Vertriebscontrolling Database Project

# 📘 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.
* Integrate 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

* **Data Engineer:** 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.

# 13. System Design & Architecture

## 13.1 Overview

The system design follows a layered architecture commonly used in data engineering projects. The main goal is to consolidate data from SAP PAS, Cognos, MicroStrategy, and Salesforce into a centralized PostgreSQL database, with clear separation of staging, mapping, and output layers.

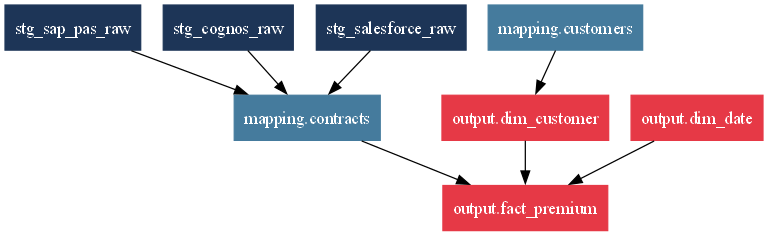
## 13.2 Architecture Layers

* **Source Layer:** Excel/CSV extracts from SAP PAS, Cognos, MicroStrategy, Salesforce.
* **Staging Layer:** Raw ingestion tables (schema: staging) that replicate source structures.
* **Mapping Layer:** Cleansed and standardized tables with applied business rules (schema: mapping).
* **Output Layer:** Business-ready fact and dimension tables (schema: output).
* **Analytics Layer:** Power BI dashboards and ad-hoc queries.

## 13.3 System Architecture Diagram

System Architecture Diagram

## 13.4 ERD (Entity Relationship Diagram)



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