

Project Risk Report: Tax Efficient Retirement Planning

Risk Source	Probability			Impact			Result	Impact Areas			Mitigation / Response Plan	Status		
	Low	Medium	High	Low	Medium	High		Cost	Schedule	Performance				
1	Keeping on track	Geoff B.		5				9	45	X	X		<p>We will maintain sufficient documentation to plan our timeline of deliverables and deadlines. We will continue to monitor and update this timeline to ensure that we stay on track.</p> <p>In addition, we will use task organizing and collaboration tools that will allow the whole team visibility of project progress or lack thereof.</p>	Active
2	Tax database could become quite complex	Geoff B.		5				7	35	X	X	X	<p>We will use schema planning tools (ERD) as well as existing SQL query analysis tools.</p> <p>The schema planning tools will identify any conflicts we may have as well as if our schema is becoming overly complex through excessive quantities of or excessively large tables.</p> <p>The SQL query analysis tools will identify the types of joins that are being used when creating a dataset to return. Developing queries with things in mind such as the number of derived vs static table joins or number of indexed columns will help us reduce the query time.</p>	Pending
3	Don't acquire testable data set in time for R1	Piper C.	3					8	24		X	X	Remind Steve about our need for the data set.	Closed
4	Integration of individual system components	Piper C.			7	3			21		X	X	Work from the beginning of the 1040 Form down. That is, start integrating personal info before adjusted gross income. Ensure that the integration is fully tested before proceeding to the next component.	Closed
5	Late Acquisition of VM	Geoff B.			8	2			16		X		We will ask for updates periodically to not only keep ourselves aware of the situation but also to show our concern by presenting ourselves as "the squeaky wheel"	Closed
6	Learning Tax Terms and Implications	Geoff B.			7	2			14		X		We will retain open communication with the customer. We will also have several resources we can resort to which have sufficient examples and definitions explaining various situations.	Active

7	Communication amongst teammates	Geoff B.	2			5		10		X		We will maintain open communication through Slack.com as well as indirect communication through project management software (maintaining tasks). We will also meet at least three times per week and adjust as necessary to meet our goals and deadlines.	Closed
8	Clear agenda for sponsor meetings	Geoff B.	1			3		3		X		We will discuss the agenda for sponsor meetings as a team prior to the meeting itself. We will document the agenda in a consistent manner and present it to the sponsor prior to each meeting.	Closed

Risk Item Details

	Risk	Date Created	Created By	Date Updated	Updated By
1	Keeping on track	09/14/2015 8:09AM	Geoff Berl	09/14/2015 4:24PM	Sean Dolan
2	Tax database could become quite complex	09/14/2015 8:07AM	Geoff Berl	09/17/2015 5:24PM	Sean Dolan
3	Don't acquire testable data set in time for R1	10/22/2015 5:39PM	Piper Chester	12/16/2015 3:35PM	Piper Chester
4	Integration of individual system components	12/16/2015 3:37PM	Piper Chester	12/16/2015 3:37PM	Piper Chester
5	Late Acquisition of VM	09/14/2015 8:01AM	Geoff Berl	09/30/2015 3:08PM	Piper Chester
6	Learning Tax Terms and Implications	09/14/2015 7:58AM	Geoff Berl	09/14/2015 7:58AM	Geoff Berl
7	Communication amongst teammates	09/14/2015 8:12AM	Geoff Berl	12/16/2015 3:35PM	Piper Chester
8	Clear agenda for sponsor meetings	09/14/2015 8:14AM	Geoff Berl	12/16/2015 3:35PM	Piper Chester

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