THE ICE CREAM SHOP

**Business Intelligence (BI) Implementation**

**Project Management Plan**

MAIN BRANCH

2300 Sycamore Rd, Dekalb, IL 60115

EMAIL

[*IT\_ProjectManagementTeam@theicecreamshop.com*](mailto:IT_ProjectManagementTeam@theicecreamshop.com)

DATE: 02-11-2023

Business case

# TABLE OF CONTENTS

Table of Contents

Business Case ………………………………………………………………………………………………1

Project Charter….………………………………………………………………………………………….16

Scope Statement………………………………………………………………………………………… ... 21

Schedule Management……………………………………………………………………………………..25

Risk Management………………………………………………………………………………………….28

Communication Plan……………………………………………..………………………………………29

Stakeholder Management Plan…………………………………………………………………………..30

# Executive Summary

The Ice Cream Store Company’s business is growing rapidly, which is encouraging. But, along with growth come challenges for the organization. During supply chain management, there are issues such as high processing times, delays in decision and strategy making, and inventory wastage which is due to data analysis as it consumes with the present systems. The use of Business Intelligence (BI) to implement data centralization, enables organizations to communicate across departments and make real-time decisions based on real-time data, leading to high-performance management, competitive advantage. We expect to see an increase in efficiency, efficient use of available resources for critical tasks, running operations on time, and saving a lot of money. In this business case explicit project goals, performance measures, assumptions, constraints, and alternative options will be discussed in detail.

### Issue

With the rapid growth of the Ice Cream Store Company, it has become difficult to make strategies and decisions. Operations are chaotic. We depend on technical teams to create custom reports on Desktop Spreadsheets. Instead of analyzing data, we have been compiling devices. Optimizing processes in supply chain metrics using data analytics can save time and resources. Sales team has difficulty to access and monitor data regarding customer profitability, discount analysis and life cycle of customers.

Real-time campaign metrics are not available making measuring effort performance and planning future campaigns more difficult. Implementing Business Intelligence now is the right move before we are hindered by Performance Management, Market response, or our customers move to our competitors. Gaining quick, accurate, and reliable insights is much easier when you use a centralized data warehouse.

### Anticipated Outcomes

With variety of tools and techniques provided in Business Intelligence, the Ice Cream Shop Company can make well-informed, reliable and timely decisions based on current real-time data. Different departments of the company can perform quantitative analysis, measure key performance indicators (KPIs) and use customer insights to identify new opportunities. The migration of technology will reduce overhead costs and expenses associated with managing these tasks currently requiring a large workforce. We will have all our employees comfortable with the software at the end of the project.

Centralized and easily understandable data is provided to the employees which makes the non tech users also to understand business activities. This technology will help the company lower production wastage and boost productivity by assuring optimum operations. This enhances competitive intelligence,

Market Intelligence, Social Media Intelligence, Conversion Ratio, Security and Data Integration. Increase in Sales and reduction in Supply chain wastage.

### Recommendation

In order to improve business processes, we analyzed various options and alternatives. In addition, we can reduce overhead costs within The Ice Cream Store Company. In this paper, we describe how we use technology to continuously improve efficiency and reduce costs. This project will be responsible in creating data warehouse where the company’s information from variety of sources is centralized and stored. Here we can use the BI data analytics and mining tools to analyze the data and monitor it. We will implement the process as a proof of concept to understand and modify depending on the predefined KPI’s. The technical teams will then train the employees and managers on the systems.

Some of the ways that this technology will achieve its desired results are:

* + - Using the analytics tool analysts can find the areas of improvement and what strategic recommendations to propose to company leadership.
    - Insights will be gained from analyzing KPIs against key business goals. By doing so, proactive measures can be taken to improve performance. In the sales department, monitoring revenue targets, sales rep performance, and sales pipeline for managers are easy. Analysts can have intricate information like discount analysis, and customer profitability prompts.
    - By blending financial data with operations, marketing and sales data, users can pull insights from which decisions can be acted upon and understood that impact profit and loss.
    - BI tools help marketing team to track campaign metrics from a central digital space. BI systems can measure each efforts performance and plans the future which gives more visibility and overall performance.
    - To save time and resources, managers can access and analyze data like supply chain metrics to find ways to optimize processes and ensure that service level agreements are met and help improve distribution routes.

### Justification

A BI system will result in greater efficiency regarding a company's growth, resources, and time management. The BI Project is also aligned with corporate strategy and objectives since it uses technology to improve the way we do business. After analyzing other alternatives and the status quo, the BI Project was chosen as part of this business case. This was because of its ability to deliver benefits expeditiously. In addition, it provided the greatest opportunity for improvement. Other alternatives

assumed increased risk, provided less benefits, were too difficult to define, or were not suitably aligned with current corporate objectives.

Estimates for the BI Project are:

* + - We can predict supply chain management and reduce loss of inventory
    - Integrated data and analytics tools by replacing spreadsheets which is very time consuming and inaccurate. The technology we developed now can do the work of 1/10th of the employees now. Freeing up employees can be provided with other opportunities within the company
    - By using BI tools and techniques we can make great decisions in Marketing, and Sales. This gives us a huge competitive advantage and will keep us ahead in the market.
    - centralized data processing time and communication gaps are reduced.
    - We can produce the product based on sales data and analysis of previous data we can conclude the quantity of the varieties required for each season at different locations.
    - We can produce and distribute accordingly to the warehouses reducing the space required for the warehouses and send the stocks in required quantities by checking the alerts. This reduces a lot of wastage of product during supply chain management.

# Business Case Analysis Team

The following individuals comprise the business case analysis team. They are responsible for the analysis and creation of the BI Project business case.

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **Name/Title** |
| Executive Sponsor | Provide executive support for the project | Vaishnavi P, VP Operations |
| Process Improvement | Advises team on process improvement techniques | Ajay D, Process Team Lead |
| Project Manager | Manages the business case and project team | Ted G, Project Manager |
| Technology Support | Provides all technology support for the project | Allen pension, Software Group Lead |

# Problem Definition

### Problem Statement

The Ice Cream Store Company relies on technical teams for data compilation. As the company grows rapidly, maintaining accurate data has become increasingly difficult. We spend more time discussing whether data is reliable than analyzing it. Desktop spreadsheets do not enable real-time data sharing and updating. Many traditional data tools are so complicated that only a few individuals within the company know how to handle them. In addition, every time we need a custom report we must rely on our tech- skilled colleagues. Although we have invested in recruiting members for the Tech Teams, it is only a temporary solution. During the supply-chain management process, there is significant waste of products. Time and resources are wasted due to the lag in accessing complex data for many key operations like discount analysis, campaign metrics, etc. A BI system can solve many underlying issues in an organization.

### Organizational Impact

The BI Project will impact The Ice Cream Store Company in several positive ways. The following provides a high-level explanation of how the organization, tools, processes, and roles and responsibilities will be affected as a result of the BI Project implementation:

**BI Tools:** Data will be centralized from all different sources. While business intelligence analytics tools and techniques are used in data mining and analysis, business performance management tools monitor business goals. These tools and techniques will be installed in different departments of the organization. Interactive dashboards with data visualization and reporting tools provide quick access to information. In the future, we will only use BI instead of spreadsheets, as it is more efficient and accurate. This will require training employees on BI tools and their use in support of other organizational tools.

**Processes**: With a BI solution, everyone in the organization, including managers, senior executives, and functional teams, can access and analyze up-to-date information whenever they need it, wherever they are, on a range of different devices. This improved efficiency will lessen the burden on Technical Teams and reduce the time to create reports. Making strategies and decisions becomes easier when up-to-date reports are available at any time. With a BI system in place, all the data required comes from one source and can be accessed from one dashboard and converted into a report. This saves both time and energy while making the process much more efficient.

**Roles and Responsibilities:** The upgraded platform will be managed by the technical team, and we do anticipate a few changes to IT staffing requirements for a year during the project implementation. The IT group will also take responsibility for training staff on BI tools.

**Hardware / Software:** In addition to the software and licensing for the project, The Ice Cream Shop Company will be required to purchase additional servers to accommodate the platform. Finding the right

software for your business. Choosing a data storage environment and platform and making such purchases for the next 10 years.

### Technology Migration

To effectively implement a ***BI platform****,* a approach has been developed that will result in minimal/no disruption to day-to-day operations, administration, and payroll activities. The following is a high-level overview of the phased approach:

**Stage I:** creating a business intelligence strategy that allows us to measure and expose shortcomings, improve competitive advantages, and use data mining and analytics for successful decision-making. Set KPIs that are measurable, aligned with your objectives, and vital to achieving your business goals. Appoint stakeholders educate staff and build a stellar team.

**Stage II:** We will use the Desktop Spreadsheet for day-to-day operations, reporting, and other data activities. We will purchase a data storage environment and platform according to our needs, through which we will centralize data.

**Stage III:** We will select and purchase the most suitable software suitable for analysis, mining, and processing respectively. The technical team will gather the data to cleanse, process, and analyze. We will define the tasks and delegate the resources.

**Stage IV:** Finetuning the data preparation process. As data preparation takes more time, we will focus on that in this phase.

**Stage V:** Implement the process as a proof of concept and the changes made to KPI. Here we will test whether the project meets initial expectations. If not, see what can be done to achieve the initial KPIs. All employees will receive training on the newly developed BI platform.

**Stage VI:** The web-based BI platform will be live.

# Project Overview

As there are some significant growth factors that can change the organizations standards in positive ways by implementing the BI project. This will also promote one of our organizations objectives to grow with technology. Business intelligence can be used in analytics for different departments like sales, marketing, strategy. By forming a link between sales and production, we can produce varieties- based sales of previous years and anticipate the warehouse planning at different locations. Data can be used for competitive advantage, market intelligence, sales intelligence. Major milestones have been setup based on different stages of planning and execution. As the project is approved and moves forward, each of these components will be expanded to include a greater level of detail in working toward the project plan.

### Project Description

**Planning:** A business intelligence strategy is a blueprint used to measure performance, expose shortcomings, improve competitive advantages, and use data mining and analytics to make better decisions. A clear understanding of the key elements is vital. Identify our needs, and a potential solution that matches the needs of the organization. KPIs that are trackable on a company-wide scale should be defined, as well as those that are trackable within a particular department.

**Development:** Based on our objectives and KPIs, we will purchase the data storage platforms and the data analytics tools. We will spend at least 60% of the project time on the data preparation process, as it is a very time-consuming but crucial task. Now we are ready to analyze the information.

**Testing**: Implement the pilot project and check if the project meets the initial expectations. If it doesn’t, we will modify it in a way that matches the initial KPIs. Rather than implementing the project in the entire organization at once, we will do it in pilots.

**Training**: All the required employees in the organization will be trained with this updated technology, so that they can easily access the data.

### Goals, and Objectives

The BI Project directly supports several of the corporate goals and objectives established by The Ice Cream Store Company. The following table lists the business goals and objectives that the BI Project supports and how it supports them:

* + - Reduced Processing Time: Processing time for strategies and decision-making is now faster with all the reports being available at any point in the day. Operations are systematic.
    - Improves Staff Efficiency: Instead of spending a lot of time on data processing, reporting, and corrections staff can do something new and more meaningful like analysis of the information produced. Quick access to data allows complex analyses like discount analysis, sales rep performance, and profit loss analysis much easier.
    - Reduces Communication Gaps: As the data is centralized and accessible, there won’t be any inaccuracies or issues between different departments.
    - We can produce the product based on sales analyses of previous data. We can determine the number of varieties required for each season at different locations. This reduces the space needed in warehouses to store stock. This reduces a lot of wastage of products during supply chain management.
    - Reduce Overhead Costs: As we reduce the staff required for data processing and reporting, overhead costs will be reduced.

### Project Performance

The following table lists the key resources, processes, or services and their anticipated business outcomes in measuring the performance of the project. These performance measures will be quantified and further defined in the detailed project plan.

|  |  |
| --- | --- |
| **Key Resource/Process/Service** | **Performance Measure** |
| Reporting | The web-based system will reduce reporting discrepancies (duplicates and gaps) |
| Software and System Maintenance | Decrease in cost and staff requirements as system maintenance will be reduced. |
| Staff Resources | Elimination of Tech positions in Data Compilation and analysis which are no longer required as several functions will now be automated. |

|  |  |
| --- | --- |
| **Key Resource/Process/Service** | **Performance Measure** |
| Communication gaps | As the data is centralized and processed, there will be no inaccuracies or disputes between the departments which keeps it transparent. |
| Processing Time | Processing time for Strategies and decision-making now faster with all the reports being available any point in the day. Operations are systematic. |

### Project Assumptions

The following assumptions apply to the BI Project. As project planning begins and more assumptions are identified, they will be added accordingly

* + - All staff and employees will be trained accordingly in their respective data analysis and reporting tasks on the updated BI system
    - Funding is available for training
    - Funding is available for purchasing hardware/software for a web-based system
    - All department heads will provide the necessary support for successful project completion
    - Project has executive-level support and backing

### Project Constraints

The following constraints apply to the BI Project. As project planning begins and more constraints are identified, they will be added accordingly.

* + - As implementation will be done internally and not by the product developers or vendors, there will be limited support from the hardware/software providers.

### Major Project Milestones

The following are the major project milestones identified at this time. As the project planning moves forward and the schedule is developed, the milestones and their target completion dates will be modified, adjusted, and finalized as necessary to establish the baseline schedule.

|  |
| --- |
| **Milestones/Deliverables** |
| Project Charter |
| Project Plan Review and Completion |
| Project Kickoff |
| Stage I Complete |
| Stage II Complete |
| Stage III Complete |
| Stage IV Complete |
| Stage V Complete |
| Stage VI Complete |
| Closeout/Project Completion |

#### STRATEGIC ALIGNMENT

The BI Project is in direct support of several of the Ice Cream Company’s Strategic Plans. By directly supporting these strategic plans, this project will improve our business and help move the company forward to the next level of maturity.

|  |  |  |
| --- | --- | --- |
| **Plan** | **Goals/Objectives** | **Relationship to Project** |
| Strategic Plan for Information Management | Improve record keeping and information management | This project will allow for real-time information and data entry, increased information accuracy, and a consolidated repository for all payroll and administrative data |
| Strategic Plan for Information Management | Utilize new technology to support company and department missions more effectively | New technology will function to be automated reducing the levels of staff required to manage these systems |

#### COST BENEFIT ANALYSIS

The following table captures the cost and savings actions associated with the BI Project, descriptions of these actions, and the costs or savings associated with them through the first year. At the bottom of the chart is the net savings for the first year of the project.

|  |  |  |  |
| --- | --- | --- | --- |
| **Action** | **Action Type** | **Description** | **First year costs (- indicates anticipated savings)** |
| Purchase BI Software product and licenses | Cost | Initial investment for BI Project | $400,000.00 |
| Software installation and training | Cost | Cost for IT group to install new software and for the training group to train all employees | $100,000.00 |
| Reduce Staffing for Technical Teams and Managerial posts | Savings | An immediate reduction in overhead equal to the annual salary 10 technical team members and respective managerial positions | -$183,495.00 |
| Reduce employee turnover by 10% | Savings | Savings in cost to out-process exiting employee and recruit, hire, and train new employees is approximately $50,000 in the first year. | -$50,000 |
| **Net First Year Savings** |  |  | **$266,505.00** |

Based on the cost benefit analysis above we see that by authorizing the BI Project, the Ice Cream Store Company will spend over **$266,505.00** in the first year alone.

#### ALTERNATIVES ANALYSIS

The following alternative options have been considered to address the business problem. These alternatives were not selected for several reasons which are also explained below.

|  |  |
| --- | --- |
| **No Project (Status Quo)** | **Reasons For Not Selecting Alternative** |
| Keep the desktop spreadsheet system in place | * Unnecessary expenditure of funds for increased staffing levels * Continued occurrence of a high number of data errors * Wastage of products in supply chain management * Poor and untimely reporting * Lack of automation |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Outsource the implementation of a web-based platform | * Significantly higher cost * Expertise already exists in house * Vendor’s lack of familiarity with our internal requirements |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Develop software internally | * Significant cost associated with software design * Timeframe required is too long |

#### APPROVALS

The signatures of the people below indicate an understanding in the purpose and content of this document by those signing it. By signing this document, you indicate that you approve of the proposed project outlined in this business case and that the next steps may be taken to create a formal project in accordance with the details outlined herein.

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Title** | **Signature** | **Date** |
| Timothy Schwartz | President and COO |  |  |
| Vaishnavi Peddiraj | Executive VP |  |  |

**Project Charter**

**General Information**

|  |  |
| --- | --- |
| ***Project Title:*** | ***Business Intelligence Implementation*** |
| ***Brief Project Description:*** | The purpose of this project is to implement a business intelligence solution which can make data-driven decisions, optimize business processes, and improve customer  experience. |
| ***Prepared By:*** | Vaishnavi Peddiraj |
| ***Date:*** | 02-19-2023 |

**Project Objective**

With variety of tools and techniques provided in Business Intelligence, the Ice Cream Shop Company can make well-informed, reliable, and timely decisions based on current real-time data. Different departments of the company can perform quantitative analysis, measure key performance indicators (KPIs) and use customer insights to identify new opportunities. The migration of technology will reduce overhead costs and expenses associated with managing these tasks currently requiring a large workforce. We will have all our employees comfortable with the software at the end of the project. Centralized and easily understandable data is provided to the employees which makes the non tech users also to understand business activities. This technology will help the company lower production wastage and boost productivity by assuring optimum operations. This enhances competitive intelligence, Market Intelligence, Social Media Intelligence, Conversion Ratio, Security and Data Integration. Increase in Sales and reduction in Supply chain wastage.

As for the deliverables, a comprehensive business requirements document (BRD) that outlines the specific data analysis and reporting needs of the organization. A detailed technical requirements document (TRD) that outlines the technical specifications of the BI solution. A functional and technical design document (FTD) that outlines the design of the BI solution. A centralized data warehouse that integrates data from all relevant sources and provides a single source of truth for the organization. Customized reports and dashboards that provide insights related to sales, inventory, customer behavior, and other relevant business metrics. An automated ETL process that collects, transforms, and loads data into the data warehouse. User acceptance testing (UAT) to ensure that the BI solution meets the business and technical requirements.

## Assumptions

The following assumptions apply to the BI Project. As project planning begins and more assumptions are identified, they will be added accordingly.

* Staff will be trained accordingly in data analysis and reporting tasks on the updated BI system.
* Funding is available for training.
* Funding is available for purchasing hardware/software for a web-based system.
* All department heads will provide the necessary support for successful project completion.
* Project has executive-level support and backing.

## Project Scope

* The BI solution will cover all business units and departments within the organization.
* The BI solution will use existing data sources, such as point-of-sale systems, inventory management systems, customer relationship management systems and other relevant sources.
* The BI solution will provide insights related to sales, inventory, customer behavior, and other relevant business metrics.
* The BI solution will be developed using industry-standard tools and technologies.
* The BI solution will be integrated with the company's existing IT infrastructure.
* The project will not involve any hardware or network infrastructure upgrades.

## Project Milestones

|  |  |
| --- | --- |
| **Milestones** | **Deliverables** |
| Project Plan Review and Completion | Planning and review of project |
| Project Kickoff | Discussing the Business case and project Charter |
| Stage I Complete | Business requirements gathering and analysis |
| Stage II Complete | Technical requirements gathering and analysis |
| Stage III Complete | Functional and technical design |
| Stage IV Complete | Development and testing |
| Stage V Complete | User acceptance testing |
| Stage VI Complete | Training and documentation |
| Closeout/Project Completion | Closing the Project |

**Impact Statement**

|  |  |
| --- | --- |
| **Potential Impact** | **Systems / Units Impacted** |
| Tools | In the future, we will only use BI instead of  spreadsheets, as it is more efficient and accurate |
| Processes | Anyone in the organization can access and analyze  up-to-date information whenever they need it, wherever they are, on a range of different devices |
| Roles and Responsibilities | The upgraded platform will be managed by the technical team, and we do anticipate a few changes to IT staffing requirements for a year during the project  implementation. |
| Hardware / Software | The Ice Cream Shop Company will be required to  purchase additional servers to accommodate the platform |

## Roles and Responsibilities

|  |  |
| --- | --- |
| **Sponsor:** Provides overall direction on the project. Responsibilities include: approve the project charter and plan; secure resources for the project; confirm the project’s goals and objectives; keep  abreast of major project activities; make decisions on escalated issues; and assist in the resolution of roadblocks. | |
| **Name** | **Email / Phone** |
| Vaishnavi P | [VPicecreamshop@gmail.com](mailto:VPicecreamshop@gmail.com) |
| **Project Manager:** Leads in the planning and development of the project; manages the project to scope. Responsibilities include develop the project plan; identify project deliverables; identify risks and develop risk management plan; direct the project resources (team members); scope control and change management; oversee quality assurance of the project management process; maintain all documentation including the project plan; report and forecast project status; resolve conflicts within the  project or between cross-functional teams; ensure that the project’s product meets the business objectives; and communicate project status to stakeholders. | |
| **Name** | **Email / Phone** |
| Ted G | [TGicecreamshop@gmail.com](mailto:TGicecreamshop@gmail.com) |
| **Team Member:** Works toward the deliverables of the project. Responsibilities include understand the work to be completed; complete research, data gathering, analysis, and documentation as outlined in the project plan; inform the project manager of issues, scope changes, and risk and quality concerns;  proactively communicate status; and manage expectations. | |
| **Name** | **Email / Phone** |
| Rishitha Y | [YRicecreamshop@gmail.com](mailto:YRicecreamshop@gmail.com) |
| Shivani S | [SSicecreamshop@gmail.com](mailto:SSicecreamshop@gmail.com) |

|  |  |
| --- | --- |
| **Customer:** The person or department requesting the deliverable. Responsibilities include: partner with the sponsor or project manager to create the Project Charter; partner with the project manager to manage the project including the timeline, work plan, testing, resources, training, and documentation of procedures; work with the project team to identify the technical approach to be used and the  deliverables to be furnished at the completion of the project; provide a clear definition of the business objective; sign-off on project deliverables; take ownership of the developed process and software. | |
| **Name** | **Email / Phone** |
| Nihal S | [NSicecreamshop@gmail.com](mailto:NSicecreamshop@gmail.com) |
| Unnati Y | [UYicecreamshop@gmail.com](mailto:UYicecreamshop@gmail.com) |
| Preethi G | [PGicecreamshop@gmail.com](mailto:PGicecreamshop@gmail.com) |
| **Subject Matter Expert:** Provides expertise on a specific subject. Responsibilities include maintain. up-to-date experience and knowledge on the subject matter; and provide advice on what is critical to  the performance of a project task and what is nice-to-know. | |
| **Name** | **Email / Phone** |
| Allen Pensin | [APicecreamshop@gmail.com](mailto:APicecreamshop@gmail.com) |

**Resources**

|  |  |
| --- | --- |
| **Resource** | **Constraints** |
| Project Budget | We have limited budget to complete this project |
| Time | We have just 3 months to complete this project |
| Human Resources | We don’t have an expert in our company on this  subject |

## Project Risks

|  |  |
| --- | --- |
| **Risk** | **Mitigation Strategy** |
| Data quality issues | the BI solution is only as good as the data it processes, and poor  data quality can lead to inaccurate insights and decisions. |
| Integration challenges | integrating data from multiple sources can be a complex process  that may require significant technical expertise. |
| User adoption | end-users may be resistant to change and may require extensive  training to use the BI solution effectively. |
| Scope creep | as business needs change, there is a risk that the project may  expand beyond its original scope and budget. |
| Technical issues | unforeseen technical issues may arise during the development  and testing phases of the project. |

**Success Measurements**

* This project meets will meet the Technical and Business requirements of the company.
* We can reduce the processing time by 30% after implementation. Resources and time will be saved which can be used for other important resources. Reduces overhead costs.
* The BI solution provides accurate, real-time, and comprehensive insights that help in making informed business decisions.
* The BI solution is user-friendly and easy to use for end-users, administrators and is integrated with the companies.
* Reduction of supply chain management losses over 40 percent.

## Signatures

|  |  |  |
| --- | --- | --- |
| **Customer:** |  |  |
| **Name** | **Signature** | **Date** |
| Nihal S | Nihal S | 02/19/2023 |
| Unnati Y | Unnati Y | 02/19/2023 |
| **Project Sponsors:** |  |  |
| **Name** | **Signature** | **Date** |
| Timothy S | Timothy S | 02/19/2023 |
| Vaishnavi P | Vaishnavi P | 02/19/2023 |
| **Project Manager:** |  |  |
| **Name** | **Signature** | **Date** |
| Vaishnavi P | Vaishnavi P | 02/19/2023 |
| Ted G | Ted G | 02/19/2023 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Name:** | **Project Number:** | **Prepared by: (Project Manager)** | **Date:** |
| The Ice Cream Shop Company | 690 | Vaishnavi Peddiraj | 4-14-2023 |
| **Customer:** | **Business Unit:** | **Contact Name:** | **Project Type:** |
| IT Project Management | 333 | Timothy Schwartz | Mini  Standard Complex |

|  |  |
| --- | --- |
| **INTRODUCTION** | The objective of this project is to implement a Business Intelligence (BI) system in The Ice Cream Shop Company to improve decision-making processes and increase business efficiency. The BI system will help to collect, store, analyze, and report on relevant data to support informed decision-making. |

|  |  |
| --- | --- |
| PROJECT OBJECTIVE/S | * Sales analysis: Analyzing sales data to identify trends and patterns, and track sales performance over time. * Inventory management: Monitoring inventory levels, identifying stock-outs, and optimizing inventory levels. * Customer analysis: Analyzing customer data to identify customer preferences, behavior, and purchase patterns. * Financial analysis: Analyzing financial data to track revenue and expenses and identify areas for cost savings. |

|  |  |
| --- | --- |
| **DETAILED PROJECT SCOPE** | |
| IN SCOPE | OUT OF SCOPE |

|  |  |  |
| --- | --- | --- |
| 1. BI can help the company analyze sales data to identify trends and patterns in customer behavior, such as which flavors are most popular, which days of the week are busiest, or which locations generate the most revenue. 2. BI can assist in tracking inventory levels, predicting demand, and optimizing ordering processes to reduce waste and improve profitability. 3. BI can help the company track customer behavior and preferences, identify the most valuable customers, and develop targeted marketing campaigns to improve customer retention. 4. BI can help the company monitor its competitors' activities and identify opportunities for differentiation or improvement. | | 1. BI Project typically does not involve payroll processing or other human resources-related tasks. While BI relies on high-quality data, the process of entering and maintaining data is typically handled by other departments and is outside the scope. 2. BI Project will not be involved in the maintenance and repair of equipment or physical assets. 3. BI Project will not be involved in ensuring the company legal compliances with local, state, or federal laws and regulations. 4. While BI Project can help identify areas for process improvement, but redesigning business processes is not included in the Project. |
| CLIENT ACCEPTANCE CRITERIA | * providing high-quality, delicious ice cream with a variety of flavors and toppings to satisfy a diverse range of customer preferences. * prioritize accessibility, offering convenient hours and locations to make it easy for customers to access their products. | |
| COST CONSTRAINTS | * the high cost of energy and utilities required to operate the business. * the cost of rent and real estate in prime locations can be prohibitively high | |
| COST SUCCESS CRITERIA | * achieving and maintaining profitability through effective cost management practices * optimizing pricing strategies to maximize profit margins, reducing operational costs through energy-efficient equipment and waste reduction measures, and monitoring inventory levels to prevent overstocking and minimize waste. * to diversify revenue streams by offering additional products or services, such as catering or online sales, to increase overall revenue and reduce reliance on in-store sales. | |
| PROCUREMENT CONSTRAINTS | * finding suppliers that meet the sustainability and ethical sourcing requirements, which could limit our ability to meet customer demand for eco-friendly or locally sourced products. | |

|  |  |
| --- | --- |
| RESOURCE CONSTRAINTS | * limited availability of high-quality and fresh ingredients, especially during off-seasons or in remote locations |
| SCHEDULE CONSTRAINTS | * during peak off – seasons, we need to reduce production levels and staff hours to avoid excess waste and maintain profitability. * seasonal fluctuations in demand, particularly in areas with cold or inclement weather during certain times of the year. |
| SCHEDULE SUCCESS CRITERIA | * efficient and timely production and delivery of ice cream products to meet customer demand. * establish a production schedule that maximizes output while maintaining quality standards and implement a streamlined order processing and delivery system to ensure that orders are fulfilled promptly and accurately. * regularly review and adjust production and delivery processes to optimize efficiency and ensure that customer demand is consistently met. |
| SECURITY IMPACT / NEEDS | * the protection of customer information and financial data. Company must implement secure payment processing systems and data encryption to safeguard sensitive information and prevent theft or fraud. * company must to comply with relevant regulations and standards related to data security and privacy to maintain customer trust and avoid legal repercussions. |
| SERVICE VALIDATION / TESTING: TYPES OF TESTS | * conducting regular taste tests and surveys with customers to gather feedback on the quality and appeal of ice cream products. * identify areas for improvement and make necessary adjustments to ensure that we are consistently meeting customer expectations. * regular audits of the production processes and equipment to ensure that we are maintaining quality standards and preventing contamination or other issues that could impact product safety and customer satisfaction. |
| TECHNICAL CONSTRAINTS | * the availability and reliability of equipment and technology systems. The company may face constraints related to the cost and maintenance of ice cream machines, refrigeration systems, and other production equipment, which could impact production capacity and product quality. * to invest in regular technology upgrades and staff training to ensure that they are keeping up with industry trends and providing the best possible customer experience. |

#### By approving the Scope Statement you are in agreement with the project scope as described herein.

|  |  |  |  |
| --- | --- | --- | --- |
| **STAKEHOLDER** | **NAME** | **SIGNATURE** | **DATE** |
| **PROJECT SPONSOR** | Timothy Schwartz | T Schwartz | 4-14-  2023 |
| **EXECUTIVE SPONSOR** | Ajay Datla | A Datla | 4-14-  2023 |
| **PROJECT MANAGER** | Vaishnavi Peddiraj | V Peddiraj | 4-14-  2023 |
| **TECHNICAL LEAD** | Jyosna V | Jyosna | 4-14-  2023 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Task Mode | Task Name | | Duration | Start | Finish | Pred | Resource Names |  | | | Apr 2, '23 Apr 9 | | | | | |
| W | F | | S | | T | T | S | |
| 1 |  | Kickoff Meeting | | 1 day | Sat 4/1/23 | Sat 4/1/23 |  | Ajay,Vaishu,ram,j |  | |  | **Ajay,Vaishu,ram,jay,Ted** | | | |  |  |
|  |
|  |  |  | | |
| 2 |  | Planning | | 7 days | Mon 4/3/23 | Tue 4/11/23 | 1 | Ajay,Vaishu,Ted |
|  | | | | |
|  | | | |  |  |
| 3 |  | Data collection and storage | | 7 days | Wed 4/12/23 | Thu 4/20/23 | 2 | Ajay,Vaishu |
| 4 |  | Data collection from all dpt | | 2 days | Wed 4/12/23 | Thu 4/13/23 |  | Ajay |
| 5 |  | Filtering and storing Data | | 3 days | Fri 4/14/23 | Tue 4/18/23 | 4 | Vaishu |
| 6 |  | Completing the task | | 2 days | Wed 4/19/23 | Thu 4/20/23 | 5 | Ajay,Vaishu |
| 7 |  | Software Installation | | 10 days | Fri 4/21/23 | Thu 5/4/23 | 3 | ram,jay,Vaishu |
| 8 |  | recognizing and replacing the old system | | 3 days | Fri 4/21/23 | Tue 4/25/23 | 3 | ram |
| 9 |  | installing all the required software | | 4 days | Fri 4/21/23 | Wed 4/26/23 | 3 | jay |
| 10 |  | Data transfer from old syste | | 2 days | Wed 4/26/23 | Thu 4/27/23 | 8 | Vaishu |
| 11 |  | Complete the task | | 2 days | Fri 4/28/23 | Mon 5/1/23 | 10 | ram |
| 12 |  | Testing | | 6 days | Tue 5/2/23 | Tue 5/9/23 | 11 | Ajay |
| 13 |  | Closing | | 2 days | Wed 5/10/23 | Thu 5/11/23 | 12 | Ted |
|  | | | | | | | | | | | | | | | | | |
| Project: Simple Project Plan Date: Sun 4/2/23 | | | Task Inactive Summary External Tasks  Split Manual Task External Milestone  Milestone Duration-only Deadline  Summary Manual Summary Rollup Progress  Project Summary Manual Summary Manual Progress  Inactive Task Start-only  Inactive Milestone Finish-only | | | | | | | | | | | | | | |
| Page 1 | | | | | | | | | | | | | | | | | |

m



, '23

Apr 16, '23

Apr 23, '23

Apr 30, '23

May 7, '23

May 14, '

M W F

S T T

1. M W F S T
2. S M W F S

**Ajay,Vaishu,Ted**

**Ajay**

**Vaishu**

**Ajay,Vaishu**

**ram**

**jay**

**Vaishu**

**ram**

**Ajay**

**Ted**



Project: Simple Project Plan Date: Sun 4/2/23

Task Split

Milestone Summary Project Summary Inactive Task

Inactive Milestone

Inactive Summary

Manual Task

Duration-only

Manual Summary Rollup Manual Summary

Start-only Finish-only

Page 2

External Tasks External Milestone Deadline

Progress Manual Progress



RISK MANAGEMENT PLAN

THE ICE CREAM SHOP COMPANY

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **REF / ID** | **P R E - M I T I G A T I O N** | | | | **Descriptions** | **P O S T - M I T I G A T I O N** | | | |  |
| **RISK** | **RISK SEVERITY** | **RISK LIKELIHOOD** | **RISK LEVEL** | **RISK SEVERITY** | **RISK LIKELIHOOD** | **RISK LEVEL** | **Risk Handling** | **ACCEPTABLE TO PR** |
| 1. | Data security breaches | UNDESIRABLE | POSSIBLE | HIGH | Implementing business intelligence requires access to sensitive data, and if proper security measures are not taken, it can lead to a data breach. | UNDESIRABLE | POSSIBLE | **Medium** | **MITIGATION** | **Yes** |
| 2. | High implementation cost | UNDESIRABLE | POSSIBLE | HIGH | Implementing business intelligence tools and infrastructure can be expensive, and there may be additional costs associated with hiring or training staff to use the tools. | UNDESIRABLE | POSSIBLE | **MEDIUM** | **MITIGATION** | **Yes** |
| 3. | Resistance to change | TOLERABLE | POSSIBLE | MEDIUM | Implementing business intelligence can require changes in the company's culture and processes, and there may be resistance from employees who are not used to working with data-driven insights. | TOLERABLE | IMPROBABLE | **MEDIUM** | **ESCALATION** | **Yes** |
| 4. | Data quality issues | UNDESIRABLE | POSSIBLE | HIGH | Business intelligence relies heavily on accurate and consistent data, and if there are issues with data quality, it | INTOLERABLE | POSSIBLE | **HIGH** | **MITIGATION** | **Yes** |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  | can lead to incorrect insights and decisions. |  |  |  |  |  |
| 5. | Lack of technical expertise | TOLERABLE | POSSIBLE | MEDIUM | Implementing business intelligence requires technical expertise, and if the company lacks the necessary skills, it may struggle to effectively use the tools. | TOLERABLE | IMPROBABLE | **MEDIUM** | **ESCALATION** | **Yes** |
| 6. | Integration issues | TOLERABLE | IMPROBABLE | MEDIUM | Integrating business intelligence tools with existing systems can be challenging, and there may be issues with compatibility and data transfer. | TOLERABLE | IMPROBABLE | **MEDIUM** | **MITIGATION** | **Yes** |
| 7. | Training and adoption | Undesirable | IMPROBABLE | MEDIUM | Employees may need training to effectively use business intelligence tools, but overall adoption is not likely to be a major challenge. | INTOLERABLE | IMPROBABLE | **HIGH** | **TRANSFER** | **Yes** |
| 8. | User interface design | TOLERABLE | POSSIBLE | MEDIUM | While a well-designed user interface is important for ease of use, it is unlikely to be a major risk.  Availability of data: As long as the company has access to the necessary data, this is unlikely to be a major risk. | INTOLERABLE | POSSIBLE | **LOW** | **MITIGATION** | **Yes** |

**Communication Plan:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Event** | **Description** | **Purpose** | **Frequency** |
| 1 | Project Team Meeting | Meeting involving all team members, to  discuss the work in-progress / recently completed / coming up | To keep the team informed of the project  status and ensure that issues, risks or changes are raised early on. | Weekly |
| 2 | Project Board Meeting | Formal meetings held with the Project Board to assess the overall status of the project. | To determine whether the project has been completed and met the final requirements of the customer. | End of project |
| 3 | Phase Review Meeting | Formal meeting held at the end of each phase,  to determine whether the quality of the deliverables produced is satisfactory. | To control the progress of the project  through each phase in the lifecycle and boost its chance of success. | End of each major phase |
| 4 | Team Sponsor Meeting | Formal meeting held every week to convey the information about the project. | To determine whether the project in control or not | Every Week |
| 5 | Technical Head | Formal or virtual meeting to know the technical information. | To discuss about the technical information. | Every week (If needed) |
| 6 | Customer Meetings | Casual meetings with the customers to discuss common points. | To know the effects of the project on the customers. | Monthly |
| 7 | Vendor | Formal of virtual meetings to know the work progress. | To know the updates of work progress. | Weekly |

