

Workplan Template for Analysis and Design Phase

ID	Task Name	Duration	Start	Finish	Resource Names	October	November	December	January	February	March	April	May	June	July	August	September
						10/17/24	11/7/24	11/28/24	12/19/24	1/9/25	1/30/25	2/20/25	3/12/25	4/6/25	4/27/25	5/18/25	6/8/25
1	Project Start-Up	30 days	Mon 3/27/00	Fri 5/5/00													
2	Define Project Scope and Objectives	25 days	Mon 3/27/00	Fri 4/28/00	Team												
3	Identify Objectives	25 days	Mon 3/27/00	Fri 4/28/00	Team												
4	Determine Scope	25 days	Mon 3/27/00	Fri 4/28/00	Team												
5	Verify Objectives and Scope with General Manager	25 days	Mon 3/27/00	Fri 4/28/00	Team												
6	Develop Team Charter	25 days	Mon 3/27/00	Fri 4/28/00	Team												
7	Establish Team Structure	30 days	Mon 3/27/00	Fri 5/5/00	Team												
8	Confirm Team Members	25 days	Mon 3/27/00	Fri 4/28/00	Team												
9	Determine Meetings and Time Frames	25 days	Mon 3/27/00	Fri 4/28/00	Team												
10	Conduct Kick-Off Meeting	30 days	Mon 3/27/00	Fri 5/5/00	Team												
11	Develop Workplan for Analysis and Design Phase	30 days	Mon 3/27/00	Fri 5/5/00	Team												
12	Confirm Deliverables/Outcomes	25 days	Mon 3/27/00	Fri 4/28/00	Team												
13	Confirm Workplan Tasks (top level, sum level, sub level)	25 days	Mon 3/27/00	Fri 4/28/00	Team												
14	Determine Start and Finish Dates	25 days	Mon 3/27/00	Fri 4/28/00	Team												
15	Assign Resource Names	30 days	Mon 3/27/00	Fri 5/5/00	Team												
16	Finalize and Deliver Workplan	6 days	Fri 4/28/00	Fri 5/5/00	Team												
17	Current Environment Assessment ("As Is" Environment)	55 days	Mon 4/10/00	Fri 6/23/00													
18	Document Current Environment	38 days	Mon 4/10/00	Wed 5/31/00	Team												
19	Gather and Document Available Information	25 days	Mon 4/10/00	Fri 5/12/00	Team												
20	Identify Cost and Volume Information	38 days	Mon 4/10/00	Wed 5/31/00	Team												
21	Plan and Schedule Workshop(s)	25 days	Mon 4/10/00	Fri 5/12/00	Team												
22	Conduct Workshop(s) to Discuss Current Environment	30 days	Mon 4/10/00	Fri 5/19/00	Team												
23	Complete Draft Current Environment Document (draft)	35 days	Mon 4/10/00	Fri 5/26/00	Team												
24	Identify Best Practices/Trends	38 days	Mon 4/10/00	Wed 5/31/00	Team												
25	Research Best Practices/Trends	30 days	Mon 4/10/00	Fri 5/19/00	Team												
26	Identify Relevant Best Practices/Trends	35 days	Mon 4/10/00	Fri 5/26/00	Team												
27	Summarize Best Practices/Trends	38 days	Mon 4/10/00	Wed 5/31/00	Team												
28	Develop Business Requirements Matrix	29 days	Fri 4/21/00	Wed 5/31/00	Team												
29	Document Business Requirements	21 days	Fri 4/21/00	Fri 5/19/00	Team												
30	Review Business Requirements	26 days	Fri 4/21/00	Fri 5/26/00	Team												
31	Complete Business Requirements Matrix	29 days	Fri 4/21/00	Wed 5/31/00	Team												
32	Conduct High Level Current Environment Assessment	48 days	Mon 4/10/00	Wed 6/14/00	Team												
33	Compare and Contrast Current Environment to Best P	43 days	Mon 4/10/00	Wed 6/7/00	Team												
34	Summarize Key Observations	48 days	Mon 4/10/00	Wed 6/14/00	Team												
35	Finalize and Deliver Current Environment Assessment	46 days	Fri 4/21/00	Fri 6/23/00	Team												
36	Complete Draft Current Environment Assessment	36 days	Fri 4/21/00	Fri 6/9/00	Team												
37	Conduct Review Session	41 days	Fri 4/21/00	Fri 6/16/00	Team												
38	Finalize and Deliver Current Environment Assessment	26 days	Fri 5/19/00	Fri 6/23/00	Team												
39	Reengineering/Improvement Opportunity Analysis	66 days	Fri 4/28/00	Fri 7/28/00													
40	Identify Reengineering/Improvement Opportunities	51 days	Fri 4/28/00	Fri 7/7/00	Team												
41	Gather Suggestions/Recommendations from Key Stakeholders	49 days	Tue 5/2/00	Fri 7/7/00	Team												
42	Identify Performance Opportunities	49 days	Tue 5/2/00	Fri 7/7/00	Team												
43	Plan and Schedule Workshop(s)	51 days	Fri 4/28/00	Fri 7/7/00	Team												
44	Conduct Workshop(s) to Define Reengineering/Improvement Opportunities	49 days	Tue 5/2/00	Fri 7/7/00	Team												
45	Document List of Reengineering/Improvement Opportunities	43 days	Wed 5/10/00	Fri 7/7/00	Team												
46	Analyze Reengineering/Improvement Opportunities	53 days	Wed 5/10/00	Fri 7/21/00	Team												
47	Prioritize Reengineering/Improvement Opportunities	53 days	Wed 5/10/00	Fri 7/21/00	Team												
48	Determine Reengineering/Improvement Options	51 days	Fri 5/12/00	Fri 7/21/00	Team												

Financial Partners Transformation - Project Name						Workplan Template for Analysis and Design Phase											
ID	Task Name	Duration	Start	Finish	Resource Names	October	November	December	January	February	March	April	May	June	July	August	September
						10 7 24	31 7 14	28 5 12	19 26 2 9	16 23 30 6 13	20 27 5 12	19 26 2 9	16 23 30 7 14	21 28 4 11	18 25 2 9	16 23 30 6 13	20 27 3 10
49	Document Reengineering/Improvement Options and C	50 days	Mon 5/15/00	Fri 7/21/00	Team												
50	Research Reengineering/Improvement Options Cost/E	48 days	Wed 5/17/00	Fri 7/21/00	Team												
51	Select Reengineering/Improvement Options and Confi	45 days	Mon 5/22/00	Fri 7/21/00	Team												
52	Finalize Reengineering/Improvement Opportunity Ana	38 days	Wed 6/7/00	Fri 7/28/00	Team												
53	Complete Draft Reengineering/Improvement Options	38 days	Wed 6/7/00	Fri 7/28/00	Team												
54	Conduct Reengineering/Improvement Opportunity Rev	35 days	Mon 6/12/00	Fri 7/28/00	Team												
55	Finalize and Deliver Reengineering/Improvement Opp	30 days	Mon 6/19/00	Fri 7/28/00	Team												
56	Conceptual Design/Technical Design/Business Case ("To I	116 days	Fri 4/21/00	Fri 9/29/00													
57	Develop Conceptual Design	95 days	Fri 4/21/00	Thu 8/31/00	Team												
58	Identify Future Business Requirements	81 days	Fri 4/21/00	Fri 8/11/00	Team												
59	Define Scope for To Be Environment (including high le	40 days	Mon 6/19/00	Fri 8/11/00	Team												
60	Map Key Business Processes ("As Is" - "To Be")	45 days	Mon 6/19/00	Fri 8/18/00	Team												
61	Identify Key Assumptions, Risks, and Issues	45 days	Mon 6/19/00	Fri 8/18/00	Team												
62	Draft Conceptual Design	47 days	Thu 6/22/00	Fri 8/25/00	Team												
63	Conduct Workshop(s) to Review Draft Conceptual De	48 days	Tue 6/27/00	Thu 8/31/00	Team												
64	Develop Technical Design	95 days	Fri 4/21/00	Thu 8/31/00	Team												
65	Identify Future Technical Requirements	81 days	Fri 4/21/00	Fri 8/11/00	Team												
66	Define Scope for To Be Environment (including time fr	40 days	Mon 6/19/00	Fri 8/11/00	Team												
67	Define System Changes	45 days	Mon 6/19/00	Fri 8/18/00	Team												
68	Define Technical Architecture	45 days	Mon 6/19/00	Fri 8/18/00	Team												
69	Define Interface Requirements Support Needs	45 days	Mon 6/19/00	Fri 8/18/00	Team												
70	Identify Key Assumptions, Risks, and Issues	45 days	Mon 6/19/00	Fri 8/18/00	Team												
71	Draft Technical Design	47 days	Thu 6/22/00	Fri 8/25/00	Team												
72	Conduct Workshop(s) To Review Draft Technical Des	48 days	Tue 6/27/00	Thu 8/31/00	Team												
73	Develop Business Case	56 days	Wed 6/28/00	Wed 9/13/00	Team												
74	Finalize Costs	46 days	Wed 7/5/00	Wed 9/6/00	Team												
75	Finalize Benefits	46 days	Wed 7/5/00	Wed 9/6/00	Team												
76	Evaluate Costs and Benefits	51 days	Wed 6/28/00	Wed 9/6/00	Team												
77	Determine High Level Implementation Schedule	51 days	Wed 6/28/00	Wed 9/6/00	Team												
78	Draft Business Case	51 days	Fri 6/30/00	Fri 9/8/00	Team												
79	Conduct Workshop(s) to Review Draft Business Case	51 days	Wed 7/5/00	Wed 9/13/00	Team												
80	Finalize Conceptual Design/Technical Design/Busines	56 days	Fri 7/14/00	Fri 9/29/00	Team												
81	Complete Draft	49 days	Fri 7/14/00	Wed 9/20/00	Team												
82	Conduct Conceptual Design/Technical Design/Busine	47 days	Thu 7/20/00	Fri 9/22/00	Team												
83	Finalize and Deliver Conceptual Design/Technical De	36 days	Fri 8/11/00	Fri 9/29/00	Team												
84	Project Management and Program Support (on-going)	135 days	Mon 3/27/00	Fri 9/29/00	Team												
85	Report Project Status and Issues	135 days	Mon 3/27/00	Fri 9/29/00	Team												
86	Identify, Escalate, and Resolve Issues	135 days	Mon 3/27/00	Fri 9/29/00	Team												
87	Identify and Complete Action Items	135 days	Mon 3/27/00	Fri 9/29/00	Team												
88	Track and Provide Deliverable Status	135 days	Mon 3/27/00	Fri 9/29/00	Team												
89	Prepare and Distribute Weekly Status Report Package	135 days	Mon 3/27/00	Fri 9/29/00	Team												
90	Conduct Key Meetings	135 days	Mon 3/27/00	Fri 9/29/00	Team												
91	Plan and Schedule Meetings	135 days	Mon 3/27/00	Fri 9/29/00	Team												
92	Prepare Meeting Agenda	135 days	Mon 3/27/00	Fri 9/29/00	Team												
93	Prepare and Distribute Meeting Minutes	135 days	Mon 3/27/00	Fri 9/29/00	Team												
94	Conduct Meeting Follow-Up (as needed)	135 days	Mon 3/27/00	Fri 9/29/00	Team												
95	Maintain Workplan for Analysis and Design Phase	135 days	Mon 3/27/00	Fri 9/29/00	Team												
96	Update Workplan on a Weekly Basis	135 days	Mon 3/27/00	Fri 9/29/00	Team												

