# Project Planning (& Executing & Closing)

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University of Regina

FACULTY OF ENGINEERING & APPLIED SCIENCE
Software Systems Engineering

CC BY SA

# Outline

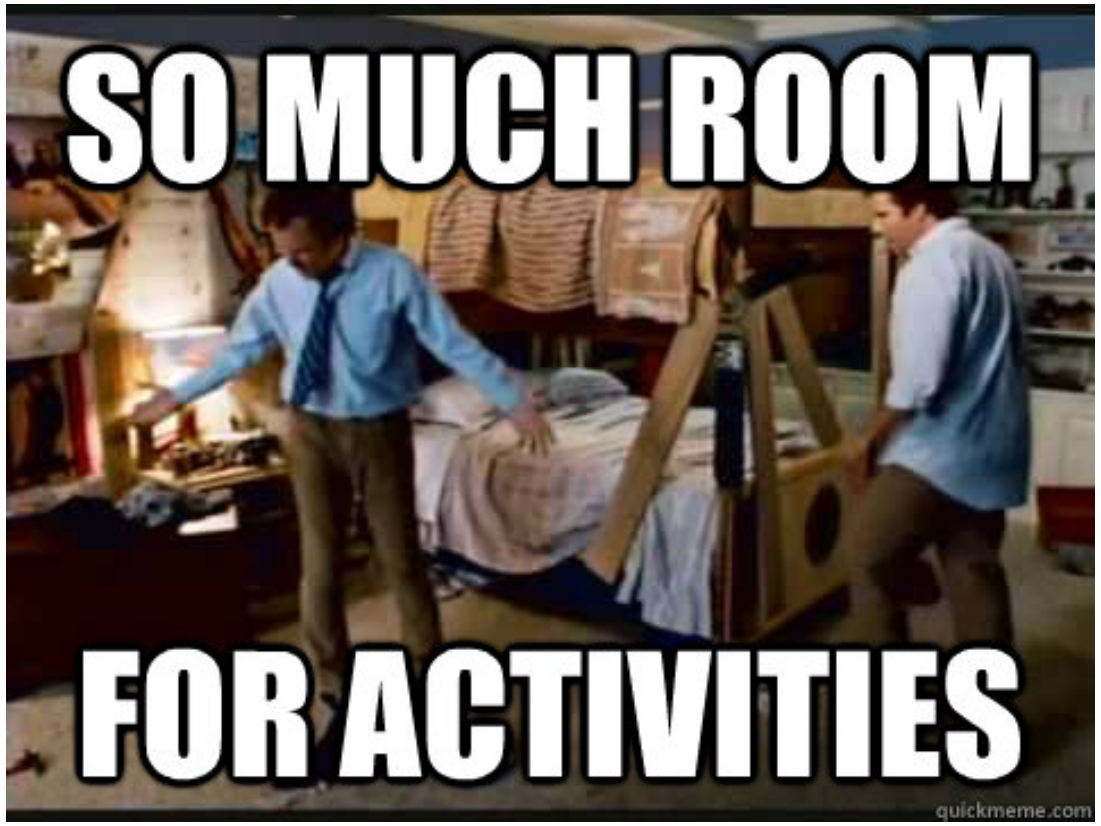
- Various project planning activities
- Executing the plan
- Various execution management
- Project reporting

# Stakeholder planning

- Why care?

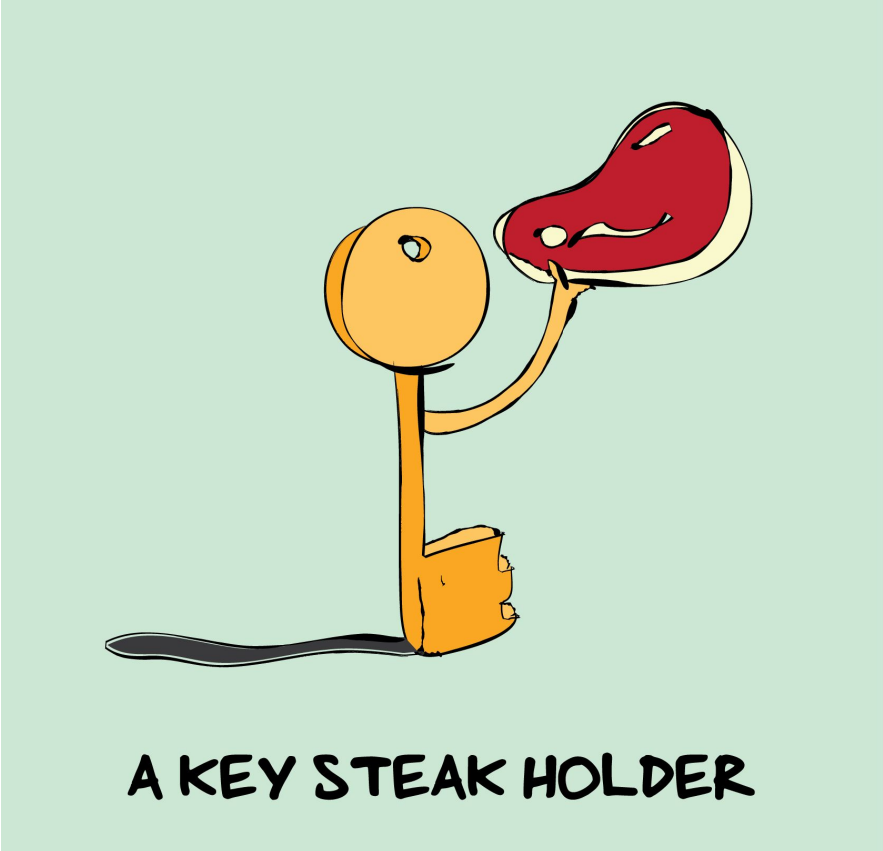
# Stakeholder planning

- Why care?
- Main activities



# Stakeholder planning

- Why care?
- Main activities
- Stakeholder characteristics
  - Level of power
  - Level of interest
  - Level of support



# Stakeholder planning

- Why care?
- Main activities
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  - Level of power
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  - Level of support
- Stakeholder analysis

**Stakeholder Analysis Template**

| STAKEHOLDER ANALYSIS | | | | |
|---|---|---|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | | | |
| **Name** | **Project Role** | **Power** | **Interest** | **Level of Support** |
| [Name of the person or group.] | [Project role/title or the reason that they are a stakeholder.] | [High/ Low] | [High/ Low] | [Supportive/ Neutral/ Unsupportive] |

# Stakeholder planning

- Why care?
- Main activities
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  - Level of interest
  - Level of support
- Stakeholder analysis
- Stakeholder management plan

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## Stakeholder Management Plan Template

| STAKEHOLDER MANAGEMENT PLAN | | |
|---|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | |
| **Name** | **About the Stakeholder** | **Plan** |
| [Name of the person or group.] | [Background and characteristics of the stakeholder.] | [Details the approach to be taken to build an effective relationship with the stakeholder.] |

# Stakeholder planning

- Why care?
- Main activities
- Stakeholder characteristics
  - Level of power
  - Level of interest
  - Level of support
- Stakeholder a
- Stakeholde plan
- NOTE!

## Stakeholder Analysis Template

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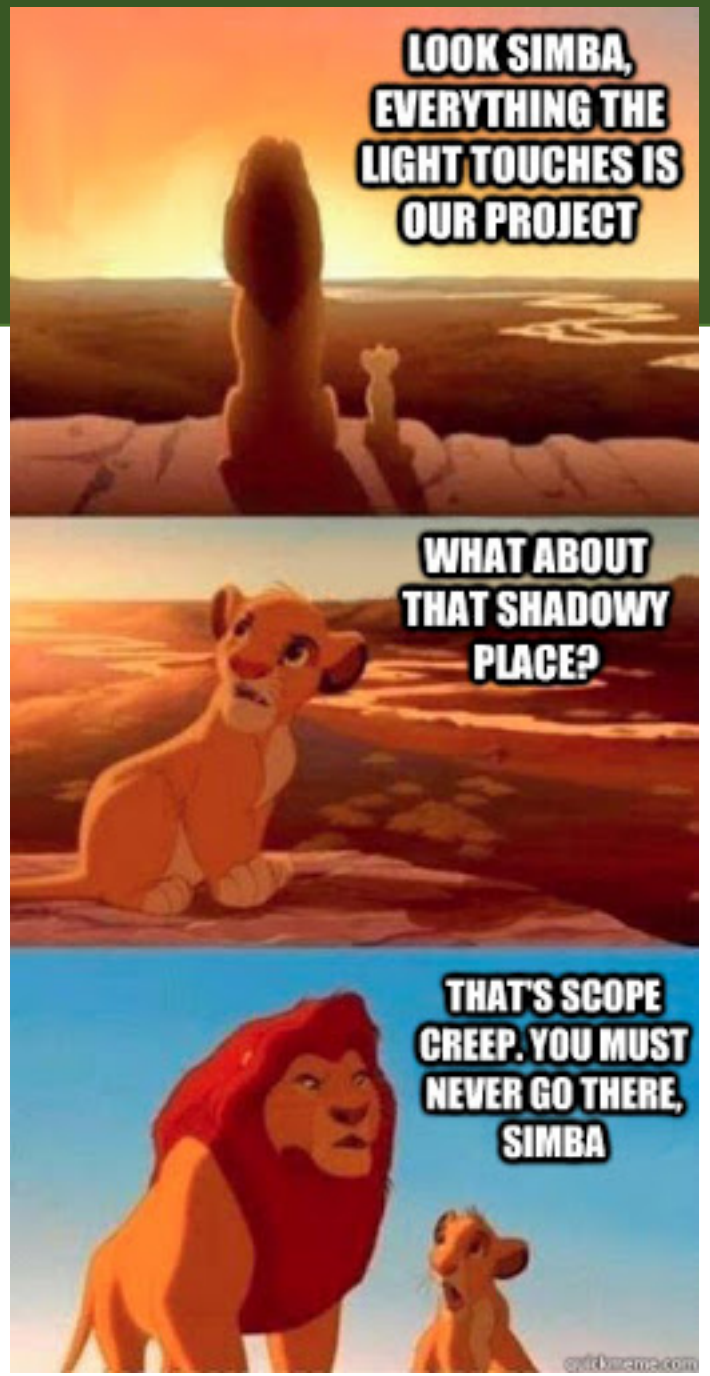
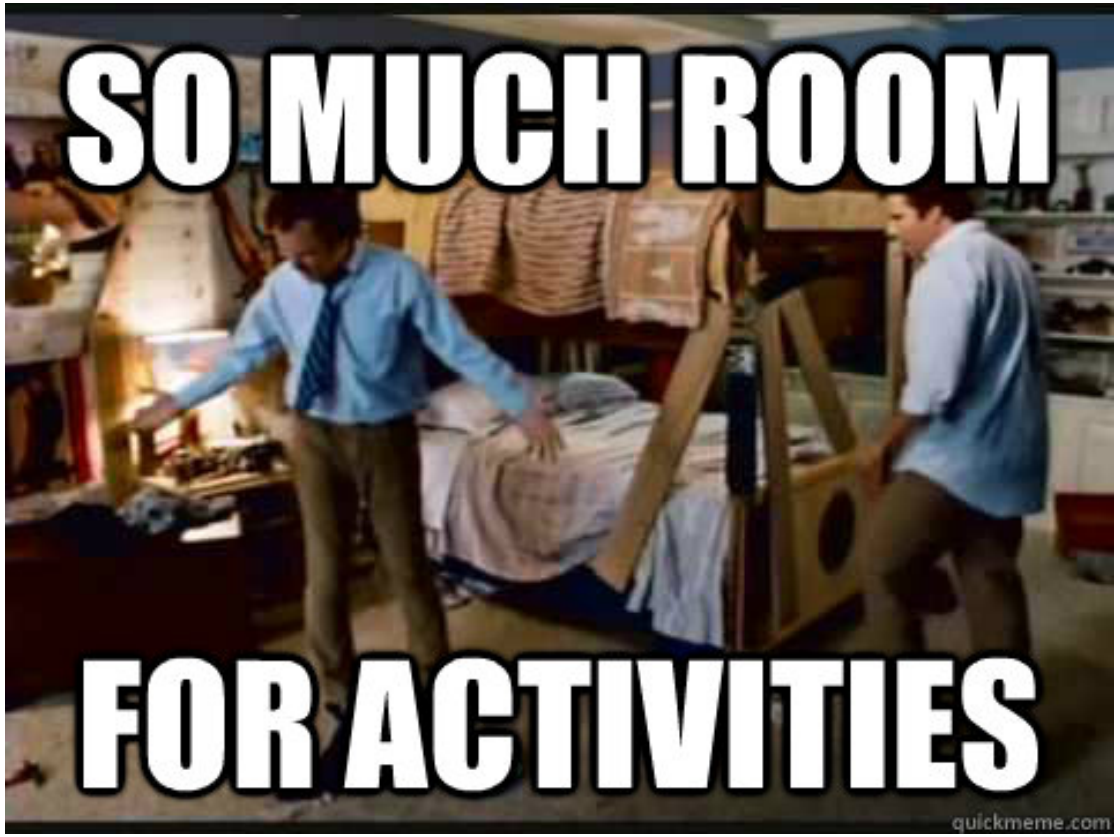
# Scope planning

- Scope?



# Scope planning

- Scope?
- Main activities



# Scope planning

- Scope?
- Main activities
- Project requirements

**Project Requirements Template**

| PROJECT REQUIREMENTS | |
|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] |
| **Functional Requirements** | |
| [This section should list the functional requirements for the project including any features or properties of the project's outcomes.] | |
| **Technical/Performance Requirements** | |
| [This section should list the technical requirements for the project (e.g., the required technology infrastructure) and any performance requirements (e.g., the minimum response time).] | |

## Project Requirements Template

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| [This section should list the technical requirements for the project ( structure) and any performance requirements (e.g., the minimum re | |

- Work breakdown & project scope statement

## Project Scope Statement Template

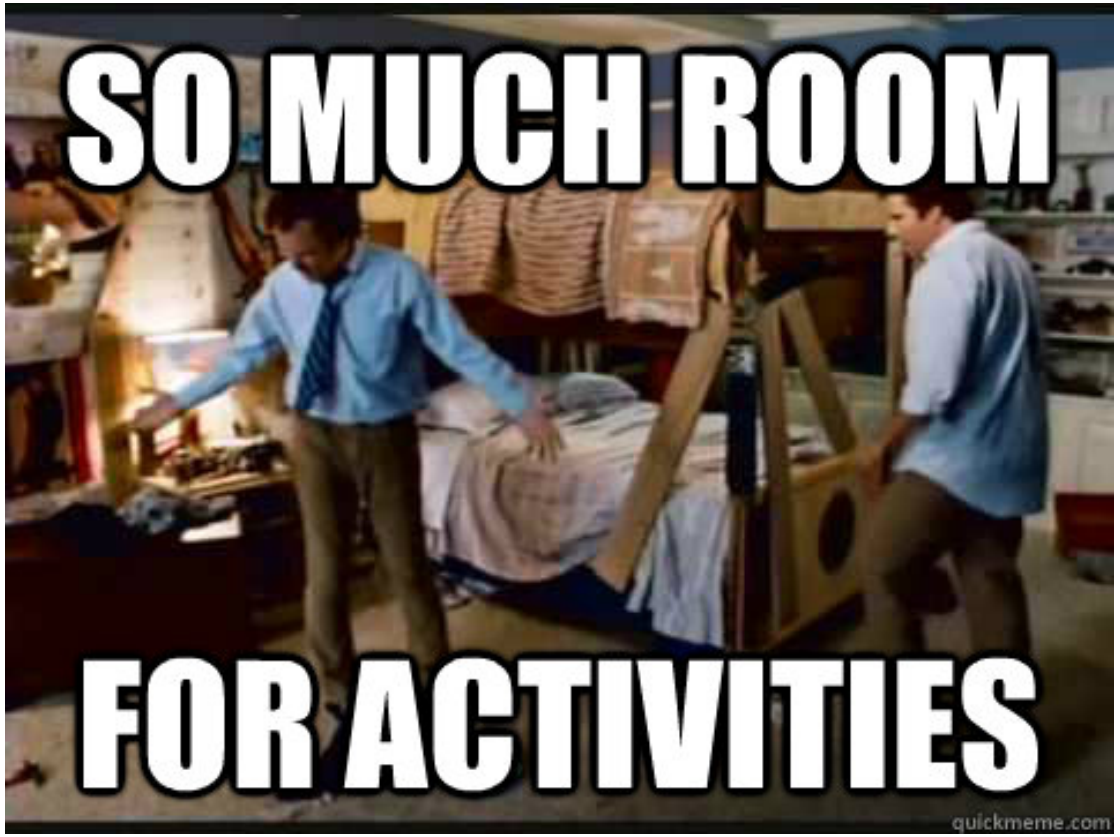
| PROJECT SCOPE STATEMENT | |
|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] |
| **Project Deliverables** | |
| [High-level deliverable from the WBS is listed here.] | [Work package listed here.]<br>[Describe this work package in as much detail as possible.]<br><br>[Work package listed here.]<br>[Describe this work package in as much detail as possible.] |
| [High-level deliverable from the WBS is listed here.] | [Work package listed here.]<br>[Describe this work package in as much detail as possible.]<br><br>[Work package listed here.]<br>[Describe this work package in as much detail as possible.] |
| **Project Exclusions** | |
| [Indicate anything that will not be included in the scope of the project.] | |

# Schedule planning

- Why draft a schedule?

# Schedule planning

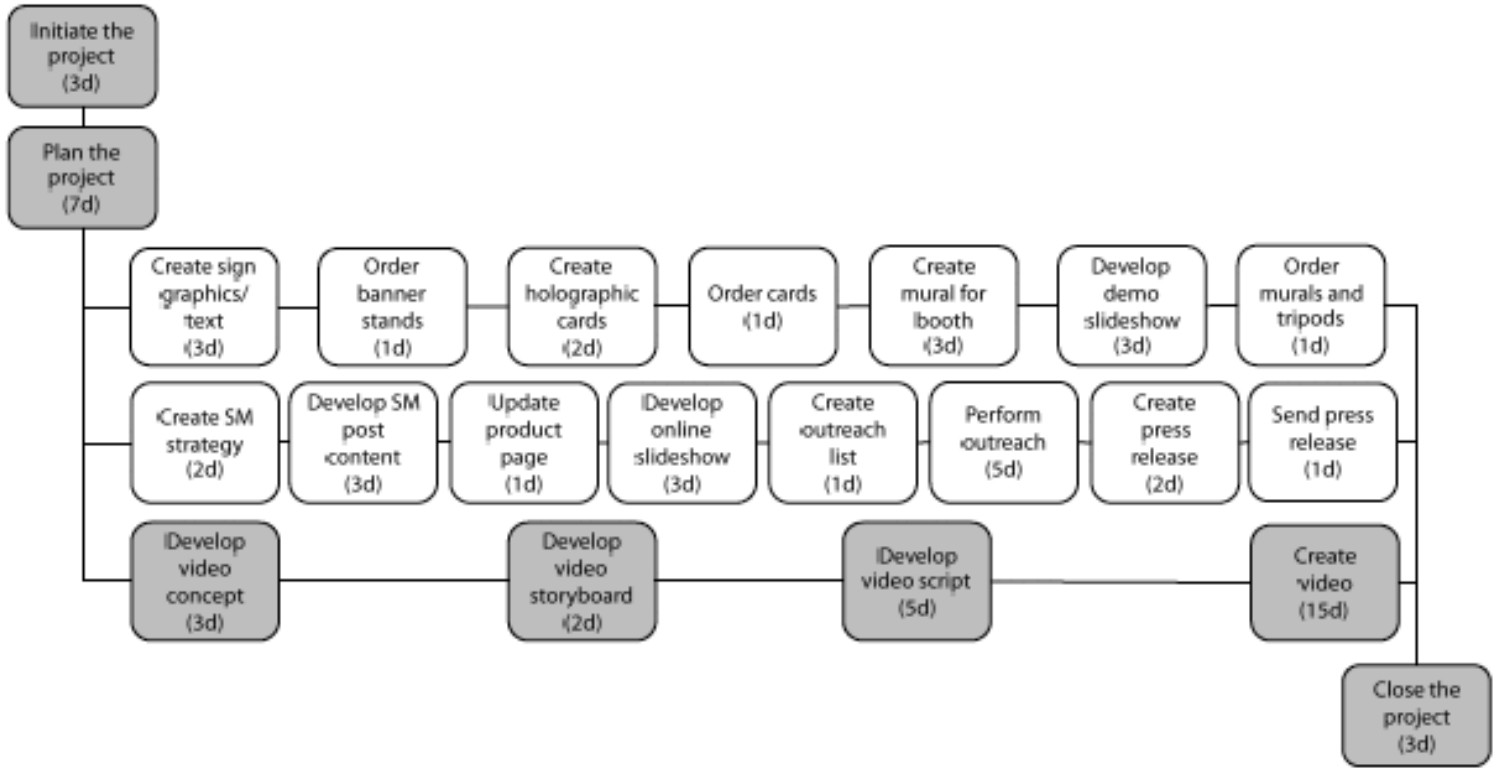
- Why draft a schedule?
- Main activities



# Schedule planning

- Why draft a schedule?
- Main activities

**Network Diagram with Critical Path Displayed**



# Schedule planning

- Why draft a schedule?
- Main activities
- Types of schedules
  - Milestone-based
  - Activity-based
  - Dependency-based

**Milestone-Based Schedule**

| MILESTONE | DATE |
|---|---|
| Project approved | March 25, 2020 |
| Trade show materials complete | April 23, 2020 |
| Communications complete | April 29, 2020 |
| Promotional video complete | May 8, 2020 |
| Project complete | May 13, 2020 |

# Schedule planning

- Why draft a schedule?
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**Activity-Based Schedule**

| ACTIVITY | DURATION | START DATE | END DATE |
|---|---|---|---|
| **Initiating** | | | |
| Initiate the project | 3 days | March 23, 2020 | March 25, 2020 |
| Project approved | 0 days | March 25, 2020 | March 25, 2020 |
| **Planning** | | | |
| Plan the project | 7 days | March 26, 2020 | April 3, 2020 |
| **Executing** | | | |
| **Trade Show Signage** | | | |
| Create sign graphics/text | 3 days | April 6, 2020 | April 8, 2020 |
| Order banner stands | 1 day | April 9, 2020 | April 9, 2020 |

# Schedule planning

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  - Activity-based
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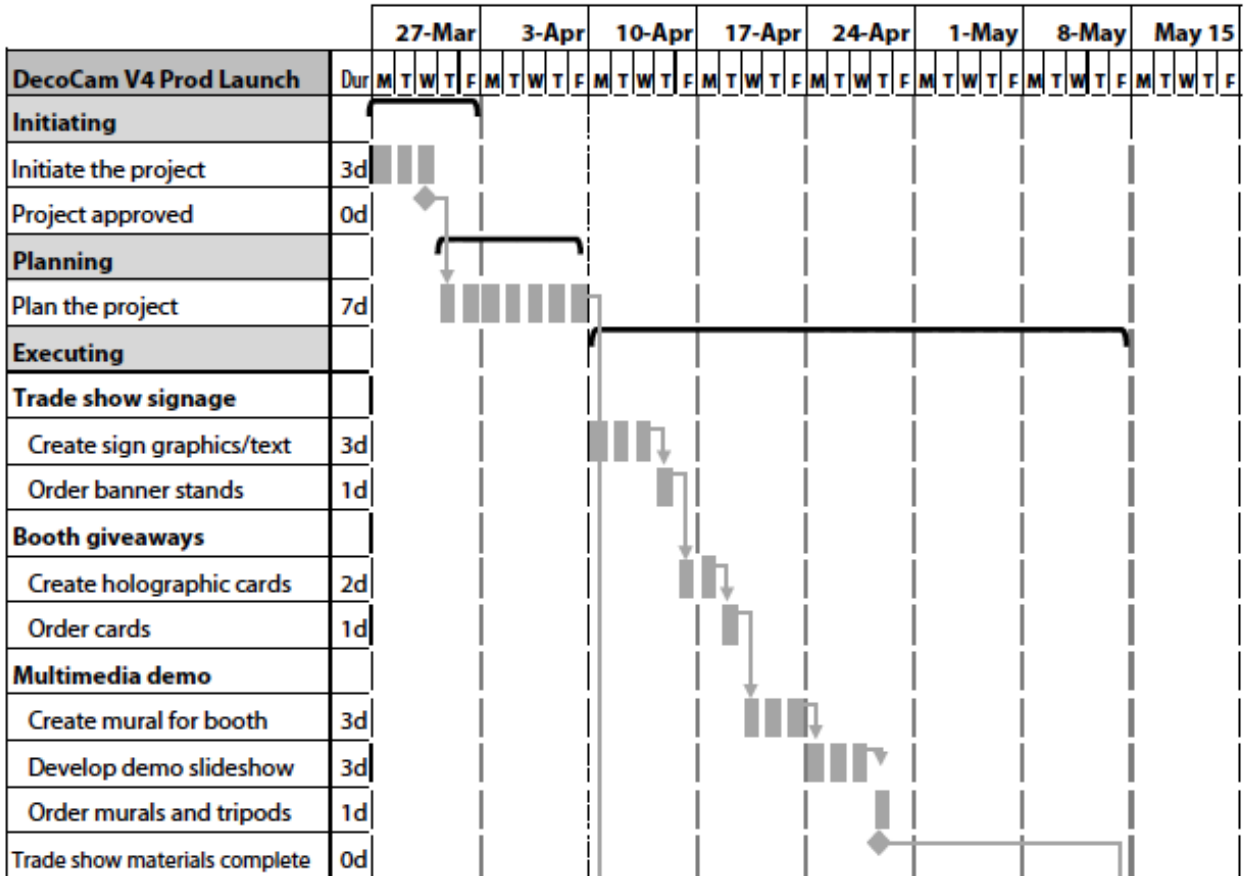
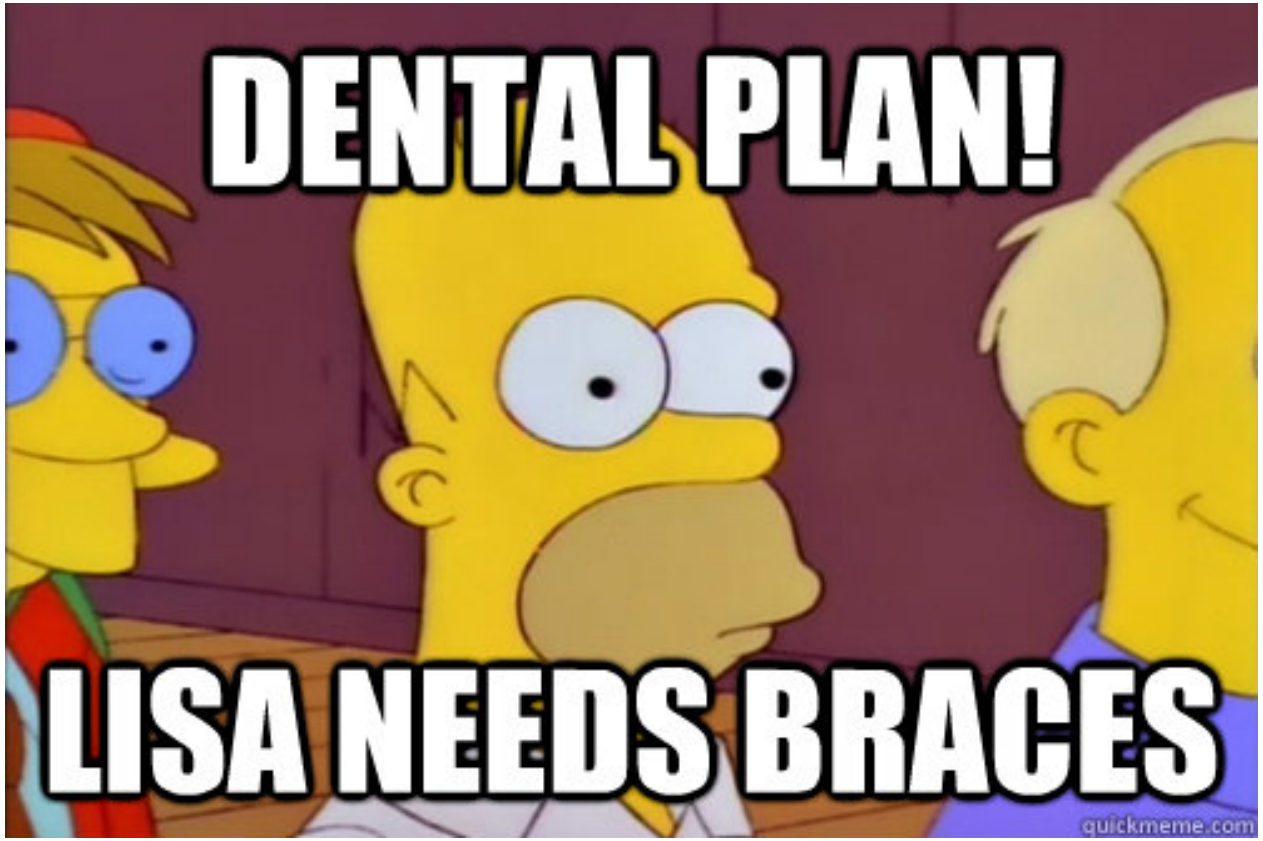
Dependency-Based Schedule (Gantt Chart)



# Budget planning

- Things cost, good to (try to) manage ☺



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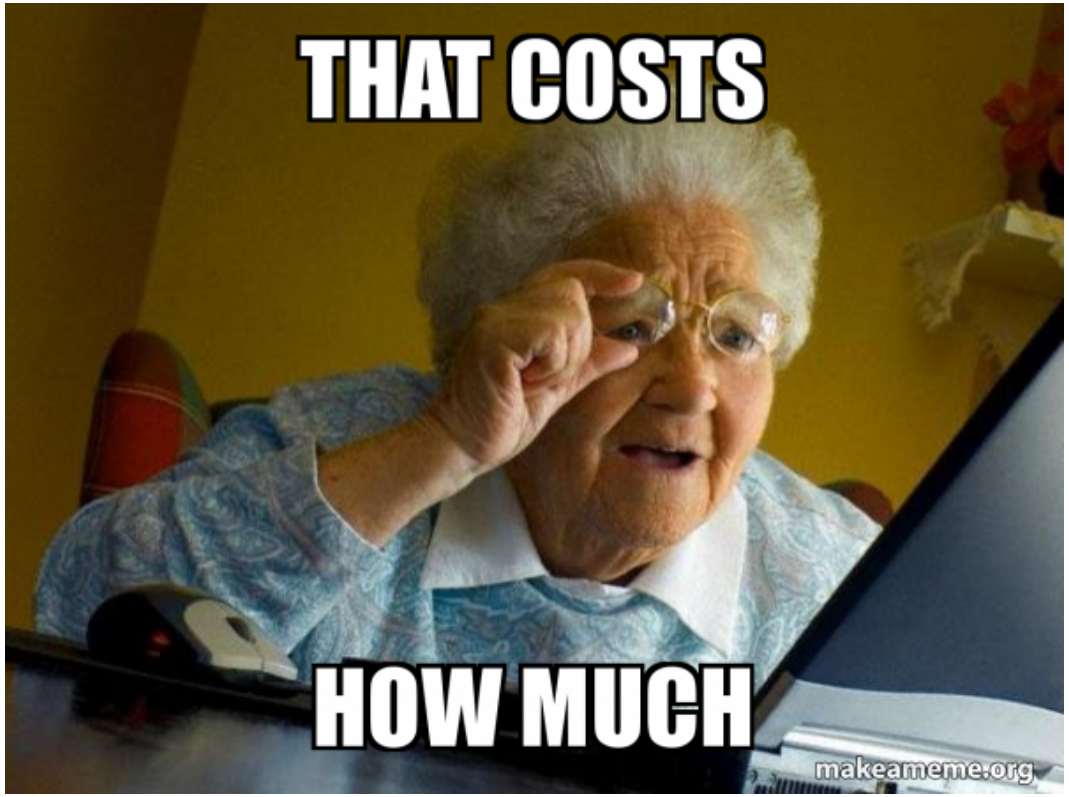

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- Main activities
- Cost estimates
  - Analogous
  - Parametric
  - Bottom-up

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- Things cost, good to (try manage ☺
- Main activities
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  - Bottom-up

Cost Estimates

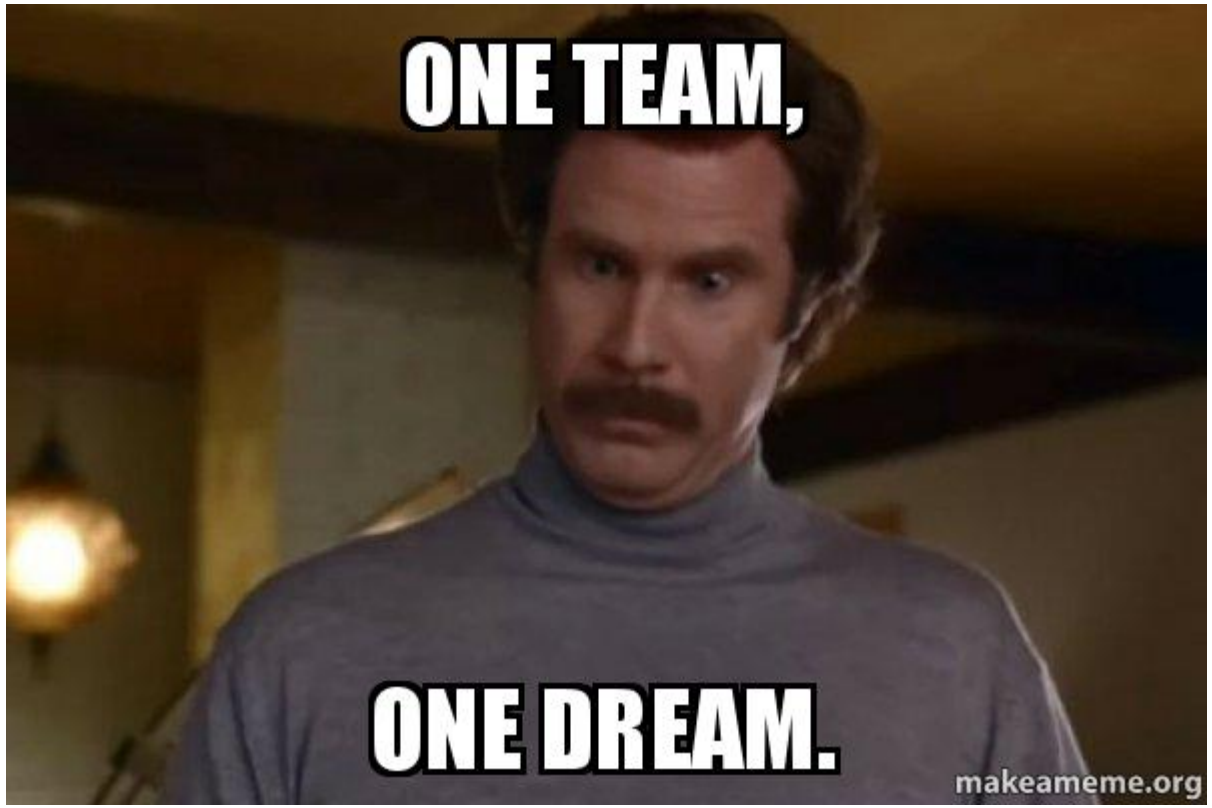
| HUMAN RESOURCES COST ESTIMATES | | | | | |
|---|---|---|---|---|---|
| **Activity** | **Duration (days)** | **Resource** | **% Allo-cated** | **Daily Rate** | **Cost** |
| **Initiating Phase** | | | | | |
| Initiate the project | 3 | Project Manager | 50% | $800.00 | $1,200.00 |
| **Total Initiating Phase** | | | | | **$1,200.00** |
| **Planning Phase** | | | | | |
| Plan the project | 7 | Project Manager | 50% | $800.00 | $2,800.00 |
| | 7 | Business Analyst | 100% | $640.00 | $4,480.00 |
| **Total Planning Phase** | | | | | **$7,280.00** |
| **Executing Phase** | | | | | |
| Create sign graphics/ text | 3 | Graphic Designer | 100% | $400.00 | $1,200.00 |
| Order banner stands | 1 | Graphic Designer | 100% | $400.00 | $400.00 |

# Budget planning

| DETAILED BUDGET | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | | | | | | | | | | | | |
| **Cost Category** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **[Period Ending Date]** | **Total** |
| **Initiating** | | | | | | | | | | | | | |
| HR costs | | | | | | | | | | | | | $ - |
| Other costs | | | | | | | | | | | | | $ - |
| **Planning** | | | | | | | | | | | | | |
| HR costs | | | | | | | | | | | | | $ - |
| Other costs | | | | | | | | | | | | | $ - |
| **Executing** | | | | | | | | | | | | | |
| HR costs | | | | | | | | | | | | | $ - |
| Other costs | | | | | | | | | | | | | $ - |
| **Closing** | | | | | | | | | | | | | |
| HR costs | | | | | | | | | | | | | $ - |
| Other costs | | | | | | | | | | | | | $ - |
| **Total Costs** | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |

# Project team planning

- Project thinking



# Project team planning

- Project thinking
- Main activities

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- Project thinking
- Main activities

Project HR Requirements

| PROJECT HR REQUIREMENTS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Project Name | DCV4Launch–DecoCam V4 Product Launch | | | | | | | |
| Resource Type | Week ending 27-Mar | Week ending 3-Apr | Week ending 10-Apr | Week ending 17-Apr | Week ending 24-Apr | Week ending 1-May | Week ending 8-May | Week ending 15-May |
| Project Manager | 2.5 days | 2.5 days | 1.7 days | 1.7 days | 1.7 days | 1.7 days | 1.7 days | 1.5 days |
| Business Analyst | 2 days | 5 days | 1 day | 1 day | 1 day | 1 day | 1 day | |
| Graphic Designer | | | 5 days | 5 days | 4 days | | | |
| Commu-nications Specialist | | | 5 days | 5 days | 5 days | 3 days | | |
| Marketing Specialist | | | 5 days | 5 days | 5 days | 5 days | 5 days | |
| Videographer | | | 5 days | 5 days | 5 days | 5 days | 5 days | |

# Project team planning

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- Main activities

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|---|---|---|---|---|---|---|---|---|
| Project Name | DCV4Launch–DecoCam V4 Product Launch | | | | | | | |
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| Project Manager | | | | | | | | |
| Business Analyst | | | | | | | | |
| Graphic Designer | | | | | | | | |
| Commu-nications Specialist | | | | | | | | |
| Marketing Specialist | | | | | | | | |
| Videograph | | | | | | | | |

Project Roles and Responsibilities Template

| PROJECT ROLES AND RESPONSIBILITIES | | |
|---|---|---|
| Project Name | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | |
| Name | Role | Responsibilities |
| [Team member name.] | [Their role or job title.] | [Detailed description of their project responsibilities and job duties.] |

# Project team planning

- Project thinking
- Main activities

Project HR P

| | |
|---|---|
| Project Nam | |
| Resource Type | |
| Project Manager | |
| Business Analyst | |
| Graphic Designer | |
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## Project Roles and Responsibilities Template

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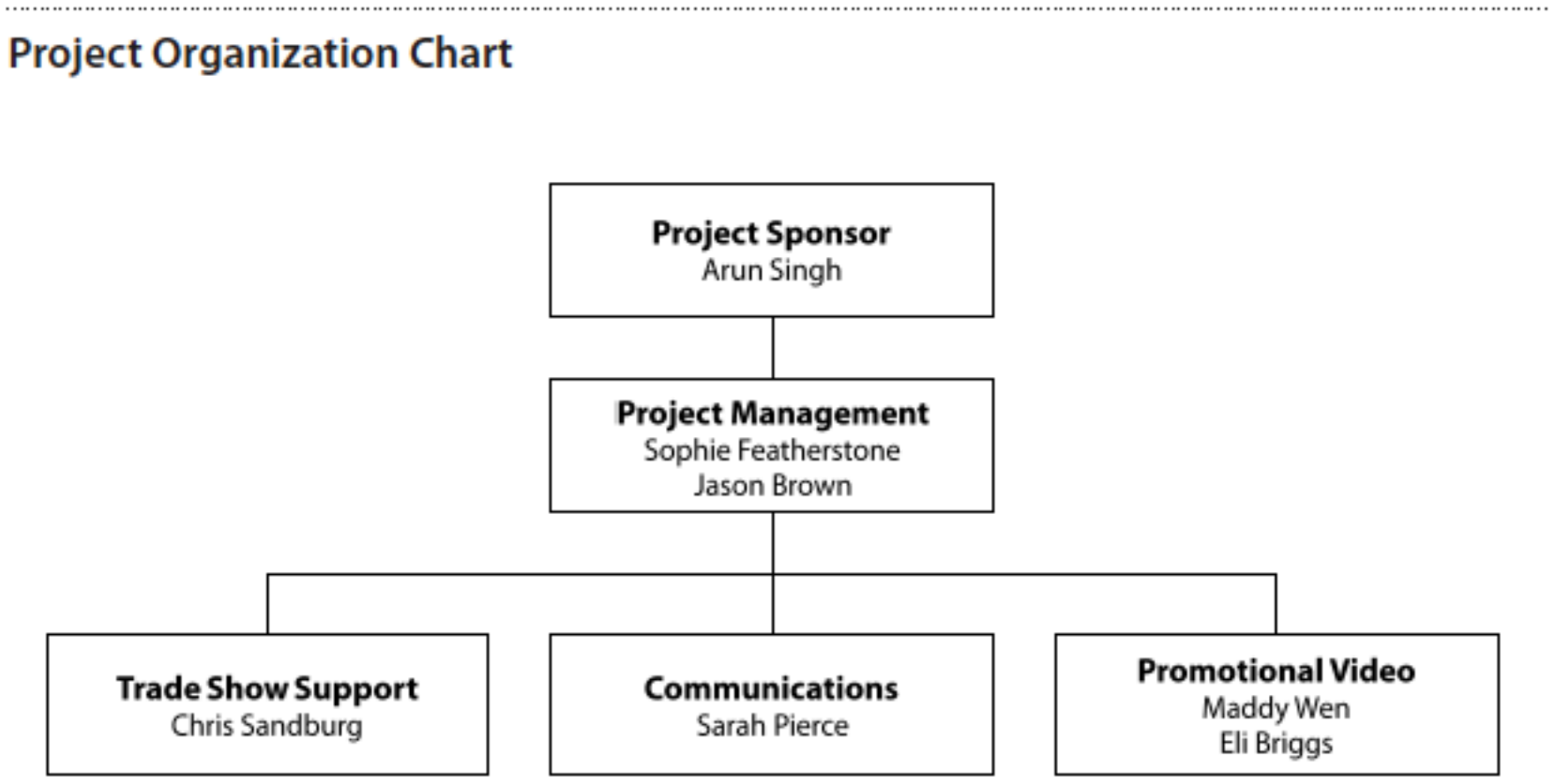
| **Name** | **Role** | **Responsibilities** |
| [Team member name.] | [Their role or job title.] | [Detailed description of their project responsibilities and job duties.] |

## RACI Chart Template

| RACI CHART | | | | | | | |
|---|---|---|---|---|---|---|---|
| | [Name] | [Name] | [Name] | [Name] | [Name] | [Name] | [Name] |
| [Project work package or activity.] | R/A/C/I | R/A/C/I | R/A/C/I | R/A/C/I | R/A/C/I | R/A/C/I | R/A/C/I |
| **R–Responsible A–Accountable C–Consulted I–Informed** | | | | | | | |

# Project team planning

- Project thinking
- Main activities



# Quality planning

- Quality & scope

# Quality planning

- Quality & scope
- Main activities
  - Quality planning
  - Quality assurance
  - Quality control

Quality Management Plan Template

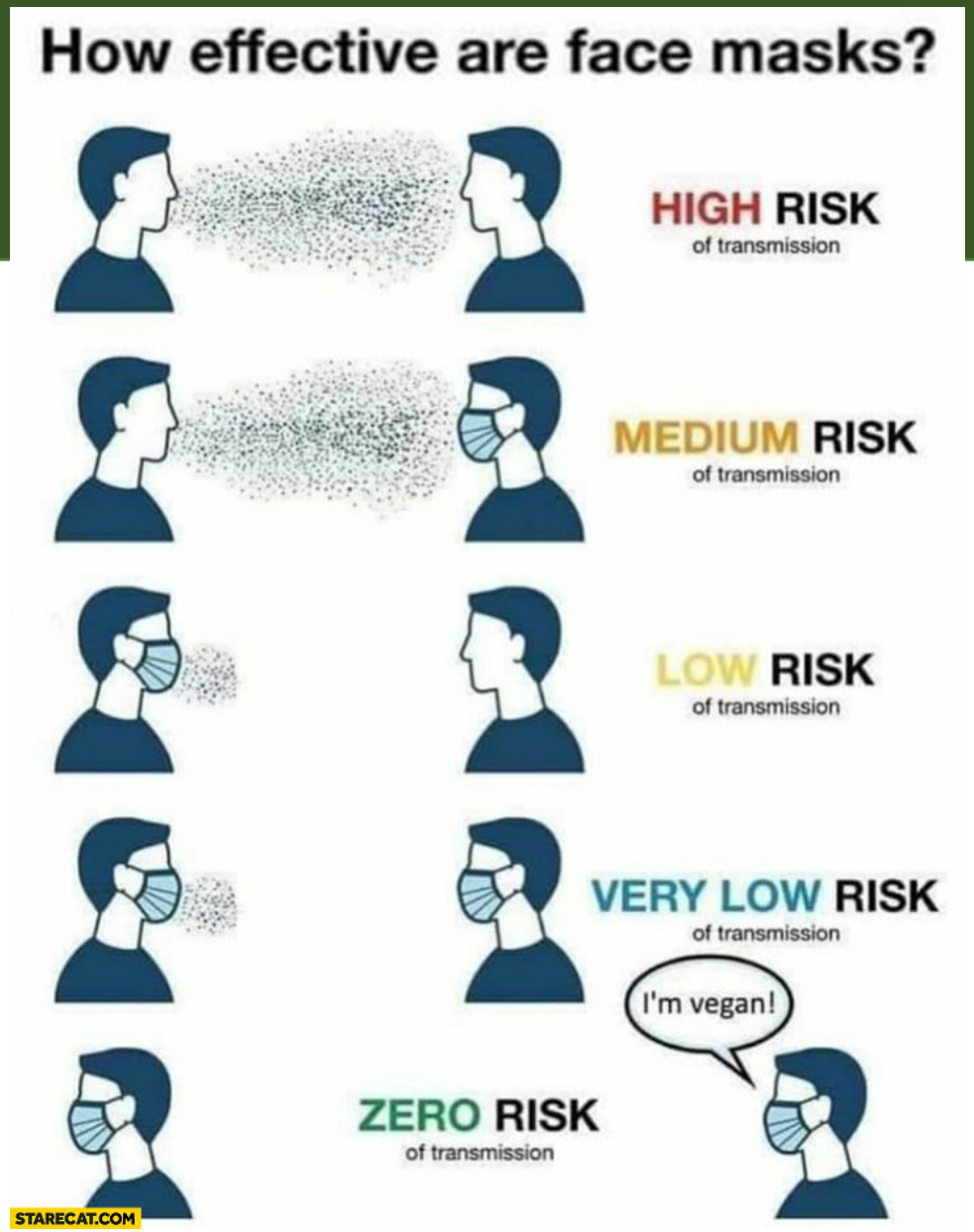
| QUALITY MANAGEMENT PLAN | |
|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] |
| **Quality Standards** | |
| **[Category Standards]**<br>1. [Standard #1]<br>2. [Standard #2]<br>3. [Standard #3] | |
| **[Category Standards]**<br>1. [Standard #4]<br>2. [Standard #5]<br>3. [Standard #6] | |

# Risk planning

- Often overlooked

# Risk planning

- Often overlooked
- Main activities
  - Risk list
  - Risk response plan



# Risk planning

- Often overlooked
- Main activities
  - Risk list
  - Risk response plan

## Probability Table

| PROBABILITY | PROBABILITY FACTOR | DESCRIPTION |
|---|---|---|
| Very Likely | .8 | Occurs frequently during projects. Conditions are present for its occurrence during the project. |
| Likely | .5 | Occurs sometimes during projects. Some conditions are present for its occurrence during the project. |
| Unlikely | .2 | Does not generally occur during projects. Conditions are not present for its occurrence during the project. |

# Risk planning

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## Probability Table

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## Impact Table

| IMPACT | IMPACT FACTOR | DESCRIPTION |
|---|---|---|
| Critical | 10 | The occurrence of the risk would be catastrophic for the project with significant impact to the organization's finances, performance, or reputation. |
| Severe | 8 | The occurrence of the risk would be severe for the project with a high impact to the organization's finances, performance, or reputation. |
| Moderate | 5 | The occurrence of the risk would be a moderate issue for the project but is unlikely to significantly impact the organization's finances, performance, or reputation. |
| Low | 2 | The occurrence of the risk would be negligible for the project and would not impact the organization's finances, performance, or reputation. |

# Risk planning

- Often overlooked
- Main activities
  - Risk list
  - Risk response plan

**Risk List Template**

| RISK LIST | | | | | |
|---|---|---|---|---|---|
| **Project Name** | | | | | |
| [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | | | | | |
| **#** | **Risk** | **Description** | **Prob Factor** | **Impact Factor** | **Risk Score** |
| [1, 2, etc.] | [Name of the risk.] | [Full description of the risk.] | Very likely (.8)<br>Likely (.5)<br>Unlikely (.2) | Critical (10)<br>High (8)<br>Med (5)<br>Low (2) | [Prob factor multiplied by impact factor.] |

# Risk planning

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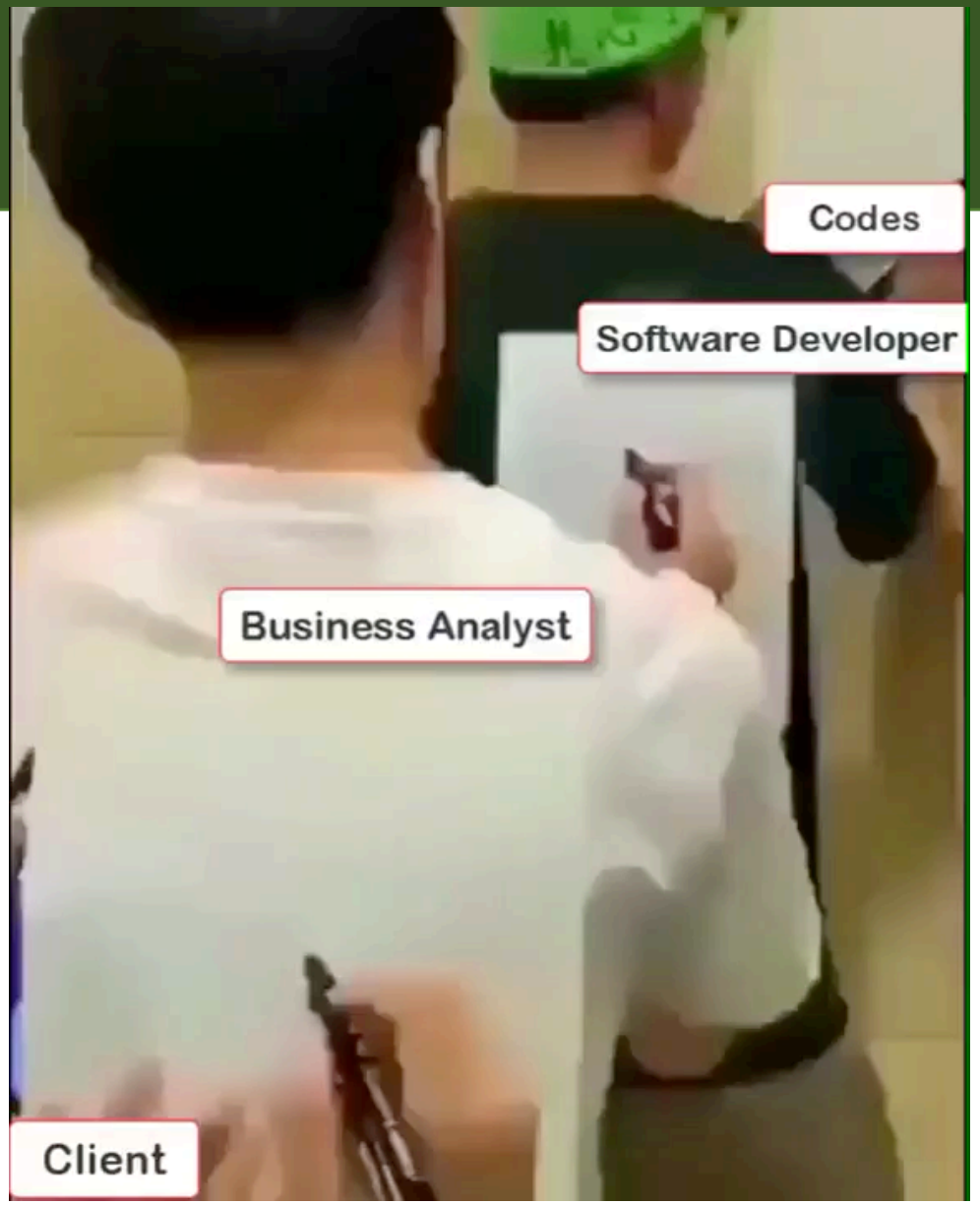
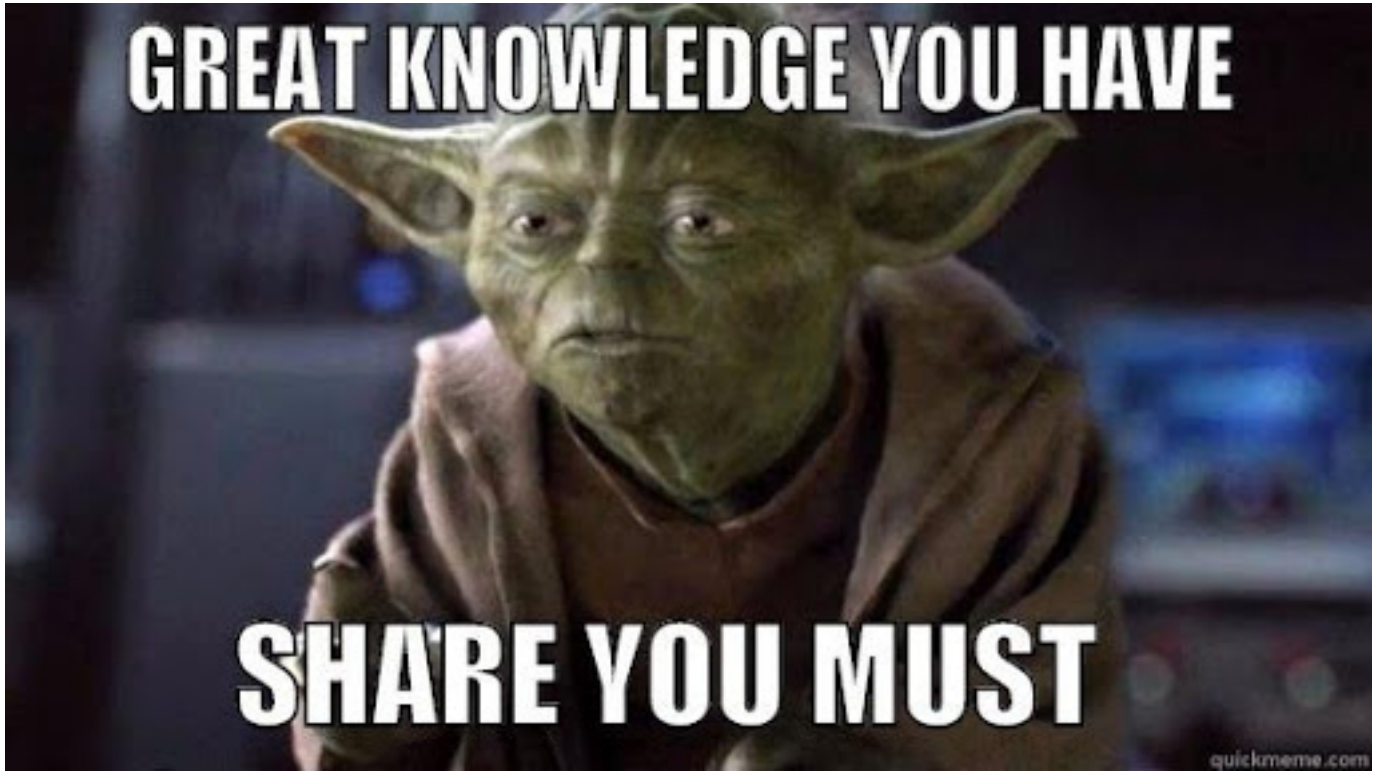
# Communications planning

- It’s a social effort!



# Communications planning

- It’s a social effort!
- Main activities
  - Project documentation guidelines
  - Communications management plan



# Communications planning

- It's a social effort!
- Main activities
  - Project documentation guidelines
  - Communications management plan

Project Documentation Guidelines Template

| PROJECT DOCUMENTATION GUIDELINES | |
|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] |
| **Storage Location and Organization** | |
| [This section describes the location of project documents and how they are organized.] | |
| **Naming Conventions** | |
| [This section describes the naming conventions for all project files.] | |
| **Document Versions** | |
| [This section indicates which documents require multiple versions.] | |

# Communications planning

- It's a social effort!
- Main activities
  - Project documentation guidelines
  - Communications management plan

**Communication Management Plan Template**

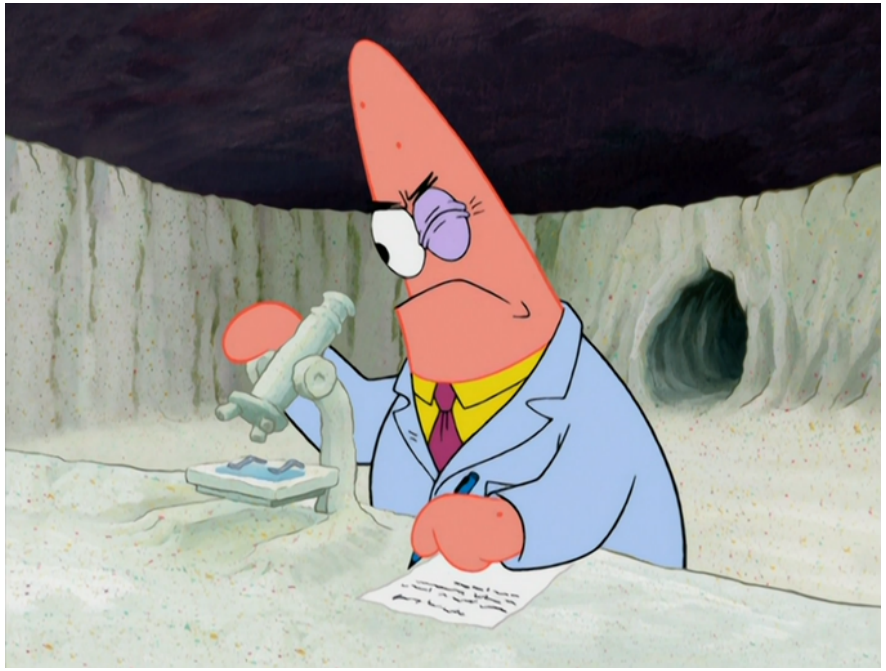
| COMMUNICATION MANAGEMENT PLAN | | | |
|---|---|---|---|
| **Project Name** | [This section contains the project name that should appear consistently on all project documents. Organizations often have project naming conventions.] | | |
| **Communication Name** | **Description** | **Audience** | **Timing** |
| [Short name of the communication.] | [Full description of the communication including the purpose and the communication medium to be used.] | [People or group to receive or attend to the communication.] | [Date or frequency of the communication.] |

# Project execution & closing & final thoughts

- Beyond the scope of lectures
  - You likely won't have time in this class to fully explore, but capstone is another story!

# Project execution & closing & final thoughts

- Beyond the scope of lectures
  - You likely won't have time in this class to fully explore, but capstone is another story!
- Revert to your scientist state of being
  - How Not to Raise Your Children
    - Or: How to Raise Smarter Children



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- Beyond the scope of lectures
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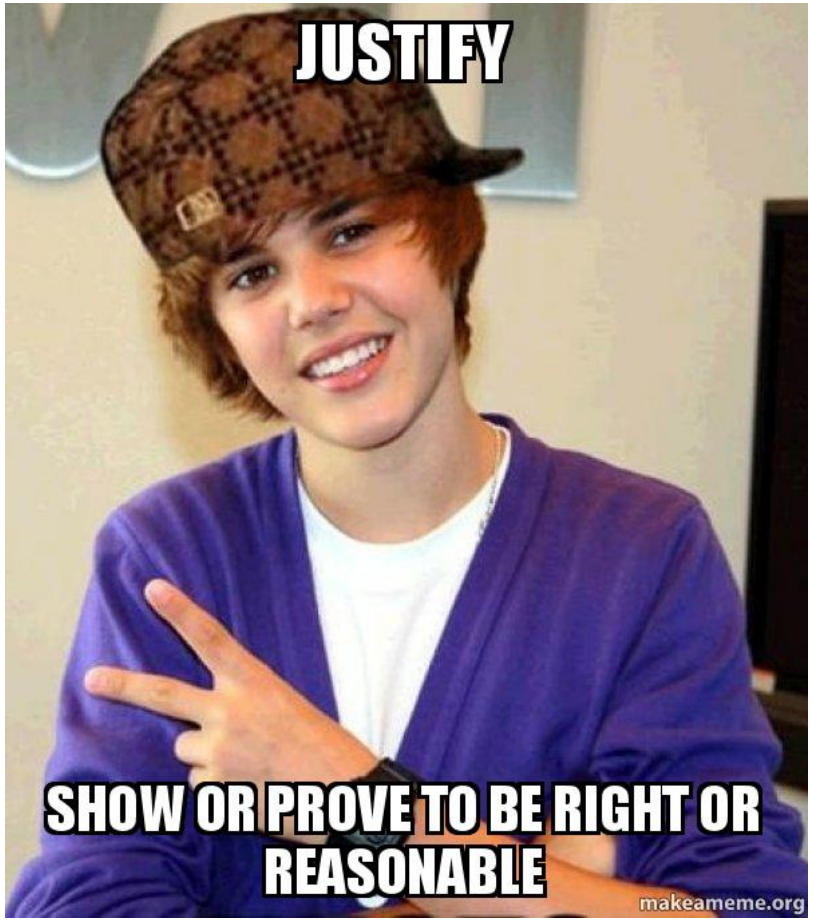
- Revert to your scientist state of being
  - How Not to Raise Your Children
    - Or: How to Raise Smarter Children
- Tinker away but your justification is a must say #rhymes



# Image refs

- Care, https://memegenerator.net/img/instances/59668118/tell-me-again-why-should-i-care-.jpg
- Activities, http://www.quickmeme.com/meme/3olqub
- Stakeholder, https://i.pinimg.com/originals/64/52/e8/6452e888f74720bb86c3563b7cc95d70.jpg
- Scope, http://www.quickmeme.com/meme/36k3rh
- Todo, https://i.kym-cdn.com/photos/images/facebook/000/580/455/009.png
- Budget, http://www.quickmeme.com/meme/3qttdy
- Costs, https://media.makeameme.org/created/that-costs-how.jpg
- Project thinking, https://www.prince2courselondon.com/wp-content/uploads/2016/10/Small-Project-Team-Challenges.jpg
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