



PROJECT PLAN (GROUP)

Student Name
Student ID



Contents

1.0 Introduction	4
2.0 Project Objectives	5
3.0 Scope Statement	5
3.1 Project Background.....	6
3.2 Scope Description	6
3.3 Problem Statement.....	7
3.4 Project Objectives.....	7
3.5 Project Requirements.....	7
3.6 Project Deliverables and Acceptance criteria.....	8
3.7 Milestones.....	9
3.8 Project Constraints.....	9
3.9 Project Assumptions	10
3.10 Project Exdusions	10
4.0 Work Breakdown Structure (WBS).....	12
5.0 Stakeholder Management Plan	14
5.1 Stakeholder Register.....	15
5.2 Stakeholder Management Strategy.....	22
5.3 Stakeholder Analysis Matrix.....	21
6.0 Human Resources Management Plan.....	0
6.1 Project Organizational Chart.....	1
6.2 RACI Matrix.....	0
6.3 Resource Histogram.....	2
7.0 Schedule Baseline	3
7.1 Gantt Chart.....	3
7.2 Network Diagram	4

7.3 Critical Path Analysis.....	5
7.4 Critical Chain Analysis	6
8.0 Risk Management Plan.....	7
8.1 SWOT Analysis.....	8
8.2 PESTLE Analysis.....	9
8.3 Risk Matrix.....	12
8.4 Assigning the Risk	12
8.5 Risk Register.....	12
9.0 Cost Management Plan.....	15
9.1 Bottom-Up Budget.....	15
9.2 Cost Baseline	16
9.3 Cumulative Expenditure Curve.....	19
10.0 Procurement Plan	20
10.1 Procurement Process.....	21
11.0 Communication Plan.....	24
11.1 Communication Register.....	25
12.0 Conclusion	27
References.....	28

List of Figures

Figure 1: WBS Chart	13
Figure 2: Stakeholder Management Matrix	22
Figure 3: Organizational chart	2
Figure 4: Resource Histogram.....	2
Figure 5: Gantt Chart	4

Figure 6: Network diagram.....	5
Figure 7: Critical Path Analysis	7
Figure 8: Cost S-Curve.....	19

List of Tables

Table 1: Project Information	6
Table 2: Project Deliverables	8
Table 3: Project Milestones.....	9
Table 4: Project Stakeholder Register.....	20
Table 5: Project Stakeholder Management Strategy.....	23
Table 6: Human Resources Management Plan	0
Table 7: RACI Matrix.....	0
Table 8: Comparison of CPA and CCA.....	7
Table 9: Risk Register	13
Table 10: Cost Baseline.....	16
Table 11: Proposal Evaluation Score	22
Table 12: Proposal Evaluation Table	22

1.0 Introduction

Competent project management is crucial in today's ever-changing corporate world. This study explores CIT Services' complex project development and execution processes. The study explores the challenges of project management in a dynamic, forward-thinking firm via several key parts, tools, and methods.

The research begins by carefully examining the Project Proposal's goals, scope, stakeholder analyses, and financial reasons. The strong project proposal guides the project's path toward its organization's strategic goals. The study then discusses Project Objectives, highlighting the need for clear, quantifiable, realistic, appropriate, and time-limited objectives. SMART goals set project boundaries and ensure success. Many techniques and instruments are revealed throughout study. Structured execution relies on the horizontal work breakdown structure, or WBS, of project activities. The importance of risk registrations including emergency planning for developing resilience against unexpected obstacles is also examined in Risk Management techniques.

The study focuses on handling costs, including budget estimates, baselines, and spending monitoring. Competent financial administration optimizes resource allocation, reducing budget overruns increasing the sustainability of projects. The research emphasizes the need of stakeholder management, including thorough stakeholder analysis, straightforward liaison tactics, and engagement programs. Positive connections ensure satisfaction for stakeholders and accomplishment of the project.

The study examines the efficacy of Implementing Tools like Gantt Charts for depicting project timetables and essential path evaluation for identifying essential project sequences. Communications Plans including Strategies emphasize open communication between project team members & external stakeholders. The study examines proposal evaluation, calling for objective evaluations based on pricing, technological progress, compliance, prior performance, quality of service, recourse accessibility, and references. This study guides project execution & organizational success with insights and techniques that apply to all project management contexts.

2.0 Project Objectives

The project's goals are crucial in uniting the project's crew and its constituents around a shared goal. They aid in directing efforts, managing resources wisely, and keeping the endeavour on track by providing clear, explicit, and quantifiable goals. The achievement of a task can be measured against clearly articulated goals, therefore the team may use those goals as a basis for making choices at every stage of the endeavour. They provide the groundwork for the project management processes of planning, carrying out, monitoring, and controlling.

- **Generate & Assess Concepts:** Create and Evaluate Concepts Identify project concepts via systematic brainstorming, keeping in mind the need of meeting both client and company objectives.
- **Protect Project Claim:** Perform market study as well as analysis of finances to back up the need for the project and prove its worth.
- **Progress Detailed Scheme Plan:** Establish a thorough strategy defining the project's goals, scope, deliverables, including milestones for each phase.
- **Scope Organization:** Manage the scope of the project by creating a precise Work Breakdown Structure (WBS) and a short scoping management Plan.
- **Participate Stakeholders:** Create a Stakeholder Monitoring Plan to help you find, evaluate, and include the people who matter most in the success of your project.

3.0 Scope Statement

The business's approach to interacting with customers will be revamped thanks to the Installation of an Integral CRM (Customer Relationship Management) System project. The goal is to implement a company-wide CRM solution that will streamline operations and centralize customer information across all teams. The solution will streamline marketing campaigns, improve customer service, and boost productivity. Lead administration, opportunity monitoring, customer service, and in-depth analytics are all part of the package.

Adapting the CRM features to our unique needs necessitates extensive customisation, which is what this project is all about. In addition, strict data security procedures are required to guarantee compliance with applicable privacy laws and industry requirements. Training programs for all staff members are included to guarantee the best possible system use. The project also provides a simple connection with preexisting software programs, which should help departments work together better.

Major changes made after implementation that were not a part of the original blueprint are beyond the scope of this project. Also, not included are any future hardware updates beyond what is already in place. The project's boundaries are set by the specified features and capabilities required for successful management of client relationships.

Our company's income and competitiveness will rise as a result of the implementation of this CRM system, which will provide a consolidated picture of customer information, streamline business processes, and boost customer happiness.

3.1 Project Background

Background details of newly implementing project management system to CIT Services.

Table 1: Project Information

PROJECT ID	PJCT2021
PROJECT TITLE	Implementation of an Integrated Customer Relationship Management (CRM) System at CIT Services
PROJECT OWNER	
PROJECT SPONSER	
PROJECT MANAGER	
DATE OF PROJECT APPROVAL	

3.2 Scope Description

CIT Services has embarked on a strategic drive to implement a unified (CCM) system in an effort to radically alter how we interact with our clientele. The scope of this project is implementing a state-of-the-art customer relationship management system created specifically for CIT Solutions. Sales automated processes, customer service, marketing analytics, along with data management plugins must all be included. As a result of the system's efforts, the company's sales, marketing, other customer support departments will be able to see comprehensive customer profiles.

Important to this goal is adapting the CRM program to fit the specific needs of CIT Services' operations. The process includes setting up the software to automate sales processes, which in turn facilitates accurate lead tracking, opportunity management, and a complete record of all interactions with customers. The CRM solution will help streamline collaboration amongst

teams to provide consistent service to customers. Employees may take use of the offered training packages to make the switch as painless as possible and get the most out of the system.

The project's scope, however, does not extend to making significant changes after installation or installing new hardware. It also excludes changes to business processes that are unrelated to the ones being revised. Customers' needs will be better met, operations will run more smoothly, and employees will have access to actionable data thanks to CIT Services' new customer relationship management system.

3.3 Problem Statement

Disparate client information creates challenges for CIT Services' operations and communication. When a company's sales, marketing, and support departments aren't all connected, productivity suffers. Productivity and customer happiness both suffer as a result of this dispersion. In order to simplify operations, improve teamwork, and provide outstanding customer service, it is essential to use an integrated customer relationship management system.

3.4 Project Objectives

- To generate project ideas via organized brainstorming that are in line with client requirements and company objectives.
- Undertake market studies and financial evaluations to establish the viability and interest in the idea.
- Develop an all-encompassing strategy detailing the project's goals, scope, deliverables, including milestones.
- Create a comprehensive Work Breakdown Structure (WBS) and scope-management Plan (SMP) to define each individual responsibility.
- That Identify, Analyze, and Effectively Integrate Stakeholders in the Project by Creating a Stakeholder Managing Plan.

3.5 Project Requirements

Functional Requirements:

- **Customer Information Integration:** Integrate data about your customers from several databases into your customer relationship management software.
- **Sales Computerization:** Sales automation may help you optimize your operations by automating tasks like lead management, potential monitoring, including forecasting of sales.

- **Customer Provision Tools:** Client support Tools provide for rapid access to client data, allowing for effective question response by customer support agents.
- **Advertising Analytics:** In order to conduct focused marketing efforts and discover upselling possibilities, it is necessary to examine customer data using analytical instruments.

Non-Functional Requirements:

- **Data Safety:** Protect sensitive consumer data and act in accordance with data privacy laws by implementing strong data security procedures.
- **System Presentation:** Optimize responsiveness of the system even under heavy load for a consistent user experience.
- **Scalability:** Third, make sure the CRM can scale up to accommodate more users and more data as your company grows.
- **User Exercise:** Create in-depth training sessions to help users easily embrace the system and get the most out of it.

3.6 Project Deliverables and Acceptance criteria

Table 2: Project Deliverables

Project Deliverables	Description	Acceptance Criteria
Integrated CRM System	Implementation of fully customized CRM software tailored for CIT Services.	All specified functionalities (sales automation, customer support, marketing analytics) operate without errors.
Employee Training Programs	Comprehensive training modules for employees, ensuring proficient system usage.	Employees demonstrate proficiency in system usage during user acceptance testing (UAT).
Documentation Package	Detailed user manuals and system guidelines for reference and training purposes.	Documentation is comprehensive, clear, and easy to understand, aiding users in system navigation and understanding.
Integration with Existing Software	Seamless integration with organizational applications,	Data synchronization and collaborative work with existing applications are

	promoting enhanced collaboration and data accuracy.	smooth, ensuring seamless operations across systems.
Data Security Implementation	Robust data security measures and regulatory compliance ensuring the safety of customer information.	System adheres to data security protocols and complies with relevant regulations, safeguarding customer data from unauthorized access or breaches.

3.7 Milestones

Table 3: Project Milestones

Milestone 1	Project Initiation
Milestone 2	Planning Phase
Milestone 3	System Analysis and Customization
Milestone 4	Implementation and Integration
Milestone 5	Data Security and Compliance
Milestone 6	Pilot Testing and Feedback
Milestone 7	Full Deployment
Milestone 8	Evaluation and Optimization
Milestone 9	Project Closure

3.8 Project Constraints

It is important to mention that the limitation of the project and the risk factors in the scope statement. Team members of the project should aware what is inside the scope and outside as well as the boundaries in order to achieve ultimate success of the project. Project managers and responsible parties should monitor and control to achieve successful outcomes until the end of the project.

Project Constraints are:

- The project's financial situation is tight; therefore, it must make do with the available resources in the most efficient way possible.

- The project must be finished by a certain date. Other projects or market openings within the firm may be impacted by the delay.
- There may be delays and quality issues with the project due to a lack of available professional workers and specialized knowledge.
- The project has to fit into the already-in-place technical framework, which may restrict certain features or integrations.
- Some functionality or data-handling procedures may be limited to ensure compliance with industry rules as well as information protection legislation.

3.9 Project Assumptions

During each stage of a project's lifetime, it's important to investigate and comprehend the assumptions that will underpin the work. Assumption assessment and risk administration planning rely heavily on the notion that every assumption has an associated risk component. The project manager has a heavy burden in communicating the project's expectations to the team. Planning-stage project expectations should be analysed, documented, and communicated by the project management.

Project Assumptions are:

- Expectation that all essential input, comments, and approvals from stakeholders would be provided on schedule and on full.
- The availability of all labor, equipment, and supplies necessary to complete the work on time is assumed.
- The delivery of goods and amenities on schedule and as promised by external suppliers and partners is assumed.
- Assuming the information being integrated into the CCM system is correct, full, and readily accessible.
- Provided end-users have received enough training and preparation for acceptance of the system, this will lead to efficient use immediately after deployment.

3.10 Project Exclusions

The criteria for what is not included in the overall endeavor are outlined in the proposal's exclusion requirements. Major changes made after implementation that differ significantly from the original plan are not covered. Furthermore, updates that need significant hardware changes beyond the constraints of the current infrastructure are not included. Modifying or

replacing unrelated business processes is also outside the scope of this project. Any changes that aren't directly related to the existing CCM system and don't improve the core features cannot be included in the scope of work. The CCM deployment may thus proceed efficiently and in line with the business's goals thanks to these exclusions preventing range creep.

- It's possible that not every division has sufficient manpower.
- The project might suffer if the criteria are altered in any way.
- Task completion may result in a switch in delaines.
- Some requirements may have prohibitively high implementation costs.



4.0 Work Breakdown Structure (WBS)

The Work Breakdown Structure (WBS) is a method for breaking down an enormous task through smaller, easier to manage sections of labour. It's a visual aid that helps in the management, planning, and tracking of projects by providing a comprehensive picture of their scope. The Work Breakdown Structure (WBS) dissects the job into manageable chunks. Some benefits of WBS include the following-

- Provides a transparent definition of the project's scope that all parties can agree on.
- Allows for more accurate and thorough work scheduling, allocation of resources, and overall planning.
- Improves communication between groups and eliminates misconceptions via the use of images.
- Establishes accountability and duty of care by assigning specified duties to team members.
- Makes it simple to track development, which helps pinpoint bottlenecks and make necessary modifications on the fly.
- Sets limits on the project so that it doesn't get out of hand and loses sight of its goals.
- Supports early detection of threats and the development of countermeasures.

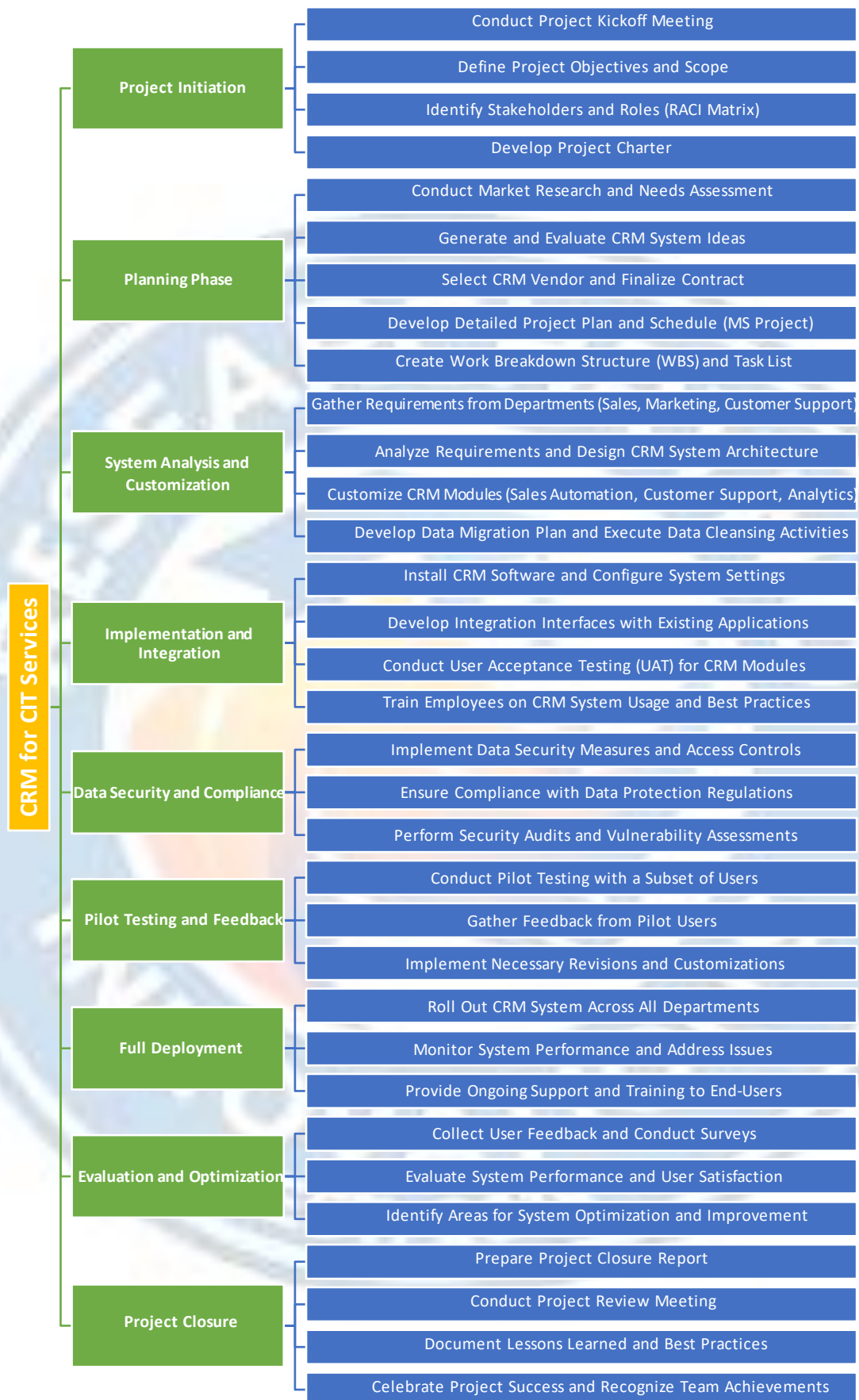


Figure 1: WBS Chart

5.0 Stakeholder Management Plan

Stakeholders in the project are defined, communicated with, and managed according to a project-specific Stakeholder Management Strategy. It lays out who the major players are, what they do, what they want, and how to get them involved and communicate with one another. The strategy guarantees that all stakeholders' needs are met, their input is valued, that the project is successful.

Internal Stakeholders

- Project Sponsor
- Project Manager
- Assistant Project Manager
- Project Coordinator
- Technical members
- Other Team Members
- IT support
- Operational Manager
- QA manager
- Change Control Board
- Test Analyst
- Developer
- Subject Matter Experts

External Stakeholders

- Suppliers
- Government Regulators
- Contractors
- Trade Unions
- Vendors
- None-Profit-Organizations

5.2 Stakeholder Register

Stakeholders are those who will be impacted by the project in some way, either directly or through indirect means. They are crucial to the success of the project since they either contribute to it, are affected by it, or have some say in the choices being made. Stakeholders need to be identified, analysed, and involved in the project at all stages for successful stakeholder handling. Their comments and suggestions are essential for achieving project success and satisfying stakeholders. Relationship development, conflict mitigation, and gaining buy-in from key stakeholders are all facilitated by open lines of communication & a thorough grasp of their needs & interests.



Project Title: Implementation of an Integrated Customer Relationship Management (CRM) System at CIT Services

Date prepared: 10th of July 2021

Project Manager: Student Name

Last updated: 13th August 2021

Table 4: Project Stakeholder Register

Position	Name	Company	Contact	Role	Requirement	Expectation	Influence/ Interest	Power/ Impact
Internal Stakeholders								
Project Sponsor	John Smith	CIT Services	123-456-7890	Strategic Decision-Maker	Financial Support	Project Success and ROI	High	High
Project Manager	Sarah Brown	CIT Services	234-567-8901	Project Leader	Project Planning and Execution	Timely Completion and Quality Work	High	High
Assistant Project Manager	Alex Johnson	CIT Services	345-678-9012	Project Coordinator	Coordination and Monitoring	Team Efficiency and Task Completion	Medium	Medium
Project Coordinator	Emily White	CIT Services	456-789-0123	Team Organizer	Task Coordination and Support	Smooth Workflow and Collaboration	Medium	Medium
Technical Members	Michael Lee	CIT Services	567-890-1234	Technical Experts	Technical Expertise and Support	Effective Solutions and Implementation	High	High

Other Team Members	Laura Davis	CIT Services	678-901-2345	Team Contributors	Task Execution and Collaboration	Teamwork and Task Completion	Medium	Medium
IT Support	Chris Wilson	CIT Services	789-012-3456	IT Support Specialist	Technical Assistance and Support	Smooth IT Operations and Issue Resolution	Medium	Medium
Operational Manager	Mark Johnson	CIT Services	890-123-4567	Operational Leader	Resource Allocation and Operations	Efficient Operations and Resource Usage	High	High
QA Manager	Lisa Parker	CIT Services	901-234-5678	QA and Testing Leader	Quality Assurance Standards	Bug-free Software and Reliable Systems	High	High
Change Control Board	Eric Adams	CIT Services	012-345-6789	Change Management Expert	Change Approval and Monitoring	Smooth Transition and Minimal Disruptions	High	High
Test Analyst	Olivia Moore	CIT Services	123-456-7890	Testing Specialist	Test Planning and Execution	Reliable Test Results and Bug Identification	Medium	Medium
Developer	Ryan Clark	CIT Services	234-567-8901	Software Developer	Coding and System Development	Efficient Coding and Implementation	High	High
Subject Matter Experts	Alex Turner	CIT Services	345-678-9012	Domain Experts	Expert Knowledge and Consultation	Accurate Information and Domain Insight	High	High
External Stakeholders								

Suppliers	Daniel White	XYZ Suppliers Inc.	456-789-0123	Supplier Representative	Timely Deliveries and Quality Products	Reliable Supplies and Timely Deliveries	High	High
Government Regulators	Sarah Johnson	Government Agency	567-890-1234	Regulatory Officer	Compliance with Regulations	Adherence to Regulations and Documentation	High	High
Contractors	Kevin Davis	XYZ Contractors Inc.	678-901-2345	Contracted Worker	Contractual Compliance and Execution	Completion of Contractual Obligations	Medium	Medium
Trade Unions	Mia Roberts	Trade Union Alliance	789-012-3456	Union Representative	Worker Rights and Benefits	Fair Treatment and Worker Advocacy	High	High
Vendors	Owen Miller	XYZ Vendor Solutions	890-123-4567	Vendor Representative	Product/Service Delivery and Support	Quality Deliverables and Timely Support	Medium	Medium
Non-Profit Organizations	Laura Adams	Community Non-Profit	901-234-5678	Non-Profit Representative	Collaboration and Contribution	Positive Social Impact and Collaboration	High	High

5.3 Stakeholder Management Strategy

Table 5: Project Stakeholder Management Strategy

Name	Role	Strategies	Priorities	Influence/Interest	Power/Impact
John Smith	Project Sponsor	Engagement: Regular briefings on project progress. Address Concerns: Promptly address financial queries.	Timely Updates and Financial Transparency	High	High
Sarah Brown	Project Manager	Communication: Clear project objectives and task assignments. Feedback: Regular feedback sessions.	Task Completion and Quality Work	High	High
Alex Johnson	Asst. Project Manager	Collaboration: Coordinate tasks and streamline team efforts. Support: Offer assistance as needed.	Team Efficiency and Task Completion	Medium	Medium
Emily White	Project Coordinator	Coordination: Efficient task allocation and progress tracking. Team Support: Provide resources.	Smooth Workflow and Collaboration	Medium	Medium
Michael Lee	Technical Member	Technical Expertise: Provide guidance and share knowledge. Problem-Solving: Address technical issues.	Effective Solutions and Implementation	High	High

Laura Davis	Team Member	Task Execution: Complete assigned tasks on schedule. Collaboration: Work well within the team.	Teamwork and Task Completion	Medium	Medium
Chris Wilson	IT Support Specialist	Technical Support: Address IT issues promptly. Training: Provide necessary technical training.	Smooth IT Operations and Issue Resolution	Medium	Medium
Mark Johnson	Operational Manager	Resource Allocation: Allocate resources efficiently. Operations: Ensure smooth day-to-day operations.	Efficient Operations and Resource Usage	High	High
Lisa Parker	QA Manager	Quality Assurance: Uphold QA standards rigorously. Feedback: Address QA concerns promptly.	Bug-free Software and Reliable Systems	High	High
Eric Adams	Change Management Expert	Change Approval: Efficiently handle change requests. Communication: Transparent change notifications.	Smooth Transition and Minimal Disruptions	High	High
Olivia Moore	Test Analyst	Testing Excellence: Conduct thorough testing. Bugs: Report and rectify bugs promptly.	Reliable Test Results and Bug Identification	Medium	Medium

Ryan Clark	Developer	Efficient Coding: Code efficiently and debug meticulously. Collaboration: Coordinate with other teams.	Efficient Coding and Implementation	High	High
Alex Turner	Subject Matter Expert	Expert Consultation: Offer valuable domain insights. Collaboration: Collaborate on domain-specific tasks.	Accurate Information and Domain Insight	High	High
Daniel White	Supplier Representative	Timely Deliveries: Ensure products arrive on time. Quality Products: Maintain high product standards.	Reliable Supplies and Timely Deliveries	High	High
Sarah Johnson	Regulatory Officer	Compliance: Ensure project adheres to regulatory guidelines. Documentation: Maintain comprehensive records.	Adherence to Regulations and Documentation	High	High
Kevin Davis	Contracted Worker	Contract Compliance: Fulfill contractual obligations. Communication: Address concerns proactively.	Completion of Contractual Obligations	Medium	Medium
Mia Roberts	Union Representative	Worker Advocacy: Advocate for workers' rights and benefits. Communication: Maintain open dialogue.	Fair Treatment and Worker Advocacy	High	High

Owen Miller	Vendor Representative	Product/Service Delivery: Ensure timely and quality service delivery. Support: Provide assistance when needed.	Quality Deliverables and Timely Support	Medium	Medium
Laura Adams	Non-Profit Representative	Collaboration: Collaborate effectively on joint initiatives. Impact: Focus on positive social impact.	Positive Social Impact and Collaboration	High	High



5.4 Stakeholder Analysis Matrix

When managing a project, it might be helpful to create the Stakeholder Evaluation Matrix in order to categorize and rank stakeholders according to their degree of interest or impact. Project managers may use this matrix to better communicate with stakeholders, involve them in the process, and manage their relationships with them by better understanding their needs, concerns, & aspirations.

- Strong power, moderate interest;
- Minimal power, great interest;
- Moderate power, moderate interest;
- Minimal power, high strength.

Managers of projects may better communicate with stakeholders, solve their problems, and forge lasting partnerships by using this framework.

This preventative method boosts stakeholder happiness, reduces danger, and helps the project succeed.

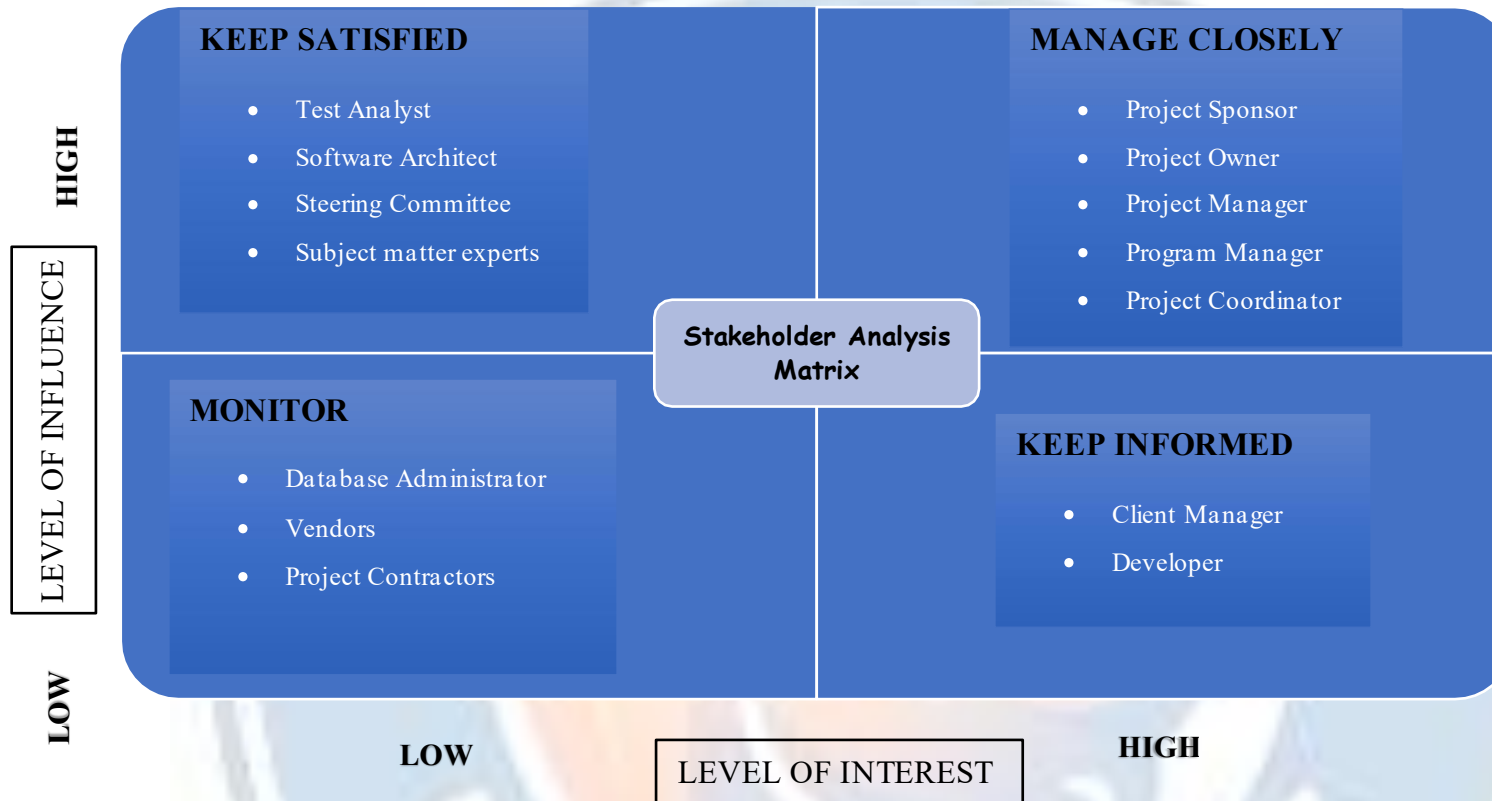


Figure 2: Stakeholder Management Matrix

6.0 Human Resources Management Plan

Human Resources Management Plan

Roles and Responsibilities:

- **Assistant Project Manager:** Assists PM, liaises with team members.
- **IT Support:** Provides technical assistance, resolves IT issues.
- **Project Coordinator:** Organizes tasks, schedules, and supports collaboration.
- **Project Manager:** Overall project supervision and team coordination.
- **Team Members:** Contribute to assigned tasks and team efforts.
- **Technical Members:** Provide technical expertise for CRM implementation.

Table 6: Human Resources Management Plan

Recruitment and Onboarding:	• Recruitment: Fill skill gaps as needed. • Onboarding: Comprehensive orientation and CRM system training.
Training and Skill Development:	• Training Needs Analysis: Identify and address skill gaps. • External Training: Encourage attendance at relevant workshops. • Cross-Training: Foster cross-functional skills among team members.
Team Building and Motivation:	• Team Building Activities: Enhance collaboration and communication. • Recognition and Rewards: Acknowledge outstanding performance. • Regular Feedback: Conduct feedback sessions for open communication.
Communication and Collaboration:	• Clear Channels: Establish regular team meetings and centralized communication. • Collaboration Tools: Use efficient platforms for task tracking and communication.
Conflict Resolution:	• Conflict Management: Address conflicts promptly through open communication. • Escalation Process: Involve higher management if conflicts remain unresolved.

Performance Evaluation:	• Performance Metrics: Define KPIs and conduct regular evaluations. • Improvement Plans: Develop plans for underperforming members, offer support and training.
Compliance and Legal Considerations:	• Regulatory Adherence: Ensure compliance with labor laws and data protection regulations. • Ethical Standards: Uphold ethical norms and create an inclusive work environment.

6.1 Project Organizational Chart

The Client Relationship Management System Integration Project at CIT Services is represented graphically in the Project's Administrative Chart, which details the organization of the undertaking's team includes the reporting connections between members. With this chart as a guide, everyone on the team will know their place along with who they must report to at all times, leading to better communication and more productivity.



Figure 3: Organizational chart

6.2 RACI Matrix

RACI Matrix for CRM System Implementation Project at CIT Services

The RACI matrix gets a useful tool for outlining who is responsible for what inside a project. accountable, Responsible Consulted, & Informed is an abbreviation for these four terms. In the framework of CIT Technologies' CCM System Integration Project, the following roles have been established:

- **Responsible (R):** Those really working to get the job done. The "doers" were the ones who really get things done.
- **Accountable (A):** The person or group ultimately responsible for ensuring the job or deliverable is completed accurately and completely. This individual assigns tasks to the appropriate parties (R).
- **Consulted (C):** Individuals whose input is sought, often experts in their field, along with whom dialogue takes place.
- **Informed (I):** Participants who don't participate actively in the activity but are kept abreast of developments, choices, and results are classified as "informed" (I).

RACI Matrix for CRM System Implementation Project:

Table 7: RACI Matrix

Task/Activity	Project Manager	Assistant PM	Technical Members	Project Coordinator	IT Support	Operational Manager	QA Manager	Other Team Members
Develop Project Plan	A	R	C	I	C	C	C	I
Allocate Resources	A	R	I	I	C	R	I	I

Customize CRM System	R	A	R	I	C	I	C	I
Coordinate Meetings	R	A	I	R	I	I	I	I
Test CRM Functionality	R	C	R	I	I	I	A	I
Resolve Technical Issues	R	I	A	I	R	I	C	I
Report Project Progress	R	I	I	C	I	R	I	I

In this RACI matrix, roles and responsibilities for various tasks related to the CRM System Implementation Project are clearly defined, ensuring efficient workflow and accountability across the project team.

6.3 Resource Histogram

Team members who manage projects rely heavily on the Capacity Histograms, which is visually used for sharing information with all parties involved in the project. To be more exact, a resource distribution is a graphic representation of the undertaking's resource allocation across time. In order to better understand what materials are available, which of them should be used at the moment, for what duration, etc., this is a useful tool for managers of projects and teams of project management leadership. Among the most important parts of managing a project is allocating resources to the many people who will be working on it. The information provided by the Resources Histogram facilitates informed management decisions and efficient project execution throughout the life of the undertaking.

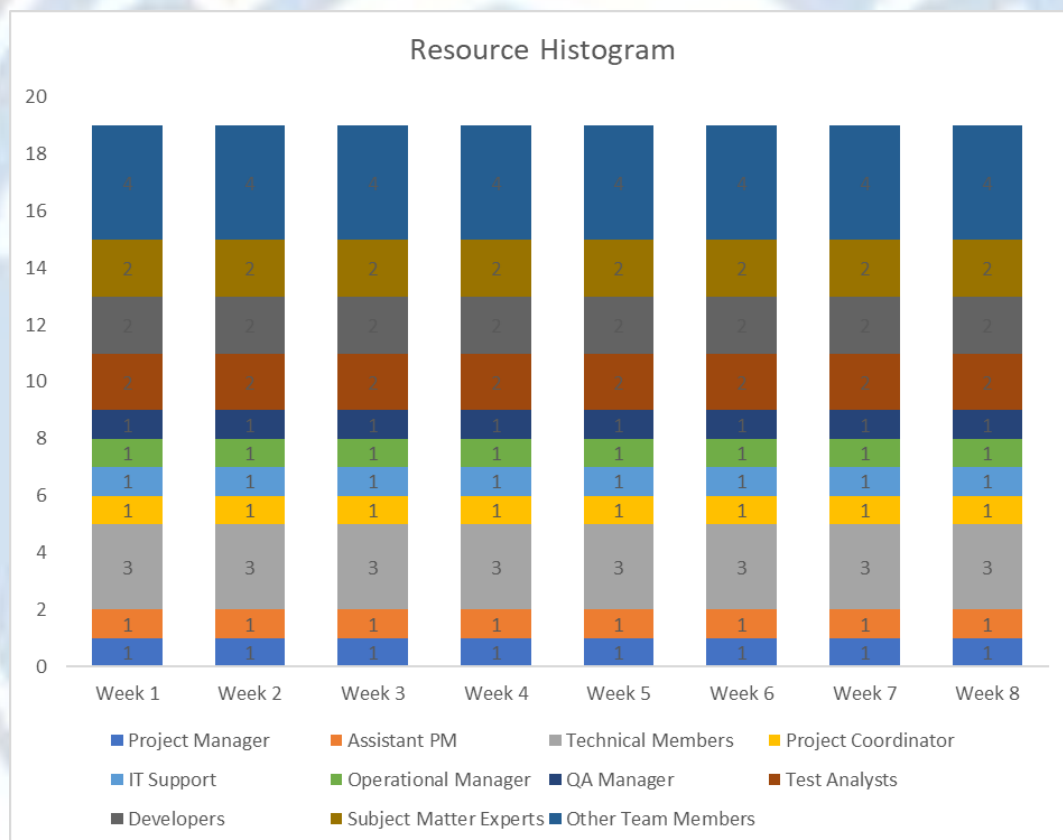


Figure 4: Resource Histogram

7.0 Schedule Baseline

7.1 Gantt Chart

The Gantt chart is an essential tool for project managers since it provides a visual representation of project timelines. In the framework of CIT Technologies' CCM System Integration Project, the Gantt chart displays tasks, durations, or interconnections in a time-based timeline. By providing a visual depiction of the project's chronology, managers can better plan, coordinate, & monitor the many moving parts. The Gantt diagram aids the project's team in determining key routes, allocating resources efficiently, and meeting milestones according to schedule by graphically depicting the interdependencies, start and finish dates, or progress of individual tasks. To better understand the project's timetable, dependencies, and possible obstacles, stakeholders might refer to this report. The Gantt diagram is essential in the current endeavor because it helps the team focus their work, improve their communication, and make better decisions. To guarantee the CRM system deployment runs well and accomplishes its goals within the allotted time period, it allows staff members to anticipate any delays, alter schedules as required, and maximize resource use.

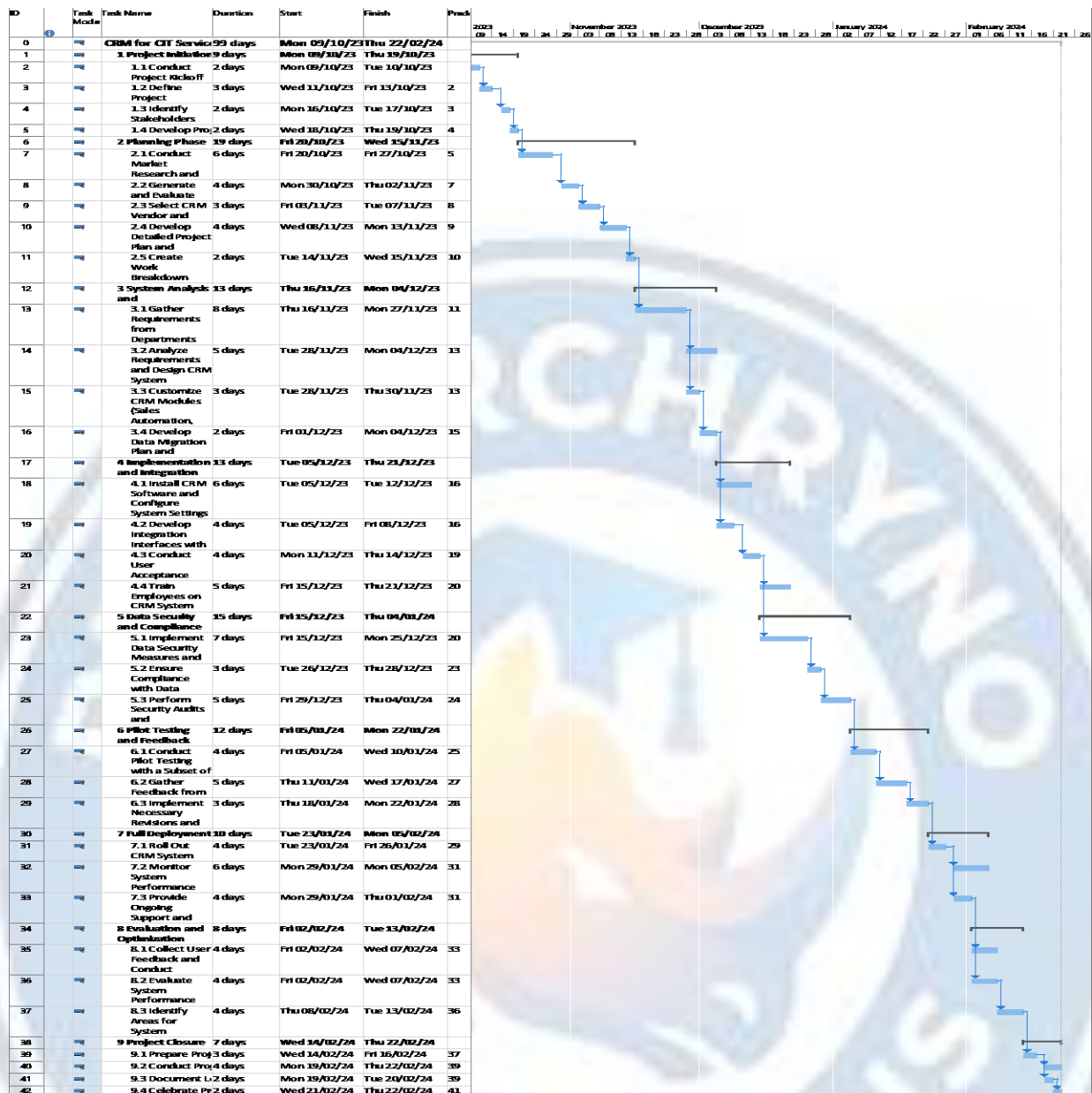


Figure 5: Gantt Chart

7.2 Network Diagram

The network diagram is a visual depiction of the connections between several project activities. The network diagram is crucial for CIT Technologies' CCM System Integration Project because it illustrates the interdependencies and interdependence between activities. The critical route, the most extensive series of activities that need to be performed on time to guarantee the timely completion of the project, may be easily identified by project managers thanks to this graphic representation of the assignment's process.

Drawing out the network structure for the current endeavor will help the team zero in on the most important tasks, make the most effective use of available resources, and plan ahead for

any delays. This representation is useful for risk management since it helps project managers see potential bottlenecks and prepare for them. Additionally, it improves team communication, which is crucial for ensuring that everyone remains on the identical page with regards to the order of tasks and their interdependencies.

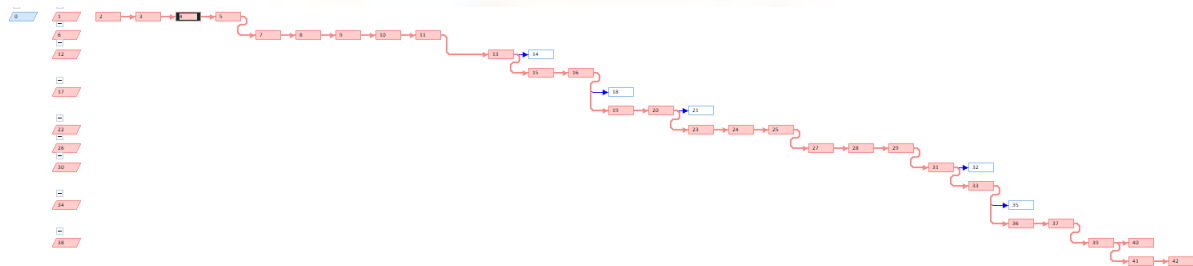


Figure 6: Network diagram

7.3 Critical Path Analysis

Project managers may utilize the method of critical path analysis to pinpoint the longest chain of activities that must be accomplished in order to finish the project on schedule. CPA is an integral part of the CIT Technologies CRM System Integration Project's organizing, coordinating, including oversight of risks.

Advantages of Critical Path Analysis:

- Prioritizing tasks by locating the critical route guarantees that the most important ones get done first.
- Assists in completing the project on time by allocating resources where they will have the most impact.
- Improves efficiency by maximizing the use of available resources and preventing bottlenecks in the process.
- It highlights dangers so that preventative steps may be taken to deal with them before they become major problems.
- Improves teamwork by giving everyone a clear picture of where they're going.

Role in the CRM System Implementation Project:

Surveys of the market, software customization, education for users, and data transfer are all interconnected parts of the customer relationship management project. Determining the critical route is essential for meeting the deadlines for these activities. Problems with the project might arise if any of these steps are delayed. The group in charge of the project may improve efficiency, make better use of available resources, and head off problems in their tracks with

the help of CPA. This approach guarantees that the CRM implementation project remains on course, finishes on time, and achieves CIT Services' goals. As such, the analysis of critical paths is an invaluable resource that ensures projects are carried out successfully, safely, and efficiently.

7.4 Critical Chain Analysis

The Critical Chain Assessment (CCA) is a methodology for managing projects that prioritizes the effective allocation of scarce time and money to the completion of the most crucial activities or resources. Critical Chain Assessment plays a crucial role in improving project processes & guaranteeing flexibility within the framework of CIT Technologies' CRM System Integration Project.

Advantages of Critical Chain Analysis:

- Increases productivity and eliminates bottlenecks by optimizing the utilization of resources.
- Tasks may be prioritized on the go to meet the evolving demands of the project with little impact on schedule.
- Uses well planned buffer zones to withstand the effects of volatility and shock.
- Reduces danger by making it possible to quickly adjust to changing circumstances, so that work may continue on the project.
- Allows the project to adapt quickly to shifting needs, priorities, or market circumstances, increasing the likelihood of its success.

Role in the CRM System Implementation Project:

CCA is necessary in the CCM project because to the interdependence of tasks and the need of meeting deadlines. If, for some reason, a vendor-related work is going to run behind schedule, the team may utilize CCA to reprioritize resources and keep the project on track by focusing on things like system customization and user training. Using CCA, the CCM undertaking will be able to keep moving forward, adjust to new obstacles as they arise, and ultimately be implemented successfully all while reaching the goals set by CIT Solutions. Using Critical Chain Assessment is a strategic method that helps teams deal with uncertainty, adapt to changing circumstances, and complete projects successfully.

Difference between critical path and Critical Chain

Table 8: Comparison of CPA and CCA

Aspect	Critical Path Analysis	Critical Chain Analysis
Focus	Task Dependencies	Resource Utilization and Flexibility
Task Management	Rigid Timelines Based on Dependencies	Dynamic Scheduling with Buffers
Resource Allocation	Fixed Allocation Based on Task Dependencies	Adaptive Allocation Based on Critical Tasks
Buffer Management	Often Not Utilized	Strategic Buffers for Adaptability and Uncertainty
Risk Mitigation	Limited Adaptability to Unexpected Events	Quick Responses and Adaptation to Risks and Challenges
Adaptability	Less Flexible in Handling Changes	Highly Adaptable to Evolving Project Requirements

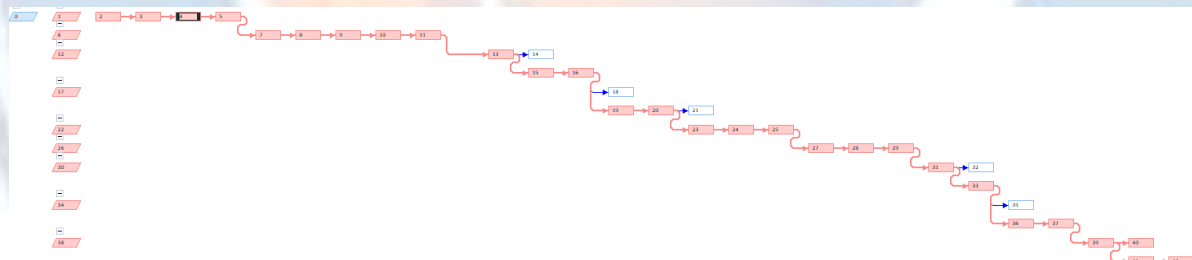


Figure 7: Critical Path Analysis

8.0 Risk Management Plan

Within the framework for the CRM System Integration Project, risk control and reduction include a thorough procedure for recognizing, assessing, and developing solutions to possible threats. This approach is a key document that will help our team identify possible risks and lessen the influence they have on the project's outcome. The business's approach to handling risks is outlined in a well-designed strategy. The first step in this strategy is to form an

organization-wide team of stakeholders. Together, the members of this team will scout out and evaluate any threats our firm could face as it rolls out its new customer relationship management system.

The CCM System Installation Project includes risk management as well as mitigation activities such as risk identification, analysis, and strategy development. Our strategy involves assembling a group of stakeholders from different backgrounds to evaluate both the micro- and macro-level threats facing the organization. By doing a thorough analysis of these elements, we can create preventative measures that will make the project more robust. We'll be able to overcome obstacles and ensure a successful rollout of CIT Technologies' new CRM system thanks in large part to the careful risk management strategy we've put up.

8.1 SWOT Analysis

The strengths, weaknesses, possibilities, & threats (SWOT) assessment is a common method used in the development of strategic plans. While possibilities and risks look outside the project, advantages and disadvantages analyse its inner workings. Teams may improve project organizing and making choices as a whole by recognizing these factors and then using that information to capitalize on strengths, fix flaws, capture opportunities, and guard against risks.

SWOT Analysis (CRM Implementation at CIT Services)

Strengths:

- *Knowledgeable Project Team:* The project advantages having a staff that is both highly competent & knowledgeable in CRM deployments. Their knowledge and experience guarantee a problem-free project launch.
- *Strong Participant Support:* There is a strong basis since key players within CIT Services are actively engaged and supportive. With their help, projects are better able to achieve organizational objectives.
- *Robust Vendor Business:* Strong Vendor Relationships: Our CRM provider and they have built a solid partnership, ensuring that they can count on them for dependable technical assistance and quick problem solving.

Weaknesses

- *Restrictions on Spending:* Financial restrictions may restrict the level of modifications or the inclusion of new features. The initiative's flexibility in exploring cutting-edge functions may be constrained by the need to stay within the allocated funds.

- *Partial In-House Experience:* There may not be enough technical experience on staff, thus the project may need to bring in outside help for certain tasks. It's possible that relying on others can slow down your ability to make quick choices.

Opportunities

- *Market Expansion:* Gaining a larger share of the market is a direct result of CIT Services' decision to implement an effective customer relationship management system. Revenue as well as market share might rise as a result of better handling of customer relationships.
- *Procedure Optimization:* The new system provides a chance to simplify internal procedures, which should lead to greater efficiency and output. Time and money may be saved via the automation of processes and data processing.

Threats

- *Technological Challenges:* Integration complications and compatibility problems might be potential technological obstacles. Implementation with the customer relationship management (CRM) program could be hampered by technical difficulties or software incompatibilities.
- *Competitive Landscape:* The market is very competitive, since other businesses in the same sector are likely to have adopted a comparable customer relationship management system. CIT Services' customer relationship management (CRM) system stays cutting edge because to constant innovation and adaption to industry changes.

8.2 PESTLE Analysis

The business or project's outside macroenvironmental elements may be evaluated using a strategic technique called PESTLE analysis. PESTLE refers to the interplay of several variables, including politics, economics, society, technology, law, and the environment. By taking a close look at these factors, businesses may better prepare for threats, seize opportunities, and arrive at choices that are in step with their external surroundings.

PESTLE Analysis (CRM Implementation at CIT Services):

Political:

- *Stable Political Environment:* Political stability ensures consistent policies, reducing the risk of sudden regulatory changes affecting the project.
- *Regulatory Compliance:* Adhering to data protection and business regulations is crucial. Changes in legislation could impact CRM implementation strategies.

Economical:

- *Budget Allocation:* Allocating funds: economic volatility might reduce available funds. Advanced capabilities of CRM need sufficient cash in order to be implemented.
- *Market Demand:* Demand in the Market An effective customer relationship management system is required to handle the anticipated surge in business for CIT Services' products and services should the economy improve.

Social:

- *Customer Expectations:* CRM functions are affected by societal developments in customers' preferred services. By keeping tabs on social movements, CRM systems may be tweaked to better serve customers' ever-changing needs.
- *Corporate Social Responsibility (CSR):* By keeping tabs on CSR activities and societal participation, a CRM system may help businesses conform to cultural norms and improve their brand's reputation.

Technological:

- *Technological Advancements:* Efficiency Gains Due to New Technology Adopting cutting-edge CRM tools improves productivity. Utilizing features like artificial intelligence-driven automation and data analysis necessitates keeping up with the latest updates.
- *Integration Capabilities:* The ability to integrate with preexisting infrastructure is crucial. The IT infrastructure of CIT Technologies should be compatible with new technologies for optimal efficiency.

Legal:

- *Data Protection Laws:* Laws pertaining to the security of personal information must be strictly followed. Secure client data processing inside the CRM system is ensured by a commitment to complying with laws.
- *Contractual Agreements:* Conformity between Legal duties Integrating legal duties with suppliers and customers into the CRM features is essential for maintaining contractual conformity.

Environmental:

- *Sustainability Initiatives:* Partnering with CIT Technologies' green goals, CRM may assist monitor and promote environmental sustainability activities.

- *Eco-friendly Technologies:* Energy-efficient & Eco-Friendly Techniques The CRM deployment is in line with environmental aims when these technologies are considered.



8.3 Risk Matrix

A risk assessment matrix is a visual tool that depicts possible hazards that might have an effect on a company. This kind of risk matrix is also known as a probability and severity risk matrix or a likelihood and impact risk matrix. The risk matrix is constructed on the basis of two overlapping factors: the chance that the risk event will take place, and the possible effect that the risk event will have.

8.4 Assigning the Risk

		Impact			
		1	2	3	
		Minor	Moderate	Major	
Probability	1	Rare	Low	Low	Medium
	2	Possible	Low	Medium	Hard
	3	Certain	Medium	Hard	Hard

Existing Operational Controls

Project Management Intervention

Senior Management Intervention

8.5 Risk Register

In the context of project leadership, a risk register is a standardized record used to catalogue, evaluate, rank, and keep tabs on possible threats and unknowns. It describes each risk, its likelihood, its potential consequences, possible solutions, and who is responsible for implementing them. Project teams may use the risk register for proactive management of risks, increasing the likelihood of a successful outcome while reducing any potential negative effects.

Table 9: Risk Register

Risk ID	Date Raised	Risk Description	Probability	Impact	Priority	Mitigation & Contingent Action	Risk Owner	Progress Status	WBS
CRM-R001	[Date]	Insufficient Budget	High	High	High	Implement cost-saving measures and seek additional funding if required.	Project Manager	Ongoing	WBS 2.2
CRM-R002	[Date]	Data Security Breach	Moderate	High	High	Enhance data encryption, conduct regular security audits, and train employees on security protocols.	IT Manager	Monitoring	WBS 2.1
CRM-R003	[Date]	Vendor Delays	High	Moderate	High	Regular follow-ups with the vendor, explore alternative vendors, and have a contingency plan for delays.	Procurement Manager	Ongoing	WBS 2.3
CRM-R004	[Date]	Inadequate Training	Moderate	Moderate	Moderate	Develop a comprehensive training program, involve end-users in system testing, and provide ongoing support.	Training Coordinator	Ongoing	WBS 2.4

CRM-R005	[Date]	Scope Creep	Moderate	High	High	Clearly define project scope, establish a change control process, and involve stakeholders in scope discussions.	Project Manager	Ongoing	WBS 2.1
CRM-R006	[Date]	Technical Integration Issues	High	High	High	Conduct thorough compatibility tests, involve IT experts in integration planning, and have a rollback plan in place.	IT Manager	Monitoring	WBS 2.2
CRM-R007	[Date]	Resistance to Change	Moderate	Moderate	Moderate	Conduct change management workshops, involve employees in decision-making, and address concerns empathetically.	Change Management Specialist	Ongoing	WBS 2.4
CRM-R008	[Date]	Inadequate Vendor Support	High	Moderate	High	Document issues, escalate problems to higher management, and consider legal action if vendor obligations are not met.	Procurement Manager	Monitoring	WBS 2.3
CRM-R009	[Date]	Insufficient User Involvement	Moderate	High	High	Actively engage end-users in requirements gathering, conduct regular feedback sessions, and adjust the system according to user needs.	Project Manager	Ongoing	WBS 2.1

CRM-R010	[Date]	Data Migration Errors	High	High	High	Perform extensive data cleansing, conduct pilot migrations, and have a rollback strategy in case of errors.	Data Migration Specialist	Ongoing	WBS 2.2
----------	--------	-----------------------	------	------	------	---	---------------------------	---------	---------

9.0 Cost Management Plan

Creating a strategy for estimating, budgeting, allocating, and controlling project expenditures is a crucial part of every project management effort. It includes things like budgeting, cost forecasting, and several other forms of cost management. Baseline costs for the project, including those for labor, materials, and any other inputs, are defined in the plan. During the project's duration, it details how expenses are to be estimated, how funds are to be allotted, and how spending is to be monitored and managed. The cost-management strategy also contains tactics for dealing with cost discrepancies, which helps to keep the project within its financial boundaries. To achieve project goals and maintain the company's financial stability, efficient cost management is essential. This is because it allows for the optimization of resources, the avoidance of budget overruns, including the making of well-informed financial choices.

9.1 Bottom-Up Budget

Accounting is a sophisticated budgeting method that accumulates expenses from the ground up to produce a comprehensive budget. Project responsibilities and their associated expenses are broken down and estimated using this technique. Following the compilation of these granular cost estimates, a more comprehensive budget is developed for the entire undertaking as a whole.

Among the many benefits of the bottom-up strategy is a more precise grasp of budgetary requirements because of the focus on individual aspects of the project. Having each individual activity or part examined fosters responsibility and openness. This method also improves overall oversight of the project by facilitating the detection and mitigation of uncertainties and hazards related to the project's many moving parts.

9.2 Cost Baseline

The authorized budget for a certain time period is represented by an expense baseline, which is an essential tool for the oversight of projects. It's like having a financial yardstick to compare real project expenses and progress against. The cost baseline is the total amount spent on a project up to that point, including all direct and indirect costs. Whenever a baseline has been established, all further deviations must be formally approved in order to maintain fiscal discipline. It lays out a detailed plan for how money will be spent, helping project managers keep the project within its budgetary constraints and in line with the business's goals. An essential part of every project strategy, the expense baseline ensures that teams can complete their work within their allotted budget as well as on time.

Table 10: Cost Baseline

Task Name	Cost
CRM for CIT Services	\$129,160.00
Project Initiation	\$13,760.00
Conduct Project Kickoff Meeting	\$4,000.00
Define Project Objectives and Scope	\$4,400.00
Identify Stakeholders and Roles (RACI Matrix)	\$3,760.00
Develop Project Charter	\$1,600.00
Planning Phase	\$20,920.00
Conduct Market Research and Needs Assessment	\$6,480.00
Generate and Evaluate CRM System Ideas	\$4,960.00
Select CRM Vendor and Finalize Contract	\$3,000.00
Develop Detailed Project Plan and Schedule (MS Project)	\$3,680.00
Create Work Breakdown Structure (WBS) and Task List	\$2,800.00
System Analysis and Customization	\$12,640.00
Gather Requirements from Departments (Sales, Marketing, Customer Support)	\$5,760.00

Analyze Requirements and Design CRM System Architecture	\$3,200.00
Customize CRM Modules (Sales Automation, Customer Support, Analytics)	\$3,120.00
Develop Data Migration Plan and Execute Data Cleansing Activities	\$560.00
Implementation and Integration	\$20,040.00
Install CRM Software and Configure System Settings	\$5,280.00
Develop Integration Interfaces with Existing Applications	\$4,640.00
Conduct User Acceptance Testing (UAT) for CRM Modules	\$3,920.00
Train Employees on CRM System Usage and Best Practices	\$6,200.00
Data Security and Compliance	\$10,960.00
Implement Data Security Measures and Access Controls	\$4,200.00
Ensure Compliance with Data Protection Regulations	\$3,560.00
Perform Security Audits and Vulnerability Assessments	\$3,200.00
Pilot Testing and Feedback	\$16,520.00
Conduct Pilot Testing with a Subset of Users	\$3,840.00
Gather Feedback from Pilot Users	\$7,800.00
Implement Necessary Revisions and Customizations	\$4,880.00
Full Deployment	\$15,600.00
Roll Out CRM System Across All Departments	\$4,000.00
Monitor System Performance and Address Issues	\$7,440.00
Provide Ongoing Support and Training to End-Users	\$4,160.00
Evaluation and Optimization	\$7,120.00
Collect User Feedback and Conduct Surveys	\$3,280.00
Evaluate System Performance and User Satisfaction	\$960.00
Identify Areas for System Optimization and Improvement	\$2,880.00
Project Closure	\$11,600.00
Prepare Project Closure Report	\$1,680.00

Conduct Project Review Meeting	\$4,320.00
Document Lessons Learned and Best Practices	\$3,520.00
Celebrate Project Success and Recognize Team Achievements	\$2,080.00



9.3 Cumulative Expenditure Curve

In the administration of projects, the entire expenditures spent over the course of a project are often shown graphically using a Cumulative Expense Curve (CEC). It illustrates the total cost of the project at different points in time, which is useful for both the project leadership and the stakeholders in understanding the project's financial health. The y-axis shows the total amount spent in the undertaking's currency (for example, USD), whereas the x-axis indicates time, generally broken down into phases or particular time periods. The rising cost curve represents increasing expenses as the project advances.

By examining the CEC, leaders of projects may determine whether or not spending is on track, out of control, or somewhere in between. Unpredicted costs or inefficient use of resources may be the cause of a sudden increase or a departure from the norm. Project managers may make educated judgments, adopt cost-saving initiatives, or relocate resources through comparing the Cost Estimated Cost (CEC) to the projected budget. When used for financial evaluation, the CEC allows for effective leadership to keep costs down and the project on track.

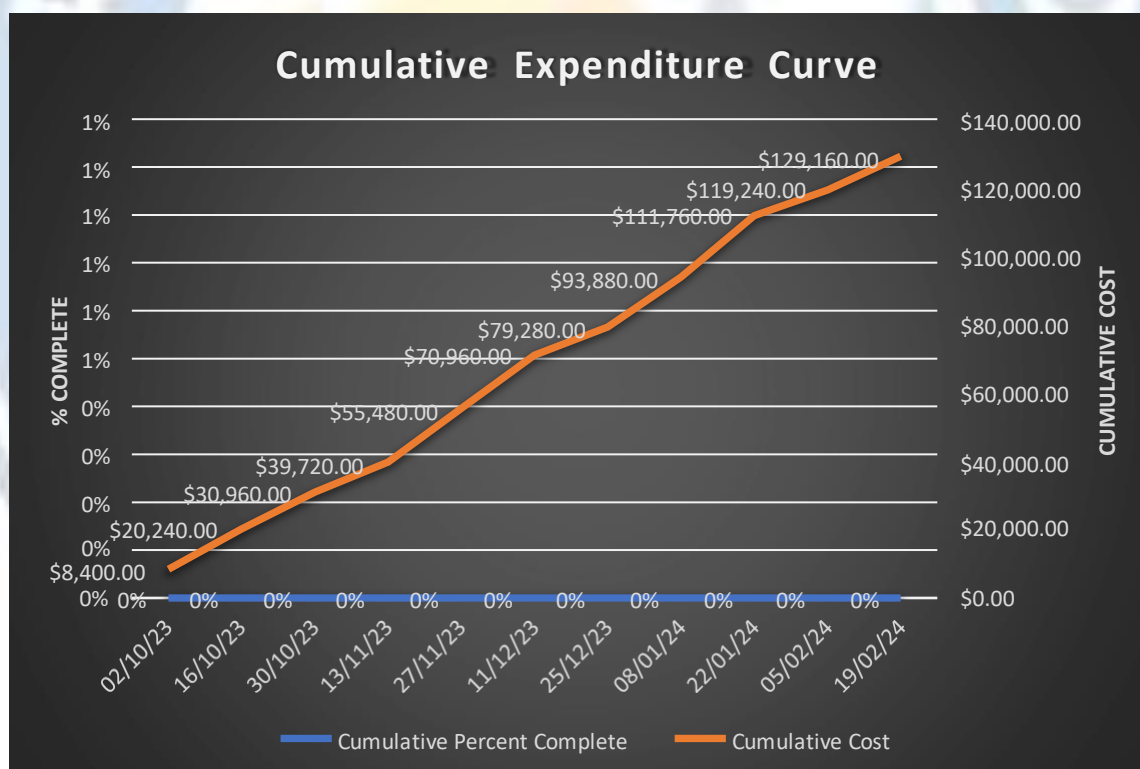


Figure 8: Cost S-Curve

10.0 Procurement Plan

1. Define Procurement Objectives: State them explicitly The goal is to buy CRM applications and services which satisfy CIT Services' needs for rapid deployment and integration with other systems.

2. Identify Suppliers and Vendors: Research on the market may help find CRM suppliers & service providers. Make a list of eligible providers based on reputation, knowledge, customer feedback, and technology. Select CRM providers that meet CIT Services' expectations.

3. Request for Proposals (RFP) Development: RFP Creation: Include project specs, requirements, assessment requirements, and commercial conditions in a thorough RFP. The request for proposal (RFP) should contain technical requirements, customizable choices, data security procedures, integration capabilities, education, as well as assistance expectations. Encourage suppliers to show their awareness of CIT Services' specific business concerns.

4. Proposal Evaluation:

- **Technological Evaluation:** Evaluate each proposal's CRM functionality, scalability, including system compliance.
- **Finance Evaluation:** Check the expenditure structure against the project estimate. Assess licensing, implementation, as well as upkeep costs.
- **Supplier Knowledge:** Assess the supplier's CRM installation experience, particularly in the same sector.
- **Client Sources:** Ask suppliers' past clients on their satisfaction with clients & execution of projects.
- **Compliance & Data Security:** Verify suppliers' data protection against industry standards. Assess their safety and vulnerability measures.

5. Vendor Selection: Choose the vendor with the best price, technical knowledge, and reputation. Contracts should explicitly state project dates, payment schedules, plus consequences for tardiness or disobedience.

6. Contract Award and Management: Set straightforward communication channels & project milestones after contract award. Use a strong contract management approach to monitor supplier performance and ensure project due dates and deliverables. Monitor their development and resolve concerns swiftly.

10.1 Procurement Process

The purchasing management strategy helps locate the best vendor. It describes how to discover goods and services from vendors for project success. Accurately establishing project criteria for contract start and conclusion justifies the need for external vendors.

Procurement Process for CRM Implementation at CIT Services:

1. Identify Procurement Needs:

- Assess CRM installation items, services, and competence.
- Develop a complete CRM hardware and software, consultancy, or other third-party purchase list.

2. Vendor Identification and Evaluation:

- Evaluate CRM solution suppliers' experience, reputation, & track record.
- Launch an RFI to collect preliminary information to reduce vendor alternatives.

3. Request for Proposal (RFP):

- Create a detailed RFP with project needs, technical specs, and assessment criteria.
- Request specific bids from chosen suppliers on technological approach, deployment technique, schedule, and cost.

4. Proposal Evaluation:

- Organize an impartial vendor proposal assessment committee.
- Consider pricing, technological capabilities, vendor expertise, as well as assistance services while evaluating offers.

5. Vendor Selection and Contract Negotiation:

- Choose the most cost-effective and project-aligned provider.
- Discuss deliverables, payment plans, warranties, or support.

6. Contract Award and Kick-off:

- Deliver the agreement to the chosen vendor.
- Initial conferences explain project objectives, roles, duties, and communication routes

7. Quality Assurance and Performance Monitoring:

- Evaluate vendor performance via KPIs.
- Check vendor deliverables, deadlines, and quality periodically.

8. Risk Management:

- Address procurement risks including vendor delays and poor delivery.
- Contingency planning may reduce procurement risks quickly.

9. Payment and Invoicing:

- Follow the contract repayment schedule.
- Manage good vendor connections with accurate billing and timely settlements.

10. Project Closure and Vendor Evaluation:

- Assess vendor performance after the project has been finished.
- Evaluate vendor performance and suggest areas of improvement after the project.

Supplier selection criteria include timelines for delivery, cost of the product, lifetime cost, capacity, that capabilities along with project management agreement finalization methods.

Table 11: Proposal Evaluation Score

Score Table

Score	Descriptor	Comments
5	Very Good	Selected the best
4	Above Average	
3	Average	Not good not bad
2	Below Average	
1	Very Poor	Bad proposal

Proposal Evaluation

Table 12: Proposal Evaluation Table

Criteria	Weighting	Proposal 1		Proposal 2		Proposal 3	
		Score	Total	Score	Total	Score	Total

Price	30%	5	1.5	4	1.2	3	0.9
Technical Advance	15%	4	0.6	5	0.75	2	0.3
Compliance with RFQ - Commercial T&C's	10%	3	0.3	2	0.2	2	0.2
Past Performance	15%	4	0.6	3	0.45	1	0.15
Service Level	10%	5	0.5	2	0.2	1	0.1
Recourse Availability	15%	5	0.75	4	0.6	3	0.45
References	5%	4	0.2	3	0.15	2	0.1
Total	100%		4.45		3.55		2.2



11.0 Communication Plan

An approach to communication is crucial for the project's achievement for both inside and outside communication. Interaction is part of project activities include seeking feedback on a delivery, verifying with another worker about a file's place of residence, receiving client information, and evaluating and reviewing. A communication strategy helps stakeholders contact & approach individuals for information and duties.

The document additionally describes project-wide transfer of information. It details the who, what, when, & how often information is received and accepted.



11.1 Communication Register

The communication registration helps monitor project interaction throughout its life cycle. Usually called as communications log. This formalizes communication recording for auditing. However, it enhances means of communication and processes and enables stakeholders to obtain rapid replies.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Project Updates	Share project progress and milestones	Email, Project Meetings	Weekly	Project Team, Stakeholders	Project Manager	Project Status Report	PDF, Email
Stakeholder Briefing	Provide updates on project direction	Presentation, Webinar	Monthly	Executives, Stakeholders	Project Manager	Presentation Slides	PowerPoint
Technical Discussions	Discuss technical aspects and challenges	Video Conference, Technical Workshops	Bi-weekly	Technical Team	Technical Lead	Technical Documentation	Word, PDF
Change Notifications	Inform stakeholders about changes in project scope	Email, Official Memos	As needed	Project Team, Relevant Departments	Project Manager	Change Request Form	PDF, Email

Client Updates	Provide updates on client requirements	Phone Calls, Email	Ad-hoc	Client Representatives	Account Manager	Meeting Minutes	Word, PDF
Risk Mitigation Plans	Share plans to address project risks	Project Meetings, Risk Workshops	Monthly	Project Team, Risk Management Team	Risk Manager	Risk Mitigation Strategy	Excel, PDF
Training Sessions	Conduct training for project-related tools	Webinars, On-site Sessions	Quarterly	End-Users, Training Participants	Training Coordinator	Training Materials	PowerPoint, PDF
Milestone Achievements	Celebrate project milestones and achievements	Team Meetings, Celebratory Events	Quarterly	Project Team, Stakeholders	Project Manager	Milestone Achievement Report	Word, PDF

12.0 Conclusion

This type of project with deep research into field of Project Management gives a valuable insight towards the learning that can be done with it. The company thorough project execution structure has been created by carefully analyzing essential components, tools, and approaches.

An in-depth comprehension of Projects Ideas, stressing their foundational importance, started the process. To integrate initiatives with the corporation's strategic goal, clear objectives & thorough financial explanations were key. Each project's objective was redefined using SMART criteria to ensure accuracy and achievability.

Management of projects with finesse relied on techniques and instruments. The Worker Breakdown organization (WBS) offered organization, while risk administration techniques protected projects from unexpected issues. Cost management saved money, streamlined resource allocation, or prevented budget overruns. Open communication and involvement helped stakeholder management build beneficial connections. Implementing tools like Gantt Diagrams & critical path evaluation helped schedule and prioritize tasks by revealing project characteristics. Communication that worked Plans were key to team overall communication with stakeholders. Proposed Evaluation criteria were objective, facilitating vendor selection & improving project results.

This study produces a roadmap for CIT Services alongside various initiatives. It guides the administration of projects excellence by integrating both theory and application. These results demonstrate educated decision-making, accomplishment, creativity, and long-term relationships as initiatives evolve in the changing corporate environment. This conclusion provides a launchpad for further studies, new techniques, and successful project undertakings.

References

- Jami Pour, M., & Hosseinzadeh, M. (2021). An integrated framework of change management for social CRM implementation. *Information Systems and e-Business Management*, 19(1), 43-75.
- Varajão, J., Trigo, A., Pereira, J. L., & Moura, I. (2021). Information systems project management success. *International Journal of Information Systems and Project Management*, 9(4), 62-74.
- Parahita, A. N., Eitiveni, I., Nurchahyo, D., Efendi, M., Shafarina, R., & Aristio, A. P. (2021, October). Customer Relationship Management System Implementation Process and its Critical Success Factors: A Case Study. In *2021 International Conference on Advanced Computer Science and Information Systems (ICACSIS)* (pp. 1-7). IEEE.
- Cieciora, M., Bołkunow, W., Pietrzak, P., Gago, P., & Rzeźnik-Knotek, M. (2020). Critical success factors of ERP/CRM implementation in SMEs in Poland: pilot study. *Zeszyty Naukowe. Organizacja i Zarządzanie/Politechnika Śląska*.
- Arbabi, H., Salehi-Taleshi, M. J., & Ghods, K. (2020). The role of project management office in developing knowledge management infrastructure. *Engineering, construction and architectural management*, 27(10), 3261-3287.
- Chiguvu, D., Tadu, R., & Ngwenya, M. (2019). Key factors in customer relationship management strategy success in the local government authorities. *Appl. Econ. Financ.*, 6(4), 72-84.
- Al-Salami, Q. H., Saadi, I. A., Sawadi, Z. T., & Saleh, R. K. (2019). The factors affecting customer relationship management implementation at DHL company in Baghdad, Iraq. *Cihan University-Erbil Journal of Humanities and Social Sciences*, 3(1), 43-51.
- Martins, J. (2023). *What Is Project Planning? How Write a Project Plan [2023]* • Asana. [online] Asana. Available at: <https://asana.com/resources/project-management-plan> [Accessed 8 Oct. 2023].
- Team, W. (2023). *Project Plan Guide: 6 Steps to Foolproof Project Planning* | Wrike. [online] Blog Wrike. Available at: <https://www.wrike.com/blog/foolproof-project-plan/> [Accessed 8 Oct. 2023].

Usmani, F. (2022). *Assumptions and Constraints in Project Management* |. [online] Pmstudycircle.com. Available at: <https://pmstudycircle.com/assumptions-and-constraints-in-project-management/> [Accessed 8 Oct. 2023].

Raeburn, A. (2022). *Work Breakdown Structure (WBS): What Is It? [2023]* • Asana. [online] Asana. Available at: <https://asana.com/resources/work-breakdown-structure> [Accessed 8 Oct. 2023].

Organ, C. and Watts, R. (2023). Work Breakdown Structure (WBS) In Project Management. *Forbes*. [online] 23 Mar. Available at: [https://www.forbes.com/advisor/business/what-is-work-breakdown-structure/#:~:text=A%20work%20breakdown%20structure%20\(WBS,deliverables%20into%20a%20single%20tool.](https://www.forbes.com/advisor/business/what-is-work-breakdown-structure/#:~:text=A%20work%20breakdown%20structure%20(WBS,deliverables%20into%20a%20single%20tool.) [Accessed 8 Oct. 2023].

Pmi.org. (2023). *Applying work breakdown structure to project lifecycle*. [online] Available at: <https://www.pmi.org/learning/library/applying-work-breakdown-structure-project-lifecycle-6979> [Accessed 8 Oct. 2023].

Everitt, J. (2022). *How to Create the Perfect Stakeholder Management Strategy* | Wrike. [online] Blog Wrike. Available at: <https://www.wrike.com/blog/how-create-stakeholder-management-plan/#:~:text=A%20stakeholder%20management%20plan%20is%20a%20written%20document%20that%20outlines,how%20your%20project%20turns%20out.> [Accessed 8 Oct. 2023].

Indeed.com. (2022). *How To Create a Stakeholder Management Plan* | *Indeed.com*. [online] Available at: <https://www.indeed.com/career-advice/career-development/stakeholder-management-plans> [Accessed 8 Oct. 2023].

Project Management Academy (2021). *What Is a Stakeholder Register*. [online] Project Management Academy Resources. Available at: <https://projectmanagementacademy.net/resources/blog/what-is-a-stakeholder-register/> [Accessed 8 Oct. 2023].

Pmstudycircle.com. (2022). *Stakeholder Register in Project Management* |. [online] Available at: <https://pmstudycircle.com/stakeholder-register-project-management/> [Accessed 8 Oct. 2023].

Indeed.com. (2022). *Human Resource Plan in Project Management: Definition and Steps* | Indeed.com. [online] Available at: <https://www.indeed.com/career-advice/career-development/what-is-a-human-resource-plan-in-project-management> [Accessed 8 Oct. 2023].

Pmi.org. (2023). *Human resource management and project management* | PMI. [online] Available at: <https://www.pmi.org/learning/library/human-resource-management-project-management-4772> [Accessed 8 Oct. 2023].

Indeed.com. (2022). *What Is a Project Organization Chart? With 4 Types of Groups* | Indeed.com Canada. [online] Available at: <https://ca.indeed.com/career-advice/career-development/project-organization-chart> [Accessed 8 Oct. 2023].

Harrin, E. (2017). *How to Create a Project Organization Chart*. [online] ProjectManagement.com. Available at: https://www.projectmanagement.com/articles/401556/how-to-create-a-project-organization-chart#=_ [Accessed 8 Oct. 2023].

Kantor, B. (2018). *The RACI matrix: Your blueprint for project success*. [online] CIO. Available at: <https://www.cio.com/article/287088/project-management-how-to-design-a-successful-raci-project-plan.html#:~:text=A%20RACI%20matrix%20is%20a,every%20step%20of%20the%20way>. [Accessed 8 Oct. 2023].

Good, L. (2023). *What Is a RACI Matrix?* [online] project-management.com. Available at: <https://project-management.com/understanding-responsibility-assignment-matrix-raci-matrix/> [Accessed 8 Oct. 2023].

Kantor, B. (2018). *The RACI matrix: Your blueprint for project success*. [online] CIO. Available at: <https://www.cio.com/article/287088/project-management-how-to-design-a-successful-raci-project-plan.html> [Accessed 8 Oct. 2023].

Landau, P. (2020). *Gantt Chart vs. PERT Chart vs. Network Diagram: What Are the Differences?* [online] ProjectManager. Available at: <https://www.projectmanager.com/blog/gantt-vs-pert-vs-network-diagram> [Accessed 8 Oct. 2023].

Gantt Chart Software (2023). *Gantt Chart: Definition and Examples*. [online] ProjectManager. Available at: <https://www.projectmanager.com/guides/gantt-chart> [Accessed 8 Oct. 2023].

Teamgantt.com. (2021). *How to Use a Gantt Chart Effectively* | TeamGantt. [online] Available at: <https://www.teamgantt.com/what-is-a-gantt-chart> [Accessed 8 Oct. 2023].

Slate, A. (2022). *Critical Path Method: A Project Management Essential* | Wrike. [online] Blog Wrike. Available at: <https://www.wrike.com/blog/critical-path-is-easy-as-123/> [Accessed 8 Oct. 2023].

ProjectManager. (2023). *Critical Path Method (CPM) in Project Management*. [online] Available at: <https://www.projectmanager.com/guides/critical-path-method> [Accessed 8 Oct. 2023].

AcqNotes. (2023). *Critical Chain Method* - AcqNotes. [online] Available at: [https://acqnotes.com/acqnote/tasks/critical-chain-method#:~:text=The%20Critical%20Chain%20Method%20\(CCM,or%20restricted%20resources%20are%20available.](https://acqnotes.com/acqnote/tasks/critical-chain-method#:~:text=The%20Critical%20Chain%20Method%20(CCM,or%20restricted%20resources%20are%20available.) [Accessed 8 Oct. 2023].

Wrike.com. (2023). *What Is Critical Chain Project Management?* | Wrike Guide. [online] Available at: <https://www.wrike.com/project-management-guide/faq/what-is-critical-chain-project-management/> [Accessed 8 Oct. 2023].

Scavetta, A. (2021). *How to Make a Risk Management Plan*. [online] ProjectManager. Available at: <https://www.projectmanager.com/blog/risk-management-plan> [Accessed 8 Oct. 2023].

MacKay, J. (2020). *7 Steps to Write a Risk Management Plan For Your Next Project (With Free Temp...* | Planio. [online] Available at: <https://plan.io/blog/risk-management/> [Accessed 8 Oct. 2023].

Schneider, A. (2022). *A guide to SWOT analysis in project management*. [online] monday.com Blog. Available at: <https://monday.com/blog/project-management/swot-analysis-project-management/#:~:text=SWOT%20analysis%20in%20project%20management%20is%20a%20method%20that's%20used,risks%20to%20address%20in%20advance.> [Accessed 8 Oct. 2023].

Everitt, J. (2022). *How to Conduct a SWOT Analysis in Project Management* | Wrike. [online] Blog Wrike. Available at: <https://www.wrike.com/blog/tips-swot-analysis-in-project-management/> [Accessed 8 Oct. 2023].

Siles, R. (2022). *What is the PESTEL Analysis?* [online] PM4DEV. Available at: <https://www.pm4dev.com/pm4dev-blog/entry/what-is-the-pestel-analysis.html> [Accessed 8 Oct. 2023].

GroupMap. (2016). *PESTLE Analysis, PESTLE Analysis Template - GroupMap*. [online] Available at: <https://www.groupmap.com/portfolio/pestle-analysis> [Accessed 8 Oct. 2023].

Wrike.com. (2023). *What is Cost Management in Project Management?* [online] Available at: <https://www.wrike.com/project-management-guide/faq/what-is-cost-management-in-project-management/> [Accessed 8 Oct. 2023].

Pmi.org. (2023). *Cost Management | PMI*. [online] Available at: <https://www.pmi.org/learning/library/cost-management-9106> [Accessed 8 Oct. 2023].

Schmidt, J. (2020). *Bottom-up Budgeting*. [online] Corporate Finance Institute. Available at: <https://corporatefinanceinstitute.com/resources/fpa/bottom-up-budgeting/> [Accessed 8 Oct. 2023].

GoCardless (2020). *What is the Bottom Up Budgeting?* [online] Gocardless.com. Available at: <https://gocardless.com/en-us/guides/posts/what-is-bottom-up-budgeting/> [Accessed 8 Oct. 2023].

StarAgile (2022). *What is Cost Baseline in Project Management*. [online] staragile.com. Available at: <https://staragile.com/blog/cost-baseline> [Accessed 8 Oct. 2023].

Wrike.com. (2023). *What is the S-Curve in Project Management?* [online] Available at: <https://www.wrike.com/project-management-guide/faq/what-is-the-s-curve-in-project-management/> [Accessed 8 Oct. 2023].

Humphreys, J. (2022). *How to Create a Procurement Management Plan — Katana*. [online] Katana. Available at: <https://katanamrp.com/blog/procurement-management-plan/#:~:text=Procurement%20management%20plans%20are%20documents,what%20needs%20to%20be%20procured> [Accessed 8 Oct. 2023].

Landau, P. (2020). *How to Make a Procurement Management Plan*. [online] ProjectManager. Available at: <https://www.projectmanager.com/blog/procurement-management-plan> [Accessed 8 Oct. 2023].

Martins, J. (2022). *How to Write an Effective Communication Plan [2023] • Asana*. [online] Asana. Available at: <https://asana.com/resources/communication-plan> [Accessed 8 Oct. 2023].

Waida, M. (2022). *What Is a Project Communication Plan?* | Wrike. [online] Blog Wrike. Available at: <https://www.wrike.com/blog/what-is-a-project-communication-plan/> [Accessed 8 Oct. 2023].

