FPD Drinking Metrics Project Plan

Prepared for: FPD Beverage Company

Prepared by: Vicki YE

Date: 06/30/2024

Project Sponsor: Paul Reporting, CFO

Executive Oversight Committee (EOC):

Barbara Coffee, CEO

Paul Reporting, CFO

Frank Modruson, CIO

Steve James, VP Marketing

Coco Lee, Legal Counsel

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1. Executive Summary

A concise overview of the project's purpose, objectives, key deliverables, budget, timeline, and conclusion.
Importance: Enables executives to quickly understand the project's value, scope, and alignment with organizational goals, and serves as the basis for approval.

1.1 Business Problem

The current sales and operations information systems at FPD Beverage Company are insufficient for management decision–making. This has led to inaccurate forecasts, incomplete or delayed shipments, and dissatisfied customers. The potential loss of these clients could significantly impact FPD's $350 million annual revenue.

1.2 Proposed Solution

The FPD Drinking Metrics (FPD DM) project will develop a cloud–based metrics dashboard using QlikSense AI tools. The dashboard will analyze product line sales, packaging performance, and distribution metrics. The dashboard will include the following features:

- Product Line sales analysis;
- Packaging performance by product line analysis;
- Product Line by customer analysis;
- Order delivery performance by product line and customer;
- Distribution center shipping performance to customers.

Any additional features may be explicitly included if there is sufficient bandwidth in the project lifetime. In addition, this dashboard will be available at all times for anyone from Marketing and Sales.

1.3 Budget Request

We request $250,000, and a 10% contingency for risks, to complete this project within six months (July 1st–December 31th).

1.4 Key Assumptions

- Internal team members are available at least part–time for six months
- AI tools and QlikSense licenses are ready for use. The AI tools training will be completed on time and used effectively by the team.
- Minimal involvement from end–users is required during development.
- Any third–party consultants engaged will adhere to the fixed–price model and provide timely services

1.5 Conclusion

By creating a dashboard in 6 months, $250,000 budget to better forecast the company's performance and adjust accordingly based on the insights found, FPD DM will allow FPD Beverage Company to retain its customers, increase predictability in its pipeline, and maximise both profitability and customer satisfaction. It will resolve a significant portion of the current issues faced by FPD Beverage Company and allow the company as well.
This plan demonstrates the feasibility, alignment, and resourcefulness of the proposed solution. Approval is requested to proceed to the execution phase.

2. Project Scope Statement

Defines the project objectives, deliverables, technical requirements, constraints, exclusions, and assumptions.
Importance: Provides clarity on what is included and excluded from the project, ensuring alignment between stakeholders and the project team.

2.1 Project Objective

The objective of the FPD Drinking Metrics (FPD DM) project is to design and implement a real-time metrics dashboard to improve management's decision-making abilities by providing timely, accurate insights into sales performance, order delivery, customer data, and operational efficiencies. The project will utilize AI tools to process data from existing systems, and the solution must be completed within a six-month timeframe and a $250,000 budget.

2.2 Project Deliverables

- **Comprehensive Dashboard:** A fully functional, real-time dashboard that tracks sales, customer orders, packaging performance, and delivery metrics.
- **AI-Driven Data Analysis:** AI tools integrated with existing ERP and distribution systems to cleanse and analyze data for the dashboard.
- **Mobile Access:** Secure access to the dashboard on smartphones, tablets, laptops, and desktops.
- **User Training:** A one-week training session on QlikSense AI tools for internal team members.
- **Technical Documentation:** Detailed technical documentation covering the system architecture, data flow, and user guides.
- **Project Documentation:** The project documentation will be provied to the project team and EOC during the crouse of the project, like progress updates and a repository of project knowledge.

2.3 Project Milestones

1. **Project Initiation**: Complete team formation, finalize requirements, and initial project setup (07/31).
2. **AI Tools Training**: Complete one-week training on QlikSense for internal staff (08/31).
3. **System Design**: Finalize dashboard architecture and begin data integration (09/30).
4. **Dashboard Prototype**: Develop an initial dashboard prototype (10/31).
5. **Testing and Validation**: Perform user acceptance testing and refine the dashboard (11/30).
6. **Go-Live**: Full deployment of the dashboard and go-live (12/31).

2.4 Technical Requirements

- Integration with FPD's ERP system and third-party distribution systems.
- Secure data access with encryption and role-based permissions.

- AI-driven data cleansing and visualization via QlikSense.
- 24/7 availability with mobile access.
- Compliance with industry security and data standards.

2.5 Limits and Exclusions

- The project scope does not include developing new AI models beyond those supported by the QlikSense platform.
- External consultant engagement is limited to AI tools training and model validation as required.
- The initial dashboard implementation is focused on domestic operations only. Expanding the system to international operations or other business units is not part of this project.

2.6 Review with Sponsor

The FPD Drinking Metrics (FPD DM) project plan has been reviewed and aligns with the objectives, constraints, and requirements outlined by FPD Beverage Company. By signing below, the sponsor formally approves the project plan and authorizes the project team to proceed to the execution phase.

Approval

Paul Reporting

CFO and Project Sponsor

FPD Beverage Company

Signature: _____

Date: _____

3. Priority Matrix

Illustrates the project constraints (time, cost, and scope/quality) and their relative importance. Importance: Guides decision-making during conflicts, trade-offs, or prioritization, ensuring the project aligns with strategic objectives.

Given the sponsor's emphasis on completing the project within the designated budget and timeline while maintaining high-quality deliverables, the following matrix is established:

Constraint	Enhance	Accept	Constrain
Time			X
Cost		X	
Scope/Quality	X		

Explanation:

- **Time**: The project must be completed within six months. **It is constrained factors**, meaning that time cannot be compromised or expanded without direct approval from the project sponsor and EOC.
- **Cost: Cost is an acceptable variable,** but it must remain within reason. A 10% contingency is included to account for unforeseen expenses. The sponsor has indicated flexibility in engaging third-party vendors if needed to ensure project success while staying within budget limits.
- **Scope/Quality**: The scope of the project, specifically the quality of deliverables such as the dashboard's features and usability, **is marked for enhancement**. The team is expected to maximize the quality and functionality of the dashboard within the given time and cost limits.

4. Work Breakdown Structure & WBS Cost Spreadsheet

Breaks the project into smaller, manageable components, including work packages and tasks, with cost estimates.
Importance: Ensures all project activities are accounted for and provides a foundation for resource allocation, scheduling, and tracking.

4.1 Work Breakdown Structure (WBS) Overview

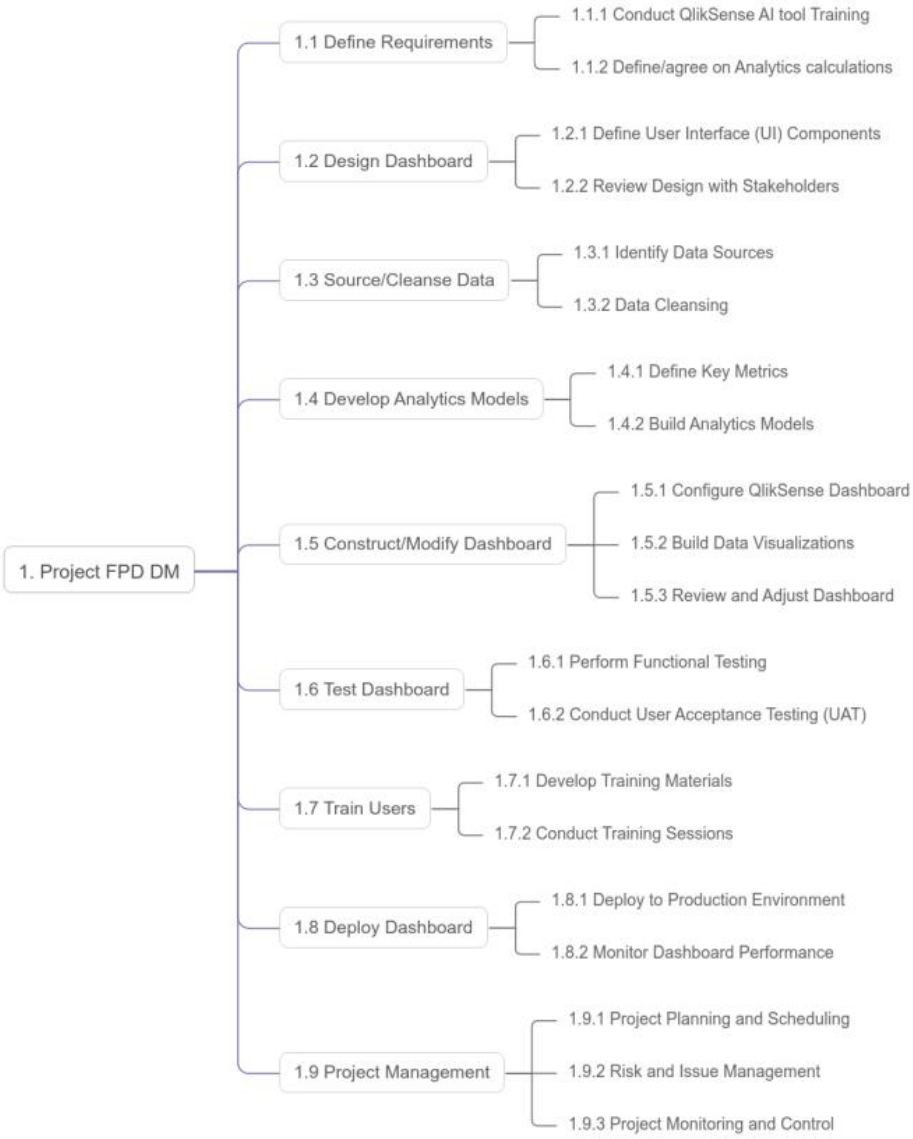
Overall Estimating Method Choice: Hybrid Approach

For the overall WBS, I will use a **hybrid approach** for estimating the times and costs for work packages. The hybrid method combines elements of **top-down** and **bottom-up** estimation, offering flexibility. This is an ideal choice because:

The hybrid approach was chosen because the project has **fixed constraints** (e.g., six-month timeline and $250,000 budget), but it also involves some **technical complexity** (e.g., AI model development, data cleansing). Using a top-down approach initially provides a broad structure for the project.

Explanation of Other Estimation Methods for Selected Work Packages

- **Top-Down Estimation** will be used for the "**Deploy Dashboard"** work package. This work package involves deploying a solution that has already been developed and tested. The task is relatively **straightforward**, and a high-level estimate based on experience with similar deployments can provide a reasonable approximation.
- **Bottom-Up Estimation** will be used for the "**Develop Analytics Models**" work package. This task involves highly specialized work, such as defining metrics, building AI models, and testing their accuracy. Each subtask requires specific resources, tools, and expertise, so a more detailed estimation is necessary.



4.2 WBS Cost Schedule

Time-Cost Labor Estimates

WBS ID	Task Description	Task Assigned to	Estimate (hrs)	Estimating Approach	Estimated Duration (hrs) (Estimate * 1.5)	Estimated Interruption (hrs) (Estimate * 0.33)	Total Effort (hrs)	Labor Rate $/hr	Labor Cost Total $	Expenses	Total Costs	# of Resources	Calendar duration
1.0	Project FPD DM												
1.1	**Define Requirements**											$ 13,278.40	
1.1.1	Conduct QlikSense AI tool Training *(Don't factor the hours - Assume full time training for this only)*	Dean, Jess, Paris	120	Expert			120.0	$20	$ 2,400	$ 10,000	$ 12,400	3	40
1.1.2	Define/agree on Analytics calculations	Charlotte, Lane, Pavia	24	Historical	36.0	7.9	43.9	$20	$ 878	$ -	$ 878	3	14.64
1.2	Design Dashboard				-	-	-		$ -			$ 25,431	
1.2.1	Define User Interface (UI) Components	Ivy, Dan, Dean	120	Expert	180.0	39.6	219.6	$100	$ 21,960	$ 1,000	$ 22,960	3	73.2
1.2.2	Review Design with Stakeholders	Vicki, Ivy	18	Expert	27.0	5.9	32.9	$75	$ 2,471		$ 2,471	2	16.47
1.3	Source/Cleanse data				-	-	-		$ -			$ 16,470	
1.3.1	Identify Data Sources	Dan, Michael	50	Expert	75.0	16.5	91.5	$90	$ 8,235		$ 8,235	2	45.75
1.3.2	Data Cleansing	Dan, Michael	50	Historical	75.0	16.5	91.5	$90	$ 8,235		$ 8,235	2	45.75
1.4	Develop analytics models				-	-	-		$ -			$ 35,136	
1.4.1	Define Key Metrics and KPIs	Vicki, Alex	80	Historical	120.0	26.4	146.4	$75	$ 10,980		$ 10,980	2	73.2
1.4.2	Build Analytics Models and Validate Models	Ivy, Paris, Dean	120	Bottom-up	180.0	39.6	219.6	$110	$ 24,156		$ 24,156	3	73.2
1.5	Construct/Modify dashboard				-	-	-		$ -			$ 61,060	
1.5.1	Configure QlikSense Dashboard	Jess, Paris, Dean	150	PERT	225.0	49.5	274.5	$110	$ 30,195	$ 2,000	$ 32,195	3	91.5
1.5.2	Build Data Visualizations	Ivy, Lane, Dan	100	Historical	150.0	33.0	183.0	$110	$ 20,130	$ 500	$ 20,630	3	61
1.5.3	Review and Adjust Dashboard	Vicki, Ivy	60	Expert	90.0	19.8	109.8	$75	$ 8,235		$ 8,235	2	54.9
1.6	Test dashboard				-	-	-		$ -			$ 22,435	
1.6.1	Perform Functional Testing	Paris, Jess	60	Bottom-up	90.0	19.8	109.8	$90	$ 9,882		$ 9,882	2	54.9
1.6.2	Conduct User Acceptance Testing (UAT)	Charlotte. Pavia	90	Expert	135.0	29.7	164.7	$75	$ 12,353	$ 200	$ 12,553	2	82.35
1.7	Train Users				-	-	-		$ -			$ 11,480	
1.7.1	Develop Training Materials	Alex, Sarah, Michael	40	Expert	60.0	13.2	73.2	$50	$ 3,660	$ 500	$ 4,160	3	24.4
1.7.2	Conduct Training Sessions and Gather Feedback	Vicki, Alex	80	Historical	120.0	26.4	146.4	$50	$ 7,320		$ 7,320	2	73.2
1.8	Deploy Dashboard				-	-	-		$ -			$ 31,476	
1.8.1	Deploy to Production Environment	Ivy, Paris, Dean	120	Top-down	180.0	39.6	219.6	$110	$ 24,156		$ 24,156	3	73.2
1.8.2	Monitor and Provide Post-Deployment Support	Paris, Dean	50	Expert	75.0	16.5	91.5	$80	$ 7,320		$ 7,320	2	45.75
1.9	Project Management *(Put all project management time here - assume full time or half time and don't factor)*				-	-	-		$ -			$ 33,000	
1.9.1	Project Planning and Scheduling	Vicki, Paul	160	Historical			160.0	$75	$ 12,000		$ 12,000	2	80
1.9.2	Risk and Issue Management	Vicki, Paul	100	Historical			100.0	$75	$ 7,500		$ 7,500	2	50
1.9.3	Project Monitoring and Control	Vicki, Paul	180	Historical			180.0	$75	$ 13,500		$ 13,500	2	90
	Total								$ 235,565	$ 14,200	$ 249,765		

5. Communications Plan

Outlines the flow of information, including the target audience, communication frequency, methods, and responsible parties.
Importance: Ensures stakeholders and team members remain informed, engaged, and aligned throughout the project lifecycle.

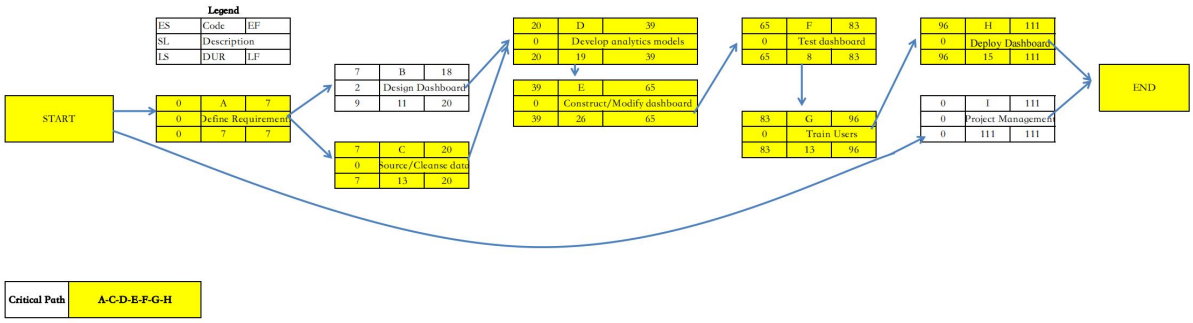
What Information	Target Audience	When?	Method of Communication	Provider
Project progress, budget, risks	Project Sponsor (CFO)	Bi-weekly	Formal reports, Email, Meetings	Project Manager
Milestone reviews, key decisions	Executive Oversight Committee (EOC)	Monthly	In-person presentations, Reports	Project Manager
Task updates, issues, feedback	Project Team Members	Weekly	Team meetings, Email, Slack	Project Manager
Technical updates, integration	IT Department	Weekly	Email, Slack, Technical meetings	IT Manager
Progress on AI tools training, validation	Consultants	As needed	Email, Virtual meetings	Project Manager
User feedback, training updates	End Users (Marketing, Sales)	Monthly	Reports, Training sessions	Supply Chain Analyst & Sales Operations Analyst

6. AON Network Diagram & AON Spreadsheet

A visual representation of task dependencies, durations, and sequencing using Early Start (ES), Late Start (LS), Early Finish (EF), and Late Finish (LF).
Importance: Helps optimize the schedule, identify the critical path, and allocate resources effectively.

Activity/ Work Pkg	Duration (days)	ES	LS	EF	LF	Slack
A	7	0	0	7	7	0
B	11	7	9	18	20	2
C	13	7	7	20	20	0
D	19	20	20	39	39	0
E	26	39	39	65	65	0
F	18	65	65	83	83	0
G	13	83	83	96	96	0
H	15	96	96	111	111	0
Project management	111	0	0	111	111	0

Critical Path	**A-C-D-E-F-G-H**
Critical Path Duration	**111 days**
Critical Path Duration	**15.9 weeks**



7. Project Baseline Budget

Details the planned cost distribution over time.
Importance: Acts as a financial control tool, ensuring the project stays within budget while addressing potential risks.

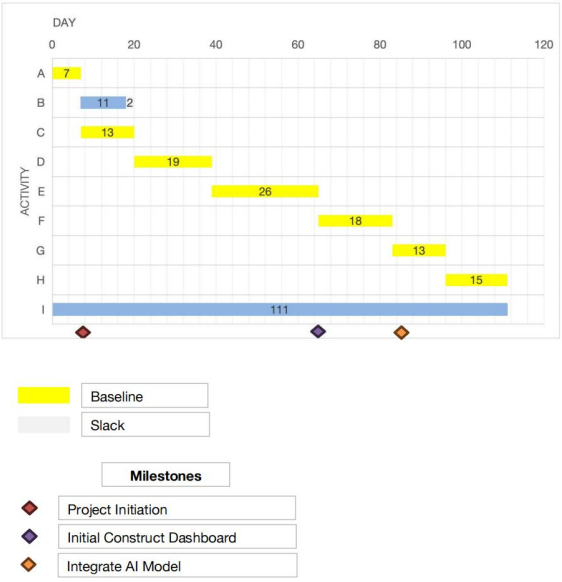
	Schedule information					Baseline budget needs											
						Time Period											
Activity/ Work Pkg	Duration(days)	ES	LF	Slack	Cost Form WBS Cost Spreadsheet	0	10	20	30	40	50	60	70	80	90	100	110
A	7	0	7	0	$13,278	13278.4											
B	11	7	20	2	$25,431		25431										
C	13	7	20	0	$16,470		16470										
D	19	20	39	0	$35,136			17568	17568								
E	26	39	65	0	$61,060					24424	24424	12212					
F	18	65	83	0	$22,435							7478	14957				
G	13	83	96	0	$11,480									7653	3827		
H	15	96	111	0	$31,476										10492	20984	
Project manager	111	0	111	0	$33,000	3000	3000	3000	3000	3000	3000	3000	3000	3000	3000	3000	
				BAC	249766.4	16278.4	44901	20568	20568	27424	27424	22690	17957	10653	17319	23984	
				Culmulative PV		16278.4	61179.4	81747.4	102315.4	129739.4	157163.4	179853.4	197810.4	208463.4	225782.4	249766.4	

Critical Path	A-C-D-E-F-G-H
Critical Path Duration	111 days
Critical Path Duration	15.9 weeks

8. Gantt Chart with milestones

A timeline visualization showing tasks, milestones, durations, and dependencies.
Importance: Provides a clear picture of the project schedule, enabling tracking and adjustments as needed.

ID	Task Name	Start(ES)	Duration	Finish(LF)	slack
A	Define Requirements	0	7	7	0
B	Design Dashboard	7	11	20	2
C	Source/Cleanse data	7	13	20	0
D	Develop Analytics Models	20	19	39	0
E	Initial Construct Dashboard	39	26	65	0
F	Integrate QlikSense AI Model and Modify Dashboard	65	18	83	0
G	Data Security	83	13	96	0
H	Test dashboard	96	15	111	0
I	Train Users and Deployment with monitoring	0	111	111	0



9. Risk Matrices

Includes risk identification, assessment, severity levels, and response strategies.
Importance: Mitigates potential project disruptions by proactively managing high-risk areas.

9.1 Risk Identification

- R1: Receiving unclean data with low data integrity and missing elements.
- R2: Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience.
- R3: Define/socialize/accept performance metrics (how to calculate).
- R4: Experiencing integration issues between ERP and third–party systems.
- R5: Inaccurate AI model predictions.

9.2 Risk Assessment

Risk Assessment Matrix

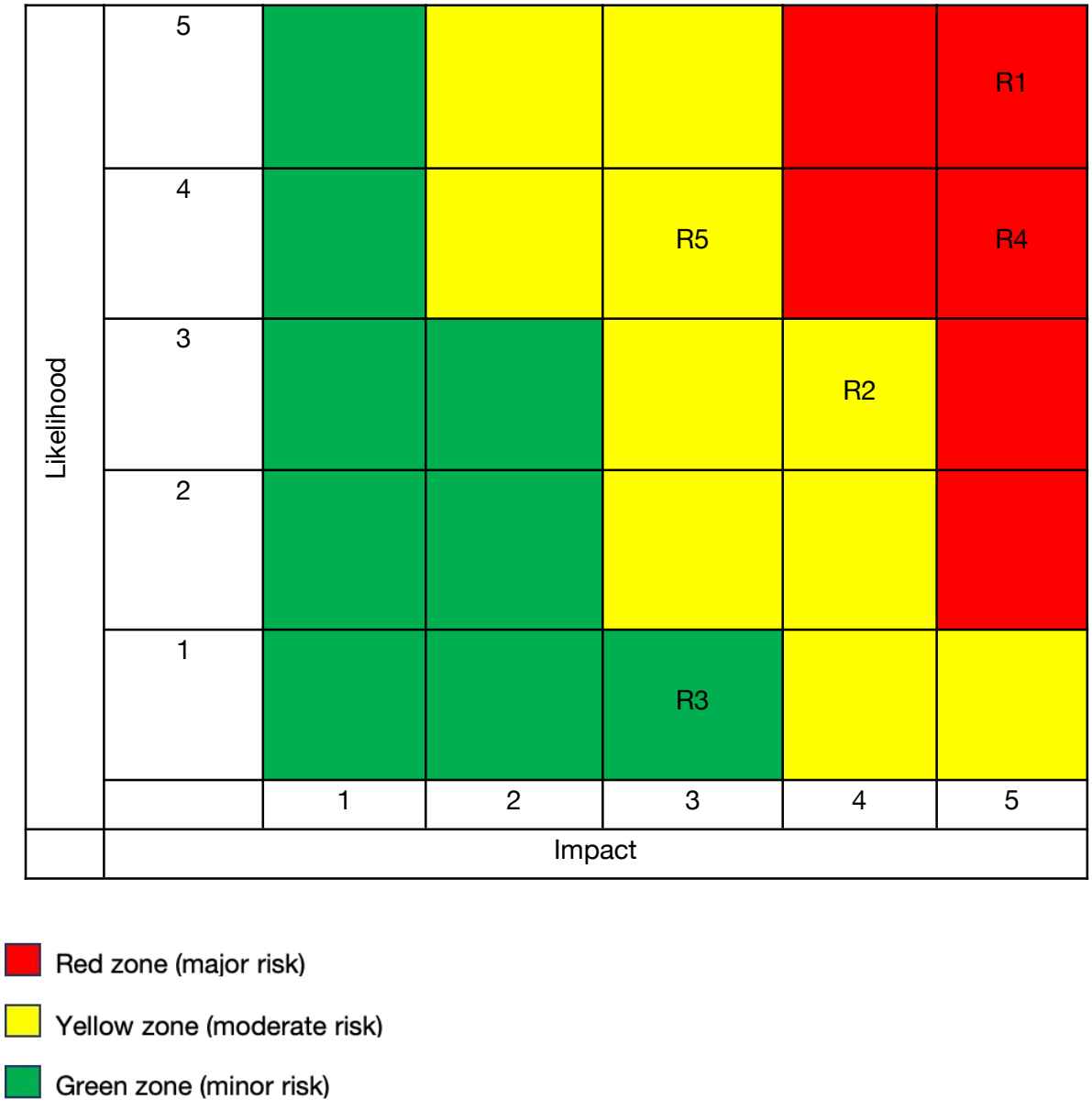
Risk Event	Likelihood	Impact	Detection Difficulty	When
R1: Receiving unclean data with low data integrity and missing elements	5 (Very High)	5 (Very High)	3 (Moderate)	During the data sourcing and cleansing phase, or in the planning phase if we decide to obtain trial data
R2: Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience	3 (Moderate)	4 (High)	2 (Low)	The development of analytics models or the dashboard construction phase as these phases require specialized skills and experience
R3: Define/socialize/accept performance metrics (how to calculate)	1 (Very Low)	3 (Moderate)	2 (Low)	Planning and designing phases
R4: Experiencing integration issues between ERP and third-party systems	4 (High)	5 (Very High)	3 (Moderate)	The system implementation phase, likely as part of the broader data sourcing and cleansing process
R5: Inaccurate AI model predictions	4 (High)	3 (Moderate)	4 (High)	Develop Analytics Models Phase

Likelihood/Impact Legend

Level	Likelihood	Impact	Difficulty
1	Very low	Trivial	Very low
2	Low	Minor	Low
3	Moderate	Moderate	Moderate
4	High	Major	High
5	Very high	Extreme	Very high

9.3 Risk Severity Matrix

The Risk Severity Matrix is shown below, where R1 and R4 are classified as major risks, R2 and R5 are classified as moderate risks, and R3 is classified as a minor risk.



9.4 Risk Response Matrix

Risk Event	Response	Contingency Plan	Trigger	Responsible Party
R1	Mitigate: Initial and regular data quality assessment	Activate a manual data cleaning team and allocate additional resources	Not solved within 48 hours	Tina (Database Analyst)
R2	Mitigate: Provide training for team members on relevant skills Transfer: Outsource tasks to reliable external organizations	Allocate more budget to resource support to prevent project delays	The key progress of the project tasks begins to delay	Benny (Project Manager)
R3	Mitigate: Standard documentation	Adjust metrics based on feedback	EOC and marketing and sales team express confusion on metrics	Charlotte (Analyst)
R4	Mitigate: System integration testing and vendor communication	Establish a working group to address this issue and collaborate with technical experts from the third-party vendor to find a solution	Incompatibility found during integration testing	Tracy (ERP Application Analyst)
R5	Mitigate: Regular model evaluation and retraining	Use alternative algorithms or add manual review step	Model performance drops below threshold	Alan (Analyst)

R1: Receiving unclean data with low data integrity and missing elements.

R2: Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience.

R3: Define/socialize/accept performance metrics (how to calculate).

R4: Experiencing integration issues between ERP and third-party systems.

R5: Inaccurate AI model predictions.

9.5 Risk Accessment Summary

Based on the Risk Assessment Matrix and Risk Severity Matrix, the project's overall risk level is assessed as Medium–High. This assessment considers both the frequency and severity of risks, with a focus on the most impactful areas.

Two risks (R1 and R4) fall in the high–risk (red) category, with very high likelihood and impact levels. These are critical risks that could severely impact project success and require immediate attention.

R5 and R2 lies in the medium–high range (yellow zone), with high likelihood and moderate impact, which also poses a significant challenge to project outcomes. It needs monitoring but poses less immediate threat compared to R1 and R4.

R3 is a low–risk event, with very low likelihood and moderate impact, indicating it has minimal effect on the project's overall risk profile.

With two high–risk events (R1 and R4) and two medium–high risk (R5 and R2), the project is categorized as Medium–High Risk.

The project is assessed as **Medium High Risk** due to the critical nature of R1 and R4, which are both highly likely and highly impactful. The successful completion of the project is dependent on effectively managing these two risks, particularly by implementing data quality measures and ensuring smooth ERP integration. It could substantially impact project performance if not managed carefully, though the project is not in the highest risk category.

9.6 Project Risk Impact Summary

Project Risk Impact Summary

☑ Preliminary ☐ Updated

Project Name: FPD Drinking Metrics (FPD DM)	**Current Date: 06/30/2024**
Project Leader: Vicki Ye	**Service Request #: 1**

Impact	**Risk Rating**	
Capability ==========>	**2.25**	**Medium**
Cost ==========>	**3.50**	**High**
Customer ==========>	**1.62**	**Low**
Technology ==========>	**2.38**	**High**

Definitions

Impact

Capability: The impact on the skills and availability of the company's personnel to manage and complete the project.

Cost: The impact of a project's total estimated cost on the stakeholder's budget

Customer: The impact of the project on the personnel, procedures and systems of the company's business unit(s) and members.

Technology: The impact of a project on the company's Information Technology (hardware, software and standards).

Risk Rating

High Greater than 2.3
Medium: 1.67 through 2.3
Low: Less than 1.67

Project Risk Impact Worksheet

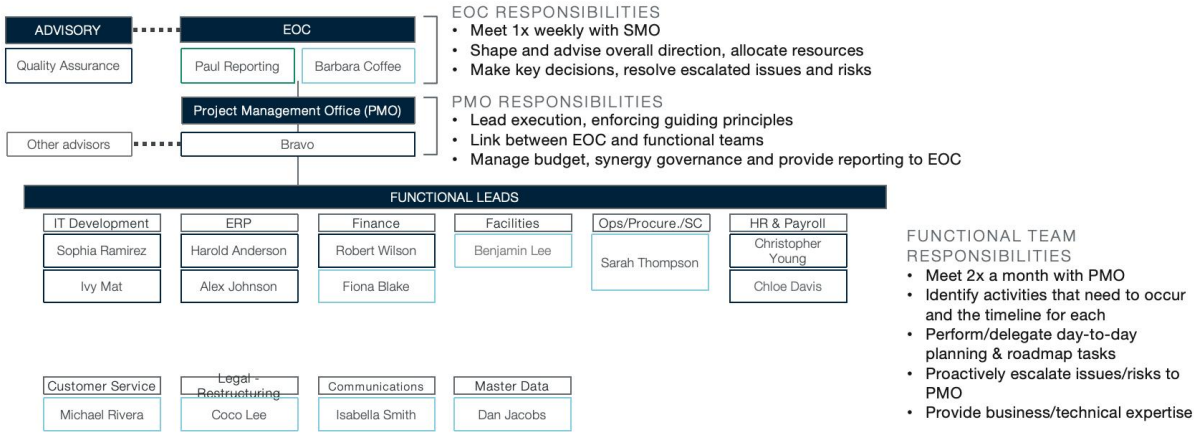
Risk Characteristic	Low Risk = 1	High Risk = 3	Risk Rating	Impact	Weight	Adjusted Rating
Project management processes and procedures are:	Familiar and will be utilized	Not familiar and will not be utilized	1	Cap	0.5	0.5
The application manager has:	Similar experience on other projects	Little experience on similar projects	2.5	Cap	0.5	1.25
The application team is:	Located together	Dispersed at multiple sites	2.75	Cap	0.5	1.375
The vendor or project team is:	Experienced with the solution	Not experienced with the solution	1.5	Cap	1	1.5
Project staffing level is:	Less than 8	More than 8	3	Cap	1	3
The quality of current data is:	Well defined and simple to convert	Poor or complex to convert	2.5	Cap	1	2.5
The project is dependent on:	Zero or one outside project team	Three or more outside teams or people	1	Cap	1.5	1.5
The subject matter is:	Well known by the project team	Not well known by the project team	1.5	Cap	1.5	2.25
The technical (programming) requirements are:	Similar to others in the company	Very vague or very complex	2.75	Cap	1.5	4.125
The total estimated project duration is:	Less than 3 months	Longer than three months	3	Cap	1.5	4.5
If a software package implementation:	No or minimal customization is needed	Heavy customization is needed	2.5	Cost	1	2.5
The total estimated project cost is:	Less than $100,000	More than $100,000	3	Cost	1.5	4.5
If a software package implementation:	The product or release is stable	The product or release is new	3	Cust	0.5	1.5
The business benefit of the project is:	Well defined	Inadequately defined	1.2	Cust	0.5	0.6
The business customer commitment level is:	Involved, easy to engage	Uninvolved, hard to engage	1	Cust	0.5	0.5
The business requirements of the project are:	Understood and straightforward	Not familiar and will not be utilized	1.2	Cust	1	1.2
The project sponsor is:	Identified and committed	Not identified or committed	1	Cust	1	1
The scope of the project is:	Well defined	Inadequately defined	1.5	Cust	1	1.5
Business processes, procedures, policies require:	Little or no change	Substantial change	1.5	Cust	1.5	2.25
Changes to the organizational structure require:	Little or no change	Substantial change	1	Cust	1.5	1.5
The number of departments/organizations this will affect:	One	Three or more	3	Cust	1.5	4.5
The system availability requirements include:	Windows of availability and downtime	Availability on a 24/7 basis	3	Tech	0.5	1.5
Use of contractor or part time staff is:	None	Extensive	1	Tech	0.5	0.5
The data requirements are:	Simple	Complex	2	Tech	1	2
The number of system interfaces are:	One or none	Three or more	2	Tech	1	2
The technology being utilized consists of:	Existing software, hardware, languages, datebases and tools	New software, hardware, languages, datebases or tools (or new releases)	3	Tech	1.5	4.5
The testing requirements are:	Simple	Complex	2.5	Tech	1.5	3.75

1. For checkboxes under the spreadsheet title, check **Preliminary** box for initial use of form. If the form is updated, check **Updated**.
2. Enter **Project Name**, **Project Leader**, **Current Date** and **Service Request #**
3. For each Risk Characteristic in the spreadsheet enter a Risk Rating between 1 and 3 (1is lowest risk, 3 is highest risk).

Checklist modified from original - August 2017

10. Project Organization

A graphical hierarchy showing the relationships among EOC, project manager, stakeholders, and team members, with the organizational structure type (functional).
Importance: Provides clarity on reporting lines, collaboration, and the structure's impact on project execution.



10.1 Type of Structure: Functional

Key Roles in the Chart:

- **Executive Oversight Committee (EOC):** Includes senior management (e.g., CEO, CFO) responsible for strategic decisions and project alignment with organizational goals.
- **Project Management Office (PMO):** Bridges the functional teams and EOC, ensuring proper execution, resource allocation, and alignment with guiding principles.
- **Functional Leads and Teams:** Represents specific functional areas like IT, Finance, Operations, Customer Service, and Communications.

10.2 Reason for Functional Organization

1. **Alignment with Departmental Expertise:** The project heavily relies on specific departments (e.g., IT, Sales, Supply Chain), making it efficient to assign responsibilities within their established roles.
2. **Integration with Normal Operations:** Functional structures allow project tasks to be managed through existing workflows and hierarchies, minimizing disruptions to regular operations.
3. **Top–Down Supervision:** The EOC provides oversight, aligning the project with strategic goals without requiring separate projectized structures.

10.3 Project Management Implications

1. **Specialization and Expertise:** Functional teams consist of specialists in their respective areas (e.g., IT, Finance, Operations). This ensures the project benefits from deep technical expertise and well-established knowledge within each function.
2. **Resource Efficiency:** Functional resources are shared across multiple projects, reducing redundancy. Team members continue contributing to regular departmental activities, ensuring operational stability.
3. **Low Team Commitment to the Project**: Team members are more focused on their departmental responsibilities than the project. The project may take a backseat to other departmental priorities.
4. **Longer Timelines:** Decision-making and approvals may take longer due to the hierarchical structure. Resource availability is subject to functional workload.

11. Feasibility

Explains how project success will be measured, using the deliverables, timeline, and monitoring processes.
Importance: Assures executives of the project's viability and the mechanisms to ensure its successful execution.

The success of the FPD DM project can be determined by evaluating the following key criteria, which are directly linked to the planning, execution, and monitoring processes:

1. **Deliverables Completed On-Time and Within Budget**
2. **Functionality of the Metrics Dashboard:**
   - The cloud-based dashboard will deliver actionable insights on sales, packaging, and delivery performance.
   - The dashboard must be user-friendly, accessible on multiple devices, and secure, meeting the requirements set by stakeholders.
3. **Stakeholder Satisfaction:**
   - Weekly EOC reviews will gauge alignment with expectations.
   - A final review with stakeholders will validate that deliverables meet the intended objectives and business needs.
4. **Data Accuracy and Usability:**
   - AI-driven data models will be validated and tested to ensure high accuracy and reliability.
   - Data sourced from ERP systems and distribution networks must be cleansed and prepared to populate the dashboard seamlessly.
5. **Successful Deployment and Adoption:**
6. **Alignment with Strategic Objectives:**
   - The project supports FPD Beverage Company's need for improved decision-making and operational efficiency.
   - Positive outcomes, such as reduced customer complaints and enhanced delivery performance, will demonstrate strategic success.

Monitoring and Controlling Processes:

- **Weekly Status Reports:** Track progress against the baseline schedule and budget.
- **Risk Monitoring:** Address identified risks promptly to prevent disruptions.
- **EVM Analysis:** Use Planned Value (PV), Earned Value (EV), and Actual Cost (AC) to track performance and forecast project outcomes.
- **Stakeholder Reviews:** Continuous feedback loops to ensure deliverables align with expectations.

12. Responsibility matrix

Assigns roles and responsibilities (Responsible, Accountable, Consulted, Informed) for each task. Importance: Clarifies accountability, reduces ambiguity, and ensures all tasks are owned.

Task	Project Manager	IT Manager	ERP Analyst	Database Analyst	Supply Chain Analyst	Sales Analyst
1.1 Define Requirements	R	S	S	S	S	R
1.2 Design Dashboard	R	S	S	S	S	R
1.3 Source/Cleanse Data	R	S	R	R	S	S
1.4 Develop Analytics Models	R	S	S	R	S	S
1.5 Construct/Modify Dashboard	R	S	S	S	S	R
1.6 Test Dashboard	R	S	S	S	S	R
1.7 Train Users	R	S	S	S	S	R
1.8 Deploy Dashboard	R	S	S	S	S	S
1.9 Project Management	R	S	S	S	S	S

Legend

R (Responsible): The person/team primarily responsible for completing the task.

S (Support/Assist): Provides support or assistance as needed.

Project Plan
Student Self Assessment

Name: Vicki Ye

Project Plan Componen	Points	Not Done	Some Elements	Some Elements of Competency	Done with some Major Flaws	Mostly done with Min Flaws	Completely Present	Score
Executive Summary	90	0	18	30	48	66	90	90
Project Scope Statement	60	0	12	24	36	48	60	60
Priority Matrix	30	0	6	12	18	24	30	30
Work Breakdown Structure & WBS Cost Spreadsheet	60	0	12	24	36	48	60	60
Communications Plan	30	0	6	12	18	24	30	30
AON Network Diagram & AON Spreadsheet	60	0	12	24	36	48	60	60
Project Baseline Budget	60	0	12	24	36	48	60	60
Gantt Chart w 3-4 milest	60	0	12	24	36	48	60	60
Risk Assmt, Severity, & Response Matrices; FPD Project Risk Impact Summary	30	0	6	12	18	24	30	30
Project Organization	30	0	6	12	18	24	30	30
Feasibility	30	0	6	12	18	24	30	30
Integration	60						60	60

Scope ties with WBS
Comm Plan identifies key stakeholders
WBS ties to Gantt Chart
WBS ties to Project Baseline Budget
AON Diagram consistent w/ Gantt Chart
Risk identification ties to WBS

Extra Credit: enhances story								
Responsibility matrix	30	0	6	12	18	24	30	30

Other	0	0	6	12	18	24	30	

Project Plan Total	600		630
25% Course Grade - 600	points	Points Earned	3780