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|  | Case Study |

Native Bush Spices Australia is based in Coffs Harbour, NSW. The business was established in 2010 to cater for a demand for Australian native food products. The company has organic certification. The company manufactures and retails a range of organic, Australian native foods including Native herbs and spices, Native herbal teas and Native fruit jams and conserves.

Currently the business is selling its products through a number of small supermarkets and health stores throughout Australia. The company also has a very basic website that includes four pages: Home, About Us, Products and Contact Details.

The company’s overall business objectives for the next three years are to increase sales and create brand awareness, develop a broader product range, as well as expand into overseas markets, most likely Hong Kong, Japan and Singapore.

The company’s target customers are those that enjoy gourmet foods.

The age range of Australian consumers buying products is between 35 and 65.

Most consumers are health conscious, care about protecting the environment and have an average annual income of $80,000.

The company currently employs the following staff in its head office: CEO, Operations Manager, Marketing Manager, Customer Service Officer and two administration staff. Ten staff are employed in the factory making and distributing the products.

It has been decided that a new website is needed as part of the marketing communications strategy. The new web site is seen as a critical part of the company’s expansion strategy. The company has also decided to expand their product range at the same time to meet the market demand from a broader customer base.

After doing extensive vendor due diligence, the Operations Manager has selected ***Manager Networks*** to oversee the website design project as well as the product range expansion project (Manager Networks is an organisation that provides networking events for business people across Australia.  They have recently expanded their business to include professional consultancy services).

As a project manager (employed by Manager Networks), you have been asked to manage the web design project and product expansion project for the client, Native Bush Spices Australia.

You will report to/receive instruction from the Operations Manager of Native Bush Spices Australia. As with all projects, project authorisation needs to be obtained, as well as a detailed project scoping conducted prior to the project’s commencement.

Information specific to Web design project (Sections 1 and 2 of the Project Portfolio)

The Native Bush Spices Australia’s Operations Manager has provided the following information to assist with the initial project authorisation and the following development of the project management scoping document:

* Inclusions: Website is to include a shopping cart, so customers can order products directly through the website. Customers should also be able to access recipes and general information about the health benefits of bush spices.
* New website implemented within 2 months from the implementation of the project plan, sales show 20% increase over 12 months, market research shows brand increasingly recognised.
* Budget available for development of website is $8,500.
* Website to be developed by a skilled contractor. SEO optimisation also required. Content needs to be professionally written.

Information specific to the Web design project (Section 3 of the Project Portfolio)

After a period of time, the project scope was approved and implemented. It has now been running for four weeks, and the website is progressing.

The status of the project is as follows:

The content has been developed for the website within the required timeline of 1 month from the implementation of the project plan, and at the specified cost. A public relations consultancy company, PR Pulse wrote the content for $5000. You have signed off on the content, as it met the brief.

You have just received an email from the Marketing Manager:

*Dear Project Manager*

*Thanks for sending through the content for the website written by the consultants, PR Pulse. I have reviewed their website and services they offer and, given the quality of the work provided, I would like you to prepare one newsletter and at least four blogs to be included as part of the web site launch. I think this would greatly increase the quality and usefulness of our website. I have spoken to Marlene from PR Pulse who advised that this work would be at a cost of $2,000 which I would hope could be accommodated within the project timeline. Marlene has requested a formal email to confirm that she can go ahead with the changes.*

*Please fill out a project Change Request Form and send it to the Operations Manager for authorisation. I have already spoken with the Operations Manager and have their verbal approval.*

*Kind Regards*

*Marketing Manager*

The Manager Networks Project Manager has been surprised at the hands-on involvement of the Marketing Manager, especially his conversation with PR Pulse without his knowledge.

Three quotes have been received from website developers as follows:

* Bestweb Design $5,750, timing indicated as 4 weeks. The examples they gave of websites that they have developed do not seem to be suitable.
* Visualweb $8,000, timing indicated as 8 weeks. The examples they gave of websites that they have developed seem to be along the lines required.
* Web designs Australia $9,000, timing indicated as 12 weeks. The examples they gave of web sites that they have developed seem to be along the lines required.

Information specific to Product range expansion project (Sections 1 and 2 of the Project Portfolio)

The Native Bush Spices Australia’s Operations Manager has provided the following information to assist with the initial project authorisation and the following development of the project management scoping document:

* Inclusions: Product range should be expanded to include complementary products such as native plant seedlings from another organisation (a collaborative relationship is required with an appropriate organisation). Research is required to identify market requirements and demand for specific products.
* The cooperative relationship should only be established once market research has been performed.
* Collaborative relationship established within 6 months from the implementation of the project plan. Market research shows increases customer satisfaction and suitable demand for the new products.
* Budget available for research and development of new product range is $6,000.
* The collaborative relationship with other organisation must sell products under the “Native Bush Spices Australia” brand. Market research should target a range of generations.

Information specific to Product range expansion project (Section 3 of the Project Portfolio)

After a period of time, the project scope was approved and implemented. Five weeks have passed and market research (cost of $2000) has been conducted for the following age groups:

* 15 – 22 years old
* 23 – 30 years old
* 31 – 35 years old
* 36 – 45 years old
* 46 – 60 years old
* 61+ years old.

In response to the research, you have just received an email from the Marketing Manager:

*Dear Project Manager*

*Thanks for sending through marketing research results. I have reviewed the results. Although they are comprehensive, I would like more information about the people your surveyed (gender, profession, income bracket etc.).*

*I realise that further analysis and even market research is required. However, we cannot make an informed decision before we fully understand the customers.*

*Please will you adjust the scope of this project to include results according to a breakdown of customer information. The marketing team estimates this additional research to cost $3000 and take another 3 weeks.*

*Kind Regards*

*Marketing Manager*

Once again, the Manager Networks Manager is frustrated that the Marketing Manager is making decisions and not going through the Operations Manager. Only once market research is complete, an appropriate cooperative partnership can be identified and established.

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|  | Native Bush Spice Australia |

Project Management Policy and Procedures

1. Purpose

Native Bush Spice Australia adopts a standard approach to project management to ensure the consistent use of project management procedures and templates.

This policy and procedure is designed to specify the requirements for managing projects to ensure that project scope is articulated, stakeholders are involved, risks are managed, and project benefits are maximized.

This policy and procedure applies to all projects.

2. Types of project

Generally, there are three types of project: small project, medium project and large project which is determined through the project amount.

In each of the above cases the following staff are to be involved.

**Small Project (under $10,000)**

* Project Manager
* Project team member (generally the Customer Service Officer)
* Senior management team to approve project management scope plan and kept informed of progress.

**Medium Project ($10,000 - $50,000)**

* Project Manager
* Project team member (generally the Customer Service Officer)
* Senior Manager to be regularly updated on progress
* Senior management team to approve project management scope plan and kept informed of progress.

**Large Project ($50,000 plus)**

* Project Manager (Senior Manager)
* Project team member (Senior Manager)
* Project Steering Group

Project staff will vary depending on the type of project.

3. Project Phases

All projects should progress through the following project phases.

**Stage one**

Stage one of the project management process is triggered when a staff member or team identifies the need to solve a problem, improve a process or implement a new service. It defines what the project will attempt to achieve based on appropriate business justification.

At this stage, the staff member or team must complete the project authorisation template to gain authorisation for the detailed project scope management planning.

**Stage two**

Stage two of the project management includes defining and documenting the project scope in the project scope management plan.

Key tasks involved in this phase include:

* Identifying project benefits, outcomes and outputs
* Making an initial assessment of project size and required staff.
* Completing a project scoping using the Native Bush Spices Australia project scope template.

The project scope management plan must be completed within 2 weeks of the project authorisation being given approval.

The project scope management plan must be reviewed by the senior management team prior to final approval. Where any issues are identified from the project management plan scoping, it is possible that the project may not proceed.

**Stage three**

The purpose of this phase is to determine how the project will be executed. This means developing a project management plan based on the project scope. The Australian Native Bush Spice project management template should be use. Essentially the preparation of a detailed model of the work required to achieve the project objectives is required and confirmation of the budget and project arrangements suggested in the Business Case. Risks are also defined and documented in a risk management plan A detailed schedule is also prepared.

**Stage four**

The purpose of this phase is to implement the project. Regular reports of the progress of the project should be provided to relevant staff, as well as regular meetings as outlined in the project management plan.

**Stage five**

This is the final phase of the project and is the formal closure of the delivery component of the project. It has two main outcomes:

* The handover of project outputs to the operational areas responsible for ongoing support and maintenance (if applicable to the project); and
* The evaluation of the success of the project

The evaluation of the success of the project is important part of the project. The actual project outcomes and cost must be compared with the planned outcomes and determine whether what was achieved by the project was worth the amount invested.

Project recommendations to be included in project evaluation report should include a recommendation to close project.

4. Project Communication

It is expected that the project team meet at least weekly depending on the size of the project. A brief email summarising the meeting outcomes must be sent to senior management.

Weekly reports must also be sent to senior management regarding project progress.

All project issues arising must be documented in the project issues register.

5. Project record keeping

A project folder is to be established for each project. The overall folder should be the name of the project e.g. Human Resources Information System Project and sub-folders should be created including folders for the business case, project management plan, project reports, minutes and any other relevant folders e.g. briefs to contractors. All documents should include the version number, date and title of document.

6. Project change requests

Changes to a project’s scope should be handled as described:

1. Change request initiated and documented in a Change Request Form
2. The request should be investigated initially by the project team member and importantly should be able to define the business value to the project.
3. The Operations Manager will then analyse if the change is feasible and give the initial approval to proceed.
4. Any changes will need to be recorded and the WBS updated if required.
5. If no changes approved, then this should still be logged.
6. Appropriate changes to the budget should also be incorporated if relevant
7. The project definition should be updated if the approved scope change results in a substantial change to the overall project.

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|  | Native Bush Spice Australia |

Project Authorisation

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| --- | --- |
| Project Name: |  |
| Project Manager: |  |
| Project Overview: | *Provide a broad project overview.* |

1. **Intended Outcomes**

*Briefly describe the project goals and deliverables, as well as the benefits and impact on the organisation.*

1. **Resource Requirements**

*Briefly describe the resources that will be required to conduct this project, including the proposed budget.*

1. **Proposed Schedule**

|  |  |
| --- | --- |
| Planning commence |  |
| Planning complete |  |
| Delivery commence |  |
| Delivery complete |  |

1. **Proposed Project Governance Arrangements**

*Briefly describe the proposed project governance arrangements in accordance with the project management policy and procedure.*

We request authorisation to proceed to the detailed planning of the project.

Signature:

Name and title:

Date:

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|  | Native Bush Spice Australia |

Project Scope Management Plan

Introduction and background

*Provide an introduction and background to the project, including business needs and drivers.*

Criteria for success

*Outline the criteria for success for the project.*

Project assumptions

*Describe at least one project assumption.*

Project dependencies

*Describe at least one factor on which the project is dependent.*

Project constraints

*Describe at least one project constraint.*

Preliminary risk assessment

*Describe at least two project risks.*

Project stakeholders

*Identify the project stakeholders,*

Work breakdown structure

*Develop and document the Work Breakdown Structure.*

Scope control process

*Describe scope control management processes that will be followed.*

Project change request form

This form is to be completed upon a request for a change to a project.  The change must be approved by senior management.

Client name:

Project title:

Requested by:

Reference/client id:

Contact number:

Date:

Description of change

|  |  |
| --- | --- |
| Changes required: |  |
| Priority level:  High Medium  Low |  |
| What are the affected phases and work activities? |  |
| Will there be a change in the budget? |  |
| Will there be a change in the timeline? |  |
| Reference any components of the project that will be affected: |  |
| State the business value of the change: |  |
| What actions are required for the change? |  |

Status

Pending approval Initial approval Final approval Rejected (please tick).

Actions

Update changes recorded in project management file Signed by:

Changes updated in the WBS Signed by:

Changes made to the budget Signed by:

Update changes to the project timeline Signed by:

Updates made to the project definition Signed by:

Approved by:

Full name:

Signature:

Date:

*The request for change form should be kept in the project management file (even if it has been rejected).*

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|  | **Internal Communication Policy and Procedures** |

Native Bush Spices Australia aims to enhance and streamline communications (internal and external) to reinforce the vision and strategic priorities. As such, we will continue to develop and trial new communication platforms, channels, and tools to improve information sharing and collaboration between all staff members.

This policy is to be implemented in a way that ensures compliance with relevant legislative requirements and standards of best practice.

Native Bush Spices Australia expects that staff will use the channels and for business purposes only and comply with all relevant policies and procedures, the Code of Conduct.

Communication channels

Native Bush Spices Australia has a number of internal communication channels available, including:

| **Channel** | **Purpose** |
| --- | --- |
| Meetings | If possible, interaction should take place face-to-face or via telephone. All information discussed should be summarised in an email. |
| Staff bulletin | This contains Information from the executive to staff which is important and relevant to their interests, including training, employment vacancies and important announcements.  Contributions for the Staff Bulletin must be approved in advance by the contributor’s relevant manager before being sent to the communications officer for review and inclusion. |
| Staff surveys | These are used to gather information and feedback from all staff members. Surveys should be sent to staff via email link. |
| Native Bush Spices Australia intranet | The intranet provides important information for staff in an easily accessible location.  The intranet is to be used for conveying information which is important and relevant from the executive team to staff. It is the responsibility of the person contributing the content to ensure the content is factually correct. All contributions must be approved in advance by the contributor’s relevant manager. |
| Enterprise social networks (e.g. Yammer, Facebook) | These may be used by groups of staff to collaborate and communicate on projects online (e.g. to share and comment on work-related ideas, news and activities). Personal use of these platforms may not be used during work hours. Use of these networks must comply with the Social Media Policy. |
| All Staff emails | Emails are used for messages to and between staff. Staff are required to read all their work-related emails. |
| Email distribution lists | Email distribution lists may only be used by the executive team and should adhere to the Privacy policy. |