Please note: I will be drawing from the project I have consistantly been refering to throughout the course. This project has not been implemented so I will be writing this asssignment as though it has

**Task 1**

Problam identified :

**Proposed solution**

Being a client facing function that we fullfill at my place of work, we faced with a vary critcal and potentially detrimantal problem to the organasation. We have an ever changing proccess that it becomes difficult to all mantian a consistancy in our interaction with clients. Due to these inconsistancies clients end up having to perfom 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 my 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.

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** * **Departments carry out their own functions around the same function** * **Clients end up feeling like we running a schame** * **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 hasient to approuch their team leaders * **This function is not standardised across the whole bank** |

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 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

ii.

The scope statement is missing the function of making other departments aware of this function and incorraging them to use the Process Log as a reference for this function. Proccess log will be a cheap and effective way to synchronise all these departments around the function

## 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 not part of the scope of the current project). 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.
* **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 crew:** Additions from previous projects, they will be visiting the various departments that affect or are affected by this function and giving them the context of the function and presenting the process log
* 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)
  + Transportatoin of the road show crew to
  + Depending on technology used: Third party libraries

### 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

Please refer to Task 3 of this assignment the table named Risk management plan would go here

### 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.

iii.

There will be an addition of stakeholders from the previous stakeholder list. The addition of the roadshow crew. These are individuals that will go to other areas of the bank that are either affected or affect this function

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stakeholder** | **Impact/ Influence** | **Support** | **Attitude** | **Tactic to increase support** |
| **Business analyst** | The business analyst must interpret the businesses needs and policies and draw parameters to which we will develop the application. Their findings will have an influence on the project | They will help refine the information that can be included on the Process Log | They have neutral feelings towards the project. This is their daily function so nothing sets this project apart | I will elicit suggestions on how to improve the process the project seeks to help. I would than give them feedback on where and how their suggestions were incorporated. I would refine the channels of communications between us during the actual development and invite them to meetings with the COO where they could get an opportunity to network at that level |
| **COO of the department** | They have an impact and influence in that they ultimately run the department with the Channel Manager (CM) as their proxy and the CM can cancel the project if they see no value from it. However they don’t use this influence | They act through the channel manager | They act through the channel manager | There is no need to increase support as our primary focus is the channel manager |
| **Channel manager** | They Are the project sponsor and have a huge impact on the project. But they leave the implementation to the Project manager so they exert little influence on the project | They provide support of accessing resources | They want the project to succeed as it will improve the operations of their department | They have a significant interest and a keenness to support the project. All that is needed is preparing a good presentation of the project at the halfway mark meeting and be ready with detailed information if they ask questions |
| **Compliance officer** | The compliance officer must interpret the CRS Regulation and analyze whether the current process is within the Regulation so that it can then be incorporated into the app. They would have to approve the information that makes it onto the app | They will help refine the information that can be included on the app | They have neutral feelings towards the project. This is their daily function so nothing sets this project apart | I will elicit suggestions on how to improve the process the project seeks to help. I would than give them feedback on where and how their suggestions were incorporated. I would refine the channels of communications between us during the actual development and invite them to meetings with the COO where they could get an opportunity to network at that level |
| **Team leaders of segments** | Team leaders will be the go between, between the business analyst, the training facilitator and the agents/users of the project | They will be involved in interpreting the Agents/Users information and the business requirements on an ongoing bases and will communicate any business process changes as development proceeds. | They are not as keen due to the amount of work that they do on a daily bases already. This project adds more responsibility on them. However the product will eventually assist and relieve the pressure from taking agent’s inquiries. | We will emphasize the proposed benefit the project will have in the long run e.g. agent inquiries will be directed to the app relieving, pressure on them. |
| **Developers**  UX, UI designer  Server Developer  Database Developer  Testers | They have the most impact on the project as they are the people who will be building the system. Their performance will be directly linked to success or failure of the project. They however do not have a lot of influence on the direction the project takes as they only build the app | They will be building the app, writing specifications for any future maintenance for other programmers. They will be very important during the project | They are not as invested in the project as they will only be doing their job within the organization. The App is not one that will get them noticed or win them any prices within the organization given the size of our department | I will elicit suggestions on how to improve the process the project seeks to help. I would than give them feedback on where and how their suggestions were incorporated. I would refine the channels of communications between us during the actual development and invite them to meetings with the COO where they could get an opportunity to network at that level |
| **Agents** | They will be users of the App at the end of the day. Their input will be very important. They will have little influence but a big impact: if this app is not friendly and effective to and for them it would have been a big waste of time | The App is for them so their participation will be needed they will not however offer much in terms of support | They keen on the final product as it will consolidate the knowledge in their space and will reduce them having to go on scavenger hunts for process information | We will hold meetings with them to show them progress and elicit any suggestions from them |
| **Training facilitator**  (Additions from previous list ) | They will draw up a simplified document of the information that will be part of the app. They will interpret complex ideas so their simplification will affect the effectiveness of the product | They will help structure the information which will feature in the project. | They have neutral feelings towards the project as they doing their jobs | I will elicit suggestions on how to improve the process the project seeks to help. I would than give them feedback on where and how their suggestions were incorporated. I would refine the channels of communications between us during the actual development and invite them to meetings with the COO where they could get an opportunity to network at that level |
| **SARS/government**  (Additions from previous list ) | They have a huge impact and influence on the process and their amendments of their processes will have a direct impact on our process | They issue amended regulations that will be on their website and passed to the organization’s compliance officers which informs the process | They do not even know this project exists so they have no feelings towards this project | We do not need an increased interest on the project from them so nothing will be done in this regard |