



# Technology Acquisition: Project Management Software

December 2<sup>nd</sup>, 2020

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## Company Profile

The organization our group is working with is a large clothing and outdoor equipment retailer located in Freeport, Maine. This organization is an American company that has provided equipment and clothing to the northeast since 1912. The company's mission is to design products for families of all kinds to spend time outside together. It currently operates over 40 stores located in 20 different states around the country with a large majority of them being concentrated in the New England region, however recently there has also been a global expansion in Canada and Japan.

Our group is working with a staff member in the creative department whose role at the company is to communicate between the creative department and the IT department. The creative department of this company is responsible for its company's website, advertising, catalog, and photography. The department uses a large number of software systems due to the meta-data and important safe-keeping of the attribution of their files. One of the programs that the creative department uses is Adobe Creative Cloud, which is a collection of Adobe programs that are meant for designing, illustrating, photography, and video editing. Besides Adobe, e-commerce publishing tools, digital asset management systems are other tools used at the moment to help connect employees in different departments as well as outside vendors.

## Business Need

### 1. Context

This apparel company currently uses programs such as Adobe Creative Cloud and Microsoft Project to perform their work within the creative department. However, collaboration is being hindered due to the multitude of projects and incorporation of other departments. Thus, the company is looking for a project management software to increase their productivity and allow for further enhanced collaboration to best fit this company's needs.

### 2. Business Need

- A comprehensive and intuitive application that can help increase the productivity and workflow of different projects and collaborations between the different applications used
- Ability to view projects that employees are working on along with creating a overall timeline to track the status and development of projects
- The project management software must be integratable with various tools such as Microsoft 365, Adobe Suite, and offer security features

### 3. Supporting Facts

- Chris Jones will be the deciding factor on making sure the selected software performs at a successful level and fills the needs

### 4. Assumptions

- This company expects to spend money on a higher quality software so free applications must be thoroughly researched
- Due to the volume of project, we can assume that upon implementation of the software it will allow for interdepartmental work to be produced

### 5. Approvals

- Chris Jones- Sponsor
- Sindi Bendo- Team Leader
- Cindy Stevens – Professor

## Project Charter

### A. General Information

<b>Project Title:</b>	Creative Department Software System		
<b>Prepared by:</b>	Sindi Bendo, Ryan Ladestro, Mankaran Saggi, David Schwartz	<b>Tech Acquisition Team</b> 5	

### Points of Contact

<b>Position</b>	<b>Title/Name/Organization</b>	<b>E-mail</b>
<i>Project Sponsor</i>	Chris Jones	
<i>Project Manager</i>	Sindi Bendo	bendos@wit.edu
<i>Oversight</i>	Cindy Stevens	stevensc@wit.edu

### B. Executive Summary

This project will encompass helping a retail company find a new project management software system that will help integrate the different tools the creative department uses in order to increase efficiency, collaboration, and management of products across different programs. Currently, different softwares such as Excel, Project, and Adobe Creative Cloud are all used but a new system that could integrate Sharepoint and Adobe will solve the business need. This is crucial as when it comes to a creative department, the technology being used must be up to par in order to produce quality items.

### C. Project Purpose

#### 1. Business Need

The outdoor apparel company is looking for a more streamlined and efficient system such as documents being easily shared by finding a new software that can be integrated across the different programs used in the creative department.

## **2. Project Business Objectives**

<b><i>Commonwealth or Agency Strategic Plan – Initiative or Critical Issue</i></b>	<b><i>Project Business Objectives</i></b>
This retail company wants to enable more collaboration and be more organized	We will find 5 different project management software options and recommend the best one based on its cost, quality, security, training, and most important integration among systems. If necessary, we will expand options and outsource to different vendors.

## **D. Assumptions**

1. We assume that we will discover at least 5 different options.
2. We assume that our chosen software will create more opportunities for collaboration and inspire easier creativity when working on different platforms.
3. We assume that the program can be learned and trained in a timely manner.

## **E. Project Description, Scope, and Management Milestones**

### **1. Project Description**

Technology Acquisition Team 5 will find and compare 5 different project management options to find the best option for the retail company based on its cost, quality, security, training, and most important integration among systems. We will also use relevant decision-making tools such as a Decision Scoring Matrix to differentiate the options.

### **2. Stakeholder Requirements for Disaster Recovery**

In the event where our group finds options that are not feasible with the creative department, they will continue to use their current methods and systems. As a consulting group, we understand that our solution is only a recommendation and that the company may choose to not implement the decision.

### 3. Scope

Who is working on this project?

Sindi Bendo, Ryan Ladestro, Mankaran Saggi, David Schwartz

What is our technology acquisition project trying to accomplish?

To find our project sponsor Chris Jones an improved project management system that makes collaboration and organization of projects less time consuming.

Where are we going to look for project management software systems ?

We will research any current programs that we use at our individual jobs or any prior experience with using softwares. We will also conduct internet research for better options and see what vendors offer if necessary.

When will we present our findings?

The week of December 2nd, 2020

Why are we involved in this project?

To help the retail company continue to be successful and make sure the creative department can use their resources to the full potential

### 4. Summary of Major Management Milestones and Deliverables

<i>Event</i>	<i>Estimated Date</i>	<i>Estimated Duration</i>
<i>Project Charter Approved</i>	10/02/20	1 day
<i>Project Plan Completed</i>	10/07/20	1 day
<i>Project Plan Approved</i>	10/10/20	1 day
<i>Project Execution – Started</i>	10/15/20	~5 weeks
<i>Project Execution Completed</i>	12/02/20	1 days
<i>Project Closed Out</i>	12/09/2020	1 day

### 5. Measures of Success

<b>Objective 1:</b>	Collaboration and creativity abilities will be increased due to ability to work across different platforms
<b>Performance Goal:</b>	1. Decide on a solution as a group that fits the needs of the creative department
<b>Methodology:</b>	1. Research 5 different options

	2. Use a Decision Scoring Matrix for comparison
<b>Objective 2:</b>	Find a system that can easily be integrated and manages files in an organized fashion
<b>Performance Goal:</b>	1. Ensure that the software has organizational features and that departments can be categorized yet work together
<b>Methodology:</b>	1. Research 5 different options and find the one that offers a schedule/timeline feature as well as keeping files organized

## F. Project Authority

### 1. Authorization

Chris Jones

### 2. Project Manager

Sindi Bendo, also the team leader, will oversee the aspects of the project and ensure their completion in a timely manner.

### 3. Oversight

Professor Cindy Stevens

## G. Project Organization

### 1. Organization Description

Technology Acquisition Team 5 for an apparel company, composed of Sindi, Ryan, Manny, and David, are working to find a solution to help the creative department be able to collaborate effectively and have the projects be organized in a clearer manner.

### 3. Roles and Responsibilities

The project leader is Chris Jones, he will oversee the project and help guide the team towards the best solution. He will be the final decision maker in the selection processes. He will also be available to help with questions and offer input on the options.

Sindi Bendo is in charge of managing meeting times and sending out Zoom links as well as researching software options.

Ryan, Manny, and David will help create, manage, and upload the documents to the discussion board for class feedback and for any emails that are sent to the sponsor.



**D. Signatures**

<i>Position/Title</i>	<i>Signature/Printed Name/Title</i>	<i>Date</i>
<i>Project Sponsor (required)</i>	Chris Jones	
<i>Project Manager (required)</i>	Sindi Bendo	
<i>Oversight (required)</i>	Cindy Stevens	

**E. Major Milestone Dates**

October 2nd , 2020	Submit our Project Charter for approval.
October 7th, 2020	Complete our Project Plan for approval by Sponsor/Professor Stevens
October 10th, 2020	Start the Research Phase of the project (assuming plan approval).
October 20th, 2020	End the Research phase, start the Evaluations and Negotiations Phases of the project.
November 18th, 2020	End those phases, start the Operations and Implementations Phases.
December 9th, 2020	Submit our Final report to our Sponsor/Professor.

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# Project Schedule

## Project Schedule

Provide basic information about the project including: Project Title – The proper name used to identify this project; Project Working Title – The working name or acronym that will be used for the project; Proponent Secretary – The Secretary to whom the proponent agency is assigned or the Secretary that is sponsoring an enterprise project; Proponent Agency – The agency that will be responsible for the management of the project; Prepared by – The person(s) preparing this document; Date/Control Number – The date the plan is finalized and the change or configuration item control number assigned.

<b>Project Title:</b>	Creative Department Software System	<b>Project Working Title:</b>	Creative Department Software System
<b>Proponent Secretary:</b>	Sindi Bendo, Ryan Ladestro,	<b>Proponent Agency:</b>	Technology Acquisition Project
<b>Prepared by:</b>	Mankaran Saggi, David Schwartz	<b>Date / Control Number</b>	

Complete the columns below using information developed in the WBS, OBS, Activity and Sequencing Worksheet, and Resource Plan. Indent subordinate elements in the WBS element column. For example indent all tasks for an Activity and then indent the Sub-Task(s) for the Task. The schedule should address at least three levels of WBS elements. The schedule may be prepared using an automated scheduling tool like Microsoft Project. If an automated tool is used, format the data entry table to include all of the data elements in the table below.

Element Number	WBS Elements Activity, Task, or Sub-Task	Estimated Duration (Hours or Days)	Start Date	Finish Date	Resources Required	Task Predecessor Element Number
1.0	<b>Initiation Phase</b>					
1.1	Group Contract	1 day	10/1/2020	10/2/2020		
1.1	Business Need Due	1 day	10/1/2020	10/2/2020		
1.2	Company Profile Due	1 day	10/1/2020	10/2/2020		
1.3	Project Charter Due	1 week	10/1/2020	10/8/2020	Project Charter Session with Sponsor	
2.0	<b>Planning Phase</b>					
2.1	Compile a list of 5 software options that fit the needs of the creative department	2 weeks	10/2/2020	10/16/20		
2.2	Present findings to sponsor during meeting	1 day	10/7/2020	10/8/2020		

2.3	Create comparison chart with top 4 options divided into categories	1 week	10/8/2020	10/15/2020		
2.4	Present chart to sponsor and pick a final software option	1 day	10/22/2020	10/23/2020		
2.5	Present planning documents to sponsor	1 day	10/22/2020	10/23/2020		
2.6	Present final chart to sponsor to decide on an option	1 day	11/5/2020	11/6/2020		
3.0	<b>Research Phase</b>					
3.1	Present RFP document to sponsor	1 day	11/5/2020	11/6/2020		
4.0	<b>Evaluation Phase</b>					
4.1	Scenario Planning	7 days	11/6/2020	11/13/2020		
5.0	<b>Negotiation Phase</b>					
5.1	Deal Sheet	7 days	11/13/2020	11/20/2020		
5.2	Negotiation Strategy Sheet	10 days	11/13/2020	11/23/2020		
6.0	<b>Implementation Phase</b>					
6.1	Short Write-Up	7 days	11/16/2020	11/23/2020		
7.0	<b>Operations Phase</b>					
7.1	Short Write-Up	7 days	11/23/2020	11/30/2020		
8.0	<b>Project Presentation</b>					
8.1	Practice and prepare final report	2 days	11/30/30	12/2/2020		
8.2	Presentation Day	1 day	12/2/2020	12/2/2020		
9.0	<b>Project Close-Out</b>					
9.1	Submit Final Report	1 day	12/9/2020	12/9/2020		

## Risk Matrix

Likelihood		IMPACT				
		Failure to find a compatible software that fits business needs	Too little options to choose from	Software customization delays execution phase	Vendor offers a high price to purchase the software	Implementation of software fails
		Very Low	Low	Medium	High	Very High
	Almost Certain	Low	Medium	Very High	Very High	Very High
	Likely	Low	Medium	Medium	Very High	Very High
	Possible	Low	Medium	Medium	Very High	Very High
	Unlikely	Low	Low	Medium	Medium	Medium
	Rare	Low	Low	Low	Low	Medium

## Communication Matrix

	Sindi	David	Manny	Ryan	Professor Stevens	Chris
Project Charter	A	A	A	A	A	A
Business Need, Company Profile, Group Contract	A	A	A	A	R	R
Changes	I	I	I	I	A	R
Meeting Notes	I	I	I	I	I	I
Submission to Discussion Board	A	R	R	R	R	R
Schedule Review	A	A	A	A	R	R
Execution Review	I	I	I	I	A	A

A= Approval Required  
 R= Review and comment  
 I=For information only

## Decision Scoring Matrix

			Options			
			Microsoft Project	Monday	Wrike	Workfront
Category	Attribute	Weight	Score			
Cost	Installation	4	3	2	3	2
	Maintenance		3	2	3	3
Integration	Feature Set		2	2	3	3
	Resource Availability	3	2	1	3	3
	Team Familiarity		2	2	3	2
Security & Support	Ease of Cross-Platform Work		3	3	3	3
	Training	2	2	2	3	3
	Customer Service		2	2	3	3
	Overall Project Security		2	2	3	3
Features & Customization	Project Roadmaps	1	2	1	3	3
	Team Collaboration		1	2	3	3
	Inter-Departmental Work		1	2	3	3
Total			25	23	36	34
Weighted Scores			69	59	90	83

Scale:	
1	Poor
2	Adequate
3	Excellent



# **Technology Acquisition Team 5**

## **Request for Proposal Project Management Software**

Prepared By: Sindi Bendo, Ryan Ladestro, Mankaran Saggi, David Schwartz  
Date: November 4th, 2020



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## EXECUTIVE SUMMARY

A large clothing and outdoor equipment retailer located in Freeport, Maine with stores across the United States and in some other countries is looking for a management software system that will help integrate the different tools the creative department uses in order to increase efficiency, collaboration, and management of products across different programs. Currently, different softwares are used but a new system that could integrate Sharepoint and Adobe will solve the business need. This is crucial as when it comes to a creative department, the technology being used must be up to par in order to produce quality items.

## BACKGROUND INFORMATION

- The company is looking for a more streamlined and efficient system such as documents being easily shared by finding a new software that can be integrated across the different programs used in the creative department
- Currently, different softwares such as Excel, Project, and Adobe Creative Cloud are all used but a new system that could integrate Sharepoint and Adobe will solve the company's issue
- Within the creative department, it is important to find a software that can connect all creative components used in order to foster team communication and product development which is our overall goal



## SCOPE OF WORK

This project consists of a full software implementation and usage of the chosen project management software that will be used within the creative department and other necessary employees.

### PROJECT OVERVIEW

- To increase collaboration and creativity abilities due to ability to work across different platforms
- Find a project management system that can easily be integrated and manages files in an organized fashion
- Recommend the best one based on its cost, quality, security, training, and most important integration among systems. If necessary, we will expand options and outsource to different vendors

### PROJECT STRUCTURE

This project has been structured so that a team of students can work with the sponsor in order to satisfy their business needs and research software systems that are integrable with the creative department. This work is then reviewed by a sponsor who works at the company and is heavily involved in the entire process of working with the consultants in order to ensure a smooth integration of the system to the employees in the company and provides feedback in order to guide the team towards a successful project execution.

### PROJECT REQUIREMENTS

- Integration with Sharepoint and Adobe Creative Cloud Products
  - The project management software must be integrable with various tools such as Microsoft 365, offer security features, as well as tools that allow employees to creatively design a product
  - Customization features as best fit the needs
  - Ability to create and edit a timeline or schedule where edits and comments are visible to all
- Users
  - As this software will be used by at least department 100 employees, the software must be able to manage high traffic volume
  - Collaboration is key to choosing the best fit software as the creative department deals with designing, illustrating, photography, and video editing of the company's products
  - As collaboration occurs, those who are working on a project will be able to see real-time edits and receive notice of this

## RFP REQUIREMENTS PROCESS

*Potential Vendors* willing to participate should confirm to Group 5 within **7** days of receiving the RFP their **Intent to Respond**.

Failure to confirm will signify that a *vendor* is not participating in the RFP

All *vendors* confirming their participation should send the Intent to Respond to the attention of:

**bendos@wit.edu**

## RFP SCHEDULE

<b>November 4th, 2020</b>	RFP made available to vendors
<b>November 12th, 2020</b>	Response to vendors for further clarifications or questions
<b>November 19th, 2020</b>	Deadline for receiving all materials in regards to the bid
<b>November 25th, 2020</b>	Bids to be evaluated. If necessary, presentations will occur after Thanksgiving break
<b>December 2nd, 2020</b>	Negotiation and Conclusion of Contract
<b>TBD</b>	Clarification Period: The chosen vendor will obtain any necessary information from the sponsor about technological and business needs in order to streamflow implementation in the creative department

## RFP RELATED QUESTIONS / CLARIFICATIONS / SUBMISSION

All questions related to this RFP should be directed to:  
Sindi Bendo, bendos@wit.edu

### Proposal Evaluation Criteria

In order to meet technological and business requirements, the chosen solution must meet the following criteria:

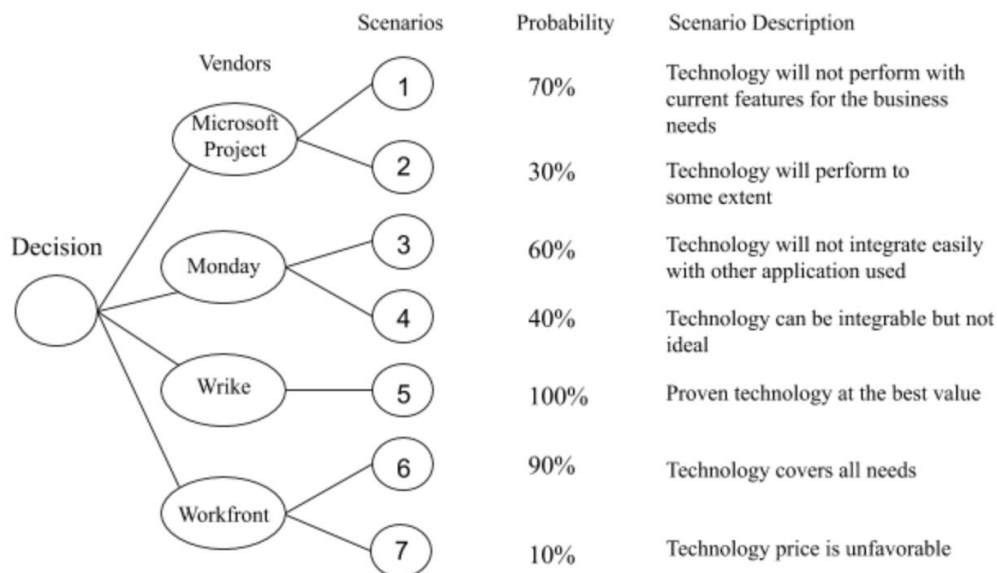
Category	Need	Response
<b>Cost</b>	Installation	
	Maintenance	
	Feature Set	
<b>Security &amp; Support</b>	Training	
	Customer Service	
	Overall Project Security	
<b>Integration</b>	Resource Availability	
	Team Familiarity	
	Ease of Cross-Platform Work	
<b>Features and Customization</b>	Project Roadmaps	
	Team Collaboration	
	Inter-Departmental Work	

### Requirements For Response

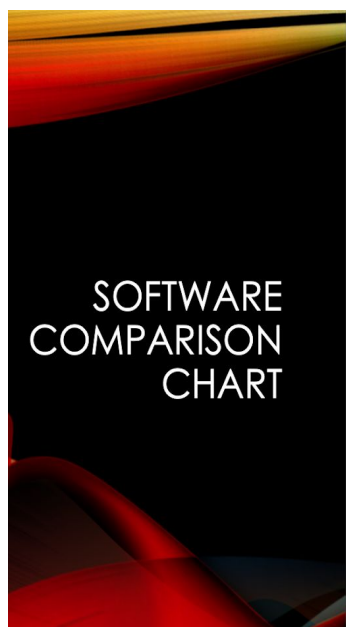
For each requirement, the solutions capability should be identified as follows:

<b>NA – Not Available</b>	
<b>MJ – Major Modification</b>	This response will require an explanation specifying the amount of effort required for the work to be done.
<b>MN – Minor Modification</b>	This involves simple customizations and should be demonstrable.
<b>FR – Future Release</b>	The requirement will be addressed in a future release of the product. Scheduled release dates must be stated in the response.
<b>CR – Current Release</b>	
<b>TP – Third-Party Solution</b>	The requirement is not offered by your company, yet can be integrated by using a third-party product, the vendor is required in the response.

## Scenario Model



## Comparison Chart



Microsoft Project Online	Security: Microsoft Onedrive, 2FA, Account recovery	Cost: \$10 - \$55 a month per user depending on tier
	Integration: Office suite, Adobe cloud applications	Project Plan 1: \$10 per Month
	Training: Video tutorials online, training courses, guides	Project Plan 3: \$30 Per Month
	Client and Cloud based (Client version \$55 a month)	Project Plan 5: \$55 per Month
Monday	Security: Cloud Backups, SSO, 24/7 Support	Cost: \$24-48 (*)
	Integration: Microsoft Suite and 70+ integrations offered	Basic: Starts at \$24 a month: \$8 per user - three users min.
	No ability to proof items but offers time tracking	Standard: Starts at \$29 a month: \$10 per user-three users min.
	Training: Video tutorials, Webinars, One-on-One Bootcamp	Pro: Starts at \$48 a month: \$16 per user - three users min.
Wrike	Security: Continuous backups, regular updates, encryptions, 2FA	Cost: Basic: \$10-25
	Integration: Over 400 different integrations; Adobe, Google, Jira...	Professional: 5-15 Users: \$9.80 user/month
	Ability to mark up and review documents	Business: 5-200 Users: \$24.80 user/month
	Training: Webinars, Blogs, Guides, Case Studies, Videos	Enterprise: 5-Unlimited: contact needed
Workfront	Security: Program that offers SSO, Encryptions etc.	Cost: 4 different plans with no set amount of users
	Integration: Adobe, G-Suite, Microsoft Apps, Jira & more	Enterprise plan- Entire enterprise \$10 user/month
	Proofing software available to mark up documents	Pro Plan: For 1 department- \$18-24 user/month
	Training: Bootcamp, Custom, Webinars, Videos & Guides	Team Plan: A single team- \$30 user/month

## Negotiation Strategy

### 1. Summary

- a. This project team has selected Wrike as the main vendor to fill the project management software requirements, however, the project team also found Monday, Microsoft Project and Workfront to be credible competition that could be useful in negotiations. The team believes that all four of these softwares could be able to achieve the goals of the company, however Wrike being the main vendor target upon further evaluation.

### 2. Initial Terms

- a. The initial terms for each vendor pricing points are listed below:

		<b>Microsoft Project</b>	<b>Monday</b>	<b>Wrike</b>	<b>Workfront</b>
<b>Initial Costs:</b>					
		\$10, \$30, \$55	\$24, \$29, \$48	\$24.80	\$10, \$24, \$30
	Software	(annual)	\$9,600-\$19,200	\$30,000	\$3,000-5,000
	Training Costs	\$0	\$0	\$17,000	\$0
<b>Ongoing Costs:</b>					
	Annual Support Cost (mark-up tool)	\$0	\$0	\$3,980	\$5,000
<b>Totals:</b>		\$6,250	\$19,200	\$34,000	\$10,000

### 3. Agendas

- a. Our Company's Agenda:
  - i. Determine best financial package for software capable of supporting 100+ users in the creative department that satisfies all needs
- b. Vendors' Agenda:
  - i. Maximize potential revenue

- ii. Utilize our company's brand name for future marketing and gain a client

#### 4. **Leverage**

- a. Our Company's Leverage:
  - i. Name recognition
  - ii. Information on competition
  - iii. Ability to walk away from potential deals
  - iv. Knowledgeable of other project management software vendors
- b. Vendors' Leverage:
  - i. Time
  - ii. Aware of features and implementation

#### 5. **Objectives**

- a. Negotiate and make a final selection on the best option out of the four vendors in terms of cost and fulfilling all company business needs.

#### 6. **Strategy**

- a. Prioritize the importance of creative tools integration.
  - i. Some vendors lack certain tools that fit the technological needs
- b. Financial package is the deciding factor between the final two vendors
  - i. The vendor with the lowest deal will be the chosen software

#### 7. **Potential Tactics**

- a. Put constraints such as time on all bids in hopes to drive the prices down
- b. Use deals from three of the other vendors to lower Wrike's offer or to include other incentives such as additional features and support

#### 8. **Negotiation Team and Roles**

- a. Allow Chris Jones and his team at his company to decide on the best software
- b. Business Lead (Sindi): Communicated business aspect and why the company needs a solution
- c. Technical Leads (David, Ryan, Manny): Researched the technical capabilities of each vendor

### Deal Sheet

#	Terms	Initial	Minimum	Goal
1	Software (Wrike)	\$	\$50,000	\$35,000
2	Annual Support Costs	\$0 (Included)	\$0 (Included)	\$0 (Included)
3	Training Costs	\$0 (Included)	\$22,000	\$21,305
4	Implementation Date	10-Jan-21	1-Feb-21	1-Jan-21

## Implementation Phase Write-Up

For implementation, Wrike offers monthly plans dependent on the type of organization and features needed for the client thus ensuring a smooth process for implementation in the company. Due to the number of current programs that are used, Wrike will be able to integrate easily and work simultaneously with the other systems. During the research phase, the team knew how important integrability was for our client and we factored this into our decision-making process and when looking at the different costs among vendors. Wrike offers a plan that is priced at the right amount and satisfies the budget limit. A concern that might arise is the accumulation of monthly payments however though it may be tedious it offers the company an exit strategy at any point if they are dissatisfied with the service provided. Luckily, since the company we are working for does not currently have a project management system for all of its software in place, then this allows for immediate implementation to occur as soon as the contract is signed. Wrike offers extensions and capabilities that will help cross-platform work be conducted and make it easier for users who use different systems to perform their work.

### Implementation Process Checklist:

- The gaps between the company's requirements and the Wrike's base product have been clearly defined, designed, and prioritized.
- Wrike has developed the functionality to close the gaps and the IT group has thoroughly system tested the product.
- End users have been trained appropriately as well as tested and accepted the product.
- The product has been deployed.


## Operation Phase Write-Up

### Fixes and Enhancements:

When it comes to the logistics of the operation of deciding on Wrike for our company, we know that the software will be paid every month per user. This allows for operations to be controlled monthly and for there to be leeway when it comes to trial periods on new features for users. When it comes to new features, Wrike offers users an interactive platform called Wrike Labs which is an experimental way for new features to be added to one's workspace. This could be beneficial to the creative department as there may be new tools that are needed with the workflow that have not been fully released yet. This allows the company to have a connection with the vendor for any fixes or enhancements that must be added to the software along the way.

### Support:

The operations phase being split up monthly periodically allows for further analysis to make improvements to the system so that our client is satisfied. Though it may be difficult to see



a collaboration increase in the first couple of months, by checking on the levels of productivity monthly then we can make benchmarks for where we expect results to be. However, as the software continues to be used at the company, then we will be able to gain insight involving our four categories: Security, Support, Integration, and Customization. Finally, a smooth integration isn't possible unless we know that our client has a support system to go to for troubleshooting or when running into issues. Wrike offers interactive training sessions, a help center, and a community forum that has weekly postings about updates and new features which are all on top of their phone and email support.

**Operations and Project Closure Checklist:**

- All procedures regarding system fixes and support have been addressed and documented thus are activated and in place.
- The vendor, Wrike, is on board with any processes and customer service necessary resulting in support groups being in place.
- End-users have been informed on the support process and trained on accessing any material needed.
- All project documentation including lessons learned has been formatted into an online PDF as well as a project notebook.
- The project has been officially closed.
- The team will celebrate success of this project closure



## Team Meeting Agendas & Minutes

Team Meeting 1 with Chris Jones

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**Date:** September 17th, 2020   **Time:** 1:00 pm   **Location:** Zoom

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### Meeting Goals

- A. Form an understanding of the company's needs and how the group will contribute to meet that need

Time	Topic / Discussion Item
1:00 pm	<b>Welcome</b> <ul style="list-style-type: none"> <li>Review Agenda</li> </ul>
10 min	<b>Introductions</b> <ul style="list-style-type: none"> <li>Each student will introduce themselves and provide information about their background</li> <li>Introduction of Chris Jones and background info about his role in the company</li> </ul>
1:10 pm 10 min	<b>Informative Agenda Item #1</b> <ul style="list-style-type: none"> <li>Topic 1: Discuss the company and company's technological/business needs</li> </ul>
1:20 pm 10 min	<b>Wrap Up All</b> <ul style="list-style-type: none"> <li>Summarize Outcomes</li> <li>Next Steps: Decide on date/time that works best with Chris for meetings</li> <li>Add Chris to group workspace for team communications</li> </ul>
1:30 pm	<b>Adjourn</b>

### Meeting Minutes

1. **Introductions:** All members introduced themselves (Name, major, location, relevant experience and types of project management software used)
2. **Chris Jones-** Creative Systems Lead
  - a. Background in IT, liaison between the creative department and IT department
3. **Background:** Creative department is responsible for website, catalog, photography, TV Ads
  - a. In charge of all the systems and tools that department uses
  - b. **Adobe Creative Cloud**, E-Commerce publishing tools, Digital Asset Manage Systems
  - c. In charge of meta-data and attribution of all the files
4. **Business Need:** Focus on organization of projects that department manages
  - a. Have a system/tool that would allow for that **collaboration**
  - b. Share/Review that content
  - c. Follow the progress through completion
  - d. Tools that are still relevant/ or new tools or databases
  - e. Currently use Excel (very time consuming), currently not using Microsoft Project (not feasible due to not being available on Mac's)
  - f. Excel, Project, and Adobe Creative Cloud are all used but a new system would be nice to use to integrate Sharepoint and Adobe
5. **Requirements:**
  - a. When communicating with vendors say you're working with a retailer
  - b. Training
    - i. Live Virtual
    - ii. Training Webinars
  - c. Security
    - i. Single Sign on/Existing Microsoft Account
  - d. Integration
    - i. Integration with Sharepoint and Photoshop
    - ii. Tools with API
6. **Next Steps:**
  - a. Create a google doc where team members will find project management solutions and make at chart of strengths and weaknesses (abilities/limitations) for each solution
    - i. If no feasible solution is found then search for vendors/companies to expand options
  - b. Set up next meeting in two weeks where updates will be given
    - i. Will email if any questions
    - ii. Sindi will set up the next Zoom meeting

## Team Meeting 2 with Chris Jones

**Date:** October 8th, 2020   **Time:** 2:00 pm   **Location:** Zoom

### Meeting Goals

- A. Present our project documents
- B. Present our group's findings to Chris and decide on an option or if further research is needed

Time	Topic / Discussion Item
2:00 pm	<b>Welcome</b> <ul style="list-style-type: none"> <li>Review Agenda</li> </ul>
10 min	<b>Business Charter and Business Need</b> <ul style="list-style-type: none"> <li>Sindi will present the business charter and need documents and Chris will comment on any changes or improvements</li> </ul>
2:10 pm 20 min	<b>Informative Agenda Item #1</b> <ul style="list-style-type: none"> <li>Topic 1: Each student will present the project management software that they researched and go over the pros/cons of each one</li> </ul>
2:30 pm 5 min	<b>Wrap Up All</b> <ul style="list-style-type: none"> <li>Summarize Outcomes</li> <li>Talk about next steps</li> </ul>
2:35 pm	<b>Adjourn</b>

### **Meeting Minutes**

#### **1. Document Review**

- a. Sindi presented the project charter and business need documents, both which Chris approved of. All business needs were covered and explained but Chris gave tips and adjustments to define them.
- b. The group presented the company profile which upon review we are going to add that the company has many international stores in some countries

#### **2. Software Options**

- a. Manny went over Odoo – concern was that it is not focused on project management
- b. Ryan went over Project Online- Chris had a high interest in this software
- c. Manny went over Wrike
- d. Sindi went over Workfront
- e. David went over Monday.com
- f. Group decided to work Monday, Wrike, Workfront – Chris is curious about Project Online, might want it to be included, do more research for next meeting
- g. The group is considering whether to make comparison chart between all the software's

#### **3. Wrap-Up**

- a. David asking questions related to what requirements Chris would like in a software

Next steps:

1. Create a comparison chart for the 4 options decided on to further analyze the softwares and to help make a decision
2. Start working on planning documents to make sure they're ready to present for our next meeting with Chris

### Team Meeting 3 with Chris Jones

**Date:** October 23nd, 2020 **Time:** 10:00 am **Location:** Zoom

#### Meeting Goals

- A. Present our project planning documents
- B. Present our software comparison chart to Chris and decide on an option or if further research is needed

Time	Topic / Discussion Item
10:00 am	<b>Welcome</b> <ul style="list-style-type: none"> <li>Review Agenda</li> </ul>
10 min	<b>Planning Documents</b> <ul style="list-style-type: none"> <li>Sindi will present the planning documents and Chris will comment on any changes or improvements</li> </ul>
10:10 am 20 min	<b>Informative Agenda Item #1</b> <ul style="list-style-type: none"> <li>Topic 1: Each student will present the project management software that they researched and go over the pros/cons of each one and as a group we will suggest our final decision</li> </ul>
10:30 am 5 min	<b>Wrap Up All</b> <ul style="list-style-type: none"> <li>Summarize Outcomes</li> <li>Talk about next steps</li> </ul>
2:35 am	<b>Adjourn</b>

#### Meeting Minutes

##### 1. Software Options

- a. The group presented our software comparison start
  - i. Changes for next meeting: cost per user, and total per month/year, also show the different tiers for each service
- b. **Document Review**
  - i. Find out if any of the integrations other than Wrike would have the ability to mark up/review documents, update chart to show which services have the mark up integration
- c. **Presented communication, risk matrix, schedule, log-** all look good!

### Team Meeting 4 with Chris Jones

**Date:** November 5th, 2020 **Time:** 2:15 pm **Location:** Zoom

#### Meeting Goals

- A. Present our revised comparison chart and decision scoring matrix
- B. Present the Request for Proposal form

Time	Topic / Discussion Item
2:15 pm	<b>Welcome</b> <ul style="list-style-type: none"> <li>Review Agenda</li> </ul>
10 min	<b>Planning Documents</b> <ul style="list-style-type: none"> <li>Present the revised comparison chart along with a cost chart</li> <li>Present the revised decision scoring matrix</li> </ul>
2:25 pm 20 min	<b>Informative Agenda Item #1</b> <ul style="list-style-type: none"> <li>Present the Request for Proposal Form</li> </ul>
2:45 pm 5 min	<b>Wrap Up All</b> <ul style="list-style-type: none"> <li>Summarize Outcomes</li> <li>Talk about next steps</li> </ul>
2:50 pm	<b>Adjourn</b>

#### Meeting Minutes

##### 1. Document Review

- a. Software Comparison Chart and costs
- b. Decision Matrix and why we chose Wrike
- c. Present RFP - Chris would like an email of the RFP - wants everything to be emailed to him for further review

##### 2. Questions

- a. Regarding the Negotiation Strategy sheet
  - i. Chris gave advice on settling for prices, negotiations can cause a lot of money to be knocked off
- b. Deal Sheet- asked Chris about having actual values or just leaving it blank
  - i. Put an estimate for costs based on 100 users - Chris spoke with Wrike a couple years ago and it was 35/month for users on a custom plan.
  - ii. Does the mark up tool cost extra per user?