

UNIVERSIDAD PARA LA COOPERACIÓN INTERNACIONAL (UCI)

Project Management Plan for Santo Pan Bakery

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**APPROVAL PAGE**

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This Final Graduation Project was approved by the University as  
partial fulfillment of the requirements to opt for the  
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## DEDICATION

*I dedicate my final graduation project to all the women who have supported me throughout my life, especially my mother and grandmother, my everything.*

## **ACKNOWLEDGMENTS**

*Thanks to Marta C., SPO, who was always willing to attend meetings, respond questions, and to be open for suggestions.*

*Mr. Fabio Muñoz, my tutor, who guided me through all the research and provided feedback in every section. And God for giving me the opportunity of studying and continuing to have a professional growth.*

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## ABBREVIATIONS AND ACRONYMS

**AAR:** After action review

**CMP:** Communication management plan

**COMP:** Cost management plan

**CPM:** Critical path method

**FGP:** Final graduation project

**I:** Impact

**P:** Probability

**PC:** Project charter

**PM:** Project manager

**PCMP:** Procurement management plan

**PMP:** Project management plan

**PSM:** Project scope management

**PYMES:** Pequeñas y medianas empresas (Small and medium businesses)

**QMP:** Quality management plan

**REMP:** Resource management plan

**RMP:** Risk management plan

**SCMP:** Scope management plan

**SCHMP:** Schedule management plan

**SMP:** Stakeholder management plan

**SP:** Santo Pan

**SPB:** SP bakery

**SPO:** SP owners

**WBS:** Work breakdown structure

**WW:** Work week

## EXECUTIVE SUMMARY

A year ago, given the need to find a new source of income, the idea to start an enterprise that would take quality bakery and pastry products at an accessible price for customers was generated. This is how Santo Pan was born in 2020 when Marta and Ademar's family decided to open a store located in La Uruca, Costa Rica.

The creation of small and medium-sized companies in Costa Rica has been increasing little by little in recent years, thereby increasing Santo Pan direct and indirect competition, which is why it is important for the company to have a clear plan for project management and its different areas (knowledge areas) in order to easily detect improvements that can be made to make the business more efficient, reduce possible risks, among others.

Costa Rica is a country susceptible to change in any of its approaches due to its development condition. For this reason, companies are not exempt from suffering consequences, which is why the better the investigation and prevention is, the lower the risk and its repercussions are.

The final graduation project general objective was the development of a Project Management Plan for Santo Pan Bakery in order to manage the opening of a new store based in Costa Rica. The specific objectives were to develop the Project Charter in order to combine and coordinate the project activities, to create the Project Scope Management to ensure all work required is included in the project, to define the Schedule Management Plan to manage the timely completion of the project, to create a Cost Management Plan to ensure the project is within the budget, to generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations, to create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project, to develop a Communication Management Plan to ensure transparency and efficiency during the process, to develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks, to generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project, and to create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project.

The methodology used for the project used primary and secondary sources, which were interviews, The PMBOK Guide and Internet research. Santo Pan Bakery Project Management Plan provided a documented, organized, and clear methodology for a new small business in Costa Rica, highlighting that any small, medium, or big project should be managed with the same level of importance.

The results of the Project Management Plan showed the importance of planning every area involved in a project. The Project Charter provided an overview of the project and let the definition of the Scope Management Plan establish the activities required to achieve the results by three levels. Once identified, a Schedule Management Plan was developed to provide guidance on the baseline vs the actual project status; those activities had a cost, which is the reason why a Cost Management Plan was created in order to ensure the project was within the budget.

Quality is key on a business focused on gastronomy as Santo Pan; that's why a Quality Management Plan that integrates different quality areas as cleaning, supplies, human resources, among others was generated to ensure the expectations. Resources make the difference in a successful project. A Resource Management Plan was created in order to identify the staff needed to complete the tasks and goals; it included the documentation of staff acquisition, training, and recognition and a reward system. When managing people, communication is a pillar; a Communication Management Plan was developed focused on both internal and external approaches. Risk mitigation is key to every project. A Risk Management Plan was developed; it includes the identification of potential risks as well as its response plan. Santo Pan has several products acquired through suppliers for which a Procurement Management Plan was generated where the due process of acquisition of goods or services was documented and the final section was the management of stakeholders, for which a Stakeholder Management Plan was created to identify them, set responsibilities, and understand their level on impact and interest on the project

The Santo Pan Project Management Plan conclusion is holistic; it integrates different areas as one. In the first place, mapping risks allows to be better prepared but not risk-free, in order for a proper documentation of processes and excellent resource management (staff, budget, supplies, etc.) to take great relevance in the process of any Project Management Plan. In addition, if due controls of those efforts are not carried out with clear communication between stakeholders, the result will not be as expected. To define this result, clear roles and responsibilities must be established, as well as a realistic schedule that shows the status of the project, so that, as with the controls, it is easy to identify anomalies.

It is recommended that Santo Pan follow the control procedures, don't assume the project is risk free, invest in their employees and their growth, maintain an open communication with the stakeholders in order make them feel involved in the project, and consider having a time budget buffer in case of changes. No project is 100% risk-free. During this year, companies worldwide face the problem of the COVID-19 pandemic, which, no doubt, none of them expected. This is why a company must carry out a Project Management Plan to prepare in the best way for new challenges or even decide if it's not the best moment to invest.

## CHAPTER I. INTRODUCTION

### 1.1. Background

Baking is one of the oldest activities that have been carried out over the years, specifically since prehistoric times when human beings stopped being nomadic and became sedentary by introducing the cultivation and feeding of cereals in their lives. Nowadays, many things have changed, from the type of ingredients used, the creation of industrial ovens, or even small utensils to add something «extra» to the details of the bread.

SP is a new bakery and pastry shop in Costa Rica. It seeks to offer its customers the best quality products from baguettes, «Trenzas», sweet cookies, cakes, coffee, soda, eggs, among others.

SP started from an entrepreneurial idea that seeks not only to provide the best pastry and bakery in the area but also to offer a warm and enjoyable space to anyone who approaches the place. While the bakery does not have a previous story, its owners are ready to write their story for many more years.

### 1.2. Statement of the Problem

SP is a new local business that seeks to provide all its customers with the best quality bread and pastries in the area. Being a new entrepreneurship project, the owners do not have previous experience handling the logistics necessary to create the bakery; that is why a PMP will be developed in order to initiate operations in an efficient and structured way.

### 1.3. Purpose

In Costa Rica, the mortality percentage in the first 3 years of PYMES incorporation is 80%, which is why the development of a project management plan is critical for its good performance and to avoid being one of the mortality percentages in the country.

To develop a project management plan for a new bakery in Costa Rica called SP, an organized document that includes key aspects of the project is highly important. Those key aspects include the process groups: initiation, to define the

new project and obtain the permissions required; planning, to define the scope, objectives, and sequence of activities to achieve the objectives; execution of the activities defined; monitoring and controlling, in order to track and obtain feedback from what has been executed and proceed with the changes required; and closing, to formally complete the project.

Also, the PMP will deepen the ten knowledge areas based on the PMBOK Guide: integration, scope, schedule, cost, quality, resource, communication, risk, procurement, and stakeholders.

#### **1.4. General Objective**

To develop a project management plan for SPB in order to manage the opening of a new store based in Costa Rica

#### **1.5. Specific Objectives**

1. To develop the Project Charter in order to combine and coordinate the project activities
2. To create the project scope management to ensure all work required is included in the project
3. To define the Schedule Management Plan to manage the timely completion of the project
4. To create a Cost Management Plan to ensure the project is within the budget
5. To generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations
6. To create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project
7. To develop a communication plan to ensure transparency and efficiency during the project
8. To develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks



9. To generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project
10. To create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project

## Chapter II. THEORETICAL FRAMEWORK

### 2.1. Company/Enterprise Framework

#### 2.1.1. Company/Enterprise Background

SP is a small family business located in Costa Rica. They began operations in 2020 with their first store located in La Uruca. Although taking the first step has not been easy, SP is determined to always provide the best products and best treatment to customers, factors that will undoubtedly make them grow for many more years.

#### 2.1.2. Mission and Vision Statements

**Mission:** We are a family business with a big heart captured in our bakery and pastry products that seeks to satisfy the needs and tastes of all our customers. (M. Calvo, 2020)

**Vision:** To be the bakery of choice in the La Uruca area and surroundings, delighting our customers with the best quality products and treatment from our staff. (M. Calvo, 2020).

#### 2.1.3. Organizational Structure

Currently, the SP organizational structure has six (6) members; this is a common structure in small companies. In Costa Rica, small businesses are listed within the PYMES program (Small and Medium-Sized Enterprises/ Pequeñas y Medianas Empresas) of the Ministry of Economy, Industry, and Commerce (MEIC), for which an enrollment process must be completed (Appendix 4 contains the requested form registration).

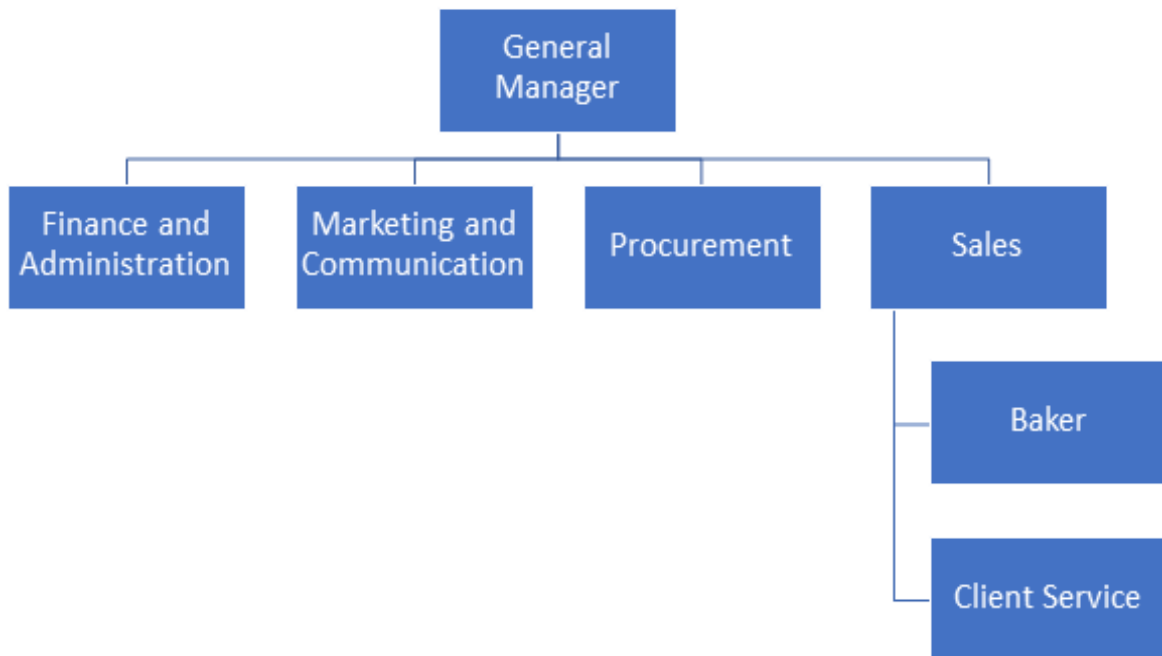


Figure 1. Organizational Structure. Source: Own elaboration.

#### 2.1.4. Products Offered

SP offers a wide variety of bakery and pastry products, among which are brownies, “Budín”, pizza bread, sweet rolls, baguettes, bread braids, and in general, bread in different presentations. In addition, SP seeks to diversify its income and provide a more complete service to its customers, which is why it integrated the sale of ground coffee, sodas, eggs, and a variety of dairy products, such as milk and cheese. (M. Calvo. Personal Communication. March 14, 2020).

## 2.2. Project Management Concepts

### 2.2.1. Project

PMBOK defines a project as: “A project is a temporary endeavor undertaken to create a unique product, service or resource.” (PMI, 2017, p.4)

A project does not have to mean a high budget, a large number of people, or in general, a complex project. From a young age, we have been part of projects; for example, a handmade gift for someone, where materials are involved, has a delivery time limit and can include a certain budget and certain people. Is important to

highlight that even if a project looks like another, each project involves something different, from the location, budget, date, equipment, human capital, among others.

A project drives changes, and that is the idea of implementing a PMP for SPB, to successfully transform the business from what it is now to their best version and create more business value.

### **2.2.2. Project Management**

PMBOK defines project management as: “The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.” (PMI, 2017, p.10).

The Association of Project Managers defined twelve (12) core components of project management:

1. Defining the reason why a project is necessary
2. Capturing project requirements, specifying the quality of the deliverables, and estimating resources and timescales
3. Preparing a business case to justify the investment
4. Securing corporate agreement and funding
5. Developing and implementing a management plan for the project
6. Leading and motivating the project delivery team
7. Managing the risks, issues, and changes on the project
8. Monitoring the progress against the plan
9. Managing the project budget
10. Maintaining communication with stakeholders and the project organization
11. Provider management
12. Closing the project in a controlled fashion when appropriate

### **2.2.3. Project Life Cycle**

PMBOK defines project life cycle as: “The series of phases that a project passes through from its start to its completion. It provides the basic framework for managing the project.” (PMI, 2017, p.19).

The project life cycle includes four (4) phases:

1. Initiation or starting
2. Planning or organizing and preparing
3. Execution or carrying out the work
4. Termination or closing the Project



Figure 2. Project Life Cycle. Source: Own elaboration.

The following figure shows how the knowledge areas are integrated in the process groups and how those are part of the project life cycle.

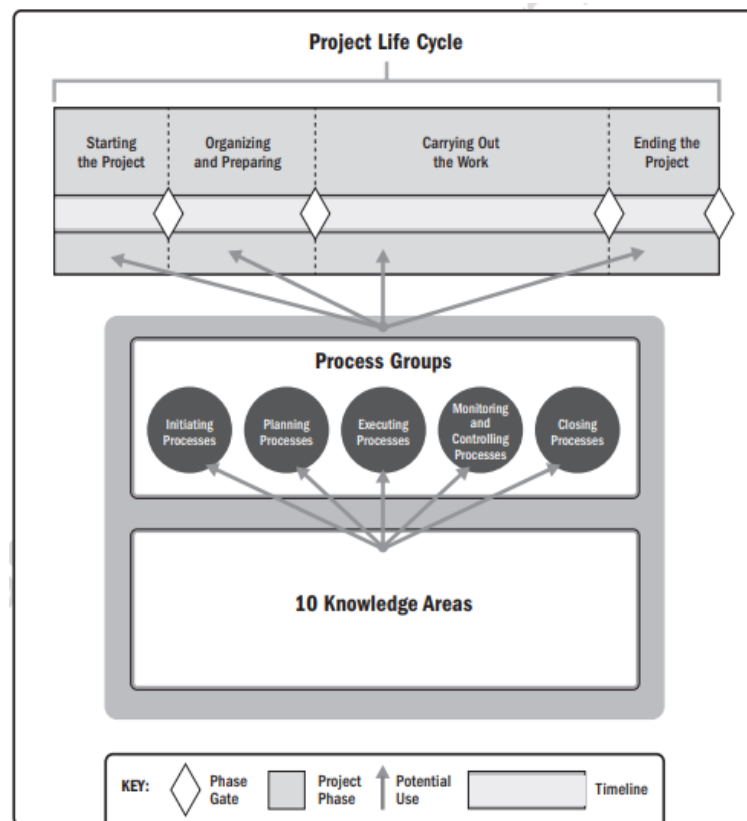


Figure 3. Interrelationship of The PMBOK Guide Key Components in Projects  
Source: PMI (2017).

### 2.2.4. Project Management Process Groups

The following are the five (5) processes to achieve the project goals:

1. **Initiating:** process to define and obtain the authorization of the project. At this phase, a PC should be developed, and the stakeholders should be identified.
2. **Planning:** process to define the strategy and how to make it happen. It includes the development of a project management plan, plan scope management, plan schedule management, plan cost management, plan resource management, plan quality management, plan communication management, plan risk management, plan procurement management, and plan stakeholder management.
3. **Executing:** implementation process of what was defined at the planning phase. At this phase, the communication, stakeholders, project work, quality, and resources should be managed; risk responses should be implemented, and procurements should be conducted.
4. **Monitoring and controlling:** this phase is present in each of the other four (4) phases. It involves supervising, preventing, and responding to any error made. It controls and monitors each of the ten (10) knowledge areas.
5. **Closing:** process to officially close the project. At this phase, it is important to obtain feedback from the stakeholders in order to learn for the next projects.

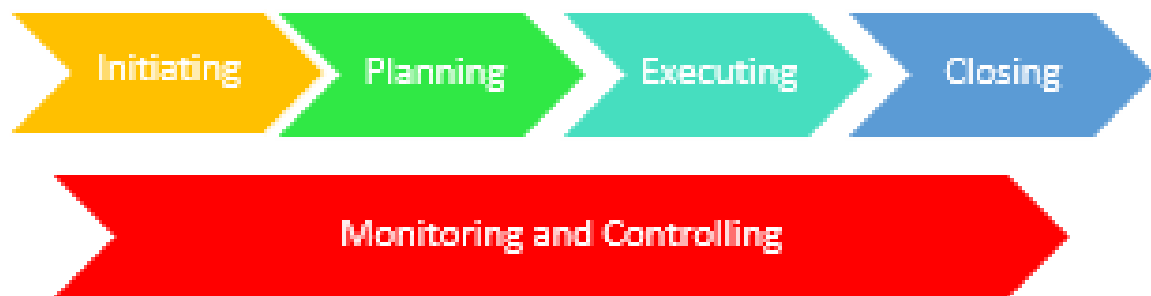


Figure 4. Project Management Processes Groups. Source: Own elaboration.

### 2.2.5. Project Management Knowledge Areas

This is the category that defines each required knowledge area, documents, tools, among others to achieve the project's objectives.

1. **Integration management:** It is the process to identify and coordinate the activities of the project management process groups.
2. **Scope management:** It defines the work that needs to be done to achieve the goals.
3. **Schedule management:** It is the process to manage the project schedule correctly.
4. **Cost management:** It is the process to manage the project budget so the project can be completed within the approved budget.
5. **Quality management:** It is the process to make the quality requirements meet stakeholders' expectations.
6. **Procurement management:** It is the process to acquire products or services required to complete the project.
7. **Resource management:** It is the process to identify and obtain the resources required for the project.
8. **Communication management:** It is the process to provide and receive the appropriate information in every phase of the project.
9. **Risk management:** It is the process of prevention, identification, and management of the risks.
10. **Stakeholder management:** It is the process of identification and management of all the people, groups, etc. that are impacted or will be through the project.

### 2.2.6. Business

Adam Hayes from Investopedia defines business as: "A business is defined as an organization or enterprising entity engaged in commercial, industrial, or professional activities. Businesses can be for-profit entities or non-profit organizations that operate to fulfill a charitable mission or further a social cause.

The term business also refers to the organized efforts and activities of individuals to produce and sell goods and services for profit. Businesses range in scale from a sole proprietorship to an international corporation. Several lines of theory are engaged with understanding business administration including organizational behavior, organization theory, and strategic management.” (Hayes, 2019)

SP is an entrepreneurship in Costa Rica, dedicated to the commerce of bakery products. It is a for-profit entity that started with an idea of giving the opportunity for many families to share great moments around pastry and bakery products and keep improving and innovating the products and value for their clients through time.

### **2.2.7. Entrepreneur**

Without a doubt, Marta Calvo and her family are entrepreneurs. They are willing to take risks for SP. Shobhit Seth from Investopedia defines it as: “An entrepreneur is an individual who starts and runs a business with limited resources and planning and is responsible for all the risks and rewards of his or her business venture. The business idea usually encompasses a new product or service rather than an existing business model.” (Seth, 2019)

### **2.2.8. Entrepreneurship**

Nowadays, the word “entrepreneurship” is well known and in everyone’s mind. The Entrepreneur Handbook defines entrepreneurship as: “Entrepreneurship refers to the concept of developing and managing a business venture in order to gain profit by taking several risks in the corporate world. Simply put, entrepreneurship is the willingness to start a new business. Entrepreneurship has played a vital role in the economic development of the expanding global marketplace.” (Entrepreneur Handbook, 2019).



## CHAPTER III. METHODOLOGICAL FRAMEWORK

The following chapter includes how the project is developed, including the information sources, research methods, tools, assumptions and constraints, and deliverables for each specific objective.

### 3.1. Information Sources

The SPB does not have a website or social networks, so the main source of information will be interviews with the owners of the company as well as the collection of opinions, concepts, and knowledge from the target market. To collect it, a survey mechanism will be used, which includes open, semi-open, and closed questions.

To complement the research, information sources such as PMBOK, the Internet, among others will be used. An information source is defined by Wikipedia as: "An information source is a person, thing, or place from which information comes, arises, or is obtained. Information sources can be known as primary or secondary. That source might then inform a person about something or provide knowledge about it. Information sources are divided into separate distinct categories, primary, secondary, tertiary, and so on."

#### 3.1.1. Primary Sources.

According to the UNSW library information, "Primary sources provide a first-hand account of an event or time period and are considered to be authoritative. They represent original thinking, reports on discoveries or events, or they can share new information. Often these sources are created at the time the events occurred, but they can also include sources that are created later. They are usually the first formal appearance of original research." (University of Newcastle Library, 2019)

The questionnaire will be used as a measurement instrument through the interview method, implemented in customers of the bakery and owners of the SP company. The interviews are about topics such as communication, costs, sales, motivation of their employees, processes, management of suppliers, among other topics. Refer to Chart 1 for the specific primary information sources that will be used.

### 3.1.2. Secondary Sources

According to the UNSW library information, “Secondary sources offer an analysis, interpretation or a restatement of primary sources and are persuasive. They often involve generalization, synthesis, interpretation, commentary or evaluation to convince the reader of the creator's argument. They often attempt to describe or explain primary sources.” (University of Newcastle Library, 2019).

The main secondary sources to be used in this study are the following:

- Published studies that are related to the object of study
- Inquiries on the Internet

Refer to Chart 1 for the specific secondary information sources that will be used.

*Chart 1. Information Sources. Source: Own elaboration.*

Objectives	Information sources	
	Primary	Secondary
1. To develop the Project Charter in order to combine and coordinate the project activities	Interview to the sponsor	The PMBOK Guide and Internet research
2. To create the project scope management to ensure all work required is included in the project	Interview to the sponsor	The PMBOK Guide and Internet research
3. To define the Schedule Management Plan to manage the timely completion of the project	Interview to the sponsor and legal documentation experts	The PMBOK Guide and Internet research
4. To create a Cost Management Plan and to ensure the project is within the budget	Interview to the sponsor	The PMBOK Guide and Internet research
5. To generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations	Interview and questionnaire	The PMBOK Guide and Internet research
6. To create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project	Interview to the sponsor	The PMBOK Guide and Internet research
7. To develop a communication plan to ensure transparency and efficiency during the project	Questionnaire	The PMBOK Guide and Internet research
8. To develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks	Interview to the sponsor and other bakery entrepreneurs	The PMBOK Guide and Internet research
9. To generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project	Interview to the sponsor and vendors	The PMBOK Guide and Internet research

Objectives	Information sources	
	Primary	Secondary
10. To create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project	Interview and questionnaire	The PMBOK Guide and Internet research

### 3.2. Research Methods

The University of Newcastle Library defines research methods as: “Research methods are the strategies, processes or techniques utilized in the collection of data or evidence for analysis in order to uncover new information or create better understanding of a topic.” (University of Newcastle Library, 2019).

In this project, the research methods that will be used are the analytical method, qualitative method, and quantitative method. Refer to Chart 2 for the specific research methods that will be used.

#### Analytical Method

The analytical method is defined by Management Mania as: “An analytical technique (analytical method) is a procedure or a method for the analysis of some problem, status or a fact. Analytical techniques are usually time-limited and task-limited. They are used once to solve a specific issue. Opposed to management methods that affect management of the organization in a longer term.” (Management Mania, 2017).

#### 3.2.2. Qualitative Method

The University of Newcastle Library refers to the qualitative method as: “Qualitative Research gathers data about lived experiences, emotions or behaviors, and the meanings individuals attach to them. It assists in enabling researchers to gain a better understanding of complex concepts, social interactions or cultural phenomena. This type of research is useful in the exploration of how or why things have occurred, interpreting events and describing actions.” (University of Newcastle Library, 2019).

### 3.2.3. Quantitative Method

The University of Newcastle Library refers to the qualitative method as: “Quantitative Research gathers numerical data which can be ranked, measured or categorized through statistical analysis. It assists with uncovering patterns or relationships, and for making generalizations. This type of research is useful for finding out how many, how much, how often, or to what extent.” (University of Newcastle Library, 2019).

*Chart 2. Research Methods. Source: Own elaboration.*

Objectives	Research methods		
	Analytical method	Qualitative method	Quantitative method
1. To develop the Project Charter in order to combine and coordinate the project activities	The method is going to be applied by brainstorming and the six questions technique to develop the Project Charter.	The method is going to be applied with interviews and oral stories to develop the Project Charter.	The method is going to be applied with questionnaires to develop the Project Charter.
2. To create the project scope management to ensure all work required is included in the project	The method is going to be applied by brainstorming and six questions techniques to develop the Project Charter.	The method is going to be applied with interviews and oral stories to define the project scope.	The method is going to be applied with questionnaires to define the project scope.
3. To define the Schedule Management Plan to manage the timely completion of the project	The method is going to be applied by brainstorming to define the project schedule.	The method is going to be applied with interviews, observation, and oral stories to define the project schedule.	The method is going to be applied with questionnaires and observation to define the project schedule.
4. To create a Cost Management Plan to ensure the project is within the budget	The method is going to be applied with six questions techniques to create a Cost Management Plan.	The method is going to be applied with interviews to create a Cost Management Plan.	The method is going to be applied with questionnaires to create a Cost Management Plan.

Objectives	Research methods		
	Analytical method	Qualitative method	Quantitative method
5. To generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations	The method is going to be applied by brainstorming and the six questions technique to create a Quality Management Plan.	The method is going to be applied with interviews, observation, and oral stories to create a Quality Management Plan.	The method is going to be applied with questionnaires and observation to create a Quality Management Plan.
6. To create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project	The method is going to be applied with observation and six questions techniques to identify the resources required.	The method is going to be applied with interviews to identify the resources required.	The method is going to be applied with questionnaires to identify the resources required.
7. To develop a communication plan to ensure transparency and efficiency during the project	The method is going to be applied by brainstorming and six questions techniques to develop a communication plan.	The method is going to be applied with interviews, observation, and oral stories to develop a communication plan.	The method is going to be applied with questionnaires and observation to develop a communication plan.
8. To develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks	The method is going to be applied with SWOT analysis, brainstorming, and six questions techniques.	The method is going to be applied with interviews, observation, and oral stories.	The method is going to be applied with questionnaires and observation.
9. To generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project	The method is going to be applied with SWOT analysis, brainstorming, and six questions techniques to generate a Procurement Management Plan.	The method is going to be applied with interviews, observation, and oral stories to generate a Procurement Management Plan.	The method is going to be applied with questionnaires and observation to generate a Procurement Management Plan.

Objectives	Research methods		
	Analytical method	Qualitative method	Quantitative method
10. To create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project	The method is going to be applied by brainstorming to identify stakeholders.	The method is going to be applied with interviews and oral stories to identify stakeholders.	The method is going to be applied with questionnaires to identify stakeholders.

### 3.3. Tools

A tool is considered as a device used to carry out a function. The Cambridge Dictionary defines it as “something that helps you to do a particular activity.” (Cambridge Dictionary, n.d)

The tools used on the FGP are the following. Refer to Chart 3 for the tools that will be used.

- Expert judgement: It “is defined as judgement provided based upon expertise in an application area, Knowledge Area, discipline, industry, etc., as appropriate for the activity being performed” (PMI, 2017, p.79).
- Brainstorming: “this technique is used to identify a list of ideas in a short period of time. It is conducted in a group environment and is led by a facilitator” (PMI, 2017, p.80).
- Interviews: They “are used to obtain information on high-level requirements, assumptions or constraints, approval criteria, and other information from stakeholders by talking directly to them” (PMI, 2017, p.80).
- Meetings: They “are used to discuss and address pertinent topics of the project when directing and managing project work. Attendees may include the project manager, the project team, and appropriate stakeholders involved or affected by the topics addressed” (PMI, 2017, p.95).

- Questionnaires: They are “written sets of questions designed to quickly accumulate information from a large number of respondents” (PMI, 2017, p.718).
- Decomposition: It “is a technique used for dividing and subdividing the project scope and project deliverables into smaller, more manageable parts” (PMI, 2017, p.158).
- Hierarchical charts: The “traditional organizational chart structure can be used to show positions and relationships in a graphical, top-down format” (PMI, 2017, p.316).
- Responsibility assignment matrix: It “shows the project resources assigned to each work package. It is used to illustrate the connections between work packages, or activities, and project team members” (PMI, 2017, p.317).
- Flowcharts: A flowchart is a “description in a diagram format of the inputs, process actions, and outputs of one or more processes within a system” (PMI, 2017, p.707).
- Sample interactive communication model: “this model also describes communication as a process consisting of two parties, the sender and receiver, but recognizes the need to ensure that the message has been understood” (PMI, 2017, p.372).
- Project reporting: It is the “act of collecting and distributing project information. Project information is distributed to many groups of stakeholders and should be adapted to provide information at an appropriate level, format, and detail for each type of stakeholder” (PMI, 2017, p.385).
- SWOT analysis: “this technique examines the project from each of the strengths, weaknesses, opportunities, and threats (SWOT) perspective” (PMI, 2017, p.415).
- Power/Interest grid, power/influence grid: “each of these techniques supports a grouping of stakeholders according to their level of

authority(power), level of concern about the projects outcomes (interest), ability to influence the outcomes of the project (influence), or ability to cause changes to the projects planning or execution” (PMI, 2017, p.512).

Chart 3. Tools. Source: Own elaboration.

Objectives	Tools
1. To develop the Project Charter in order to combine and coordinate the project activities	<ul style="list-style-type: none"> <li>• Brainstorming</li> <li>• Interviews</li> <li>• Meetings</li> </ul>
2. To create the project scope management to ensure all work required is included in the project	<ul style="list-style-type: none"> <li>• Brainstorming</li> <li>• Interviews</li> <li>• Meetings</li> <li>• Questionnaires</li> </ul>
3. To define the Schedule Management Plan to manage the timely completion of the project	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Decomposition</li> <li>• Meetings</li> </ul>
4. To create a Cost Management Plan to ensure the project is within the budget	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Meetings</li> </ul>
5. To generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations	<ul style="list-style-type: none"> <li>• Hierarchical charts</li> <li>• Responsibility assignment matrix</li> <li>• Meetings</li> </ul>
6. To create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Brainstorming</li> <li>• Interviews</li> <li>• Flowcharts</li> </ul>
7. To develop a communication plan to ensure transparency and efficiency during the project	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Sample interactive communication model</li> <li>• Project reporting</li> <li>• Meetings</li> </ul>
8. To develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Brainstorming</li> <li>• Interviews</li> <li>• SWOT analysis</li> <li>• Meetings</li> </ul>
9. To generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project	<ul style="list-style-type: none"> <li>• Expert judgement</li> </ul>



Objectives	Tools
10. To create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project	<ul style="list-style-type: none"> <li>• Expert judgement</li> <li>• Questionnaire</li> <li>• Brainstorming</li> <li>• Power/Interest grid and power/influence grid</li> <li>• Meetings</li> </ul>

### 3.4. Assumptions and Constraints

Fahad Usmani defines assumption at the PM Study Circle as:

“An assumption is what you believe to be true. These are anticipated events or circumstances that are expected during your project’s life cycle. You make assumptions based on your experience or the information available on hand. Assumptions may not end up being true. Sometimes, they can be false, and it may affect your project. This adds risk to the project.” (Usmani, 2019).

Also, he defines constraints as: “Constraints are limitations imposed on the project: for example, budget, schedule, or resources, etc.

The PMBOK Guide recognizes six project constraints: scope, quality, schedule, budget, resources, and risk. Out of these six, scope, schedule, and budget are known as the triple constraints.

These constraints are defined at the beginning of your project. And you have to work within their boundaries.” (Usmani, 2019).

Refer to Chart 4 for the specific assumptions and constraints that will be used.

*Chart 4. Assumptions and Constraints. Source: Own elaboration.*

Objectives	Assumptions	Constraints
1. To develop the Project Charter in order to combine and coordinate the project activities	A fully integrated plan will be developed.	Short period of time to complete all phases
2. To create the project scope management to ensure all work required is included in the project	Clients will disclose all information required to the scope development.	Changes on the scope if the customer requires it
3. To define the Schedule Management Plan to manage the timely completion of the project	A realistic activity duration will be provided.	External or internal factors may change the duration of the activities.
4. To create a Cost Management Plan to ensure the project is within the budget	A percentage will be allocated for expenses.	There might be financial statements that are restrained to the project,

Objectives	Assumptions	Constraints
	Personnel costs will not change.	for example the cash flow statement.
5. To generate a Quality Management Plan to incorporate the quality policy to ensure stakeholders' expectations	All quality requirements will be gathered and analyzed.	Lack of consistency in following up the quality measurement tools
6. To create a Resource Management Plan to identify, acquire, and manage all resources needed in order to successfully complete the project	The Project Manager will get all the resources you need. Team members have all the required skills.	New skills required faster than when the training could be developed.
7. To develop a communication plan to ensure transparency and efficiency during the project	Knowledge on the usage of technology An employee will support the team in the marketing area.	Technical issues, such as with cellphones and internet access Lack of consistency in communication
8. To develop a Risk Management Plan that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks	Sufficient information to identify potential risks	There is no visibility of a possible risk.
9. To generate a Procurement Management Plan to handle the purchase of materials or acquisition of services or results needed for the project	The personnel will identify the goods and services required.	Suppliers should not have any delay and should have the amount of materials required.
10. To create a Stakeholder Management Plan that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project	Stakeholders can be identified and will be available during the project weeks to provide information if required.	Private information of third parties might be restrained to the project, as email, name or phone.

### 3.5. Deliverables

PMBOK refers to deliverables as “any unique and verifiable product, result or capability to perform a service that is required to be produced to complete a process, phase or project. Deliverables may be tangible or intangible.” (PMI, 2017, p. 4.).

Refer to Chart 5 for the specific deliverables that will be used.

*Chart 5. Deliverables. Source: Own elaboration.*

Objectives	Deliverables
1. To develop the PC in order to combine and coordinate the project activities	<ul style="list-style-type: none"> <li>• PC</li> </ul>
2. To create the project scope management to ensure all work required is included in the project	<ul style="list-style-type: none"> <li>• SCMP</li> <li>• WBS</li> </ul>

3. To define the SCHMP to manage the timely completion of the project	<ul style="list-style-type: none"> <li>• SCHMP</li> <li>• Control schedule document</li> </ul>
4. To create a COMP to ensure the project is within the budget	<ul style="list-style-type: none"> <li>• COMP</li> <li>• Control budget document</li> </ul>
5. To generate a QMP to incorporate the quality policy to ensure stakeholders' expectations	<ul style="list-style-type: none"> <li>• QMP</li> <li>• Control quality document</li> </ul>
6. To create a REMP to identify, acquire, and manage all resources needed in order to successfully complete the project	<ul style="list-style-type: none"> <li>• REMP</li> <li>• Control quality document</li> </ul>
7. To develop a communication plan to ensure transparency and efficiency during the project	<ul style="list-style-type: none"> <li>• CMP</li> <li>• Project reports</li> <li>• Communication templates</li> </ul>
8. To develop a RMP that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks	<ul style="list-style-type: none"> <li>• RMP</li> <li>• Risk response plan</li> <li>• Control risk document</li> </ul>
9. To generate a PCMP to handle the purchase of materials or acquisition of services or results needed for the project	<ul style="list-style-type: none"> <li>• PCMP</li> <li>• Control procurement document</li> </ul>
10. To create a SMP that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project	<ul style="list-style-type: none"> <li>• SMP</li> <li>• Monitor stakeholder engagement document</li> </ul>

## CHAPTER IV. RESULTS

The result section refers to the expansion of the specific objectives by the implementation of the tools and methodologies specified in the previous chapter in order to obtain the deliverables, which are the project results.

### **4.1. To develop the PC in order to combine and coordinate the project activities**

According to The PMBOK Guide, the project integration management refers to “the processes and activities to identify, define, combine, unify and coordinate the various processes and project management activities within the Project Management Process Groups. In the project management context, integration includes characteristics of unification, consolidation, communication and interrelationships.” (PMI, 2017, p.69).

The development of a PC is the first of five project integration management processes:

1. Developing the PC
2. Developing the project management plan
3. Directing and managing the project work
4. Managing the project knowledge
5. Monitoring and controlling the project work

The PC is a document that consolidates the last-mentioned characteristics (unification, consolidation, communication, and interrelationships); also, this document provides the authorization of the project and gives the rights to the PM to apply organizational resources to each activity (PMI, 2017, p.70).

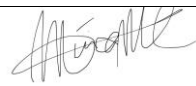
Since SP is a brand-new entrepreneurship, there was no information on the Internet. Tools such as brainstorming, interviews, and meetings with the owners were required to develop the PC. As a result from the tools mentioned before, the defined project purpose is to develop a project management plan for a new bakery in Costa Rica called SP; an organized document that includes key aspects of the project is highly important. Those key aspects include the process groups: initiation, to define the new project and obtain the permissions required; planning, to define the scope,

objectives, and sequence of activities to achieve the objectives; execution of the activities defined; monitoring and controlling, in order to track and obtain feedback from what has been executed and proceed with the changes required; and closing, to formally complete the project.

<b>PC</b> <b>It formalizes the project start and confers the project manager with the authority to assign company resources to the project activities. Benefits: it provides a clear start and well defined project boundaries.</b>	
<b>Date</b>	<b>Project name:</b>
May 25, 2020	Project Management Plan for SPB
<b>Knowledge areas / processes</b>	<b>Application area (sector / activity)</b>
<b>Knowledge areas:</b> <ul style="list-style-type: none"> <li>● Project integration management</li> <li>● Project scope management</li> <li>● Project schedule management</li> <li>● Project cost management</li> <li>● Project quality management</li> <li>● Project resource management</li> <li>● Project communication management</li> <li>● Project risk management</li> <li>● Project procurement management</li> <li>● Project stakeholder management</li> </ul> <b>Process groups:</b> <ul style="list-style-type: none"> <li>● Initiation</li> <li>● Planning</li> <li>● Execution</li> <li>● Monitoring and controlling</li> <li>● Closing</li> </ul>	Construction and facilities
<b>Start date</b>	<b>Finish date</b>
May 25, 2020	July 24, 2020
<b>Project objectives (general and specific)</b>	
<b>General objective:</b> To develop a project management plan for SPB in order to manage the opening of a new store based in Costa Rica	

<p><b>Specific objectives:</b></p> <ol style="list-style-type: none"> <li>1. To develop the PC and identify stakeholders in order to combine and coordinate the project activities</li> <li>2. To create the project scope management to ensure all work required is included in the project</li> <li>3. To define the activities, their sequence, and duration to manage the timely completion of the project</li> <li>4. To create a COMP to ensure the project is within the budget</li> <li>5. To generate the plan quality management to incorporate the quality policy to ensure stakeholders' expectations</li> <li>6. To identify required products and services and acquire and purchase them</li> <li>7. To develop a communication plan to ensure transparency and efficiency during the process</li> <li>8. To identify potential risks and recommend control measures</li> <li>9. To generate a PCMP to handle the purchase of materials or acquisition of services</li> <li>10. To identify both internal and external stakeholders present in the project</li> </ol>
<p><b>Project purpose or justification (merit and expected results)</b></p> <p>To develop a project management plan for a new bakery in Costa Rica called SP; an organized document that includes key aspects of the project is highly important. Those key aspects include the process groups: initiation, to define the new project and obtain the permissions required; planning, to define the scope, objectives, and sequence of activities to achieve the objectives; execution of the activities defined; monitoring and controlling, in order to track and obtain feedback from what has been executed and proceed with the changes required; and closing, to formally complete the project.</p>
<p><b>Description of product or service to be generated by the project – project final deliverables</b></p> <p>The project deliverable will be the project management plan for SPB in Costa Rica.</p>
<p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>● The project will be completed on time.</li> <li>● It will be developed by one resource, the project manager.</li> </ul>
<p><b>Constraints</b></p> <ul style="list-style-type: none"> <li>● Resources: One head count (project manager)</li> <li>● Schedule changes</li> </ul>
<p><b>Preliminary risks</b></p> <ul style="list-style-type: none"> <li>● The budget might increase.</li> <li>● Schedule changes</li> </ul>
<p><b>Budget</b></p> <p>\$15,810</p>

Milestones and dates		
TAREA	INICIO	FIN
<b>Legal Documentation</b>	4-6-20	20-7-20
Municipalidad de San José Patent requirement	4-6-20	4-6-20
Land use authorization requirement	4-6-20	4-6-20
Ministerio de Salud authorization requirement	4-6-20	4-6-20
CCSS registration as employer requirement	4-6-20	4-6-20
Work risk insurance requirement	4-6-20	4-6-20
Tributación Directa registration requirement	4-6-20	4-6-20
Municipalidad de San José Patent approval	4-6-20	20-7-20
Land use authorization approval	4-6-20	4-6-20
Ministerio de Salud authorization approval	4-6-20	20-7-20
CCSS registration as employer approval	4-6-20	6-7-20
Work risk insurance approval	4-6-20	4-6-20
Tributación Directa registration approval	4-6-20	18-6-20
<b>Store Space</b>	18-5-20	3-6-20
Location and Measurements	18-5-20	27-5-20
Electricity	27-5-20	3-6-20
Water	27-5-20	3-6-20
<b>Bakery Equipment</b>	27-5-20	22-7-20
Refrigeration chambers -suppliers comparison	27-5-20	1-6-20
Ovens-suppliers comparison	27-5-20	1-6-20
Dough Roller-suppliers comparison	27-5-20	1-6-20
Mixer-suppliers comparison	27-5-20	1-6-20
Cookware-suppliers comparison	27-5-20	30-5-20
Refrigeration chambers -purchase	20-7-20	22-7-20
Ovens-purchase	20-7-20	22-7-20
Dough Roller-purchase	20-7-20	22-7-20
Mixer-purchase	20-7-20	22-7-20
Cookware-purchase	20-7-20	22-7-20
<b>Suppliers</b>	27-5-20	21-7-20
Pastry and bakery products – suppliers comparison	27-5-20	1-6-20
Beverage– suppliers comparison	3-6-20	8-6-20
Coffee Packages– suppliers comparison	3-6-20	8-6-20
Packaged snacks– suppliers comparison	3-6-20	8-6-20
Pastry and bakery products – purchase	20-7-20	21-7-20
Beverage– purchase	20-7-20	21-7-20
Coffee Packages– purchase	20-7-20	21-7-20
Packaged snacks– purchase	20-7-20	21-7-20
<b>Human Resource</b>	4-6-20	24-7-20
Client Services Interviews	4-6-20	8-6-20
Baker Interviews	4-6-20	8-6-20
Marketing Interviews	4-6-20	8-6-20
Procurement Interviews	4-6-20	8-6-20
Finance Interviews	4-6-20	8-6-20
Client Services Hiring	22-7-20	24-7-20
Baker Hiring	22-7-20	24-7-20
Marketing Hiring	22-7-20	24-7-20
Procurement Hiring	22-7-20	24-7-20
Finance Hiring	22-7-20	24-7-20

<b>Relevant historical information</b>	
Not applicable	
<b>Stakeholders</b>	
<b>Direct stakeholders:</b> <ul style="list-style-type: none"> <li>● SPO</li> <li>● Suppliers</li> <li>● SP staff</li> <li>● Municipalidad de San Jose</li> <li>● Clients</li> </ul> <b>Indirect stakeholders:</b> <ul style="list-style-type: none"> <li>● Competition – other bakery owners</li> </ul>	
<b>Project manager: Mónica Morales Calvo</b>	<b>Signature:</b> 
<b>Authorized by: Marta Calvo Solano</b>	<b>Signature:</b>

#### 4.2. To create the project SCMP to ensure all work required is included in the project

The project scope management refers to “the processes required to ensure that the project includes all the work required, and only the work required, to complete the project successfully. Managing the project scope is primarily concerned with defining and controlling what is and is not included in the project” (PMI, 2017, p.129). The PSM includes six phases:

6. Plan scope management
7. Collect requirements
8. Define scope
9. Create WBS
10. Validate scope
11. Control scope



### 4.2.1. Plan Scope Management

The PMBOK defines the PSM as “The process of creating a SCMP that documents how the project and product scope will be defined, validated and controlled” (PMI, 2017, p.129).

To develop the PSM, inputs are required, such as the PC (Appendix 1: FGP Charter) and enterprise environmental factors gathered from an interview with the owners.

*Chart 6. Enterprise Environmental Factors Interview. Source: Own elaboration.*

<b>Enterprise environmental factors</b>	<b>Comments</b>
Organization's culture	SP is a small family business. They are in the process of identifying their organization's culture, but something they are sure is that the baselines for this culture are values such as respect, honesty, and transparency coming from the administration to the employees and vice versa.
Infrastructure	SP has a 42m2 space located at La Uruca. This location was strategic due to the proximity of the INS hospital and the neighborhoods.
Personnel administration	Daily 30 minute meetings to recap the day and weekly 1-hour meetings with the team to recap the week and work on roadblock. Due to security concerns with past businesses, the owners are very vigilant about everyday materials and budget.
Marketplace conditions	Bakeries have a large market and can be found in every neighborhood in the country. They have a large target market, since for the “ticos”, bread consumption is almost daily, and it is also normal to take a coffee-break in the afternoon, for which they seek to have the coffee with a pastry or bread.

#### **4.2.1.1. Requirements collection**

In order to meet the project objectives, defining, documenting and managing the stakeholder's needs is required. The project requirements were defined in the following five areas, these requirements were collected by a brainstorming and previous experience from SPO.

Legal documentation:

- Patent from Municipalidad de San Jose
- Land use authorization
- Ministerio de Salud authorization
- CCSS registration as employer
- Work risk insurance
- Tributación Directa registration

Store space:

- Location and measurements
- Electricity
- Water

Bakery equipment:

- Refrigeration chambers
- Ovens
- Dough roller
- Mixer
- Cookware

Suppliers:

- Pastry and bakery products
- Beverage
- Coffee packages
- Packaged snacks

Human resource:

- Client services hiring
- Baker hiring

- Marketing hiring
- Procurement hiring
- Finance hiring

#### ***4.2.1.2. Roles and Responsibilities***

Every project must be developed by certain people, namely a work team that seeks to achieve a common goal. In addition to this team, there are people / companies that directly or indirectly impact the project. All these companies or people take important roles in the progress of the project, and in order to move forward, each one takes responsibility.

*Chart 7. Scope Management Roles and Responsibilities. Source: Own elaboration.*

<b>Name</b>	<b>Role</b>	<b>Responsibilities</b>
Marta Calvo	Project sponsor	<ul style="list-style-type: none"> <li>● To approve or deny changes in the project</li> <li>● To approve or deny changes in the project scope</li> </ul>
Monica Morales	Project manager	<ul style="list-style-type: none"> <li>● To define the project scope</li> <li>● To manage control measures</li> <li>● To document requirements</li> <li>● To oversee the execution of the project</li> </ul>
SP team members	Team members	<ul style="list-style-type: none"> <li>● To contribute to the project scope</li> <li>● To contribute with changes for the project scope</li> </ul>
Suppliers	Suppliers	<ul style="list-style-type: none"> <li>● To deliver the materials required on time</li> <li>● To suggest new products or offers</li> </ul>
La Uruca community	Community-Clients	<ul style="list-style-type: none"> <li>● To provide feedback</li> <li>● To share and identify the products needed</li> </ul>

#### **4.2.1.3. Scope Definition**

The definition of the project scope refers to “the process of developing a detailed description of the project and product. The key benefit of this process is that it describes the product, service, or result boundaries and acceptance criteria.” (PMI, 2017, p.150).

The outcome of the scope definition is the project scope statement, which is defined by The PMBOK Guide as “the description of the project scope, major deliverables, assumptions and constraints (...). It also provides a common

understanding of the project scope among project stakeholders” (PMI, 2017, p.154). The project scope statement includes the following elements:

- **Product scope description**

To develop a project management plan for a new bakery in Costa Rica called SP; an organized document that includes key aspects of the project is highly important. Those key aspects include the process groups: initiation, to define the new project and obtain the permissions required; planning, to define the scope, objectives, and sequence of activities to achieve the objectives; execution of the activities defined; monitoring and controlling, in order to track and obtain feedback from what has been executed and proceed with the changes required; and closing, to formally complete the project.

- **Deliverables**

The project deliverable will be the project management plan for SPB in Costa Rica. The project management plan includes one chapter for each knowledge area (project integration management, project scope management, project schedule management, project cost management, project quality management, project resource management, project communication management, project risk management, project procurement management, and project stakeholder management).

- **Acceptance criteria**

As acceptance criteria, it was defined that all requirements will be formally approved by the SPO.

- **Project assumptions**

The identified project assumptions are that the project will be completed on time and developed by one resource, the project manager.

#### ***4.2.1.4. Work Breakdown Structure***

The PMBOK defines the WBS as “The process of creating a SCMP that documents how the project and product scope will be defined, validated and controlled” (PMI, 2017, p.129). First, in order to create the WBS, it is important to

identify the activities needed to complete the project. The definition of activities is the process required to identify and document the activities required to obtain the project deliverable (PMI, 2017, p.183). An output of the activity definition is the activity list, which main purpose is to ensure team members understand what is needed to achieve the project completion.

*Chart 8. Scope Management Activity List. Source: Own elaboration.*

<b>SPB PMP, La Uruca, San Jose, Costa Rica (level 1)</b>		
<b>WBS ID</b>	<b>Activity (level 2)</b>	<b>Activity (level 3)</b>
1	Legal documentation	<ul style="list-style-type: none"> <li>● Patent from Municipalidad de San Jose</li> <li>● Land use authorization</li> <li>● Ministerio de Salud authorization</li> <li>● CCSS registration as employer</li> <li>● Work risk insurance</li> <li>● Tributación Directa registration</li> </ul>
2	Store space	<ul style="list-style-type: none"> <li>● Location and measurements</li> <li>● Electricity</li> <li>● Water</li> </ul>
3	Bakery equipment	<ul style="list-style-type: none"> <li>● Refrigeration chambers</li> <li>● Ovens</li> <li>● Dough roller</li> <li>● Mixer</li> <li>● Cookware</li> </ul>
4	Suppliers	<ul style="list-style-type: none"> <li>● Pastry and bakery products</li> <li>● Beverage</li> <li>● Coffee packages</li> <li>● Packaged snacks</li> </ul>
5	Human resource	<ul style="list-style-type: none"> <li>● Client services</li> <li>● Baker</li> <li>● Marketing</li> <li>● Procurement</li> <li>● Finance</li> </ul>

Subsequently, the WBS dictionary was developed, which according to The PMBOK Guide, is defined as “a document that provides detailed deliverables, activity, and scheduling information about each component in the WBS. The WBS is a document that supports the WBS. Most of the information included in the WBS dictionary is created by other processes and added to this document at a later stage” (PMI, 2017, p.162).

Chart 9. WBS Dictionary. Source: Own elaboration.

Level	WBS ID	Activity	Description	Cost estimates
<b>1</b>	<b>1.1</b>	<b>Legal documentation</b>		
2	1.1.1	Municipalidad de San Jose patent	Official registration of commerce with the respective city hall	\$200
2	1.1.2	Land use authorization	Procedure to obtain permission to use the space for commercial purposes	Free
2	1.1.3	Ministerio de Salud authorization	Health and safety regulations	\$60
2	1.1.4	CCSS registration as employer	Insurance in health events and retirement	No payment required for the registration
2	1.1.5	Work risk insurance	Insurance in case of an eventuality or loss	No payment required for the registration
2	1.1.6	Tributación Directa registration	Documents related to tax payment	No payment required for the registration
<b>1</b>	<b>2.1</b>	<b>Store space</b>		
2	2.1.1	Location and measurements	Define the location of the premises with the necessary measures	\$500
2	2.1.2	Electricity	Electricity expenses	\$200
2	2.1.3	Water	Water expenses	\$200
<b>1</b>	<b>3.1</b>	<b>Bakery equipment</b>		
2	3.1.1	Refrigeration chambers	Refrigeration equipment for products for sale as bakery products	\$2500
2	3.1.2	Ovens	Ovens to bake the products	\$2000
2	3.1.3	Dough roller	Industrial roller for bakery products	\$2000
2	3.1.4	Mixer	Mixer for bakery products	\$1000
2	3.1.5	Cookware	Bakery utensils needed to carry out recipes	\$500
<b>1</b>	<b>4.1</b>	<b>Suppliers</b>		
2	4.1.1	Pastry and bakery products	Flour, eggs, butter, sugar, salt, yeast, baking soda, oil, chocolate, etc.	\$1000
2	4.1.2	Beverage	Sodas, milk, natural juices, water, etc.	\$350
2	4.1.3	Coffee packages	Coffee packages	\$150
2	4.1.4	Packaged snacks	Cookies, cereals, chips, etc.	\$150
<b>1</b>	<b>5.1</b>	<b>Human resources</b>		
2	5.1.1	Client services	Person in charge of serving customers and the purchase process	No payment required
2	5.1.2	Baker	Person in charge of preparing all the products to be sold	No payment required
2	5.1.3	Marketing	Person in charge of giving visibility to the company, products, and promotions	No payment required
2	5.1.4	Procurement	Person in charge of the relationship with the suppliers and the processes related to the purchase of materials	No payment required

Level	WBS ID	Activity	Description	Cost estimates
2	5.1.5	Finance	Person in charge of the company's finances	No payment required

As it was mentioned before, the WBS is a system that breaks down the project in activities that need to be done to achieve the goal.

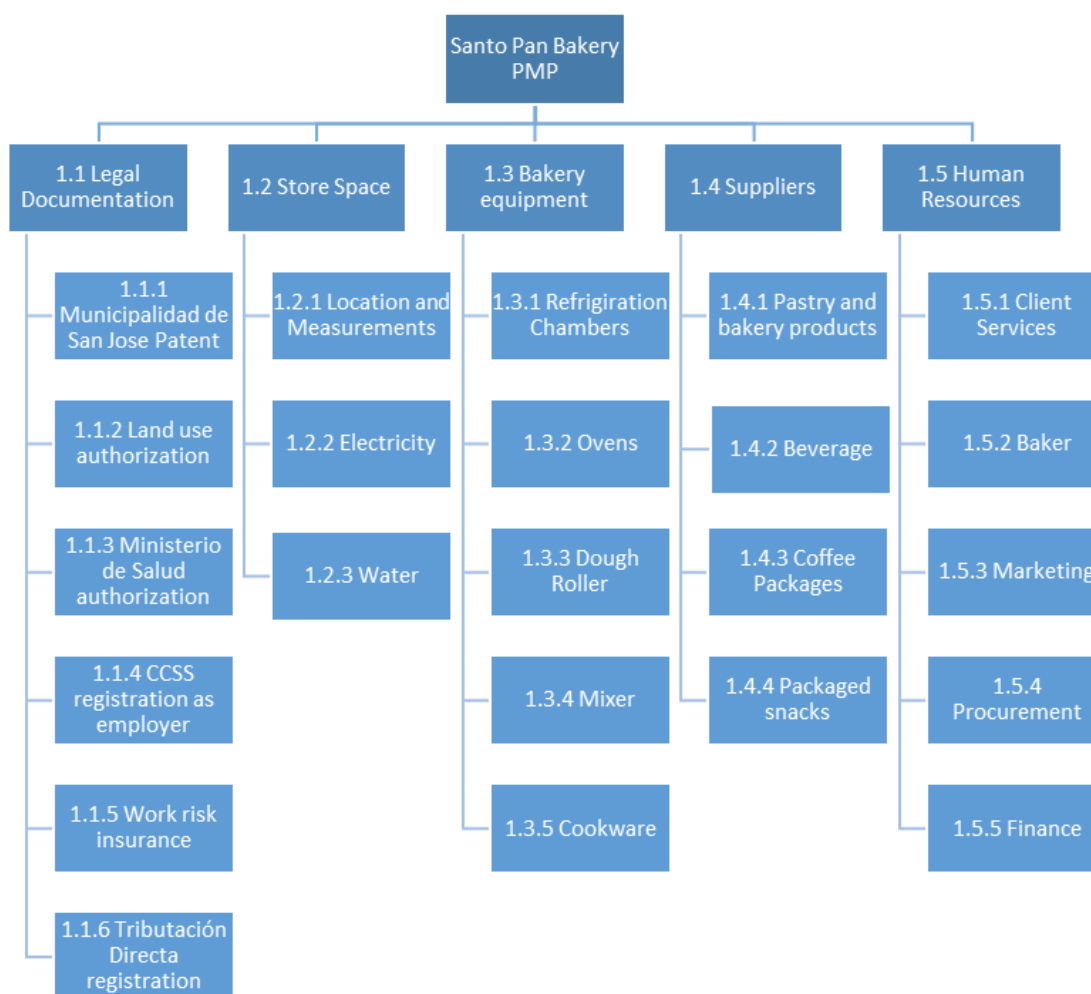


Figure 5. SP WBS. Source: Own elaboration.

#### 4.2.1.5. Scope Validation

“The scope validation is the process of formalizing acceptance of the completed project deliverables” (PMI, 2017, p.163). Once the client's information and requirements have been obtained, the project manager proceeds to develop the project scope statement and the WBS, with the WBS dictionary. Then, the project



manager sets a meeting with the project sponsor (SPO) in order to obtain the approval of the deliverables and the project.

#### **4.2.1.6. Scope Control Procedure**

To control that deliverables are being completed at the established times, scope control measures are set, which are defined as “the process of monitoring the status of the project and product scope and managing changes to the scope baseline” (PMI, 2017, p.167).

To carry out the control of the scope , it is proposed to use the following Kanban board, which is defined as: “The term “kanban” is Japanese (看板), with the sense of a sign, poster or billboard, and derived from roots which literally translate as “visual board”. (...) The phrase “Kanban method” also refers to an approach to continuous improvement which relies on visualizing the current system of work scheduling, managing “flow” as the primary measure of performance, and whole-system optimization – as a process improvement approach, it does not prescribe any particular practices.” (Agile Alliance, n.d). The main idea of the Kanban board is to have visibility of the progress of each activity and alert if any of them has remained in the “to do” or “doing” area for a long time in order to understand the reasons and eliminate roadblocks. Usually, post-it notes are used, but being digital, colors can be set; in this case, red will be for to do, yellow for doing, and green for done.

Chart 10. Kanban Board. Source: Own elaboration.

Activity	To do	Doing	Done
Municipalidad de San José patent requirement			
Land use authorization requirement			
Ministerio de Salud authorization requirement			
CCSS registration as employer requirement			
Work risk insurance requirement			
Tributación Directa registration requirement			
Municipalidad de San José patent approval			
Land use authorization approval			
Ministerio de Salud authorization approval			
CCSS registration as employer approval			
Work risk insurance approval			
Tributación Directa registration approval			
Location and measurements			
Electricity			
Water			
Refrigeration chambers -supplier comparison			
Ovens-supplier comparison			
Dough roller-supplier comparison			
Mixer-supplier comparison			
Cookware-supplier comparison			
Refrigeration chambers -purchase			
Ovens-purchase			
Dough roller-purchase			
Mixer-purchase			
Cookware-purchase			
Pastry and bakery products – supplier comparison			
Beverages– supplier comparison			
Coffee packages– supplier comparison			
Packaged snacks– supplier comparison			
Pastry and bakery products – purchase			
Beverages– purchase			
Coffee packages– purchase			
Packaged snacks– purchase			
Client service interviews			
Baker interviews			
Marketing interviews			
Procurement interviews			
Finance interviews			
Client service hiring			
Baker hiring			
Marketing hiring			
Procurement hiring			
Finance hiring			
Control Checklist			
Control Audit			

### **4.3. To define the SCHMP to manage the timely completion of the Project**

The PMBOK Guide defines the project schedule management as “The process of establishing the policies, procedures, and documentation for planning, developing, managing, executing, and controlling the project schedule. The key benefit of this process is that provides guidance and direction on how the project schedule will be managed throughout the project” (PMI, 2017, p.179).

First, to set the schedule of the project, the activities must be defined; refer to *Chart 8. Scope Management Activity List*. Once the activities are defined, the PM, the project team, and the sponsors will set a meeting to define the project timeline and the roadmap of the project execution.

#### **4.3.1. Process Description**

Previously, the activities required to complete the project were identified; however, the project flow should start with the store space that meets the required measures (to identify the measures, a pre-work is necessary to know the approximate measures of the bakery equipment) and the strategic location requested by the customers. Once identified, all legal documents should be requested; parallel to these activities, the search and purchase of bakery equipment and interviews with the required personnel can be started. After purchasing the bakery equipment, the electricity and water requirements for each equipment can be identified, as well as the location within the bakery shop. In parallel, an investigation process and comparison between suppliers begins in order to have different options and analyze which is the most convenient for the company.

Once the legal procedures have been approved, the personnel can be hired and the products for sale and bakery materials can be purchased. The process mentioned before can be summarized in the following activity sequence figure, which according to The PMBOK Guide, “defines the logical sequence of work to obtain the greatest efficiency given all project constraints” (PMI, 2017, p.187).

Chart 11. Project Activities ID. Source: Own elaboration.

<b>Activity</b>	<b>ID</b>
Municipalidad de San José patent requirement	1
Land use authorization requirement	2
Ministerio de Salud authorization requirement	3
CCSS registration as employer requirement	4
Work risk insurance requirement	5
Tributación Directa registration requirement	6
Municipalidad de San José patent approval	7
Land use authorization approval	8
Ministerio de Salud authorization approval	9
CCSS registration as employer approval	10
Work risk insurance approval	11
Tributación Directa registration approval	12
Location and measurements	13
Electricity	14
Water	15
Refrigeration chambers -supplier comparison	16
Ovens-supplier comparison	17
Dough roller-supplier comparison	18
Mixer-supplier comparison	19
Cookware-supplier comparison	20
Refrigeration chambers -purchase	21
Ovens-purchase	22
Dough roller-purchase	23
Mixer-purchase	24
Cookware-purchase	25
Pastry and bakery products – supplier comparison	26
Beverages– supplier comparison	27
Coffee packages– supplier comparison	28
Pastry and bakery products – purchase	29
Beverages– purchase	30
Coffee packages– purchase	31
Packaged snacks– purchase	32
Client service interviews	33
Baker interviews	34
Marketing interviews	35
Procurement interviews	36
Finance interviews	37
Client service hiring	38
Baker hiring	39
Marketing hiring	40
Procurement hiring	41
Finance hiring	42
Control Checklist	43
Control Audit	44

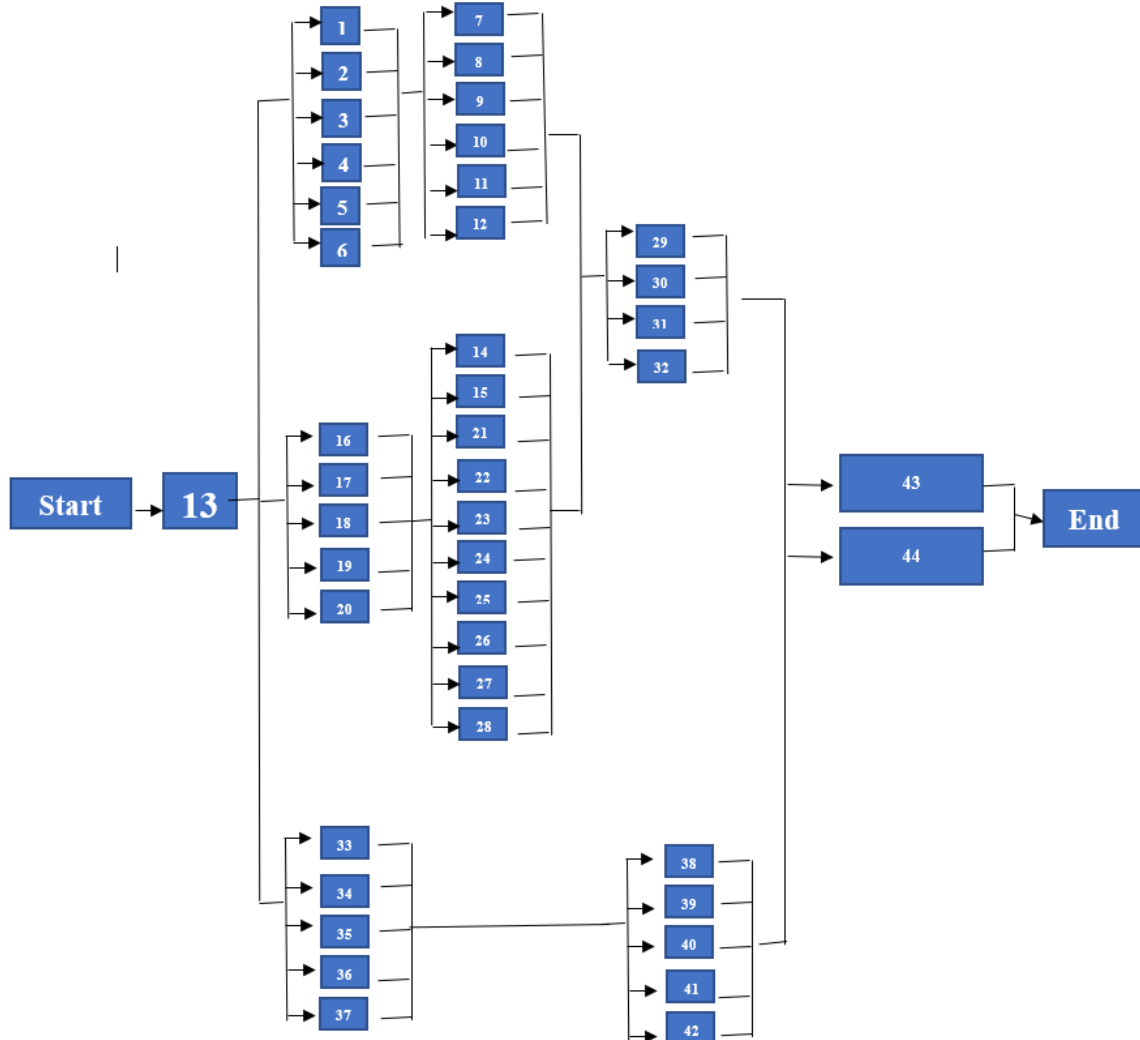


Figure 6. Activity Sequences. Source: Own elaboration.

#### 4.3.2. Activity Estimate Duration

“Is the process of estimating the number of work periods needed to complete individual activities with estimated resources. The key benefit of this is that it provides the amount of time each activity will take to complete” (PMI, 2017, p.195). Each activity has its duration; it could be years, months, weeks, days, hours, minutes, and even seconds. In this case, for the SP PMP, the SCHMP units of measure are days. The duration estimates were defined with the sponsors (SPO).

Chart 12. Duration of Activities. Source: Own elaboration.

Activity	Duration	Finish Date
Municipalidad de San José patent requirement	1	June 4, 2020
Land use authorization requirement	1	June 4, 2020
Ministerio de Salud authorization requirement	1	June 4, 2020
CCSS registration as employer requirement	1	June 4, 2020
Work risk insurance requirement	1	June 4, 2020
Tributación Directa registration requirement	1	June 4, 2020
Municipalidad de San José patent approval	45	July 20, 2020
Land use authorization approval	1	June 4, 2020
Ministerio de Salud authorization approval	45	July 20, 2020
CCSS registration as employer approval	30	July 6, 2020
Work risk insurance approval	1	June 4, 2020
Tributación Directa registration approval	15	June 18, 2020
Location and measurements	10	June 3, 2020
Electricity	7	June 10, 2020
Water	7	June 10, 2020
Refrigeration chambers -supplier comparison	5	June 8, 2020
Ovens-supplier comparison	5	June 8, 2020
Dough roller-supplier comparison	5	June 8, 2020
Mixer-supplier comparison	5	June 8, 2020
Cookware-supplier comparison	3	June 6, 2020
Refrigeration chambers -purchase	1	July 22, 2020
Ovens-purchase	1	July 22, 2020
Dough roller-purchase	1	July 22, 2020
Mixer-purchase	1	July 22, 2020
Cookware-purchase	1	July 22, 2020
Pastry and bakery products – supplier comparison	5	June 8, 2020
Beverages– supplier comparison	5	June 8, 2020
Coffee packages– supplier comparison	5	June 8, 2020
Packaged snacks– supplier comparison	5	June 8, 2020
Pastry and bakery products – purchase	1	July 21, 2020
Beverages– purchase	1	July 21, 2020
Coffee packages– purchase	1	July 21, 2020
Packaged snacks– purchase	1	July 21, 2020

<b>Activity</b>	<b>Duration</b>	<b>Finish Date</b>
Client service interviews	3	June 8, 2020
Baker interviews	3	June 8, 2020
Marketing interviews	3	June 8, 2020
Procurement interviews	3	June 8, 2020
Finance interviews	3	June 8, 2020
Client service hiring	2	July 24, 2020
Baker hiring	2	July 24, 2020
Marketing hiring	2	July 24, 2020
Procurement hiring	2	July 24, 2020
Finance hiring	2	July 24, 2020
Control checklist	1	July 29,2020
Control audit	2	July 30,2020

#### **4.3.3. Project Schedule and Critical Path**

The PMBOK Guide defines the project schedule as “an output of a schedule model that presents liked activities with planned dates, durations, milestones, and resources” (PMI, 2017, p.217).

The Harvard Business Review refers to the critical path as “a powerful but basically simple technique for analyzing, planning, and scheduling large, complex projects. In essence, the tool provides a means of determining which jobs or activities, of the many that comprise a project, are “critical” in their effect on total project time, and how best to schedule all jobs in the project in order to meet a target date at minimum cost.” (F. K. Levy, G. L. Thompson and J. D. Wiest, 1963). Refer to *Chart 13. SP Schedule and Critical Path*.

Chart 13. Schedule and Critical Path. Source: Own elaboration.

TAREA	ASIGNADO A	PROGRESO	INICIO	FIN	WW21	WW22	WW23	WW24	WW25	WW26	WW27	WW28	WW29	WW30	ww31
<b>Legal Documentation</b>			4-6-20	20-7-20											
Municipalidad de San José	Sponsor		4-6-20	4-6-20											
Land use authorization	Sponsor		4-6-20	4-6-20											
Ministerio de Salud	Sponsor		4-6-20	4-6-20											
CCSS registration as employer	Sponsor		4-6-20	4-6-20											
Work risk insurance	Sponsor		4-6-20	4-6-20											
Tributación Directa	Sponsor		4-6-20	4-6-20											
Municipalidad de San José	Sponsor		4-6-20	20-7-20											
Land use authorization	Sponsor		4-6-20	4-6-20											
Ministerio de Salud	Sponsor		4-6-20	20-7-20											
CCSS registration as employer	Sponsor		4-6-20	6-7-20											
Work risk insurance approval	Sponsor		4-6-20	4-6-20											
Tributación Directa	Sponsor		4-6-20	18-6-20											
<b>Store Space</b>			18-5-20	3-6-20											
Location and Measurements	Sponsor		18-5-20	27-5-20											
Electricity	Sponsor		27-5-20	3-6-20											
Water	Sponsor		27-5-20	3-6-20											
<b>Bakery Equipment</b>			27-5-20	22-7-20											
Refrigeration chambers -	Sponsor		27-5-20	1-6-20											
Ovens-suppliers comparison	Sponsor		27-5-20	1-6-20											
Dough Roller-suppliers	Sponsor		27-5-20	1-6-20											
Mixer-suppliers comparison	Sponsor		27-5-20	1-6-20											
Cookware-suppliers	Sponsor		27-5-20	30-5-20											
Refrigeration chambers -	Sponsor		20-7-20	22-7-20											
Ovens-purchase	Sponsor		20-7-20	22-7-20											
Dough Roller-purchase	Sponsor		20-7-20	22-7-20											
Mixer-purchase	Sponsor		20-7-20	22-7-20											
Cookware-purchase	Sponsor		20-7-20	22-7-20											
<b>Suppliers</b>			27-5-20	21-7-20											
Pastry and bakery products –	Sponsor		27-5-20	1-6-20											
Beverage– suppliers	Sponsor		3-6-20	8-6-20											
Coffee Packages– suppliers	Sponsor		3-6-20	8-6-20											
Packaged snacks– suppliers	Sponsor		3-6-20	8-6-20											
Pastry and bakery products –	Sponsor		20-7-20	21-7-20											
Beverage– purchase	Sponsor		20-7-20	21-7-20											
Coffee Packages– purchase	Sponsor		20-7-20	21-7-20											
Packaged snacks– purchase	Sponsor		20-7-20	21-7-20											
<b>Human Resource</b>			4-6-20	24-7-20											
Client Services Interviews	Sponsor		4-6-20	8-6-20											
Baker Interviews	Sponsor		4-6-20	8-6-20											
Marketing Interviews	Sponsor		4-6-20	8-6-20											
Procurement Interviews	Sponsor		4-6-20	8-6-20											
Finance Interviews	Sponsor		4-6-20	8-6-20											
Client Services Hiring	Sponsor		22-7-20	24-7-20											
Baker Hiring	Sponsor		22-7-20	24-7-20											
Marketing Hiring	Sponsor		22-7-20	24-7-20											
Procurement Hiring	Sponsor		22-7-20	24-7-20											
Finance Hiring	Sponsor		22-7-20	24-7-20											
<b>Quality control</b>															
Control Checklist	PM		29-7-20	29-7-20											
Control Audit	PM		29-7-20	30-7-20											

#### 4.3.4. Schedule Control Procedure

The control measures of the schedule are key to the project because they provide an idea of the project status to every person involved in the project (PM, sponsor, project team, etc.). The project schedule will be reviewed every week in order to reassess the progression, status, and make changes if required. These weekly meetings are set by the project manager, ensuring every stakeholder needed is going to assist to the meeting. Also, the project manager should send a report communicating the project status, changes, and actions required, including the task owners.



To control and have a visual tool to measure, control, and provide information about the efficiency of the project schedule, a schedule performance index will be developed. It is a measure tool to understand how close the project is to being completed compared to the schedule. (Institute of Civil Engineers, 2020).

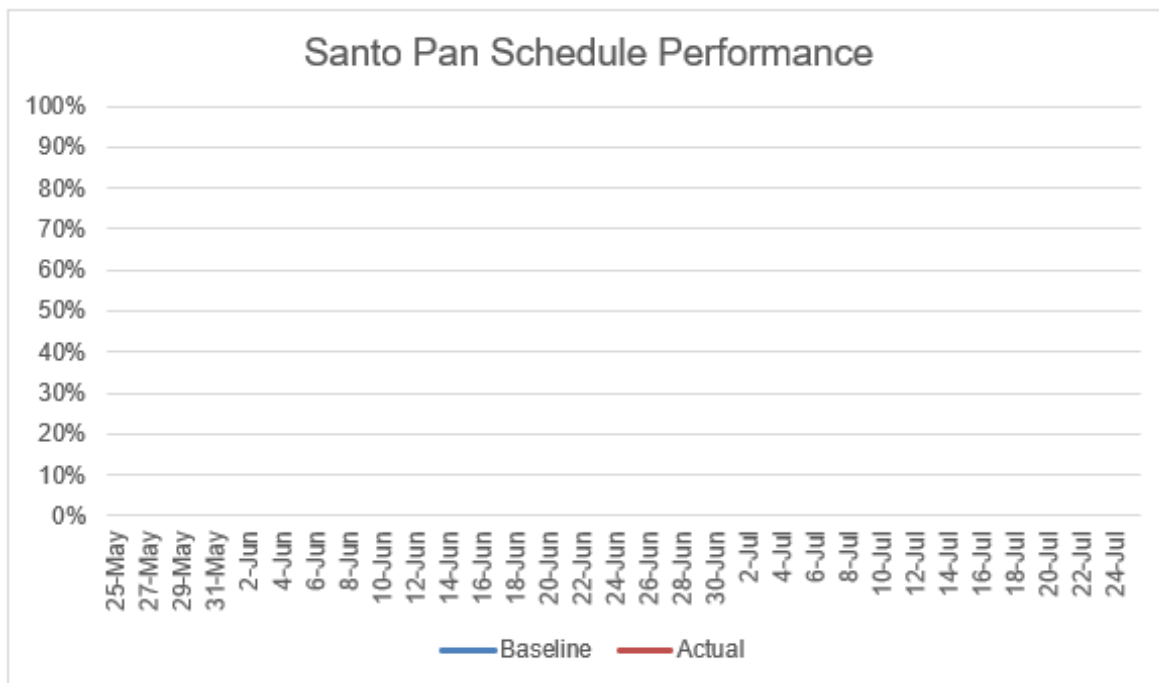


Figure 7. Schedule Performance. Source: Own elaboration.

#### 4.4. To create a COMP to ensure the project is within the budget

The PMBOK Guide defines the COMP as “the process of defining how the project cost will be estimated, budgeted, managed, monitored, and controlled.” (PMI, 2017, p.235). This section is based on meetings with the project sponsor and a market price overview to have a cost estimation for each activity. The unit of measure for the cost estimation is the United States Dollar (USD, \$).

##### 4.4.1. Activity Cost Estimates

The estimated cost is defined by The PMBOK Guide as “the process of developing and approximation of the cost of resources needed to complete project work.” (PMI, 2017, p.240). For the cost estimation, some activities might not have any cost to initiate, but they will do once the project ends; for example, the interviews

and hiring process of the employees might not have any cost during the project execution, but once the project finishes and the bakery starts running by itself, there will be a cost: monthly salaries.

*Chart 14. Cost of Activities. Source: Own elaboration.*

<b>Activity</b>	<b>Cost estimates</b>
Municipalidad de San José patent requirement	\$200
Land use authorization requirement	Free
Ministerio de Salud authorization requirement	\$60
CCSS registration as employer requirement	No payment required for the registration
Work risk insurance requirement	No payment required for the registration
Tributación Directa registration requirement	No payment required for the registration
Municipalidad de San José patent approval	No payment required
Land use authorization approval	No payment required
Ministerio de Salud authorization approval	No payment required
CCSS registration as employer approval	No payment required
Work risk insurance approval	No payment required
Tributación Directa registration approval	No payment required
Location and measurements	\$500
Electricity	\$200
Water	\$200
Refrigeration chambers -supplier comparison	No payment required
Ovens-supplier comparison	No payment required
Dough roller-supplier comparison	No payment required
Mixer-supplier comparison	No payment required
Cookware-supplier comparison	No payment required
Refrigeration chambers -purchase	\$2500
Ovens-purchase	\$2000
Dough roller-purchase	\$2000
Mixer-purchase	\$1000
Cookware-purchase	\$500
Pastry and bakery products – supplier comparison	No payment required
Beverages– supplier comparison	No payment required
Coffee packages– supplier comparison	No payment required
Packaged snacks– supplier comparison	No payment required
Pastry and bakery products – purchase	\$1000
Beverages– purchase	\$350
Coffee packages– purchase	\$150
Packaged snacks– purchase	\$150
Client service interviews	No payment required
Baker interviews	No payment required
Marketing interviews	No payment required
Procurement interviews	No payment required
Finance interviews	No payment required
Client service hiring	No payment required
Baker hiring	No payment required
Marketing hiring	No payment required
Procurement hiring	No payment required
Finance hiring	No payment required

#### 4.4.2. Project Budget

A project budget refers to all the costs/funds required to execute the project. It must be approved by the sponsors; it includes a cost baseline that “is the approved version of the time-phased project budget that includes contingency reserves but excludes management reserves.” (PMI, 2017, p.248). The PMBOK Guide refers to contingency reserves as: “contingency reserves are associated with the known-unknowns, which may be estimated to account for this unknown amount of rework.” (PMI, 2017, p.202).

Based on *Chart 14. Cost of Activities*, the total budget required for the project is \$10,810, but SPO refers as “obligatory” to have a reserve of \$5,000 (\$2,500 for the contingency reserve and \$2,500 for the management reserve), making a project cost baseline of \$15,810. (M. Calvo. Personal Communication. June 20, 2020).

**Cost Baseline=Cost Estimate + Contingency Reserve**

**\$10,810+\$2,500= \$13,310**

**Project Budget= Cost Baseline + Management Reserve**

**\$13,310 + \$2,500= \$15,810**

The contingency reserve will be saved in the Santo Pan bank account and will be used only in case of not having enough cash flow to make payments. To make use of it, the finance manager must first inform SPO of the situation and obtain their approval, they will take care of withdrawing the required amount. Once the payments have been made, a financial restructuring and implementation of new marketing techniques must be considered to increase sales and be able to continue making the payments but also to reimburse the money from the contingency reserve.

#### 4.4.3. Cost Control Procedure

The cost control procedures are key for the project because they help to maintain the project on budget and alert if the project is over or under-budget. The PMBOK Guide refers to the control costs as “the process of monitoring the status of the project to update the project costs and managing changes to the cost baseline”

(PMI, 2017, p.257). To control the SP project budget, the *Chart 15. Cost Control*, will be reviewed weekly by the accountant (SP finance staff member) in order to have a centralized document to include the invoices, register any change on the budget, and set the actuals of what was really used for each activity.

*Chart 15. Cost Control. Source: Own elaboration.*

<b>Activity</b>	<b>Cost estimates</b>	<b>Actuals</b>	<b>Changes</b>	<b>Invoice attachment</b>
Municipalidad de San José patent requirement	\$200	\$200	None	(Attachment)
Land use authorization requirement	Free			
Ministerio de Salud authorization requirement	\$60			
CCSS registration as employer requirement	\$0			
Work risk insurance requirement	\$0			
Tributación Directa registration requirement	\$0			
Municipalidad de San José patent approval	\$0			
Land use authorization approval	\$0			
Ministerio de Salud authorization approval	\$0			
CCSS registration as employer approval	\$0			
Work risk insurance approval	\$0			
Tributación Directa registration approval	\$0			
Location and measurements	\$500			
Electricity	\$200			
Water	\$200			
Refrigeration chambers -supplier comparison	\$0			
Ovens-supplier comparison	\$0			
Dough roller-supplier comparison	\$0			
Mixer-supplier comparison	\$0			
Cookware-supplier comparison	\$0			
Refrigeration chambers -purchase	\$2500			
Ovens-purchase	\$2000			
Dough roller-purchase	\$2000			
Mixer-purchase	\$1000			
Cookware-purchase	\$500			
Pastry and bakery products – supplier comparison	\$0			
Beverages– supplier comparison	\$0			
Coffee packages– supplier comparison	\$0			
Packaged snacks– supplier comparison	\$0			
Pastry and bakery products – purchase	\$1000			
Beverages– purchase	\$350			

Activity	Cost estimates	Actuals	Changes	Invoice attachment
Coffee packages– purchase	\$150			
Packaged snacks– purchase	\$150			
Client service interviews	\$0			
Baker interviews	\$0			
Marketing interviews	\$0			
Procurement interviews	\$0			
Finance interviews	\$0			
Client service hiring	\$0			
Baker hiring	\$0			
Marketing hiring	\$0			
Procurement hiring	\$0			
Finance hiring	\$0			

#### **4.5. To generate a QMP to incorporate the quality policy to ensure stakeholders' expectations**

The PMBOK Guide refers to the project quality management as “the process for incorporating the organizations quality policy regarding planning, managing, and controlling project and product quality requirements in order to meet stakeholders' objectives.” (PMI, 2017, p.271). The project quality management is consolidated by three processes: plan quality management, manage quality, and control quality.

The QMP refers to “the process of identifying quality requirements and/or standards for the project and its deliverables and documenting how the project will demonstrate compliance with quality requirements and/or standards.” (PMI, 2017, p.271).

##### **4.5.1. Quality Activities**

The quality activities refer to those activities required to achieve the quality expectations defined by the SPO. The definition of these activities was developed by a meeting with the PM and SPB owners. The outcome was not only the definition of these quality activities but also the frequency and the responsible of the task. Refer to *Chart 16. Responsibility Assignment Matrix*.

- **Daily:**

- To clean the work area before and after baking
- To review the quality of finished bakery products
- **Weekly:**
  - To review expiration dates
  - To review suggestions from clients (Set a suggestion box for clients to provide their feedback)
  - Staff meeting to review how the week was, share recognitions, and get help needed
- **Bi-weekly:**
  - To check the equipment status (ovens, mixer, dough roller, etc.)
- **Monthly:**
  - Finance report
  - Marketing report
  - Procurement report
- **Semestral:**
  - Training employees on bakery and safety techniques

*Chart 16. Responsibility Assignment Matrix. Source: Own elaboration.*

<b>Frequency</b>	<b>Role</b>	<b>Responsibilities</b>
Daily	Client service	To clean the work area before and after baking
	Baker	To review the quality of finished bakery products
Weekly	Procurement	To review expiration dates
	SPO	To review suggestions from clients (Set a suggestion box for clients to provide their feedback)
	SPO	Staff meeting to review how the week was, share recognitions, and get help needed
Bi-weekly	Baker	To check the equipment status (ovens, mixer, dough roller, etc.).
Monthly	Finance	Finance report
	Marketing	Marketing report
	Procurement	Procurement report
Semestral	SPO	To train employees on bakery and safety techniques

#### 4.5.2. Quality Control Procedure

Control quality refers to “the process of monitoring and recording the results of executing the quality management activities to assess performance and ensure the project outputs are complete, correct, and meet customer expectations.” (PMI, 2017, p.271).

The quality control procedures to be developed at SPB are a quality control checklist and quality audit, these are the metrics identified to compare against work done and verified that the project is in compliance for a manage quality point of view. A checklist refers to “a structured tool, usually component-specific, used to verify that a set of required steps has been performed or to check if a list of requirements has been satisfied.” (PMI, 2017, p.292). This checklist includes the activity and owner, divided in sections depending on the frequency (daily, weekly, bi-weekly, monthly, etc.). Refer to *Chart 17. Quality Checklist*; it will be executed by the SPO. Audits are “structured, independent, process used to determine if project activities comply with organizational and project policies, processes, and procedures.” (PMI, 2017, p.292). These audits will be developed by the SPO and undercover clients with a quarterly frequency. Refer to *Chart 18. Quality Audit Guide*.

*Chart 17. Quality Checklist. Source: Own elaboration.*

Activity	Responsible	Date	Completed	Comment
Clean the work area before and after baking	Client service	18/09/2020	✓	Clean and disinfected area
Review the quality of finished bakery products	Baker	18/09/2020	✓	
Review expiration dates	Procurement	20/09/2020	Not started	
Review suggestions from clients	SPO	30/09/2020	Not started	
Set the staff meeting	SPO	10/09/2020	✓	
Check the equipment status	Baker	08/09/2020	✓	
Present the finance report	Finance	30/09/2020	Not started	
Present the marketing report	Marketing	30/09/2020	Not started	
Present the procurement report	Procurement	30/09/2020	Not started	
Train employees on bakery and safety techniques	SPO	10/09/2020	✓	

Chart 18. Quality Audit Guide. Source: Own elaboration.

<b>Name:</b>	Pedro Rodriguez
<b>Date/Time:</b>	01/08/2020
<b>Area</b>	<b>Observations</b>
Client service	Very friendly staff
Bakery cleaning	Saw some flies
Product knowledge	Knows about the products and prices
Product presentation	Excellent
Product quality	Good flavor and fresh taste
Product variety	Does not have gluten free options
(Open for more areas depending on the situation)	

#### **4.6. To create a REMP to identify, acquire, and manage all resources needed in order to successfully complete the project**

The PMBOK Guide refers to REMP as: “the process of defining how to estimate, acquire, manage, and use team and physical resources.” (PMI, 2017, p.312). Without a doubt, the human factor is key to the good performance and fulfillment of the project goals. It is the people who generate quality products but also provide excellent customer service, creating a winning mix for customer loyalty.

##### **4.6.1. SP Resource Definition**

The PMBOK Guide refers to project team as “individuals with assigned roles and responsibilities who work collectively to achieve a shared project goal.” (PMI,2017, p.309). In order to define the project team roles, a meeting with the SPO was held, where the following question was raised: What are the team members needed for SPB?

- Baker – 1-position, full time
- Customer service– 1- position, full time
- Finance – 1 position, part time



- Marketing – 1 position, part time
- Procurement – 1 position, part time

The amount of team members was defined from their previous experiences and bakery expert references (bakery owners, friends of SPO), but they also mentioned that if the demand is greater and it is necessary to hire more personnel, they will do it, making a prior financial analysis. Refer to *Chart 16. Responsibility Assignment Matrix*, which includes the five SPB team roles and their responsibilities. The recommended organizational chart is the same as the one they already have. The SPO mentioned having a son with a business bachelor's degree; what usually happens on PYMES is that the employees are the family members, since in case of expense increasement, their son could cover the finances, marketing, and even procurement management. Also, in case of an increase in demand, it is recommended to consider hiring another baker.

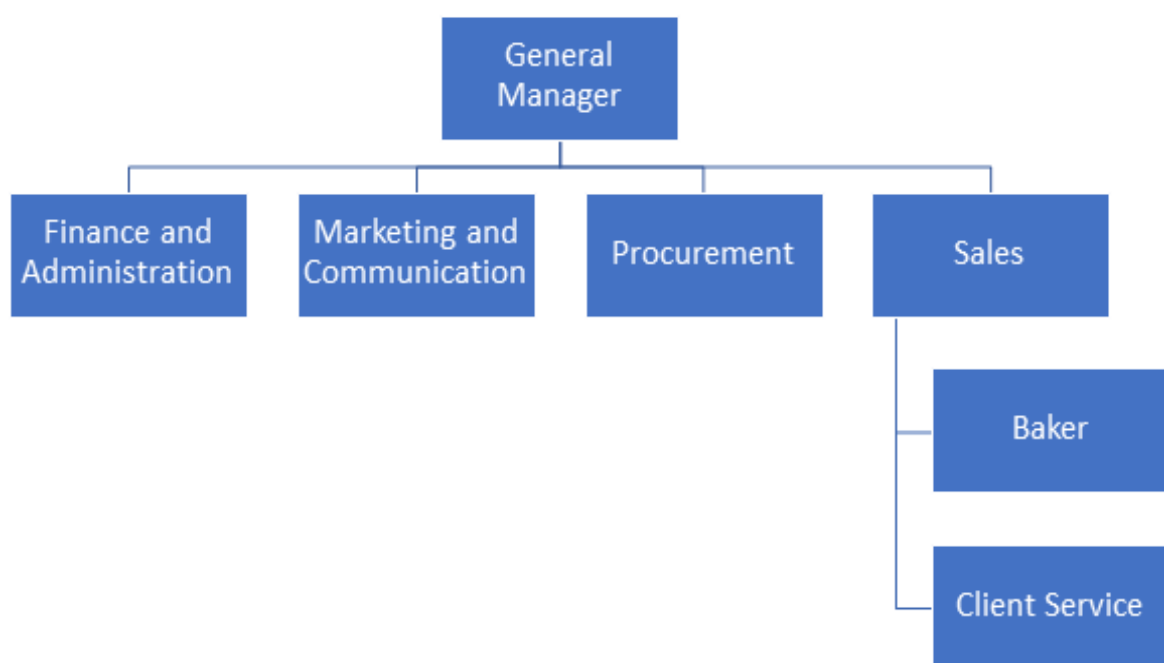


Figure 8. Organizational Structure. Source: Own elaboration.

### Responsibility Assignment Matrix

Chart 19. Responsibility Assignment Matrix. Source: Own elaboration.

Frequency	Role	Responsibilities
Daily	Client service	To clean the work area before and after baking
	Baker	To review the quality of finished bakery products
Weekly	Procurement	To review expiration dates
	SPO	To review suggestions from clients (Set a suggestion box for clients to provide their feedback)
	SPO	Staff meeting to review how the week was, share recognitions, and get help needed
Bi-weekly	Baker	To check the equipment status (ovens, mixer, dough roller, etc.).
Monthly	Finance	Finance report
	Marketing	Marketing report
	Procurement	Procurement report
Semestral	SPO	To train employees on bakery and safety techniques

#### 4.6.2. Staff Acquisition

Once the necessary roles for the project have been identified, the SPO will proceed to share on social networks and request references of possible candidates. Subsequently, they will be contacted by phone calls where the required tasks will be shared in order to know who meets the expectations; if so, an interview would be scheduled. The type of interview depends on the role; for example, for the customer service and baker roles, it is necessary to have a practical part and a behavioral interview. For the finance, marketing, and procurement positions, there will be a behavioral and technical interview. The SPO will hold a meeting to define the best option for each role; once identified, they will notify the chosen candidates and the ones who are not chosen.

#### 4.6.3. Training

The whole team will meet in order to get to know each other and meet the expectations as a team that the SPO have. The only two roles that will have training prior to starting their role will be customer service and the baker. For the finance, marketing, and procurement positions, it is expected that they already have the necessary knowledge; each will have a meeting to clarify details with the owners. The customer service training process will be based on dramatization, with possible

scenarios that can be faced, and they will work on the best responses. As for the baker's training, it requires to bake all the products that SP sells and be evaluated by the owners and other guests who will consider the taste, efficient use of ingredients, avoiding the waste of materials, etc.

#### **4.6.4. Recognition and Rewards**

At the end of each month, a meeting will be held with all the staff where different topics will be reviewed, such as the monthly company results, financial, marketing, and procurement reports, what was done well and should continue as well as areas for improvement and proposals to improve it, and a space for the SPO and the teammates to recognize the good work or "extra mile". Each quarter, there will be a team building activity to improve the dynamic as a team and "give a break" from work, where their families are invited.

#### **4.7. To develop a communication plan to ensure transparency and efficiency during the project**

Communication is the foundation of achieving the project goals; if one simple detail is miscommunicated, it could be reflected in a big impact. Effective communication builds a bridge between diverse stakeholders who may have different cultural and organizational backgrounds as well as different levels of expertise, perspectives, and interests. (PMI, 2017, p.361). The PMBOK Guide refers to plan communication management as "the process of developing an appropriate approach and plan for project communications activities based on the information needs of each stakeholder or group, available organizational assets, and the needs of the project." (PMI,2017, p.366).

##### **4.7.1. Internal Communication Approach**

The internal communication is focused on SP employees. The main communication channels will be the staff meetings and WhatsApp.

#### 4.7.1.1. Communication Schedule

SP will open from Monday to Saturday, and the fixed communication is on Mondays, where a motivational phrase or video will be shared to start the week and on Saturdays, to share what is seen in the staff meeting. The communication will be generated and shared by the SPO; if any design is required, they will ask the marketing staff member. The following figure is a template of the monthly internal communication schedule.

<b>SANTO PAN BAKERY</b> Communications schedule		PANADERÍA <b>Santo Pan</b> REPOSTERÍA		Month:	
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Kickoff weekly motivation		Open for internal communications			Weekly staff meeting
Kickoff weekly motivation		Open for internal communications			Weekly staff meeting
Kickoff weekly motivation		Open for internal communications			Weekly staff meeting
Kickoff weekly motivation		Open for internal communications			Weekly staff meeting
Kickoff weekly motivation		Open for internal communications			Weekly staff meeting

Figure 9. Internal Communication Schedule. Source: Own elaboration.

#### 4.7.1.2. Meeting Guideline

For the staff meetings, the following template will be used.

Chart 20. Meeting Minute Guideline. Source: Own elaboration.

<b>Date:</b> 08/09/2020			
<b>Attendance:</b> Juan, María, Paco, Lucía, and Rocío.			
<b>Agenda:</b> <ul style="list-style-type: none"> <li>• Birthday celebrations</li> <li>• Recognitions</li> <li>• Safety</li> <li>• Opens</li> </ul>			
<b>Topic</b>	<b>Owner</b>	<b>Comments</b>	<b>Action Required</b>
Birthday celebrations	SPO	Lucia´s birthday	
Recognitions	All	Juan recognized Rocío for...	
Safety	Paco	Paco shared the safety rules at the bakery.	All of them follow the safety rules.
Opens	All		
<b>Parking lot:</b> Paco- Free day required			

#### 4.7.2. External Communication Approach

The external communication is focused on customers and vendors. The main communication channel will be social media for customers and email for vendors.

##### 4.7.2.1. Communication Matrix

The communication will be generated and shared by the marketing staff member but approved by the SPO.

Chart 21. Communication Matrix. Source: Own elaboration.

Topic	Content	Format	Channel	Owner	Frequency
Products	Discover the deal we have for you!	Image	Facebook Instagram	Communication Manager	Weekly
Promotions	Discover the special offer of the month!	Image	Facebook Instagram	Communication Manager	Monthly
Staff	Meet the faces behind SP!	Video	Facebook Instagram	Communication Manager	Bi-weekly
Location	SP location, share Waze and Maps link	Image	Facebook Instagram	Communication Manager	Monthly

The following figure is a template of the weekly external communication schedule.

## SANTO PAN BAKERY

Marketing schedule WW:

NOTES:

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9am	Facebook post			Facebook post	
11am		Facebook post	Promotion post		Facebook post
1pm					
3pm			Facebook post		Instagram post
5pm	Instagram post	Instagram post		Instagram post	
7pm			Instagram post		

Figure 10. External Communication Schedule. Source: Own elaboration.

#### **4.7.2.2. Social Media**

“Social media is computer-based technology that facilitates the sharing of ideas, thoughts, and information through the building of virtual networks and communities.” (Dollahide, M., 2019). SPB will have a Facebook and Instagram page to increase brand awareness and engagement, managed by the marketing staff member.

### **4.8. To develop a RMP that outlines the project risk management approach from identifying to categorizing and effectively responding to project risks**

The RMP is considered the most important knowledge area. Every project is risky, but a good analysis will allow the project to reduce negative impacts and / or increase positive ones. The PMBOK Guide refers to plan risk management as “the process of defining how to conduct risk management activities for a project.” (PMI, 2017, p.401).

#### **4.8.1. Risk Breakdown Structure**

Refer to *Chart 22. Risk Breakdown Structure* in which the breakdown includes two levels. Level one refers to technical, external, management and commercial risks; level two develop different risks from each of the four risks mentioned in level one. The technical risk includes risks as the equipment failure due to the lack of maintenance, lack on the quality of the products and changes on requirements from the Municipalidad de San Jose. The external risk includes pandemics (such as COVID-19), changes on legislation (for example the taxes increasement), the status of the competition to understand why people continue preferring them and environmental disasters that could affect the business (for example floods).

The management risk includes five risks on level two, budget increasement due to the increasement of expenses, staff safety protocols, internal and external communication, miss any control required for the operations and the management of the contingency reserve. The last risk mentioned in level one is the commercial risk, which includes the conflict on contractual terms and conditions, delays on the delivery from suppliers and a poor client satisfaction.

Chart 22. Risk Breakdown Structure. Source: Own elaboration.

RBS Level 0	RBS Level 1		RBS Level 2	
Project Risk	1	Technical Risk	1.1	Bakery equipment maintenance
			1.2	Product quality performance
			1.3	Changes on requirements
	2	External Risk	2.1	Pandemics
			2.2	Changes on legislation
			2.3	Competition status
			2.4	Environmental disasters
	3	Management Risk	3.1	Project Budget Management
			3.2	Resourcing, staff safety
			3.3	Internal and external communication
			3.4	Lack on control - Operations Management
			3.5	Contingency Reserve management
	4	Commercial Risk	4.1	Conflict on contractual Terms and Conditions
			4.2	Delay on supplier's delivery
			4.3	Clients Satisfaction

#### 4.8.2. Probability and Impact Scales

Chart 23. Probability and Impact Scale. Source: Own elaboration.

Scale	Probability	Probability score	Impact on the project			
			Time	Cost	Quality	Impact score
Very high	>70%	0.9	>2 months	>5%	Very significant impact on the overall functionality	0.5
High	51-70%	0.7	1 month	3-< 4%	Significant impact on the overall functionality	0.4
Medium	31-50%	0.5	1-3 weeks	2-< 3%	Some impact in key functional areas	0.3
Low	11-30%	0.3	1 week	1-< 2%	Minor impact on the overall functionality	0.2
Very low	1-10%	0.1	1-5 days	1%	Minor impact on secondary functions	0.1
Null	<1%	0	No change	No change	No change in functionality	0



### 4.8.3. Probability and Impact Matrix

		Threats					Opportunities						
Probability	Very High 0.90	0.05	0.09	0.18	0.36	0.72	0.72	0.36	0.18	0.09	0.05	Very High 0.90	
	High 0.70	0.04	0.07	0.14	0.28	0.56	0.56	0.28	0.14	0.07	0.04	High 0.70	
	Medium 0.50	0.03	0.05	0.10	0.20	0.40	0.40	0.20	0.10	0.05	0.03	Medium 0.50	
	Low 0.30	0.02	0.03	0.06	0.12	0.24	0.24	0.12	0.06	0.03	0.02	Low 0.30	
	Very Low 0.10	0.01	0.01	0.02	0.04	0.08	0.08	0.04	0.02	0.01	0.01	Very Low 0.10	
		Very Low 0.05	Low 0.10	Moderate 0.20	High 0.40	Very High 0.80	Very High 0.80	High 0.40	Moderate 0.20	Low 0.10	Very Low 0.05		
		Negative Impact					Positive Impact						

Figure 11. Probability and Impact Matrix  
Source: PMI (2017, p.408).

#### 4.8.4. Risk Register

Chart 24. Risk Register. Source: Own elaboration.

RBS code	Cause	Risk	Consequence	P	I	Pxl	Trigger	Color classification
1.1	The right equipment maintenance is not developed.	Equipment failures	A delay to bake the products	0.5	0.4	0.20	Secondhand equipment	Yellow
1.2	Supplier failure in the quality of the required material	Poor quality materials	Products of lower quality, different size, or flavor	0.1	0.4	0.04	Supplier change	Green
1.3	Changes on requirements from Municipalidad de San José	Changes on requirements	Delay in the project completion	0.5	0.5	0.25	Change in government	Red
2.1	Pandemics	Changes in health measures	Temporary closure or selling restrictions	0.9	0.5	0.45	Change in government	Red
2.2	Changes on the legislation	Tax increase	More budget is required.	0.5	0.4	0.20	Change in government	Yellow
2.3	Location, prices, products, etc.	Clients' preference for the competition	Less income	0.5	0.4	0.20	Customer decrease	Yellow
2.4	Natural disasters	Environment disasters	Delay in project completion and lost resources	0.5	0.5	0.25	Natural disasters	Red
3.1	Expense increase	Budget increase	More budget is required.	0.5	0.3	0.15	Unusual expenses	Yellow
3.2	Poor safety procedures	Staff injury	Expense increase due to staff backup	0.1	0.2	0.02	Poor attention to processes	Green
3.3	Assumptions on the message	Internal and external communication	Misunderstandings or relationship problems	0.3	0.3	0.09	Misunderstandings	Yellow
3.4	Not including a step in the controls	Lack of control management	Delay in the project completion	0.3	0.4	0.12	Lack of control	Yellow

<b>RBS code</b>	<b>Cause</b>	<b>Risk</b>	<b>Consequence</b>	<b>P</b>	<b>I</b>	<b>Pxl</b>	<b>Trigger</b>	<b>Color classification</b>
3.5	Inappropriate use of the contingency reserves	Lack of contingency reserves	No contingency reserves for any emergency	0.5	0.5	0.25	Expenses increasement	Red
4.1	Lack of exceptions included	Conflict on contractual terms and conditions	Delay in the project completion	0.1	0.4	0.04	Poor communication	Green
4.2	Mechanical failure, traffic, etc.	Delay on the supplier delivery	Delay on the production	0.3	0.4	0.12	Traffic or vehicular restriction	Yellow
4.3	Lack of staff training	Poor client's satisfaction	Loss of customers	0.1	0.4	0.04	Customer decrease	Green

#### 4.8.5. Response Plan

Chart 25. Risk Response Plan. Source: Own elaboration.

RBS code	Risk	Response plan
1.1	Equipment failures	1.To identify the issue 2.To fix the equipment 3.To set a checklist control and reminder for maintenance
1.2	Poor quality materials	1.To inform the supplier 2.To ask for the agreed quality 3.If the quality continues to be poor, change the supplier.
1.3	Changes on requirements	1.To understand new requirements 2.To follow, complete, and submit requirements
2.1	Changes in health measures	1.To follow the Costa Rica Ministry of Health 2.To install hand sanitizer, plastic barriers, and a chlorinated carpet
2.2	Tax increase	1.To understand tax increase 2.To search for exceptions 3.To check and update the SP budget
2.3	Clients' preference for the competition	1.To understand why clients prefer other bakeries 2.To define if SP must apply changes or not 3.To define a strategy for new changes 4.To communicate changes with clients
2.4	Environment disasters	1.To call 911 2.Staff safety comes first; save their lives and, if possible, save materials 3.To understand the situation and impact
3.1	Budget increase	1.To identify the cause 2.To define if it needs to be paid or not 3.To redefine the SP budget
3.2	Staff injury	1.To cover the emergency with the emergency kit or call 911 2.To define if backup is needed 3. To apply prevention regulations and trainings
3.3	Internal and external communication	1.To understand the misunderstanding 2.To define the best way to communicate 3.To define the communication process
3.4	Lack of control management	1.To identify the lack of control 2.To add or update the control/checklist 3.To apply changes 4.To develop an AAR to review if another change is required
4.1	Conflict on contractual terms and conditions	1.To define the conflict 2.To contact a lawyer 3.To redefine the terms
4.2	Delay on the supplier's delivery	1.To understand the reason for the delay 2.To remind the supplier of the agreement 3.To consider the frequency of the delays and if they continue or change the supplier
4.3	Poor client satisfaction	1.To understand what poor client satisfaction means and recommendations 2.To compare the comments with what is happening at SP 3.To define the next steps considering recommendations, budget, resources, etc. 4.To share the improvements with clients

#### **4.9. To generate a PCMP to handle the purchase of materials or acquisition of services or results needed for the Project**

The PMBOK Guide defines the plan procurement management as “the process of documenting project procurement decisions, specifying the approach and identifying potential sellers. The key benefit of this process is that it determines whether to acquire goods and services from outside the project and, if so, what to acquire as well as how and when to acquire it.” (PMI, 2017, p.466).

##### **4.9.1. Supplier Approval Process**

The Cambridge Dictionary defines supplier as “a company, person, etc. that provides things that people want or need, especially over a long period of time.” (Cambridge Dictionary, n.d). The bakery material market is quite wide in Costa Rica, making the supplier selection an important step for the project, which is why each possible supplier must be investigated and analyzed before making a decision.

During the interview with the owners of SPB, it was mentioned that they have previous experience in the food service area, so they already have knowledge of suppliers with whom they have worked, but as part of the supplier approval process, a comparison of at least three suppliers will be developed. This comparison includes areas such as prices, delivery times, payment facilities, capacity to deliver the required quantity, after-sale service, guarantees, quality, and reputation.

First of all, the products that require suppliers must be identified; then at least three suppliers must be acknowledged per item in order to proceed with the supplier analysis. These steps must be developed by the SPO in order to include the options they already have and to be sure that the quality required is obtained.

Chart 26. Supplier Analysis. Source: Own elaboration.

Item	Area	Option 1 Doña Harina	Option 2 El Sabor	Option 3 Sumar
Item #1 flour	Price	\$200	\$170	\$150
	Delivery time	Every week	Every week	By-weekly
	Payment facilities	5 days	7 days	None
	Capacity to deliver the required quantity	Yes	Yes	Yes
	After-sale service	Follow up	None	Recipe sharing
	Guarantees	None	Return policy	None
	Quality	Good	Excellent	Good
	Reputation	Good	Excellent	Good

Once the supplier analysis is developed, the supplier selection is guided by the decision criteria determined by the SPO. The PMBOK Guide defines criteria as “standards, rules, or tests on which a judgement or decision can be based or by which a product, service, result, or process can be evaluated.” (PMI, 2017, p.703).

The decision criteria for SPB supplier selection is based on:

- Prices on budget or under budget
- Delivery time in less than three days
- High quality products
- Available return policy
- Product quantity availability
- Good reputation and reviews

After selecting the final suppliers, a meeting will be held with each vendor in order to establish the requirements for SPB orders (delivery dates, amount, prices, etc.) and inform about the control process by which they will be evaluated in each delivery.

#### 4.9.2. Procurement Control Procedure

The procurement control is key for the project because it is the process of obtaining the materials needed to generate incomes and maintain and grow the business. The PMBOK Guide refers to control procedure as “the process of managing procurement relationships; monitoring contract performance and making

changes and corrections as appropriate; and closing out contracts.” (PMI, 2017, p.492).

Each vendor will be evaluated with every delivery by the following criteria and using *Chart 27. Vendor Control*. The procurement staff member oversees the tracking for each vendor, marking with a “check” if the vendor fulfilled the delivery following the requirements and with a “cross” if they did not; in this case, a comment must be included with an explanation. A monthly meeting will be held with the owners of SP, the baker, and procurement and finance staff in order to review the results and analyze if they should continue with the same vendor.

*Chart 27. Vendor Control. Source: Own elaboration.*

Vendor: El Sabor	Date: 03/08/2020	
Criteria	Evaluation	Comment
Delivery date as planned	Yes	None
Complete requested amount	Yes	None
Product quality	Yes	None
Customer service	Good	The product was delivered with precaution.
Generated invoice	Yes	None
(Open for more criteria)		

#### **4.10. To create a SMP that ensures the proper identification and categorization of stakeholders with appropriate engagement strategies throughout the project**

The identification of stakeholders is key for any project. A stakeholder is “an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity or outcome of a project, program, or portfolio.” (PMI, 2017, p.723). The project stakeholder management includes four processes: identify stakeholders, plan stakeholder engagement, manage stakeholder engagement, and monitor stakeholder engagement.

#### 4.10.1. Stakeholder Identification

The stakeholder identification is “the process of identifying project stakeholders regularly and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success.” (PMI, 2017, p.503). To identify SP PMP stakeholders, a brainstorm was developed in order to identify internal and external stakeholders, as well as their impact and interest on the project. Refer to the following chart.

*Chart 28. Stakeholder List. Source: Own elaboration.*

ID	Stakeholder	Role	Impact (low, medium, high)	Interest (low, medium, high)
A	SPO	Project sponsor	High	High
B	Community-clients	Clients	High	High
C	Project manager	Project manager	High	High
D	Client service	Staff team member	High	High
E	Baker	Staff team member	High	High
F	Finance	Staff team member	High	High
G	Procurement	Staff team member	High	High
H	Marketing	Staff team member	High	High
I	Pastry and bakery product supplier	Supplier	Medium	Low
J	Beverage supplier	Supplier	Medium	Low
K	Coffee supplier	Supplier	Medium	Low
L	Packaged snacks supplier	Supplier	Medium	Low
M	Municipalidad San Jose	Legal document approver	High	Low
N	Bakerycompetition	Direct competition	Medium	Medium



#### 4.10.2. Stakeholder Analysis– Power/Interest Grid, Power/Influence Grid, and Impact/Influence Grid

Once the project stakeholders are identified, an analysis of their level of power, influence, interest, and impact will be developed through the power/interest grid, power/influence grid, and impact/influence grid. Those are techniques used to group the stakeholders depending on their levels (high or low) of the previously mentioned categories. To define the level of each stakeholder, a meeting with SP was developed. In this meeting, the sponsors suggested to make the categorization by role and not by stakeholder because for them, all their employees have the same level of importance as their suppliers.

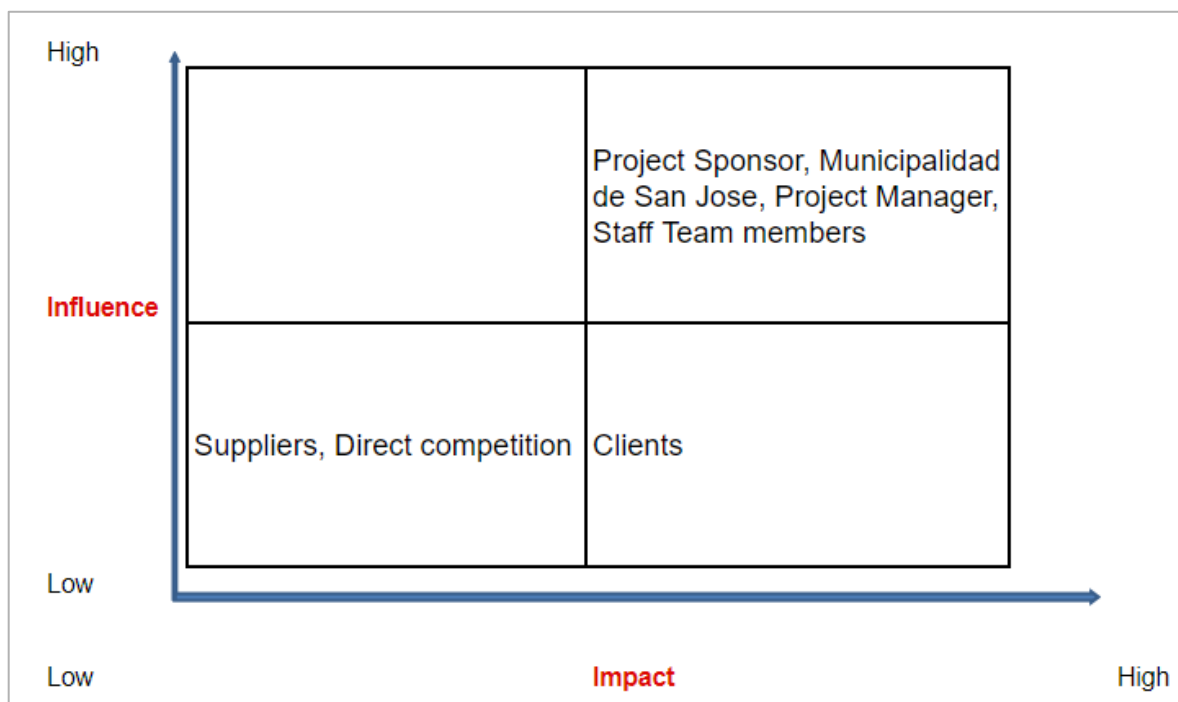


Figure 12. Impact/Influence Grid. Source: Own elaboration.

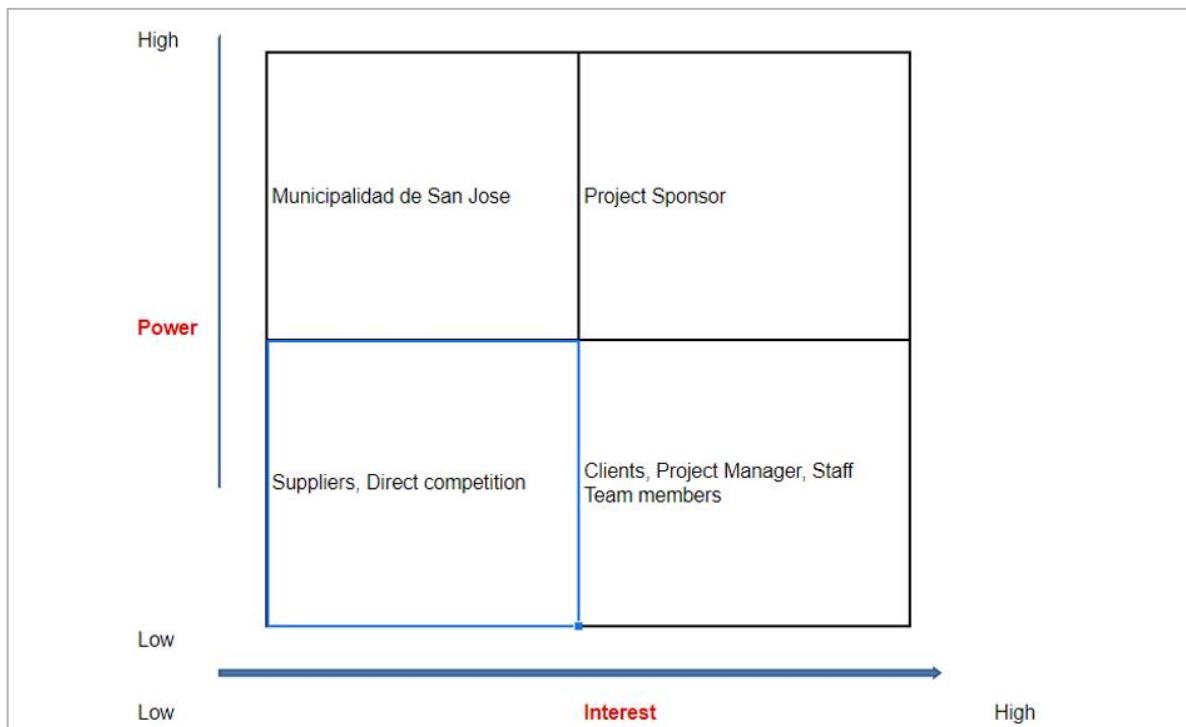


Figure 13. Power/Interest Grid. Source: Own elaboration.



Figure 14. Power/Influence Grid. Source: Own elaboration.

### 4.10.3. Stakeholder Roles and Responsibilities

Each stakeholder has a role and responsibilities in the project. The PMBOK Guide defines a role as “a defined function to be performed by a project team member, such as testing, filing, inspecting, or coding.” (PMI, 2017, p.721). Also, it defines responsibility as “an assignment that can be delegated within a project management plan such that the assigned resource incurs a duty to perform the requirements of the assignment.” (PMI,2017, p.720).

*Chart 29. Stakeholder Roles and Responsibilities. Source: Own elaboration.*

Stakeholder	Role	Responsibility
SPO	Project sponsor	<ul style="list-style-type: none"> <li>• To approve or deny decisions</li> <li>• To stay informed of the project</li> <li>• To define project success criteria</li> <li>• To maintain the priorities organized</li> <li>• To train employees on bakery and safety techniques</li> <li>• To set staff meetings</li> </ul>
Community-clients	Clients	<ul style="list-style-type: none"> <li>• To provide feedback of the product, client service, etc.</li> </ul>
Project manager	Project manager	<ul style="list-style-type: none"> <li>• To inform of the project process</li> <li>• To monitor the task completion</li> <li>• To provide a PMP for SPB</li> <li>• To track the project budget</li> <li>• To set meetings with the needed stakeholders</li> <li>• To document the requirements</li> <li>• To follow up on tasks</li> </ul>
Client service	Staff team member	<ul style="list-style-type: none"> <li>• To maintain the work area before and after baking clean</li> <li>• To welcome clients to the store</li> <li>• To offer promotions and products</li> <li>• To answer clients' questions in reference to the products</li> <li>• Cash register management</li> <li>• To pack requested products and give them</li> </ul>
Baker	Staff team member	<ul style="list-style-type: none"> <li>• To open the store</li> <li>• To bake the daily products on schedule</li> <li>• To review the quality of finished bakery products</li> <li>• To check the equipment status</li> </ul>

<b>Stakeholder</b>	<b>Role</b>	<b>Responsibility</b>
Finance	Staff team member	<ul style="list-style-type: none"> <li>• To present the finance report</li> <li>• To suggest financial improvements if needed</li> </ul>
Procurement	Staff team member	<ul style="list-style-type: none"> <li>• To present the procurement report</li> <li>• To review product expiration dates</li> <li>• To perform inventory reviews</li> <li>• To contact suppliers if more products are required</li> </ul>
Marketing	Staff team member	<ul style="list-style-type: none"> <li>• To present the marketing report</li> <li>• To review suggestions from clients</li> <li>• To maintain social media accounts active with daily posts</li> <li>• To reply to messages in no longer than 30min</li> <li>• To inform of new orders to the baker</li> </ul>
Pastry and bakery product supplier	Supplier	<ul style="list-style-type: none"> <li>• To provide supplies on time</li> <li>• To deliver the complete requested order</li> <li>• To deliver good quality materials</li> <li>• To inform if there are delays/changes at least 5 days before the original delivery date</li> </ul>
Beverage supplier	Supplier	<ul style="list-style-type: none"> <li>• To provide supplies on time</li> <li>• To deliver the complete requested order</li> <li>• To deliver good quality materials</li> <li>• To inform if there are delays/changes at least 5 days before the original delivery date</li> </ul>
Coffee supplier	Supplier	<ul style="list-style-type: none"> <li>• To provide supplies on time</li> <li>• To deliver the complete requested order</li> <li>• To deliver good quality materials</li> <li>• To inform if there are delays/changes at least 5 days before the original delivery date</li> </ul>
Packaged snacks supplier	Supplier	<ul style="list-style-type: none"> <li>• To provide supplies on time</li> <li>• To deliver the complete requested order</li> <li>• To deliver good quality materials</li> <li>• To inform if there are delays/changes at least 5 days before the original delivery date</li> </ul>
Municipalidad San Jose	Legal document approver	<ul style="list-style-type: none"> <li>• To deliver approvals on time</li> <li>• To provide information about the process</li> <li>• To inform if there is any issue</li> </ul>
Bakery competition	Direct competition	<ul style="list-style-type: none"> <li>• To stay informed of what the competition is doing</li> </ul>

#### 4.10.4. Stakeholder Management

All stakeholders are going to be managed by the following elements: active listening, empathy, and respect. The following chart explains the handling of each one in detail.

*Chart 30. Stakeholder Management. Source: Own elaboration.*

Stakeholder	Management
Project sponsor	<ul style="list-style-type: none"> <li>• Formal relationship</li> <li>• Maintain informed of the project</li> <li>• Involve in every decision they approve or reject</li> </ul>
Clients	<ul style="list-style-type: none"> <li>• Open-friendly relationship</li> <li>• Always willing to help and provide the best products and experience</li> <li>• Full product knowledge</li> </ul>
Staff team member	<ul style="list-style-type: none"> <li>• Open door relationship</li> <li>• Previously agreed processes and responsibilities</li> <li>• Involved in decisions</li> <li>• Promoted continuous learning</li> <li>• Informed and developed task control procedure</li> </ul>
Supplier	<ul style="list-style-type: none"> <li>• Formal relationship</li> <li>• Contract agreed by both sides</li> <li>• Informed and developed supplier control procedure</li> </ul>
Municipalidad San José	<ul style="list-style-type: none"> <li>• In-person transactions</li> <li>• Formal relationship</li> <li>• A signed copy of the documentation submitted will be required as backup.</li> </ul>
Direct competition	<ul style="list-style-type: none"> <li>• Informal relationship</li> <li>• Continuous study of the competition</li> </ul>

## CHAPTER V. CONCLUSIONS

1. The PC is the baseline to start planning the project. It includes the project processes, the start and end date, and the project objectives. Also, it indicates the project purpose, assumptions, constraints, preliminary risks, budget, milestones, and project stakeholders, as well as the project authorization.
2. Defining a SCMP refers to defining what the project requires to be completed and ensuring all work is included. For the SCMP definition, the WBS was developed, which helps to easily visualize the activities required by sub-dividing a big activity into smaller activities, which also provides more details with the WBS dictionary, providing a preview of expenses, resources, time, etc.
3. A schedule offers guidance on the project regarding what is happening as planned and what is not, raising the alert on budget, resources, etc. in order to proceed with the contingency plan. Also, it gives a realistic perspective for the project completion for a transparent communication with the stakeholders.
4. Without a doubt, one of the most recurrent topics touched in every conversation is the COMP. To define the project cost, an activity list with each cost estimated was developed, but as many changes could happen, a contingency reserve was also included in the total budget. A centralized control for costs that includes the estimation, actuals, change explanation, and invoice attachment section helps to provide a transparent budget management, and it is quicker to find information.
5. In bakeries, the QMP is key because if the quality of the products is not granted, no profit will be made. Quality goes beyond the products; a quality activity list was developed including the frequency and owner. Also, controls must be executed to guarantee quality and continue improving.
6. The project resources are the face of the project; it is required to define the responsibilities of each role to hire the best candidates. Even if the employees have previous experience, training sessions must be provided to minimize risks.

7. It is important to set a communication channel/ tool that every team member understands; if not, it could be a roadblock. Reports, agreements, celebrations, among others must be sent by a written channel to have a backup.
8. Projects are never 100% risk free, but with a RMP, the probability of it happening decreases. Defining the risks, their probabilities of happening, and the impact allows to open the eyes to different perspectives and leave aside the thought of "it will not happen to me".
9. It is necessary to define a PCMP to set the analysis and approval supplier process but also the control procedure guided by criteria defined by the SPO in order to keep or change the supplier.
10. Having a stakeholder list that includes the role, impact, and influence on the project helps to identify potential project impacts and to define a strategical approach to deliver the project.

## CHAPTER VI. RECOMMENDATIONS

1. SPO must set real and measurable objectives and milestones; if not, the progress of the project will not be as expected.
2. SPO must include any activity required to complete the project, however small it may be.
3. SPO should prioritize defining the schedule in order to set a time buffer in case of delays and not to affect the real limit delivery date.
4. SPO should initially define the cash they have for the project so that, when developing the COMP, they can make adjustments or approve the budget.
5. SPO must make a broad comparison of possible suppliers, at least three. They should not choose low quality materials or services, as it can have a high impact on the project.
6. Happy employees, happy customers that will prefer SP over other bakeries. SPO should invest in the safety, environment, and professional growth of their employees, as this influences their retention and the business growth.
7. Do not assume that everyone will understand a statement in the same way. The communication manager can share the communication with the SPO to have different perspectives. Once sent, SPO can verbally ratify what was communicated and see if they all understood the same thing.
8. SP staff should be constant in risk control procedures and document the action plans of those that are already known to be happening along the way.
9. An excellent relationship with suppliers must be maintained, but if there is a failure, the procurement manager must report it the first time and not wait for it to happen again.
10. The PM must keep stakeholders informed of the progress and share the needed help. It will make them want to get more involved in the project.



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## APPENDICES

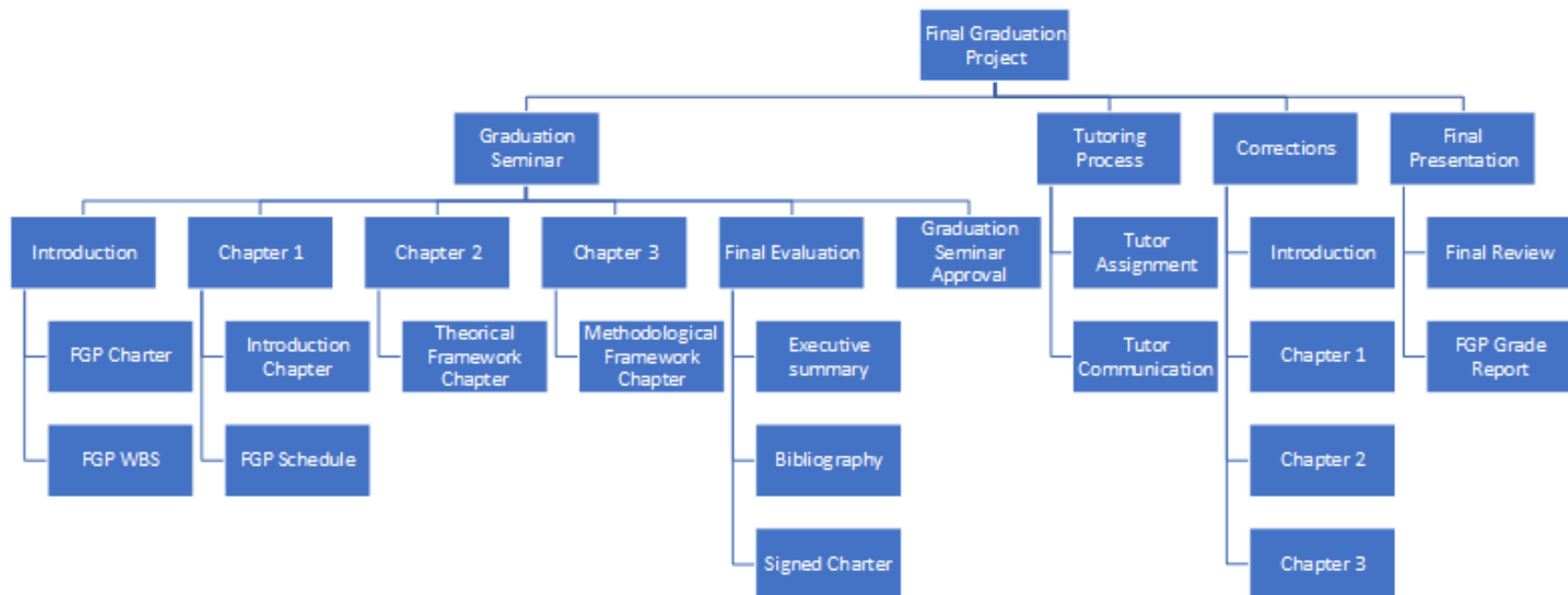
### Appendix 1. FGP Charter

<b>PC</b> <b>It formalizes the project start and confers the project manager with the authority to assign company resources to the project activities. Benefits: it provides a clear start and well defined project boundaries.</b>	
Date	Project name:
May 25, 2020	Project Management Plan for SPB
Knowledge areas / processes	Applicacion area (sector / activity)
<b>Knowledge areas:</b> <ul style="list-style-type: none"> <li>● Project integration management</li> <li>● Project scope management</li> <li>● Project schedule management</li> <li>● Project cost management</li> <li>● Project quality management</li> <li>● Project resource management</li> <li>● Project communication management</li> <li>● Project risk management</li> <li>● Project procurement management</li> <li>● Project stakeholder management</li> </ul> <b>Process groups:</b> <ul style="list-style-type: none"> <li>● Initiation</li> <li>● Planning</li> <li>● Execution</li> <li>● Monitoring and controlling</li> <li>● Closing</li> </ul>	Construction and facilities
Start date	Finish date
May 25, 2020	July 24, 2020
Project objectives (general and specific)	
<b>General objective:</b> To develop a project management plan for SPB in order to manage the opening of a new store based in Costa Rica	
<b>Specific objectives:</b> <ol style="list-style-type: none"> <li>1. To develop the PC and identify stakeholders in order to combine and coordinate the project activities</li> <li>2. To create the project scope management to ensure all work required is included in the project</li> <li>3. To define the activities, their sequence, and duration to manage the timely completion of the project</li> <li>4. To create a COMP to ensure the project is within the budget</li> <li>5. To generate the plan quality management to incorporate the quality policy to ensure stakeholders' expectations</li> <li>6. To identify the required products and services and acquire and purchase them</li> <li>7. To develop a communication plan to ensure transparency and efficiency during the process</li> <li>8. To identify potential risks and recommend control measures</li> <li>9. To generate a PCMP to handle the purchase of materials or acquisition of services</li> <li>10. To identify both internal and external stakeholders present in the project</li> </ol>	

<b>Project purpose or justification (merit and expected results)</b>		
To develop a project management plan for a new bakery in Costa Rica called SP; an organized document that includes key aspects of the project is highly important. Those key aspects include the process groups: initiation, to define the new project and obtain the permissions required; planning, to define the scope, objectives, and sequence of activities to achieve the objectives; execution of the activities defined; monitoring and controlling, in order to track and obtain feedback from what has been executed and proceed with the changes required; and closing, to formally complete the project.		
<b>Description of product or service to be generated by the project – project final deliverables</b>		
The project deliverable will be the project management plan for SPB in Costa Rica.		
<b>Assumptions</b>		
<ul style="list-style-type: none"> <li>• The project will be completed on time.</li> <li>• It will be developed by one resource, the project manager.</li> </ul>		
<b>Constraints</b>		
<ul style="list-style-type: none"> <li>• Resources: One head count (project manager)</li> <li>• Schedule changes</li> </ul>		
<b>Preliminary risks</b>		
<ul style="list-style-type: none"> <li>• The budget might increase.</li> <li>• Schedule changes</li> </ul>		
<b>Budget</b>		
Financial resources are required for the final presentation of the project.		
<b>Milestones and dates</b>		
<b>Milestone</b>	<b>Start Date</b>	<b>Finish Date</b>
<b>1. Introduction</b>		
1.1 FGP Charter	18-may-20	24-may-20
1.2 FGP Work Breakdown Structure (FGP WBS)	25-may-20	31-may-20
<b>2. Chapter 1</b>		
2.1 Introduction Chapter	18-may-20	24-may-20
2.2 FGP Schedule	18-may-20	24-may-20
<b>3. Chapter 2</b>		
3.1 Theoretical Framework Chapter	18-may-20	24-may-20
<b>4. Chapter 3</b>		
4.1 Methodological Framework Chapter	18-may-20	24-may-20
<b>5. Chapter 4</b>		
5.1 Results	25-may-20	21-jun-20
<b>6. Closure</b>		
6.1 Conclusions	22-jun-20	28-jun-20
6.2 Recommendations	22-jun-20	28-jun-20
<b>7. Final Evaluation</b>		
7.1 Executive Summary	22-jun-20	28-jun-20
7.2 Bibliography	18-may-20	28-jun-20
7.3 Signed Charter	25-may-20	31-may-20

<b>Relevant historical information</b>	
Not applicable	
<b>Stakeholders</b>	
<b>Direct stakeholders:</b> <ul style="list-style-type: none"> <li>• Tutor</li> <li>• FGP lecture</li> <li>• Project manager</li> </ul> <b>Indirect stakeholders:</b> <ul style="list-style-type: none"> <li>• Academic assistant</li> <li>• MPM-12 classmates</li> </ul>	
<b>Project manager: Mónica Morales Calvo</b>	<b>Signature:</b> 
<b>Authorized by: Marta Calvo Solano</b>	<b>Signature:</b>

## Appendix 2. FGP WBS



<b>WBS</b>	<b>Name</b>
<b>1</b>	<b>Graduation Seminar</b>
1.1	Introduction
1.1.1	FGP Charter
1.1.2	FGP WBS
1.2	Chapter 1
1.2.1	Introduction Chapter
1.2.2	FGP Schedule
1.3	Chapter 2
1.3.1	Theoretical Framework Chapter
1.4	Chapter 3
1.4.1	Methodological Framework Chapter
1.5	Final Evaluation
1.5.1	Executive Summary
1.5.2	Bibliography
1.5.3	Signed Charter
1.6	Graduation Seminar Approval
<b>2</b>	<b>Tutoring Process</b>
2.1	Tutor Assignment
2.2	Tutor Communication
<b>3</b>	<b>Corrections</b>
3.1	Introduction
3.2	Chapter 1
3.3	Chapter 2
3.4	Chapter 3
<b>4</b>	<b>Final Presentation</b>
4.1	Final review
4.2	FGP grade report



Appendix 3. FGP Schedule

Introduction			
FGP Charter	Project Manager	100%	18-5-20 24-5-20
FGP Work Breakdown Struc	Project Manager	60%	25-5-20 31-5-20
Chapter 1			
Introduction Chapter	Project Manager	100%	18-5-20 24-5-20
FGP Schedule	Project Manager	100%	18-5-20 24-5-20
Chapter 2			
Theoretical Framework Chapte	Project Manager	100%	18-5-20 24-5-20
Chapter 3			
Methodological Framework	Project Manager	100%	18-5-20 24-5-20
Chapter 4			
Results	Project Manager	0%	25-5-20 21-6-20
Closure			
Conclusions	Project Manager	0%	22-6-20 28-6-20
Recommendations	Project Manager	0%	22-6-20 28-6-20
Final Evaluation			
Executive Summary	Project Manager	50%	22-6-20 28-6-20
Bibliography	Project Manager	50%	18-5-20 28-6-20
Signed Charter	Project Manager	0%	25-5-20 31-5-20

## Appendix 4. MEIC- PYME Registration Form

<b>meic</b>				
<b>Dirección General de Apoyo a la Pequeña y Mediana Empresa (DIGEPYME)</b>				
<b>Registro PYME</b>				
<b>Declaración Jurada Trámite de Inscripción y Renovación</b>				
Teléfono 2549-1400 Apartado postal: 10216-1000 www.siec.go.cr Correo siec@meic.go.cr				
<b>I. Información General de la Empresa</b>				
<b>Nombre de la Persona o Empresa:</b>				
<b>Tipo de Identificación:</b> ( ) Física ( ) Jurídica		No. Identificación		Telefono:
<b>Documento de identificación:</b> Pasaporte( ) Cédula de identidad( ) Cédula de Residencia( ) Cédula Jurídica ( )				
<b>Tipo de persona Jurídica:</b> Sociedad Anónima ( ) Responsabilidad Ltda ( ) Comandita Simple ( ) Sociedad de Capital e Industria ( ) Sociedad de Hecho ( ) Empresa Unipersonal ( ) Otro:				
<b>Correo electrónico para notificaciones:</b>			<b>Página Web:</b>	
<b>Dirección Exacta de la Empresa:</b>				
<b>Provincia:</b>		<b>Cantón:</b>		<b>Región:</b>
<b>Sector al que pertenece la Empresa:</b> Industria ( ) Comercio ( ) Servicios ( ) Agropecuario* ( ) Otro ( )				
Para el Sector Comercio indique: Comercio Por Menor ( ) Comercio al Por Mayor ( )				
<b>Descripción de la Actividad Económica Principal</b> (En caso de tener más de una actividad indique porcentajes):				
<b>II. Información de los Personeros Legales (tanto para empresa física o jurídica en lo que corresponda)</b>				
<b>Representante Legal:</b>	Primer apellido:	Segundo apellido	Nombre completo	
<b>Tipo identificación:</b> Cédula Identidad ( ) Cédula Residencia ( ) Pasaporte ( )		<b>Número:</b>		
<b>Sexo:</b> Mujer ( ) Hombre ( )		<b>Fecha Nacimiento:</b>		
<b>Cargo que desempeña en la empresa:</b> Propietario ( ) Gerente ( ) Administrador ( ) Otro:				
<b>Tipo Poder:</b> Apod. generalísimo ( ) Apod. general ( ) Apod. Especial ( ) Representante judicial y extra judicial ( ) Desconocido ( )				
<b>Porcentaje de su participación accionaria en la empresa:</b>				
<b>Nivel Educativo:</b> Primaria ( ) Secundaria ( ) Técnico ( ) Diplomado ( ) Bachiller ( ) Licenciatura ( ) Posgrado ( )		<b>Carrera prof.:</b>		
<b>III. Información operacional de la empresa</b>				
<b>Fecha de constitución de la empresa ante el Registro Nacional:</b>			<b>Fecha de inicio de operaciones:</b>	
<b>Marcas registradas:</b>				
	<b>Descripción de los productos o servicios</b>	<b>Descripción de las Materias Primas, Insumos o Requerimientos</b>		
1				
2				
3				
4				
5				
<b>IV. Información obligatoria para registrarse como PYME</b>				
<b>Cantidad de Empleados Total:</b>		<b>Hombres:</b>	<b>Mujeres:</b>	
<b>Respecto al último período fiscal:</b>		<b>Cumple con los requisitos siguientes:</b>		
<b>Valor de Ventas Brutas</b>	<b>Total</b>	<b>Póliza de Riesgos del Trabajo</b>	SI	NO
<b>Valor de los Activos Fijos</b>		<b>Obligaciones tributarias</b>	SI	NO
<b>Valor de los Activos Totales</b>		<b>Cargas Sociales</b>	SI	NO
(*) Si la empresa pertenece al Sector Agropecuario, el registro se realiza en el Ministerio de Agricultura y Ganadería				
(Firma en señal de veracidad de la información, requerida cuando este documento se imprime en dos hojas separadas)				



V. Información General de Permanencia en el Mercado					
Es Proveedora del Estado:	SI ( )	No ( )	Participa o ha participado en Incubadora:	SI ( )	No ( )
Exporta:	SI ( )	No ( )	Tiene contratos en Firma con otras empresas:	SI ( )	No ( )
Es parte de una Franquicia:	SI ( )	No ( )	Seis o más meses de estar en el mercado:	SI ( )	No ( )
Empresario (a) con dos o más años experiencia en la actividad: SI ( ) No ( )					
<p>Los interesados deben velar por que los cambios en su información básica sean reportados a la DIGEPYME y anualmente deberán renovar los documentos presentados. El incumplimiento de la actualización de datos puede acarrear la exclusión del Registro PYME. Asegúrese de que la información solicitada se presente en forma completa. Los solicitantes que no cumplan los requisitos serán prevenidos y dispondrán de 10 días hábiles para completarlos. Transcurrido ese plazo, se archivará su gestión y no serán incluidos en el Registro PYME. Después de 5 días hábiles de presentados los documentos los interesados podrán verificar su correcta inclusión al Registro PYME. El MEIC podrá verificar la veracidad de estos datos y el proporcionar información falsa tendrá consecuencias legales para la empresa, además de ser excluida del registro y de los beneficios de la Ley 8262, Ley de fortalecimiento de la Pequeñas y Medianas Empresas.</p>					
<p>YO, _____ (Nombre y apellidos)</p> <p>representante legal o dueño interesado, <b>declaro bajo la FE de juramento</b>, que la información que brindo en la presente declaración es verídica y actual, estando consciente de los delitos de perjurio y falso testimonio.</p>					
Autorizo al MEIC a través de la DIGEPYME, a dar información a terceros, en lo que se refiere a datos como:				SI ( )	NO ( )
Nombre de la empresa, Nombre del representante Legal, número telefónico, Correo electrónico y dirección física					
Estoy de acuerdo en que el MEIC utilice los datos de mi representada con fines estadísticos				SI ( )	NO ( )
Firma del Propietario o Representante legal:			Fecha:		
<b>Uso Exclusivo de Digepyme (SIEC)</b>					
<b>Actividad Principal según CIU:</b>					
Sector de la Empresa:			Subsector de la Empresa:		
<b>Sección del Código CIU:</b>					
Sección:			División:		
Grupo:			Clase:		
Subclase:					
<b>Sección del Código UNSPSC:</b>					
Código de clasificación de ocho dígitos de productos y servicios para la clasificación de productos.					
Descripción en español del Código de clasificación.					
Código de clasificación de ocho dígitos de productos y servicios para la clasificación de materiales.					
Descripción en español del código de clasificación.					
Puntaje "P" obtenido por la empresa:			Tamaño de la Empresa:		
Nombre de Archivos Adjuntos:			Comentario para el archivo adjunto:		
<b>Observaciones:</b>					
Estado de Inscripción de la Empresa en el Registro PYME Aprobada ( ) Rechazada ( ) Archivada ( ) Devuelta ( )					
<b>NOTA IMPORTANTE: ESTE SERVICIO ES TOTALMENTE GRATUITO</b>					
El valor que debe colocar en la Casilla de Ingresos es el dato de la línea 35, en el caso del valor de los activos fijos corresponde a la línea 23, y el valor de los activos totales es el equivalente al de la línea 24 del formulario de la declaración del Impuesto sobre la Renta D-101. En caso de no presentar como requisito ese formulario debe indicar los datos estimados.					
Se debe indicar los datos del personero legal tanto si es personería física o jurídica. En el caso de persona física obviar datos de Tipo de Poder.					
En el caso del Sello PYME, se regula por lo dispuesto en el Decreto Ejecutivo No 38254 MEIC - 28-02-2014.					
Además de este Formulario firmado y debidamente lleno; para poder proceder con la Inscripción PYME, debe adjuntar al menos 2 de 3:					
1. Fotocopia de la última declaración del Impuesto sobre la Renta del último período fiscal (formulario D-101 ó D-105).					
2. Fotocopia de la planilla presentada ante la CCSSo comprobante de trabajador independiente según sea el caso.					
3. Fotocopia del pago de la póliza de riesgos del trabajo (último recibo cancelado vigente y que contenga la fecha).					
Los trámites de Inscripción por primera vez y de renovación los pueden realizar personalmente o en línea, mediante la página Web.					
Ley 8262: "Artículo 3"- Para todos los efectos de esta Ley y de las políticas y los programas estatales o de instituciones públicas de apoyo a las pymes, se entiende por pequeñas y medianas empresas (pymes) toda unidad productiva de carácter permanente que disponga de los recursos humanos, los maneje y opere bajo las figuras de persona física o de persona jurídica, en actividades industriales, comerciales, de servicios o agropecuarias que desarrollen actividades de agricultura orgánica.					

## Appendix 5. Proofreading Letter

San José, August 24, 2020

Universidad para la Cooperación Internacional (UCI)

To Whom It May Concern:

Natalia Alvarado Mata, identification number 305030705, Bachelor in English with a focus on translation, hereby states that the project titled: **Project Management Plan for SP Bakery**, carried out by Mónica Morales Calvo, has been revised.

The project was carried out to obtain the Master in Project Management (MPM) Degree. Aspects such as paragraph form, language quirks in written language, orthography, punctuation, and other aspects related to syntax and grammar were inspected and proofread. Therefore, taking into account the changes that were made, the project is ready to be presented.

Sincerely,

*Natalia Alvarado*



Natalia Alvarado Mata

English Translator and Proofreader

natalia.alvarado@filologos.cr

**NATALIA  
ALVARADO  
MATA (FIRMA)**

Digitally signed by NATALIA ALVARADO  
MATA (FIRMA)  
DN: SERIALNUMBER=CPF-03-0503-0705,  
SN=ALVARADO MATA, G=NATALIA, C=CR,  
O=PERSONA FISICA, OU=CIUDADANO,  
CN=NATALIA ALVARADO MATA (FIRMA)  
Reason: Filólogos CR  
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Date: 2020-08-24 17:20:14  
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