

# Project Charter

<b>Project Title:</b>	<b>Systems Migration Project</b>	<b>Project ID:</b>	<b>JDMB630601</b>
<b>Sponsoring Organization:</b>	<b>J.D. Monster Bank</b>	<b>Sponsor Representative:</b>	<b>Yash Vardhan Sharma</b>
<b>Start Date:</b>	<b>07/01/2017</b>	<b>End Date:</b>	<b>06/30/2018</b>

## 1. Project Stakeholders:

Position	Title/Name/Organization	Phone	E-mail
<b>Sponsor Representative</b>	VP Information Technology Yash Vardhan Sharma J.D. Monster Bank	+1(979)985-8287	yashvardhan@jdmb.com
<b>Program Manager</b>	Engagement Manager Rituparna Das J.D. Monster Bank	+1(979)985-8289	rituparnadas@jdmb.com
<b>Project Manager</b>	VP Data Management Jalaj Ranjan Pandey J.D. Monster Bank	+1(312)477-9633	jalajpandey@jdmb.com
<b>Technical Manager</b>	Senior Data Manager Jacob Miller J.D. Monster Bank	+1(352)456-9093	jmillier@jdmb.com
<b>Project Coordinator</b>	Technology Associate Katherine Scott J.D. Monster Bank	+1(979)985-8289	katscott@jdmb.com
<b>IT Support Administrator</b>	Technology Consultant Samantha K. J.D. Monster Bank	+1(979)985-8280	ksamantha@jdmb.com
<b>Network Support Team Lead</b>	Network Administrator Ajith Suman J.D. Monster Bank	+1(352)456-9875	ajihsuman@jdmb.com
<b>Infrastructure Provider Contractor</b>	TBD	--	--
<b>Training Manager</b>	TBD	--	--

<b>Bank Representatives</b>	TBD	--	--
<b>Customer Engagement Strategist</b>	TBD	--	--

## 2. Executive Summary

- Develop a business process to enable secure and successful migration of banking data of all small banks acquired by J.D. Monster Bank.
- Devise virtual project teams leveraging state of the art, worldwide network to ensure the project operates 24x7.
- Ensure that the system migration of the banking systems do not affect the existing customer base during the project execution.

## 3. Project Purpose

### 3.1. Business Need/Problem

- Lack of cohesion in technology implementations between J.D. Monster and other acquired banks.
- Banks acquired still use outdated mainframe systems for operations.
- A single global banking platform is in line with J.D. Monster's objective of ensuring consistent implementation of policies and better revenue generation opportunities.

### 3.2. Business Objectives

<i>Strategic Plan Element</i>	<i>Project Business Objectives</i>
Determine migration strategy	Create a process to successfully migrate smaller bank information from host mainframe system to J.D. Monster Bank's real time, cloud based banking networking system.
Design virtual team structures	Design a functional model to create virtual teams utilizing different time zones to ensure around the clock operations.
Determine project execution costs	Design a detailed project cost estimation including project planning, project execution, implementation and post implementation cost estimation and related details.
Develop risk mitigation strategy	Identify any possible risks for project planning and implementation and define clear mitigation strategies for each case.
Eliminate outdated technology	Eliminate usage of the mainframe system and other outdated

	technological implementations in the acquired banking systems by securely migrating onto the cloud-based system.
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## 4. Project Overview

### 4.1. Project Description

J.D. Monster Bank, based out of San Francisco, California aims to develop a business process to enable secure and successful migration of banking data of acquired banks. Leveraging state of the art, worldwide network, J.D. Monster targets to achieve the migration by creating virtual teams consisting of system analyst experts, programmers, database analysts and information technology assistants. To ensure the successful completion of the project, J.D. Monster CEO Mel Faesance has brought in a subject matter expert, I. Noitall to lend his expertise to the development group.

Project focusses on smooth transition of customer data from different technical implementations to a uniform cloud based infrastructure without affecting the existing user base for better operation and maintenance purpose as a unified system. Project aims to be completed within one fiscal year with a budget allocation of \$350,000 per banking system migration.

### 4.2. Scope

The scope of the project would be to migrate data from all smaller banks acquired by J.D. Monster Bank into one system keeping in mind that the project targets to complete 10 migrations within the first fiscal year, i.e. from June 30 –July 31. The project is expected to start on July 1, 2016 and will be completed by June 30, 2016 and aims to successfully migrate information of ten banks into the J.D. Monster Bank system within the first fiscal year and financial estimate per migration is \$350,000.

The project aims to identify and analyze requirements for devising a successful working model for virtual teams. Proposing shift to cloud based technology system, which shall minimize dependency on the existing mainframe system. Delivering a secure transition from old technology to the new one, and at the same time ensuring that this new technology is upholding integrity, security, and consistency. The project should contain properly structured project schedule and should be accompanied with documents once completed.

### 4.3. Assumptions

It is assumed that:

- Virtual team members have the required expertise to perform the tasks.
- Time estimated for one successful migration is enough.
- Costs estimation done are accurate.
- Individual departments will provide the required support.
- Technical failures have proper back up plans.
- Strategy for the virtual teams will work out with the team members.

#### 4.4. Constraints

- Project should be worked out with financial constraint as not to exceed the estimated \$350,000 per migration.
- A time constraint of completion of project within one fiscal year i.e., by June 30, 2016
- Common technical standards and performance constraint to be achieved for seamless execution of the project.

### 5. Project Requirements / Deliverables

- Establishment of the virtual teams with system analysts, IT technicians and database administrators successfully functioning in each team.
- Migration of one bank at a time and validation of the process and strategy after each migration with suggested improvements on each iteration.
- Successful integration of ten systems by the end of the first fiscal year.
- Migration of customer bank accounts securely from the mainframe host system to the real-time cloud based system.
- Project migration costs per bank to be limited under \$350,000.
- Secure integration of each migration with the existing banking system.

### 6. Project Management Milestones and Deliverables

<i>Milestone / Deliverable</i>	<i>Estimated Date</i>	<i>Responsible Individual</i>
Devise plan with virtual teams	07/15/2017	Jalaj Ranjan Pandey, Yash Vardhan Sharma, Rituparna Das
Migration of the first bank	09/30/2017	Jalaj Ranjan Pandey, Yash Vardhan Sharma
Determine loopholes and problems	01/10/2017	Rituparna Das
Implement revised plan on the next bank	12/31/2017	Jalaj Ranjan Pandey, Yash Vardhan Sharma
Plan implementation on the remaining banks	06/30/2018	Rituparna Das, Jalaj Ranjan Pandey, Yash Vardhan Sharma

### 7. Costs / Budget

<i>Purpose</i>	<i>Amount</i>	<i>Source</i>
Training of virtual team	\$50,000	First Estimation using the experiences of Mr. I Noitall.
Migration from main frame to cloud technology	\$300,000	Initial budget estimate (to be revised with detailed cost estimation in future)

## 8. Personnel & Other Resources

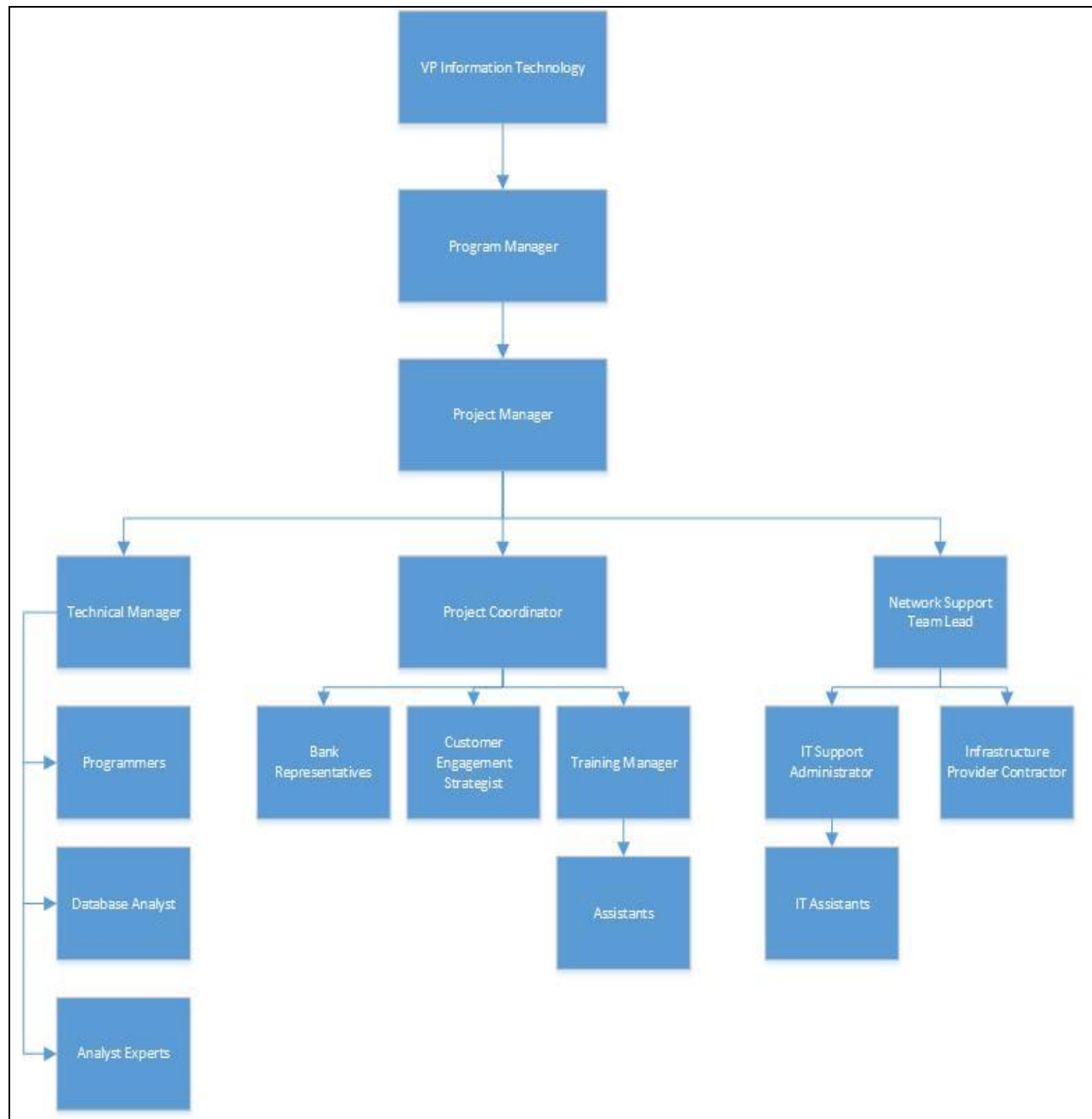
<i>Resources</i>	<i>Description</i>
<i>Project Team</i>	<ul style="list-style-type: none"><li>• Yash Vardhan Sharma</li><li>• Rituparna Das</li><li>• Jalaj Ranjan Pandey</li></ul>
<i>Support</i>	J.D. Monster Bank technical support team; acquired bank's technical support teams
<i>Facilities</i>	Datacenter, J.D. Monster Bank, NY; Stanford Labs; Acquired Bank's facilities
<i>Equipment</i>	Database Servers, Cloud Services, Facilities, Information Technology systems (including computing centers, kiosks, networking hardware)
<i>Software Tools</i>	Cloud Data Services, Microsoft Servers, Windows Software

## 9. Project Risks

- Technical problems leading to unsuccessful migration from mainframe to cloud based system.
- Lack of expertise and coordination in virtual teams.
- Lack of appropriate funding for the entire migration process.
- Breach of security during the integration and migration process.

## 10. Project Organization

### 10.1. Project Organization Chart



## 10.2. Roles & Responsibilities

Stakeholder Title	Name	Roles & Responsibilities
Sponsor Representative	Yash Vardhan Sharma	Focuses on realization of benefits, champions the cause of the project, coordinates with

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		other sponsors and provides feedback for the betterment of the project.
Program Manager	Rituparna Das	Engages in collaboration of the project team strategies with the teams from different banks undergoing the migration to carve out strategies for successful implementation and seamless transition.
Project Manager	Jalaj Ranjan Pandey	Defines and clarifies project scope, develops the project plan and schedule and devises policies and procedures to obtain the project objectives.
Technical Manager	Jacob Miller	Defines and sets working standards for individuals in the project team. Establishes technical standards and procedures for all the tasks defined in the project plan in detail.
Project Coordinator	Katherine Scott	Coordinates within and among different teams to ensure successful project plan implementation. Records grievances and complaints of project members, provides solutions to mitigate discrepancies in the team.
IT Support Administrator	Samantha K.	Provides on-demand Information technology before, during and after the migration process.
Network Support Team Lead	Ajith Suman	Ensures network related facilities for the complete process encompassing both software and hardware requirements in collaboration with IT Support team.
Infrastructure Provider Contractor	TBD	Delivers high quality infrastructure related supplies during the complete project execution.
Training Manager	TBD	Engages in designing a training plan for the bank representatives to make sure that they are aware of the migration process and a trained on the new system once the migration is completed.
Bank Representatives	TBD	Ensures that they are well informed of the migration project status and are well equipped with the new system once migration is completed.
Customer Engagement Strategist	TBD	Develops strategy for keeping customers informed about the ongoing migration and ensuring that the project results in minimum or no impact on the banking user base.

## 11. Approval Signatures

<i>Position/Title</i>	<i>Signature/Printed Name/Title</i>	<i>Date</i>
<b><i>Sponsor Representative</i></b>	Yash Vardhan Sharma VP Information Technology	8 <sup>th</sup> February, 2017
<b><i>Program Manager</i></b>	Rituparna Das Engagement Manager	8 <sup>th</sup> February, 2017
<b><i>Project Manager</i></b>	Jalaj Ranjan Pandey VP Data Management	8 <sup>th</sup> February, 2017