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 SQL database using Python to consolidate data from SAP PAS, Cognos reports, 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.
- SAP PAS, Cognos Reports, MicroStrategy, Salesforce extracts.
- Deliver standardized Allianz, Vermittler, Banken, Broker reports, Weekly Salesforce reports.
- Provide ad-hoc query support.
- Enable Power BI dashboards for analysis.

1.3 Business Benefits

- Reduction in manual reporting effort.
- Drill-Down ability to analyse data.
- Flexibility for ad-hoc requests.

2. Scope Management

2.1 In Scope

- Database setup.
- ETL pipelines (ingestion, cleaning, transformation).
- Integration of SAP PAS, Cognos Reports, MicroStrategy, Salesforce extracts.
- Input, mapping, and output tables.
- Power BI dashboards.
- User documentation.

2.2 Out of Scope

- Real-time integration.
- Predictive modeling and advanced analytics.
- Source system configuration.

2.3 Deliverables

- Requirements documentation.
- Database schema (ERD) and table definitions.
- 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

- **Controller (Analyst):** Build ETL, design schema, define KPIs, validate reports.
- **Controller(BI Analyst):** Dashboards, ad-hoc views, usability.
- **IT Infrastructure:** Access rights.
- **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.
- manual effort reduction.
- Adoption by Sales, Distribution, Partner Mgmt.
- user satisfaction post rollout.