Final Graded Case Study: Project Management Plan, Hightower Global Solutions

Project Selection and Initiation

After having been recently laid off from his job of 35 years as a Sales Manager at Hightower Global Solutions, Tony DiBello got a call from his former boss Peter McKenzie asking him to return to the organization to help get a new initiative off the ground.

The Project

Based on McKenzie's brief description over the phone, DiBello understood that the project was to develop a "sales training intranet" (code named HighLEARN) for Hightower's 350 geographically dispersed sales associates. A Fortune 500 firm specializing in financial services technology and outsourcing solutions, Hightower had more than 100 complex products and services to offer its diverse client base of banks, mutual fund complexes and insurance companies. In addition, Hightower's executive leadership was pursuing an aggressive acquisition strategy, buying small companies and further expanding the product portfolio. As a result, both new and experienced sales associates were struggling to get up to speed on all of the Hightower offerings, and sales leadership was concerned that they were missing opportunities to pitch new products to clients. McKenzie, the Head of Hightower's Sales organization, had become an evangelist for what he called "Blended Learning"—combining traditional classroom training with online learning opportunities—and he was determined to develop a highly interactive "portal" to help improve sales performance. He envisioned a custom intranet where Hightower sales associates across the globe could log on to get comprehensive product information and presentations, access webinars and videos with product specialists, and share tips and feedback through blogs, forums and social features.

McKenzie's enthusiasm for the intranet project was infectious. Even Carol Bailey, Hightower's CEO, had come to believe that connecting people in this way was critical to ensuring Hightower's success and sustainability in the global market. Due to the breadth and diversity of the company's product offerings—and the rate at which they were acquiring new products—there was immense pressure on everyone in the sales organization to become experts on as many products and services as possible in order to meet aggressive sales targets.

To support the CEO's strategic agenda, the following project elements, team members, and constraints were provided.

Project Budget and Roll-out Date	
Project Budget	$1.5 million
Project Scheduled to Start	June 1, 2017
HighLEARN Roll-out	January 1, 2018

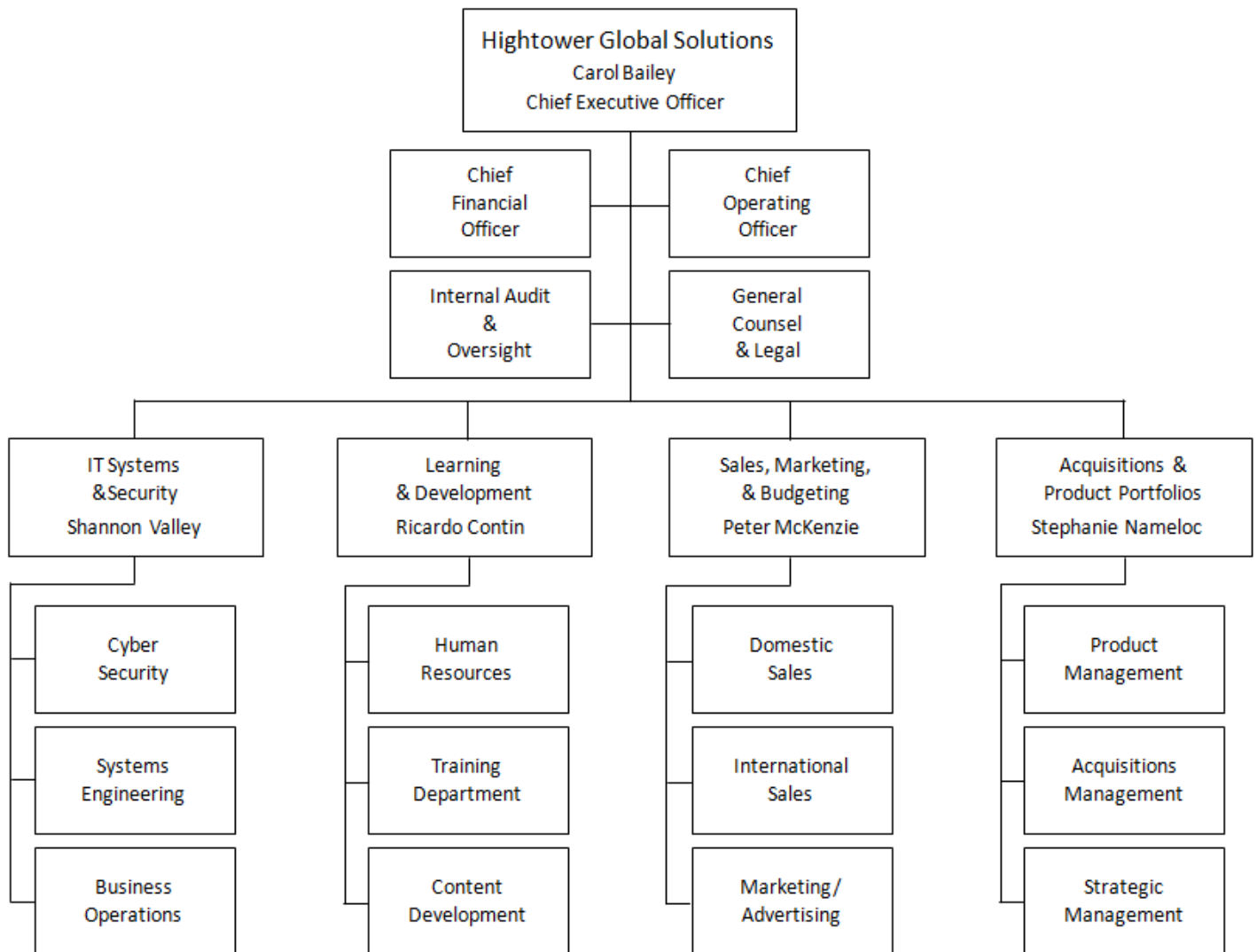| Project Team Members	
Name	**Role**
Ricardo Contin	Director of Learning and Development
Steve Quan	Hightower IT Operations Specialist
Shannon Valley	Hightower IT Systems and Security
Monica Ianucci	Content Specialist
Jonathan Brant	Content Specialist

	Initial Project Risks
1	Website does not meet user requirements or functionality.
2	Shannon Valley and Steve Quan are not available to contribute to the project until July 15, 2017.
3	Marketing department has not endorsed the approach; believes they should go with Microsoft® SharePoint® system.
4	Security of intranet/portal: no external access beyond firewall.

Project Activity	Duration
Portal Development	
User Interface Design Complete and Tested	2 days
Style Sheets for Portal	3 weeks
Theme Design for Website	8 weeks
Portal Administration Complete and Accepted	2 days
Administrative Page Groups	10 weeks
Administrative Access Control Design	7 weeks
Content Management & Coding Complete and Tested	2 days
Content Display from Repository	28 days
Content Upload and Functionality	8 weeks
Configure/Code Indexing and Functionality	13 weeks
Infrastructure and Security	
Architecture Approved for Implementation	1 day
Servers for Development, Staging, and Production	13 weeks
Configure Firewalls	4 weeks
Integrate Infrastructure and Security Systems	8 weeks
Log-in/Registration System Complete and Tested	3 days
Create Log-in/User Profiles	4 weeks
Content Creation and Editing	
Product Content Modules Completed and Accepted	5 days
Interviews with Subject Matter Experts (SMEs) and Sales Representatives	2 weeks

Product Sales Summaries	4 weeks
Sales Case Studies for Content Modules	7 weeks
Edit/Film SME Videos	1 week
Upload Presentations, Demos, and Webinars for Content Modules	2 weeks
Documentation	
Development and Document Coding Standards and Procedures	15 weeks
Develop Test Acceptance Plans and Procedures	15 weeks
HighLEARN Database Test and Acceptance	1 week
HighLEARN Roll-out	

Hightower Global Solutions Organizational Chart

Hightower Global Solutions Staffing List	
IT Systems and Security	
	• Harold Williams

Cyber Security	• Dennis Callahan • Beth Stroller
Systems Engineering	• Juan Felipe • Susan Xiao • Cheryl Bolden
Business Operations	• John Petrel • Steven Johnson • Steve Quan
Learning and Development	
Human Resources	• Christina Alston • Elizabeth Carol • Judy Wilson • Terrence Holober • Frederick Concern
Training Department	• Kimberly Contos • Nicholas Bergh • Tyler Burns • Dianne Harrison
Content Development	• Jonathan Brant • Monica Ianucci • Henry Stephenson
Sales, Marketing, and Budgeting	
Domestic Sales	• James Youngster • William Feller
International Sales	• Tracy Woodster • Andrew Levitt
Marketing/Advertising	• Sasha Fiercer • Jason Holdmeer
Acquisitions and Product Portfolios	
Product Management	• Meagan Golden • Melvin Simpson
Acquisitions Management	• Nicole Smith • Evelyn Lovelace
Strategic Management	• Richard Mattingly • Teresa Berry-Van Helbing

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