Document Delivery Pilot Project

Part 1 - Case Problem Information

The Big Store (hereafter referred to as TBS) is a small Canadian print shop, based in Niagara, Ontario, with more than 20 stores nationwide, in all Canadian provinces, and two territories, employing more than 200 people overall.

The company has been very innovative in their business practices, and now they covertly considering even a newer concept – delivering document and store items using a specialty third party bicycle company.

The concept is not new – a small firm named DroneExperts in Toronto, Ontario, (hereafter referred to as DE) announced the concept in 2019 and they are looking to develop a relationship with a partner to launch the concept into reality. TBS may be the big break they are looking for.

Mike the president of TBS wants to develop a pilot project to get something moving and see how it works. Mike will provide the funds and will oversee all aspect of this initiative. Mary is the project lead on the business operations side who will manage the project for TBS. Mike has made an agreement with the CEO and founder of DE, Kevin, to prototype this project in Toronto Ontario, the home location for the DE organization where it developed the system. DE will customize its systems, interfaces and business processes to conform to TBS project requirements.

Your Team, who works at TBS internal IT Department, has been assigned by the company's CIO, to lead the project in terms of the information systems that will be needed to support the initiative. Peter is the project manager at DE, who will work with your team. Generally, from the IT perspective, the project will likely have to accomplish the following:

- Develop TBS online order entry system modification that will allow customers in Toronto, Ontario, to register their willingness to have a bicycle courier, deliver their orders by means of online entry or smartphone entry. There will be significant restrictions on the approval of customers for this service, so there will be need for a segment of the system to allow TBS management to approve the customer, send a confirmation to the customer, and so on.

- Create reports for TBS's management, regarding sales information, customer reactions, and key project performance indicators, as defined by senior management.

- Create electronic messages for the customers through email, online notifications, or mobile alerts as the customer prefers.

- Interface to the DE Corporation for its order entry, delivery confirmation and mobile application software. Ali is the point of contact on the information systems side with DE and will be overseeing the team on their side. A price for this customization is not yet determined, and the development of this proposal will be part of your project plan.

- Develop security options for all systems that will safeguard the data as it is stored within your company, and as it is exchanged with DE. You will work with TBS's information security management team to achieve this, and Bill is the project lead on that team for this project.

- You will need to identify basic requirements and then determine your team members from the list of people given in this document as you move towards final project planning.

- It has been determined that only four (4) TBS stores in the Toronto Ontario area will participate in the prototype delivery system. The are in a relatively close geographic area to one another, and they are in a non-urban environment, consisting mainly of suburban homes, and small businesses. Consumers in apartment buildings will not be permitted in the prototype project due to delivery issues.

TBS will not be required to purchases any new hardware, servers, workstations, or other network infrastructure for this project, as all of that is only on DE side, and they will be including it in their proposal and a separate project plan that they will give you as a part of their contract. TBS can accommodate this prototype system within their existing infrastructure that handles customer orders. Ongoing system maintenance scheduling or planning after the prototype is implemented will not be part of the project schedule or plans – you will be developing that plan separately once the system design is known.

TBS has allocated a maximum of $500,000 for this prototype project. You have been asked by your CIO to ensure that your project does not go over this figure, and if possible, that the total project cost is under that amount. The two companies agreed that they would like to begin the project on the on next February 5, and their first customer delivery flight should take place no later than December 30 to avoid harsh weather in Ontario.

Of course, you also need to include specific steps and processes for:
- Regular meetings with the team, stakeholders, and the cross-impacted areas of the company
- Approval points as needed through the project sequence
- Points at which you refine cost and staffing requirements (you should not need to calculate costs or total staffing at this point)

- Points at which you will produce the various project documentation deliverables (discussed in class)
- Testing, quality control, and provision for issues that may develop
- User training and other preparations for system implementation. The TBS change management team, headed by Shirley, will assist you in this effort.

Summary of personnel involved in the project

1. **DroneExperts Corporation Staff:**

- Kevin, CIO and founder
- Peter, Project Manager - main point of contact
- Stephanie, Senior Business Analyst
- Gerald, Senior System Engineer
- Ali, Project Lead IT Systems

2. **The Big Store Staff:**

- Geoff, Operations VP
- James, CIO
- Mary, Project Lead, Business Operations Team
- Bill, Project Lead, Security Team
- Julie, TBS Manager, West Toronto
- Jamal, TBS Manager, East Toronto
- Steve, TBS Manager, North Toronto
- Wilma, TBS Manager, South Toronto
- **Your Group**, Project Manager
- Marianne, Business System Analyst
- Johnny, Programmer
- William, Senior Programmer
- Cherry, Database Administrator
- Linda, Reports System Programmer/Analyst
- Gerald, Testing Specialist
- Elizabeth, Senior Testing Specialist
- Shirley, Change Management Coordinator

Part 2 - Project Scheduling Information

The project scheduling information provided in this part, should be added to the problem information provided in part 1.

1. Total project cost must not exceed project constraints. Project schedule should begin February 5 and should meet the schedule constraints as per the case information for completion. You should assume 100% allocation to this project for each resource in the list below. Load leveling is NOT required for this assignment, and over-allocation warnings on your WBS will not be counted as a problem if the resource effort allocation is reasonable.

2. It is critical that your assignment WBS is specific to the case problem in detail. You must ensure that all required deliverables appear in your WBS specifically, and that each includes design development, testing and implementation as appropriate. Your WBS must include Project Management steps for the charter/scope, risk management, WBS, schedule, training, and the required meetings to conduct and manage the project. Do not includes things like "procurement management plan" or "staffing plan" or "quality management plan", as these are not a part of this case problem. A generic WBS is not acceptable for this assignment. This is a practice for you to see how you might deliver such a detailed schedule for this case problem, and it will be evaluated that way.

3. It is advisable that you add the Project Management, Communication, Testing, and Training tasks as needed to make the project successful. Use in the information in the case, along with your own ideas, about how much effort is involved to ensure a quality implementation overall throughout the project. Be sure that you do not exceed the project constraints.

4. Remember that this project will be tight in terms of time and cost, so do not include steps that are not necessary. You should schedule the project from the beginning, including charter/scope, planning meetings, risk management and communications management plan development, WBS and schedule development – these items need to appear along with resource assignments and the appropriate costs that go with them.

5. Finally, you are required to indicate appropriate quantity of tasks that have been already in progress or completed. Assume that we are looking at your schedule on June 27. Show which work packages would probably be at what stage of completion by this specific time in the schedule. Use you own judgement based on the work package finish dates but be reasonable.

6. The personnel involved in DE corporation do not have billing rates per hour because their cost is being absorbed by the fixed fee specified in their proposal below. These people should be listed in your resource sheet, but with $0.00 standard rate, and they should be assigned to the appropriate tasks for the project.

> Kevin, CEO and Founder
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> Peter, Project Manager and Main Point of Contact
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> Stephanie, Senior Business Analyst
>
> Gerald, Senior Systems Engineer
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> Ali, Project Lead IT Systems

They should be assigned to the project tasks as appropriate using the information in the case and the details below:

DE Corporation Contract Fees and Dates

TBS has signed a contract with DE specifying the following phased payment plan that is linked to specific dates or deliverables. You are responsible for ensuring that the payments occur on time but are only made if the appropriate conditions have been met. Be sure to include the necessary tasks in your WBS to accommodate evaluating, and paying for, these contract activities.

Total DE fee for customizing order entry, delivery confirmation, and mobile application software to TBS specifications, with payments to be received as follows:

Project Initiation	$30,000
After TBS approval of DE Design Phase	$30,000
After successful demonstration of entry module	$30,000
After successful demonstration of delivery confirmation module	$30,000
After successful demonstration of mobile module	$30,000
After production system test approval by TBS	$50,000
After successful implementation sign-off by TBS	$50,000
Final payment 1 week after successful implementation sign-off	$100,000
TOTAL	$350,000

TBS Staff - Internal Effective Hourly Rates

Geoff	$200/hr
James	$150/hr
Mary	$50/hr
Bill	$50/hr
Julie	$60/hr
Steve	$60/hr
Jamal	$60/hr
Wilma	$60/hr
YOUR TEAM	$55/hr
Marianne	$45/hr
Johnny	$40/hr
William	$52/hr
Cherry	$55/hr
Linda	$38/hr
Gerald	$38/hr
Elizabeth	$49/hr
Shirley	$38/hr

TBS Effort Hours

The following is the estimate TOTAL EFFORT HOURS for only the software programming and reporting to the customer and TBS management for the prototype systems. These do not include design requirements, project management activities, testing, training, final implementation, or meetings – you will need to add estimates those additional steps.

TBS Inventory Management system modification	100 hours
TBS Customer Database System Modification	100 hours
DE General Interface – TBS side system	50 hours
Website Contents Update – TBS Side	75 hours
Customer/Management Reporting	35 hours
Store Management Reporting	35 hours
Credit Card Processing	75 hours
TBS Sales Management Reporting	50 hours

You need to determine who on TBS's and DE's staff should be involved in the various deliverables based upon your best judgement, and how their positions relate to the tasks.

END OF CASE PROBLEM