



9/23/2018

# Project Charter/Scope Document

Case Problem: Integration of Robotic Process Automation at World Hotels for Event Management

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## PROJECT CHARTER

### Project

**Integration of Robotic Process Automation at World Hotels for Event Management**

### Project Identification

**EM-RPA-BP02**

### Summary of Project Background

WorldHotels is a collection of over 300 upscale and independent hotels in 250 destinations worldwide. In addition to the easy access to accommodation for customers, we also offer event management services. From business meetings to social events, we can fulfill every need to guarantee a successful event. To take it up a notch, we are planning to automate the numerous steps involved in Event Management. This will not only save time and money but also provide our customers with an unparalleled experience.

Blue Prism is leading the RPA (Robotic Process Automation) industry, and it has automated the internal audit system for WorldHotels. Blue Prism is known to focus on providing effective solutions and deliver the project on time and to budget. This is the reason it is an obvious choice when it comes to the new project of upgrading the event management systems.

### Project Business Case

WorldHotels is hoping to utilize robotic process automation to streamline their event management system. Below are the expected impacts of this project:

1. Reduced time and efforts to perform data entries in various systems of WorldHotels
2. Reduced human intervention for basic processes
3. Easy accommodation of changes without causing any errors
4. Improved productivity of the system as well staff

### Product Deliverables

The new event management system should include below features:

1. Automate the steps involved in event management for conferences, corporate meetings, trade shows, etc.
2. Automate the entries into accounting, customer relationship, event calendar, room reservation, and loyalty points systems
3. Automate the operations related to information transfer involved in accounting, customer relationship, event calendar, room reservation, and loyalty points systems
4. Handle the changes and last-minute updates with ease

### Process Deliverables

1. Project Plan and Budget with an estimate to be approved by the VP of IT by November 4th, 2018
2. Project overview presentation for the executive group and Board of Directors by December 1st, 2018
3. Approval on cost and Staff assignment Plan
4. In case of changes in the project plan, revise the project plan and start implementation on January 15th, 2019
5. Identify risks and issues involved in the process and prepare risk mitigation plans
6. Prepare a Preliminary Work Breakdown Structure defining tasks and steps involved in the process
7. Get approvals from key stakeholders
8. Project meeting schedules and communication platform to share project information
9. Project reviews at intervals and project progress reports
10. Quality management reports with details of test scripts, issues found during testing and resolutions
11. User training and initial setup by from Blue Prism's professional services team. Schedule staff training in advance to the actual implementation
12. Final Reports and Closing Procedures

**Known Time and Cost Constraints**

At this point in time, there is no specific time or cost constraints in the project. We will get a clear idea of these constraints once the project plans and estimates are approved and the Board of Directors and executive group see the project overview presentation.

**Project Scope Is:**

Implementation of RPA for one of the hotels of the WorldHotels collection in Americas Region without affecting the current functional flow of the system.

**Project Scope Is Not:**

Implementation of RPA for all the hotels in the WorldHotels collection.

**Other Organizations Involved**

Blue Prism is given the contract for setting up the RPA for our event management system.

**Assumptions**

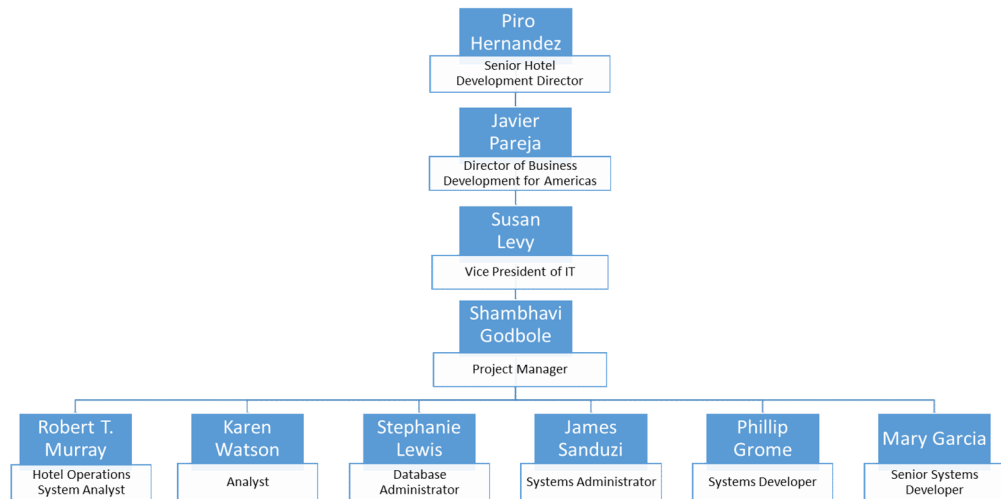
1. Training sessions will be organized by Blue Prism to help WorldHotel's staff to use the new system
2. WorldHotel's staff can work comfortably with the new system after initial training
3. The new event management system can be integrated with the existing technology and it won't negatively impact the existing system of WorldHotel Collection

**Team Members**

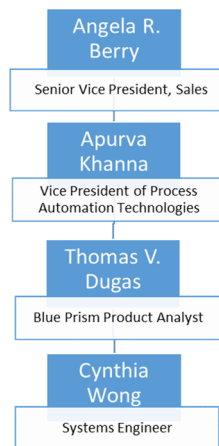
Names	Roles	Responsibilities
Shambhavi Godbole	Project Manager	Overall responsibility of the project initiation, planning, design, execution, monitoring, controlling and closure
Robert T. Murray	Hotel Operations Systems Analyst	Lead on project teams for new systems implementations, changes, or upgrades
Karen Watson	Analyst	Support senior management in sourcing and evaluating the system
Stephanie Lewis	Database Administrator	Manage the installation, configuration, and maintenance of WorldHotel's databases.
James Sanduzi	Systems Administration	Ensure the systems are running efficiently and effectively
Mary Garcia	Senior Systems Developer	Develop and promote conventions on production readiness and operational excellence
Phillip Grome	Systems Developer	Develop and implement applications and programs for the backend processing systems used in businesses and
Angela R. Berry	Senior Vice President, Sales	Blue Prism technology staff
Apurva Khanna	Vice President of Process Automation Technologies	Blue Prism technology staff
Thomas V. Dugas	Blue Prism Product Analyst	Blue Prism technology staff
Cynthia Wong	Systems Engineer	Blue Prism technology staff

## Project Organizational Reporting Structure Chart

### World Hotel Project Team and Roles



### Blue Prism Project Team and Roles



## Milestones/High Level Phase

Phase	Expected Date	Actual Date
Project Plan and Estimate	11/4/2018	
Board Presentation and Project plan Approval Meeting	12/1/2018	
Decide the hotel which will be a prototype for RPA implementation	TBD	
Complete business and technology requirement Analysis	TBD	
Define Project phases and timeline	TBD	
Start Implementation of product and process deliverables	1/15/2019	
Complete Implementation of product and process deliverables	TBD	
Complete Quality Assurance Testing and User Acceptance Testing	TBD	
Train staff to get them acquainted with the new system	TBD	
Final project delivery	TBD	
Overview presentation to stakeholder	TBD	

Project Sequence	
Step	Details
Initiation	Identify project objective, analyze the system, take approvals on project plan and budget, perform feasibility Analysis, select project team selection, etc.
Planning	Estimate the details of work to be done, identify project task, timeline and resource requirements, manage scope, identify dependencies, analyze risks involved, establish a
Execution	Design and implementation, stand-up meetings, feedback from key stakeholders
Monitor and Control	Project status reporting, testing, and deployment of the system to production/live environment
Closure	Deploy product deliverables and complete process deliverables, take final stakeholder approval

Project Integration Plan
<p>Below are some processes to achieve a smooth project integration:</p> <ul style="list-style-type: none"> <li>▪ Prepare documents for every phase of the project i.e. document system analysis report and business requirement details, prepare technical design document, log change requests, prepare test scripts, store daily status reports to track the progress, etc.</li> <li>▪ Conduct regular meetings with employees working on implementation, analysts and project manager. Organize knowledge transfer sessions if any team member is delegating tasks to others. Report the project status to key stakeholders to maintain their confidence in the project.</li> <li>▪ Get stakeholder approval for every change request after analyzing its impact on the system.</li> <li>▪ If any requirements affect the timeline or budget of the project, try to move it in the next phase. Make sure we have necessary approvals while doing so.</li> </ul> <p>Above procedures will facilitate smooth integration of the project across all its phases.</p>

Risk Assessment	
Identified Risk	Mitigation Plan
Unclear scope and system requirements	Conduct meetings with key stakeholders to define the exact requirements and scope of the project.
WorldHotel staff unable to use new system	Provide mandatory training to the staff and organize Question-Answer sessions every week until the staff get's used to the new system.
Communication issues with the cross-functional team	Create standardized ways to communicate with teams. Create MoM documents after every meeting and circulate in the team. Use cloud-based solutions for storing important information so that everyone can easily access it.
Loss of system data during deployment activities	Backup the system data and operation details before replacing it with the new system.
New system is not compatible to events held at other than the prototype hotel	Design a system which is scalable and can be implemented to multiple hotels keeping their respective uniqueness intact

Key Stakeholder Signatures		
Name (Role)	Signature	Date
Piro Hernandez (Senior Hotel Development Director)		
Javier Pareja (Director of Business Development)		
Susan Levy (Vice President of IT)		
Shambhavi Godbole (Project Manager)		
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Shambhavi Godbole (Project Manager)		

Prepared By	Date of Creation/Revision
Shambhavi Godbole	9/23/2018