Phases of a project

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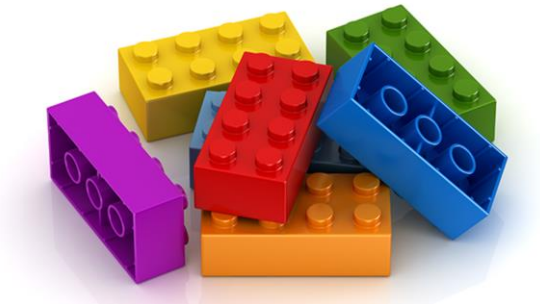
Two important truths to remember:

1. Although there is a widespread recognition that a project consists of 5 phases (PMPBOK®), its implementation must respect and align with the reality of the context:
    1. - The organization and its culture
    2. - The project's specificities
    3. - The stakeholders involved

One size does **not** fit all!

2. Despite the various project management methodologies that exist, they all follow the logic of the 5 stages... what changes is how they orchestrate and when they occur! It's like using the same Lego pieces for different constructions.



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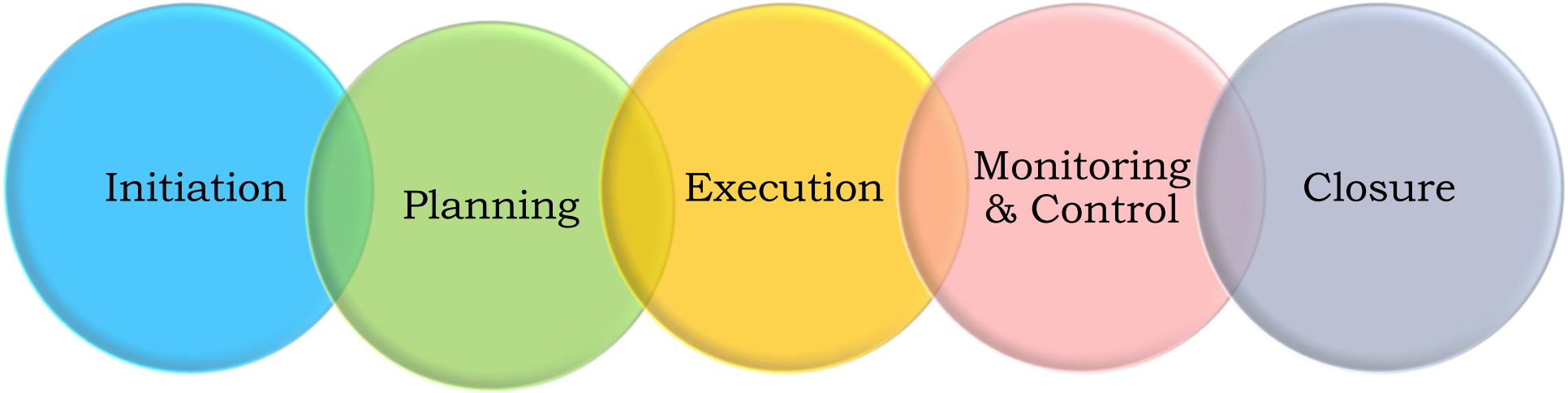

For each phase:

- Objetive to achieve?
- Expected deliverables?
- Who should be envolved?
- What methods and control practices should exist?

Phases of a Project - **Initiation**

Definition and Objective: In this phase, the project is still a 'project of a project' because there may not have been a 'go' from the decision-makers yet. From a formal standpoint, this phase is where the organization delves into a challenge, opportunity, or strategic goal to assess the viability of investing in a project.

INPUTS

A business objective:

- Awarding a contract
- Detection of an efficiency improvement opportunity that requires investment
- Business diversification decisions
- Internationalization decisions
- etc.

Who participates?

- Sponsor
- Project Manager
- Specialized Resources
- (e.g., financial controllers for the business case)

Deliverables

Project Initiation Document (PID):

- Business objectives to achieve
- Business Case (e.g., free cash flow map)
- Stakeholders list

Go / No Go!

Phases of a Project - **Planning**

Definition and Objective: One of the most critical phases for the project's success, involving the creation of a roadmap (who, how, and when) for the project team to execute. During this phase, the project scope is defined, a schedule is developed, and the necessary roles are identified.

INPUTS

Project Initiation Document (PID):

Who participates?

Whole project team

Deliverables

Vision Scope Document:

- Scope and objectives of the project
- Work Breakdown Schedule (WBS)
- Schedule and/or relevant milestones (Gantt Chart). The level of detail should be appropriate to the context
- Stakeholder Analysis
- Definition of role assignments (definition of the organizational structure)
- RACI Matrix
- Communication Plan
- Plan for risk management. Inventory foreseeable risks in advance.

Kickoff meeting for presentation and discussion of the Vision Scope

Phases of a Project - **Execution**

Definition and Objective: Phase where the development of the solution is carried out. In the specific case of a software development project, this phase involves activities such as: requirement management, UI/UX (prototyping and focus groups), coding, Quality Assurance (unit, integration, system, and acceptance testing).

INPUTS

Vision Scope

Who participates?

Permanent:
- Core Team related to Solution Delivery
- Project Manager

When necessary:
- Any project stakeholder

Deliverables

- A working solution according to the requirements
- Descriptive memo of the solution
- Technical documentation
- User manuals
- Quality assurance reports for the product: test cases reports, etc.
- User training
- Handover to support teams (to ensure continuous operation)
- etc.

Phases of a Project– **Monitoring & Control**

Definition and Objective: This phase usually occurs in parallel with the Execution phase. Typically, it consists of periodic monitoring meetings where an average of 2 to 5 KPIs are measured and evaluated, risk management is carried out (action on new detected risks and monitoring of previously identified risks), and change management (new requests, specification changes, requests for date acceleration, etc.)

INPUTS

Project Performance Measurements

Who participates?

Permanent:
- Core Team related to Solution Delivery
- Project Manager

When necessary:
- Any project stakeholder

Deliverables

Project KPIs
- Budget deviations
- Timeline deviations
- Execution: if the project scope is being implemented
- Estimates deviations
- etc.

Phases of a Project– **Closure**

Definition and Objective: The moment when stakeholders agree that the delivered product meets the requirements. There is a very important ceremony called a post-mortem meeting, which involves identifying and discussing lessons learned regarding less positive aspects to prevent future situations and thus systematize the continuous improvement of the management process. Similarly, positive aspects are also identified to be repeated in the future.

INPUTS

The entire project history

Who participates?

The entire project team

Deliverables

- List of improvement points
- List of positive points
- Formal project completion signature
- Final payments
- Placement of all produced documentation in a designated repository
- Team demobilization
- Product handover to support (delivery to a support and maintenance team)
- If applicable, a punch list and respective plan to resolve