INITIATING THE PROJECT

THE PROJECT CHARTER

| Elements	Definitions and Instructions
Project Name	Enter a brief name to describe the project.
Project Sponsor	This person is responsible for budgeting the funds to undertake the project and has final authority to approve project completion.
Business area project manager	This person is responsible for the business unit's project-related activities.
Project Manager	This is the person responsible for planning and managing the project.
Other participants	In addition to the sponsoring business area, indicate other business groups that will have crucial project responsibilities.
Business Background	Give an overview of the business reasons for the project.

THE PROJECT CHARTER (CONT.)

| Elements	Definitions and Instructions
Project Scope	Using business terminology, give a general description of the project scope (provide details in the following sections). Indicate both what is within the anticipated scope and what is outside the scope. Consider these topics: • Systems • Infrastructure • Communications • Business locations
Objectives	Using business terminology, list specific, anticipated business objectives of the project.
Deliverables	List the specific, expected project deliverables and how these will meet the objectives. The deliverables should be as tangible as possible.

THE PROJECT CHARTER (CONT.)

Elements	Definitions and Instructions
Constraints	List factors that will limit the project team's options. For example, a predefined budget range is a constraint that is very likely to limit the team's options regarding project scope and staffing levels.
Assumptions	List factors or situations that you will assume for the purpose of project planning. For example, if the availability date of a key resource is uncertain, the team should make a reasonable assumption about the date of availability and list this as an assumed factor in the plan.

PROJECT CHARTER
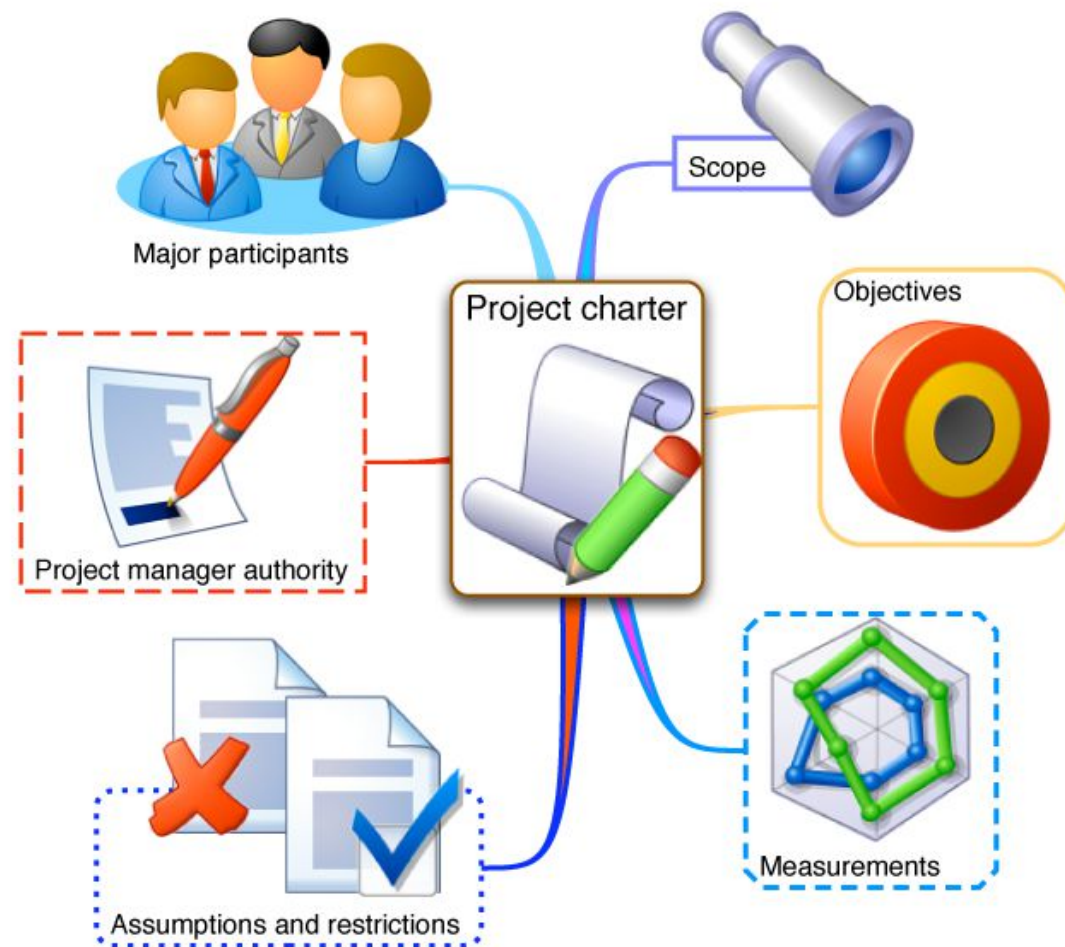
ENGAGING THE STAKEHOLDER

STAKEHOLDER MANAGEMENT PROCESS

Identify → Plan → Manage → Control
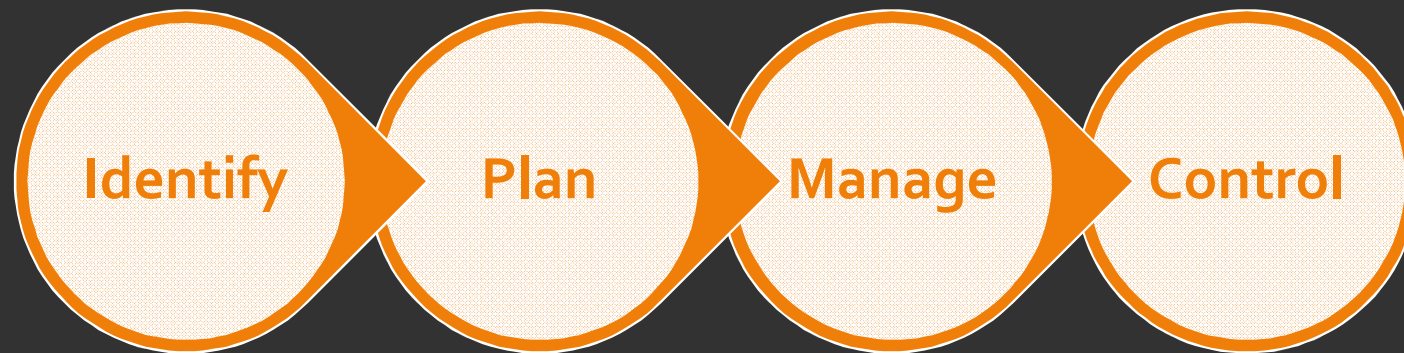
Stakeholder Management Process

KNOW YOUR STAKEHOLDERS AND CONSISTENTLY AND HONESTLY COMMUNICATE WITH THEM

"Ultimately, your key stakeholders decide whether you have been successful or not. You have to keep them informed so that you can mange their expectations. So the first order of business is to define the Who, What, When, and How's related to these most important people. Who are your key stakeholders? What information do they need to know? When do they need to know it? And how do they want to receive that information?" – P. Gretchen, Program Manager, Honeywell

KEY STAKEHOLDERS

Managing stakeholders–and their expectations–is a key to project management success.

PMs are trained to pay a lot of attention to the *triple constraints of quality, schedule, and budget*, and it goes without saying that those elements are important.

KEY STAKEHOLDERS

The following were commonly cited recommendations to meet this core/minimum level of stakeholder expectation management and build that trust:

Know Your Stakeholders

Consistency of Communication

Honesty & Transparency of Communications

PROJECT REPOSITORY DOCUMENTS

DOCUMENTS FOUND IN A PROJECT REPOSITORY	
✓ Scope statement	✓ Resource plan
✓ Statement of Work (SOW)	✓ Communication plan
✓ WBS	✓ Risk management plan
✓ WBS Ddctionary	✓ Roles and responsibilities
✓ Schedule	✓ Requirements documents
✓ Assumptions list	✓ Budget
✓ Organization chart	✓ Quality plan
✓ Change control plan	✓ Design documents
✓ Procurement plan	✓ Standards and procedures
✓ Status reports	✓ Lessons learned
✓ Meeting information	✓ Action logs
✓ Risk logs	✓ Issue logs
✓ Change requests	✓ Closeout reports

KICK OFF MEETING

FEW TIPS FOR AN EFFECTIVE KICK OFF MEETING AGENDA

1. The kickoff meeting **should not be booked for more than 60 mins.**

2. Use a presentation/template or any other document to ensure you have a proper agenda.

3. Set an expectation that the plan and other details may change.

4. **Key reason of this project kick off meeting is to make everyone aware of their role and tasks .**

5. Invite all the key stakeholders from business and project team members to the meeting.

6. Dry run your presentation and agenda with project sponsor and some senior team members before the actual kick off meeting for feedback.

7. **Do not get into detailed discussions around scope, delivery or risks in the kick off meeting.**

8. Circulate the soft copy after the meeting so that people who missed the meeting can read.

9. **You can get most of the content from Proposal, Plans and Risk Management Plan.**

10. **Be open to feedback as the team can suggest better ways of doing things.**

11. Take a few hard copies of the presentation to the kick off meeting in case projector in the meeting room does not work.

CONTENTS

- Introduction to the project.
- Project Deliverables.
- Project Team.
- Project Timeline.
- Communications Plan.
- Key Project Risks.
- Technical Contacts & Escalation Process.
- Project Closure Terms.
- Project Documentation.

INTRODUCTION AND PROJECT DELIVERABLE SECTIONS IN THE KICK OFF MEETING TEMPLATE

1. This is the first section in the kick off meeting template and the goal of having this it to give a high level view of the project and its purpose/benefit to the business.

2. The information on this slide should be precise and having them in bullet format will make it readable.

3. **The slide may contain project start date and end date, teams involved within the business and include the sponsor name or department.**

4. **Similar to the introduction of the project the project deliverable should contain information about what the project will be delivering. Again keep it high level.**

INTRODUCTION TO THE PROJECT

- The main aim of the project BRMS is to replace the current manual risk management process with an automated process.

- The project will start in July 2015 and conclude by December 2015.

- The project will consist of teams from Technology, Risk Assessment and Quality Assurance.

- Sponsor of the project is Thomas Ternn and the project is funded out the technology budget.

- The BRMS system will be developed in partnership with our preferred vendor www.techno-blogger.com.

PROJECT DELIVERABLES

- Automated business rules.

- Integrate with the current customer application and existing billing system.

- Provide a user friendly interface.

- Train Business Users.

- User Training Guide.

- Parallel support to the old and new systems for 3 months duration.

PROJECT TEAM STRUCTURE

1. It is important the project team is **aware of the team structure and there is no better time than doing it in a kick off meeting.**

2. Generally, IT teams are well structured and there is always clear hierarchy but it is still a good practice to have the team structure documented and circulated.

3. There are project control, analysis, development, SME and configuration management teams clearly defined.

4. **Providing this information in the kick off meeting ensures that people know who to go when there is an issue or question.**

5. Visibility of the team structure plays an important role in making the team communication effective.

Project Team

Project Control

Swapnil Wale
Project Manager

Tom Ternn
Sponsor

Dick Smith
Project Co-Sponsor

Rediel Smith
Project Control Member

Analysis

Gale Tuck
Lead Business Analyst

Richard Matt
Business Analyst

Development Team

Rimi Senha
Development Lead

Ruchi Sharma
Senior Developer

Richie Cob
Oracle DBA

Randy Michel
BRMS Expert

Ricky Gutt
BRMS Expert

Quality Assurance

Eric Dake
Quality Assurance Manager

Zuber Khan
QA tester

Michel Mitch
QA Tester

SME

Richie Garret
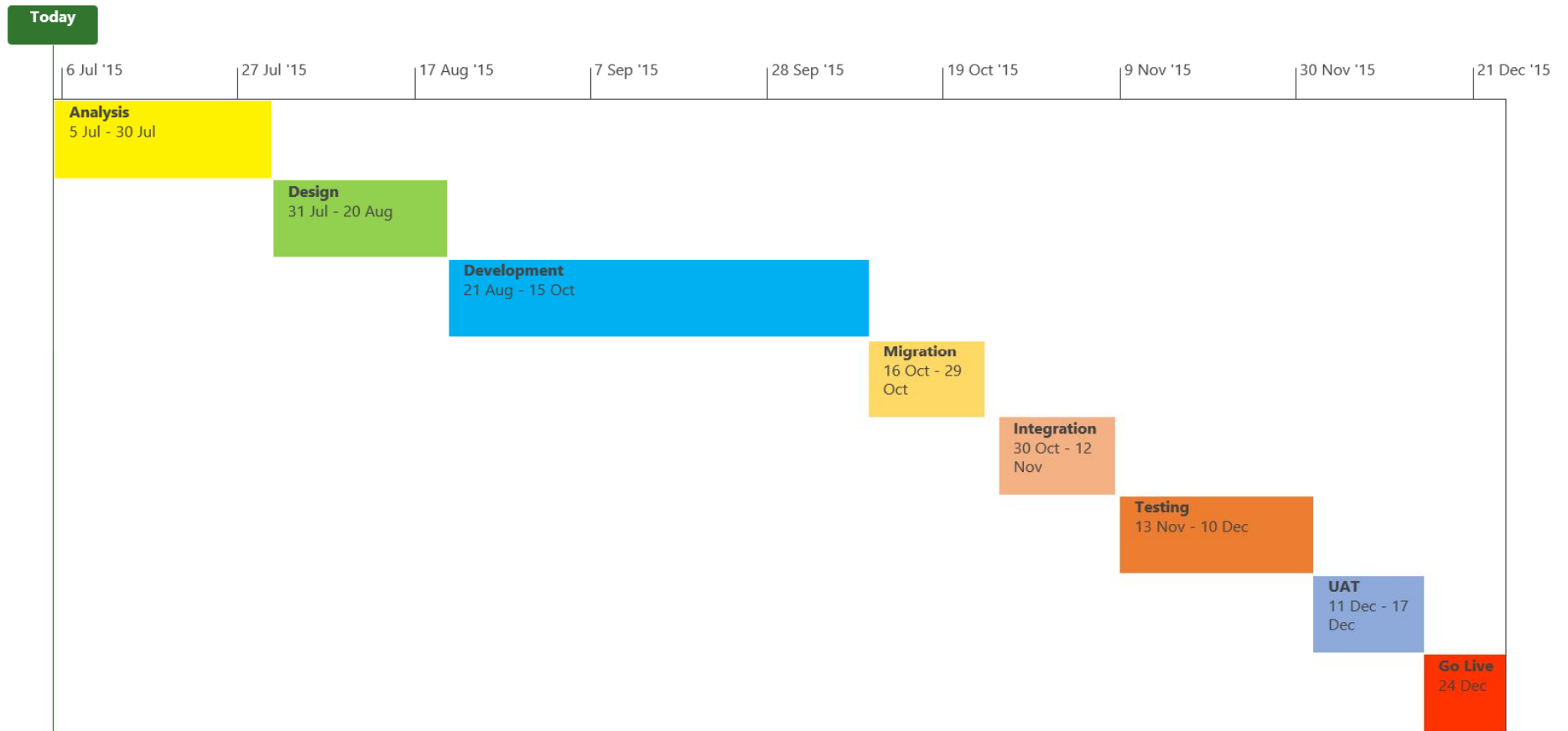Risk Assessment SME

Rachel Paul
Risk SME

Configuration Management

Shen Kimi
Configuration Lead

PROJECT TIMELINE

1. The project timeline helps the team to **understand the project delivery time frame.**

2. **The timeline in the kick off meeting should be for high level phases.** Adding too much detail can cause confusion within the team and can cause communication issues.

3. You can use a simple Gantt or fancy excel timeline or even a set of dates may work.

4. **Try and highlight the key milestones in the time line so that the team will be aware of them.**

PROJECT TIMELINE

6 Jul '15 | 27 Jul '15 | 17 Aug '15 | 7 Sep '15 | 28 Sep '15 | 19 Oct '15 | 9 Nov '15 | 30 Nov '15 | 21 Dec '15

Analysis
5 Jul - 30 Jul

Design
31 Jul - 20 Aug

Development
21 Aug - 15 Oct

Migration
16 Oct - 29 Oct

Integration
30 Oct - 12 Nov

Testing
13 Nov - 10 Dec

UAT
11 Dec - 17 Dec

Go Live
24 Dec

PROJECT COMMUNICATIONS PLAN

1. Managing communications or comms is a difficult task as not everyone communicates in the same fashion.

2. The kick off meeting is an excellent opportunity for the project manager to set the expectations about how the project team should be interacting with each other.

3. In the below image and in the template there is a sample plan as to how the project team, stakeholders and business departments will be informed about the project activities.

4. Common examples are Scrum Meetings, Project Team Meetings, Project Status Report, Project Update Meeting, Project Control Meeting and Quality Assurance Report.

COMMUNICATIONS PLAN

Communication Type	Owner	Frequency	Agenda
Scrum Meeting	Project Manager	Daily	Update from everyone on – • What was done yesterday? • What is the plan for tomorrow? • What are your obstacles?
Project Team Meeting	Project Manager	Weekly	• Discuss the project progress. • Discuss upcoming milestones. • Review the risk and issues log. • Discuss upcoming leave plans. • Any other business.
Project Status Report	Project Manager	Weekly	Status update on the key project parameters Schedule, Budget, Risks, Issues and Benefits.
Project Update Meeting	Project Manager	Weekly	60 mins one-on-one meeting with Project Sponsor for a full project update.
Project Control Meeting	Project Sponsor & Project Manager	Monthly	Status update on the key project parameters Schedule, Budget, Risks, Issues and Benefits. And seek guidance on decisions required.
Quality Assurance Report	Quality Assurance Manager	Daily	A list of defects count, open/close status published on a daily basis after testing is commenced.

KEY PROJECT RISKS

1. Before starting a project it is important that **all the stakeholders are aware of the key risks within the project.**

2. Project Kick Off Meeting is a **good opportunity for discussing the risks** that can affect the project.

3. Do not include all the risks. **Only include the key or major/high risks.**

4. Each risk should have a description, category, rating, owner and possible mitigation.

5. It is possible that during the kickoff meeting the team **may come up with new risks which were not discussed before.**
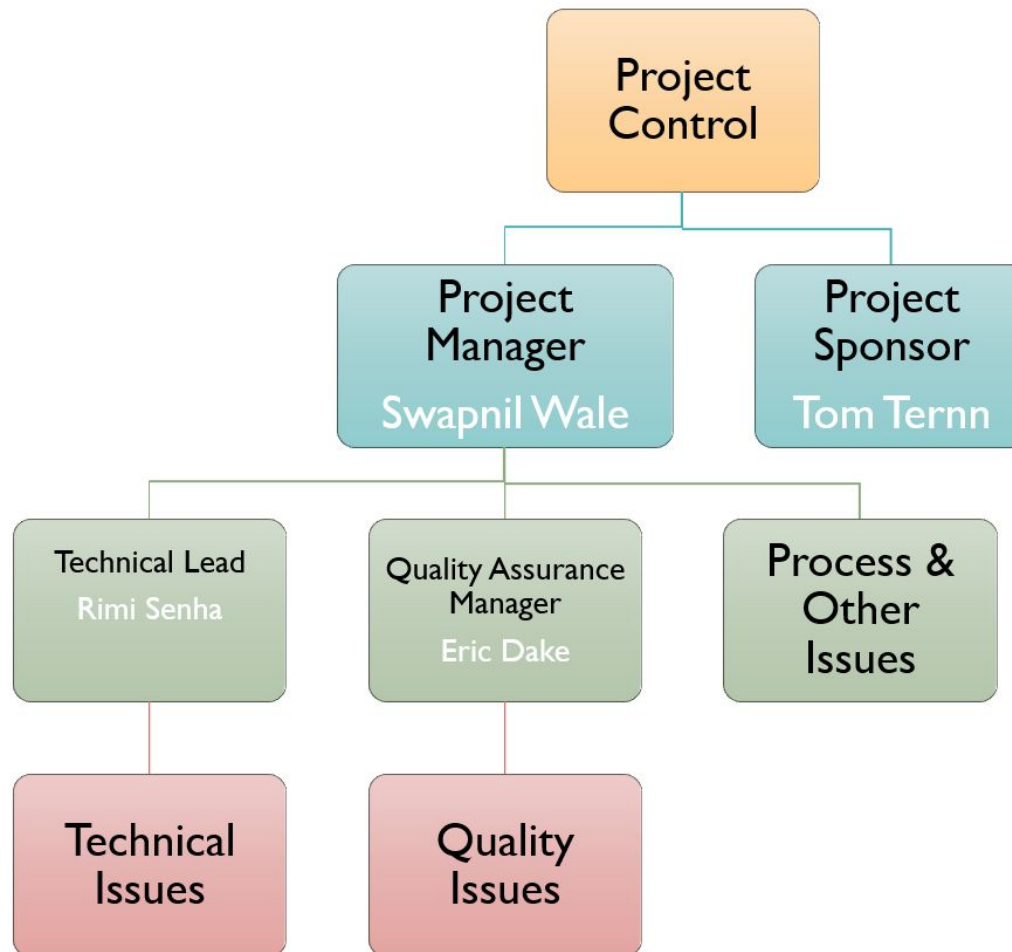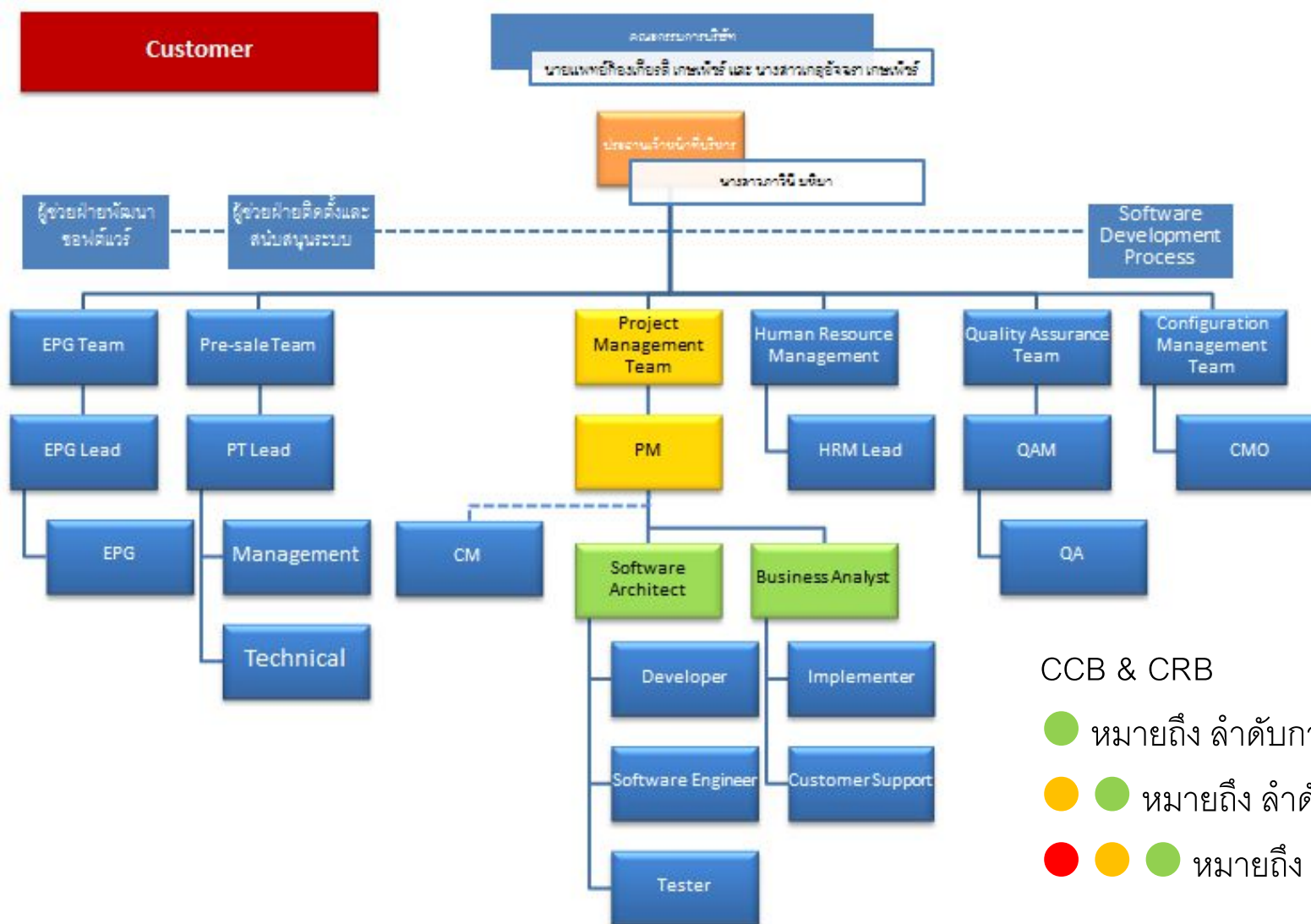
KEY PROJECT RISKS

No	Risk / Issue	Risk Category	Owner	Risk Rating	Possible Mitigation
1	The project team does not have any contingency so if any resources take unplanned leave or leaves the organisation then the project will suffer.	Human Resources	IT	High	• None at this stage.
2	The project needs the license to be procured ASAP for the system setup to start. Any delays with the procurement process will delay the project.	Project Schedule	Finance	Medium	• Follow up with finance department. • Work with vendor to see if the setup can be started with a trial license.
3	The IT Team does not have the skillset to maintain the BRMS Product.	Technical Risk	IT	Low	• Organise training sessions for IT Team. • Organise shadowing session with vendor consultants.

PROJECT ESCALATION PROCESS AND TECHNICAL CONTACTS

1. No matter how small or big the project there will always be issues and you always need someone to be accountable. The kick off meeting is a good opportunity to detail this.

2. **The escalation and technical contacts in the kickoff meeting template will explain how the team should communicate when there are issues.**

3. It also explains how the information about issues and escalation will be communicated all the way to the project control.

4. Typically the teams escalates issues to their respective team leaders which are then escalated further to the project manager. **The project manager in conjunction to the sponsor may decide to get the project control involved.**

TECHNICAL CONTACTS & ESCALATION PROCESS

Customer

คณะกรรมการบริษัท
นายแพทย์ก้องเกียรติ เกษเพ็ชร์ และ นางสาวกฤฒอัจฉรา เกษเพ็ชร์

ประธานร้านน้ำพื้นบริษาท
นางสาวภารินี บงขีมา

ผู้ช่วยฝ่ายพัฒนาซอฟต์แวร์

ผู้ช่วยฝ่ายติดตั้งและสนับสนุนระบบ

Software Development Process

EPG Team

Pre-sale Team

Project Management Team

Human Resource Management

Quality Assurance Team

Configuration Management Team

EPG Lead

PT Lead

PM

HRM Lead

QAM

CMO

EPG

Management

CM

Software Architect

Business Analyst

QA

Technical

Developer

Implementer

Software Engineer

Customer Support

Tester

CCB & CRB

🟢 หมายถึง ลำดับการตัดสินใจขั้นที่ 1, 2

🟡🟢 หมายถึง ลำดับการตัดสินใจขั้นที่ 3

🔴🟡🟢 หมายถึง ลำดับการตัดสินใจขั้นที่ 4

PROJECT CLOSURE TERMS AND DOCUMENTATION

1. The project closure terms are the conditions which need to be met for the project to be closed.

2. The closure terms need to be drafted carefully as they can be very political. Small grammatical errors can lead to lengthy delays in closing the project.

3. The project closure terms should be a bullet item list.

4. The project documentation should contain information about documents related to the project like Project Plan, Business Case, Risk Management plan etc.

PROJECT CLOSURE TERMS

- All the current business rules are migrated to the new BRMS.

- Business Users will be able to maintain business rules.

- Business Rules changes will not require IT Involvement.

- The current manual process for application risk assessment will be abolished.

PROJECT DOCUMENTATION

Document	Link
Project Plan	\<Document Link\>
Business Case	\<Document Link\>
Risk Management Plan	\<Document Link\>

ASSIGNMENT #2

- แบ่งกลุ่ม ๆ ละ 10 คน
- เขียนโครงการที่สนใจจะพัฒนาในรูปแบบ **Proposal (doc)**
- นำเสนอโครงการในรูปแบบของ **Kick-off meeting (ppt)**