Project Scope Statement, Priority Matrix, & Communication Plan

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Project MetaGuest Scope Statement

1. Project Objective:

Develop an automated, self-emailing, report that focuses specifically on the current state of the Target guest through trending key meta metrics about guest data. The project is to be fully completed, iterated, and user functional by December 2014 and resources are all to be derived internally at Target at no outside additional cost.

2. Deliverables:

MetaGuest is a technical project that is better suited for a process breakdown structure (PBS) broken in to key phases. The deliverables will follow each major phase and are outlined below-

* Analysis – Establish key metrics to be trended overtime, and the time interval for which the analysis will be based. The metrics are not to exceed fifteen an shall have no less than ten in the report.
* Design – Have three different dashboard designs and feedback from key stakeholders and intended users.
* Construct – Final version of code vetted, documented, and synthesized with reoccurring reporting team.
* Test – Run report over four weeks, with at least three participating team member and no more than seven, to assess overall effectiveness as well as make iterations.
* Rollout – Schedule, present, and collect feedback on three different presentations for key stakeholders as well as intended users.

3. Milestones:

In developing important milestones for MetaGuest, natural benchmarks within Target process flow are documented below-

* March 21 - Project Charter Acceptance, Manager
* March 31 – Multi-Department Project Acceptance
* May 14 – Key Metrics Established
* June 14 – Dashboard Design Approved
* July 30 – Final Documentation of Standardized Code
* August 18 – Final Iterations Complete
* September 15 – Presentations
* October 15 – End User Feedback
* November 15 – Hand in Completed Project Documentation

4. Technical Requirements:

Target is in the midst of migrating from an IBM database to Teradata, and will require duplicative coding efforts and specifications in order to meet the project objective within the timeframe

* Establish how stable guest logic will be applied to MetaGuest
* Define where MetaGuest will reside post-project
* Create coding that minimizes creating irrelevant tables
* Define whether excel, SAS, or Tableau is the best dashboard tool
* Reporting requirements must meet specified bandwidth
* Table pulls must follow changing requirements
* Code needs to be written in an EDW and ADW format
* Delivery method must be a push rather than a pull for end users

5. Limits and Exclusions:

In an effort to focus on the expectations of MetaGuest, the limits and exclusions are detailed below:

* MetaGuest will contain only Guest data, and no POS data
* The report is objective across all divisions without customization
* End users are responsible for ad-hoc additional metrics
* Creating a storage repository is not included in MetaGuest
* Intended end users are Guest Insights and Division Insights
* Healthcare data will not be included
* Target Canada data will not be included
* Email notification and centralize posting is the means of delivery

6. Review with Management: James Nelson

Before moving forward, communication and iterations to the project scope statement must be resolved in an effort to be of one accord. Deadline for Review with Management resolve is 1/23/2013.

MetaGuest Priority Matrix

Project efficacy is helpfully demonstrated from the graphic below:

Quality

The priority matrix below details how the three attributes are prioritized.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Time | Performance | Cost |
| Constrain | X |  |  |
| Enhance |  | X |  |
| Accept |  |  | X |

Accept: Tolerable *not* to meet the original parameters.

Enhance: During the project, enhancements can be made to this parameter.

Constrain: This parameter must be met.

MetaGuest Communication Plan

The project scope statement is the first communication piece that needs to be agreed upon by management. Additional information needed for the success of MetaGuest is detailed below:

Reporting Requirements- Desired metrics, calculations for metrics, and interval requirements need to be gathered in the analysis phase. The project manager will refine the requirements with the key manager and finally communicated to a few of the end users. The information will be stored on the project managers folder on Target’s public hard drive space. Unless noted, the information is public, but does not need to be broadcasted. The final reporting requirements will be communicated with the end users at the end of the analysis phase in the monthly status meeting.

Design Information Communication – The Reporting Team will need to know the established reporting requirements prior designing the report for MetaGuest. A PowerPoint will be assembled by the Project Manager to communicate the reporting requirements, which will be stored in an Excel Table. There are no privacy concerns for the reporting team. The information will be communicated in a presentation with hard copied available and soft copies sent out after the meeting.

Construction Information Communication – Writing the code for MetaGuest will require a few analysts. SAS will be the primary tool for writing the code and communication will be done in person and through email. At this point authors of the code will include James Nelson, Jacob Yunker, Daniel Prusinski, and Senthilkumar Subramanian. It is vital that the code be well documented by each programmer so that collaboration ensues. Weekly iterations will be highlighted in an email with documentation communicating why the changes were necessary.

Testing Information Communication – As the report is tested, users will record comments and suggestive iterations on a provided form electronically. The goal is to have a seamless turnaround time, and not become bogged down with expansive changes. Potential changes will be vetted with management before making final iterations in a meeting with the project manager. The presentation will entail a PowerPoint presentation and soft copy in the form of word document tracking proposed changes.

Rollout Communication – The rollout will take place in a monthly team meeting, and management will introduce MetaReport to the whole team. This will be done in a PowerPoint presentation, and the end users present will get a copy of the actual report during the meeting. At the end of the meeting, the end users will have a physically provided form to fill out seeking feedback and general comments. These comments will be synthesized by the project management into a Word document and shared with the manager in an in person meeting.

Stakeholder Register

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| What Information | Target Audience | When | Method | Tool for Communication |
| Scope Statement | Project manager, key stakeholders | Once, first week | Email with hardcopy | Word |
| Project Plan | Key stakeholders, management | Once, mid March | Email, hardcopy | Word |
| Key Metric Findings | End Users | Weekly during analysis phase | Email, and presentation | Word, Powerpoint |
| Milestone Update | Project manager, key stakeholders | Biweekly | Email | Office |
| Project Update | Manager | Weekly | In person | Word |
| Cross-functional team update | Reporting, Guest & Division Insights | Monthly | In person meeting | PowerPoint with Word copy |
| Design Template | Manager, End Users | Weekly, during Design Phase | Working meeting, and email | PowerPoint and Word/Tableau |
| Developed Code | Data Analysts | When needed during construct and test phases | Email, text editor | SAS |
| Beta MetaReport | Manager, Testing Team | Weekly during testing phase | Email, in person | SAS, and email dashboard |
| Issues and Delays | Manager, key stakeholdes | When needed | Email and meeting | Word, Office |
| Accepted Changes | Project Manager | When needed | Email or meeting | Word, Office |
| Final Product | End Users, and Management | Weekly, in rollout phase | Email or centralized location | SAS, or Tableau |

Project Proposal

Target Corporation is a billion dollar retail company. With over 1,200 stores nationwide, millions of guests shop Target daily. One strategic initiative senior leadership has road-mapped for 2014 is deepening guest engagement. From this initiative, management is open to receiving project proposals and plans. Management within my department, Merchandising and Marketing Business Intelligence (MMBI), has asked me to create a project plan for better defining and monitoring overall guest behavior data at target in the form of a report that shows key metrics about our guests over time.

I will name this project MetaGuest based on the overall desired outcome for information about guest data to be fed to team members in a concise report. As of January 8, 2013 my manager, James Nelson, is the official project sponsor. The current stakeholder groups include the following:

Guest Insights (GI) – Target’s MMBI team that represents guest data.

Division Insights – Similar to GI, but works with merchandising divisional leadership on guest data requests.

Reporting – Coordinates and executes reporting for MBI.

Business Data Quality (BDQ) – Represents Target’s importation and cleaning of data.

Division Insight Leaders (DILs) – Communicate the desired outcomes for guest data.

Each stakeholder represents a direct impact point for the project’s overall success.

Better technology and analytical capabilities has allowed businesses unprecedented access to consumer information, which translates to intimately knowing one’s target market. As Target aims to meet growing consumer demands, understanding changing behaviors aptly translates to thriving and surviving in the retail environment. Currently, Target has built many tools for extracting guest information and classification categories for different types of guests. The next step for Target reaching its goal of deepening guest engagement through data-driven analytics is understanding changes in guest behavior and predicting future outcomes. The overall value project MetaGuest brings to Target is the next step in analytical capability for Target through quantifying guest behavior through time.

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• Key project constraints (cost, schedule, budget, resources)  
• Expectations, assumptions and exclusions, where appropriate  
• Project organization, team members, Responsibility Assignment Matrix (RAM)  
• Any other helpful information at this point

Elements contributing to “adequate complexities” of a project include:

• A number of sponsors, stakeholders, funding sources  
• Several deliverables built by a number of people, preferably from a number of different organizations (internal or external to your own organization, contractors, consultants, etc.)   
• Several concurrent, interdependent activities. You need activities that lead to multiple activities (burst nodes) and activities that that lead to a single activity (merge nodes)

For this week’s assignment, propose a project that you will use as the basis for the weekly assignments. At the end of course, you will write a complete and detailed project plan that will incorporate the weekly assignments and make a case for this project getting the green light for launch. For this week, explain your proposed project in approximately 500 words. Explain the objective of the project (e.g. have a memorable party, build a bedroom and bath addition to summer home) and demonstrate that there will be sufficient complexity to allow you to use project management tools. Also, present evidence that shows you have the knowledge you need to make realistic estimates about both task times and costs. Think of me as your boss, even if this is a personal project, to whom you have to show that this is good project for the purposes of using project management practices.

You will find a rubric, of sorts, in Course Content\Session 1\Session Reading (PRED475 Project Plan Assessment.pdf). I will use this rubric in assessing your final project plan/proposal submission. I suggest you use it throughout the Course to do the same. Each row will be a component of the proposal that will be covered and will be an assignment during the course (for the most part). The columns are the degree or effectiveness that the topic is covered. I encourage you to consider how you intend to cover these components while defining the project you adopt for development throughout the course.

Submit this proposed project for instructor approval. However, we may need to discuss some changes to the project to ensure it is suitable for the learning goals of this course.

In building the Final Project Plan Proposal, this input deserves a place in the Appendix

## Executive Summary Final Week

## Project Scope Statement

## Priority Matrix

## Work Breakdown Structure

## Gantt chart (Baseline)

## AON Network Diagram

## Project Baseline Budget

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