

SPE Consultants, Inc.

CRM, Logistics, and Compliance Management

Set II Deliverables

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Grant Michael



10.30.2009

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SPE Consultants Contract

Project Name: CRM, Logistics and Compliance Management

Project Leader: Jon Luzader

Date: October 27, 2009

Project Team Members Names and Sign-off:

<u>Name</u>	<u>Sign-off on Team Contract</u>
Jon Luzader	<i>Jon Luzader</i>
Grant Michael	<i>Grant Michael</i>
Nick Hercane	<i>Nick Hercane</i>
Noah Halpert	<i>Noah Halpert</i>
Dave Capan	<i>Dave Capan</i>

I. Code of Conduct:

As a project team, we will:

1. Keep what is best for the team in mind at all times.
2. Work proactively, anticipating potential problems and working to prevent them.
3. Make sure team members have up to date materials and project information.

II. Participation:

We will:

1. Collaborate as a team and make effective decisions.
2. Encourage diversity in team work.
3. Allow each team member to voice their opinion before making a final decision.
4. Be open to new approaches and consider new ideas.

III. Communication:

We will:

1. Present ideas clearly and concisely.
2. Keep discussions focused on the subject matter.
3. As a team choose the most efficient and effective way for team members to communicate.
4. Contact all individuals within the project team when a change has occurred.

5. Have the project manager facilitate all meetings and arrange for phone and video conferences as needed.

IV. Problem Solving:

We will:

1. Encourage all team members to participate in solving problems.
2. Work with each other to determine the best solution
3. Develop several approaches to solving a problem and deciding as a team which is the best solution.

V. Meeting Guidelines:

We will:

1. Plan to have face-to-face meeting every Wednesday evening.
2. Plan to have telephone conference for participants bi-weekly on Friday morning.
3. Hold other meetings as needed.
4. Record meeting minutes and send them out via e-mail within 24 hours of all project meetings, focusing on decisions made and action items from each meeting.

Stakeholder Register for CRM, Logistics and Compliance Management

Prepared by: Nick Herncane, Dave Capan

Date: 10/24/09

Name	Position	Internal/External	Project Role	Contact Information
Alan Meng	TTC Executive	External	Project Advisor	zmeng@us.ibm.com
Mike Cassidy	TTC Executive	External	Project Advisor	mwc5004@gmail.com
Jon Luzader	Project Manager	Internal	Project Manager	jon.luzader@gmail.com
Grant Michael	Senior Consultant	Internal	Software Specialist	gpm5030@psu.edu
Nick Herncane	Consultant	Internal	Technology Specialist	nmh5046@psu.edu
Noah Halpert	Consultant	Internal	Business Specialist	nah5058@psu.edu
Dave Capan	Consultant	Internal	Systems Specialist	dave.capan@gmail.com
TTC Associates	Associates	External	System testers and main users	Vern.hayes@ttc.com

Stakeholder Management Strategy for CRM, Logistics and Compliance Management

Prepared by: Dave Capan, Nick Herncane

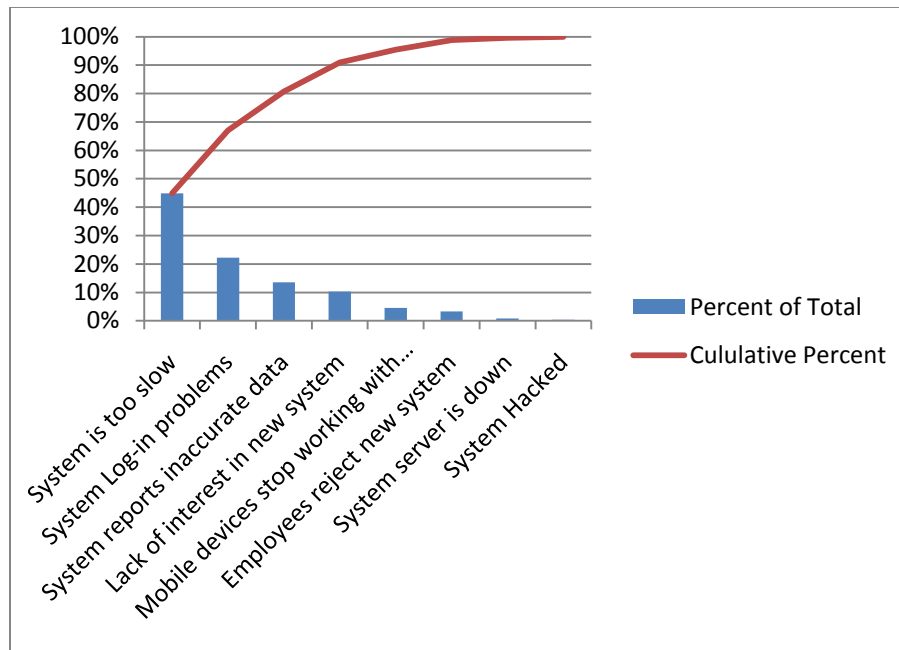
Date: 10/24/09

Name	Level of Interest	Level of Influence	Potential Management Strategies
Alan Meng	High	High	Has a lot on his plate but makes time to meet and discuss the overall progress of SPE's project. Schedule frequent meetings with him and Mike to keep project on track with what they expect.
Mike Cassidy	High	High	Also has a lot on his plate with other projects in TTC. Works side-by-side with Alan. Keep him informed of key issues and dates.
Jon Luzader	High	High	Proactive and keeps project team in line. Works well with team but needs to keep Alan and Mike updated with project progress.
Grant Michael	High	High	In charge of getting software licenses and overseeing the installation and development of such software. Needs to stay updated with rest of the team to be successful. NEEDS TO BE FIRED.
Dave Capan	High	High	Ensures network compatibility and security for all TTC devices and personnel. Working on other projects within SPE so needs to be kept

			on track.
Nick Herncane	High	High	In charge with installing any new technology required. Needs to keep other consultants updated with what technology is used and installed.
Noah Halpert	High	High	Charged with the business aspect of the project. Works closely with Mike and Alan to ensure project stays within scope.
Associates	Medium	Medium	Needs to be trained with the system. Feedback also needs to be gathered from the lower TTC associates for improvements.

Pareto Diagram

Issues	Frequency/Week	%Total	Cum. %
System is too slow	109	45%	45%
System Log-in problems	54	22%	67%
System reports inaccurate data	33	14%	81%
Lack of interest in new system	25	10%	91%
Mobile devices stop working with new system	11	5%	95%
Employees reject new system	8	3%	99%
System server is down	2	1%	100%
System Hacked	1	0%	100%
Totals	243	100%	100%



Meeting Agenda- SPE Consultants, Inc.

Time: 10/30/2009

Location: TTC Headquarters

Called by: Veronica Hayes

I. Attendees

Jon Luzader	Noah Halpert	Nick Herncane	Grant Michael	Dave Capan
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II. Agenda Topics

- Overview and current progress/status of project.
- Transition and integration of all new systems into one common interface.
 - Oracle to SAP Business Objects using ibolt.
- Installation of wireless access points and integration with handheld wireless devices.
 - Switch to incorporate use of handhelds
- Overview of proposed resolutions.
 - Includes training seminars, demos, and testing.

III. Goals

SPE is currently attempting to resolve a few problems dealing with the proposed system. These challenges deal with the transition and integration of Oracle to SAP Business Objects. Installation of wireless access points and integration with handheld wireless devices has also come up as a major challenge. These challenges have the potential to delay or even terminate the project if not resolved in a timely manner. SPE would like TTC's input on these outstanding issues.

IV. Assignments/Resolution

SPE has come up with some resolutions to these challenges. Training seminars could be given to current employees to introduce and teach the new system before it is put into place. Also, testing could be used on the system in select locations to collect valuable feedback from employees. In dealing with the wireless and handheld challenges, SPE can have the companies producing the technology to send representatives to demonstrate their products as well as answer questions. This could take the place of

an employee training seminar. Another possible solution could be to acquire different technology that is more compatible and similar to what is currently implemented.

V. Next Meeting December 02, 2009