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| **TITLE:** | Project Management | | |
| **sop #:** | BIS-01 | **revision #:** | 1 |
| **EFFECTIVE DATE:** | May 20, 2020 | | |
| **OWNER:** | Jonathan Lutz | | |

## REVIEWERS

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| Name | tITLE | sIGNATURE | dATE |
| Fraser Greig | Solution Design Manager | Signed | May 20, 2020 |

## APPROVER

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| Name | tITLE | sIGNATURE | dATE |
| Jonathan Lutz | Director, Solutions Design and BI | Signed | May 20, 2020 |

# 1.0 purpose

The purpose of this document is to describe the process for how projects are managed at Radiant by the Supply Chain Solutions Design and Business Intelligence group.

# 2.0 SCOPE

This workflow describes the tasks performed by the Project Manager in the Solution Design and Business Intelligence group. Client Integration & Development department to ensuring the smooth integration implementation of strategic accounts customers into the Radiant’s 3PL framework network.

**Note:** The documented process represents a general plan and does not reflect the detail variation from project to project. Also, the detail and degree of project management and integration (partial outsource vs. full outsource) will be decided between Radiant and the client.

# 3.0 equipment

N/A

# 4.0 definitions

|  |  |
| --- | --- |
| **Definition** | **Explanation** |
| DSDBI | Director of Solution Design and Business Intelligence |
| PM | Project Manager |

# 5.0 Responsibility

| **Responsibility** | **Activity** |
| --- | --- |
| **Director Solution Design and Business Intelligence** | * It is the responsibility of the Director of Solution Design and Business Intelligence to ensure adherence to this workflow by the Project Managers. * It is the responsibility of the Director of Solution Design and Business Intelligence to ensure that projects are tracking to set timelines and working with customers to facilitate the completion of the project. * It is the responsibility of the Director of Solution Design and Business Intelligence to monitor costs and provide input on the management of the project * It is the responsibility of the Director of Solution Design and Business Intelligence to assist in the removal of any barriers to the continued progress of the project. |
| **Project Manager** | * It is the responsibility of the assigned project manager to ensure that service is delivered to the best capacity in accordance with this procedure |

# 6.0 policy

## 6.1 NEW ACCOUNT ON-BOARDING

1. Director of Solution Design and Business Intelligence (DSDBI), working with sales, IT, the Project Manager (PM) and the customer will scope the project and confirm the need for a 3PL solution
2. The PM will work with the Project Plan template as a checklist of tasks that need to be completed. This will help establish the scope of the project.
3. The PM will create an initial project plan or schedule of activities involving the departments and resources required.

**Note:** Specific departments such as IT are highly constrained so the PM must make sure that IT has sufficient time to meet the timelines for the deliverables

1. The PM will review the proposed project plan with the team and make adjustments to the project as required.

**Note:** This may include external resources such as the clients or outside contractors.

1. The PM is responsible for ensuring that all documentation related to the project is centralized and accessible to all parties.
2. Arrange a kick-off meeting with the customer and your team members. During this meeting, the PM and team members will gather as much information about the customer’s supply chain as possible. Work through as much of the Project plan template as possible.
   1. Set up next meetings, assign work to team members and establish lines of communication between key parties on the client’s side and at Radiant.
3. The PM and team members should take notes throughout the meeting to record information provided by the client and to establish how the client and Radiant will collaborate on the project.

**Note:** The PM will ultimately be responsible for adjusting the project plan as information becomes available.

1. Disseminate notes and updated project plan to the client as confirmation of understanding of project scope and timelines. Adjust timelines as required.
2. The PM will establish a finalized project plan identifying the critical path and key milestones and deliverables. This project plan will be disseminated to all parties.
3. The PM will set meetings at regular intervals with the internal team and with customer (when possible) to discuss the progress of the project, timelines, constraints and barriers to completion through the duration of the project.

## 6.2 MANAGING SPECIAL CUSTOMER INITIATIVES AND INTERNAL PROJECTS

1. Operational managers working on the account or the designated PM and the Supply Chain Analysts will over time seek to ‘optimize’ the client’s supply chain to find potential cost-savings. From time to time, these optimization or cost-savings ideas may come from the customer. Internal Projects may also arise that require a formal project management approach.

**Note:** Internally, Radiant should always be reviewing the business to see if there are ways to improve our margins.

1. Any cost savings or optimization opportunities should be discussed internally with the Radiant Supply Chain Solutions Design and Business Intelligence team and any other relevant internal parties for validation before presenting to the client.
2. If internal consensus is achieved, the PM or DSCSDSDBI will schedule a meeting with the client.
3. If the proposed initiative or optimization will have an impact on the client’s supply chain, or will require client resources, it must be discussed and approved prior to implementation. This may include any associated additional costs.
4. If the client approves the initiative or optimization, the PM and/or the DSCSDSDBI will be responsible for assembling the team that will work on the project (Note: this may include members from the client’s business)
5. The PM will create a project plan or schedule for implementation which will be shared with the customer.
6. Once the initiative is started, the PM is responsible for ensuring the project is tracking to meet deadlines. The PM may review with DSCSDSDBI to help remove barriers to the completion of the project.

# 7.0 references

N/A

# 8.0 revision history

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| **Revision #** | **Revision Date** | **Description** |
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