

Project: CRM replacement

Project Status Table

Project	Stages							
CRM replacement ● On Track	Requirements Gathering ● On Track	Market Research ●	Purchase ●	Prototype ●	training rollout ●	Mel Perchase ●	Work Package Purchase 01 ●	Work Package Purchase 02 ●

Project Roles

Project Assurance	karl
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All Spreadsheet Tables

Name	CRM replacement	Description of Project
Overall Status	●	Project Description: Replacing existing CRM with new product
Current Phase	0	
Estimated End date	End December	
Customer	Amy Wright	
Sponsor	Amy	
PM	Malcolm	
Status		Commentary
Ownership	●	Sponsor involvement has been great , speaking at training courses
Schedule	●	On-Track, with no concerns
Resources	●	Starting to release resources back to owners now
Risk	●	A could of new risks included in register
Budget	●	within Tolerance
Scope	●	no concerns
Tech	●	Serveral issues arising during training which indicate the next phase release may need to be taken

General

Project Name	CRM Replacement
Stage Name	(if applicable)
Project Manager	M West
Report Date	12th September 2017
Status Summary	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam elementum orci tempus arcu imperdiet, in tincidunt sapien scelerisque. Quisque mattis sem vitae condimentum accumsan. Cras quam tellus, dignissim porttitor congue et, euismod sed quam. Fusce rhoncus mattis eleifend. Proin imperdiet blandit dui ac iaculis. Integer eget felis ultricies, pharetra tortor eu, finibus urna. Vivamus gravida ipsum eget justo viverra, at blandit mauris feugiat.

Project Tolerance Status	Praesent eleifend egestas sodales. Sed leo nibh, commodo eu augue id, consectetur luctus mauris. Quisque velit ante, hendrerit tristique felis sed, consectetur accumsan dui. Proin posuere et lectus vitae congue. Fusce facilisis, lacus eget faucibus aliquet, nulla massa porta tortor, at sodales lacus eros id mauris.
Requests for Change	Cras ipsum ex, faucibus nec tincidunt nec, vestibulum id felis. Nullam sit amet ligula neque. Curabitur non augue ligula. Pellentesque egestas ut leo vitae facilisis. Nullam sapien dui, egestas nec sagittis blandit, auctor mattis eros
Key Issues and Risks	New risk identified around ongoing viability of supplier
Lessons Report	

Project: CRM replacement

This Reporting Period

Work Packages

Ref no and name	status and notes

Products

Ref no and name	Status and notes

Corrective Actions undertaken	<p>Maecenas vehicula, velit in commodo posuere, elit justo semper nisi, non rutrum arcu tellus ac odio. Sed varius placerat feugiat. Nulla tristique elementum purus, in tincidunt ante lobortis non. Donec nec ipsum tortor.</p> <p>Integer faucibus pulvinar magna quis dapibus. Integer eu velit auctor, aliquam orci ut, elementum eros.</p> <p>Nulla ultricies tortor nulla, quis ultricies ligula iaculis ac. Duis facilisis quam quis arcu ullamcorper, ac tristique erat egestas.</p>
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Next Reporting Period

Work Packages

Ref no and name	status and notes

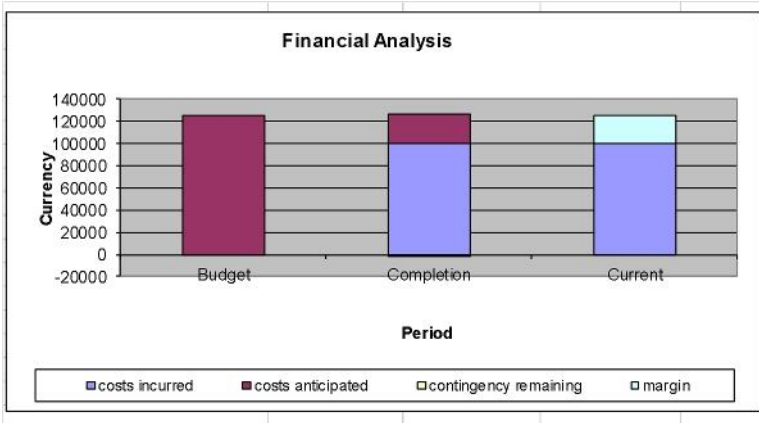
Products to be completed

Ref no and name	Status and notes

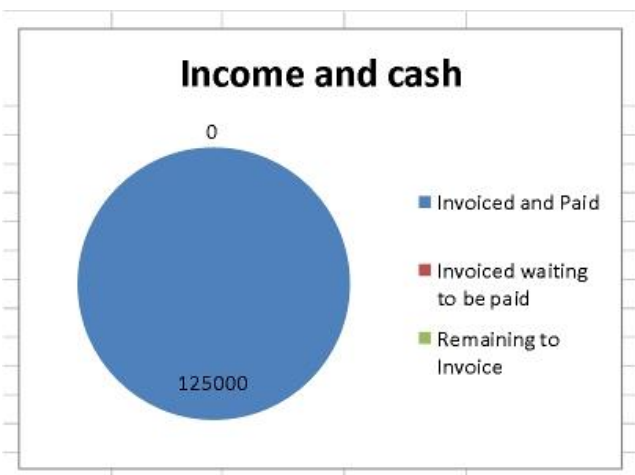
Corrective Actions to be undertaken	<p>Ut ornare dui felis, sed fermentum augue imperdiet nec. Proin sed ultrices turpis. Morbi varius orci in tortor eleifend, vitae venenatis nisi dictum.</p>
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Benefit ID	Benefit type	Benefit Measure	Benefit Description	Benefit Rating	Owner	Requirements for Benefit Delivery	Measurement	Review and Progress Notes	Benefit Delivered	Status
CRM Replacement4	Financial Disbenefit	-80000	investment required	10	Amy	Agreement by Board to investment decision and payback justification		Agrees at board 1/5/15	-15000	On Track
CRM Replacement3	Financial	40000	more savings	8	Steve	Time savings being able to be used to deliver invoiceable work		All time should be able to be diverted accordingly	10000	On Track
CRM Replacement2	Financial	120000	savings	5	Steve	Reduced rework		Indications of this are good	80000	On Track
CRM Replacement1	Reputation	press	this will help	3	Jane			No adverse reports in press but also nothing positive yet		On Track

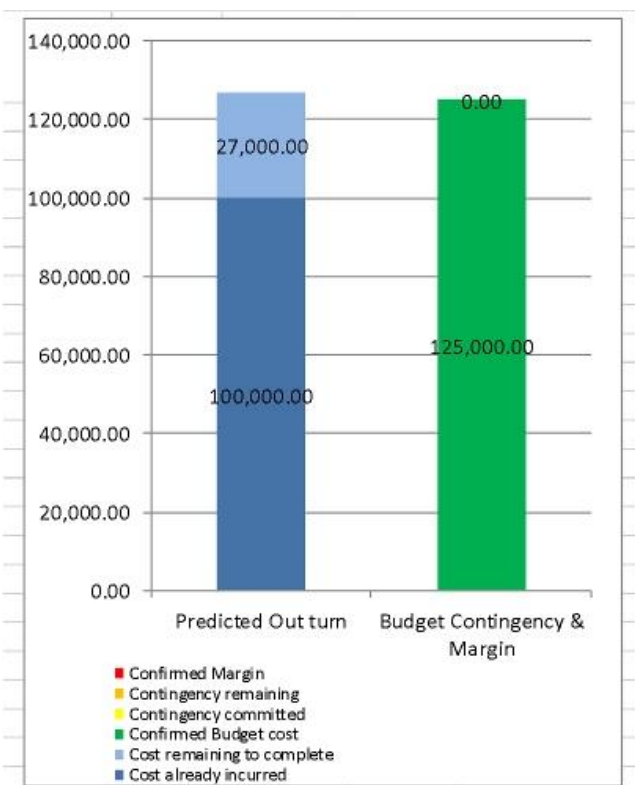
Project: CRM replacement
All Spreadsheet Images



Document: 'Daily Log and Project Controls' File: 'Project Finances.xlsx' Version: '0.h' Date: '11/09/2017'

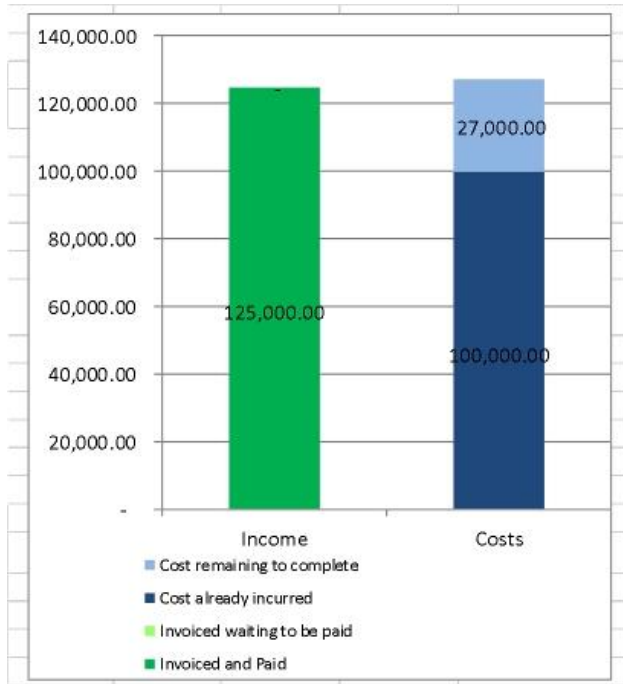


Document: 'Daily Log and Project Controls' File: 'Project Finances.xlsx' Version: '0.h' Date: '11/09/2017'

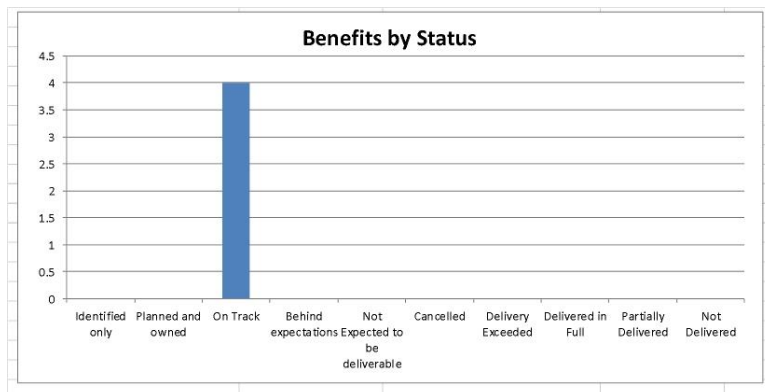


Project: CRM replacement

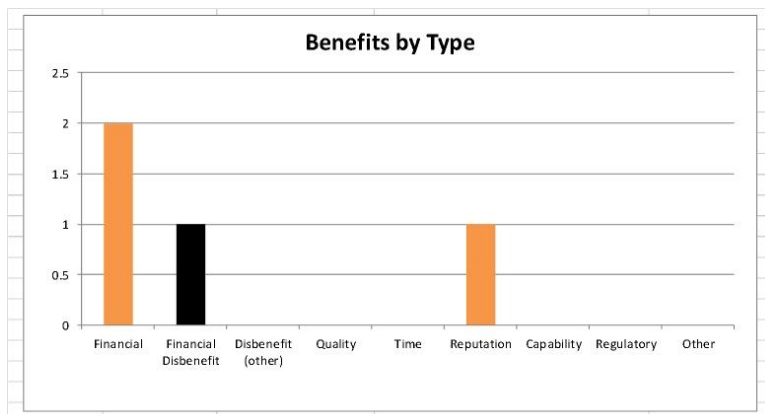
Document: 'Daily Log and Project Controls' File: 'Project Finances.xlsx' Version: '0.h' Date: '11/09/2017'



Document: 'Daily Log and Project Controls' File: 'Project Finances.xlsx' Version: '0.h' Date: '11/09/2017'

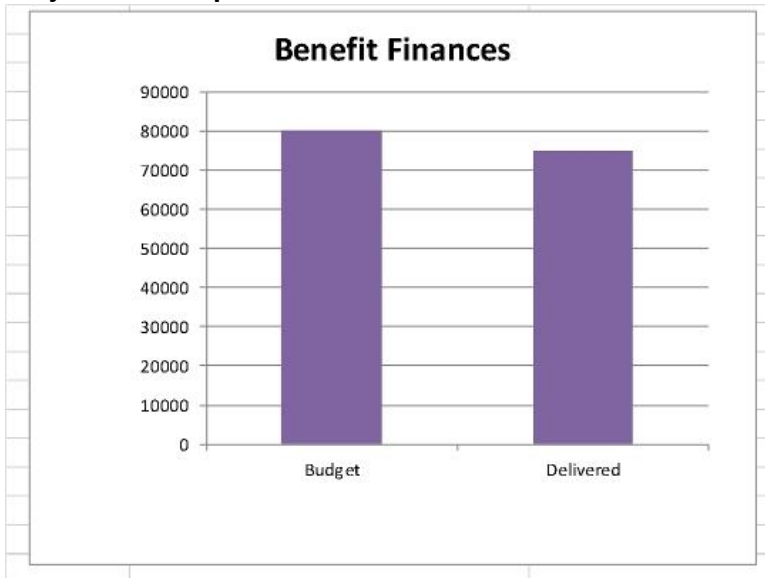


Document: 'Benefits Management' File: 'Benefits Register.xlsx' Version: '0.j' Date: '01/08/2017'



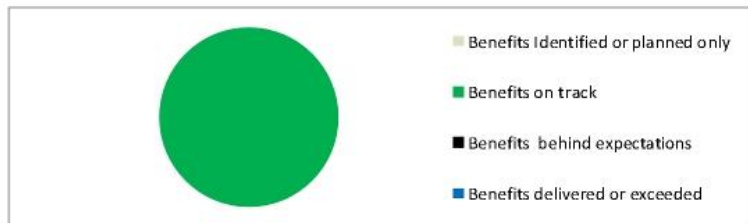
Document: 'Benefits Management' File: 'Benefits Register.xlsx' Version: '0.j' Date: '01/08/2017'

Project: CRM replacement



Document: 'Benefits Management' File: 'Benefits Register.xlsx' Version: '0.j' Date: '01/08/2017'

Benefit Measure	Value	Percentage
Overall Benefit Status	Exceptional	
Net Benefit Value Planned	80,000	
Net Benefit Value Delivered	75,000	
Benefit vs Disbenefit as ratio (count)	3	
Benefit vs Disbenefit as ratio (value)	2	
No. of Benefits and Disbenefits under Management	4	
Benefits Identified or planned only	0	0%
Benefits on track	4	100%
Benefits behind expectations	0	0%
Benefits delivered or exceeded	0	0%



Document: 'Benefits Management' File: 'Benefits Register.xlsx' Version: '0.j' Date: '01/08/2017'

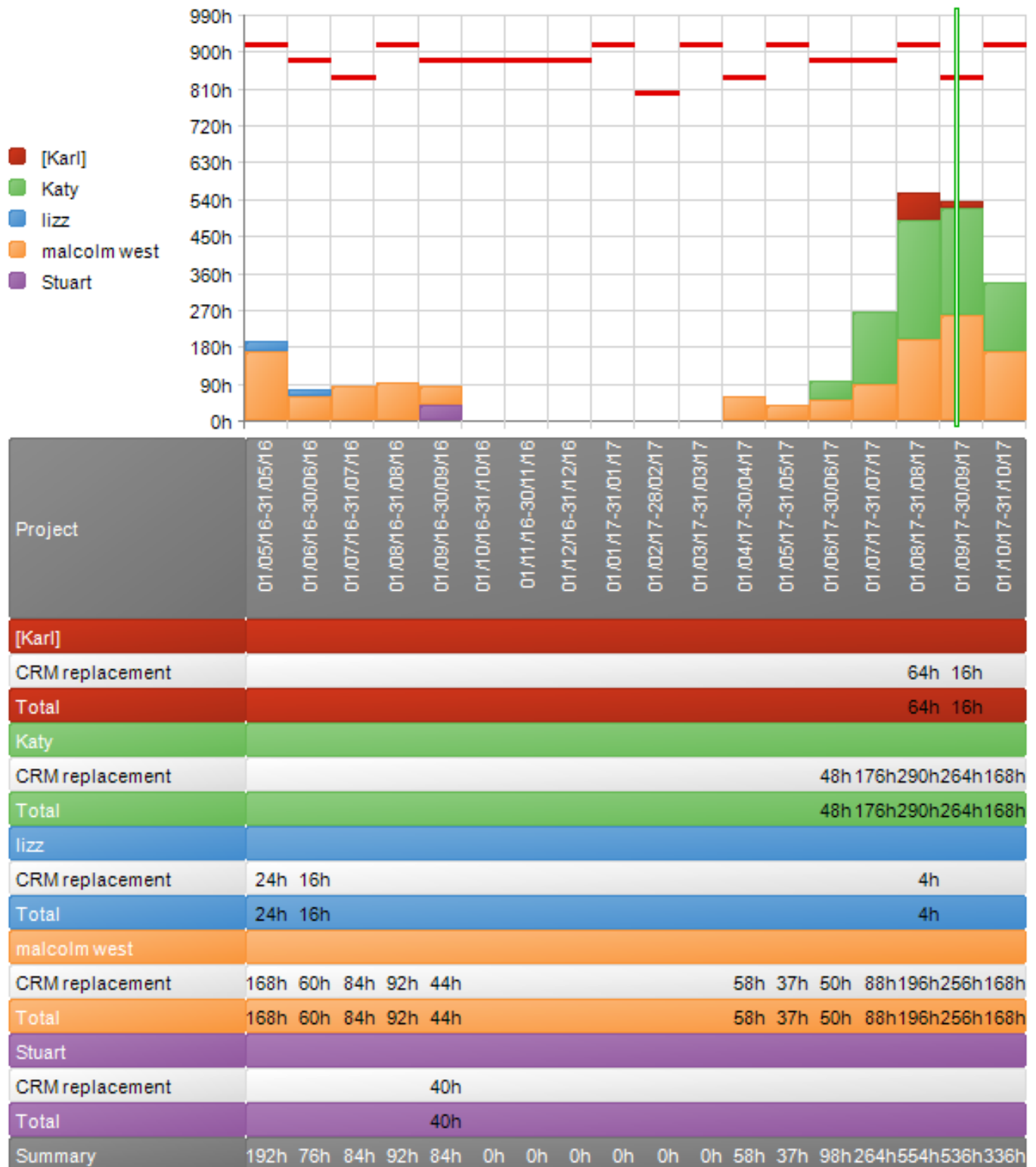
Project: CRM replacement

Task ID	Task Name	Start	Finish	Duration	% Complete	Resources
1	CRM replacement	03/05/2016	27/10/2017	389d	94.6	
2	Milestones	03/05/2016	27/10/2017	389d	50	
3	Baseline Start	03/05/2016	03/05/2016	0d	100	
4	Actual Start	03/05/2016	03/05/2016	0d	100	
5	Baseline Finish	12/10/2017	12/10/2017	0d	0	
6	Actual Finish	27/10/2017	27/10/2017	0d	0	
7	Requirements Gathering	03/05/2016	23/06/2016	38d	100	
8	Requirements gathering	03/05/2016	23/05/2016	15d	100	[malcolm west 100%]
9	Data Analysis	24/05/2016	06/06/2016	10d	100	[malcolm west 100%] [lizz 50%]
10	Assemble outlines	07/06/2016	13/06/2016	5d	100	
11	Workshop	16/06/2016	16/06/2016	1d	100	[malcolm west 50%]
12	Prepare Requirements Definition	17/06/2016	23/06/2016	5d	100	[malcolm west 10%]
13	A Milestone	23/06/2016	23/06/2016	0d	100	
14	Supplier Selection	24/06/2016	01/09/2016	50d	100	[malcolm west 50%]
15	New TT task	02/09/2016	08/09/2016	5d	100	[malcolm west 100%] [Stuart 100%]
16	Purchase	02/09/2016	13/10/2016	30d	100	
17	Implementation	14/10/2016	30/03/2017	120d	100	
18	Completion	30/03/2017	30/03/2017	0d	100	
19	Phase 2	31/03/2017	18/08/2017	101d	100	
20	Review of upgrade	31/03/2017	13/04/2017	10d	100	
21	User feedback	14/04/2017	27/04/2017	10d	100	[malcolm west 50%]
22	Assess option to take upgrade	14/04/2017	22/06/2017	50d	100	[malcolm west 20%]
23	Review Meeting	23/06/2017	17/08/2017	40d	100	[malcolm west 50%] [Katy 100%]
24	Notify Supplier	18/08/2017	18/08/2017	1d	100	[Katy 25%] [lizz 50%]
25	malc task	21/08/2017	21/08/2017	1d	100	[Katy 100%]
26	Kate task	22/08/2017	04/09/2017	10d	49	[Karl 100%] [Katy 50%]
27	Testing	21/08/2017	15/09/2017	20d	24	[malcolm west 100%] [Katy 100%]
28	Training	21/08/2017	27/10/2017	50d	94	[malcolm west 100%] [Katy 100%]

Standard Properties

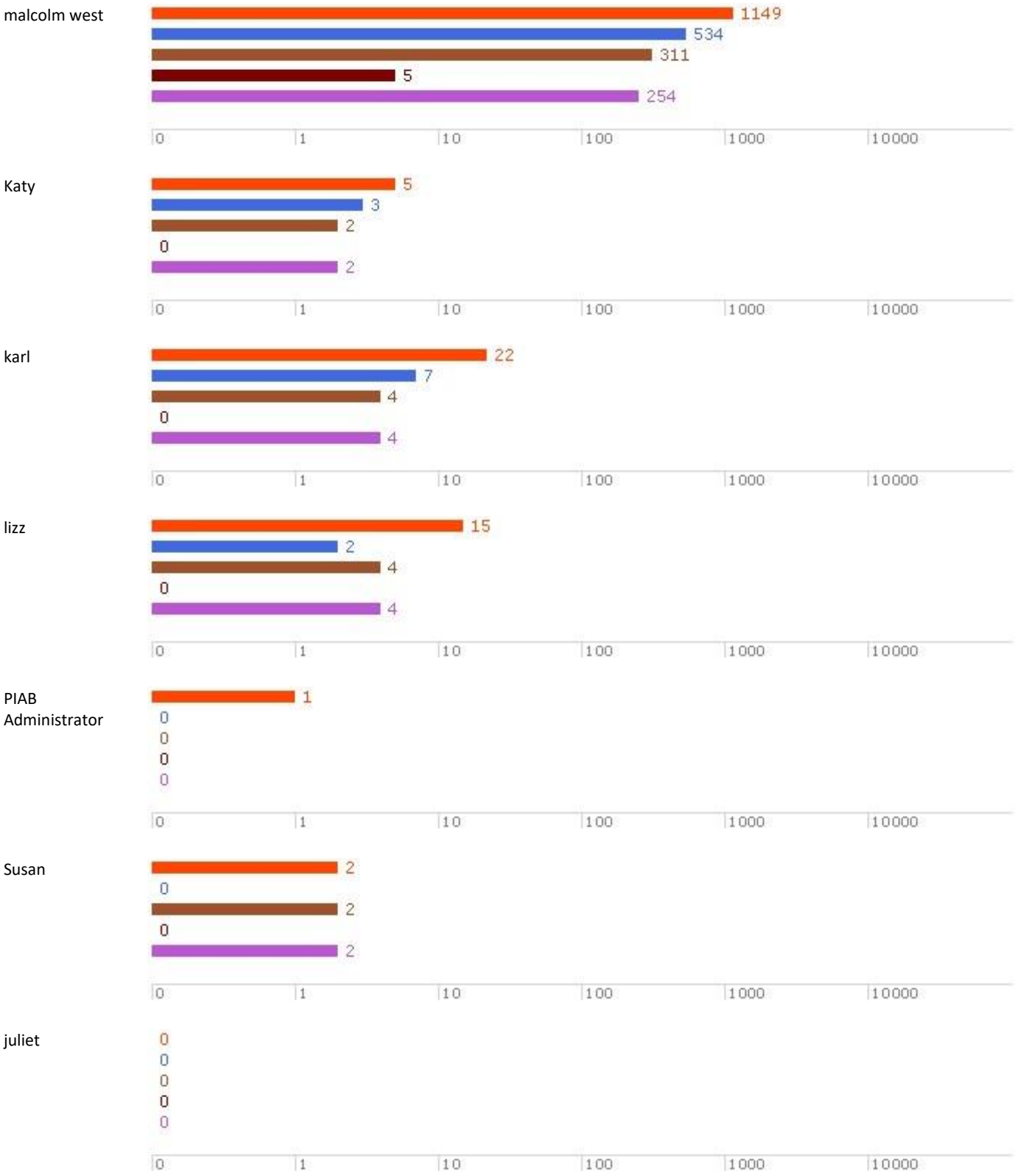
Project	Project Status	Description	Project Code	Commentary	Customer	Business Area	Strategic Method Template
CRM replacement	On Track	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque sagittis, turpis porta dignissim ornare, nibh neque vulputate mi, ac dignissim nibh odio sit amet arcu. Ut molestie vitae magna et volutpat. Maecenas rhoncus dui tortor, ac condimentum urna volutpat at. erjopoerjhpoerjher er;hje;lrljh;lejh;aleh;laerh	353336	Ut placerat auctor iaculis. In convallis, eros non aliquet egestas, lorem arcu sodales dui, nec vehicula nulla augue sit amet sapien. Donec porttitor, ante eu hendrerit porta, velit nunc ornare purus, id euismod tortor ex vitae lacus. weotjqpeorypquoerhjpqe erlh;hjpoijt	Amy Wright	Corporate Services	4step method

Project: CRM replacement
Project Resource Chart



Project: CRM replacement
User Activity

- SelectProject
- ViewFiles
- Check-out
- Check-out to email '{0}'
- Check-in



Project: CRM replacement
Project Documents

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
Project	About Favourites	, , , , , ,	Favourites-README.pdf		V1 0.a				
Project	Acceptance Record	, , , , , ,	Message from PIAB 2015-04-21T14_16_38 Login.msg		V1 0.a <none>				
			method-picker.xlsx		V1 0.a <none>				
Project	Benefits Management	, , , , , ,	Benefits Register.xlsx		V10 0.j				
			Project Approval Form.docx		V1 0.a <none>				
Project	Daily Log and Project Controls	Mandatory, Complete, , , ,	Daily Log.docx	Checked-out to malcolm west	V6 1.c				
			Methodology Playbook.xlsx		V1 0.a <none>				
			Project Finances.xlsx		V8 0.h				
			Project Plan.docx	Checked-out to malcolm west	V4 0.d				

Project: CRM replacement

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			Project Schedule Risks and Issues.spn		V125 0.du				
			Project Status Reporting.xlsm		V7 0.g				Cancelled
Project	End Project Report	, , , , ,							
			End Project Report.docx		V1 0.a				
Project	Exception Plan	, , , , ,							
Project	Executive Role and Appointment	, , , , ,							
			Executive Role.docx		V4 1.a steve				
Project	Highlight Report	, , , , ,							
			Highlight Report.xlsx		V4 0.d				
Project	My Images	, , , , ,							
			W8 desktop.png		V1 0.a Proposed default arrangements				
			W8timeline.jpg		V1 0.a Timeline of features				
Project	Project Board Advice	, , , , ,							
			FW Meeting changed Ver 3 4 changes.msg		V1 0.a <none>				
			Message from PIAB - Add File to Document - Document 'Project Mandate' Project 'CRM replacement'.msg		V2 0.b				

Project: CRM replacement

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			Project Approval Form.docx		V1 0.a <none>				
Project	Project Initiation Documentation	, , , , ,							
			capbudg-extended.xlsx		V2 0.b				
			Desktop rollout.xlsx		V2 0.b				
			Project Initiation Documentation.docx	Approval in Progress	V2 1.a for approval				In Progress
Project	Project Management Team Role and Appointments	, , , , ,							
			Project Manager Role.docx		V1 0.a				
Project	Project Mandate	, Approved, Delayed, ,							
			Approval to proceed with work package 45.msg		V1 0.a <none>				
			Book2.xlsx		V1 0.a <none>				
			capbudg-extended.xlsx		V1 0.a <none>				
			Desktop rollout.xlsx		V1 0.a <none>				
			google.url		V1 0.a <none>				

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Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			notes of meeting today.docx		V2 0.b				
			payback calculator - Copy.xlsx		V1 0.a <none>				
			payback calculator.xlsx		V1 0.a <none>				
			Project Approval Form.docx		V1 0.a <none>		Y		Approved
			Project Finances.xlsx		V1 0.a <none>				
			Project Mandate.docx		V117 9.w				
Project	Reports	, , , , , ,							
			2015-11-25-1623-001-Project-Report.zip		V1 0.a Published from Enterprise Hub.				
			2015-11-25-1629-001-portfolio-report.zip		V1 0.a Published from Enterprise Hub.				
			2016-01-27 1534 Project - 2015 - Poster to Word.zip		V1 0.a this was a word one				
			2016-01-28 0933 Portfolio - 2015 - Benefits Reporting - Word.zip		V1 0.a <none>				
			Aug 17 report.zip		V1 0.a <none>				
			eryer.zip		V1 0.a <none>				

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Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			Feb 2015 Poster.zip		V1 0.a new poster into Word				
			for J.zip		V1 0.a <none>				
			lksgasd.zip		V1 0.a <none>				
			oct report.zip		V1 0.a <none>				
			Portfolio Report-[Dept Information Services].zip		V1 0.a <none>				
			project poster 1.zip		V1 0.a <none>				
			Project Report-[CRM replacement]-[3520].zip		V1 0.a <none>				
			project statement 1.zip		V1 0.a <none>				
			project statement 2.zip		V1 0.a <none>				
			project statement Feb 2017.docm		V1 0.a <none>				
			rhreu.zip		V1 0.a <none>				
			Sept report.zip		V1 0.a hjlfh;fh;				
			September report.zip		V1 0.a Approaching midpoint of requirements gathering				

Project: CRM replacement

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			Statement September 17.zip		V1 0.a New Statement report, project almost complete but some remaining issues and risks to iron out.				
Requirements Gathering	Acceptance	, , , , ,							
			method-picker.xlsx		V1 0.a <none>				
Requirements Gathering	Activity	, , , , ,							
Requirements Gathering	Communications	, , , , ,							
			Desktop rollout.xlsx		V1 0.a <none>				
Requirements Gathering	Desk Study Scope	, , , , ,							
			notes on meeting 1-8-12.docx		V1 0.a <none>				
			Viability Assessmnet.xlsx		V1 0.a <none>				
Requirements Gathering	End Study Report	, , , , ,							
Requirements Gathering	Research Plan	, , , , ,							
Market Research	Acceptance	, , , , ,							
			Approval to proceed with work package 45.msg		V1 0.a <none>				
			Message from PIAB 2015-11-13T13_01_26 Login.msg		V1 0.a <none>				

Project: CRM replacement

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
Market Research	Deployed Solution	, , , , ,							
Market Research	Deployment Plan	, , , , ,							
			Deployment Schedule.spn		V1 0.a				
Market Research	Prioritised Requirements List	, , , , ,							
			PrioritisedRequirementsList.docx		V1 0.a				
Market Research	Timebox Plan	, , , , ,							
			TimeboxPlan.xlsx		V1 0.a				
Market Research	Timebox Review Record	, , , , ,							
			TimeboxReviewRecord.xlsx		V1 0.a				
Purchase	Acceptance Testing	, , , , ,							
			Approval to proceed with work package 45.msg		V1 0.a <none>				
Purchase	New Document	, , , , ,							
Purchase	Purchase Contract	, , , , ,							
Purchase	Statement of Requirements	, , , , ,							
Purchase	Supplier Evaluation and Decision	, , , , ,							
Purchase	Supplier Responses	, , , , ,							
Purchase	Supplier Search	, , , , ,							

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Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
Prototype	Acceptance	, , , , ,							
Prototype	Deployed Solution	, , , , ,							
Prototype	Deployment Plan	, , , , ,							
			Deployment Schedule.spn		V1 0.a				
Prototype	Prioritised Requirements List	, , , , ,							
			PrioritisedRequirementsList.docx		V1 0.a				
Prototype	Timebox Plan	, , , , ,							
			TimeboxPlan.xlsx		V1 0.a				
Prototype	Timebox Review Record	, , , , ,							
			TimeboxReviewRecord.xlsx		V1 0.a				
training rollout	Acceptance	, , , , ,							
training rollout	Activity	, , , , ,							
training rollout	Communications	, , , , ,							
training rollout	Desk Study Scope	, , , , ,							
training rollout	End Study Report	, , , , ,							
training rollout	Research Plan	, , , , ,							
Mel Purchase	Acceptance Testing	, , , , ,							

Project: CRM replacement

Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
Mel Purchase	Purchase Contract	, , , , ,							
Mel Purchase	Statement of Requirements	, , , , ,							
Mel Purchase	Supplier Evaluation and Decision	, , , , ,							
Mel Purchase	Supplier Responses	, , , , ,							
Mel Purchase	Supplier Search	, , , , ,							
Work Package Purchase 01	Acceptance Testing	, , , , ,							
Work Package Purchase 01	Purchase Contract	, , , , ,							
Work Package Purchase 01	Statement of Requirements	, , , , ,							
Work Package Purchase 01	Supplier Evaluation and Decision	, , , , ,							
Work Package Purchase 01	Supplier Responses	, , , , ,							
Work Package Purchase 01	Supplier Search	, , , , ,							
Work Package Purchase 02	Acceptance Testing	, , , , ,							
Work Package Purchase 02	Purchase Contract	, , , , ,							
Work Package Purchase 02	Statement of Requirements	, , , , ,							
Work Package Purchase 02	Supplier Evaluation and Decision	, , , , ,							
Work Package Purchase 02	Supplier Responses	, , , , ,							
Work Package Purchase 02	Supplier Search	, , , , ,							
Specialist Products	Guidance	, , , , ,							
Specialist Products	My Images	, , , , ,							

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Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			W8 desktop.png		V				
			W8timeline.jpg		V				
Specialist Products	My Specialist Documents	, , , ,							
Specialist Products	Reports	, , , ,							
			2015-11-25-1623-001-Project-Report.zip		V				
			2015-11-25-1629-001-portfolio-report.zip		V				
			2016-01-27 1534 Project - 2015 - Poster to Word.zip		V				
			2016-01-28 0933 Portfolio - 2015 - Benefits Reporting - Word.zip		V				
			Aug 17 report.zip		V				
			eryer.zip		V				
			Feb 2015 Poster.zip		V				
			for J.zip		V				
			lksgasd.zip		V				

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Document Location	Document Name	Flags	File Name	Status	Latest Version	Baseline	Approved	Approval Type	Approval Status
			oct report.zip		V				
			Portfolio Report-[Dept Information Services].zip		V				
			project poster 1.zip		V				
			Project Report-[CRM replacement]-[3520].zip		V				
			project statement 1.zip		V				
			project statement 2.zip		V				
			project statement Feb 2017.docm		V				
			rhreu.zip		V				
			Sept report.zip		V				
			September report.zip		V				
			Statement September 17.zip		V				
Specialist Products	Reports-Exec	, , , , ,							
			Project Report-[CRM replacement]-[3520].zip		V1 0.a <none>				