


Appendix A

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Resource Usage Report

Report 1 as of Wed 10/28/09
CRM, Logistics and Compliance Management WBS

ID		Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1		Jon Luzader	Work		PM	1	100%	\$90.00/hr	\$135.00/hr	\$0.00	Pro rate d	Standard
2		Grant Michael	Work		SS	1	100%	\$60.00/hr	\$90.00/hr	\$0.00	Pro rate d	Standard
3		Noah Halpert	Work		BS	1	100%	\$60.00/hr	\$90.00/hr	\$0.00	Pro rate d	Standard
4		Nick Hernoane	Work		TS	1	100%	\$60.00/hr	\$90.00/hr	\$0.00	Pro rate d	Standard
5		Dave Capan	Work		NS	1	100%	\$60.00/hr	\$90.00/hr	\$0.00	Pro rate d	Standard
6		Network Tester	Work		NT	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
7		Network Installation Specialist	Work		NIS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
8		Network Security Specialist	Work		NS S	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
9		Business Analyst	Work		BA	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
10		Research Assistant	Work		RA	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
11		Financial Analyst	Work		FA	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
12		Technical Installation Specialist	Work		TIS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
13		Hardware Specialist	Work		HS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
14		Wireless Implementation Specialist	Work		WIS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
15		Database Programmer	Work		DP	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
16		ERP Integration Specialist	Work		ERPIS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard
17		SaaS Systems Specialist	Work		SSS	2	100%	\$35.00/hr	\$52.50/hr	\$0.00	Pro rate d	Standard

Cost Estimate

1	CRM, Logistics and Compliance Management Cost Estimate					
2	Prepared by: Grant Michael	Date: 27-Oct-09				
3						
4						
5		# Units/Hrs.	Cost/Unit/Hr.	Subtotals	WBS Level 1 Totals	% of Total
6	WBS Items					
7	1. Project Management				\$195,670	29%
8	1.1 Project manager	489	\$90	\$44,010		
9	1.2 Project team members	1996	\$60	\$119,760		
10	1.3 Subcontracted team members	796	\$35	\$27,860		
11	Contractors (10% of software development and testing)			\$4,040		
12	2. Hardware				\$245,710	37%
13	2.1 Handheld Warehouse Devices	200	\$1,000	\$200,000		
14	2.2 Handheld Mobile Devices	25	\$200	\$5,000		
15	2.3 Servers	19	\$990	\$18,810		
16	2.5 Wireless Access Points	75	\$200	\$15,000		
17	2.6 Switches	15	\$460	\$6,900		
18	3. Software				\$15,745	2%
19	3.1 Licensed CRM Software	23	\$65	\$1,495		
20	3.2 Licensed Server Software	19	750	\$14,250		
21	3.3 Licensed Mobile Device Software	25	20	\$500		
22	4. Testing (10% of total hardware and software costs)			\$26,146	\$26,146	4%
23	5. Training and Support				\$75,500	11%
24	5.1 Trainee cost	50	\$500	\$25,000		
25	5.2 Travel cost	35	\$500	\$17,500		
26	5.3 Project team members	100	\$330	\$33,000		
27	6. Reserves (20% of total estimate)			\$111,754	\$111,754	17%
28	Total project cost estimate				\$670,524	
29						
30						

Cash Flow – Page 1

Cash Flows of Wed 10/28/09
CRM, Logistics and Compliance Management WBS

	September	October	November	December	January	February	March	April
Initiating								
Select a Project Manager	\$2,640.00							
Jon Luzader	\$720.00							
Grant Michael	\$480.00							
Noah Halperl	\$480.00							
Nick Hercane	\$480.00							
Dave Caplan	\$480.00							
Kickoff Meeting	\$660.00							
Jon Luzader	\$180.00							
Grant Michael	\$120.00							
Noah Halperl	\$120.00							
Nick Hercane	\$120.00							
Dave Caplan	\$120.00							
Identify Key Stakeholders	\$960.00							
Noah Halperl	\$480.00							
Nick Hercane	\$480.00							
Develop Project Charter	\$7,520.00							
Jon Luzader	\$2,160.00							
Grant Michael	\$1,440.00							
Noah Halperl	\$1,440.00							
Nick Hercane	\$1,440.00							
Dave Caplan	\$1,440.00							
Initiating Complete								
Planning								
Develop Scope Statement	\$15,840.00							
Jon Luzader	\$4,320.00							
Grant Michael	\$2,880.00							
Noah Halperl	\$2,880.00							
Nick Hercane	\$2,880.00							
Dave Caplan	\$2,880.00							
Create WBS	\$28,380.00	\$24,420.00						
Jon Luzader	\$7,740.00	\$6,660.00						
Grant Michael	\$5,160.00	\$4,440.00						
Noah Halperl	\$5,160.00	\$4,440.00						
Nick Hercane	\$5,160.00	\$4,440.00						
Dave Caplan	\$5,160.00	\$4,440.00						
Develop Project Plans		\$19,800.00						
Jon Luzader		\$5,400.00						
Grant Michael		\$3,600.00						
Noah Halperl		\$3,600.00						
Nick Hercane		\$3,600.00						
Dave Caplan		\$3,600.00						
Review Project Plans								
Project Plans Approved								
Research CRM applications								
Run tests on current system to determine requirements		\$2,280.00						
Grant Michael		\$1,440.00						
Network Tester		\$840.00						
Explore possible CRM applications with Forecasting, Territory, and Channel Management features		\$1,440.00						
Noah Halperl		\$720.00						
Dave Caplan		\$720.00						
Research CRM application possibilities for analytical capabilities and reporting functionalities		\$5,000.00						
Jon Luzader		\$3,600.00						
Business Analyst		\$1,400.00						
Analyze test results		\$560.00	\$10,640.00					
Jon Luzader		\$180.00	\$3,420.00					
Noah Halperl		\$120.00	\$2,280.00					
Dave Caplan		\$120.00	\$2,280.00					
Network Tester		\$70.00	\$1,330.00					
Business Analyst		\$70.00	\$1,330.00					
Determine best CRM software application								
Research Mobile VPN Hardware and Software								
Analyze and test different hardware (mobile devices)		\$2,800.00						
Hardware Specialist		\$1,400.00						

Cash Flow – Page 2

Cash Flow as of Wed 10/28/09
CRM, Logistics and Compliance Management WBS

	September	October	November	December	January	February	March	April
Wireless Implementation Specialist		\$1,400.00						
Determine best mobile device								
Analyze and test different software applications for mobile devices		\$240.00	\$4,560.00					
Grani Michael		\$120.00	\$2,280.00					
Nick Herrcane		\$120.00	\$2,280.00					
Determine necessary software applications needed								
Complete Planning Phase								
Executing								
Develop Project Website								
Develop User Interface			\$1,733.33					
Grani Michael			\$800.00					
Research Assistant			\$466.67					
Database Programmer			\$466.67					
Upload Updated Documents			\$120.00					
Dave Capan			\$120.00					
Finalize Project Website								
Acquire CRM system licenses								
Attain CRM licenses			\$720.00					
Jon Luzzader			\$720.00					
Acquire Mobile Field Devices								
Set Up Mobile Field Devices for Use			\$560.00					
Technical Installation Specialist			\$280.00					
Wireless Implementation Specialist			\$280.00					
Complete Mobile Field Device Set Up								
Acquire Network Materials								
Acquire Network Hardware			\$280.00					
Network Installation Specialist			\$280.00					
Acquire Network Software			\$280.00					
Network Security Specialist			\$280.00					
Acquire Mobile Warehouse Devices			\$480.00					
Dave Capan			\$480.00					
Attain Network Materials								
Test CRM system compliance with SOA standards								
Ensure CRM system security, operation inside firewall, no external access			\$3,800.00					
Dave Capan			\$2,400.00					
Network Security Specialist			\$1,400.00					
Test firewall, attempt to hack CRM system from an outside source			\$840.00					
Network Tester			\$840.00					
Finalize SOA standard testing								
Integrate CRM with Microsoft Outlook								
Evaluate issues with CRM protocols and Microsoft Exchange/Outlook			\$825.00					
Grani Michael			\$300.00					
Database Programmer			\$175.00					
ERP Integration Specialist			\$175.00					
SaaS Systems Specialist			\$175.00					
Test CRM system with Microsoft Outlook			\$840.00					
ERP Integration Specialist			\$840.00					
Back-up contact records from Microsoft Outlook/Exchange			\$280.00					
Database Programmer			\$280.00					
Import contact records into new CRM system			\$420.00	\$420.00				
Database Programmer			\$210.00	\$210.00				
ERP Integration Specialist			\$210.00	\$210.00				
Conclude Microsoft Outlook implementation								
Test CRM applications for mobile and enterprise systems compliance								
Certify desirable features			\$1,520.00					
Grani Michael			\$960.00					
ERP Integration Specialist			\$560.00					
Complete mobile and enterprise compliance testing								
Set up electronic transaction software system within company Intranet								
Test system using current transaction data			\$1,120.00					
Network Tester			\$560.00					
Financial Analyst			\$560.00					

Cash Flow – Page 3

Cash Flow as of Wed 10/28/09
 CRM, Logistics and Compliance Management WBS

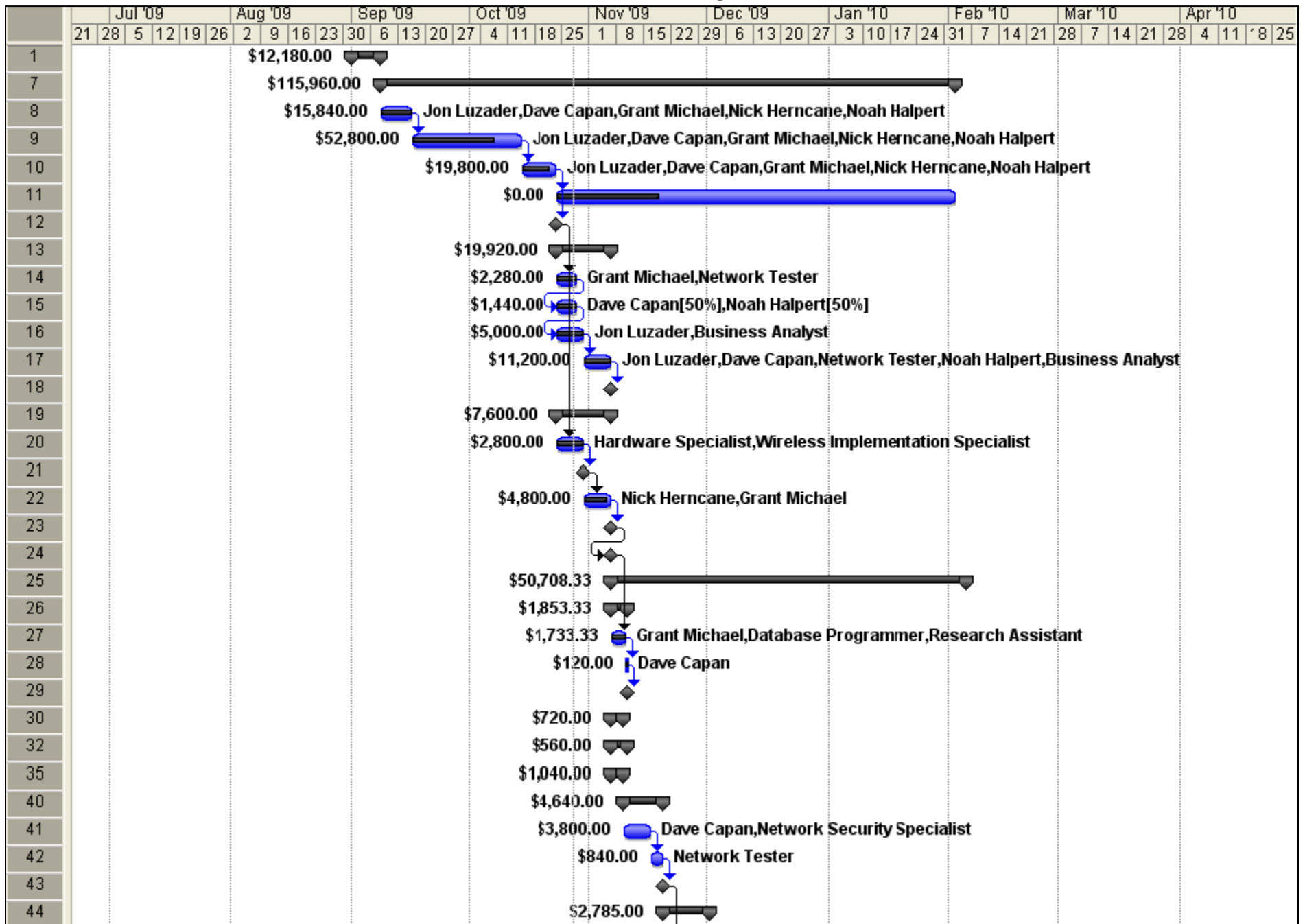
	September	October	November	December	January	February	March	April
Complete electronic transaction software implementation								
Install Network Materials								
Install Servers			\$1,400.00					
Hardware Specialist			\$1,400.00					
Install Server Operating Systems			\$1,440.00					
Grant Michael			\$1,440.00					
Install Wireless Access Points			\$840.00					
Wireless Implementation Specialist			\$840.00					
Finalize Network Installation								
Test CRM System Integration with Wireless Reporting Tools								
Test all handheld devices for compliance with logistics system			\$840.00					
Wireless Implementation Specialist			\$420.00					
ERP Integration Specialist			\$420.00					
Test product distribution tracking features			\$350.00	\$1,050.00				
Network Tester			\$350.00	\$1,050.00				
Integrate Wireless Reporting Warehouse Tools				\$1,400.00				
Wireless Implementation Specialist				\$1,400.00				
Finalize wireless reporting tools testing								
Test automated fulfillment process								
Stress system with orders				\$1,520.00				
Grant Michael				\$960.00				
Network Tester				\$560.00				
Ensure accuracy and efficiency of system before implementation				\$4,800.00				
Jon Luzader				\$2,880.00				
Dave Caplan				\$1,920.00				
Finalize Automated Fulfillment Testing								
Setup dashboards for inventory and shipment status								
Design inventory dashboard system with automatic shipment updates			\$1,295.00	\$665.00				
Grant Michael			\$390.00	\$210.00				
Noah Halperl			\$390.00	\$210.00				
Database Programmer			\$227.50	\$122.50				
SaaS Systems Specialist			\$227.50	\$122.50				
Finalize dashboard design								
Ensure warehouse management functionality								
Test individual warehouses for implementation and compliance issues				\$1,900.00				
Nick Herrcane				\$1,200.00				
Technical Installation Specialist				\$700.00				
Conclude warehouse management testing								
Test metrics reporting								
Test New Software Compliance with SAP Business Objects				\$560.00				
SaaS Systems Specialist				\$560.00				
Confirm any given set of metrics can be implemented								
Implement Transaction Information metrics				\$560.00				
Financial Analyst				\$560.00				
Implement Customer Information metrics				\$560.00				
Business Analyst				\$560.00				
Implement Profit and Loss metrics				\$1,520.00				
Noah Halperl				\$960.00				
Financial Analyst				\$560.00				
Ensure software applications can meet demands of providing daily metrics				\$1,200.00				
Jon Luzader				\$720.00				
Grant Michael				\$480.00				
Ensure software applications are able to provide month-end metrics				\$1,200.00				
Jon Luzader				\$720.00				
Grant Michael				\$480.00				
Complete metrics reporting testing								
Finalize all CRM testing								
Provide business metrics for EU compliance								
Provide specific details on regulations and requirements				\$1,827.50	\$8,922.50			
Grant Michael				\$510.00	\$2,490.00			
Noah Halperl				\$510.00	\$2,490.00			
Nick Herrcane				\$510.00	\$2,490.00			
Research Assistant				\$297.50	\$1,452.50			

Cash Flow – Page 4

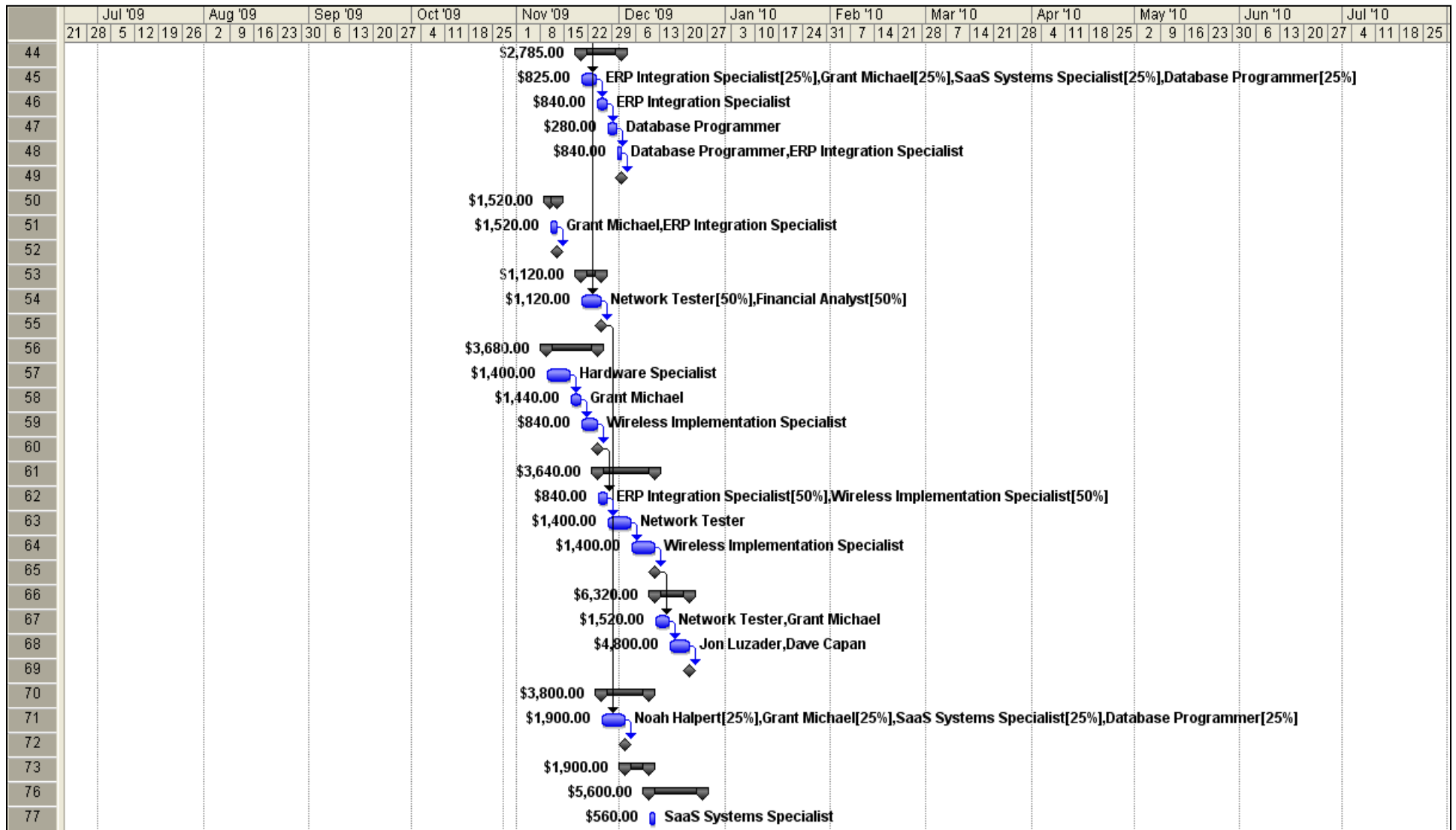
Cash Flow as of Wed 10/28/09
CRM, Logistics and Compliance Management WBS

	September	October	November	December	January	February	March	April
Train Employees on CRM system								
Hold Training Seminar for CRM system					\$95.00	\$665.00		
Grant Michael					\$30.00	\$210.00		
Noah Halperl					\$30.00	\$210.00		
ERP Integration Specialist					\$17.50	\$122.50		
SaaS Systems Specialist					\$17.50	\$122.50		
Complete CRM Training								
Train Field Employees on Mobile Devices								
Hold Training Seminar for Mobile Field Devices						\$490.00		
Jon Luzader						\$180.00		
Grant Michael						\$120.00		
Noah Halperl						\$120.00		
SaaS Systems Specialist						\$70.00		
Hand-out Mobile Field Devices						\$70.00		
Hardware Specialist						\$70.00		
Complete Field Employee Training								
Train Warehouse Employees on Mobile Warehouse Devices								
Hold Training Seminar for Mobile Warehouse Devices						\$1,140.00		
Nick Herrcane						\$360.00		
Dave Caplan						\$360.00		
Technical Installation Specialist						\$210.00		
Wireless Implementation Specialist						\$210.00		
Complete Warehouse Training								
Finalize all Training								
Complete Recruiting Phase								
Monitoring and Controlling								
Analyze Research for Each Workstream								
Maintain Project Website								
Locate Weaknesses Across the CRM System								
Develop Strategies to Patch Weaknesses and Loopholes in the System								
Maintain System Compliance								
Coordinate Training Seminars								
Ensure Compliance of EU Regulations								
Hold Weekly Milestone Meetings								
Report Performance with Project Stakeholders								
Archive Project Files								
Complete Monitoring and Controlling Phase								
Closing								
Lessons Learned Report						\$13,200.00		
Jon Luzader						\$3,600.00		
Grant Michael						\$2,400.00		
Noah Halperl						\$2,400.00		
Nick Herrcane						\$2,400.00		
Dave Caplan						\$2,400.00		
Close out Contract						\$720.00		
Jon Luzader						\$720.00		
Receive Formal Acceptance of Delivered Work								
Prepare Final Project Report								
Present Final Project							\$103.50	
Jon Luzader							\$40.50	
Grant Michael							\$13.50	
Noah Halperl							\$18.00	
Nick Herrcane							\$18.00	
Dave Caplan							\$13.50	
Complete Closing Phase								
Project Complete								
Total	\$56,400.00	\$56,540.00	\$35,123.33	\$19,182.50	\$9,017.50	\$16,285.00	\$103.50	

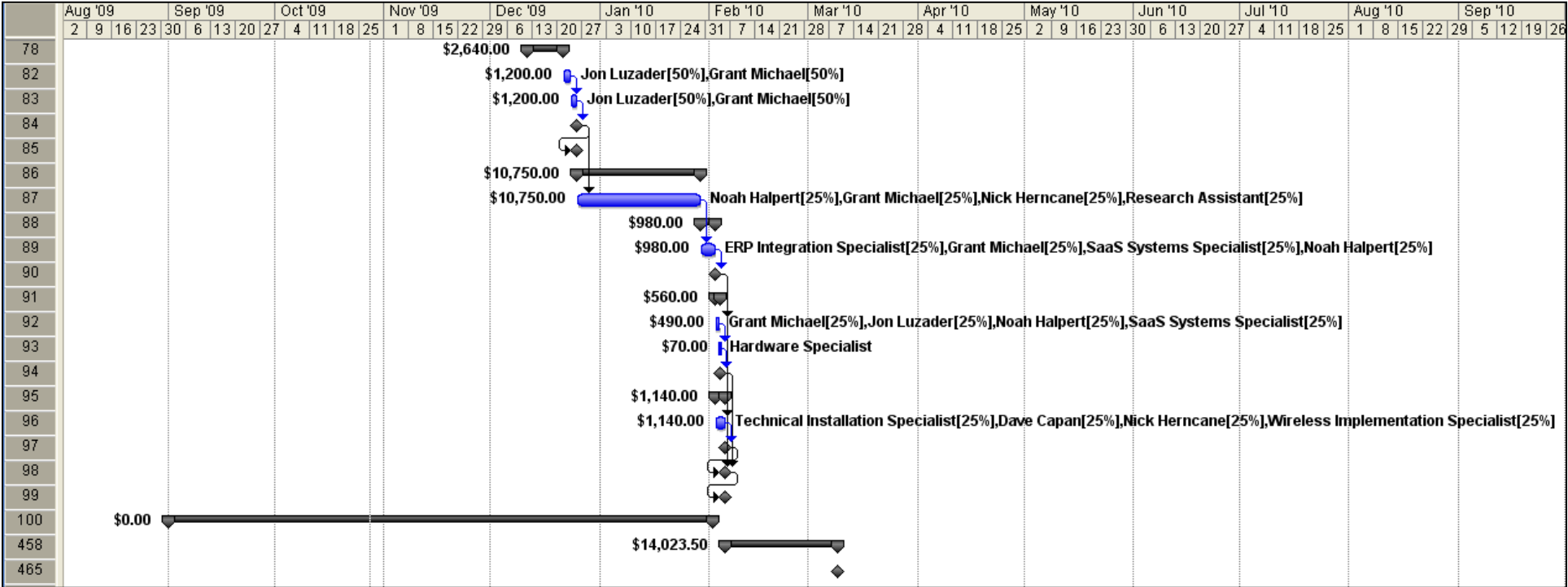
Gantt Chart – Page 1



Gantt Chart – Page 2



Gantt Chart – Page 3



Milestone Report

Milestones as of Wed 10/28/09
CRM, Logistics and Compliance Management WBS

ID		Task Name	Duration
1	✓	Initiating	5.25 days
100		Monitoring and Controlling	110 days
7		Planning	105.5 days
12		Project Plans Approved	0 days
13	✓	Research CRM applications	10 days
19		Research Mobile VPN Hardware and Software	10 days
21	✓	Determine best mobile device	0 days
18	✓	Determine best CRM software application	0 days
23		Determine necessary software applications needed	0 days
24		Complete Planning Phase	0 days
25		Executing	65 days
26		Develop Project Website	1.92 days
32		Acquire Mobile Field Devices	2 days
35		Acquire Network Materials	1 day
40		Test CRM system compliance with SOA standards	8 days
56		Install Network Materials	11 days
29		Finalize Project Website	0 days
50		Test CRM applications for mobile and enterprise systems compliance	2 days
52		Complete mobile and enterprise compliance testing	0 days
43		Finalize SOA standard testing	0 days
44		Integrate CRM with Microsoft Outlook	8 days
53		Setup electronic transaction software system within company intranet	4 days
60		Finalize Network Installation	0 days
61		Test CRM System Integration with Wireless Reporting Tools	13 days
55		Complete electronic transaction software implementation	0 days
70		Setup dashboards for inventory and shipment status	10 days
49		Conclude Microsoft Outlook implementation	0 days
72		Finalize dashboard design	0 days
73		Ensure warehouse management functionality	5 days
76		Test metrics reporting	12 days
65		Finalize wireless reporting tools testing	0 days
66		Test automated fulfillment process	6 days
69		Finalize Automated Fulfillment Testing	0 days
84		Complete metrics reporting testing	0 days
85		Finalize all CRM testing	0 days
88		Train Employees on CRM system	2 days
90		Complete CRM Training	0 days
91		Train Field Employees on Mobile Devices	1.25 days
95		Train Warehouse Employees on Mobile Warehouse Devices	3 days
94		Complete Field Employee Training	0 days
97		Complete Warehouse Training	0 days
98		Finalize all Training	0 days
99		Complete Executing Phase	0 days
458		Closing	21.69 days
465		Project Complete	0 days

Risk Register

Rank	Risk	Description	Category	Root Cause	Triggers	Potential Responses	Risk Owner	Probabilit	Impact	Impact Rank	Status
1	System Failure	System does not comply with TTC company-wide SO	Compatibilit	Faulty Software	Software or hardware installed incorrectly	Develop compatible software and upgrade hardware	TTC	Low	Complete System Failure	High	Safe
2	System Hacked	System becomes hacked and valuable company information is leaked	Security	Inadequate Security	Hacker disables firewall	Increase Security, continuously test security and patch any holes	TTC	Moderate	Competitors get ahold of customer information and adjust to comply with TTC's customer needs	Moderate	Safe
3	Employees Reject System	Employees reject new system and company morale declines	Training	Inadequate Training	Employees not trained in new system	Employee training in new system	TTC	High	Employees become disgruntled and worker efficiency declines	Low	Safe
4	Mobile Hardware Incompatible	System does not operate with handheld mobile devices and wireless reporting tools	Efficiency	Software does not operate remotely	Incompatible hardware and software	Upgrade hardware and develop software with wireless capability	TTC	Low	Efficiency decreases until all wireless devices are compatible with system	Moderate	Safe
5	Efficiency	System does not increase company efficiency or profitability	Efficiency	Ineffective system	Poor Training; poor management	Re-develop system or train employees	TTC	Low	System becomes irrelevant	Low	Safe
6	Interest	Tasty Treats lacks interest in proposed system	Interest	Lack of interest from Tasty Treats	TTC does not approve of new system	Develop strong business case to persuade executives	SPE	Low	SPE loses TTC as a client	High	Safe
7	SaaS system inadequate	SaaS system cannot handle demand of TTC	Compatibilit	SaaS system too small	Demand for software exceeds bandwidth of SaaS-oriented system	Upgrade SaaS bandwidth to handle demand of personnel in TTC	TTC	Moderate	TTC efficiency decreases and business traffic slows	Moderate	Safe
8	Poor Training	Employees do not get enough training with new system and efficiency drops	Training	Inadequate Training	Inadequate training, testing	Host mandatory training seminars on the new system	TTC	High	Efficiency decreases for TTC until each employee becomes comfortable with new system	Low	Safe
9	Project Exceeds Budget	SPE requires more funds than estimated to complete project	Scope	Delays, poor work ethic	Delays in various parts of the project cause money to be wasted on resources	TTC increases budget to suffice project needs	SPE, TTC	High	TTC spends more money than estimated on the project and may become unhappy with SPE	High	Safe
10	Project Delayed	The new system is delayed several months	Scope	Inadequate funding; faulty hardware/software; poor work ethic, unforeseen causes	Inadequate funding could cause delays due to work stoppage as well as being unable to acquire the right hardware and software.	SPE gives new completion date with approval from TTC.	SPE, TTC	High	New system is not up and running by the original estimated date. This causes loss in efficiency and revenue for TTC.	High	Safe
11	Stolen/lost mobile hardware	The new mobile hardware becomes either lost or stolen	Security	Theft or misplacement	Inadequate security of facilities and human error cause mobile devices to misplaced or stolen.	Password protected phones, security training seminars, warranty plans.	TTC	High	TTC spends money to replace missing mobile devices but efficiency does not drop far.	Low	Safe
12	iBolt fails	Software iBolt has trouble integrating SAP, Oracle and SalesForce	Compatibilit	Software compatibility	Ibolt fails to deliver on its promises to support all systems	Other solutions and software will be researched.	TTC	Low	Efficiency drops	Low	Safe