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## The role of the Product Manager and its application in Excellence Innovation projects.

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Alla mia Regina, costantemente nel mio cuore. Oggi mi manchi, domani pure.

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#### Chapter 1

In this first part of the elaborate, the role of the Product Manager will be discussed. The goal is to initially examine the concept from a theoretical perspective and then analyze its application within Excellence Innovation company projects.

#### 1.1 Product Manager

The product manager is responsible for a product throughout its Product Life Cycle (PLC): from market launch to production release. His main task is to define the business objectives related to a given product and the most effective marketing strategies to achieve them.

His or her main objective is to offer customers a unique product in terms of quality and features that stands out from competitors, coordinating the various teams involved in the design, production, promotion, and sale of the product.

In other words, the PM is the "CEO of a product" or a product line.

The most distinguishing element of this professional figure is the support he or she provides toward the activities inherent in business processes, IT development and user experience (UX).

According to Martin Eriksson's line of thought, product management is "the intersection between business, technology, and user experience."



Figure 1. PM's areas of responsibility A Product Manager

On the Business side, the PM must focus on optimizing the product and, by doing so, maximizing the business value.

To achieve this, they must communicate successfully with developers, customers, and stakeholders, being the point of connection between them.

On the Technology side, Product Managers are directly involved with the development of their products, they should understand how a product is built and how the technology works.

This is especially important in agile projects where the PM spends most of the time with developers.

Of course, there's no need to code, but it's important that a PM knows what is happening in order to make the best decisions.

On the User Experience side, The Product Manager is responsible for connecting users and the company as it should be. In fact, it's common to say that they advocate in favor of the customer because they represent their interests.

Consequently, they must understand the concepts of Usability and UX Design.

Again, it's not necessary to be an expert in UX, but it's essential to know the user in-depth, their needs and pain points, to build the best possible product for them.

A Product Manager doesn't have to be an expert in all three fields. However, it's indispensable to master at least one of them. Depending on their specific area of expertise, the Product Manager profile might vary between:

- Technologist: This profile is profoundly technical and focuses on solutions based on technology. As a result, they are the perfect fit for back-end platforms or complex B2B products.
- Generalist: This profile is business savvy with technical knowledge. Their main focus is user delight, so it makes sense to put them in charge of B2C products or front-end for B2B products. Generalists can drive end-user metrics.
- Business-oriented: These Product Managers have a business background, and their focus is to maximize specific business metrics. They are a perfect fit for B2C products with another source for creative inputs.

#### 1.1.1 Product Manager Responsibilities

The specific responsibilities of a PM vary depending on the size of the company.

In larger organizations, Product Managers are placed in teams of specialists. Researchers, analysts, and marketers gather input, while developers and designers handle everything from day-to-day execution, testing prototypes, working out designs, and finding bugs. In this case, PMs have more support, but they take longer to align the specific vision of stakeholders.

In smaller organizations, the role of the Product Manager is different; more time is spent doing hands-on work and less time getting stakeholders to agree.

In general, a good PM has the following responsibilities:

- Prioritizing product functions and features.
- Defining a vision for a product.
- Aligning stakeholders with the product vision.
- Monitor the market and develop competitive analyses.
- Study consumer preferences and needs.

• Evaluate sales data of related products and monitor competitors' offerings.

#### 1.1.2 Differences between Product Manager and Project Manager

To begin with, it is useful to distinguish the two concepts from which the two roles are named, product and project:

Product is what we provide to a group of users. It can be anything, a physical product, digital or a service.

Project is a plan consisting of a series of activities with an a priori defined outcome, a start date, and a deadline. The project is finished when the result is achieved.

They are two different concepts but cannot exist separately.

The product represents the strategic dimension; the project reflects the tactical dimension. The Project Manager is responsible for the project, the responsibilities of this figure, consist of managing the strategy and guiding the development of the product. The Product Manager follows the management and measurement of the product even after its development, defines requirements, does market research.

The two professionals, especially in large companies, deal with different areas.

Areas of responsibility of the Product Manager:

- Strategy.
- Release of software versions.
- Conceptualization.
- Functionality.
- Market launch planning.
- Training within the organization.
- Profit and loss.

Project Manager's areas of responsibility:

- Budgeting.
- Plan execution.
- Resource allocation.
- Capacity planning.

- Organization among teams.
- Troubleshooting.
- Updating on progress.

In small companies and startups, the responsibilities, and areas of expertise of the two roles may overlap.

#### 1.2 Types of Product Manager Approaches

"For about four decades, companies operating around the world tried to create a single methodology that could be used to manage all types of projects, regardless of their characteristics. Unfortunately, however, executives soon began to realize that each type of project had to be managed differently" (Kerzner, 2019).

The quote highlights the fact that to this day there are several different approaches used by Product Managers to manage projects. Projects have different characteristics from each other, which gives rise to the need to implement different solutions that give more control to the PM figure. The following will look in detail at the two most widely used and related types of approaches for this study: the traditional (or waterfall) approach and the agile approach.



Figure 2. Agile vs Waterfall

#### 1.2.1 The waterfall approach

The waterfall approach is a project management model that stresses a straight line from start to finish. This technique, which is frequently employed by engineers, is designed to rely on meticulous planning, extensive documentation, and sequential execution. The Waterfall technique, also known as the Waterfall model, is a sequential development process that falls like a waterfall through all stages of a project (for example, analysis, design, programming, and testing), with each phase entirely winding up before moving on to the next.

The Waterfall technique is a sequential procedure that operates with predetermined dates, requirements, and outputs. Individual execution teams are not required to be in continual touch using this strategy, and are normally self-contained until particular integrations are necessary.

Team members also operate autonomously and are not required to make progress reports as frequently as in the Agile model. Typically, one phase does not begin until the preceding one has been completed.



Figure 3. The Waterfall Method

#### Requirements

The Waterfall technique is based on the assumption that all project requirements can be acquired and understood in advance. The Project Manager makes every effort to gain a thorough knowledge of the project sponsor's needs. Written requirements, which are often contained in a single document, are used to specify each step of the project, including expenses, assumptions, risks, dependencies, success indicators, and completion timeframes.

#### Design

Here, software developers provide a technical solution to the challenges outlined in the product specifications, such as scenarios, layouts, and data models. First, a higher-level or logical design that explains the project's objective and scope, the overall traffic flow of each component, and the interconnection points is produced. After that, it is converted into a physical design utilizing specialized hardware and software technologies.

#### Implementation

When the design is finished, technical execution begins. Because meticulous study and design have already been completed, this may be the quickest step of the Waterfall process. During this phase, programmers write applications based on project requirements and specifications, with some testing and implementation thrown in for good measure. If considerable modifications are required during this stage, it may be necessary to return to the design step.

#### Testing

Before a product is distributed to clients, it must be tested to guarantee that there are no problems and that all criteria have been met, resulting in a positive user experience with the program. The Product Manager's design papers, personas, and user case scenarios will be used by the testing team to develop test cases.

#### Maintenance

The maintenance phase occurs once the program has been deployed in the market or delivered to clients. As bugs are discovered and user requests for changes are received, a team will be formed to handle updates and the delivery of new versions of the program.

The Waterfall technique is a simple, well-defined project management system with a track record of success. Because the requirements are well defined from the start, each contributor understands what needs to be done when and can efficiently arrange their time for the course of the project.

The Waterfall technique also has the following advantages:

- Developers can catch design errors during the analysis and design stages, helping them to avoid writing faulty code during the implementation phase.
- The total cost of the project can be accurately estimated, as can the timeline, after the requirements have been defined.
- With the structured approach, it is easier to measure progress according to clearly defined milestones.
- Developers who join the project in progress can easily get up to speed because everything they need to know should be in the requirements document.
- Customers aren't always adding new requirements to the project, delaying production.

As with any growth process, strengths in one area may indicate shortcomings in another. Because of the Waterfall methodology's emphasis on upfront project planning and commitment to a certain specified progress, it is less adaptable, or agile, later in the game. Changes made later in the process can be time-consuming, difficult, and expensive.

Other reasons why the Waterfall process might not work are:

- Projects can take longer to deliver with this chronological approach than with an iterative one, such as the Agile method.
- Clients often don't fully know what they want at the front end, opening the door to requests for changes and new features later in the process when they're harder to accommodate.

- Clients are not involved in the design and implementation stages.
- Deadline creep when one phase in the process is delayed, all the other phases are delayed.

#### 1.2.2 Agile approach

"A project management strategy that fosters a collaborative, iterative, and incremental approach to project management is known as agile methodology."

It is described as nimble since it anticipates both your original demands and those caused by future modifications.

This innovative project management technique was developed first for software development testing and originated at a period when the failure rate of IT projects was exceptionally high. Popular linear and predictable cascade-like approaches of the time, such as the Waterfall method or the V-cycle, allowed little opportunity for contingencies or modification.

As a result, groups were presented with the tunnel effect. They discovered issues or that the product did not (or no longer) match expectations too late.

This often goes hand in hand with late delivery or an overspent budget.

The application of this method has five major benefits:

1. Improved quality

Using an agile technique, teams may divide projects into sprints and cooperate to produce high-quality outputs.

This strategy enables teams to deal with common project issues such as cost management, scope creep, and failing to meet deadlines.

Furthermore, each work has a testing phase that helps teams to discover and resolve difficulties promptly in order to minimize any long-term negative implications.

#### 2. Speed and flexibility

The second advantage of embracing agile is the speed and flexibility provided by the Scrum methodology.

Change is important to the growth of this activity. If the initial objectives are not met, the methodology and methods are instantly modified to suit the new requirements.

Scrum was developed first for software development teams and their technical tasks. However, it may now be utilized for a wide range of applications, particularly in marketing.

Scrum is a popular agile strategy because it is simple to implement. Furthermore, it is empirically grounded, allowing self-organizations to accommodate changes as your project expands.

3. Complete visibility of the progress of each project in real-time

Another advantage of employing an agile strategy is the transparency of each project as a result of regular client interactions. This gives customers a sense of involvement and allows them to request adjustments throughout the project.

Furthermore, the teams engaged may display the customer their progress as well as the hurdles they have faced.

This builds trust and collaboration between the team and the client, which may lead to increased customer satisfaction and commercial value.

4. Stakeholders engagement

The engagement of stakeholders in project completion is a critical component of employing an agile technique.

You will establish a dynamic system based on the trust and confidence of each team member and forge deeper connections within your teams by interacting with diverse stakeholders during each step of the project.

It is recommended that stakeholders participate actively in the project's progress in order to employ this strategy effectively. This will allow them to ensure that activities are executed in accordance with the plan and to make modifications as needed.

#### 5. Cost management

An agile technique can also help with cost containment. When making future decisions, the team evaluates the budget after each stage. Then they decide whether to continue, halt, or terminate tasks, or even the entire project.

This is an important aspect of project management because it helps teams to easily grasp the expenses of each feature, which will subsequently be taken into consideration when making strategic decisions.

Although there are several benefits to employing an agile approach, there are a few drawbacks to consider before implementing one:

- It can be difficult to predict efforts such as cost, time, and resources at the beginning of the project
- It can be difficult to measure progress since agile methods deliver in increments
- It can be difficult to implement since people naturally resist changes
- Teams can get sidetracked if they don't see any progress



Figure 4. Agile Method

#### 1.3 Stages of software development

This paragraph was developed with the intention of analyzing the many stages of software development in order to make clear the contributions, key activities, and most glaring criticisms made by the previously elaborated figure of the Product Manager.

The relationship between the tasks and activities carried out by such a professional figure and the size of the company in which the project is being developed is unquestionably a fundamental principle that deserves to be demonstrated. Considering the foregoing, it is significant to note that within a small-scale business environment, the Product Manager engages in more specialized activities, gaining greater verticality in comparison to the business functions in which he is inserted.

In every situation, from small businesses to larger ones, it's possible to mention areas related to IT development, business development, and design that can be considered as part of the decision-making process.

It is possible to define the following process steps for software development:

- Analysis.
- Planning (Design).
- Implementation.
- Testing.
- Production Release.
- Maturity/ Maintenance.



Figure 5. Stages of software development



Figure 6. Project phases

The analysis carried out during this first phase allows for a preliminary investigation of the product's characteristics and the related feasibility study so that the final outcome can correspond to the client's expectations. It is possible to identify common macro-activities across all software projects in this first stage. In this regard, it is essential to conduct an analysis of the project's feasibility through which the features, costs, and final results requested by the client are assessed.

Implementing the process for defining KPIs (Key Performance Indicator) is a crucial and strategic function of this work. The goal is to identify performance metrics that are in line with the project before the product's ideation phase, and then to determine in later phases whether the solution has been implemented correctly and in accordance with the initial goals. The end product that needs to be implemented determines which KPIs should be chosen.

The Product Manager has a view, in this phase, of a strategic type and, looking at the overall life of the product, will have to establish the metrics to be analyzed then in the later stages of development up to the steady-state phase.

Despite the fact that the previously stated activities may be carried out effectively, the Product Manager's contribution is primarily based on their wealth of experience. For example, if he/she is able to recognize the unique characteristics of the product in the business, design and IT development area, he/she will be able to recognize the key performance indicators (KPI) and define them. It is possible to demonstrate that one of the biggest problems with choosing KPIs for mature products is that it is necessary to take into account possible trade - off, even strong ones, during the planning stage. It is also important to consider the fact that at the beginning of the product's life, there will not be much data on which to run simulations until a few years.

In addition, a multidisciplinary Product Manager with experience is essential for setting boundaries and identifying possible compromises with various stakeholders on requests that are difficult to fulfill within the budget, time, costs, and goal planned by the stakeholders themselves. The best management of external relations leads to significant benefit also from the point of view of both reputation and business development, characteristics that are nowadays fundamental.

From an initial requirements management well set up and conducted, it is fair to expect:

- The establishment of an effective communication channel between Project and Stakeholders.
- The definition of an agreement between Customer and Supplier on the requirements of the supply.
- The definition of a mechanism for managing changes to the requirements of the supply.



Figure 7. Project phases

The objective of this phase is to define and describe in detail the characteristics of the project's information system. Starting from the output of the analysis phase, which must be very precise, the design phase defines the operational instructions necessary to implement the project.

Planning is then composed of all the activities necessary to identify the best implementation solution with respect to the functional objectives. These activities can be divided functionally, technically and design-wise, they can also be carried out at different times and in different ways depending on the approach taken, but in general, they help designers and development teams make important decisions.

A very important role at this stage is that of the prototype created by the designers. The creation of an application prototype can help in clarifying the contrast between the user's needs and the proposed solution. Deciding on the practice of prototyping is an important issue: while it is true that the cost of a prototype is generally not insignificant compared to total costs, it is also true that the benefits on the project are really many.

The prototype can have different analysis objectives:

- The external prototype is a user-oriented product that at the level of the application interface is very close to the final product, with the only difference being that behind the interface there is no logic application.
- The internal prototype is a product made to simulate the technological architecture.

Prototypes, therefore, allow experimentation and selection of the most suitable for the project.

Because this is a multidisciplinary phase, the figure of the Product Manager is crucial for coordinating the different business functions.

Of fundamental importance is to identify the tasks capable of translating the customer's requirements into processes to be implemented, while simultaneously meeting the objectives, in terms of time, cost and expected goals.

To achieve the phase objectives, the PM will need to:

- Effectively communicate to the resources involved the vision of the project.
- Facilitate the professional development of Team Members.
- Ensure product quality.
- Effectively communicate to stakeholders the status of the project.
- Stay the course toward the goals (only the required work will be accomplished).

In the execution phase, the PM's leadership skills emerge; in fact, he or she must Manage the turbulent project environment and in particular:

- The working group with its dynamics.
- The client with its constant requests for changes.
- Management with its pressures to meet deadlines and cost containment.
- The suppliers with their deliveries and related contractual requirements.
- Internal and external conflicts.

The Product Manager must make targeted choices, applying a logic of overall product vision, looking not only at the achievement of final results in the short term, but taking into account a time horizon beyond the product launch. This will bring considerable flexibility on the design and development side, which is particularly useful in order to be able to implement product changes requested by the customer, if there is a change in requirements or if the result does not correspond to what was agreed upon in the previous phase (Analysis).

All this is possible and achievable, only if one has the skills to be able to get into the problems of each business function, thus identifying compromises and solutions to limit future incompatibilities.



Figure 8. Division of the planning phase

#### 1.3.3 Implementation



Figure 9. Project phases

The phase after planning is implementation; it aims to meet the functional specifications required by the customer. It includes all the activities that one or more specialized people within the team (developer) perform to create an application or program, writing the related code.

During this phase, the Product Manager must plan the resources needed, the front-end and back-end development time, the professionals involved, and the associated costs. At this stage, the use of the Agile method allows for effective management of the process and enables rapid sharing to all resources involved. The final product is broken down into multiple deliverables, called sprints, with the goal of prioritizing implementation activities.

It is good to keep in mind that, in case of changes in requirements or changes in the product, improper management can compromise the work done in the previous phases, even going to impact the User Experience level.

Examples of critical issues that can occur at this stage due to improper project management can be:

- The development team implemented features that were not consistent with the client's expectations and requirements.
- Poor communication between business functions leading to suboptimal results.
- Lack of coordination between the previous phases (Analysis and Planning), due to the lack of a trained figure capable of organizing.



Figure 10. Project phases

The objective of this phase is to verify and validate to what extent the product that was previously implemented fully meets the requirements of the end customer and that its operation conforms to all the specifications that were established in the analysis phase. The Product Manager in this phase has the objective of verifying the actual behavior of the program against the expected behavior and reporting any differences in performance that emerge to the programmers, who must then proceed to eliminate those differences. The infrastructure used in this phase is called the "testing environment", aimed at assessing correctness against the specification.

The testing methodology identifies the following phases:

- Test Planning.
- Test Preparation/ Development.
- Test Execution.
- Defect Management.
- Test Monitoring and Reporting.

Once the previously listed phases have been carried out, if the test is successful, is possible to move on to the subsequent phase (Production Release); otherwise, start again from the first phase (Test Planning).

#### 1.3.5 Production Release



After the Testing phase, having reached a sufficient level of quality, the program can finally enter production.

This term acquires different meanings depending on the program being produced:

- For programs that are intended for sale to the public this phase represents the release to the market, which can be physical, virtual (eCommerce) or mobile.
- For little program made for a specific client, this phase presents the installation and testing at the client's site.
- For web applications, the phase represents installation and testing on one or more web servers.

Depending on the complexity of the product, not all product functionality are released at the same time.

Therefore, the Product Manager must schedule the phased release in accordance with the principles of the chosen methodology.

At the end of this phase, programs begin to have their own operational life.
#### 1.3.6 Maturity/Maintenance



Figure 12. Project phases

During the operational life, there may be a need for corrective or update interventions on programs, involving new design, implementation and testing phases. Such corrective interventions can be grouped into two distinct families:

1. Routine maintenance, the set of corrective interventions required because of errors that have escaped testing or due to the operation of the program under conditions not anticipated during its design.

2. Evolutionary maintenance, the set of interventions to change or enrich program functions due to new operational needs of the program itself; an example is the continuous updating of management programs to stay up-to-date with respect to tax regulations. In general, however, every program during its life is subject to evolutionary and corrective interventions. Only a small percentage of programs are left untouched after release.

# Chapter 2

The purpose of this chapter is to describe all the steps necessary to map the As - Is situation of a company and then subsequently map the To - Be situation after proposing changes to improve project management. This is necessary because in the next chapter the As - Is situation of the Excellence Innovation company will be mapped.

# 2.1 What is As-Is process analysis

An "as is" business process defines the current state of the business process in a organization. Typically, the analysis goal in putting together the current state process is to clarify exactly how the business process works today, kinks and all.

Current state analysis can focus on an entire business organization or on one or more specific processes within a department or team.

There are several key goals or motivations for implementing current state analysis, including:

- Saving money.
- Improving existing processes or creating new processes.
- Increasing customer satisfaction.
- Improving business coordination and organizational responsiveness.
- Complying with new regulatory standards.
- Adapting processes following a merger or acquisition.

### 2.1.1 Benefit of analyzing As-Is process

The main advantage of As-Is process analysis is creating a solid foundation in an organization's processes. As-Is analysis allows a business to evaluate the current state of its processes and identify opportunities for improvement.

Without this fundamental information, it is difficult to manage and improve processes. In other words, if you don't know where you're starting from, you'll have a hard time getting to where you want to be.

By conducting current state and future state process reports, businesses can also expect to:

- Creating a solid foundation of the organization's processes.
- Aligning operations with overall business strategy.
- Improving operational efficiency, process communication, and training.
- Increasing control and consistency across the organization.
- Gain competitive edge.

# 2.1.2 Steps of As-Is process analysis

As-Is process analysis includes three major phases: investigation, documentation, and analysis.

# 1. Research

To obtain a complete analysis of an organization's current state, a panoramic view of its products and primary activities is required.

To begin, a list of all products and services must be compiled in order to provide a clear picture of the company's value. As a result, identify and organize all of the processes used by the company to generate such products and services at all levels. (Some processes may occur concurrently.)

Be sure to note when each process starts and ends and identify which teams or individuals are involved in (or responsible for) those processes.

Stakeholders and higher-level managers can help with the general outlines, but to create a complete and accurate report you need to get in touch with the people who directly execute and oversee each process.

There are several ways to gather the necessary information:

#### Personal interviews

Interview stakeholders who execute each process, as well as managers or other subject matter experts involved in the process. Personal reports can confirm processes that are working well (or not) and illuminate steps in the process that you would otherwise be unaware of.

However, although personal interviews are valuable, interview more people (if possible) to get a more complete picture of the process. Be careful not to draw conclusions based solely on one person's account.

### Direct observation

In addition to interviewing people in the field, take time to directly observe processes in action. Take note of the people involved at each stage, as well as the systemic support functions and resources available and/or used.

#### Surveys

Send surveys or questionnaires to process participants to collect formal written responses. Surveys will allow you to ask specific questions that may not be answered by observation or interviews.

Surveys also provide an opportunity to obtain feedback from participants and answers to questions that arose during other information-gathering tactics (such as observation).

#### Group meetings

Finally, consider holding a group meeting among interested stakeholders to outline processes and confirm previous findings with process participants.

The goal is to meet several times to document the process together. These meetings can be best scheduled after other research (e.g., interviews and observations) has been completed, because you can outline everything learned and then work with participants to identify any gaps and confirm findings.

# 2. Document

Once the information on the processes has been gathered, it is necessary to clearly capture this information in a process map.

The Business Process Model and Notation (also known as BPMN) is used by the majority of process owners to diagram current state processes. The BPMN is a standard process modeling system designed to simplify process documentation and make it easily understandable to all stakeholders. The best practices in the industry recommend using the current BPMN 2.0 process notation.

Depending on the kind of process or diagram, the process map should capture all of the process's inputs, system support functions, detailed descriptions of the process's execution, and all of the process's outputs.

3. Identifying gaps, bottlenecks, and weak points

Before creating a representation of the future state, a thorough examination of the current state is required. Analyze current processes and seek the following outcomes:

#### Bottlenecks

Determine the stall points in processes and the causes that trigger them. A bottleneck might be represented by a large number of meetings or people involved in an approval procedure.

#### Gaps

Identify any gaps in the process that obstruct desired performance and outcomes. For example, it may be necessary to add another stage to the procedure or take a different character.

#### Weaknesses

It is possible to possess the proper procedure, but the flaws of the existing method must be identified.

After identifying the flaws in the current process, you may start planning for the future and determining how to improve it. As a result, it is necessary to project the future situation, ensuring a smooth transition from "As-Is" process mapping to "To-Be" management.

#### 2.1.3 From As-Is to To-Be

When evaluating business processes, it is necessary to analyze current and future state processes. In simple terms, the "As-Is" phase describes the current state of the processes, whereas the "To-Be" phase describes the desired state.

The "As-Is" phase defines the current state of the processes as well as any gaps or issues related to the current mode of operation. Once these points have been identified, we may proceed to the next phase of process management.

The mapping of future processes documents the perspective that will be given to the process. Using the diagram As-Is, the team collaborates with interested parties to develop improvements to the current process and record such changes on the future map. Stakeholders can quickly visualize current state documents thanks to the BPMN diagram.

Table 1. Differences between As-Is and To-Be

As-Is Process Mapping	To-Be Process Mapping		
The As-Is analysis maps where your processes	To-Be analysis maps where you want them to		
are.	be.		
The As-Is phase outlines the current state of	The To-Be process mapping documents how		
your process and any gaps or issues with your	you want your processes to be like.		
current mode of operation.			
Use the As-Is document to work with	The To-Be analysis is used as a guide for		
stakeholders to develop improvements.	implementing changes in the process.		

# 2.1.4 What are the goals of As Is/To Be

While AS IS process mapping has the advantage of assisting the team in precisely visualizing organizational processes as well as risk areas, TO BE process mapping has the advantage of simulating the effect of future process modifications before they are implemented.

Remember that the AS IS/TO BE tool should concentrate on maturing the process such that, at the conclusion of the TO BE stage, it is:

Increasingly committed to the organization's strategic objectives in order to simplify and improve the efficacy of processes and operations, whether strategic or operational. To attain these goals, all participants must be involved and engaged, and there must be a daily focus on continual growth, as well as the adoption of an efficient Process Management solution.

# Chapter 3

This chapter, starting with a brief description of the Excellence Consulting company, has the objective of creating a flowchart of the company's process, thus mapping it's As-Is solution. Before arriving at the final flowchart, all project development phases for Excellence Innovation will be explained one by one, mentioning all the figures involved in each of them.

### 3.1 Excellence Consulting

The Excellence group was founded in Milan in 2007.

In complex areas such as financial institutions, Excellence effectively supports clients in all phases of the life cycle of products and services offered to the market, helping them to achieve maximum competitive advantage in Customer Care and Customer Operations, through the development of multichannel platforms and the optimization of operational performance. The company supports the launch of new products and services, the development of prospect acquisition campaigns, and the definition of customer retention initiatives.

Its focus is Financial Institutions, it specializes from advising top management in the banking, insurance and asset management sectors.

Excellence guides its clients to innovation and a positioning always one step ahead of competitors.

#### 3.1.1 Excellence Innovation

Excellence Innovation is the Agile Fintech of the Excellence Group.

It develops Software Solutions that combine our specialized skills in Finance, Design and Software Developers, putting the end user at the center, from the concept phase to the realization of the finished product.

Thanks to their specialization, it has the opportunity to conceive, define in detail and implement Web and Mobile applications for the largest Italian clients in the industry, often on areas that have not yet been touched by digital innovation. Excellence Innovation's products bring innovation and help the digitization of areas and processes, including Customer Relationship Management, Productivity and Operations, and Directional and Operational Intelligence.

3.1.2 Excellence Innovation Services

Solutions "as a Service".

Their SaaS solutions are platforms already adopted by some of the primary Banks in the financial world and are born from decades of experience and the work of a multidisciplinary Business + Design + Development team with an Agile approach.

The SaaS service allows the customer to delegate the management of the solution on his behalf to the external provider. In fact, the customer uses the application in an easy way, accessing it through credentials, delegating aspects such as infrastructure and Software maintenance, support, and security to Excellence Innovation.

User Experience Design.

Excellence Innovation uses certified, market-leading approaches to build tools that bring value to their clients. It adopts a Lean design approach based on the practices of Human Centered Design, a design methodology that puts human needs at the center.

The company's approach covers all phases of Concept, UX Research, Interaction and Interface (UI) Design and is driven by precise objectives:

- Identify customer process improvement needs and opportunities, turning them into measurable metrics.
- Increase customers' productivity and consequently their operational efficiency, in terms of reducing the time and cost of specific activities.
- Create tools that are easier to understand and use, thereby reducing training and support costs.
- Increase the usability and functionality of applications by enabling accessibility to more types of users.

# Rapid Prototyping.

From idea to prototype, Excellence Innovation keeps the process strictly collaborative between customers and Developers - Designers through continuous discussion for constant prototype redefinition as long as all requirements have been met.

Rapid prototype preparation through close collaboration with customers is guided by the following goals:

- Create products tailored to the customer's needs through their feedback obtained during the testing phase.
- Make changes to the product more quickly given the articulation of the process into phases and the symbiotic work between Developers and Designers.
- Get results faster and save on resources by adapting the process to the most sustainable solutions.
- Reduce risks from change requests during the programming phase since the solution has already been submitted to the user in previous phases.

Predictive analytics and business intelligence.

Through data reprocessing, visualization activities and specialized reporting, provides their clients with a comprehensive view of data regarding their organization's activities in accordance with specific business objectives and KPIs. This data enables them to make strategic decisions, stimulate changes, eliminate inefficiencies, and discover new market opportunities. 3.2 Role of the Product Manager within Excellence Innovation

The Product Manager within Excellence Innovation is responsible for several activities that fall into four main categories:

1 Setting vision and strategy

Includes all activities that set the strategic vision for the entire product lifecycle through iterations that are based on hard data and through planning by objectives.

Through Strategic Planning activities are prioritized, establishing what is most important for product realization.

This includes the creation and control of the Product Roadmap, the timeline that details all phases of work.

#### 2 Connect and Communicate

This category includes the management and organizational aspects that affect both stakeholders and the implementation team. In fact, interpersonal skills are one of the most important characteristics a Product Manager must possess.

The PM to create effective relationships and coordinate their team members must seek to unbalance a one-to-one relationship with each person, helping each figure understand how their role is critical and contributes to the broader product vision, trying to keep all teams as interconnected as possible by leading alignment meetings with the different realization areas.

#### 3 Discover and Analyze

These are the activities pertaining to the iterative analysis of the market in which the product fits, its usage data, target users and KPIs at various levels.

They are the analyses of product performance, interviews and product testing sessions with users, market research and competitor analysis useful to consolidate the evolutionary path of the product itself.

#### 4 Document and Decide

These are the activities to consolidate the product evolutionary roadmap, starting with the insights from the analysis activities, to share them and make them understandable to key stakeholders and guide strategic decisions about the product, again combining business, design and technological objectives, requirements and constraints.

3.2.1 Product Manager and key stakeholder relationships

Within Excellence Innovation, multidisciplinary approach is omnipresent in every moment of Software's life.

During the product creation process, several people are involved, the main figures being: Designer, Software Developers, Product Manager and Client.

The Product Manager must then interface and coordinate multidisciplinary project teams, while maintaining relationships with the customer and any internal and external stakeholders.

Taking the Agile process as a reference, we illustrate what are the points of contact between PM and the main figures involved.

Product Manager & Designer

Very often the two figures overlap during the process; the skills of Designers are applied at all stages of product development, Product Managers are also always present, guiding the organization and the process. The work of both figures is based on understanding the customer's needs; the Designer is responsible for the quality and integrity of the developed solution while the PM is responsible for organizing the whole process.

Product Manager & Software Developers

The Product Manager must have a good technical and technological knowledge base to be able to interface with the development side but also to create effective solutions for the client. Of considerable importance at this stage is the gathering of technical requirements; a good PM must ensure that Developers have all the information they need to be able to implement the product.

Product Manager & Client

The Product Manager relates to external and internal figures in the project. Externally, he/she relates to stakeholders and customers, trying to build an effective relationship in order to succeed in meeting the needs of end users, while also mediating with internal company resources. Relationship management skills are therefore indispensable for coordinating external and internal people and achieving a common goal.

In summary, a Product Manager, to be successful in his role, must have a lot of direct experience interfacing with the various figures mentioned above, but at an appropriate level of depth.

In doing so, he or she is able to absorb the specifics of the product he or she governs, making flexible choices toward the product itself, the end users, and at the same time on the development team.

# 3.3 Stages of developing a project in Excellence Innovation

The process of developing a Software in Excellence Innovation consists in the following phases: Analysis, Planning (Design), Implementation, Testing, Production Release, and Maturity/Maintenance.

The goal is to analyze and examine each phase individually, paying attention to the role played by the key figures within the company: Product Manager, Designer, Software Developers, and the Client.

The main roles played by each member, thanks to which it was possible to manage and conclude the project, will be analyzed.

This analysis will lead to the creation of the As-Is diagram for the Excellence Innovation company.



Figure 13. Project phases

# 3.3.1 Analysis

The main and most important part of this phase is defining the objectives and gathering the customer's needs. Excellence Innovation develops the Software based initially on an existing product and then goes on to customize it according to the client's requirements, thus using not project but product logic.

The development of the Software is based entirely on the customization of an existing product, the client is then guided in the choice of functions to be implemented, to try not to create incompatibilities with the basic elements already present.

The Product Manager's role is to manage these incompatibilities, trying to prevent them from occurring, by coordinating the client and the company's internal functions in order to find an optimal solution for both parties.

During this phase, to implement this concept, Excellence Innovation presents a demonstration application that is very basic, but inclusive of all the elements that may be of interest to the client, thus trying to reduce customizations, minimizing additional requests from the client. The goal is precisely to support and guide the client by preventing them from choosing to implement a product that deviates greatly from the existing one.

This strategy has brought benefits from several points of view:

- From a time perspective it has reduced the additional effort.
- From an economic point of view, it has reduced design and implementation activities.

Customers often do not possess technical knowledge to create a priori solutions to a problem, so it is the figure of the Product Manager who must deal with this. At this stage, the PM must consider and analyze all the critical issues that may occur throughout the life of the product being developed, right from the design phase, designing solutions applicable to all business functions.

It should also be specified that in this and all other phases of the project, Excellence Innovation team members use Slack to informally communicate with each other. Slack is a digital environment where several channels are created, one for each project, and placed in each only the team members working on that particular project. For meetings, on the other hand, with both internal and external users, Microsoft Teams is used.



Figure 14. Slack example

### 3.3.2 Planning (Design)

This phase is based on the customer's needs and requisites, gathered during the previous phase.

The subsequent step is to transform the customer's requirements into real functionality. To do this, it is necessary to start with the basic application and then customize it according to what was agreed upon previously.

Meetings between the client and figures from the different functional areas are of considerable importance for this phase, because this is where the logic of Software operation is defined, which will then be implemented in the subsequent phase. To support this activity, Designers create a prototype (Excellence Innovation uses Figma as a tool for designing and prototyping its interfaces), to be shown to the client, to show how the final product might turn out. It is a hands-on model of the Software with the purpose of analyzing multiple features and identifying any critical issues, allowing time to market to be reduced by being able to intervene with significant changes to the model before the Software design reaches advanced steps. The prototype is the implementation base for the development area, it is a design that contains the basic elements, so as not to distract the customer with outline elements.

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Figure 15. Figma

Next, the functional analysis is implemented where the logic of Software operation is written in detail.

The functionalities of this document are:

- Define definitively the logics to be validated by the customer before the subsequent phase (Implementation).
- Support Designers and Software Developers in all successive phases.
- Possession by the company of proof of assurance that the activities to be implemented are those desired by the client.
- Uniquely assigning implementation activities to Software Developers.

The customer, after viewing the document, gives his approval, approving all the customizations he has requested.

The customer's validation of this functional analysis provides the company with a guarantee, avoiding the need to perform the same activities several times, thus bringing Excellence Innovation a time and cost advantage.

The last activity that is carried out within this phase is to organize the kick-off meeting (KOM).

The goal of the meeting is for the Product Manager and all team members of the company to meet to plan the subsequent phases in detail. This meeting affects the implementation of the project, as all roles are involved, and may raise concerns about the different operational phases.

During the meeting, the main issues that are raised are:

- Time required for project implementation.
- Deadlines to be met.
- Problems and risks that may occur in subsequent phases.
- Creating ad hoc solutions for possible risks.

At the end of the KOM, the Project Manager formally initiates for project implementation.



Figure 16. Example kickoff presentation

# 3.3.3 Implementation

The Product Manager in this phase must coordinate the front-end and back-end activities by correctly assigning to the figures involved the activities to be performed. Front-end activities are all those that involve the elements that are visible to the customer's eyes; back-end activities are all those that are behind the Software application and that the customer does not see.

The PM has to check the consistency between the solution designed in the Planning (prototype) phase and the functionality that the Software Developers are developing, and the consistency of what the customers have approved with the functional analysis so as to avoid objections during the product release phase.

A critical aspect of this phase is the possible changes that may occur; it may happen that one of the functionalities previously defined by the Designers is not practically feasible by the Developers. In this case the Product Manager comes into play, who must stable alternative solutions to solve these critical issues. In this case, if these changes take place, the client will have to re-approve what has been modified.

Excellence Innovation in this phase to support the coordination between the Software Developers figures and the Project Manager uses the Jira application.

The reference PM inserts within the application the tasks to be carried out by the Software Developers subsequently, each task is moved to the various sections according to the progress of its resolution:

- As soon as the task is entered, it will fall into the "To be completed" column because it has yet to be taken care of.
- During the implementation phase the task is moved to the "In Progress" column.
- In the implementation phase it will be in the "Developed" column.
- When the correct solution of the anomaly is being verified it will be in the "In test" column.
- At the end, if everything is complete, the task is placed in the "Complete" column.

The use of this application at this stage has brought significant benefits from both the economic point of view, due to the resolution of problems in limited time and with less effort, but also from the management side, reducing the complexity of the tasks to be managed.

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Figure 17. Jira Software example

In the implementation phase, the Product Manager begins scheduling SALs, periodic meetings, usually monthly, that are intended to check the project's progress against its goals.



Figure 18. Example SAL presentation

# 3.3.4 Testing

Excellence Innovation manages its projects mainly in three development environments:

- 1. Development environment, in which Software Developers carry out all the activities involved in the implementation of the Software.
- 2. Demo environment, which can only be accessed by a limited number of users to test the proper functioning of the Software. It is within this environment that Excellence Innovation conducts its internal testing before release to the customer.
- 3. Production environment, this environment is created by Software Developers, they create a copy of the demo environment, and make it available to the customer.



Figure 19. Excellence Innovation environments

Every release, anomaly, bug, or activity in testing follows these three environments cyclically.

Of considerable importance is the figure of the Project Manager in this phase. She or he, after testing all functionality within the demo environment, must define Test Cases, documents that have mainly the following objectives:

- Create a list of physical tests in order to verify that the final product being delivered to the customer is free of bugs, errors or anomalies.
- To provide complete documentation to the client to test the finished application and accept that the features designed by the Software Developers have been implemented correctly.

Excellence Innovation drafted the document by compiling an Excel spreadsheet in which all the scenarios that the various tests have are entered.

Each test is characterized by the indication of the section in which to perform it, the functionality to be tested with its detail, by whom it was performed and when. The last two columns deal with the outcome of the test and any notes if needed.

Ele	nco casistiche di To	est da prevedere					
Nr.	Sezione	Funzionalità da verificare	Dettaglio verifica	Svolto da	Data svolgimento	Esito	Note
1							
2							
3							
4							
5							
6							
7							
8							
9							

Figure 20. Example of Test Case

This document is therefore useful both to the client and entirely to the company. It guides the client during the first navigations on the platform, simplifying the Change Management process and at the same time, the PM conducts tests in order to correct any errors present in the application before releasing it to the client. The communication channel that is used to notify anomalies between the people involved is always Jira

#### 3.3.5 Production release

As explained earlier, the product is released to the customer in the production environment after it has been tested internally.

It is then at this stage that the test cases prepared by the PM during the testing phase are delivered to the customer.

Depending on the complexity of the project and the number of features to be implemented, it is possible that the product may not be released entirely at once, but the Product Manager may have to schedule several release phases.

During this phase, the Software operating manual is released to the customer. This is a document, the result of experimentation, that is intended to explain all the features of the Software to the users who will use it.

### 3.3.6 Maintenance

During the life of the product released to the customer, it is possible that corrective or intervention activities may be required on the program.

Interventions may be made for needs of a different nature:

- Customer Change Request.
- Security incidents.
- Interventions to ensure business continuity.
- Information security interventions.

The customer Change Request process is the most common; its steps will be briefly described below.

Step 1: Activation

The customer at this stage may experience anomalies but may also request the company to implement new evolutions.

In either case, the process is triggered by notification of a problem or requirement via a support e-mail address. Depending on the nature, the notification may include the following information.

For alleged anomalies:

- Date and time when the user report occurred.
- Snapshot of the screen.
- Actions taken at the occurrence of the report.

For evolving:

- Description of the new feature to be implemented.
- Any supporting details.
- In case of multiple evolutions, indicate a priority scale.

# Step2: Evaluation

Upon receipt of the request Excellence Innovation will have to:

- Perform an initial assessment of the report by classifying it into: blocking anomaly, non-blocking anomaly, or evolving anomaly.
- Subsequently perform in-depth technical analysis.

Phase 3: Development/implementation of the change

This phase is adopted following the approval of the Business Manager, the figures involved will carry out the following activities:

- Modify the Software code according to the report.
- Internal testing of the development environment in order to verify proper operation.
- Schedule with the customer the release of the change to enable the customer to verify that the anomaly is resolved.

Step4: Release of the change

The modification is released, in the demo environment, to users enabled to access Excellence Innovation resources.

Step5: Verification and validation

The client, with any end users, tests the modification to see if:

- The need matches the requirements.
- There are no negative impacts on the current infrastructure (on previously released Software).

Phase6: Transport to production

The change is also implemented on the Production environment.

Step7: Closing of the change

Once the release to production has been made, the relevant PM should notify the customer that the release to production has been made.

# 3.4 Excellence Innovation's As-Is process

Having described all the Excellence Innovation project phases and the corresponding actors involved in each, it is now possible to map the company's As-Is process. Mapping an As-Is process is all about understanding and clarifying how things work today. The Business Process Modeling Notation (BPMN) diagram is used to visualize the current situation of Excellence Innovation. It is a flowcharting method that models from start to finish the stages of a planned business process. It is a key element of business process management, visually illustrating a detailed sequence of business activities and information flows required to complete a process.

BPMN uses these individual elements for business process diagrams:

#### Events

An event that starts, changes, or completes a process. They are represented by circles containing other symbols based on the type of event.



#### Activities

A particular activity or operation performed by a person or system. It is represented by a rectangle with rounded corners. They can become more detailed with subprocesses, loops, offsets, and multiple instances.



Gateway

Decision point that can shape the path based on conditions or events. They are represented as rhombuses. They can be exclusive or inclusive, parallel, complex or data or event based.



Sequential flow

Shows the order of activities to be performed. It is represented as a straight line with an arrow. It may depict a conditional flow or a predefined flow.



Message flow

Represents messages flowing between "pools" or boundaries of the organization, such as departments. It should not link events or activities within a pool. It is depicted by a dotted line with a circle at the beginning and an arrow at the end.



Pool and swimlane

A pool represents the main participants in a process. Another pool may be in a different company or department, but it is still involved in the process. The swimlanes within a pool show the activities and flow for a particular role or participant, defining who is responsible for which parts of the process.

Pool				
Lane	Lane			

# Artifact

Additional information inserted by developers to give the diagram the appropriate level of detail. There are two types of artifacts: data object or annotation.





# Chapter 4

After mapping the Excellence Innovation company's As-Is situation through the BPMN diagram, this chapter aims to look for useful solutions for the company to improve its current internal project management method. The To-Be solution will then be mapped.

### 4.1 Excellence Innovation To-Be situation

The discipline and techniques used by Product Managers, to date, are capable of solving many typical Project Management issues. However, the requirements of the various processes are constantly changing, for that reason, the need arises to modify and adapt the Project Manager's applications in response to these changes.

Certainly there is the issue of Covid-19 which has brought significant changes in business workflows. Methods of managing technology activities have been adapted to overpower the limitations that have been placed on companies during this period. Many activities that used to be carried out face-to-face are now carried out by technologies, which existed previously but were little used.

Excellence innovation, had to define new logic, new compared to the traditional approach. The changes impacted more on communication, between the various teams within the company. The issue was implemented through the use of new technologies: Microsoft Teams, Slack, Zoom.

During the last six months within the company, I had the opportunity, with the supervision of my PM of reference, to try to improve those problems that had occurred during the last years precisely because of Covid-19.

Since this was a small company, I had the possibility to relate to all the members of the various teams (PMs, Designers, Software Developers), this greatly facilitated the work because I was able to gather direct feedback from each member of the company.

It turned out that the company's main problem was not in the workflow from the start of the project to the delivery of the final product but lies in the communication applications used within the company.

In fact, the teams communicate with each other through a platform called Slack.

Slack is software that falls under the category of enterprise collaboration tools used to send messages instantly to team members.

One of Slack's features is the ability to organize team communication through specific channels, channels that can be accessible to the entire team or only certain members. It is also possible to communicate with the team through individual private chats or chats with two or more members.

During my experience, I noticed that the figures involved in the project very often exchanged documents on Slack, because sending turns out to be much faster, especially if the need arises during a meeting.

The problem is that the software saves such documents for a maximum of 90 days after which they are automatically deleted and then completely lost because there is no way to retrieve me.

The CEO of the company then asked for a solution that would go to solve the following problems:

- The first, concerns the permanent saving of all documents concerning the project.
- The second, concerns the fact that in recent months there had been a need to have a document/page, accessible to the CEO and all members involved, indicating the latest developments of the project and its progress.

My PM of reference and I, in the last few months of my internship within Excellence Innovation, tried to implement solutions that would solve the above problems.

To solve the first problem, we created within the Teams project pages a section called "Files" where inside we set up a hierarchy of folders where we put all the necessary documents.

The folders that were created are as follows:

- Brief
- Data uploaded to the tool
- Functional documents
- Materials delivered to the client
- Customer-supplied materials
- Presentations
- SAL

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		Dati caricati sul tool	July 28	Archivio Alice Di G					
		Documenti funzionali	July 28	Archivio Alice Di G					
		Materiale consegnato al cliente	July 28	Archivio Alice Di G					
		Materiali forniti da cliente	July 28	Archivio Alice Di G					
		Presentazioni	July 28	Archivio Alice Di G					
		SAL	July 28	Archivio Alice Di G					
	X	20220419_Bug tool reclutamento.xlsx	July 28	Archivio Alice Di G					
		Accordo AZB – Excellence Innovation Suit	July 28	Archivio Alice Di G					

Figure 21. Document folder structure

It is very important that the folder structure remains the same for all projects even if they are managed by different Product Managers. This is because if a PM takes over a project that has already started, previously followed by another Product Manager, knowing the folder structure will make searching for a particular document faster.

After the creation of this "Files" section, all members of the company started uploading documents into it, avoiding sending them to Slack, thus solving the first problem as well as saving documents.

The second problem arises from the fact that Excellence Innovation, during the past few years has started to manage more and more projects. The increase in the number of projects has complicated things for the company's CEO, making him unable to follow up directly and keep up with the latest developments in all projects.

A need also arose for the various Product Managers to note down in an orderly manner considerations/requirements and feedback received from the customer to keep track of every step taken from the beginning to the end of the project.

Thus, the need arose to have a document/page, for each project, that could be consulted not only by the CEO but by everyone in the company, to track the developments and progress of a particular project.

Therefore, my Product Manager of reference and I created a Sharepoint page, accessible from Teams with a fixed structure:

Project structure	Deadlines		
Focus points	Main events		
	Project contact persons		
Notes	Useful links		

Figure 22. SharePoint page structure example

On the left side of the page we find:

- Deadlines: where to enter upcoming deadlines so as not to forget them (they refer to releases agreed with the client).
- Main events: includes all the important meetings and main stages of the project not to forget.
- Project contact persons: is a list containing all the project contact persons on the client's side. It also contains client e-mails to contact them more quickly.

• Useful links: is a list containing all the links to access the three environments (Development environment, Demo environment, Production environment). It also contains the link to directly access the prototype created by the designers (Sigma) and the Jira link to monitor the progress of the Software Developers.

On the right side of the page, we find:

- Project Structure: contains the list of the various modules of the tool with indication of the current status and upcoming activities.
- Focus points: for each module of the tool in this section it is possible to note down the main points, both the ones already unmarked and the one yet to be unmarked, so as not to forget them.
- Notes: in this section the Product Manager or CEO can note down the main issues.
| A Cerca nel sito |            |                                       | 3nze                   | rogramma Passato  | Crea una riunione<br>Quando si aogiunge una | <ul> <li>riunione, viene<br/>visualizzata qui dove tutti<br/>possono vederla.</li> </ul> | Titolo della riunione<br>Lun 12:00<br>Posizione | Titolo della riunione       Lun 12:00       Posizione                       | cipali eventi | rogramma Passato | Crea una riunione<br>Quando si aggiunge una<br>riunione, viene<br>visualizzata qui dove tutti<br>possono vederla. | Titolo della riunione<br>Lun 12:00<br>Posizione | Titolo della riunione           Lun 12:00           Posizione |                                |
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|                  | Innovation | + Nuovo 🗸 🏟 Dettagli pagina 🔝 Analisi | Struttura progetto Sci | + Nuovo 🗸 🌐 Modifica nella visualizzazione a griglia 🤐 🐺 Tutti gli elementi < 🕡 🛚 🛛 | Modulo \vee Stato att 🗸 Prossime 🗸          |  |   | Benvenuto nel tuo nuovo elenco<br>Seleziona il pulsante Nuovo per iniziare. | Prin -        | ⊆  <br>          | Focus Point Visualizza tutto<br>+ Nuovo <   |   | ΣO  | Benvenuto nel tuo nuovo elenco |
| : SharePoint     | Excellence | Home page                             | Conversazioni          | Documenti   | Pagine                                      | Struttura progetto<br>Focus Point  | Annotazioni varie<br>Contenuto del sito         | Cestino<br>Modifica   |               |                  |   |   |   | Additional chat                |



## Biography

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