**Task 1**

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* **NAEDO**:
  + This was a telephonic campaign where we introduced and contracted with clients to change from a normal debit order to a NAEDO debit order. This debit order goes off only when there is money in the account.

This NAEDO terms and conditions are a page long and these must be read to the client, if the client has a question on a term, you must be able to explain in a simple way.

This campaign was running through a spreadsheet not the normal system we use. So as an agent I must copy and paste the account identifying number from the spreadsheet onto the system and search for the account. Once I find the account, I must contact the client, and ensure I follow a script.

If the client agrees to the NAEDO debit order I must populate a mandate form and send it to the client.

* **New Accounts:**

The system would generate a different work item to accommodate client responses. In this project I had to move account that had responses in them to a Reply received queue. The response we want is a response with a CRS form which allows us to remediate the client. So, after allocating work items to myself I had to open each one and see if it was a response with a CRS form or merely a response (enquiry, out of office, non reply etc). If it is a response with a form, I would download the form and then upload it to a system that holds forms (Sigma). Once the form is uploaded, I would need to search for the original work item and shift it to the reply received queue, and then I go back to the item I started with to junk it.

* **High Risk:**

In this project we needed to update a client’s KYC documents, particularly we needed a client’s ID, proof of residence and a source of funds document.

The clients we deal with in these campaigns are considered high risk because they either politically exposes people of prominent people, so there is pressure not to make mistakes.

After accounts are allocated to me, I would open the accounts and see if the client has the above-mentioned documents on our system. If the client has responded with these documents, I would upload them to Sigma. Failing that I would have to call the client and request these documents. Depending on previous contact I would send the account to be frozen if by the end of my attempt I did not acquire these documents.

**Task 2**

1. –
2. **Initiation phase:**

In this phase the project objectives are identified which will most probably be a solution to a business problem or taking advantage of an opportunity. Information is gathered, generated and evaluated to better understand the business needs. In this phase a business case is produced which looks at the business needs and proposes a solution, in order to justify the need for the project. To aid decision makers a feasibility study can be produced, this study looks at project goals, timelines and cost to see if it will be a sensible course to start the project.

Once the recommended solution outlined in the business case is approved, a project is initiated, and a project manager is appointed, project deliverables are drawn up, stakeholders (participating work groups) are initially identified. The output of these activities is approval to move into the next phase which is the planning phase.

1. **Planning phase:**

In this phase detailed planning takes place, it is in this phase that the following are articulated in a clear and detailed manner to serve as a guide in the implementation phase

* + **Project schedules and deadlines**: Gantt charts can be used in this part to break down how the work will be done though time (scheduled).
  + **Team composition:** competent people are identified who can fulfil goals of the project and these people are grouped to form teams.
  + **Roles and Responsibilities of project team members**: Work breakdown structures (WBS) are produced and from these people are assigned to tasks of the WBS
  + **Budgets**: All project process will carry a cost and these processes must be incorporated into a budget to guide the project finances
  + **Equipment and tools that will be needed during the project:** in this part resources are allocated to parts of the project
  + **Project workflow**: A guiding document that defines the sequencing of activities, responsibilities, data that must be exchanged or completed for the project to progress

Milestones inform the project manager how much and the type of resources must be released to a part of the project. An example of this phase in a transportation company is planning the route, calculating the cost of the diesel, assigning a driver, assigning a vehicle etc.

1. **Implementation/execution phase:**

In this phase the work that the project is made up of begins this, the end of this phase will result in what the project aimed to achieve. During this part the guides produced in the planning phase are used as controls of the project and help monitor the progress of the project. In our previous example of a transport company this part would be where the goods are loaded in the vehicle and the tyres hits the road to the delivery address

1. **Closing phase:**

In this phase the project manager happens after the execution phase and analysis what went well and what did not and why. In this phase the project manager will look at the following:

* Are all deliverables realised
* All aspects of the project completed
* Evaluation of project member’s performance during project
* Send reports to stakeholders

1. **–**
   1. **Project Integration Management:**

The coordination of all the project elements and in term getting sight of the project’s tasks, resources, stakeholders and other project elements.

* 1. **Project Scope Management**

This involves getting an overview and defining the work that needs to be done to achieve deliverables. Through controls and monitoring track, approve or disapprove activities which are previously documented while defining the work and monitor that these planned for activities are not disrupted (scope creep). After all the work has been done and the outcome has been achieved, close the project by examining the project deliverables and an assessment of the outcomes against the plan

* 1. **Project Communication Management**

This process looks at ensuring timely and appropriate communication to aid the project’s planning, creation, collection distribution, storage, getting, managing, monitoring, controlling of the project information and data.

* 1. **Project Time Management**

This process involves analysing and developing a project timeline, which aids in tracking when project deliverables are due. A project Schedule is developed, it orders activities in a way to maximise the use of resources, minimise barriers

* 1. **Project Cost Management**

In this process all the project’s costs are planned, estimated, managed, monitored, and controlled to ensure the project completes within budget.

* 1. **Project Procurement Management**

The creation of relationships with outside suppliers of resources that can help the project reach its goals. This process is divided into the following parts:

* + - Planning: creation of a procurement plan, this looks at which items are internally sourced and those externally sourced.
    - Selection: Compare vendors, procurement contracts are drawn up and vendors are selected.
    - Administering: manage relationships with vendors
    - Closing: closing procurement contracts, evaluating the strengths and weaknesses of the relationship for the benefit of future projects.
  1. **Project HR Management**

Compiling a human resource management plan which speaks to the: Assembling project teams, lead the project team, tracking their performance, providing feedback, resolving problems, optimising their environment to maximise performance. In this process you identify project roles, responsibilities, required skills, reporting structures to ensure the project has the best people

* 1. **Project Risk Management**

Involves the Creation of a plan to minimise potential risks (any unexpected event that could affect the project’s processes, human resource, resources) after analysing and identifying these risky areas of the project. This insures the project remains on track.

* 1. **Project Quality Management**

This process seeks to ensure that what is produced by the project is of highest quality. It ensures that quality is maintained in project deliverables. It also speaks to qualify in the activities of the project.

**Task 3**

1. -
   * Project Plan
   * Controlling
   * Leading and manage the project
   * Project schedule
   * Assigned tasks
   * Good communication channels
   * Organisation
   * Feedback and Motivating
2. – Sync with home version
3. The project team:
   1. It is the team which consists of internal and external people, working full time or part time that curries out most of the project work. The specific activities of the project team are project specific and can include:
      1. Carrying out work to achieve individual deliverables
      2. bringing their expertise and contributing to the overall project
      3. They interact with users
      4. Reporting on the project process
      5. Manage the project team
4. It is a disagreement between people which could stem from a difference in opinion among other things. An example of conflict is when a team member believes they possess a skill they don’t have e.g. Sales. Having to frankly tell them that they are not as good as they think, could develop into a conflict situation if the member refuses to accept what you are saying and are unyielding in their “ability”. This conflict particularly happens where no assigned roles exist in the team, to prevent this requires assigning roles and responsibilities to the right people.
5. Stake holders are categorized according to the powe, influence and interest in the project:

* Category 1: In this category are influential people with the most interest in the success of project. It is people in this group that you must satisfy, update regularly people that fall in this category:
  + Shareholders
  + Project sponsor, manager and board
  + investors
  + project manager
* Category 2: In this category are the leaders with less of an interest in the project. They will not be as impacted by you project but have influence over the project. This category must regularly be updated and allow them to air their opinions. People in this group:
  + Managers
* Category 3: in this category are people you need to keep informed, they have less influence, people in the group:
  + Users
  + Suppliers
* Category 4: these are people you need to monitor, they don’t have as big an influence or interest in you project. You need to monitor them to insure they are not affected by the project
  + Government

**Task 4**

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| --- | --- |
|  | * 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 |
|  |
| * Email is cluttered by system updates and organisation’s news * Email being used to communicate process changes * Target driven environment (no time to check emails) |

**Problem Identified**: The department I work in has a communication issue, information is not consistently distributed to everyone in a manner that ensures that everyone, gets an opportunity to view it, internalize it and eventually put it to practice. Most of information that fellow agents have is from other agents in the same position as them. Email in our department is not a primary means of communication emails that come in are mostly system updates and company-wide news this has led to a culture of ignoring email notifications this also exacerbated by a target driven environment, agents don’t have time to check emails.

The problem is that process alterations from managements are also sent through the same channel. Most agents, me included, only get to emails later in the day so we don’t always have the latest processes, this essentially renders our management less effective in controlling what and how things are carried out.

The department needs a better way to communicate process, a way that will ensure that all everyone has access, a way that is simple and that allows management to monitor and ultimately alter the information.