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| GENUS INNOVATION LIMITED |
| Project Planning Procedure |
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| **Genus** |

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| Project Planning is the most vital phase in the Project Life-cycle. This is the formal transfer of customer requirements into “a project”. A Project Manager is identified and inducted to take complete charge of the Project. |

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# Overview

Project Planning is the most vital phase in the Project Life-cycle. This is the formal transfer of customer requirements into “a project”. A Project Manager is identified and inducted to take complete charge of the Project.

The plan is a dynamic document, which must be regularly updated to reflect the future course of action in the project based on various external and internal factors that might affect it.

# Objective

To make comprehensive Plan of the Project that shall be the basis for Project Monitoring.

# Scope

This process applies to all development Projects.

# Inputs

* Functional Specifications
* Issue Log
* Existing Project Plan

# Entry Criteria/Triggers

* Project Start
* Development order
* Schedule, effort or resource risk materialization based on Project Monitoring and Control
* Significant deviation from Approved Plan
* Approved Change Request
* Identified Major Action Items
* Identification of factors that may affect the project’s process or execution
* Changes to resource allocation
* The practitioners have undergone QMS trainings with focus on performing their processes.

# Tasks

| Sr.No | Task | Owner/Role |
| --- | --- | --- |
|  | **Initiate the Project** |  |
|  | Receive Inputs from customer, requirements, Specifications or any other customer defined format. | Design Head |
|  | Appoint a Project Manager for the project and share all corresponding inputs, requirements, specifications or any other customer defined format. | Design Head |
|  | Perform preliminary planning for the project using “Project Plan” (TMPL\_PRJPLN). The preliminary plan contains the responsibility of Functional Head & Project Manager, and the time and effort required to arrive at the inputs to detailed planning i.e. the completion of the Requirements development phase. The Project schedule (MPP) is initiated at this point with details of activities leading up to the detailed planning phase.  Verify the Customer Inputs for adequacy and liaison with the customer. | Project Manager |
|  | Send the customer inputs to the Functional head. The Functional head will be responsible for understanding, managing, developing, analyzing, and validating the requirements. Refer “Requirements Development and Management Procedure” (PRCD\_REQDEV). | Project Manager |
|  | Initiate a Kick-off Meeting with all the stakeholders who shall be involved in the project.   * These may include, but are not limited to Customer, Developers, Testers, Validation Team, Training Coordinator, and Configuration Administrator. * This meeting should typically include agenda related to Customer’s requirements capture, action item for requirement elicitation.   Record the Minutes of Meeting using “Minutes of Meeting” (TMPL\_MINMET). | Project Manager, Functional Head |
|  | Communicate the “Minutes of Meeting” (TMPL\_MINMET) to all stakeholders and seek their consensus. | Project Manager/ Functional Head |
|  | Create Project Configuration Library Structure. Refer Creation and Maintenance of Configuration Library subsection in “Configuration Management and Release Procedure” (PRCD\_CONFIG).  The Project Code is added in Project Code Logs within the “LOGS” main site. | Configuration Administrator |
|  | Place the Customer requirements, Specifications and the Minutes of Meeting under Configuration Management. | Project Manager |
|  | **Prepare the Project Plan** |  |
|  | Prepare Project Plan using “Project Plan Template” (TMPL\_PRJPLN). | Project Manager |
|  | Define the Project’s scope and vision.   * Specify what things need to be developed * Specify additions to core competencies | Project Manager |
|  | Classify the Project. Refer “Project Classification and Tailoring Guidelines” (GDLN\_TAILOR). | Project Manager |
|  | Select appropriate lifecycle for the project. Refer “Project Classification and Tailoring Guidelines” (GDLN\_TAILOR)[[1]](#endnote-1). | Project Manager |
|  | Process Tailoring :  If any deviations or tailoring to the defined processes are foreseen, identify the same using “Tailoring Proposals” section of “Project Planning Template” (TMPL\_PRJPLN) and seek approval from Process Engineering Group (PEG).  Refer “Project Classification and Tailoring Guidelines” (GDLN\_TAILOR) for details. [[2]](#endnote-2)  In cases where one of the PEG members is also the project manager of the project, then PEG team will discuss that proposal and approve the tailoring request accordingly. | Project Manager |
|  | Identify and plan for the work environment required for the project execution. This includes a reference to the Human and material resources plans. Refer “Generic Work Environment” section of “Process Improvement Procedure” (PRCD\_ORGFCS). | Project Manager |
|  | Perform Estimations.   * Arrive at Complexity estimates for each requirement. Refer “Estimation Procedure” (PRCD\_ESTMAT). * Arrive at Effort Estimates in person hours with reference to its complexity and Effort budget. Refer “Estimation Procedure” (PRCD\_ESTMAT). * Identify cumulative efforts required for each phase of the Project. (Refer TMPL\_ESTFNL). | Project Manager |
|  | Plan the budget for Tools, Test Equipment, Product and product component Samples etc. | Project Manager |
|  | Prepare the Resource Plan   * Identify and specify resources required for the project. * Identify the lifecycle phase in which each of the resources shall be needed.   The resources include People, Software and Hardware. Resource Availability is ensured as communicated by the functional head consulting the resource pool.  Consider using the “Resource Selection DAR” (TMPL\_DARRSC) for selection of resources. Refer “Team Formation Guidelines” (GDLN\_TEAMNG) for help in selection of the project team. | Project Manager |
|  | Prepare Project Schedule using MPP based on the   * Effort Estimates * Resource Availability as communicated by the functional head consulting the resource pool * Customer Delivery Date   Consider all support activities like Audits, Trainings, Maintenance Schedules etc. | Project Manager |
|  | Prepare Training Plan  Identify Training needed to ensure that necessary skill levels are present with personnel in sufficient numbers for successful project execution   * The types of Training to be provided * Numbers of Personnel to be trained * Identify Trainings as needed in Technical, Managerial and Supporting Activity Skills | Project Manager |
|  | Prepare the Risk Management Plan   * Identify and list Project Risks using the “Risk Matrix” (TMPL\_RSKMTX) and “Risk Management Procedure” (PRCD\_RSKMGM). | Project Manager |
|  | Prepare Quality Plan | Project Manager |
|  | Prepare the Audit Plan. Refer “Project and Support Groups Quality Assurance Procedure” (PRCD\_AUDITT). Typically, there should be an audit planned in each phase. The audit is split into two parts, first part includes all related to that particular phase except metrics report and second part is only for review of metrics report of that particular phase. Both parts of audit for the phase must be completed before milestone reviews. Audit plan must be validated by PPQA manager. |  |
|  | Prepare Review Plan. |  |
|  | Select work products for independent review by subject matter experts. The work products must be carefully selected based on the project needs. The rationale for selecting the Work Products for independent review must be clearly documented in the project plan.  Care must be taken to select an unbiased reviewer so as to ensure objectivity. The reviewer should preferably be chosen such that they do not have direct association with the project. The SME review constitutes the work product audit of the selected artefacts.  The review findings can be logged by either the reviewer or the reviewee in this specific case, and are closed by the reviewer after resolution by the Work Product owner. The work product thus reviewed is candidate for approval, if relevant. |  |
|  | Prepare Senior Management Review Plan.   * Reviews are conducted with the Senior Management at each Milestone. |  |
|  | Prepare Measurement and Analysis Plan. Refer “Measurement and Analysis Procedure” (PRCD\_MEASUR). |  |
|  | Prepare Test Plan. Refer “Validation Procedure” (PRCD\_VALDTN), “Design Procedure” (PRCD\_DESIGN), “Design Implementation and Module Integration Procedure” (PRCD\_IMPINT). |  |
|  | Prepare Release Plan. Refer “Configuration Management and Release Procedure” (PRCD\_CONFIG). |  |
|  | Prepare a Configuration and Data Management Plan.  Refer “Configuration Management and Release Procedure” (PRCD\_CONFIG). | Project Manager |
|  | Prepare Decision Analysis and Resolution (DAR) Plan.  Refer “Decision Analysis and Resolution Procedure” (PRCD\_DARPRC). | Project Manager |
|  | Plan for Project Monitoring and Control. Refer “Project Monitoring and Control Procedure” (PRCD\_PRJMAC). | Project Manager |
|  | Identify personnel to whom Project issues may be escalated. | Project Manager |
|  | Designate responsibilities based on the resource plan. Update Roles and Responsibilities Matrix in the Project Plan. Refer “Team Formation Guidelines” (GDLN\_TEAMNG) for guidance in selecting the appropriate team members. | Project Manager |
|  | Consider the project plan getting reviewed. Use “Plan Review Checklist” (CHKL\_PLNREV). | Project Manager |
| 27.1 | Send Project Plan to Senior Management for approval. | Project Manager |
|  | Review and approve Project Plan. | Senior Management |
|  | **Post Approval** |  |
| 29. | Place Project Plan under Configuration Management. Communicate the same to all stakeholders via Email. | Project Manager |
| 30. | Update the “Schedules by Milestones” Log with the Project Start Date and Planned Dates for each Milestone. | Project Manager |

\* Improvements/Suggestions are solicited on “Process Improvement Proposals Database”.  
\*For details on the Roles and Responsibilities of the practitioners, Refer "Roles and Responsibility" document in the QMS.

# Verification

* Review of the process and its work products by PPQA members.
* Review and approval of the work products by Senior Management.

# Applicable Measurements

* Schedule Variance
* Effort Variance

# Guidelines

Refer "Configuration Management and Release Procedure" (PRCD\_CONFIG) for Access Rights, location of work products, naming convention and types of controls.

# Exit Criteria/Outputs

* Reviewed and Approved Project Plan
* Uploaded Requirements and Planning Data in the Project’s Environment
* The ascertained Training needs are communicated to the Training Group

1. It is not implied that all tailorings are identified upfront in the project. While an attempt must be made to identify the project’s process as early as possible, tailorings can be sought as and when required in the projects lifecycle. [↑](#endnote-ref-1)
2. [↑](#endnote-ref-2)