Presented by: Anne Zaremba, fRITZ WEISS, AND CAROL SWALES

sTRATEGIC INTERVENTIONS



Project Communication Plan

FINANCEMASTER IMPLEMENTATION

# Prepared By

|  |  |
| --- | --- |
| **Document Owner(s)** | **Project/Organization Role** |
| Carol Swales | Co-Project Manager |
| Fritz Weiss | Co-Project Manager |
| Anne Zaremba | Co-Project Manager |

# Project Charter Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Change Description** |
| 1.0 | 4/7/2013 | Carol Swales | Document created |
| 1.1 | 4/12/2013 | Fritz Weiss | Co-PM proof and comments on document |

Table of Contents

[Prepared By 1](#_Toc353490241)

[Project Charter Version Control 1](#_Toc353490242)

[1 Purpose 3](#_Toc353490243)

[2 Project Charter Overview 3](#_Toc353490244)

[3 Stakeholders 3](#_Toc353490245)

[3.1 Internal Stakeholders 3](#_Toc353490246)

[Project Sponsor - Bill D’Angelo 3](#_Toc353490247)

[Practice Group Leaders - Bill D’Angelo, Joe Graham, Sam Hirschberg, Mark Stanton, Jim Slater 3](#_Toc353490248)

[CFO/HR - Jim Slater 4](#_Toc353490249)

[Controller - Donna Donato 4](#_Toc353490250)

[HR Manager - Tim Snyder 4](#_Toc353490251)

[IT Manager - Eric Gilmore 4](#_Toc353490252)

[Project Planning Team - Carol Swales, Fritz Weiss, Anne Zaremba, TBD 4](#_Toc353490253)

[Accounting Staff 4](#_Toc353490254)

[Administrative Staff 4](#_Toc353490255)

[Engagement Principals 5](#_Toc353490256)

[3.2 external stakeholders 5](#_Toc353490257)

[Auditors - Heinrich & Olds 5](#_Toc353490258)

[FinanceMaster Technical Account Manager (TAM) 5](#_Toc353490259)

[Onsite FinanceMaster Team 5](#_Toc353490260)

[4 Communication Technology 5](#_Toc353490261)

[**6** Issue Log 6](#_Toc353490262)

[**7** Decision Log 6](#_Toc353490263)

[**8** Variance Analysis 6](#_Toc353490264)

[10 communication matrix 0](#_Toc353490275)

# Purpose

This Communications Management Plan document sets the framework for communications for this project and will serve as a guide throughout the project. This plan includes a communication matrix which maps the communication requirements of this project. It also includes a project team directory which identifies key project team members and defines their roles.

The purpose of the Communications Management Plan for the ImplementationProject is to:

* Define the communication requirements for the project
* Understand stakeholder requirements, and to distribute information accordingly
* Identify the communications paths within the project structure
* Ensure all information is communicated in a consistent, accurate, and timely manner

The Communications Management Plan supersedes the Stakeholders Communications Plan.

# Project Charter Overview

Strategic Intervention’s financial systems allows each of its practice groups to manage their own timekeeping, billing, and financial reporting with no integration with the other business lines. This has caused a large discrepancy in the consistency of reporting metrics and overall has led to the decrease of the firm’s profitability during a time when their client engagements are increasing. The Directors of Strategic Interventions have approved the purchase of FinanceMaster, a centralized modular financial system, to standardize the firms accounting and finance departments. For more detailed information on our charter please see the Project Charter document.

# Stakeholders

Due to the broad impact of this project across the company there are a large number of internal stakeholders, as well as a few external stakeholders.

## Internal Stakeholders

### Project Sponsor - Bill D’Angelo

Bill D’Angelo is the CEO and project sponsor. He will meet with the team for status and prior to gate reviews, and with the project manager on a weekly basis or more frequently as needed.

### Practice Group Leaders - Bill D’Angelo, Joe Graham, Sam Hirschberg, Mark Stanton, Jim Slater

All of the Leaders will have input and approval of firm’s process changes around client billing and time reporting, as well as the project budget and any changes.

### CFO/HR - Jim Slater

As the ultimate recipient of the financial system Jim will need to have input into which FinanceMaster modules are selected and the schedule for rollout. As the head of HR, Jim will also approve and be involved in any staffing changes and employee training.

### Controller - Donna Donato

Donna manages the accounting team and will need to be involved in the details of business process changes, selection of FinanceMaster modules and schedule, and transition of data from the old to new system, and staffing her team appropriately according to the process changes.

### HR Manager - Tim Snyder

Tim will be involved in any staffing changes. He will also have input into any changes around time reporting. He will also make sure the FinanceMaster vendor team has appropriate access to the facilities and a temporary work space for the duration of their engagement.

### IT Manager - Eric Gilmore

Eric will need to review the FinanceMaster technology to ensure that it is compatible with the current IT infrastructure. He will also need to review the implementation plan and ensure he or his staff can support and supervise the FinanceMaster team while they are working on-site.

### Project Planning Team - Carol Swales, Fritz Weiss, Anne Zaremba, TBD

Regular weekly meetings and status emails, decision log, change log, meeting minutes. The FSI Project shall be led by SI employees Carol Swales, Fritz Weiss and Anne Zaremba (Project Managers, PM’s). Technical installation shall be executed by a specific FinanceMaster team, completing all tasks required to make the systems work as specified for SI.

We have up to four FTE available for the project implementation team.  The project managers will determine the project personnel as the tasks are identified in the WBS and it becomes clear what skill sets are needed. Available resources are outlined in the Staffing Options document.

### Accounting Staff

The accounting staff may provide input on system needs and processes around schedule, data transition, and continuing to complete finance/accounting deliverables during the transition. They will need to be kept informed of process and procedural changes.

### Administrative Staff

The administrative staff are currently creating the client invoices based on information from the principals. They will need to provide information on the current processes to minimize disruption and data on existing client contracts that will need to be honored. They will also need to be kept informed of process and procedural changes around client billing.

### Engagement Principals

The engagement principals provide the data for client billing. They will need to provide information on their current processes and procedures for this, as well as current client contracts to be honored. Their input will be used when determining business procedural changes around client billing, and they will be kept informed of those changes.

## external stakeholders

### Auditors - Heinrich & Olds

Auditors will be kept informed business procedural changes, the schedule and specific cutover dates.

### FinanceMaster Technical Account Manager (TAM)

The project team will work with the FinanceMaster representative for any clarifications or additional details needed to determine which modules to purchase.  Additionally the project team will work with the TAM to schedule rollout and work out any other engagement details or specific needs of the team. TAM will provide a detailed scheduled for the engagement.

### Onsite FinanceMaster Team

The Onsite FinanceMaster team will work directly with the IT department and assigned accounting representative. They will provide a high level schedule for their engagement and outline any specific needs. They will provide status daily at the end of the day to the project team.

# Communication Technology

The project team uses a variety of communication methods and technologies to facilitate efficient communication including meetings, telephone calls, email, fax, and websites, based on following factors: stakeholder communication requirements, available technologies (internal and external), and organizational policies. This project is confidential, at no time should any project communication occur outside of company assets.

The communication methods that will be used throughout the project are:

* Project status documents in Microsoft Word
* Project planning and control documents in Microsoft Word or Excel
* Strategic Interventions Email
* Meetings (In-Person or Virtual)
* Presentations in Microsoft PowerPoint
* [Microsoft SharePoint site](http://www.pbs.org/wgbh/masterpiece/programs/character-hub/series/downton-abbey-season-3/character/cora-crawley_s505) to keep all the team’s information in one place and accessible

Meetings in particular are often the most effective way to disseminate information to project stakeholders. Before planning a meeting, the project manager or assigned team member should consider the communication objectives carefully and choose a meeting format that will meet the objectives.

The Project Manager will take a proactive role in ensuring effective communications on this project. All participants are expected to adhere to these guidelines at all times to prevent unnecessary or ineffective communication. A Communications Management practices guide, template, and checklist can be found on the company’s intranet site. The communications requirements are documented in the Communications Matrix.

# Issue Log

An issue log is included in weekly meeting agendas to draw attention to issues that may impact original deadlines. The issue log is a living document that is used for both early detection of potential issues, and highlighting of current issues. It triggers the necessary action plan that is documented in decision log. The [issue log](http://www.pbs.org/wgbh/masterpiece/programs/character-hub/series/downton-abbey-season-3/character/robert-crawley_s505) is maintained by the project manager on the team’s SharePoint site.

# Decision Log

The decision log is updated after the issue log, where the decision/action plan, decision maker(s), target completion date, responsible individual(s) and status are documented for issue resolution. At each project status or team meeting, the decision log is reviewed and updated. The project manager is responsible for maintaining the decision log. The [decision log](http://www.pbs.org/wgbh/masterpiece/programs/character-hub/series/downton-abbey-season-3/character/violet-crawley_s505) is maintained by the project manager on the team’s SharePoint site.

# Variance Analysis

Variance analysis is applied to take action that will correct the problem within the original budget or justify a new estimate, by measuring cost performance in relation to work accomplished. This is required to ensure that both cost budgeting and performance scheduling are based on the same database.

Both the cost and schedule variance (CV and SV respectively) will be monitored and the following reports will be generated and reviewed monthly:

* Performance report – This report will cover the physical progress to date, and include the budgeted cost for work scheduled (BCWS), the budgeted cost for work performed (BCWP) and the actual cost for work performed (ACWP).
* Status report – This report will cover the current status of the project, and will include CV and SV.
* Projection report – This report will contain the estimate at completion (EAC), estimated cost to complete (ETC), the cost performance index (CPI) and the schedule performance index (SPI).
* Exception report – This report will identify exceptions, problems or situation that exceed the predetermined threshold limits on variances, cash flow, resources assigned etc.

If the variance analysis highlights an area that exceeds the threshold limits set in the project charter, the project and functional managers will work together to identify the cause of the problem, and suggested corrective actions.



# 

# communication matrix

