

Familiarization to Roles

1. Read role description and responsibilities of the role given to you & try to understand and assimilate (10 min)
2. Write your question on some separate note (we will discuss that based on the context)
3. Ask questions to the trainer (10 min)
4. Come on stage and explain your role to others. (10 min for each role)
5. During one group/person speaking about their responsibilities other students must listen carefully and make note of it.

1 PROJECT BOARD (PB)

- # The Project Board is accountable to corporate or programme management for the success of the project, and has the authority to direct the project within the remit set by corporate or programme management as documented in the project mandate.
- # The Project Board is also responsible for the communications between the project management team and stakeholders external to that team (e.g. corporate and programme management).
- # According to the scale, complexity, importance and risk of the project, Project Board members may delegate some Project Assurance tasks to separate individuals. The Project Board may also delegate decisions regarding changes to a Change Authority.

General responsibilities

- **During start-up and initiation:**
 - Confirm project tolerances with corporate or programme management
 - Approve the Project Brief
 - Approve the Stage Plan for the initiation stage
 - Authorize project initiation
 - Decide whether to use a Change Authority and, if so, agree the level of authority to be delegated
 - Set the scale for severity ratings for issues
 - Set the scale for priority ratings for requests for change and off-specifications
 - Approve the supplier contract (if the relationship between the customer and supplier is a commercial one)
 - Approve the Project Initiation Documentation (and its components)
 - Authorize the start of the project.
- **During the project:**
 - Set tolerances for each stage and approve Stage Plans
 - Authorize each management stage and approve the Product Descriptions for each stage
 - Approve Exception Plans when stage-level tolerances are forecast to be exceeded
 - Communicate with stakeholders as defined in the Communication Management Strategy (including briefing corporate or programme management about project progress)
 - Provide overall guidance and direction to the project, ensuring it remains viable and within any specified constraints
 - Respond to requests for advice from the Project Manager
 - Ensure that risks are being tracked and managed as effectively as possible
 - Approve changes (unless delegated to a Change Authority)
 - Make decisions on escalated issues
 - Approve completed products.
- **At the end of the project:**
 - Provide assurance that all products have been delivered satisfactorily
 - Provide assurance that all acceptance criteria have been met
 - Confirm acceptance of the project product
 - Approve the End Project Report and ensure that any issues, lessons and risks are documented and passed on to the appropriate body

- Authorize follow-on action recommendations and Lessons Reports to be distributed to corporate or programme management
- Transfer responsibility for the updated Benefits Review Plan to corporate or programme management
- Authorize project closure and send project closure notification to corporate or programme management.

Competencies

To be successful, the Project Board should:

- Have sufficient authority to make decisions, approve plans and authorize any necessary deviation from Stage Plans
- Have sufficient authority to allocate resources to the project
- Be capable of adequately representing the business, user and supplier interests Ideally be able to stay with the project throughout its life. Key competencies include:
 - Decision making
 - Delegation
 - Leadership
 - Negotiation and conflict resolution.

2 EXECUTIVE / PMO (Project Management Office) Head

- # The Executive is ultimately responsible for the project, supported by the Senior User and Senior Supplier.
- # The Executive's role is to ensure that the project is focused throughout its life on achieving its objectives and delivering a product that will achieve the forecast benefits.
- # The Executive has to ensure that the project gives value for money, ensuring a cost-conscious approach to the project, balancing the demands of the business, user and supplier.
- # Throughout the project, the Executive is responsible for the Business Case.
- # The Project Board is not a democracy controlled by votes. The Executive is the ultimate decision maker and is supported in the decision making by the Senior User and Senior Supplier.
- # In addition to the Project Board's collective responsibilities, the Executive/PMO Head will have following

- **Accountabilities**

- Optimum utilization of all kind of all resource (human, equipment, material, expenses) in various projects across the organization. *To avoid the conflict of this responsibility with functional head PMO head should know ratio of work each person's time assigned to project between operations & projects.*
- Knowledge management. *PMO head should own & maintain a configuration management system. All the documents should be managed project wise. Entire project team should access documents from this system and nowhere else. Ownership of each folder should be with PMT members.*
- Project Management Methodologies/Process standardization. *All the project management processes & methodologies should be defined, refined, standardized and benchmarked by PMO Head based on the industry practices and organization culture & capabilities.*
- Project Audits (process, governance, tracking, document management, risk etc). *Routinely PMO head should perform Configuration Audit, Quality Audit & Risk Audit of the projects.*
- Ensure each project within "TEAM" get successfully done as per the commitment to customer and management. *He should ensure project are properly baselined and all major stakeholders like customer, management & functional head are involved in baselining of the project.*
- Help project managers in planning
- Project Governance. *PMO head should maintain dashboards at project, organization & department level. He should ensure right data is being captured at right level from right person. He should take corrective and preventive action whenever there is risk is perceived or issue occurred.*
- Taking direction from COO on periodic basis.
- Escalating issues beyond PMO Head's threshold to COO
- Helps presales/proposal team in validating estimate, capability, availability. No proposal should be submitted to customer without PMO head's input consideration.
- Issue Project Charter

- **General**

- With the help of PMT and systems, resolve dependencies, which are across the projects.
- First level escalation for PM
- PMO Head is accountable towards the COO
- Highest authority in project management to make the decisions.

3 SENIOR USER (SU) / Marketing/Sales/Customer Rep

- # The Senior User(s) is responsible for specifying the needs of those who will use the project's products, for user liaison with the project management team, and for monitoring that the solution will meet those needs within the constraints of the Business Case in terms of quality, functionality and ease of use.
- # The role represents the interests of all those who will use the project's products (including operations and maintenance), those for whom the products will achieve an objective or those who will use the products to deliver benefits. The Senior User role commits user resources and monitors products against requirements. This role may require more than one person to cover all the user interests. For the sake of effectiveness, the role should not be split between too many people.
- # The Senior User(s) specifies the benefits and is held to account by demonstrating to corporate or programme management that the forecast benefits which were the basis of project approval have in fact been realized. This is likely to involve a commitment beyond the end of the life of the project.

Responsibilities

In addition to the Project Board's collective responsibilities, the Senior User(s) will:

- Provide the customer's quality expectations and define acceptance criteria for the project
- Ensure that the desired outcome of the project is specified
- Ensure that the project produces products that will deliver the desired outcomes, and meet user requirements
- Ensure that the expected benefits (derived from the project's outcomes) are realized
- Provide a statement of actual versus forecast benefits at the benefits reviews
- Resolve user requirements and priority conflicts
- Ensure that any user resources required for the project (e.g. to undertake user quality inspections and product approval) are made available
- Make decisions on escalated issues, with particular focus on safeguarding the expected benefits
- Brief and advise user management on all matters concerning the project
- Maintain business performance stability during transition from the project to business as usual
- Provide the user view on follow-on action recommendations
- Undertake Project Assurance from the user perspective (user assurance) and, where appropriate, delegate user Project Assurance activities (see section C. 7).

4 Senior Supplier (SS) / HoD / Supplier Partners

- # The PMT/SS represents the interests of those designing, developing, facilitating, procuring and implementing the project's products.
- # This role is accountable for the quality of products delivered by the supplier(s) and is responsible for the technical integrity of the project. If necessary, more than one person may be required to represent the suppliers.
- # Depending on the particular customer/supplier environment, the customer may also wish to appoint an independent person or group to carry out assurance on the supplier's products (for example, if the relationship between the customer and supplier is a commercial one).

Responsibilities

In addition to the Project Board's collective responsibilities, the Senior Supplier will:

- Assess and confirm the viability of the project approach
- Ensure that proposals for designing and developing the products are realistic
- Advise on the selection of design, development and acceptance methods
- Ensure that the supplier resources required for the project are made available
- Make decisions on escalated issues, with particular focus on safeguarding the integrity of the complete solution
- Resolve supplier requirements and priority conflicts
- Brief non-technical management on supplier aspects of the project
- Ensure quality procedures are used correctly, so that products adhere to requirements
- Undertake Project Assurance from the supplier perspective (supplier assurance) and, where appropriate, delegate supplier Project Assurance activities.

5 PROJECT MANAGER (PM)

- # The Project Manager has the authority to run the project on a day-to-day basis on behalf of the Project Board within the constraints laid down by them.
- # The Project Manager's prime responsibility is to ensure that the project produces the required products within the specified tolerances of time, cost, quality, scope, risk and benefits.
- # The Project Manager is also responsible for the project producing a result capable of achieving the benefits defined in the Business Case.

Responsibilities

The Project Manager's responsibilities include the following:

- Accept project charter from PMO head
- Coordinate with PMT and create a Project plan
- Get project plan approved from Project Board
- Ensure day to day impediments are logged and Resolve directly or with the help of PMT
- Maintain all the project documents up to date
- Ensure every project he is doing is sufficiently planned.
- Manage day to day project show. Authorize work work to PT. Make sure PMT & PT understand the work.
- Ensure configuration management system in place
- Ensure risk management system in place
- Ensure he understands project & stage thresholds
- Ensure he understands project requirements fully
- Completing each milestone and project within the cost, time, scope, quality, risk, benefit tolerance defined in project baseline
- PM is accountable towards the PMO Head
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- Prepare the following baseline management products, in conjunction with any Project Assurance roles, and agree them with the Project Board:
 - Project Brief, including the Project Product Description
 - Benefits Review Plan
 - Project Initiation Documentation (and its components)
 - Stage/Exception Plans and their Product Descriptions
 - Work Packages
- Prepare the following reports:
 - Highlight Reports
 - Issue Reports
 - End Stage Reports
 - Lessons Reports
 - Exception Reports
 - End Project Report
- Maintain the following records
 - Issue Register
 - Risk Register
 - Daily Log

- Lessons Log
- Liaise with corporate or programme management to ensure that work is neither overlooked nor duplicated by related projects
- Liaise with any external suppliers or account managers
- Lead and motivate the project management team
- Ensure that behavioural expectations of team members are established
- Manage the information flows between the directing and delivering levels of the project
- Manage the production of the required products, taking responsibility for overall progress and use of resources and initiating corrective action where necessary
- Establish and manage the project's procedures - risk management, issue and change control, configuration management, and communication
- Establish and manage the project controls monitoring and reporting
- Authorize Work Packages
- Advise the Project Board of any deviations from the plan
- Unless appointed to another person(s), perform the Team Manager role (see section (6))
- Unless appointed to another person (or corporate/programme function), perform the Project Support role (see section (9))
- Implement the Configuration Management Strategy
- Ensure project personnel comply with the Configuration Management Strategy
- Schedule configuration audits to check that the physical products are consistent with the Configuration Item Records and initiate any necessary corrective action.

Competencies

Different types of project will require different types of project management skills. To be successful, the Project Manager must be able to balance the different aspects of the Project Manager role for a particular project. Key competencies include:

- Planning
- Time management
- People management
- Problem solving
- Attention to detail
- Communication
- Negotiation
- Conflict management.

6 PROJECT MANAGEMENT TEAM (PMT) MEMBER

The Team Manager's prime responsibility is to ensure production of those products defined by the Project Manager to an appropriate quality, in a set timescale and at a cost acceptable to the Project Board. The Team Manager role reports to, and takes direction from, the Project Manager.

- **Accountabilities**

- The team is primarily responsible for project planning and governance at ground level.
- All PMT should participate in daily standup meeting. If they want they can bring PT member for the meeting.
- PMT should resolve impediments or escalate to PM and department heads.
- Makes the decision in project of behalf of their department
- Communicate with other members of PMT of the project
- Communicate with other members of other PMT
- Routine review with PM
- Accountable for their decisions taken or not taken
- Accountable towards PM
- Ensure right skilled PT Members are available for project
- In consultation with their functional managers ensure employees have desired skills to complete the work

- **General**

- Project Management team is a team of people dedicated from functions for project coordination, estimation, verifying estimates, resolving dependencies and making commitment for project.
- PMT is dedicated for the project. Not for the function or PMO.
- Every project should have a well defined PMT
- PMT is not group of many persons but a Team working together to help PM.
- In a project no matter from whom they take inputs (peer, boss, junior, supplier) but they bring the information on table to make the decisions and drive the decision on behalf of their division. Decisions are made by PM, PMO Head depending on decision type.
- PMT should be always available to PM and PT.
- A member of project 1's PMT can be member of project 2's PMT.
- PMT members are accountable to Project Manager

Responsibilities

- Prepare the Team Plan and agree it with the Project Manager
- Produce Checkpoint Reports as agreed with the Project Manager
- Plan, monitor and manage the team's work
- Take responsibility for the progress of the team's work and use of team resources, and initiate corrective action, where necessary, within the constraints laid down by the Project Manager
- Identify and advise the Project Manager of any issues and risks associated with a Work Package

- Advise the Project Manager of any deviations from the plan, recommend corrective action, and help to prepare any appropriate Exception Plans
- Pass back to the Project Manager products that have been completed and approved in line with the agreed Work Package requirements
- Liaise with any Project Assurance and Project Support roles
- Ensure that quality activities relating to the team's work are planned and performed correctly, and are within tolerance
- Ensure that the appropriate entries are made in the Quality Register
- Manage specific issues and risks as directed by the Project Manager
- Assist the Project Manager in examining issues and risks
- Ensure that all assigned issues are properly reported to the person maintaining the Issue Register.

Competencies

- Different types of project will require different types of skills from the Team Manager. Key competencies are similar to that of a Project Manager.

7 PROJECT ASSURANCE (PA)

Project Assurance covers the primary stakeholder interests (business, user and supplier). Project Assurance has to be independent of the Project Manager; therefore the Project Board cannot delegate any of its assurance activities to the Project Manager.

Responsibilities

The implementation of the assurance responsibilities needs to answer the question: what is to be assured? A list of possibilities applicable to the business, user and supplier stakeholder interests would include ensuring that:

- Liaison is maintained between the business, user and supplier throughout the project
 - Risks are controlled
 - The right people are involved in writing Product Descriptions
 - The right people are planned to be involved in quality inspection at the correct points in the products' development
 - Staff are properly trained in the quality methods
 - The quality methods are being correctly followed
 - Quality control follow-up actions are dealt with correctly
 - An acceptable solution is being developed
 - The scope of the project is not changing unnoticed
 - Internal and external communications are working
 - Applicable standards are being used
 - The needs of specialist interests (for example, security) are being observed.
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- Business assurance responsibilities
 - Assist the Project Manager to develop the Business Case and Benefits Review Plan (if it is being prepared by the Project Manager)
 - Advise on the selection of project management team members
 - Advise on the Risk Management Strategy
 - Review the Business Case for compliance with corporate or programme standards
 - Verify the Business Case against external events and against project progress
 - Check that the Business Case is being adhered to throughout the project
 - Check that the project remains aligned to the corporate or programme strategy
 - Review project finance on behalf of the customer
 - Verify that the solution continues to provide value for money
 - Periodically check that the project remains viable
 - Assess that the aggregated risk exposure remains within project tolerance
 - Check that any supplier and contractor payments are authorized
 - Review issues and risks by assessing their impact on the Business Case
 - Constrain user and supplier excesses
 - Inform the project management team of any changes caused by a programme of which the project is part (this responsibility may be transferred if there is other programme representation on the project management team)
 - Monitor stage and project progress against the agreed tolerances. User assurance responsibilities
 - Advise on stakeholder engagement
 - Advise on the Communication Management Strategy
 - Ensure that the specification of the user's needs is accurate, complete and unambiguous

- Assess whether the solution will meet the user's needs and is progressing towards that target
 - Advise on the impact of potential changes from the user's point of view
 - Monitor risks to the user
 - Ensure that the quality activities relating to products at all stages has appropriate user representation
 - Ensure that quality control procedures are used correctly to ensure that products meet user requirements
 - Ensure that user liaison is functioning effectively.
- Supplier assurance responsibilities
 - Review the Product Descriptions
 - Advise on the Quality Management Strategy and Configuration Management Strategy
 - Advise on the selection of the development strategy, design and methods
 - Ensure that any supplier and operating standards defined for the project are met and used to good effect
 - Advise on potential changes and their impact on the correctness, completeness and integrity of products against their Product Description from a supplier perspective
 - Monitor any risks in the production aspects of the project
 - Assess whether quality control procedures are used correctly, so that products adhere to requirements.

Competencies

To be successful, Project Assurance should:

- Be capable of adequately representing the business, user or supplier stakeholder interests
- Have sufficient credibility to ensure that advice and guidance are followed
- Have sufficient specialist knowledge of the business, user or supplier stakeholder areas
- Ideally be able to stay with the project throughout its lifecycle. Key competencies include:
 - Diplomacy
 - Thoroughness
 - Attention to detail
 - Communication.

8 CHANGE AUTHORITY (CA)

- # The Project Board may delegate authority for approving responses to requests for change or off-specifications to a separate individual or group, called a Change Authority.
- # The Project Manager could be assigned as the Change Authority for some aspects of the project (e.g. changing baselined Work Packages if it does not affect stage tolerances).

Responsibilities

- Review and approve or reject all requests for change and off-specifications within the delegated limits of authority and change budget set by the Project Board
- Refer to the Project Board if any delegated limits of authority or allocated change budget are forecast to be exceeded.

Competencies

The Change Authority should:

- Be capable of adequately representing the business, user and supplier stakeholder interests
- Have sufficient credibility to ensure that advice and guidance are followed
- Have sufficient specialist knowledge of the business, user or supplier stakeholder areas. Key competencies include:
 - Decision making
 - Planning
 - Attention to detail
 - Problem solving.

9 PROJECT SUPPORT (PS)

- # The provision of any Project Support on a formal basis is optional. If it is not delegated to a separate person or function it will need to be undertaken by the Project Manager.
- # One support function that must be considered is that of configuration management. Depending on the project size and environment, there may be a need to formalize this and it may become a task with which the Project Manager cannot cope without support.
- # Project Support functions may be provided by a project office or by specific resources for the project. Refer to OGC's guidance Portfolio, Programme and Project Support Offices (2008) for further information on the use of a project office.

Responsibilities

The following is a suggested list of tasks:

- Set up and maintain project files
- Establish document control procedures
- Collect actuals data and forecasts
- Update plans
- Administer or assist the quality review process
- Administer or assist Project Board meetings
- Assist with the compilation of reports
- Contribute expertise in specialist tools and techniques (for example, planning and control tools, risk analysis)
- Maintain the following records
 - Quality Register
 - Configuration Item Records
 - Any other registers/logs delegated by the Project Manager
- Administer the configuration management procedure (these responsibilities may be undertaken by a configuration librarian from corporate or programme management):
 - Administer the receipt, identification, versions, storage and issue of all project products
 - Provide information on the status of all products (by preparing and issuing Product Status Accounts)
 - Archive superseded product copies
 - Ensure the security and preservation of the master copies of all project products
 - Maintain a record of all copies issued
 - Notify holders of any changes to their copies
 - Number, record, store and distribute Issue Reports
 - Conduct configuration audits.

Competencies

Typical competencies for Project Support roles will depend on the type of project and organization.

Key competencies include:

- Administration and organization
- Knowledge of specialist tools and techniques
- Knowledge of corporate or programme management standards applicable to the project.

10 Project Team (PT):

Project Team is delivery team, consisting of permanent employees from various departments or contract work force. PMT member can also be PT member

- Complete the work as per the plan
- Report project progress/impediments on the daily basis to the PMT
- If required, take technical help from PMT or his department
- Report the actuals (cost, efforts, risk, issues) on the daily basis to the project manager