

Project Plant Pals

Project Documentation Dashboard

Start Date: February 15th

Document Status: *Draft* | In Review | Approved

Project ManagerTravis Yardley

DescriptionA compilation of project timelines, communication plans, and documentation resources

Overview	
Project charter	Outlines the project's goals, key deliverables, team
Statement of work	Scope and milestones for inventory and fulfillment software
Risk management plan	Projected risks, probability, and mitigation overview
Schedule	Gantt style progress tracker
Budget	Comparative breakdown of budget and costs
Communication plan	Best practices for team, cross team, and stakeholders
Shared folder	To be added at a later date
RACI chart	Accountability auditing method



COMPANY NAME: Office Green  
CREATION DATE: 02/15

[illegible]

## Budget: Project Plant Pals Operations & Training

							TARGET BUDGET	ACTUAL/ FINAL SPEND	UNDER/ OVER
							\$ 62,000.00	\$ -	\$ 62,000.00
		LABOR		MATERIALS		FIXED COST	BUDGET	ACTUAL	UNDER/OVER
MILESTONES & TASKS		EMPLOYEE DETAILS	HOURS	RATE	UNITS	\$/UNIT			
Milestone 1: Establish a plant delivery and logistics plan									
Task 1: Purchase delivery trucks				2	\$15,000.00		\$ 30,000.00		\$ (30,000.00)
Task 2: Source packaging materials.				1500	\$2.00		\$ 3,000.00		\$ (3,000.00)
Task 3: Pay delivery drivers.		Delivery Driver (2)	160	\$ 15.00			\$ 2,400.00		\$ (2,400.00)
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Total							\$ 35,400.00	\$ -	
Milestone 2: Select and install supply chain management software and equipment									
Task 1: Source vendors*						\$ 15,000.00	\$ 15,000.00		\$ (15,000.00)
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Total							\$ 15,000.00	\$ -	
Milestone 3: Develop and launch an employee training program									
Task 1: Develop training sessions		HR Specialist	80	\$ 50.00			\$ 4,000.00		\$ (4,000.00)
Task 2: Train employees to use the software and equipment		Training Manager	80	\$ 25.00			\$ 2,000.00		\$ (2,000.00)
Task 3: Monitor employee progress and imporove training processes.		Training Manager	80	\$ 25.00			\$ 2,000.00		\$ (2,000.00)
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Total							\$ 8,000.00	\$ -	
Reserve buffer							\$ 3,600.00		
TOTAL							\$ 62,000.00	\$ -	
(* includes setup, installation and deployment of software and equipement systems)									



## Project Plant Pals: Employee Training Communication Plan

Recipients	Type of Communication	Frequency	Sender/Owner	Key Dates	Delivery Method	Goal	Resource Links	Notes
Core Team	Planning Meeting	Daily	Project Manager	Every day at 3pm	In Person	Project planning and task updates to make sure the team stays on track	<a href="#">[link to meeting agenda and notes]</a>	If needed, check in with manager about any high-level questions before meetings.
Software and Equipment Vendor	Planning Meeting	One time	Core Team: HR Specialist & Training Manager	Half day, Friday before development of the training plan begins; confirm date and time three days in advance	In Person	Go over the training manual in order to create an effective training plan for Office Green's employees	<a href="#">[link to vendor SoW]</a>	This meeting needs to take place before the end of the vendor's SoW. Make sure the HR Specialist & Training Manager check in with fulfillment and inventory team members about the outcome of the meeting.
Human Resources	Planning Check-In	Weekly	Core Team: HR Specialist	Also send reminders (via email) the day before each training	In Person	Project planning assistance; provide support during the training session		Additional communication on an as-needed basis
Facilities	Planning Check-In	Weekly	Core Team: Administrative Coordinator	Tuesdays at 2pm	Phone Call	Reserve rooms, spaces, and equipment needed for employee training	<a href="#">[link to room and equipment reservation form]</a>	
Print Shop	Planning Check-In	Weekly	Core Team: Administrative Coordinator	Thursdays, including the day before the event	Phone Call	Coordinate on the printing and delivery of training manuals for employees	<a href="#">[link to printing order form]</a>	
Office Green employees	Informational Update	Weekly	Core Team: Training Manager	Fridays, including the Friday before training sessions begin	Email (from company address)	Communicate schedules, locations, and other necessary details to trainees	<a href="#">[trainee email list]</a>	Set up automated reminder emails
Office Green employees	Training	Daily	Core Team: Training Manager	Each day for ten days, starting at 10am	In Person	Train employees to use the supply chain management software and equipment	<a href="#">[link to training schedule]</a>	
Office Green employees	Survey	One time	Core Team: Training Manager	The first business day after trainings end, with two follow-up reminders	Email (from company address)	Post-training survey	<a href="#">[trainee email list]</a>	Discuss results at next team meeting
Your Manager	Status Update	Weekly	Project Manager	Monday afternoons at 2pm	In Person	Update on event planning, ask questions, and get feedback		Come prepared with a brief update and specific questions
Senior Leaders: Director of Operations and the Director of Product (and CC your manager)	Status Update	One time	Project Manager	Debrief the week after the event	Email (from individual address)	High-level information and general updates	<a href="#">[link to folder with training notes and survey results]</a>	

<b>Operations &amp; Training</b>				
<b>Risk Management Plan</b>				
<b>Project Sponsor:</b> Director of Product				
<b>Author:</b> Travis Yardley		<b>Created:</b> 12/04/2021		
<b>Status:</b> Draft		<b>Updated:</b> 12/04/2021		
<b>Revision History:</b>				
Revised by	Approved by	Revision Date	Description of Change	
<b>Purpose:</b>				
The goal of this Statement of Work (SoW) is the successful configuration and installation of new inventory and fulfillment tracking software and equipment for the Plant Pals team.				
<b>Scope / major project activities:</b>				
Install and configure inventory and fulfillment racking software on all devices that employees will use to manage inventory and schedule deliveries (includes auditing existing Office Green software and developing optimizations)				
Create training manuals and a maintenance guide for the software and equipment				
Install fulfillment equipment in Office Green's warehouses				
Meet with two Office Green employees to review the manuals and answer questions about the software and equipment				
<b>Out-of-scope activities:</b>				
Ongoing maintenance of the software (beyond the contract dates)				
Ongoing training of employees (beyond the contract)				
<b>Deliverables:</b>				
Installation and configuration of software on all Office Green devices				
Training manuals and maintenance guide				
<b>Major Milestones:</b>				
Milestone 1: Software configuration and installation				
Milestone 2: Equipment installation				
Milestone 3: Training manuals and maintenance guide				
Estimated hours for completion: 80 hours				
<b>Estimated date for completion:</b> Friday, April 23				
<b>Payment Terms</b>				
All vendors and contractors will be paid upon the delivery of goods and services, unless otherwise negotiated.				

Operations & Training  
Risk Management Pla

<b>Author:</b> Travis Yardley	<b>Created:</b> 12/04/2021
<b>Status:</b> Draft	<b>Updated:</b> 12/04/2021

### Objective

The objective of this document is to outline the potential risks to the deployment and success of the Plant Pals project, as they pertain to the project's budget and schedule.

## Executive Summary

In our efforts to create sustainable fulfillment and delivery practices on a day-to-day level, with a focus on best practices to ensure the demands of the Plant Pal service are consistently met at a high level, we have discovered several potential risks to the projects' success as detailed below.

**RISK SCENARIO:** Going over the project budget

Possible Causes	RISK LEVEL	Mitigation Plan
An increase of \$16000 in purchase cost for each delivery truck.	HIGH	<b>Transfer:</b> Investigate the cost of a truck rental or leasing agreement with a third party in order to facilitate the delivery of our product.
Product vendors increase pricing above the expected rate.	MEDIUM	<b>Reduce or control:</b> Diversify our purchasing over several vendors, so that any rate increase at one supplier will be defused over several others - normalizing the price.
Loss of product shipments.	LOW	<b>Accept (active):</b> Set aside funds within the budget to cover breakage.

### RISK SCENARIO: Falling behind the training schedule

Possible Causes	RISK LEVEL	Mitigation Plan
Interruption of staff training due to key personnel missing work.	LOW	<b>Avoid:</b> Implement cross training so that multiple people are able to administer the training program.
Insufficiently trained staff, due to low hiring numbers.	MEDIUM	<b>Transfer:</b> Enlist a recruiting firm to ensure that we are able to hit our hiring target with enough time before launch to ensure adequate training time.
Poor employee retention rate due to rigorous training process.	MEDIUM	<b>Reduce or control:</b> Inevitably any training program is going to put stress on people; however, we can mitigate this effect on our retention rate by offering success focused coaching, managing the pace of the training, and properly screening for candidates with a high likelihood of success during the hiring process.

## Appendix:

**Probability chart:**

Qualitative	Quantitative (if measurable)
Low	<10% chance of occurring
Medium	10%-49% chance of risk occurring.
High	50%-100% chance of risk occurring.

**Impact chart:**

	Low	Medium			High	
<b>Types of Impact</b>						
<b>Financial</b>	Low financial impact, costing the company \$0-\$14,	Medium financial impact, costing the company \$15,000-\$29,000			High financial impact, costing the company \$30,000 or more	
<b>Operational</b>	Low impact to project operations	Medium impact to project operations, with potential to delay project by a month or more			High impact to project operations, with potential to cause project failure	
<b>People</b>	Low impact to employee attrition	Medium impact to employee attrition, with 25%+ of employees quitting			High impact to employee attrition, with 50%+ employees quitting	

### Probability and Impact Matrix:

## Inherent Risk

		Impact		
		Low	Medium	High
Probability	High	Medium	High	High
	Medium	Low	Medium	High
	Low	Low	Low	Medium



<b>R - Responsible</b>	Completes the deliverable or task.					
<b>A - Accountable</b>	Makes final decisions and signs off on task completion. Only 1 per task.					
<b>C - Consulted</b>	An advisor, stakeholder, or subject matter expert who offers guidance before an action is taken.					
<b>I - Informed</b>	Kept up to date on decisions made.					
<b><i>Plant Pals Marketing &amp; Sales Strategy</i></b>	<b>Dir. of Product</b>	<b>Marketing Manager</b>	<b>Marketing Coordinator</b>	<b>Copywriter</b>	<b>Head of Sales</b>	<b>Sales Manager</b>
<b>PHASE 1</b>						
<b>Task/Deliverable</b>						
Create a marketing plan for the new service.	C	A	R	C	C	I
Write promotional copy	I	A	C	R	I	I
Design marketing assets	I	A	R	C	I	I
Create customer outreach & onboarding plan	C	C	I	I	A	R
<b><i>Plant Pals Landing Page</i></b>	<b>Web Manager</b>	<b>Graphic</b>	<b>Web</b>	<b>QA Tester</b>	<b>Content</b>	<b>Web</b>
<b>PHASE 2</b>						
<b>Task/Deliverable</b>						
Design a landing page	A		C			R
Create a landing page mock up	A	C	I		C	R
Design image assets	I	R				A
Write content	A				R	
Code the landing page	I		R			A
Test the landing page			A	R		C





<b>Benefits, Costs, and Budget</b>									
<b>Benefits:</b>	Directly supports new service, resulting in a projected 5% increase to revenue								
	Reduce late shipments, and associated costs								
	Increase customer satisfaction and retention.								
	Maintain or exceed current customer satisfaction rating (90%).								
<b>Costs:</b>	Software development costs, installation fees								
	Hiring and training costs								
	Purchase, insurance, and maintenance of delivery truck fleet								
<b>Budget:</b>	\$75 000								
<b>Scope and Exclusion</b>									
<b>In Scope:</b>									
Delivery processes		Shipping and receiving, storage guidelines							
Customer service standards		Ongoing maintenance of supply chain management software							
Hiring requirements - warehousing, software, delivery, logistics									
Training materials - Documentation (written and video), lesson plans									
<b>Out of Scope:</b>									
Product development		Insuring and maintenance schedule for delivery fleet							
Vendor contracts		Client outreach							
Marketing materials									
<b>Project Team</b>									
<b>Project Sponsor:</b> Director of Operations									
<b>Project Lead:</b> Travis Yardley									
<b>Project Team:</b> Fulfillment Director, Quality Assurance Tester, Inventory Manager, Financial Analyst, Human Resources Specialist, Training Manager									
<b>Additional Stakeholders:</b> VP of Customer Success, Account Manager, Receptionist, Sales Director, Sales Team, Marketing Director, Investors									
<b>Measuring Success</b>									
Successful completion of the training program by 90% of employees.									
95% of all orders placed are delivered on time by the end of Month 1.									

All Plant Pals orders are shipped within 48 hours of being placed.