

Project Plan



mon K
patisserie



| | |
|------------------|---|
| Client: | mon K patisserie |
| Project Name: | mon K patisserie website migration and upgrade |
| Project Manager: | Oakley Smith, Content Manager and Writer at E&A Web Services |
| Synopsis: | The project will migrate mon K's existing website content to a new Content Management System (CMS) with greater functionality (Squarespace) and upgrade the site with new content (including new photography), an online ordering system for products and services, and an iteration of the site in French translation. |
| Version: | Initial version (1.0) |
| Issue Date: | March 10, 2022 |
| Distribution: | Mon and Mona Ki, owners of mon K patisserie |
| Prepared by: | Alexandra Hoare and Elissa Bronswyk, for E&A Web Services |
| Authorized by: | Mon and Mona Ki, owners of mon K patisserie |

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1. Introduction

1.1 Document Purpose

To outline the procedure and steps to successfully modify and expand upon the existing content of mon K patisserie's business website, and to migrate content from the site's current CMS (Wix) to a new one (Squarespace). The document will detail the project's scope, the approach and methods for content migration and creation, a communications and work plan, milestones to be achieved, the participants involved and the tasks to be allocated to and achieved by each, performance and metrics, and potential risks to be accounted for.

The document will serve as a project plan and outline for the project manager (also the content manager and writer) overseeing the project, for distribution to the other project team members (two members from E&A Web Services: a web designer and a UX designer and writer; two external contract team members: a photographer and a translator; and the client) to ensure compliance with and coordination across all migration and content creation channels and procedures.

1.2 Associated Documents

The project will require the following documents and information from the client:

- a detailed budget (to be drawn up in coordination with the project manager)
- a signed contract in agreement between the client and E&A Web Services
- a list of products and other items to be photographed
- a list of products and services to be identified on the site
- social media account links
- brand logos and other existing digital assets for inclusion on the website
- a menu and list of prices for all products and services to be identified on the site

E&A Web Services will require signed contracts from contract-based project team members (the photographer and translator).

1.3 Project Plan Maintenance

The project manager will be responsible for any updates or changes made to the project plan. The initial version of the project plan is version 1.0. Successive versions may be required if the post-launch audit reveals they are necessary, or if the client decides to revisit the site for future modification.

Minor updates to the current plan (version 1.0) will be recorded in status reports, to be drawn up in coordination between the team member initiating or requesting the change and the project manager and appended to the present document under section 1.3 (Project Plan Maintenance).

Any major changes to the project will require revising and reissuing a new plan, to be drawn up by the project manager in consultation with the client and in coordination with all members of the project team.

2. Project Scope

2.1 Outline of Project Objectives

2.1.1 Objectives

The project has three primary objectives:

1. To migrate existing website content—and significantly expand this content—in the creation of a new website that adequately supports the client's new business strategy and communications plan. The site will be hosted on a more robust CMS and will feature fresh, engaging, brand-specific and audience-targeted content that will help position the brand more effectively and in competition with major local and online competitors (such as Starbucks and Tim Hortons). The existing website insufficiently expresses the company's wish to establish and promote a unique brand identity, to represent the diversity of its products and services, to support the needs of existing customers, and to actively seek out and engage new ones.
2. To embed new forms of functionality into the new website that better service the client's business and communication needs, including an online ordering system for products, a blog, social media links, iterations of the site's content in French translation, and a special events page.
3. To ensure compliance with the Web Content Accessibility Guideline (WCAG) requirements.

2.1.2 Success Criteria

The project's success will be measured by:

- the project's delivery and launch on time and on budget
- the client's satisfaction with the final website, provided via post-launch feedback
- customer satisfaction with the final website, provided via post-launch feedback

2.1.3. Risks

The project's principal risks are data preservation, resource availability, budgetary requirements, and scope management. These risks are outlined in greater detail under section 8.1, below, where additional provisions for mitigation and contingency strategies and potential impacts of each risk are addressed.

2.2 Definitive scope statement

The project's scope includes:

1. Needs assessment: a clear identification and documentation of the client's needs for their new website based on interviews with the client prior to finalizing the Project Plan.
2. Migration of existing content to the new CMS platform and the creation of new content.
3. Creation and launch of new functionalities within the new CMS platform (online ordering, a blog, French translations, special events).
4. Ensuring WCAG compliance.

3. Project Approach

3.1 Project Lifecycle Processes

E&A Web Services will undertake the project in **seven** phases:

1. **due diligence phase:** needs assessment, and comparison of the source and destination CMSs (Wix and Squarespace), to determine how existing and new content will best fit within the destination system; obtaining client input and customer feedback on the existing site; identifying client objectives for new CMS platform; conducting an initial audit of existing content.
2. **planning phase:** drawing up the migration and content creation plan, including budget, timelines, deliverables, and task allocations to each team member; creating a maintenance schedule; client sign-off will be required at the end of this phase
3. **migration preparation phase:** backing up existing data (including retention of original site)
4. **build phase:** defining and designing the content migration and content creation: defining the target audience, building the new website, modifying any existing content (as necessary) and creating new content, including new photography and translations of finalized content into French for the translated iterations of the site's content; backing up new content
5. **pre-launch phase:** analysis and testing (including UX and compatibility testing) of the new website
6. **launch phase:** dry run and launch of the new website
7. **post-launch phase:** post-implementation review and project close out

The Project Scope (below) outlines each phase of the project in greater detail.

3.2 Organization

3.2.1 Project Team

The project team includes five resources:

| | |
|-------------------|---|
| Oakley Smith | Project Manager, Content Manager & Writer |
| Alexandra Hoare | Web designer |
| Elissa Bronswyk | User Experience (UX) designer & writer |
| Marie-Philip Dion | Translator |
| Wyatt Smith | Photographer |

The content migration and creation project will include a project manager (content manager and writer), a web designer, a UX designer and writer, a translator, a photographer, and the client.

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The project manager (content manager and writer) will be responsible for overseeing the project in its entirety, including coordinating the team members involved, communicating with the client, and transferring existing content and creating new content.

The web designer will be responsible for creating the structure of the new website, using Squarespace.

The UX designer and writer will be responsible for coordinating with the content manager and writer on the creation of new content, ensuring the website and its content meets user experience requirements (including WCAG compliance), and conducting UX testing prior to the launch of the new website.

The translator will be responsible for translating the existing and new content into French.

The photographer will be responsible for creating new photography of the client's business and products for inclusion on the new site.

The client will be responsible for keeping in contact with the content manager and writer and providing any feedback when requested.

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4. Communications Plan

| Who (stakeholder) | What info do they need | Why do they need it | When will they get it | How will they get it |
|---|--|--|---|--|
| Client: mon K patisserie | Regular updates on the project's progress Notification about any new budgetary requirements | For reassurance of the project's success as integral to their business strategy | Frequently and throughout the project | Weekly Status Report |
| Customers | Awareness of the new website, the improvements, and when the new site is coming | The improvements in the new website will give them more access to mon K's goods | Initial announcement in Phase 1, with frequent updates throughout the project | Announcement on the current website Postings on Instagram In-store signage |
| Project manager, Content manager and writer | Awareness of all moving parts Information from all team members about any progress, emerging problems, scope changes | To be able to manage the project efficiently and effectively | Frequently and throughout the project | Weekly Status Report, team meetings, and ad-hoc communications from team and client |
| Web designer | Input and updates from team content creators (Content Writer, Translator, Photographer, UX designer) for effective design of the new site and migration of existing content | To ensure the layout and design of the new site will meet the project's requirements | Phases 1, 2, 3, 4 | Project plan and Weekly Status Report Team meetings and emails |
| UX designer and writer | Description of the target audience, digital assets, photos | To design layout and functionality | Phases 1 and 4 | Project plan and Weekly Status Report Team meetings and emails |
| Translator | Content to be translated | To complete the translation for upload to the new website | Phase 4 | Project plan and Weekly Status Report Team meetings and emails |
| Photographer | Client input on the photos they want on their new website Dates and times when the photographer can access the store and its products Themes and content planned for the new website | To be able to effectively plan for and take new photography | Phases 1 and 4 | Project plan and Weekly Status Report Team meetings and emails |

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5. Work Plan

5.1 Work Breakdown Structure

| Project Phase | Focus | Specific Tasks |
|---------------|--|--|
| 1 | Assessment and comparison of CMSs; solicitation of client and customer feedback; audit of existing content | <ul style="list-style-type: none"> exploring, assessing, and comparing the source and destination CMSs (Wix and Squarespace), to determine how existing and new content will best fit within the destination system conducting an audit of existing content to determine what needs to be migrated and what can be removed and/or replaced with new content soliciting customer and client feedback on the content and features of the existing site (what doesn't work, what the client's and customers' specific needs are, and how the new site can address these) |
| 2 | Planning | <p>Drawing up the migration and content creation plan, including:</p> <ul style="list-style-type: none"> budget (to be determined in coordination with the client) project timeline and schedule of tasks (including work plan, communications plan, milestones, and maintenance schedule) list of deliverables tasks to be allocated to each team member client sign-off on plan |
| 3 | Data backup | <ul style="list-style-type: none"> backing up existing data (Project Manager - both hard drive and cloud) retaining the original site (to be removed from public view once the new site is tested and launched) confirming data back-up is complete and correct |
| 4 | Design and content creation and backup | <p>Defining and designing the migration and content creation, including:</p> <ul style="list-style-type: none"> defining target audience building the new website modifying any existing content (as necessary) creating new content, including new photography finalizing new content and getting client sign-off translating finalized content into French for the translated iterations of the site's content backing up all new content (Project Manager - both hard drive and cloud) |
| 5 | Pre-launch analysis and testing | <p>Analysis and testing of the new website, prior to launch, including:</p> <ul style="list-style-type: none"> UX testing compatibility testing WCAG compliance customer and client feedback testing |
| 6 | Dry run and launch | <p>Launching the final website and conducting a dry run, to ensure that all features are running smoothly. The dry run will take place on a Monday (when the client's shop is closed), to allow for any adjustments to be made if needed and avoid disruption to the client's business.</p> |
| 7 | Post-launch | <ul style="list-style-type: none"> Present final status report to client Conduct post-implementation review: lessons learned, key success factors, client satisfaction survey Close-out project Identify next steps for the client |

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5.2 Resources

| | |
|-------------------|--|
| Oakley Smith | Oakley is a Project Manager, Content Manager & Writer. Oakley is PMP certified and has many years of experience in projects of all sizes and complexity. |
| Alexandra Hoare | Alex is the co-founder of E&A Web Services. She has 15 years of communications experience. |
| Elissa Bronswyk | Elissa is the co-founder of E&A Web Services. She has 15 years of UX design & writing experience. |
| Marie-Philip Dion | Marie-Philip is a professional translator with many years of experience in business writing translation. |
| Wyatt Smith | Wyatt is a professional photographer with a focus on providing exceptional photography for businesses. |

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6. Milestones

We will start the project on Monday, April 4. Implementation date will be Friday, May 20.

Week 1: Monday, April 4 to Friday, April 8

Week 2: Monday, April 11 to Thursday, April 14 (Good Friday)

Week 3: Tuesday, April 19 to Friday, April 22 (Easter Monday)

Week 4: Monday, April 25 to Friday, April 29

Week 5: Monday, May 2 to Friday, May 6

Week 6: Monday, May 9 to Friday, May 13

Week 7: Monday, May 16 to Friday, May 20

| Milestone number | Title | Forecast date |
|------------------|--|----------------|
| 1 | Initial project payment from client | April 8 |
| 2 | Customer and client feedback on existing content | April 14 |
| 3 | Client sign-off on the migration and content-creation plan | April 14 |
| 4 | Backing up existing data | April 14 |
| 5 | Mid-point project payment from client | April 29 |
| 6 | Building the new website (including WCAG compliance) | May 6 |
| 7 | Client sign-off on new content | May 6 |
| 8 | Pre-launch analysis and testing | Monday, May 16 |
| 9 | Final website launch | Friday, May 20 |
| 10 | Final project payment from client | May 27 |

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7. Performance and Metrics

For Project Management:

| Metric | How collected | Used for |
|---|----------------------|--|
| Milestones achieved, missed, at risk (timeline) | Weekly status report | Project Management and Change Requests |
| Financials - on plan or over plan (budget) | Financial report | Project Management and Change Requests |
| Deliverables achieved, missed, at risk (scope) | Weekly status report | Project Management and Change Requests |

For implementation:

| Metric | How collected | Used for |
|---|---------------|----------------------|
| UAT - # of variances opened, closed, unresolved | UAT reports | Go or no-go decision |
| UAT - # unresolved & severity (High/Med/Low) | UAT reports | Go or no-go decision |
| New website - responsiveness and load testing | UAT reports | Go or no-go decision |

For post-implementation review:

| Metric | How collected | Used for |
|---|---|--|
| Client satisfaction | Client feedback - in person | Did we meet their needs; adjust E&A service delivery in future |
| Customer satisfaction - new content look-and-feel | Customer feedback - in person and on Instagram | Did we meet their needs; to identify next steps for client |
| Customer adoption of new functionality (# online orders) | Customer orders - monitor for 4 weeks post-implementation | Determining if any changes are needed to next release |
| Squarespace metrics - bounce rate | Squarespace analytics | Determining if any changes are needed to next release |
| Instagram - # new likes, comments, etc related to the new website | Instagram | Determining if any changes are needed to next release |

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8. Risks, Constraints, Assumptions

8.1 Risks

| Risk Id. | Risk Description | Mitigation Plan (what to do to avoid the risk occurring) | Contingency Plan (what to do if the risk occurs) | Impact (what the impact will be to the project if the risk occurs) | Likelihood of occurrence (e.g., %, or high / medium / low) |
|----------|---|--|---|--|--|
| 1 | Data loss | Data will be backed up at an early stage of the project. Existing data will be backed up in Phase 3 (prior to any modifications), and new data will be backed up both at the point of creation (Phase 4) and at the end of Phase 5. | There is not a lot of existing data to be migrated. If data is lost, it can be replaced, with some impact to timelines and budget. Impact would need to be assessed and reviewed in collaboration with the client. | Low | Low |
| 2 | Resource availability or functionality (including hardware, software, and project team members) | Additional hardware will be secured at the start of the project, as a backup should any failures occur mid-process. Both the Project Manager and the Web Designer will maintain backups of the Squarespace account, one on a hard drive and one in the cloud. Project team members will sign a contract to secure commitment to the project. | Relevant team member(s) will be granted access to any backup hardware or software. If the primary account is jeopardized, the project will default to the Project Manager's backup and then (if needed) the Web Designer's backup. E&A Web Services will identify optional personnel for each of the team members to call upon if needed. | High Disruption or loss could unravel the project. | Low |
| 3 | Exceeding the project budget | The project manager will carefully and regularly monitor all expenditures throughout the project to ensure costs remain within the budget. Weekly Project Status Report will include budget tracking. | Discuss with clients at weekly status meetings to discuss options: increase budget or reduce scope. | Medium The client has provided us with 10% contingency funding, but beyond this 10%, funding is not available. Scope would have to be reduced. | Low |
| 4 | Scope creep | Change request process. All out-of-scope items will be assessed for impact on timelines and budget, and client approval to proceed will be obtained. | Immediately contact the client if scope increases too much for the team to handle within timelines and budget. Discuss mitigation options with clients. | Extend timelines and/or increase budget. | Low |

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8.2 Constraints

Financial: the project is required to adhere to a strict budget. The client is a small, family-run company. The client has provided a 10% contingency budget, but beyond this 10%, the scope would have to be reduced.

Access to clients: there may be times when access to the clients is limited due to their business cycle.

Implementation timing: the new platform can not be implemented during mon K's busiest seasons (Christmas and Easter). Additionally, mon K is closed for the month of August so this closure must be considered in the planning phase.

8.3 Assumptions

The construction of this plan assumes the following conditions:

- that the client is satisfied with the service and products that E&A Web Services and its team provide
- that the client will pay project payments in a timely manner
- that resources will be both available and reliable throughout the project
- that the team will assemble a robust and comprehensive project plan
- that team members will undertake assigned tasks in a timely manner
- that the client will be flexible should any changes be needed

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9 APPENDICES

9.1 Appendix 1 - Project Status Report

E&A Web Services will provide a weekly status report to mon K and the project team every Friday.

Mon K website project – Weekly Status Report

| |
|------------------|
| Week Ending |
| Date: MM/DD/YYYY |

Project Summary

Weekly Update

Risks & Mitigants

| Key Milestones / Deliverables | | | | | |
|-------------------------------|-------|------------|----------|----------------|-----------|
| Milestone | Owner | Start Date | End Date | Prior End Date | Status |
| | | | | | Completed |
| | | | | | Completed |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
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| | | | | | |

| Change Log | Date approved | Approved by |
|------------|---------------|-------------|
| | | |
| | | |
| | | |

Done On Track At risk Will be missed

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9.2. Appendix 2 - Change Request Form

E&A Web Services will use a Change Request Form to document proposed changes, assess impact, and get approval from mon K.

Mon K website project – Change Request Form

| |
|------------------|
| Week Ending |
| Date: MM/DD/YYYY |

Change Request – Description of change being proposed

| Change Log | Date approved | Approved by |
|------------|---------------|-------------|
| CR 1 | | |
| CR 2 | | |
| CR 3 | | |

Change Request – Assessment of impact on scope, budget, and/or timeline

Approved by

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9.3 Appendix 3 - Preliminary ideas for new content

A preliminary list of new content ideas:

Mon K website project – Preliminary ideas for new content

New content

- About Us page
- All products to be featured (currently only some products are featured)
- More photos – store, people, and products
- Hours – and seasonal hours (and their August closure)
- Improve branding – logo, colours, fonts
- Special events page
- Partnerships page – store next door to bakery, high school (EYCI) and hospital (MG)
- We're hiring

New functionality

- Online ordering
- French translation
- Link to Instagram