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

**Task 1**

**Problem identified**

Being a client facing function that is being fulfilled at my place of work, we faced with a vary 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.

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** |

ii.

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 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.
* 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**: Additions 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 3.1: Risk management plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Risks** | **Category** | **Reason** | **Contingency** |
| **Human resources** |  |  |  |
| Absenteeism | Mitigate | If not the project will delay and increase cost | Developerswillbe 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 |
| **Stakeholders** |  |  |  |
| 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 |
| **Materials** |  |  |  |
| 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**.** |
| **Financial** |  |  |  |
| 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. |
| **Activities** |  |  |  |
| 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. |
| **Financial risk** |  |  |  |
| 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 brief for the new road show project.

iii.

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 this function, and train on the function and the process log (this function however is beyond the scope of this project).

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder | Strategy’s effectiveness | Example | Changes |
| **Business analyst** | 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 |
| **COO of the department** | 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 |
| **Channel manager** | Due to them being the project sponsor I would change the lack of action to elicit more success 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 | No changes |
| **Compliance officer** | 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 |
| **Team leaders of segments** | 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 to 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 |
| **Road show crew** | The Road show crew should have beyond the scope of this project, Because their work only would begin after the project ends. | They did nothing during the project and having them around was a waste of their time. | I would have prepared a brief for a road show project to be implemented after the process log project |
| **Developers**  UX, UI designer  Server Developer  Database Developer  Testers | I don’t trying to get more support from these stakeholders was the best idea. Because they suggestions where complex to understand, and approve by the project manager. They almost caused a lot of scope creep in suggesting things that would have increase 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 respectfully give them what they need to build and go no feather |
| **Agents** | 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 | I would pick where times where we had features that could be demonstrated to the stakeholder |
| **Training facilitator**  (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 |
| **SARS/government**  (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 | Nothing would be changed |

iv.

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 3

|  |  |  |
| --- | --- | --- |
| **Planned objective** | **Outcome** | **Reasons** |
| A working, easy to use browser-based web application. | This objective was meet before the time planned and it worked as expected |  |
| A business case for a roadshow project that will precede this one | The Business case was successfully produced. |  |
| 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 |

1. Handover of functions report

### 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 |

**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

### 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.

**Handing over to**

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

### Useful contacts.

System support department

Number: 087 653 5552

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

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