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| GENUS INNOVATION LIMITED |
| Project Planning Procedure |
| PRCD\_PRJPLN.docx |
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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 in GIL.ef[[1]](#footnote-1)

# 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. Add a new project to GIL.ef. Refer “Project Management Starter Guide for Non-Admin Users” for details on use of “Projects” module in GIL.ef.  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 is initiated at this point with details of activities leading up to the detailed planning phase and the tentative dates of all the applicable gates for the selected project lifecycle.  Publish the project plan as initial version so that project monitoring activities can start, including but not limited to reporting, tracking and time sheets.  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). | 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 the Projects capture module in GIL.ef. Refer “Project Management Starter Guide for Non-Admin Users” for details on use of “Projects” module in GIL.ef. | Project Manager |
|  | Define the Project’s scope and vision, using the description box.   * 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). This is selected from the project category dropdown.  Contact the PEG head and GIL.ef administrator if a new category needs to be created. | Project Manager |
|  | Select appropriate lifecycle for the project based on the project category. Refer “Project Classification and Tailoring Guidelines” (GDLN\_TAILOR)[[2]](#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. [[3]](#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.  Use the process tailoring [form](https://docs.google.com/forms/d/e/1FAIpQLSdwPKguNKSepmnYTx0tnHamT95LyXBZc8B2-eFhGblJlXt2Iw/viewform) for this. (https://docs.google.com/forms/d/e/1FAIpQLSdwPKguNKSepmnYTx0tnHamT95LyXBZc8B2-eFhGblJlXt2Iw/viewform) | Project Manager |
|  | Identify and plan for the work environment required for the project execution. Refer “Generic Work Environment” section of “Process Improvement Procedure” (PRCD\_ORGFCS). If any specific requirements are identified, use the Asset requirements tab of the project plan. | Project Manager |
|  | Perform Estimations. Refer Estimation Procedure for details. | Project Manager |
|  | Plan the budget for Tools, Test Equipment, Product and product component Samples etc.  Use a combination of the Financial section and the Asset requirements tab for this. | 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. The resources are captured in appropriate fields, including Project Team and Asset Requirements.  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 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   1. Identify the Project Skill requirements. 2. Ensure that each project participant has an updated individual talent map updated. 3. Analyze the talent map and gaps. 4. Identify Training needed to ensure that necessary skill levels are present with personnel in sufficient numbers for successful project execution.   Use attached action items and Project schedule to plan and manage the   * 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 management” module in GIL.ef in line with the “Risk Management Procedure” (PRCD\_RSKMGM). | Project Manager |
|  | Prepare Quality Plan | Project Manager |
|  | Schedule and plan for Audits. Refer “Project and Support Groups Quality Assurance Procedure” (PRCD\_AUDITT). Typically, there should be an audit planned in each phase. Audit for the phase must be completed before milestone reviews. Audit plan must be validated by PPQA manager. |  |
|  | Schedule and plan for Reviews. |  |
|  | 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. |  |
|  | Schedule and plan for Senior Management Reviews.   * Reviews are conducted with the Senior Management at each Milestone. |  |
|  | Prepare Measurement and Analysis Plan. Refer “Measurement and Analysis Procedure” (PRCD\_MEASUR). The measurement goals should be mentioned in project description box of GIL.ef |  |
|  | 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). Use “Configuration & Data Management Plan” (TMPL\_CMPLAN). | Project Manager |
|  | Schedule and plan for Decision Analysis and Resolution (DAR) where ever required. If identified during execution, revise the project 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). Refer Guidelines below. | Project Manager |
|  | Identify personnel to whom Project issues may be escalated. They will typically be the Department head/ Functional head. Refer guidelines section. | Project Manager |
|  | Designate responsibilities based on the resource plan. Update Project Team 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. Note the approval in the publish comments. | Senior Management |
|  | **Post Approval** |  |
| 29. | Publish the Project Plan. Communicate the same to all stakeholders. | 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

# 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

# Guidelines

Refer “Project Management Starter Guide for Non-Admin Users” for details on use of “Projects” module in GIL.ef.

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

## Suggested Frequency of Project monitoring

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| Sr.  No. | Description | Frequency |
| 1. | Senior Management Milestone Review  (SMR) | At each Phase Milestone |
| 2. | Status Review Team Meeting | Daily / Weekly / Fortnightly |
| 3. | Preparation of Metrics report | At each Phase completion |
| 4. | Filling-up of timesheet | Daily |
| 5. | Tracking of Schedule | Daily(By PM, using timesheet entries for the previous day) |
| 6. | Tracking of Risks identified | Weekly status review meetings |
| 7. | Tracking issue log | Weekly status review meetings |
| 8. | Tracking project resource availability and budget | At each Phase Milestone |
| 9. | Project Closure Review | Project Closure |

## Escalation Guideline

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| --- | --- |
| Area | Escalation to |
| Budget | > 10% Overrun - Senior Management |
| Schedule | Schedule deviation > 20% - Senior Management  Schedule deviation > 30% - Customer |
| Training | > 5 Days Training Coordinator  >15 Days Senior Management |
| Technical | > 2 Days Functional Head  >5 Day Project Manager |
| Process | > 3 Days - PEG Head  > 7 Days – Senior Management |
| Risk | RPN > 70 – Hold the Project and escalate to Senior Management |

1. https://gil.einframe.com [↑](#footnote-ref-1)
2. 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)
3. [↑](#endnote-ref-2)