

# Project Closeout Report: Operations & Training Plan

Status: **Draft**

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|                  |                                                                                                                                                             |
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| Project Sponsor  | Operations Director                                                                                                                                         |
| Project Team     | Financial Analyst, Fulfillment Director, HR Specialist, Quality Assurance Tester, Customer Service Manager, IT Manager, Inventory Manager, Training Manager |
| Project Duration | March 1-September 6                                                                                                                                         |

## Executive Summary

This project aimed to establish operational systems and procedures for Office Green's new Plant Pals service. The team successfully developed a delivery plan, installed supply chain management software and equipment, and implemented an employee training program for the new service. Despite going slightly over budget, the project was completed within the scheduled timeline. The team faced fulfillment and customer satisfaction challenges and developed a plan of action to address these issues moving forward.

## Key Accomplishments

- Established plant delivery and logistics plan that brought delivery costs down by 50 cents per unit.
- Selected and installed supply chain management software and equipment, which helped speed up plant procurement and sourcing.
- Trained over 75% of employees before the service launch, boosting efficiency.
- Installed new software to manage incoming orders, making the ordering process more efficient.
- Sent test batches to customers to refine product quality and delivery protocols.
- Ran an ongoing customer survey to gather information on customer satisfaction.
- Implemented feedback from customer surveys, increasing on-time deliveries by 10% and satisfaction with customer service by more than 42%.
- Implemented operations for Plant Pals service launch, creating a stable revenue stream.

## Lessons Learned

### ***What went well?***

- The plant delivery and logistics plan, once properly implemented, bringing down costs.
- The training program effectively educated 75% of employees about the new service procedures and standards, which boosted efficiency.

### ***What went wrong? How did we resolve the issue?***

- The team incorrectly potted 10% of the plants because there were no agreed-upon protocols. We addressed this issue by standardizing potting protocols.
- On-time deliveries increased from 80% to 90% during the test launch by hiring more drivers and reassessing delivery routes.
- Customer service had issues with the software, making it difficult for them to handle customer complaints. The IT Specialist resolved the issue quickly, which increased customer satisfaction.

### **Open Items**

- Continue to improve delivery processes to hit our 95% on-time target.
- Continue to monitor results for additional improvements.

### **Next Steps and Future Considerations**

- Schedule more delivery drivers for earlier shifts to meet customers' preferred delivery window.
- Ensure planting and delivery procedures are aligned with company standards.
- Allocate more resources to customer support to minimize complaints.
- Create an ongoing training schedule for employees on best practices for product quality, delivery, and customer satisfaction.

### **Project Timeline**

|                   |                                                                     |
|-------------------|---------------------------------------------------------------------|
| March 1-April 9   | Established a plant delivery and logistics plan                     |
| April 12-April 30 | Selected & installed supply chain management software and equipment |
| May 3-June 11     | Trained over 75% of employees before sending out test batches       |
| June 10-15        | Installed software to manage incoming orders                        |
| June 21-August 16 | Sent test batches to customers                                      |
| June 21-July 19   | Conducted a customer satisfaction survey                            |
| July 5-July 30    | Implemented feedback from customer satisfaction survey              |
| September 6       | Implemented internal operations for the official service launch     |

## Resources and Project Archive

- [Project Plan](#)
- [ROAM Analysis](#)
- [Status Report](#)
- [Escalation Email](#)
- [Presentation of Customer Feedback](#)
- [Meeting Agenda](#)