#### v. Re-examine risk plan

The following are the risks that either were seen and planned for unsuccessfully or were not seen and their effect on the project.

**Table 2.3 Risk plan examination**

Risk	Foreseen or not	Contingency plan	Effectiveness of plan
Incapable developers	Yes	The plan worked but the reserve for this risk was small. Money needed to be taken from other activity reserves	The plan would have been completely effective if we calculated the reserve amount well

The effectiveness of the Contingency plan that formed part of the risk management plan were not tested, the risk did not occur. No other risks occurred

### Task 3

#### i. Table 3.1: Objectives verses outcome

Planned objective	Outcome	Reasons
A working, easy to use browser-based web application.	This objective was met before the time planned and it worked as expected	The server developer used a web framework which produces stable web apps faster and with less effort
A business case for a roadshow project that will precede this one	The Business case was successfully produced.	All the information gathered during the project was used to compile it
To complete work within 40 days	The project work was completed in 35 days	The server developer used frameworks that sped up the work from 29 days to 24 days

#### ii. Handover of functions report

##### 1. Actions going forward

Action	when	Expected outcome
Meeting between developers and project sponsors	3 months after app goes live	Developers will be provided with desired upgrades from the project sponsor if there are any
Agents and developers meet	Once a month for the next 3 months	Agents will brief developers on any bugs on the system
The system will be offline for 1 day as its logs are examined for any bugs	1 month after the App goes live and again after any fixes are affected	Bugs in the system are brought to the attention of the relevant developers

##### 2. App functions list

These functions listed are the major functions a detailed specification document will be provided to the department

- **New processes:** To create a new process you click on the 'New' button that is on the top right corner. Once on the new process screen you use the plus (+) button to add new steps to the process and click the 'image' button to add an image that link to a step.
- **Edit process:** To edit a process click on 'my processes' button (only available for managers and team leaders). Click the 'edit' button next to the listed process. You will be taken to a form that will allow you to edit the process.

- **Delete process:** navigate to my processes and click delete next to the listed process and confirm you desire to delete

**3. Password and login information.**

Passwords will be given individually, when a user gets their login details they must change their password to a secret one.

**4. Handing over to**

This app is being handed over to Ethan Shirto in his capacity as the department channel manager

**5. Useful contacts**

System support department

Number: 087 653 5552

The department will provide all system support for any issues faced on the system

**iii. Project performance evaluation**

Please see attached a Project Performance evaluation

**iv. Lessons learned**

Please see attached presentation slides



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