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Project Management Workbook

This material will introduce you to general terms and concepts associated with project management (PM). When you begin working for a specific organization, you will likely find that these terms and the way they are used may be different at your organization.

Defining Project Management

Defining what constitutes a project	Requires one off performance Large enough to need control mechanisms Not a business as usual activity
Greenfield	New implementation
Brownfield	System conversion
Project Management	Project manager is responsible for planning, organizing, and overseeing the execution of a project to achieve its goals and deliverables.

Project Management Result Keywords

Project Manager	Manages process and activities of project management. Oversees execution of projects
Project Charter	Doc providing formal approvals to proceed as project, including scope, objective, participants, time frames and risks as examples
Project Schedule	Tracks progress of project
Gantt Chart	PM tool illustrating work completed over period of time in relation to time planned for work

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Planning

1. Determine the viability of the proposal. Will the final product create enough value to pay for the project costs and give the organization enough benefit (return on investment) to make the effort worthwhile?
2. Get Project Charter signed off to have organizational commitment to support and pay for the project.
3. Plan out project activities. Ensure that the project is going to be controllable.

Execution

1. Collect and plan specific requirements to understand the deliverable.
2. Determine and acquire resources (skill sets) needed to accomplish delivery.
3. Create a schematic or blueprint to detail the build.
4. Perform the work necessary to create a product or prototype.
5. Perform all testing to validate that the deliverable meets the quality and functionality requirements of the customer.
6. Perform testing to validate that introduction of this new product into the environment will not cause harm to the environment or other existing products.
7. Ensure that customers/users are prepared to receive this product (training, user manuals, documentation).
8. Provide a knowledge transfer plan for implementation to execute.
9. Turn over all implementable components to the release process.

Implementation

1. Perform all activities necessary to place the product into the live environment.
2. Execute a Knowledge transfer plan to ensure support personnel are ready to support the end customer.
3. Notify the customer/user community as to the availability of the new product or service.
4. Provide support to operations staff and user community as the service is hooked up for actual usage.

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Closure

1. Finalize documentation for future needs.
2. Pay all outstanding invoices.
3. Validate customer acceptance and satisfaction.
4. Perform any additional activities required to close-out the project.

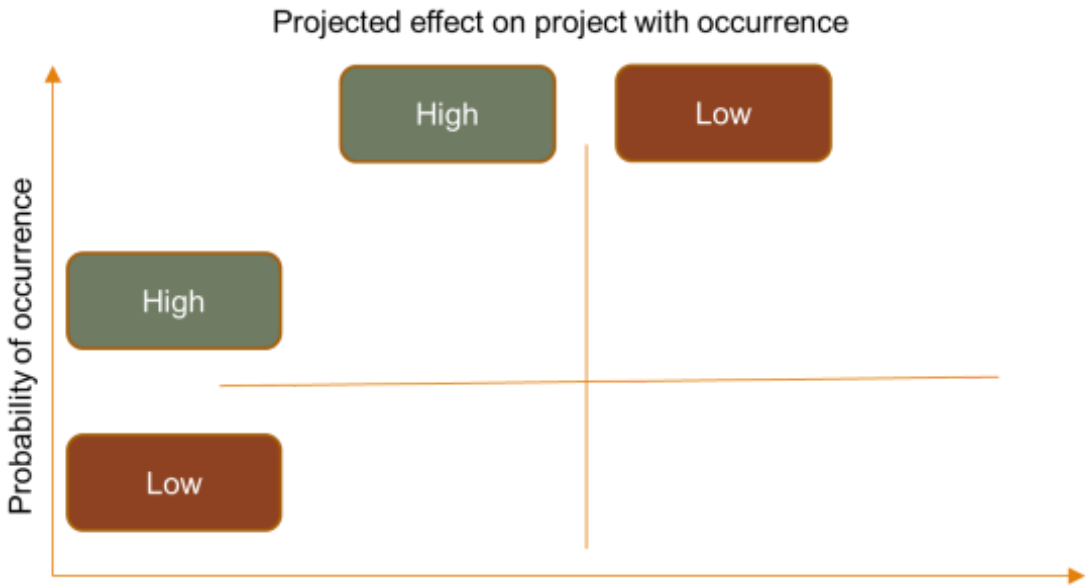
Nine Areas of Attention

Scope	Defines work to be done
Schedule	Control doc to define timing for all activities, including delivery
Cost	Expected and actual cost.
Quality	Evaluating the quality of the deliverables as they are being designed, built, and delivered
Risks	Something that may happen
Issues	Something that is happening or happened (negative)

Stakeholders	Everyone involved in project
Administration	Reports, paperwork, meetings, comms and purchases
Approvals	Initials and milestones completion

Assessing the Importance of a Risk



Mitigation Strategy	Mitigation strategies are developed for probable and significant risks to decrease their likelihood of occurrence.

Risk Register

Database or document that contains details of project risks

Control #	Date Raised	Description	Impact on occurrence	Likelihood of occurrence	Mitigation Strategy	Owner	Status Open/On Hold/Closed
001	10/12/22	Town council may require some changes to bridge design	High - Delays	Low – no issue in past bridge projects	• Engage with council early. • Request same design standards. • If occurs, require a contract extension.	Joe Smith	Open

Required

20 most common risk categories of which to be aware of (When one of these categories is identified as being active, you should determine a mitigation strategy as soon as possible):

1. Purchase and Need not well-defined.
2. Incomplete project design and deliverable definition.
3. Difficulty in defining and understanding project schedules.
4. Risk related to budget.
5. Resistance to change.
6. Risks related to resources.
7. Lack of control over staff priorities.
8. Risk factors related to disputes.
9. Unplanned work risk.
10. Communication issues.
11. Risk related to errors.
12. Escalating project conflicts not reported in a timely manner.
13. Delay in projects.
14. Increased workload due to policy changes, direction or statutes.
15. Health and safety.
16. Change in exchange rates.
17. Quality-related risk.
18. Resource supplier's risk.
19. Risk related to partners.
20. Market-based risk.

Issue Register

Database or document that contains details of issues.

No.	Issue Title	Issue Description	Reported On	Reported By	Owner	Severity	Priority	Status	Comments
1	Code Module Issue	An issue with code module was recently identified. The user is not able to make changes to the rates.	25-02-2015	Neel	Julie	Low	High	New	**SRW 07-Feb** : New Issue logged today.
2	User Access Issue	Some of the users are not able to login.	23-03-2015	Swapnil	Kamel	High	Urgent	WIP	**SRW 25-Mar** : Issue is affecting service levels.
3	Server Memory Issue	One of the server mmx0013 has memory issues and needs to be looked at. This memory issue is causing a performance issue with the application.	26-03-2015	Jack	Cathy	Medium	High	Closed	
4	User Interface Issue	Users are not able to make changes to certain fields when updating.	01-04-2015	Sam	Julie	Low	Medium	OnHold	**SRW 05-Apr** : On Hold due to business confirmation.
5	Spelling Error	One of the fields has a spelling error.	02-04-2015	Neel	Jim	Critical	Low	New	**SRW 04-Apr** : New Issue.

Can a risk also be an issue at the same time? __No_____
Can this be listed in both the risk register and issue register at the same time? __No____
Why or why not?

Once a risk has occurred, it is transferred to an issue, something that happened or is happening

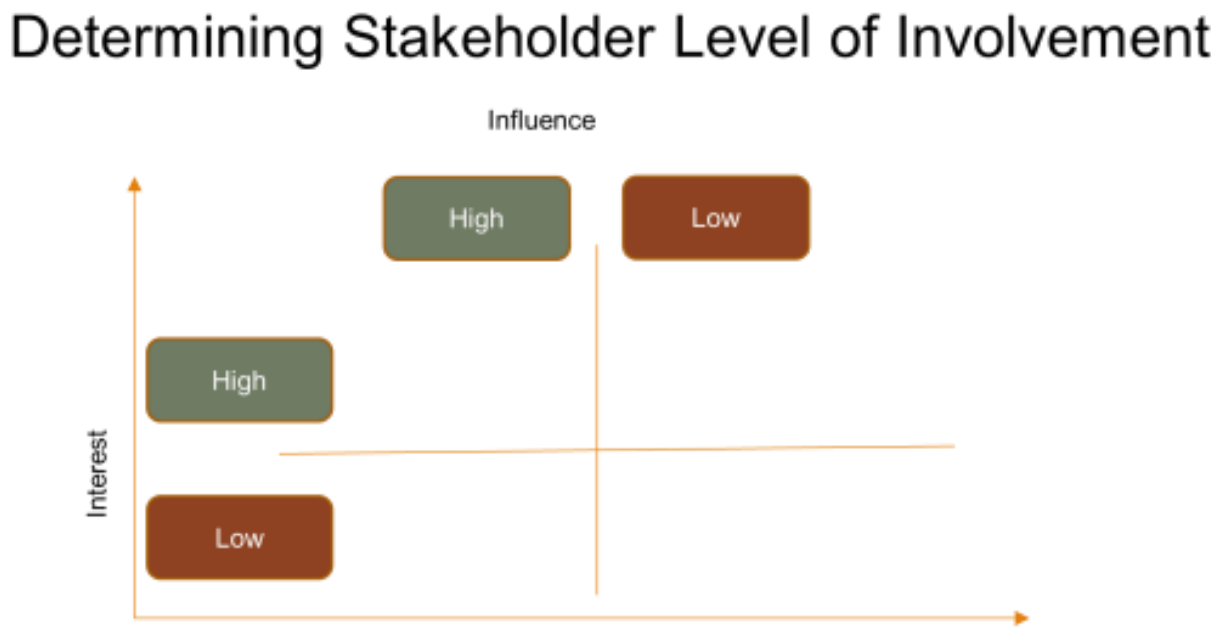
Relationship of Risk to Issue

Focused on present Always negative Documented in Issue Register Response will be issue work-around if not correctable	Evaluated for future Positive/Negative Documented in Risk Register Response performed based on “risk response planning”

Stakeholder	individuals or entities with a vested interest in a project and can significantly influence or be impacted by its outcomes.
Customer	entity that pays for service or product (may or may not be the one who actually uses the service or product directly)

User	entity that consumes/utilizes a service or product.
Supplier	entity that provides products and services used in the creation or delivery of products or services to the end customer
Service Provider	Entity who provides services to customers and users to enhance business productivity

Factors in determining the level of stakeholder involvement:



RACI Usage	Tool used to identify stakeholders and their level of involvement in a project or activity

R—	Responsible for correct execution
A—	Accountable for final result
C—	Consulted to provide additional knowledge and information
I—	Informed or kept up to date regarding progress

RACI Example

	Director Service Management	Service Level Manager	Problem Manager	Security Manager	Procurement Manager
Activity 1	A/R	C	I	I	C
Activity 2	A	R	C	C	C
Activity 3	A/I	R		C	C
Activity 4	I	A	R	I	
Activity 5	I	R	A	R	I

What is the #1 rule for using a RACI matrix?

The #1 rule for using a RACI matrix is to ensure clarity and agreement on each stakeholder's role and level of responsibility for project tasks and decisions

Every business looks to attain three things

1. Achieve Objective

2. Manage Risks
3. Have fully utilized resources

The concept of value is determined by three items:

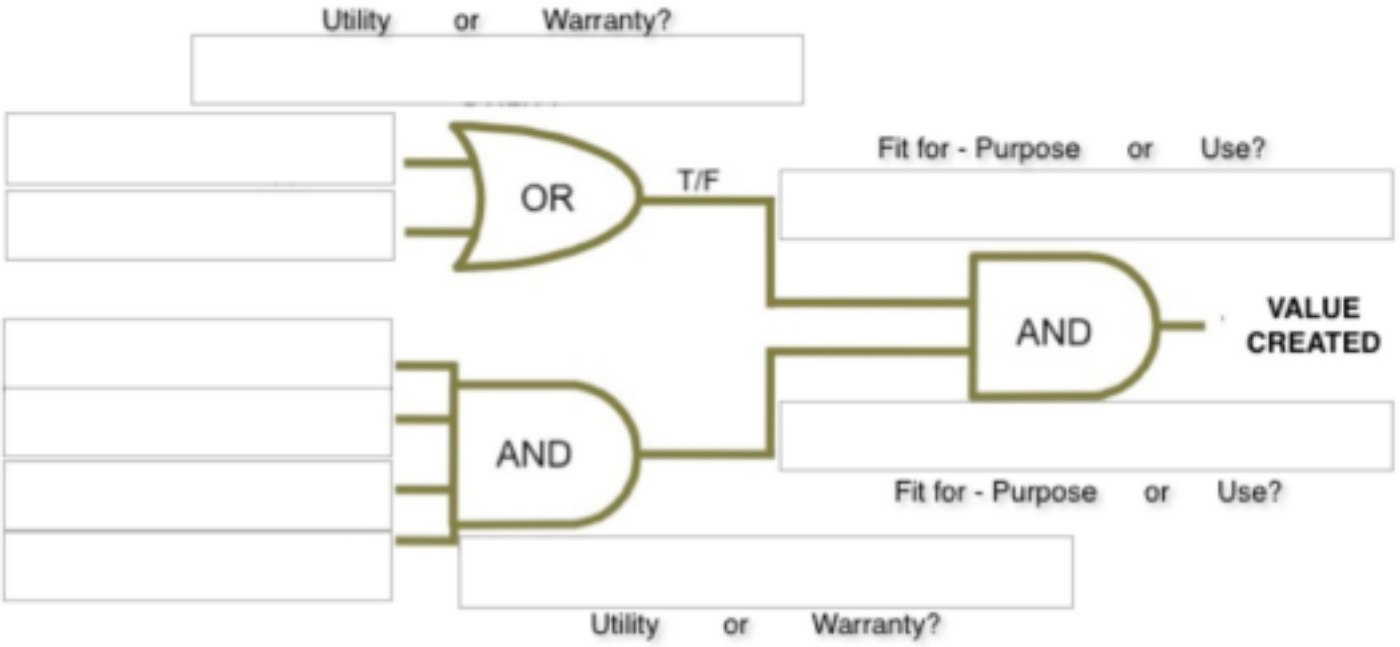
circumstances	Needs or wants	Perception

Why do we want to control the customer's perception of the value of our deliverables?

1. Value is defined by the customer.
2. Affordable mix of features.
3. Achievement of objectives.
4. Value changes over time and circumstances.

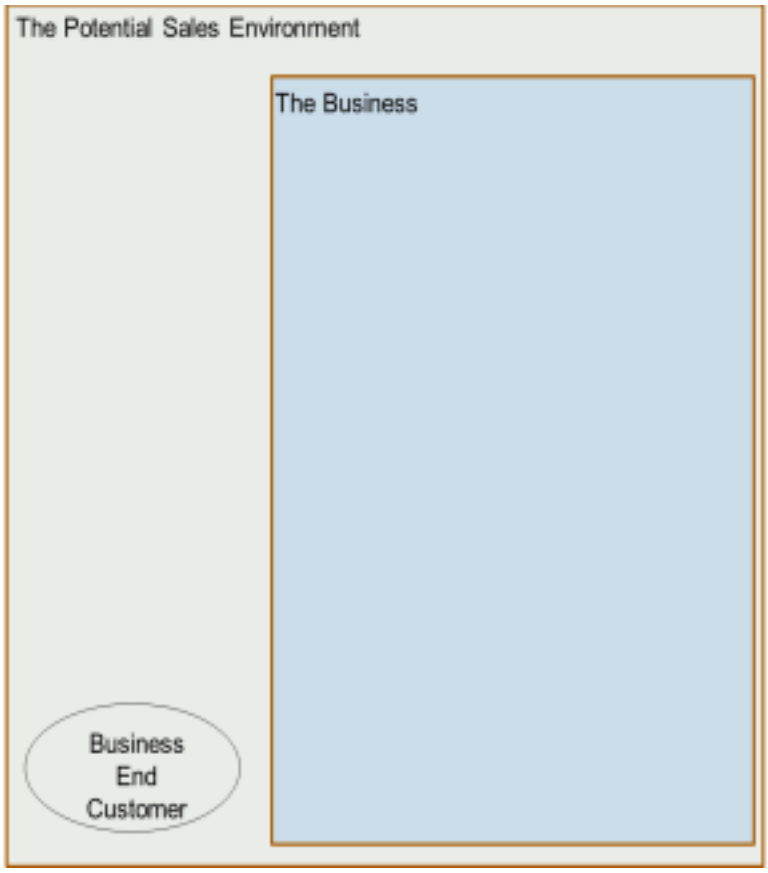
Utility		&	Warranty	
Use	Purpose		Use	Purpose
● Fit for purpose (works as designed). ● Improves probability of achieving outcomes. ● Improves customer performance capability. ● Reduces customer constraints.			●Fit for Use (Guaranteed Consistency of Delivery) Decreases Performance Variation. ● Availability – When needed. ● Capacity – Adequate for business needs. ● IT Service Continuity – Major disruption recovery. ● Security – Are Customer assets secure?	

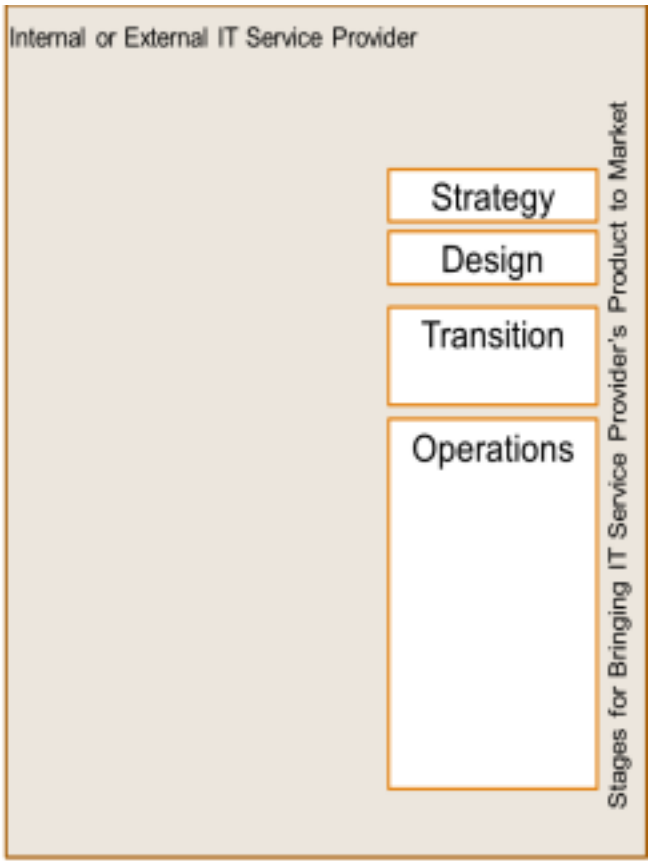
Who's opinion of value is the only opinion that matters? Customer and end-user



What happens when an organization fails to deliver value?

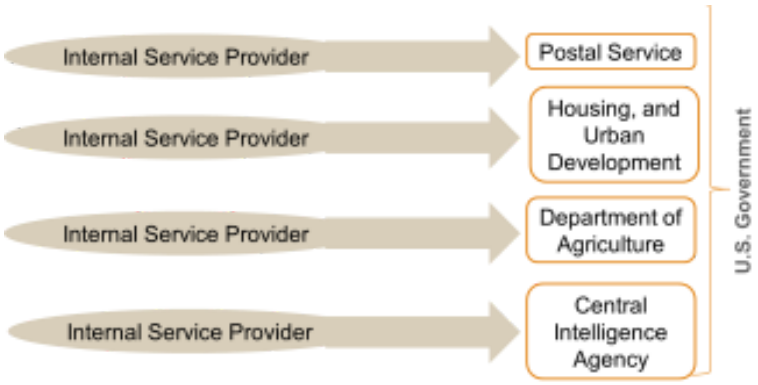
Lose credibility and reliability, and projects fails, losing money





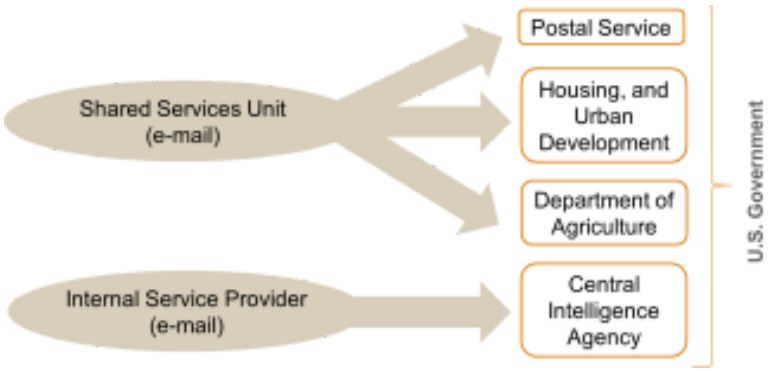
Service Provider Types

Internal Service Provider



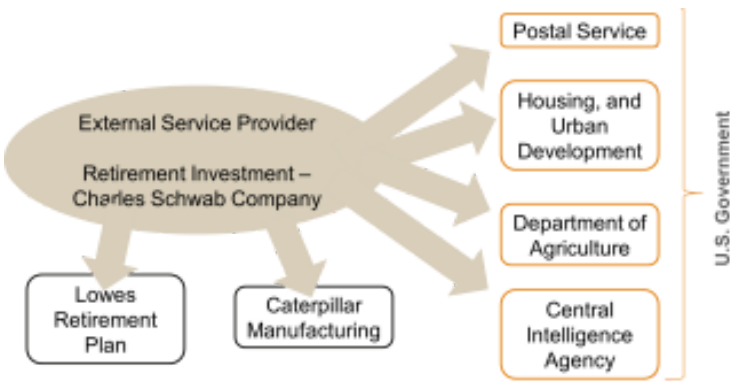
Different business units within an org may have their own internal IT departments to handle projects.

Shared Services Unit



Provides services to multiple internal customers

External Service Provider



Provides services to multiple customers