

## Context

The CEO of *Project Management Consultants Pty Ltd* (PMP) has been in dialogue with members of the newly formed Tropical Retreats Group (TRG) regarding their intent to modernise information systems facilities across their Barrier Reef resorts. *PMP Consultants* (with their solid reputation for project competence) has been invited to prepare a project briefing paper for the TRG Board covering initial planning for their new Guest Hospitality System (GHS). If the anticipated report is clear, detailed and complete TRG have suggested that this could not only form the basis for a first engagement but potentially lead to an ongoing and much longer-term business arrangement:

1. A proposal for the two companies to jointly develop the GHS and associated software. A success with this initial venture could prompt a long-term partnership offer for *PMP* to help TRG fulfil a range of other (still confidential) projects. These significant joint activities would become a lucrative (and high profile) income stream for *PMP* over the next 5 years, plus give a competitive advantage over rival consultancies still unaware of the aggressive scale of TRG's intended expansion... or richness of their client list.
2. An exceptional submission has potential to see the *PMP* CEO offered a non-executive Directorship on Tropical Retreats Group Board of Directors. With a similar existing position on the Board of a well-known sports club, he regards this potential new appointment as an excellent opportunity for further personal networking within elite sectors of the high-class resort, hotel and casino industries.
3. TRG's parent company, Recreation Amalgamated Holdings (RAH), is considering a 'preferred supplier' arrangement with a proven information technology consultancy. The chosen firm would not just provide expertise and service to one subsidiary (such as TRG) but act as primary technology consultant/advisor to the entire conglomerate. This opportunity is potentially worth tens of millions of dollars for the enterprise selected. Exhibiting superior proficiency in working with TRG could make *PMP* eligible for the appointment.

Professionalism and thoroughness in the project management briefing report is important for both the future of *PMP* and to its CEO personally.

## CASE STUDY

### Tropical Retreats Group (TRG)

#### Background

In early 2023, a collection of venture capital investors and small-to-medium sized recreation firms examined the possibility of amalgamating to provide an umbrella company for the easy management of large-scale health and holiday resorts around Australia. They decided to form Recreation Amalgamated Holdings (RAH) - a major publicly listed corporation dedicated to the provision, rollout and management of recreation services around the country. From this formation, and numerous subsequent acquisitions of other high value firms in its target markets, the parent corporation now has five autonomous and substantially funded divisions: Tropical Retreats Group; Snowy Mountains Resorts Group; Everyday Fitness Group; Southern Golf Group; and Nouveau Event Creations Group. Although strategic directives and annual profit targets are issued by RAH, each division has its own Board of Directors, internal operations structure, independent decision making and profit/loss accountability – thus, operating as wholly-owned commercial subsidiaries within their individual industry segments.

Recently, due to the wide-ranging disparity of systems and capability inherited from its mergers and acquisitions, RAH has prioritised the development of a suitable integrated infrastructure to administer the day-to-day needs of patrons and staff and to better monitor and provide services to its chain of resorts, golf courses and health centres. The subsidiary covering tropical getaways, Tropical Retreats Group (TRG), has been given the go-ahead as the first of the five divisions to be modernised. To meet the timeline issued by their parent company, TRG feel that design of the appropriate information systems architecture (and development of associated tools) should be outsourced to an experienced consulting group with a record of successfully integrating diverse information needs with the latest technological advances. The selected consulting firm would lead the upgrade program under TRG oversight – and potentially access other RAH divisions once the initial program with TRG has been deemed successful.

Currently Tropical Retreats has leaseholds on four islands located within Queensland's Great Barrier Reef. These include Brampton and Daydream Islands for those seeking luxury, Heron Island as an eco-holiday for nature lovers and Orpheus Island which specialises as a sanctuary for honeymooners, executive retreats and those wishing more privacy and exclusivity. Tropical Retreats prides itself on providing vacationers a relaxing and friendly holiday with very high quality facilities, a range of available leisure activities and knowledgeable and responsive staff. Most resorts operate 11 months of the year excepting Brampton which, as the most southerly and largest resort in the group, operates all year round. March to early April can be the height of cyclone season when heavy rainfall can sometimes occur over its more northern locations, so Tropical Retreats likes to use this cyclic 'downtime' to train staff, upgrade infrastructure, introduce new facilities and conduct needed maintenance with minimal intrusion or inconvenience to patrons. The resorts themselves offer a range of holiday activities including reef/island day-cruises, scuba diving and snorkelling, feeding of wild dolphins, sailing, horse riding, rainforest bush walking and so on. Such activities can be either regularly scheduled group events or private bookings with personal guide/instructors. Child minding is available across all resorts except Orpheus which generally excludes children under 16 except in very special circumstances. TRG sees its biggest advantage over

competitors as its reputation for exclusivity, security and providing of a positive and very indulgent atmosphere for patrons to just relax and de-stress. Orpheus in particular has something of a name as a nice escape for those owning a public profile but wishing to step out of the spotlight for a time. TRG works hard to maintain brand-recognition for high quality leisure so customer safety, security, enjoyment and service are paramount.

So, viewing itself as unique, TRG has decided that a bespoke information development project (as opposed to purchasing a package) is its best option towards improving service. However, they openly state that **they are not information systems project experts**. Thus, as a starting point, they have engaged *PMP Consultants* to prepare a Briefing Paper outlining work estimates, resourcing and preliminary planning for building a robust Guest Hospitality System (GHS) using typical project management disciplines. While it is understood that the firm contracted for actual development may have their own methodology for ensuring successful delivery, TRG hope that this initial Project Briefing Paper will allow their oversight of that process to be an informed one. A preliminary budget of \$2,500,000 has been allocated to the GHS project, however the TRG Managing Director has emphasised that money is less important than time and quality - the system must be easy to use, fully developed/tested and in use across all four resorts by May 2027, prior to peak season.

### Objectives for the Proposal

To improve the leisure experience by automating, integrating and simplifying a number of manual processes currently requiring human intervention and/or where the existing service is inconsistent across the different island resorts. At a minimum this should encompass:

1. Simplified holiday booking;
2. Simplified management of Guest information, membership details and tailored itineraries;
3. Guest registration for a variety of day cruises, tours, scheduled leisure events, etc.
4. Management of child care and supervised activities for the young;
5. Member interaction with specialist staff (e.g. instructors/guides for private lessons and tours);
6. Online purchases of goods from a resort catalogue;
7. TRG management of competitions and demonstration events;
8. Sponsorship details for a variety TRG run events and competitions (e.g. sailing, water skiing, etc.).

Although initially targeted at island resorts under TRG management, an ideal solution would also be adaptable (with some customisation) to operations within other venues such as recreation parks and holiday resorts both local and international.

### Initial Scope

TRG has resolved to issue a development contract for a new state-of-the-art, automated and integrated Guest Hospitality System (GHS) to largely replace disparate individual methods currently in use. They envisage the new system will allow for:

- *An integrated online Guest reservation and payment system*. This will allow vacationers to directly check availability and reserve holiday accommodation at any of the four TRG-owned resorts, make required payments and to schedule transport from the nearest domestic airport to the island of their choice using local ferry and/or seaplane commuter services. There is also a specialised valet helicopter/seaplane service available for those willing to pay

for a more exclusive amenity to their resort destination. A number of different payment options should be provided including credit card (VISA/Mastercard), PayPal, BPay or direct debit from a nominated bank account;

- *Integrated account management.* Operating as simple customer relationship management (CRM) system this would allow Guests to check account balances, update personal details, review itineraries and activity bookings, be notified of special events/offers plus other items of special interest. It would also allow TRG to monitor Guest usage trends which could then be used for marketing, mailing lists and events planning. Access to information by patrons should be by secure link to the Tropical Retreats website and by mobile app;

- *Guest activity and equipment hire.* An online portal through which guests can self- register for day cruises, tours, regularly-scheduled leisure events as well as relaxation therapies (e.g. personal massage, meditation/yoga, spa treatment, beauty therapy). Guests can also reserve, at no charge, resort equipment such as diving gear, wind-surfers, sail boats, kayaks, bicycles or electric buggies, etc. (booking length varies by equipment type and can go from hourly in the case of a sail boat up to the entire duration of the holiday for bicycles).

- *Child care.* Where applicable, children can be booked into resort day-care facilities or, for a fee, personal valet child-supervision service by accredited child-care professionals can be arranged (N.B. child care not available on Orpheus Island);

- *Exclusive lessons.* Using either mobile app or kiosk terminals situated in reception areas, Guests can self-book private lessons, personal tuition and guide services with a professional instructor for different leisure or sports pastimes (e.g. scuba, horse-riding, sailing, surfing). Fees vary by activity and consultant availability within the different resorts;

- *Purchase of merchandise.* An online store where people can purchase clothing, souvenirs and other items from a standard TRG catalogue. Payment is made at order time with goods either directly delivered to an in-resort location or shipped to a nominated address via standard mail, express mail or courier (for heavier items). This module should accept VISA, Mastercard and PayPal and use stored account details where appropriate to maximise purchaser convenience;

- *Competition management.* Permits TRG to set up competitions and events (e.g. surfing, sailing, water-skiing, treasure hunts, etc.) simply and effectively within any of their resorts. This should include event details, prizes, participant registration and results, ranking in order of merit for team and individual participants plus placement against past standings. Likely applications would be for corporate recognition events as well as local professional competitions;

- *Sponsorship management.* Sponsorship details for competitions, demonstrations and events should be captured, maintained and managed for the different resorts. This will permit appropriate sponsorship tracking as well as local advertising associated with special events;

- *Maintenance.* The whole Guest Hospitality System must be easily upgradeable, robust and scalable. It should be easily extendable to other locations that may be placed under TRG at a future date. If the GHS is successful within TRG, then variants may be approved for use by other recreation divisions within the RAH corporate family. This is by no means an exhaustive list. *PMP Consultants* should include any supplementary scope items in their report if such are judged essential to the Guest Hospitality System final product.

Currently, preparation of the Tropical Retreats Request-for-Tender is not complete. TRG anticipate the Request-For-Tender document will be released to a list of information / consulting firms by end December 2025 with selection of a winning bid by mid-February 2026. The appointed provider should have the project underway no later than July 2026 and with a preliminary 'go live' targeted for early April 2027 – the end of the rainy season when most patrons are not present and while the majority of permanent hospitality, administration and support staff are available for training. Full operation across all four resorts should be in place no later than 3<sup>rd</sup> May 2027 to prepare for the June peak.

### **Out of Scope Components (i.e. not to be addressed in your Project Briefing Document)**

While some items might need to be later considered for the actual project when it is commissioned, they are not of immediate interest to the Board. Therefore, for the purposes of the Briefing Paper, the following items are known to be out of scope:

- Buildings, space and general office fit-out for the Project and its staff;
- Administration staffing and support personnel not directly engaged in Project development;
- Back office, financial and other systems not directly related to the GHS project development;
- Sourcing of 'non-IT' hardware as kiosk units and scoreboards (this will be done by a separate negotiation direct with hardware vendors);
- Provisions for issues and risk related to legislation, environment, land and governing bodies (e.g. Tax Laws, Immigration Laws, Property Development applications, etc).

### **Additional Notes (some possible project considerations identified)**

At the last monthly meeting of the TRG Board certain items relating to the proposed Briefing Paper were discussed. After the meeting, the CEO of *PMP* had an informal discussion with the Board Secretary and wrote down some bullet points over coffee regarding areas regarding areas of importance to the Board. These notes are made available below although the *PMP* CEO has not assessed their relevance to preparation of the Project Briefing Paper – they are almost certainly incomplete, may not be relevant to immediate project decisions and are not in any set order. However, the *PMP* CEO has provided them to help provoke thought about items that **might** influence project decisions or be included in the plan as added-value elements:

1. Sourcing, modifying and installing kiosk hardware;
2. Preparation of a list of fees for all resort-coordinated activities, hires and equipment purchases;
3. Finding and fit-out of a GHS project location;
4. Maintenance of TRG staff records including instructor/guide shifts and schedules;
5. Negotiations with owners of resort locations on Hayman and Lady Elliot Islands are progressing and an agreement-in-principle for acquisition of these enterprises by TRG is expected by the end of 2026. In addition, the management company for Green Island has let Tropical Retreats know that it is considering divesting itself of its Green Island investments and has given TRG first option to purchase these assets. If all negotiations are successful then

it could potentially put three additional island resorts and their infrastructure under TRG management by mid-2027.

6. Planning, development and integration of:

- Smart swipe cards to store Guest information;
- Appropriate fall-back procedures to replace or bypass faulty kiosk terminals;
- Business continuity and disaster recovery planning for any potentially catastrophic event;
- A mobile phone application (mobile app) to easily check reservations, activity bookings and equipment hires (and possibly other selected details);
- Co-existence with, or replacement of, all existing TRG island resort websites;
- Integration with Queensland State Government systems to confirm liaison, audit and status of TRG compliance with wilderness and environmental statutes pertaining to the Great Barrier Reef and island locations under TRG care;
- Back-office accounting systems, including HR and payroll, for project staff;
- Backup processes for all data captured in relation to the new Guest Hospitality System;
- Data mining and modelling software for ongoing system analysis and improvement;
- Robust security and system software to protect the entire TRG operation.

7. Set up contracts for ongoing maintenance of hardware and software once the project is complete;

8. Complete testing of all components to analyse reliability, ease of use, repair and replacement;

9. Alternate data processing sites (i.e. a fall-back in case the main processing site fails);

10. Some allowance can be made for selected travel of business analysts on fact-finding tours of the different resorts. These on-site visits are not to be considered 'holidays'. While the majority of project work is still to be negotiated the main team will be likely be based in either Brisbane (where TRG is headquartered) or Sydney (where PMP is located) - a recommendation would be valued. All project accommodation/travel is to be paid out of the approved GHS project budget;

11. A separate 'non-project' travel/accommodation budget could be made available by TRG for all key project members to travel to, and personally inspect/review, post-implementation operations of the completed and working GHS at one of the island resorts for one full week. This week would be concluded by a formal project closure and recognition event at the island location. However, such activity will only be scheduled *after* the final GHS project deliverable has been approved and accepted by the TRG Board and validated as being of a high quality;

12. Satisfactory testing of the disaster recovery plan;

13. A charge/id card RFID system is being considered to allow guests linked to a larger group to identify general placement of other members of their party. Via a network of polling sensors near frequented locations (e.g. beaches, restaurants, scenic trails, buildings, resort pathways, etc.) patrons using strategically situated kiosk terminals can check last-known location of another guest's id card as it passes within range of a scanner. Steps can then be taken to reunite with specific individuals (particularly useful for parents tracking down

wandering children). This could be offered as an additional resort service with activation available on request;

14. A system warranty period of 120 days after successful completion and GHS go-live would be looked upon favourably by TRG;