Project Closeout Report: Operations & Training Plan

Status: **Draft**

Date: 09-09

Author: Project Manager

| Project Sponsor | Operations Director |
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| Project Team | Financial analyst, Fulfillment Director, HR Specialist, Quality Assurance Tester, Customer Service Manager, IT Manager, Inventory Manager, Training Manager |
| Project Duration | March 1-September 6 |

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# Executive Summary

# This project aimed to set up the working systems and processes for Office Green’s new Plant Pals service. The team created a delivery strategy, set up supply chain management tools and machinery, and ran a training program for employees. Although the project cost a bit more than planned, it finished on time. However, there are still problems with completing orders and keeping customers happy that need to be solved.

# Key Accomplishments

* Established plant delivery and logistics plan that brought delivery costs down by 50 cents per unit
* Selected and installed supply chain management software and equipment, which helped speed up plant procurement and sourcing
* Trained over 75% of employees before the service launch, boosting efficiency
* Installed new software to manage incoming orders, making the ordering process more efficient
* Sent test batches to customers to refine product quality and delivery protocols
* Ran an ongoing customer survey to gather information on customer satisfaction
* Implemented feedback from customer surveys, increasing on-time deliveries by 10% and satisfaction with customer service by more than 42%
* Implemented operations for Plant Pals service launch, creating a stable revenue stream

Lessons Learned

*What went well?*

* Implementing the plant delivery and logistics plan effectively reduced costs.
* The training program successfully educated 75% of the employees on the new service procedures and standards, enhancing efficiency.

*What went wrong? How did you resolve the issue?*

* Due to a lack of established protocols, 10% of the plants were planted incorrectly. This issue was rectified by implementing standardized potting procedures.
* By employing additional drivers and reevaluating delivery routes, on-time deliveries improved from 80% to 90% during the pilot phase.
* The customer service team faced challenges with their software, which hindered their ability to address customer complaints efficiently. However, an IT Specialist swiftly resolved this issue.

# Open Items

* Keep tracking outcomes for further enhancements.
* Persist in refining delivery methods to achieve our 95% punctuality goal.

# Next Steps and Future Considerations

* Assign additional drivers to earlier shifts to align with customers' preferred delivery times.
* Going forward, make sure planting and delivery operations comply with company standards.
* Increase resources dedicated to customer support to reduce complaints.
* Establish a continuous training program for employees focusing on product quality, delivery, and customer service best practices.

# Project Timeline

| March 1-April 9 | Established a plant delivery and logistics plan |
| --- | --- |
| April 12-April 30 | Selected & installed supply chain management software and equipment |
| May 3-June 11 | Trained over 75% of employees before sending out test batches |
| June 10-15 | Installed software to manage incoming orders |
| June 21-August 16 | Sent test batches to customers |
| June 21-July 19 | Conducted a customer satisfaction survey |
| July 5-July 30 | Implemented feedback from customer satisfaction survey |
| September 5 | Implemented internal operations for the official service launch |

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# Resources and Project Archive

* [*Project Plan*](https://docs.google.com/spreadsheets/u/0/d/1KkyuVLpbtfv9CKZS0aJ76xVlV_Bf6iAwdgCYqBw_4fI/edit)
* [*ROAM Analysis*](https://docs.google.com/spreadsheets/u/0/d/1HgQ9pKyP39qnzb7CEtcjc92V1EEOZ_6YgyGzdzyUTxo/edit)
* [*Status reports*](https://docs.google.com/document/d/1czr6641FA9ilxHooa50embTYEH1wuuWFI_0p4ayQ5Zg/edit)
* [*Escalation email*](https://docs.google.com/document/u/0/d/1czr6641FA9ilxHooa50embTYEH1wuuWFI_0p4ayQ5Zg/edit)
* [*Presentation of customer feedback*](https://docs.google.com/presentation/u/0/d/1GgACH3WeMQFyOzJzgN6pyhqZJ8yrEFwjOiF8vvJ2dHw/edit)
* [*Relevant meeting agendas*](https://docs.google.com/document/d/18Fay2jdN9ZkYMXNOkwrGjuVjRGQZpMVYsSiykF6dbQY/edit?resourcekey=0-qb_8g-6DRKBnIf_4vHiV0w)