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Project Management Workbook

Defining PM

Defining what constitutes a project	• Specific/Cannot be vague • One-off performance • Requires planning • Large enough to need control mechanisms in place • Not business as usual activity
Greenfield	New Implementation
Brownfield	System Conversion
Project Management	Effective management of all activities is required to successfully complete a project. The activities enhance productivity and the control progress.

Project Management Result Keywords

Project Manager	• Planning all activities • Overseeing all execution • Monitoring progress • Reporting to stakeholders
Project Charter	Document that provides formal approval to proceed as a project. • Scope • Objective • Measurements and assumptions • Restrictions • Major participants • Project authority • Expected or approved costs • Timeframes – deliveries and milestones • Key risks • Expectations of the quality of deliverables
Project Schedule	Documents key milestones, which are defined points in a project's schedule and show the progress • Can be displayed as a list or a Gantt Chart • When the appointed time arrives, progress will be measured and compared against the milestone
Gantt Chart	• Schedule of project • What must be done -> when it should be done • Visual tool to identify related timing for activities(Predecessor/Successor)

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Four Phases

Planning

1. Determining the viability of the proposal. Will the final product create enough value to pay for the project costs; and give the organization enough benefit (ROI) 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.

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.

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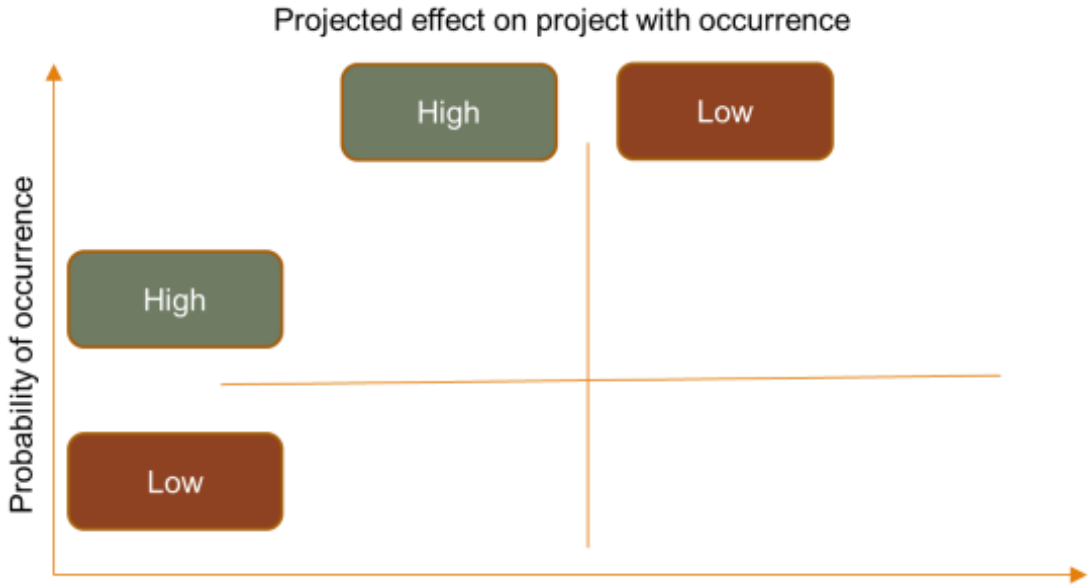
Nine Areas of Attention

Scope	Defines the work to be done. • How much work • All expectations – Quality, Cost, Delivery, etc.
Schedule	Control document defining timing for all project 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 might happen (positive or negative).
Issues	Something that is happening or has happened (always negative).
Stakeholders	Who is impacted by the project? Has the group of "affected" changed?
Administration	Reports, Paperwork, Meetings, Communication, and Purchases.
Approvals	Approvals – Initial, Milestone, Completion (acceptance), etc.

RISK	ISSUE
An uncertain event or set of circumstances that should it occur, will affect the achievement of objectives. Risks are measured by the perceived probability and magnitude of impact. Something that might happen.	Is a risk that has happened or is happening.

Assessing the Importance of a Risk



Mitigation Strategy	A Mitigation Strategy should be created for any risk deemed probable to occur and dangerous enough to address. The Mitigation Strategy will lessen the probability of the occurrence. • Implement the mitigation strategy, determine the mitigation strategy for responding to the occurrence should it happen, and document both the risk and mitigation strategy in the Risk Register.

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

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20 most common risk categories of which to be aware. 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.

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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 mms0013 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? Yes

Can this be listed in both the risk register and issue register at the same time? Yes

Why or why not?

If a risk can occur multiple times, I could have it both in the risk register and the issue register.

Relationship of Risk to Issue

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

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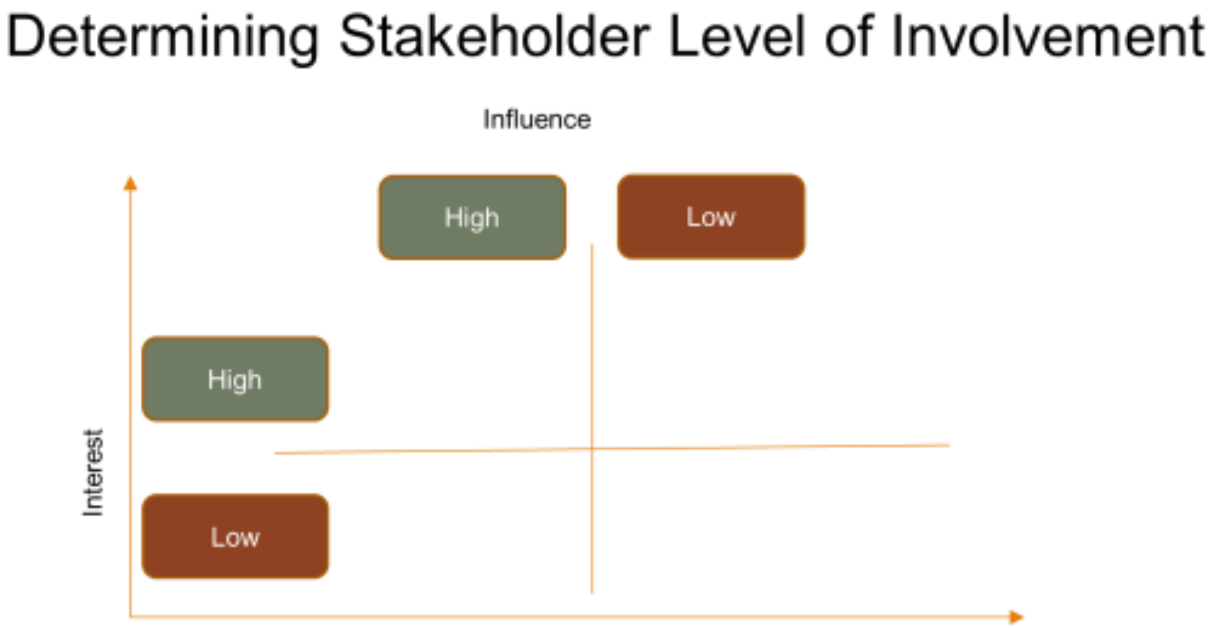
Understanding Stakeholders RACI

Stakeholder	A stakeholder is any entity with an interest in the outcome of a project. • Who will receive benefit from the project? • Who could interrupt the project? • Who is providing funding for the project? • Who will operate the project "work product" when complete? • Who will be involved in project delivery activities?
Customer	A customer is the entity that pays for a service or product. This entity also has the authority to determine how "valuable" the service or product is to themselves. In other words, if the value exists, the entity will agree to pay for the development and ongoing costs. If the value does not meet their definition, they will look for another source of satisfaction.
User	An end-user or user is the entity that consumes/utilizes a service or product. This entity uses a service or product to satisfy the needs/wants of the customer. Usually, this entails the end-user achieving some level of productivity to allow the customer's business to achieve its goal. The user may or may not be the customer.
Supplier	The supplier is an entity that provides products and services used in the creation or delivery of products or services to the end customer. This provision could be hardware, software, consulting services, or other products.
Service Provider	In IT, this entity provides services to customers and users to enhance business productivity. The service provider is responsible for the quality and consistency of delivery, and may be owned by the customer or an external entity.

Factors in determining the level of stakeholder involvement:



RACI Usage	A tool used to identify stakeholders and their level of involvement in a project or activity.
Responsible	for correct execution
Accountable	for final result
Consulted	to provide additional knowledge and information
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

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

- Only one person accountable per activity or row

Every business looks to attain 3 things

1. Achieve objective
2. Manage risks
3. Have fully utilized resources

The concept of value is determined by 3 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 feature
3. Achievement of objectives
4. Value changes over time and circumstances

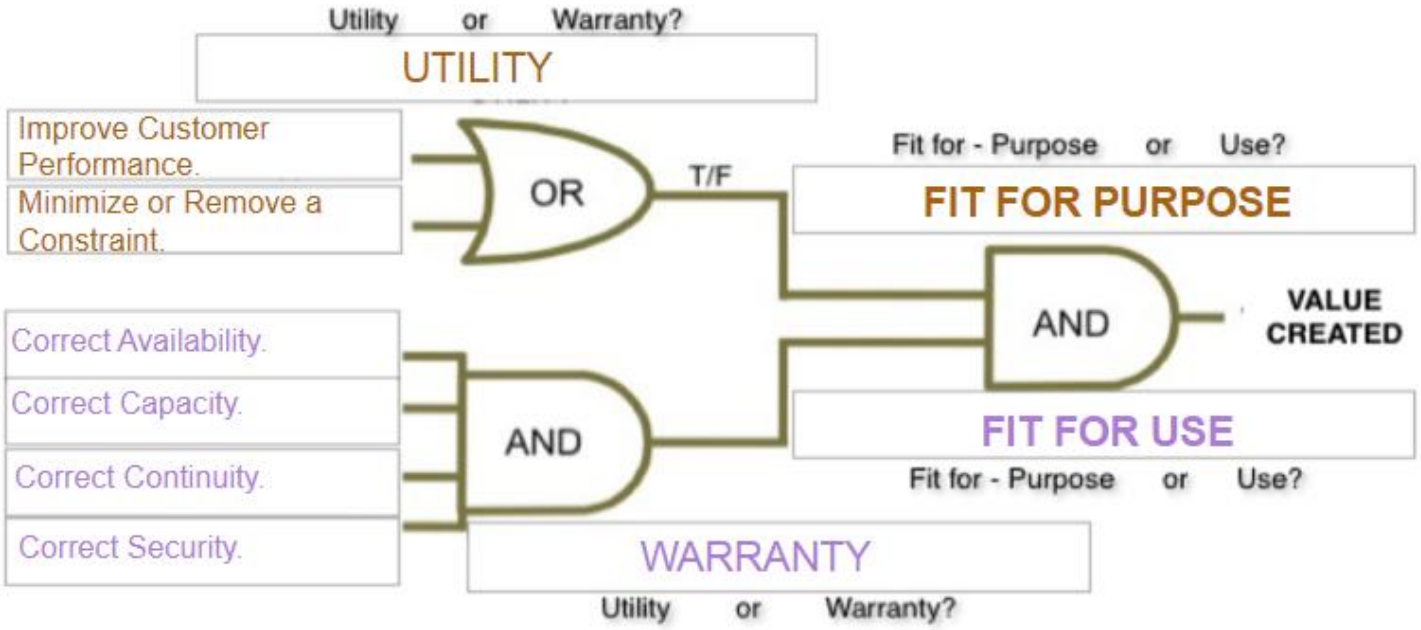
Value is defined in **business terms** from the **customer's perspective**!

Utility & Warranty

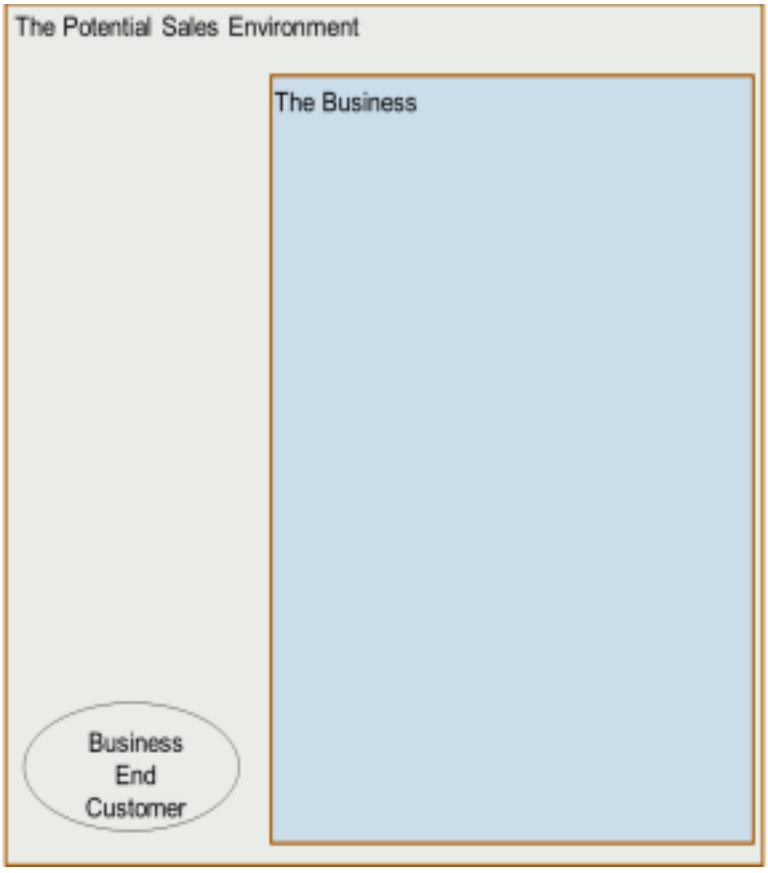
Utility(Functionality)	Warranty
Fit for purpose (works as designed). ● Improves probability of achieving outcomes. ● Improves customer performance capability. ● Reduces customer constraints.	**Fit for Use (Guaranteed Consistency of Delivery)** *Decreases Performance Variation* ● Availability – When needed.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

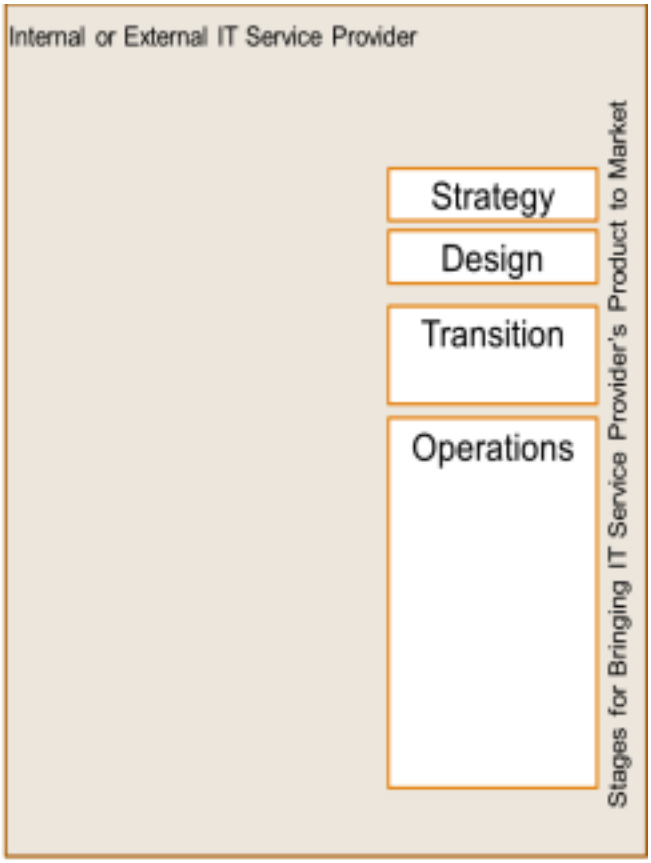
Whose opinion of value is the only opinion that matters?

The customer



What happens when an organization fails to deliver value?





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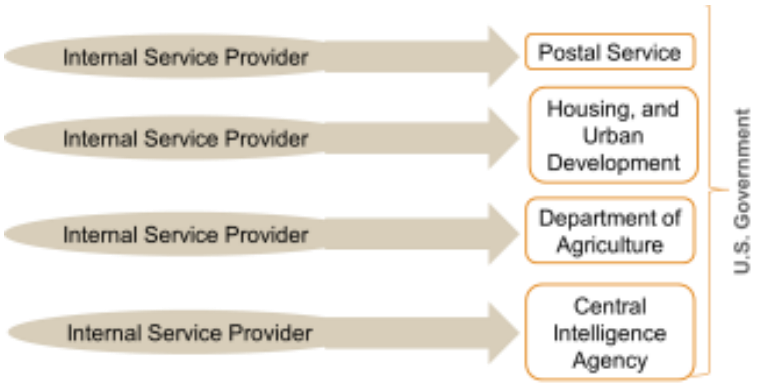
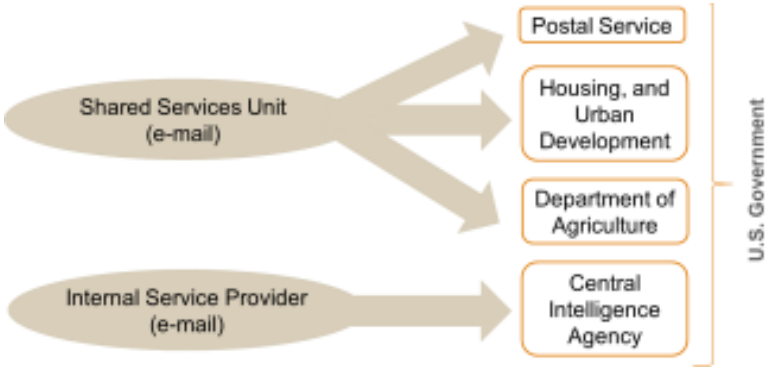
Service Provider Types

Internal Service Provider



Shared Services Unit



External Service Provider