

# AUSTRALIAN HARDWARE STORE CASE STUDY

## Introduction

This case study is about Wollongong store that has acquired another retail store called Newcastle store. For the new store, the company plans to create a new section on its existing website. Moreover, there is a need to make operational adjustments inside the company by updating and amending the policies and procedures of Wollongong with policies and procedures of Newcastle store. The project requires updating of the information on the website as well as prepared the staff to deal with the changes. Thus, this project requires communication to be made to the staff about the policies and procedures and provide them training to adapt to new policies and procedures to make the transition smooth for the company (PDA, 2007).

## PART A: PROJECT MONITORING AND IMPLEMENTATION

### APPENDIX 1: STATUS REPORTS

Status Report – 25%						
Item	Work completed to date	Milestone date	Revised/ actual date	Budgeted cost	Revised/ actual cost	Responsibility
Conducting reviews of the store's policies and procedures	1.1 Obtain the policy statements	25/04/2017				Human Resource Manager
	1.2 Scope Identification	28/05/2017				Human Resource Manager
	1.3 Make suggestions for changes in Newcastle store policies and on website	15/06/2017				Human Resource Manager

Amend the policies of Wollongong Store	2.1 List Amendments	06/07/2017				Project Manager
	2.2 Add a new section on the website for the Newcastle store	25/08/2017				Website Developer
	2.3 Make policy amendments on website	28/11/2017				Content manager
Inform the staff of the Wollongong about amendments	3.1 Update documents	01/12/2017				Project Manager
	3.2 Send emails to Staff	02/12/2017				Project Manager
	3.3 staff address to communicate modifications or amendments	04/12/2017				COO (BIS, 2010)
<b>Project Sponsor:</b>		<b>Version: 1</b>		<b>Project Client:</b>		
		<b>Date:</b>				
<b>Project Manager:</b>				<b>File Name: Update.doc</b>	<b>Page x of y</b>	

Status Report – 50%						
Item	Work completed to date	Milestone date	Revised/ actual date	Budgeted cost	Revised/ actual cost	Responsibility
Develop training	4.1 gather training	21/12/2017				Training

program	requirements					Coordinator
	4.2 create training schedule	24/12/2017				Training Coordinator
	4.3 develop training plan	26/12/2017				Training Coordinator
Arrangements	5.1 Assign Trainers	27/12/2017				Project Manager
	5.2 Prepare for Presentation	1/01/2018				Trainer
	5.3 Make arrangements for Venue	3/01/2018				Project Manager (Caltrans, 2007)
<b>Project Sponsor:</b>			<b>Version: 1</b>		<b>Project Client:</b>	
			<b>Date:</b>			
<b>Project Manager:</b>				<b>File Name: Update.doc</b>		<b>Page x of y</b>

Status Report – 75%						
Item	Work completed to date	Milestone date	Revised/ actual date	Budgeted cost	Revised/ actual cost	Responsibility
Execute training session	6.1 Give staff details of training	5/01/2018				HR Manager
	6.2 Ensure employees	8/01/2018				HR Manager

	attend training					
	6.3 Conduct the training program	10/01/2018				Trainer (Bright Hub Media, 2015)
<b>Project Sponsor:</b>			<b>Version: 1</b>		<b>Project Client:</b>	
			<b>Date:</b>			
<b>Project Manager:</b>				<b>File Name: Update.doc</b>		<b>Page x of y</b>

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## RECORD-KEEPING SYSTEMS

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## PROJECT RESOURCES

The key people working on or associated with this Project include:

**Project Sponsor:** He approves the budget required for the execution of the entire project. For this, a project plan with costing structure has to be presented to him by the project manager for getting approval. To be able to meet the timelines and budget requirements of the project, it is essential that the project sponsor agrees to the required funds which would only be possible if the project sponsor is given enough information. Thus, project manager would submit a detailed project proposal along with budgeting details so that decisions can be taken on budget (Changefirst Limited, 2009).

**CEO:** CEO would be responsible for managing and overlooking the working of the project by giving guidance and support to project manager in project planning and approvals. The CEO must have the project plan including delivery schedule and deliverable details such that he can assess the needs for controlling and directing and can provide support for the team. The project manager would keep the CEO informed of the milestones and the achievements on the project such that the CEO can take control of the things when needed (FME, 2014).

**COO:** COO would address the staff for giving the information about the changes that are made in policies and procedures of the company and would also inform them about the coming training encouraging them to attend. COO also acts as a project management and thus would be the person responsible for planning, executing and controlling the project. Project manager would gather the requirements from the store manager and training manager to prepare the project plan for which he would require support from the store managers and the CEO. Project manager would take care of activities like planning, creating schedules, monitoring activities and establishing control over them. He would also ensure that there is a close coordination between people working on the project including employees, developers, store manager, HR manager, etc (GDE).

**Wollongong Store Manager:** The inputs on the policies and procedures of Wollongong would be provided to the project manager by the store manager. He would also help project manager get trainees by encourage participation in them. As the Wollongong store manager would actually need to prepare the team to take over the roles required for management of the Newcastle store, he would be required to understand all the

policies and procedures of Newcastle store and thus, should also be made the part of the training program for learning. Moreover, he would take a major part in requirement gathering so as to understand the needs for modification or amendments. Project manager would involve him in requirement gathering stage both for training and for the development of the website.

**Newcastle Store Manager:** The inputs on the policies and procedures of Newcastle would be provided to the project manager by the store manager. He would also help project manager get trainees by encourage participation in them. Newcastle store manager would have to not just be aware of the procedures and policies of his own managed store but also of the Wollongong for which the project manager would be providing him the details that he can use to come with the ideas on amendments required in the Wollongong store procedures.

**IT Manager:** IT software and hardware resource requirements would be taken care of by the IT manager. IT manager would make the arrangements for the development of the website including assigning of the developer for the website or provision of the systems as for the development.

**Web Master:** Web master would be taking care of the development needs of the website and would get the changes or additions done by the developers. The project manager would involve web master in the requirement gathering for training to understand how policies and procedural additions would be posted on the website such that the staff could be trained on the same thing.

**Content Manager:** Content manager would made additions on the website pages about new policies and procedures. For this, the content manager would need to develop the content referring to the policies and procedure documentation of the Newcastle store which could be provided by the project manager.

**Training Manager:** He would get trainers, develop the plan for training, help trainers finalize content, coordinate with them, ensure that staff attend training and assist trainers during execution of plan. The training manager would be involved in making the plan for the training as project manager would be sharing the information with him about the new policies and procedures, how they would impact the existing systems of the Wollongong such that training content and plan can be chalked out.

**Staff:** Staff of Wollongong and Newcastle stores would attend the training program and in case they are unable to appear, they would inform the respective store manager in advance.

## RESPONSIBILITIES

ITEM	MILESTONE DATE	RESPONSIBILITY
Document the additions required to be made in Wollongong policies for integrating policies of Newcastle store	28th Oct 2017	Wollongong store Manager and Project Manager
Create a new section for Newcastle on Wollongong website including the listing of products and services as well as updating of the policies and procedures as an announcement for the internal staff.	5th Nov 2017	IT Manager and Newcastle Store manager
Make amendments to the Wollongong policies and procedures.	28th Nov 2017	Content Manager
communicate the amendments to staff through the COO address as well as inform them about the training program they needed	4th Dec 2017	Project Manager and Newcastle Store Manager (Inter Agency Policy and Projects Unit, 2008)

to attend to learn in details about the new policies and procedures that would be adopted as a result of the acquisition		
Develop a training program for employee on new policies after gathering requirements from the training manager and store managers covering concepts on policies and procedures.	2nd Jan 2018	Training Manager
Execution of the employee training after hiring training and making arrangements for the delivery of the same on the allotted date.	10th Jan 2018	Training Manager and Project Manager (Metafuse, Inc.; Core Performance Concepts, 2015)

## RESOURCE AND COST PLANNING

DELIVERABLE/MILESTONE/PHASE	RESOURCE	COST
Documentation	Store Manager	-
Hardware Store Section <ul style="list-style-type: none"> <li>Details of products and services to be listed</li> <li>Addition of interfaces for the Newcastle Staff</li> </ul>	IT Manager IT systems	\$300
Online Amendment <ul style="list-style-type: none"> <li>Details of the amendments to be made in policies and procedures</li> </ul>	IT Manager & Store manager IT systems	-
Employee communication <ul style="list-style-type: none"> <li>Minutes of the requirement gathering meeting</li> <li>Email about the training schedule and venue</li> </ul>	Project Manager, Store Manager, and staff Intranet and Emails	-
COO address to staff <ul style="list-style-type: none"> <li>Address from COO on changes made in policies and procedures and announcement of training</li> </ul>	Project Manager, Store Manager, and staff Meeting room	\$170
Training schedule <ul style="list-style-type: none"> <li>Preparation of training schedule by project manager and training manager</li> <li>Hiring of trainer for the scheduled date of training</li> <li>Email of schedule to all employees of the organization</li> </ul>	Project manager and training manager System and software	-
Program execution <ul style="list-style-type: none"> <li>Ensure and confirm staff attendance</li> <li>Make the trainer deliver training program</li> <li>Recording of the training program</li> <li>Uploading of recorded sessions on the intranet for employees</li> </ul>	Staff, trainer, project manager, and Newcastle store manager Training hall	\$1010 (WSDOT, 2015)

## RISK MANAGEMENT

The risk management plan includes identification of risks, their assessment in terms of the level of impact they can have on the project outcomes and the response strategy that the management can take to respond to the risk. A risk can have a low, medium or high level of impact on the project. The management strategy could be

mitigation in case the risk has already occurred so that the consequences can be minimized, avoiding of the risk from the start itself from occurring, ignorance if the risk does not impact the project much or transferring the risk to another party who could be made responsible for the consequences and compensate for that. If the impact levels are low then the risk can be ignored while in case of high impact levels, the risks are transferred, avoided or mitigated.

RISK	LEVEL (HIGH/MED /LOW)	MANAGEMENT STRATEGY
Trainers are not available on the planned date for training	High	<p><b>Avoid:</b> Check the schedule of the trainer schedule to ensure that they are available on planned date. Keep a backup trainer ready with training requirements so that he or she could be called in the case of emergencies to take over the training</p> <p><b>Mitigate:</b> If trainers cannot come on training date because of unavoidable event, staff can be informed about it and a new date can be communicated.</p> <p><b>Risk Transfer:</b> Ask the trainer to book himself for another date for the same cost in compensation for not making delivery on the dates decided (Oracle, 2011).</p>
Some employees do not attend training	Medium	<p><b>Mitigate:</b> Record the minutes of the meeting as well as session and post the same on the intranet such that employees who could not attend the meeting could also get information.</p> <p><b>Risk Transfer:</b> Make the store manager responsible for providing training to the employees who did not attend eliminating the need for providing same training to them again.</p>
Some staff members do not get the information about the training	Medium	<p><b>Avoid:</b> Keep all the employees in loop over email while informing them and take support from store managers to communicate about training to their juniors.</p> <p><b>Mitigate:</b> Take staff attendance and if anyone is absent, try to get him or her to attend and in case even that is not possible, send them the information about session records.</p>
The training program cannot be completed within time	Medium	<p><b>Avoid:</b> Take inputs from the staff as well as trainer to make an assessment of time that would be required for training and keep buffer time for the actual training schedule so that it does not exceed</p>

		<p><b>Mitigate:</b> Try extending session seeking permission from staff if small part is remaining to be covered but if a large portion of content that is important could not be covered, take new approvals for additional training session on a future date</p>
Some policies and procedures could not be covered in training	High	<p><b>Avoid:</b> Have sufficient training time allotted that could cover all decided topics or take only important topics in the training so that the schedule do not exceed and topics are left out. Keep attendees informed that they can ask questions only at the end to ensure that no topics are left out during presentation.</p> <p><b>Mitigate:</b> Inform store managers about the left over content and ask them to train their staff on that. Send the remaining content to employees over email to read.</p>
Training room is unavailable on the day of training	High	<p><b>Avoid:</b> Check the availability of the venue a day before training and if there are any chances of problems then get the alternate venue fixed and inform the staff about changes in venue.</p> <p><b>Mitigate:</b> If for any reason training room does not remain available, make an immediate alternate arrangement by taking another meeting room to finish the work</p>
Technical issues during training	High	<p><b>Avoid:</b> Run a check on all equipments and electronics required in training to see if they are working fine before training. Make immediate alternate arrangements in case of any equipment failure (Inter Agency Policy and Projects Unit, 2008).</p> <p><b>Mitigate:</b> Have backup arrangements ready before presentation such that if any technical issues occur suddenly, they could be used to take over.</p>
Trainees may not get sufficient learning from presentation	High	<p><b>Avoid:</b> Hire the best trainer for delivery who knows how to explain concepts and also how to engage audience. Make sure that the employees understand the importance of paying attention to the training content so the take it seriously</p> <p><b>Mitigate:</b> If important topics are left out during presentation, make an arrangement for another training in future to cover them</p>



STAKEHOLDER	INFORMATION REQUIRED	WHEN REQUIRED	FORMAT
CEO	Project Plan	Before the project begins	Email project plan to COO and to CEO Meeting between CEO and project manager for project plan approval
CFO	Project Schedule	Before the project begins	Email project plan to CFO Meeting between CFO and project manager
Project Manager COO	Amendment Training Needs Resource Requirements	Before creating project Plan	Meeting between training and store managers to get details of required amendments of polices and procedure
Store Managers	Training Schedule Resource requirements	Prior to training	Meeting between training manager and store manager. Email staff to communicate plan for the training
Staff	Training Schedule	Prior to training	Email training schedule to trainers, managers and staff
Training Manager	Training requirements	Prior to training plan development	Gather training requirements from staff Collate and send requirements to training manager Meet training manage to finalize content
Regulators	Legal and Regulatory compliance	Before training plan development	Document legal and regulatory requirements Communicate regulatory needs to COO through email (Metafuse, Inc.;Core Performance Concepts, 2015).

## DELIVERABLES

- Amend policies and procedures Newcastle Store to Wollongong Store
- Create a new section for Newcastle Store on Wollongong website
- Publish amendments on the new section of the website
- Communicate staff about amendment and training plan
- Plan and deliver training to staff (The State of Maryland , 2015)

## PART B: PROJECT FINALISATION

## APPENDIX 2: PROJECT CLOSURE REPORT

**Post-project review report**

**Name of project:** Update and train employees on changes made in policies and procedure of Wollongong to add operations of Newcastle store

**Date and location of meeting:** 12th Jan 2017

**Names of attendees:** Project Manager, Training Manager, Project Sponsor, Newcastle Store Manager, Wollongong store manager

**1. Overview by project manager: (brief summary of highlights and achievements, etc.)**

A training plan has been developed and the date for COO address for informing employees about the training plan has been decided. Actual training content and arrangements have to be made and trainees have to be informed about it

**2. Review by team of the course goals, objectives/deliverables**

	Met	Missed	Partially met	Comments
<b>Project goal – Manage projects</b>	Yes			The project was completed within time and within budget
<b>Objectives/deliverables</b>				
Hardware Store section	Yes			
Amendments	Yes			
Employee communication	Yes			
COO addressing	Yes			
Training scheduling	Yes			
program execution			Yes	Some of the policy topics remained to be covered but as they are easy to understand, only an email would be sent to the staff giving away information

<b>Success criteria</b>				
All activities completed within time and within budget	yes			
Training quality was good	Yes			Trainer was a highly experienced and engaging person who could provide a value addition to employee learning.
<b>Budget/value for money</b>	Yes			\$1,500

**3. What worked well; what could have gone better?**

The trainees were engaged well and were asking too many questions which took much time which is why some topics could not be covered in the training. Trainees could have been restricted from asking questions during the session

<b>Worked well</b>	<b>Could have gone better</b>
Schedule creation Training delivery Store section creation Policy amendment	Training schedule

**4. Lessons learned**

If the project planning is done properly then risks can be minimized and with addition of risk management procedures, the risks can either be avoided or mitigated well  
A project must involve all stakeholders in the requirement gathering stage so that all their expectations are fulfilled.  
Staff can be involved while designing the plan for training so that it can be assessed if the content would be sufficient or can be covered within planned duration.  
The training program could be run in a controlled manner with only specific time allotted to questions and answers such that there are no delays in completion of the project.

**5. Next steps/improvement plans/what could you do better in your workplace?**

Inputs may be taken from the staff before planning the content and scheduled for training in future such that the content which is most essential is put first and is not missed out. Moreover, a rule may be laid by the trainer during the training that questions can only be asked after the training is over so that the time is not spent on questions but more on the core content of the presentation.

**6. Archiving of records**

The training session is recorded and uploaded on the intranet and the same is communicated to employee who can access the recording for next 30 days. The links to the records would be emailed to the employees encouraging them to watch videos. A copy of the training videos would also remain with the project manager.

**7. Transition plan for project team members**

After the training is over, staff would have to stop using old procedures and adopt new procedures for managing new operations in the following ways:

- Staff would first be tested on their understanding of procedures
- People having good knowledge about new operations would be selected for allotment to new team
- Store manager for Newcastle store would have meeting with new staff and provide guidance
- Staff would be assigned various responsibilities by the store manager
- Store manager would make sure that the staff works according to the new policies and procedures-

**PROJECT CLOSURE REPORT APPROVALS**

**Prepared by** \_\_\_\_\_

([Job Title])

**Approved by** \_\_\_\_\_

([Job Title])

\_\_\_\_\_

([Job Title])

\_\_\_\_\_

([Job Title])

**Approval date** \_\_\_\_\_

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