# Project Management Plan

**Project Title:** Vertriebscontrolling Database Project

**Date:** 14.Sept.2025

**Version:** 1.0

## 1. Project Overview

### 1.1 Purpose and Justification

The project will create a centralized SQLite/SQLAlchemy database in Python to consolidate data from SAP, Cognos, MicroStrategy, and Salesforce. It will automate ETL processes, reduce manual effort, and serve as a single source of truth for Sales, Distribution, and Partner Management.

### 1.2 Objectives

- Build centralized database with input, mapping, and output tables.
- Automate ETL using Python.
- Consolidate SAP, Cognos, MicroStrategy, Salesforce extracts.
- Deliver standardized Allianz, Vermittler, Banken, Broker reports.
- Provide ad-hoc query support.
- Enable Power BI dashboards for analysis.

### 1.3 Business Benefits

- ≥40% reduction in manual reporting effort.
- Improved KPI consistency.
- Flexibility for ad-hoc requests.
- Transparency via shared data definitions.

# 2. Scope Management

## 2.1 In Scope

- Database setup with SQLite/SQLAlchemy.
- Python ETL pipelines (ingestion, cleaning, transformation).
- Integration of SAP, Cognos, MicroStrategy, Salesforce extracts.
- Input, mapping, and output tables.
- Power BI dashboards.
- User documentation and training.

## 2.2 Out of Scope

- Real-time integrations (batch only).
- Predictive modeling and advanced analytics.
- Source system configuration changes.

## 2.3 Deliverables

- Requirements documentation.
- Database schema (ERD) and table definitions.
- Python ETL scripts.
- Output tables (Allianz, Vermittler, Banken, Broker).
- Power BI dashboards.
- User manuals and handover documentation.

# 3. Schedule Management

## 3.1 Work Breakdown Structure (WBS)

- Initiation & Planning → Requirements, documentation.
- Design → Schema, mappings, ETL framework.
- Development → Input/mapping tables, ETL scripts, output tables.
- Reporting Layer → Datasets, Power BI dashboards, KPI validation.
- Testing → Unit, validation, UAT.
- Deployment & Rollout → Database deployment, access setup, go-live.
- Training & Closure → Training, handover, closure report.

## 3.2 Timeline (5 months)

| Phase | Duration | Timeline |
|---|---|---|
| Initiation & Planning | 3 weeks | Month 1 (Weeks 1–3) |
| Design | 4 weeks | Month 1 (W4) – Month 2 (W3) |
| Development | 6 weeks | Month 2 (W4) – Month 4 (W1) |
| Reporting Layer | 4 weeks | Month 4 (W2–5) |
| Testing | 3 weeks | Month 5 (W1–3) |
| Deployment & Rollout | 1 week | Month 5 (W4) |
| Training & Closure | 1 week | Month 5 (W5) |

# 4. Cost Management

No external costs. Internal resources only. Existing Python and Power BI stack will be used.

# 5. Quality Management

## 5.1 Quality Objectives

- ≥99% data accuracy.
- Consistent KPIs across teams.
- Reports within 2 days post month-end.

## 5.2 Quality Assurance

- Data validation in ETL scripts.
- Comparison with legacy reports.
- User workshops for KPI verification.

# 6. Resource Management

## 6.1 Roles & Responsibilities

- **Business Analyst:** Requirements, mappings, ETL collaboration.
- **Data Engineers:** Build ETL, design schema, validation, scalability.
- **Controller:** Define KPIs, validate reports.
- **BI Analyst/Power BI Developer:** Dashboards, ad-hoc views, usability.
- **IT Security & Infrastructure:** Access rights, compliance, backups.
- **End Users:** Feedback during UAT, report validation.

# 7. Communication Management

## 7.2 Tools

- MS Teams for updates, sharing, and workshops.

# 8. Risk Management

## 8.1 Risk Register

| Risk | Probability | Impact | Mitigation |
|------|-------------|--------|------------|
| Data quality issues | High | High | Robust validation scripts |
| User resistance | Medium | Medium | Training & early involvement |
| Delays in data extracts | Medium | Medium | Align with IT, buffer time |
| Performance bottlenecks | Low | High | Optimize SQL, indexing |
| Scope creep | Medium | Medium | Enforce change process |

# 9. Stakeholder Management

## 9.1 Stakeholder Analysis

| Stakeholder | Interest | Influence | Engagement |
|---|---|---|---|
| Sales Management | High | Medium | Validate KPIs |
| Distribution Team | High | Medium | Test usability |
| Partner Management | High | Medium | Validate broker reports |
| IT Security | Medium | High | Compliance, access |
| Controllers | High | High | Define & validate reports |

# 10. Change Management

Change requests logged, reviewed by Business Analyst, prioritized, and integrated into scope with adjusted timeline.

# 11. Governance

- Steering Group: Sales, Distribution, Partner Mgmt., IT Security, Controlling.
- Decision Making: Consensus, escalations to Head of Controlling.
- Documentation: Stored in MS Teams folders.

# 12. Success Criteria

- Central DB live with input, mapping, and output tables.
- Automated Allianz, Vermittler, Banken, Broker reports.
- ≥40% manual effort reduction.
- Adoption by Sales, Distribution, Partner Mgmt.
- ≥80% user satisfaction post rollout.