

Business Generic Project Management Plan

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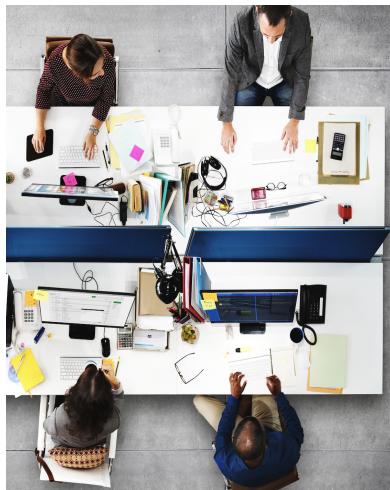
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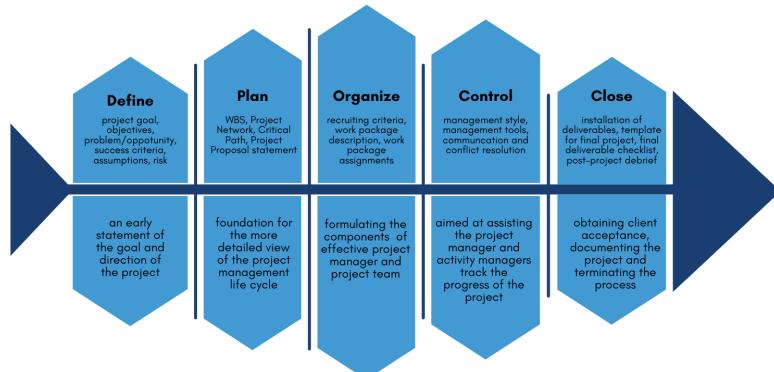
IDE 761 – Strategies in Educational Project Management
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Dr. Gary E La Point

Executive Summary



PROJECT GRAPHIC



This project aims to create a project management plan (PMP) to help Instructional Design Productions Incorporated (IDPI) company (client) in efficiently improving the instructional solutions they develop. Currently, IDPI designs instructional products: instructor-led workshops, instructor-led online courses, and self-study online courses. As IDPI grows, the need for new more efficient project management solutions became clear for the company and they requested assistance.

The new PMP strategy for the client includes the key tasks in the five-phase project management (Weiss, J.W. and Wysocki, 1992) along with the elements of the ADDIE model. The report presented shows a part of the full PMP developed and presented to the client and covers basic steps throughout the project.

Define phase gives overall information of the project being developed. Its goals and objectives set the direction of the PMP as we understand it, and have it confirmed with the client. Plan phase lists the major activities of the project, its sequence and expected deadlines. Work breakdown structure organizes the activities, critical path links tasks into chains that directly affects the project finish date. Define and Plan phases deliverables altogether formulate the project proposal that shows a brief summary of the project to the client.

The Organize phase groups the personnel requirement, work packages and reporting relationship in a team. The Control Phase sets a number of tools that assist project management during the project development such as Gantt chart, Variance report, Communication Plan, Risk-Management Plan and Schedule resolution. The Close phase gives information about client sign-off, close down the project, debrief the project and celebrate the accomplishments as a team. Overall, the second phase of the project is called Implementation and provides information on the Project Management Plan for a client that meets the success criteria and the client's needs while following the cost, time and quality standards.

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Define

Introduction: The Define Phase is the first phase of the project and is required to clearly identify the problem to be solved and used to set the goal of the project, the objectives of the project, the project's scope, task milestones, assumptions and risks, and the resources required and available. It is a critical stage as it sets the tone for the project and becomes the reference for all future phases of the project, often used to clarify misunderstandings and settle disagreements among project team members.

Problem/Opportunity

IDPI is an award winning company that designs instructional products for educational, governmental, business, and industrial clients. These products include instructor-led workshops, instructor-led online courses, and self-study online courses. Over time the directors for each of these product lines have developed informal yet distinct project management approaches and processes which has led to staff confusion and decreased effectiveness. The need for a consolidated and consistent project management approach has become clear with their continued growth and the development of a fourth IDPI business line, the evaluation of existing instruction.

Project Goal

This project's goal is to assist IDPI to increase effectiveness, consistency, and efficiency by preparing a single, scalable, and modular project management planning (PMP) process template for IDPI's use to organize and manage all current and future efforts. The development and adoption of a single PMP process template will promote reliable internal and external processes while increasing unity of effort across all of IDPI's business lines.

Project Scope

The reason for commission of this project is to design a consolidated PMP process template for internal and external use by all of IDPI's business groups. The scope of this task includes the gathering of data to conduct analysis on the current PMP processes being utilized by IDPI, the design and development of a PMP process template, and the acceptance of the PMP process template by IDPI.

Project Objectives

Objective 1 Develop a PMP process template that is accepted and adopted by IDPI as their PMP template for use across each of their major instructional products and emerging instructional evaluation business line.

Objective 2 Develop branches from the base PMP process template that can be applied to IDPI's three instructional solution product line and its new instruction evaluation product line.

Objective 3 Establish open communication channels across all product and business lines allowing for collaboration and common operational principles during PMP process development.

Objective one directly addresses the core issue identified and will establish a clear, concise, and repeatable methodology for the management of projects and tasks for IDPI streamlining their operations and leading to increased effectiveness. Objective two speaks to the fact that IDPI's

business lines, while largely similar, produce different products and, as such, may require steps or procedures unique to each. Front end analysis will be applied to each of the three main and the fourth emerging business lines to ensure that the final PMP process template can be applied to all of IDPI's efforts consistently. Finally, objective three identifies the critical role and need for GMS to maintain operational and strategic lines of communications with IDPI during conduct of the project and development of the final product.

Tasks and Milestones

Each of the three identified objectives are further subdivided into work activities which are later identified in the work break-down structure, Plan, of this report. In order to maintain the project completion tempo required to meet IDPI's requirement for completion within 60-days of initiation of project the following milestones have been identified and their status will be communicated to IDPI stakeholders during scheduled weekly progress reports;

- Milestone 1: Close of the data collection period when all initial interviews, workshops, document collection, and surveys have been satisfactorily completed
- Milestone 2: Submission of draft baseline PMP to IDPI
- Milestone 3: Presentation of the new PMP Process template for final client sign-off
- Milestone 4: Presentation of final project debriefing documentation to include AAR and audit of all project activities

Success Criteria

There are several areas to consider when identifying success criteria with the three most important factors being that the project is completed on time, within budget, and that the final PMP process template both meets IDPI's expectations and, once implemented, performs as required. In order to meet these criteria GMS will design and develop a PMP process which is accepted by IDPI's three instructional product groups and one instructional evaluation group that is scalable, modular, customizable and which can be applied to all IDPI business lines.

Project Resources

The design, development, and production of a PMP process template requires, above all else, a cadre of capable, experienced, and dedicated professionals. While GMS employs such individuals IDPI has also made the following IDPI personnel available to fill critical roles and assist with the project. The list below identifies IDPI personnel and the position they will be assigned (see team organization structure in the Organize Phase section)

Personnel/Staff:

- IDPI Instructional Design Team Specialist - Project Quality Assurance/Quality Control Manager
- IDPI Program Evaluation Analyst - Project Management Analyst
- IDPI Instructional Developer - Project Content Developer
- IDPI Instructional Designer and Developer - Project Instructional Designer
- IDPI Technical writer - Project Technical Writer
- IDPI Educational Project Manager - Project Operations Analyst
- IDPI Assessment Analyst - Project Data Analyst
- IDPI Technology Specialist - Project Information Technology Analyst
- IDPI elearning specialists - Project eCommerce Analyst

While short in duration this project will be material resource intensive during the initial data collection phase. Preparing three workshops, some utilizing MS Teams and the project's Sharepoint Site, preparing a comprehensive survey to define the existing PMP process or processes in place, conducting twelve personal interviews, analyzing all collected data, and the design and development of an acceptable PMP process template will require the following material.

Materials:

- Online resources for supporting instruction and other remote interactions
- Digital cameras and recording devices to record interviews and workshops
- Full access suite of technical resources and tools to create online and technology-supported instruction
- Printing resources to create required paper-based materials, including binding facilities
- Data analysis resources to analyze needs assessment and evaluative data

Funding:

The overall budget for this effort is \$31,600.00

Assumptions and Risks

GMS has identified four operational assumptions and four significant risks to the project.

The four operational assumptions identified include;

- IDPI employees and stakeholders are available to GMS when needed
- Online courses (self-study and instructor-facilitated) have similar timelines and resource requirements and will employ similar PMP templates
- Input from all IDPI stakeholders and groups is critical to ultimate success (of note is the three directors of the three instructional product lines)
- IDPI is proficient at utilizing and estimating communications and technology requirements

The four factors which pose significant risk to timely completion of the project include;

- GMS's PMP process template fails to be accepted across all IDPI instructional and business lines leading to non-acceptance of final product
- IDPI personnel have limited availability for interviews and cannot answer requests for information (RFI) leading to incomplete data gathering, faulty analysis, and flawed design
- Two months is a short amount of time for the development and approval of the PMP process template, routine delays, team member unavailability, and unseen events can result in not competing the template in time
- Changes in market trends or IDPI upper management reassessment of company goals could result in loss of support for the project.

Plan

Introduction : Planning phase is one most important one in project management, because it's the one where all work activities that need to be executed to achieve the goals and objectives of the project are decided and the sequence of their execution determined (Weiss and Wysocki, 1992). The strategy to get there is to break down objectives into simple tasks measurable and easy to execute into a work breakdown structure (WBS), and sequence them to clearly show which precedes which. Finally, place all activities, sequenced on a diagram to show all possible routes to reach to the end of the project.

The Work Breakdown Structure (WBS)

The WBS is an emanation of objectives which are broken down into smaller tasks that are easily executable and for which costs can be easily estimated most of the time from previous experience. Each objective of the project was divided into low-level activities that fulfill four characteristics (Weiss & Weysocki, 1992):

1. status of completion measurable;
2. clearly defined start and end;
3. Execution time and cost easily manageable;
4. assignments manageable, measurable, integrable, and independent.

Any activity that fails to fulfill any of these characteristics has to be broken down until it meets all these 4 requirements. The process is shown on the figure below. The WBS is a productivity tool to make the work more manageable and approachable by the team.

Activity Characteristics Legend: 1-Status/completion measurable; 2-Clear start/end date event; 3-Time/cost easily estimated; 4-Manageable/measurable/integratable/independent

Activity No.	Activity Description	Characteristics			
		1	2	3	4
0.1	Submit request for information to IDPI for documentation of current IDPI PMP processes in use by all business lines.	Y	Y	Y	Y
0.2	Develop survey for initial data collection from IDPI employees.	Y	Y	Y	Y
0.3	Introduce project and IDPI team to MS Sharepoint site				
0.4	Conduct three workshops with required stakeholders to gather data and conduct front-end analysis.	Y	Y	Y	Y
0.5	Conduct eight interviews with IDPI employees who are not in leadership or managerial roles focused on current PMP process in use and IDPI standard operating procedures (SOP).	Y	Y	Y	Y
0.6	Conduct four interviews to identify different timelines, resource needs, objectives, and other unique requirements for each of the four different instructional groups	Y	Y	Y	Y
0.7	Analyze collected resources, interviews, and survey responses to identify gaps, similarities, and differences in IDPI's current PMP approach.	Y	Y	Y	Y
0.8	Write a PMP process template based on analyzed data and prepare for initial IDPI review.	Y	Y	Y	Y
0.9	Submit a baseline draft PMP for approval, set return from client review at 7-days.	Y	Y	Y	Y
0.10	Receive approved draft with client comments and edits.	Y	Y	Y	Y
0.11	Submit and obtain the client signoff on the final PMP baseline.	Y	Y	Y	Y

1.1	Write business group specific PMP process template sections for each business group	Y	Y	Y	Y
1.2	Submit PMP process for IDPI approval within 5-days of client signoff on baseline PMP process template.	Y	Y	Y	Y
1.3	Submit and obtain the client signoff on the final PMP process template with business line specific sections included, within 3 days of draft approval	Y	Y	Y	Y
2.1	From project kick-off through completion conduct weekly project in-process reviews (IPR) with assigned IDPI personnel to ensure adherence to schedule and address obstacles as they are identified.	Y	Y	Y	Y
2.2	From project kick-off through completion conduct weekly stakeholder update brief to relay IPR outcomes, schedule, and status of project work breakdown structure	Y	Y	Y	Y
2.3	Conduct an hour-long (timing can increase on IDPI demand) presentation of the new PMP Process	Y	Y	Y	Y
2.4	Obtain IDPI (client)'s project sign-off	Y	Y	Y	Y
2.5	Conduct a formal debrief with all PMP process participants to produce an after action report and capture lessons learned within 5-days of final product acceptance	Y	Y	Y	Y
2.6	Conduct final audit of the project	Y	Y	Y	Y
2.7	Document all project activities within 5-days of project debrief	Y	Y	Y	Y

The Activity Estimates

After successfully creating manageable activities in the WBS, it becomes easier to estimate, by experience, the time and costs of that activity. It is speculative since any variation can happen to resources but there are other tools that will be described later, that are used to capture these variations and propose the fixes. It will serve as the basis for building the critical path network shown later. In addition to the estimates, the following table adds the sequencing of all tasks to better give a clear and unified view of the project.

Time – **in days**; Start schedule – **Period 1 (each period is 5 days)**

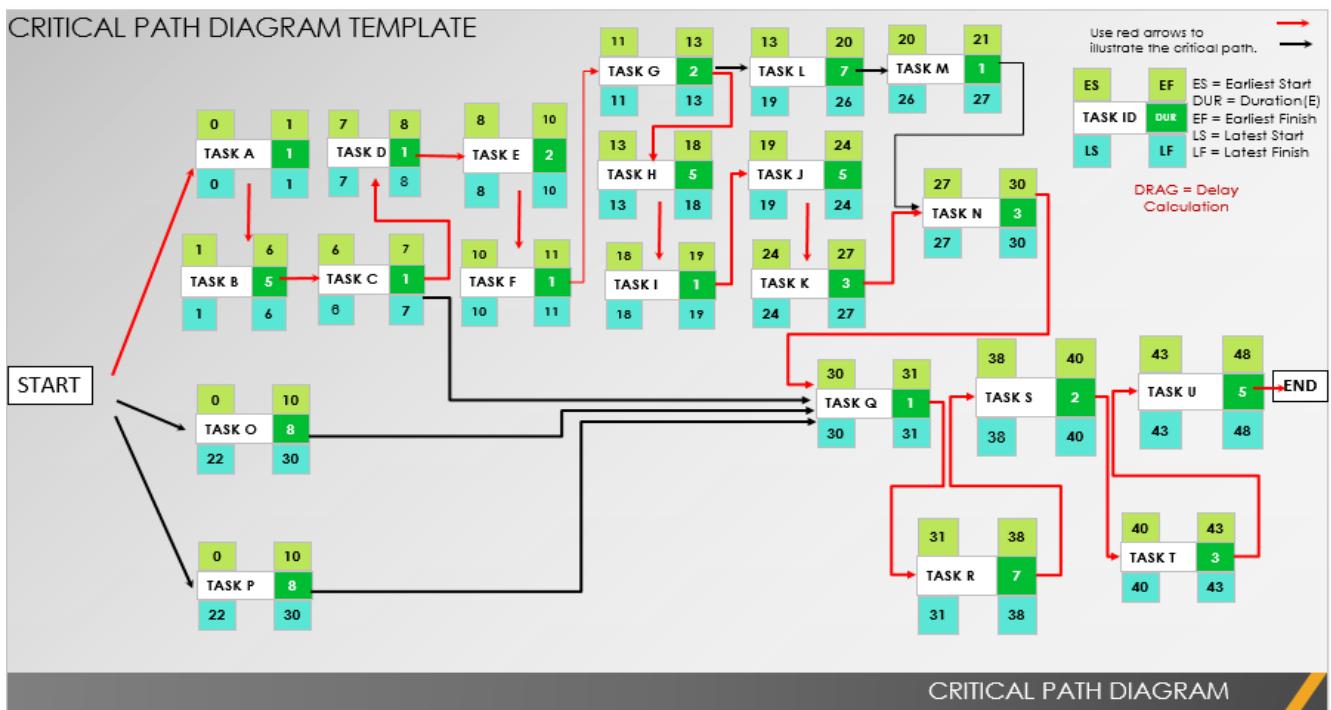
Activity No.	Activity Description	Sequence relationships		Estimated Time / Start	
		before	after	day s	perio d
0.1 (A)	Submit request for information to IDPI for documentation of current IDPI PMP processes in use by all business lines.	0.2(B)	-	1	1
0.2 (B)	Develop survey for initial data collection from IDPI employees.	0.3(C)	0.1(A)	5	1
0.3(C)	Introduce project and IDPI team to MS Sharepoint site	0.4(D), 2.3(Q)	0.2(B)	1	2
0.4(D)	Conduct three workshops using a multimedia material with required stakeholders to gather data and conduct front-end analysis.	0.5(E)	0.3(C)	1	2
0.5(E)	Conduct eight interviews with IDPI employees who are not in leadership or managerial roles focused on current PMP process in use and IDPI standard operating procedures (SOP).	0.6(F)	0.4(D)	2	2

0.6(F)	Conduct four interviews to identify different timelines, resource needs, objectives, and other unique requirements for each of the four different instructional groups	0.7(G)	0.5(E)	1	3
0.7(G)	Analyze collected resources, interviews, and survey responses to identify gaps, similarities, and differences in IDPI's current PMP approach.	0.8(H)	0.6(F)	2	3
0.8(H)	Write a PMP process template based on analyzed data and prepare for initial IDPI review.	0.9(I)	0.7(G)	5	4
0.9(I)	Submit a baseline draft PMP for approval, set return from client review at 5-days.	0.10(J)	0.8(H)	1	4
0.10(J)	Receive approved draft with client comments and edits.	0.11(K)	0.9(I)	5	4
0.11(K)	Submit and obtain the client signoff on the final PMP baseline.	1.3(N)	0.10(J)	3	5
1.1(L)	Write business group specific PMP process template sections for each business group	1.1(M)	0.7(G)	7	4
1.2(M)	Submit PMP process for IDPI approval within 5-days of client signoff on baseline PMP process template.	1.3(N)	1.1(L)	1	4
1.3(N)	Submit and obtain the client signoff on the final PMP process template with business line specific sections included, within 3 days of draft approval	2.3(Q) 0.11(K)	1.2(M) 0.11(K)	3	6
2.1(O)	From project kick-off through completion conduct weekly project in-progress reviews (IPR) with assigned IDPI personnel to ensure adherence to schedule and address obstacles as they are identified	2.3(Q)		8	1
2.2(P)	From project kick-off through completion conduct weekly stakeholder update brief to relay IPR outcomes, schedule, and status of project work breakdown structure	2.3(Q)		8	1
2.3(Q)	Conduct an hour-long (timing can increase on IDPI demand) presentation of the new PMP Process using Multimedia materials	2.4(R) 2.2,(P) 2.1,(O) 1.3,(N) 0.3(C)	2.2,(P) 2.1,(O) 1.3,(N) 0.3(C)	1	6
2.4(R)	Obtain IDPI (client)'s project sign-off	2.5(R)	2.3(Q)	7	6
2.5(S)	Conduct a formal debrief with all PMP process participants to produce an after action report and capture lessons learned within 5-days of final product acceptance	2.6(S)	2.4(R)	2	7
2.6(T)	Conduct final audit of the project	2.7(U)	2.5(S)	3	8
2.7 (U)	Document all project activities within 5-days of project debrief		2.6(U)	5	9

The Critical Path Network

The critical path is the sequence of atomic activities that resulted from the breakdown previously performed, that shows the different routes (connection of activities) from the start to the end of the project. The route that has zero slack time is the critical path. The slack time is the difference between the latest start and earlier start. In some projects, there might be more than one critical path. In our project, there's one critical path that totals 48 days, the exact duration of the project

shown in red on the diagram. Any delay on any task on this route will inevitably create delay in the deliverables of the project.



Critical Path	Duration
A-B-C-D-E-F-G-H-I-J-K-N-Q-R-S-T-U	48 days

The route in red represents the critical path in this diagram and in black are alternative routes. The slack time calculation is not shown on the diagram for the sake of clarity. As expressed earlier, this can be obtained by taking the LS - ES or LF - EF. Every task where this equation gives zero is part of the critical path. It means that there's no room for delay on that task.

The Communication Plan

Communication is as important as any other task in the project plan, as it is impossible to succeed in a project without effective communication between stakeholders. It is therefore important to determine at the beginning of the project the communication channels to be used during the execution of the project. The effectiveness of this resides in choosing the channels where stakeholders are likely to be reached and have them react or provide feedback in a timely manner.

Following is the communication plan for our project :

Stakeholder Name	Method of Communication	Purpose of Communication (why & what)	Team member responsible (or sponsor)	Frequency of Communication (dates)
IDPI President	Stakeholder Update Briefs (in-person or remote).	Progress, issues, and variances	Project Manager	Weekly meetings

IDPI Financial Director	Stakeholder Update Briefs (in-person or remote).	Progress, issues, and variances	Project Manager	Weekly meetings
Facilitated Workshop Director	In-progress reviews, phone calls, email updates	Progress, issues, and variances	Project Management Lead	Weekly in-progress reviews
Facilitated Online Director	In-progress reviews, phone calls, email updates	Progress, issues, and variances	Project Management Lead	Weekly in-progress reviews
Self-Study Online Director	In-progress reviews, phone calls, email updates	Progress, issues, and variances	Project Management Lead	Meetings available on request

GMS will maintain constant contact with IDPI and will communicate through the following channels;

- Request for Information: At the beginning of the project GMS will submit a request for information (RFI) to gather documentation of IDPI's current PMP process and other relevant information to conduct analysis and initiate work. This formalized method will be utilized throughout the project in the event that further detail, elaboration, or additional information is required.
- In Progress Reviews: In progress reviews (IPR) will be conducted weekly between GMS effort leads and identified IDPI personnel. IPRs are designed as a report on progress and allow the opportunity to address scheduling conflicts, identified variances, perceived issues, or any action items to be discussed and resolved or elevated to the Project Manager.
- Stakeholder Update Briefs: Stakeholder update briefs (SUB) are conducted weekly and allow IDPI leadership to monitor the development of the PMP planning template and anticipate completion timeline and readiness for implementation. The Project Manager will conduct these briefings keeping IDPI apprised of progress, informed of issues and variances, and acting as a conduit from IDPI leadership to the project.

The Risk Management Plan

No matter how effective the project plan is, there might emerge some issues that need additional control and can be avoided or resolved as quickly as possible. Therefore, in order to minimize their possible consequences, the visual representation of some issues and the plan on how to resolve them has been prepared.

Issues that may arise	Plan to Resolve
Labor Shortage	Activity Lead will use other available human resources to complete the task within the time limit
Activity Lead unable to manage the task (illness, personal reasons, etc)	Other Leads can take the responsibility to manage the task completion

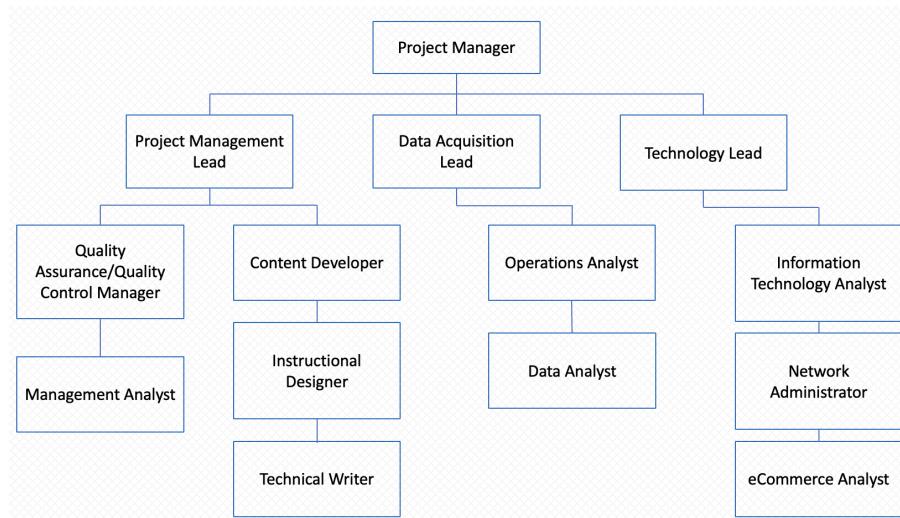
IDPI personnel limited availability for interviews	Exceed the workers included to the interview task in order to meet the limited availability
Change in upper-management	Take additional time to introduce the basics of the project not to exceed the final deadline for delivery
Not fitting in the schedule	Variance report can help to identify the VARs, so Project Manager could resolve the time issues and fit into the final deadline; among possible resolutions can be - providing human resources for earlier task completion in case financial resources let do that.

Organize

Introduction : The blueprints have been produced and made available, it's time to start implementing the project. The Organize phase is part of the implementation, and establishes a clear path on how the resources will be effectively combined and put to work to follow the plan established earlier. This includes building teams, scheduling and assigning responsibilities of tasks execution in forms of work packages. This work serves as a platform for controlling the progress of the project.

Team Organization

Plans are only as effective as the team that is committed to execution is (Weiss & Wysocki, 1992). Plans will not execute themselves without available and good personnel. Good personnel selection starts with hiring the right project manager and later organizing the team around him. In our project, the team selection has started by specifying the structure of the team and establishing the hierarchy. All positions have been created according to the needs expressed in the project specification. The structure is shown on the figure below.



After analyzing the needs, it was determined that 14 positions would be created. The team is under the leadership of the project manager, who is helped by three team leads. Each team member is recruited following specific recruitment criteria. The recruitment table shown below is one of important deliverables in the project to help make good selection of team members and create job descriptions. Following are the recruitment criteria :

Job Title	Criteria
Project Manager	<ul style="list-style-type: none"> ● Bachelor's degree in a business-related field, communication or related field ● 5+ years of experience in project management or related role ● Strong organizational skills to manage and track assigned tasks on multiple projects ● Excellent customer service and interpersonal skills ● Strong analytical and problem solving skills ● Demonstrated attention to detail to make sure key tasks are defined, understood and documented ● Excellent written and verbal communication skills to convey project deliverables, timetables and other information to project team members and stakeholders across Life Storage ● Proficient knowledge of MS Office Suite including SharePoint
Project Management Lead	<ul style="list-style-type: none"> ● Bachelor's degree in a business-related field, communication or related field ● 3+ years of experience in project management or related role ● Strong organizational skills to manage and track assigned tasks on multiple projects ● Certified Project Management Professional ● Strong analytical and problem solving skills ● Demonstrated attention to detail to make sure key tasks are defined, understood and documented ● Excellent written and verbal communication skills to convey project deliverables, timetables and other information to project team members and stakeholders across Life Storage ● Proficient knowledge of MS Office Suite including SharePoint
Data Acquisition Lead	<ul style="list-style-type: none"> ● At least 2 years of work experience with preference for prior work experience on data analysis ● Preference for candidates with solid Powerpoint presentation skills and Excel modeling and background in presenting and visualizing data effectively ● Strong writer and oral communication skills with an emphasis on attention to detail and data accuracy and integrity ● Passionate about media and project management with a constant desire to learn more ● Ability to work in a dynamic environment and collaborate with multiple stakeholders in the organization ● Positive "can do" attitude with a constant drive to iterate and improve. Team player that is eager to chip in during busy periods ● Ability to handle multiple tasks simultaneously and can accommodate last minute change and requests.
Technology Lead	<ul style="list-style-type: none"> ● BS in Information Technology, Computer Science or equivalent is desirable. ● Minimum 3 years of experience working with Microsoft SharePoint and Teams is required. ● Minimum 5 years of experience in building and maintaining a global network infrastructure is required. ● Thorough knowledge of principles and practices of Microsoft Sharepoint Online and Microsoft Teams is required. ● Excellent customer-service skills in a multi-cultural environment is required. ● Advanced knowledge of network architectures, theories, and principles of local and wide area enterprise network design and integration, including topologies and protocols is required.
Quality Assurance / Quality Control Manager	<ul style="list-style-type: none"> ● Minimum of 3 years of experience as a Trainer, Quality Assurance Analyst, or Operational Leader (preferably luxury customer service or retail). ● Advanced computer and presentation skills with an emphasis on PowerPoint and Excel. ● Experience with analyzing data, spotting trends, providing insights, and preparing reports. ● Outstanding organization, prioritization, and time management skills. ● Outstanding verbal and written communication.

	<ul style="list-style-type: none"> Ability to collaborate and communicate in a clear and concise manner at all levels of the organization. Ability to effectively present in person and virtually.
Management Analyst	<ul style="list-style-type: none"> Undergraduate degree in Human Resources, Business or other related discipline Exceptional project management skills; Requires high attention to detail and strong organizational skills Excellent written, oral and positive influential interpersonal skills required Proficient in Microsoft Office with solid Excel and PowerPoint skills Appetite for continuous improvement, and preparedness to think about new approaches and solutions to learning - ability to think creatively
Content Developer	<ul style="list-style-type: none"> Excellent verbal and written communication skills. Ability to manage multiple tasks simultaneously, quickly, and accurately shifting attention between tasks. Design skills with various software programs and understanding of multimedia training platforms and methods. Ability to evaluate learning solutions and incorporate new, innovative approaches to advance learning effectiveness. Ability to create and update innovative and effective eLearning curriculum content. Extremely proficient with Microsoft Office Suite and related program software.
Instructional Designer	<ul style="list-style-type: none"> Minimum of 3 years of experience as an Instructional Designer or similar role. Instructional Design experience with computer software, SaaS systems. Ability to write effective copy, instructional text, audio, and video scripts. In-depth knowledge of learning theories and instructional design models. Lesson and curriculum planning skills. Experience with e-learning certification programs is a plus. Bachelor's degree in Instructional Design/Educational Technology or similar relevant field. Proficient using eLearning software. Comfortable in a collaborative work environment, building strong and effective lines of communication with colleagues and subject matter experts. Experience in designing, maintaining, and updating business and technical presentations. Experience in word processing and editing applications.
Technical Writer	<ul style="list-style-type: none"> Bachelor's degree in Instructional Design or related field required Two to three years prior working experience as a technical writer required Excellent written and verbal communication skills Proficient in MS Office products Candidates must possess above average skills in attention to detail, prioritization and organization Ability to develop content related to complex technical topics for all possible audiences
Operations Analyst	<ul style="list-style-type: none"> Undergraduate degree 3 years of Project Management experience; PMP certification preferred Exceptional project management skills; Requires high attention to detail and strong organizational skills Excellent written, oral and positive influential interpersonal skills required Proficient in Microsoft Office, Sharepoint, and Teams
Data Analyst	<ul style="list-style-type: none"> Strong understanding of SQL, data management, and database logic. Strong Excel, modeling skills required; data visualization / programming a strong plus (Tableau/Power BI, VBA, R) Outstanding analytical, problem-solving skills and attention to detail. Excellent writing / communication skills; ability to influence and communicate with various stakeholders.

	<ul style="list-style-type: none"> Ability to produce top quality deliverables, taking full responsibility and ownership; demonstrate proven track record of delivering project and results.
Information Technology Analyst	<ul style="list-style-type: none"> Associate Degree in Information Technology or a related field; and three years of related experience; or a minimum of 5 years' work experience providing IT support Advanced knowledge of Microsoft Office, Outlook, Sharepoint, Teams, Mac OS and Mobile technology Strong writing and verbal communication, organizational, and interpersonal skills Demonstrated ability to work independently and as part of a team Ability to work in a fast paced environment and demonstrate grace under pressure Ability to explain technical concepts in non-technical terms
Network Administrator	<ul style="list-style-type: none"> Responsible for providing consultation, oversight and integration support of existing hardware, software, network configurations and new system initiatives directly to end-users over the phone or at customer sites. Strong Experience with Windows Server / Active Directory and Windows desktop administration in a domain environment Experience Providing End-User support Able to work closely with Engineers Able to self-manage deadlines, SLAs and service quality Able to learn new technologies quickly
eCommerce Analyst	<ul style="list-style-type: none"> 3 Years of experience with E-Commerce Displaying detail-oriented and consumer-centric approach Excellent organizational and time management skills Good communication skills Problem solving ability Proficiency in Microsoft Office Tools to include Sharepoint and Teams

Work Schedules and Assignments

Work scheduling includes regrouping continuous tasks under one logical and basic unit called work package and assigning them to a united leadership. The criteria for grouping can include continuity of execution of tasks, use of common resources or logical flow under one person supervision. This facilitates the assignment of the project work under the leadership of one person called package manager as contract. Successful work packages are clearly defined with a beginning and end, and its completion easily measurable.

Work Package	WBS Tasks#	Personnel	Skills	TIMELINE PERIODS									
				1	2	3	4	5	6	7	8	9	10
1. Develop Data Collection Tool													
Submit request for information to IDPI	0.1 (A)	Instruction Designer	Instruction Design, Project Management										
Develop survey for initial data collection	0.2 (B)	Instruction Designer	Instruction Design, Project Management										
2. Data Collection													
Introduce project and IDPI team to MS Sharepoint site	0.3(C)	Technology Lead	Data Acquisition lead, Management Analyst, Operation Analyst, Technology Lead										
Conduct three workshops using a multimedia material with required stakeholders to gather data and conduct front-end analysis.	0.4(D)	Technology Lead	Data Acquisition lead, Management Analyst, Operation Analyst, Technology Lead										
Conduct eight interviews with IDPI employees	0.5(E)	Data Acquisition Lead	Data Acquisition lead, Management Analyst, Operation Analyst, Technology Lead										
Conduct four interviews to identify different timelines, resource needs, objectives, and other unique requirements for each of the four different instructional groups	0.6(F)	Data Acquisition Lead	Data Acquisition lead, Management Analyst, Operation Analyst, Technology Lead										
3. Data Analysis													
Analyze collected resources, interviews, and survey responses	0.7(G)	Data Acquisition Lead	Data Acquisition Lead, Instructional Designer										

4. PMP Edition and documentation													
Write a PMP process template based on analyzed data and prepare for initial IDPI review.	0.8(H)	Project Management Lead	Project Manager, Project Management Lead, Content Developer, Instruction Designer, Technical Writer, Quality Assurance, Management Analyst										
Write business group specific PMP process template sections for each business group	1.1(L)	Project Management Lead	Project Manager, Project Management Lead, Content Developer, Instruction Designer, Technical Writer, Quality Assurance, Management Analyst										
Document all project activities within 5-days of project debrief	2.7 (U)	Project Management Lead	Project Manager, Project Management Lead, Content Developer, Instruction Designer, Technical Writer, Quality Assurance, Management Analyst										
5. PMP Feedback Management													
Submit a baseline draft PMP for approval, set return from client review at 5-days.	0.9(I)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
Receive approved draft with client comments and edits	0.10(J)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
Submit and obtain the client signoff on the final PMP baseline.	0.11(K)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
Submit PMP process for IDPI approval within 5-days of client signoff on baseline PMP process template.	1.2(M)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
Submit and obtain the client signoff on the final PMP process template with business line specific sections included, within 3 days of draft approval	1.3(N)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
Conduct a formal debrief with all PMP process participants to produce an after action report and capture lessons learned within 5-days of final product acceptance	2.5(S)	Project Manager	Project Manager, Project Management lead, Quality Assurance Manager, Content Developer										
6. Meeting Reviews													
Weekly project in-progress reviews (IPR)	2.1(O)	Project Manager	Project Manager, Project Management Lead										
Weekly stakeholder update brief	2.2(P)	Project Manager	Project Manager, Project Management Lead										
7. Sign off Activities													
Conduct an hour-long (timing can increase on IDPI demand) presentation of the new PMP Process using Multimedia materials	2.3(Q)	Project Manager	Project Manager										
Obtain IDPI (client)'s project sign-off	2.4(R)	Project Manager	Project Manager										
8. Audit													
Conduct final audit of the project	2.6(T)	Quality Assurance/Quality Control	Project Manager, Project Management Lead, Quality Assurance/Quality Control Manager										

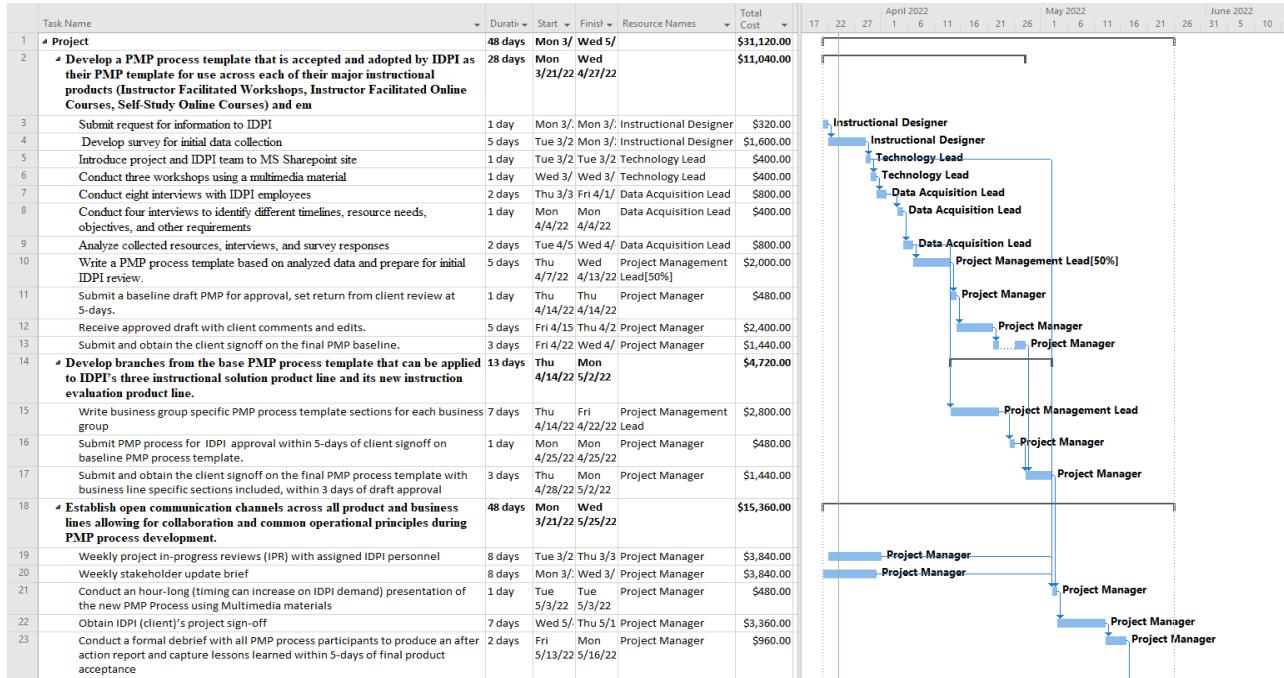
Control

Introduction : Even if planning was accurate, it does not say that there will not be changes along the project, as some things just cannot be predicted. The best way to reach those changes is to act as early as possible by creating the appropriate action plan and follow the corrective actions to keep the project within the time frame, budget and according to its specification. All of the above is the reason for having a control phase in a project, and the tools used for this phase of the project are Gantt Chart, Project Variance Report and Schedule resolution.

Gantt Chart

This chart is a primary tool for this project that represents the periodic reporting system and identifies the status of every project's activity. Visual representations like Gantt Charts help to stay on track during the project and check the deadlines to control the time spent on each activity. It gives information on the goal, objectives and tasks of the project, illustrates the relationships between all the activities, the start and end dates, recurrence of the task, responsible lead for

every task and completion status. All of this information helps to manage the project parts easier and notice the variances for further correction. The part of the chart is presented below.



Project Variance Report

This tool helps to provide information for management decision making in a concise format to take corrective actions. When a variance from the plan takes place, it is important to decide if the corrective action is required and act accordingly. The main purpose of the Variance report is to determine if the project is following the plan or falls behind the schedule. The Variance report includes the planned and actual cost and time spent on each activity, and the variance between them, as well as the person responsible for each activity. It may resemble the Gantt Chart as some of the information (for example, activities, leads, the start and end dates) repeats, but the purpose of these two tools is different. While Gantt chart informs of the activities and dates, the Variance report is mostly used during the project to identify the differences between the plan and actual performance.

Current Version does not contain the Actual Cost/VAR as it is just a draft for a project that has not been started yet. Once it launches, all the empty pieces of the table can be updated using MS Project Tool.

	Task Name	Duration	Start	Finish	Resource Names	Total Cost	Actual	Variance	Work	Actual Work	Duration Variance	Predecessors
1	Project	48 days	Mon 3/1	Wed 5/2		\$32,200.00	\$0.00	\$32,200.00	586 hrs	0 hrs	48 days	
2	▪ Develop a PMP process template that is accepted and adopted by IDPI as their PMP template for use across each of their major instructional products (Instructor Facilitated Workshops, Instructor Facilitated Online Courses, Self-Study Online Courses) and em	28 days	Mon 3/21/22	Wed 4/27/22		\$11,040.00	\$0.00	\$11,040.00	216 hrs	0 hrs	28 days	
3	Submit request for information to IDPI	1 day	Mon 3/1	Mon 3/2	Instructional Designer	\$320.00	\$0.00	\$320.00	8 hrs	0 hrs	1 day	
4	Develop survey for initial data collection	5 days	Tue 3/2	Mon 3/2	Instructional Designer	\$1,600.00	\$0.00	\$1,600.00	40 hrs	0 hrs	5 days	3
5	Introduce project and IDPI team to MS Sharepoint site	1 day	Tue 3/2	Tue 3/29	Technology Lead	\$400.00	\$0.00	\$400.00	8 hrs	0 hrs	1 day	4
6	Conduct three workshops using a multimedia material	1 day	Wed 3/3	Wed 3/3	Technology Lead	\$400.00	\$0.00	\$400.00	8 hrs	0 hrs	1 day	5
7	Conduct eight interviews with IDPI employees	2 days	Thu 3/3	Fri 4/1/2	Data Acquisition Lead	\$800.00	\$0.00	\$800.00	16 hrs	0 hrs	2 days	6
8	Conduct four interviews to identify different timelines, resource needs, objectives, and other requirements	1 day	Mon 4/4/22	Mon 4/4/22	Data Acquisition Lead	\$400.00	\$0.00	\$400.00	8 hrs	0 hrs	1 day	7
9	Analyze collected resources, interviews, and survey responses	2 days	Tue 4/5	Wed 4/6	Data Acquisition Lead	\$800.00	\$0.00	\$800.00	16 hrs	0 hrs	2 days	8
10	Write a PMP process template based on analyzed data and prepare for initial IDPI review.	5 days	Thu 4/7	Wed 4/1	Project Management Lead	\$2,000.00	\$0.00	\$2,000.00	40 hrs	0 hrs	5 days	9
11	Submit a baseline draft PMP for approval, set return from client review at 5-days.	1 day	Thu 4/1	Thu 4/14	Project Manager	\$480.00	\$0.00	\$480.00	8 hrs	0 hrs	1 day	10
12	Receive approved draft with client comments and edits.	5 days	Fri 4/15	Thu 4/21	Project Manager	\$2,400.00	\$0.00	\$2,400.00	40 hrs	0 hrs	5 days	11
13	Submit and obtain the client signoff on the final PMP baseline.	3 days	Fri 4/22	Wed 4/2	Project Manager	\$1,440.00	\$0.00	\$1,440.00	24 hrs	0 hrs	3 days	12
14	▪ Develop branches from the base PMP process template that can be applied to IDPI's three instructional solution product line and its new instruction evaluation product line.	13 days	Thu 4/14/22	Mon 5/2/22		\$4,720.00	\$0.00	\$4,720.00	88 hrs	0 hrs	13 days	
15	Write business group specific PMP process template sections for each business group	7 days	Thu 4/1	Fri 4/22	Project Management Lead	\$2,800.00	\$0.00	\$2,800.00	56 hrs	0 hrs	7 days	9
16	Submit PMP process for IDPI approval within 5-days of client signoff on baseline PMP process template.	1 day	Mon 4/25/22	Mon 4/25/22	Project Manager	\$480.00	\$0.00	\$480.00	8 hrs	0 hrs	1 day	15
17	Submit and obtain the client signoff on the final PMP process template with business line specific sections included, within 3 days of draft approval	3 days	Thu 4/28/22	Mon 5/2/22	Project Manager	\$1,440.00	\$0.00	\$1,440.00	24 hrs	0 hrs	3 days	16,13
18	▪ Establish open communication channels across all product and business lines allowing for collaboration and common operational principles during PMP process development.	48 days	Mon 3/21/22	Wed 5/25/22		\$16,440.00	\$0.00	\$16,440.00	282 hrs	0 hrs	48 days	
19	Weekly project in-progress reviews (IPR) with assigned IDPI personnel	8 days	Mon 3/1	Wed 3/3	Project Manager	\$3,840.00	\$0.00	\$3,840.00	64 hrs	0 hrs	8 days	
20	Weekly stakeholder update brief	8 days	Mon 3/1	Wed 3/3	Project Manager	\$3,840.00	\$0.00	\$3,840.00	64 hrs	0 hrs	8 days	
21	Conduct an hour-long (timing can increase on IDPI demand) presentation of the new PMP Process using Multimedia materials	1 day	Tue 5/3/22	Tue 5/3/22	Project Manager	\$480.00	\$0.00	\$480.00	8 hrs	0 hrs	1 day	20,19,17,5
22	Obtain IDPI (client)'s project sign-off	7 days	Wed 5/5/22	Thu 5/12	Project Manager	\$3,360.00	\$0.00	\$3,360.00	56 hrs	0 hrs	7 days	21
23	Conduct a formal debrief with all PMP process participants to produce an after action report and capture lessons learned within 5-days of final product acceptance	2 days	Fri 5/13/22	Mon 5/16/22	Project Manager	\$960.00	\$0.00	\$960.00	16 hrs	0 hrs	2 days	22
24	Conduct final audit of the project	3 days	Tue 5/15/22	Thu 5/19	QA/QC	\$960.00	\$0.00	\$960.00	24 hrs	0 hrs	3 days	23
25	Document all project activities within 5-days of project debrief	5 days	Fri 5/20/22	Thu 5/26	Project Manager[125%]	\$3,000.00	\$0.00	\$3,000.00	50 hrs	0 hrs	5 days	24

Schedule Resolution

Project manager together with Project Management Lead serve as a source of managing the schedule in case it got affected by some changes. In order to notice the lags or outrunning in the schedule, project managers will be meeting with the team weekly to discuss the progress and fill in the variance report. Each team lead (Project Management Lead, Data Acquisition Lead, Technology Lead) are responsible to meet the schedule requirements, within budget, and required specification in their teams and take actions concurrent with the Project Manager. The communication plan serves to establish the connections between all the team leads in order to act on the changes and resolve the schedule if it got affected.

Close

Introduction: The Close Phase ensures an orderly end to the project by establishing procedural control of the redistribution and reallocation of personnel and resources, the capture and archival of relevant project documentation, and the timely dispatch of final deliverables to the client. It includes a post-project audit and a final project report.

Project Termination Procedures

This project is scheduled to initiate termination upon IDPI's acceptance of the final PMP process template and confirmation, in writing, to GMS that they are satisfied with the product. GMS's Project Management Lead will then transition to the termination manager responsible to ensure that all close activities are completed and all final deliverables produced and received by IDPI.

Once the final PMP process template has been accepted an initial project termination meeting will be conducted to begin project close procedures and identify required actions. This is a critical step in the management of the project and care must be taken not to lose sight of required tasks which include; preparation of project team member's performance evaluation reports (to include memorandums written to IDPI leadership informing them of IDPI team member's

contributions and efforts), the capture, consolidation, and organization of all reports, data, and files used in support of the project, the review of all financial documentation to ensure commitments are met prior to project close, and the termination of any outstanding arrangements or obligations no longer required to complete the project.

As the project closes it will become necessary to release IDPI personnel who supported the effort and return all IDPI resources used throughout the project. Prior to final release of IDPI personnel a formal after action review (AAR), debriefings, and exit interviews will be conducted to ensure that lessons learned, new procedures, and best practices are captured and documented for the benefit of both GMS and IDPI. The AAR will cover all five phases of the project (Define, Plan, Organize, Control and Close) as well as operational, administrative, and logistical matters. These actions will result in the publication of an after action review and continuous improvement (AAR/CI) report which will include a section specifically focused on the introduction and use of Microsoft Sharepoint and Microsoft Teams during both project execution and during final product introduction.

The AAR process will be followed by the publication of the project's deliverable of a PMP process template. The publication of the template will include ten hardbound physical copies (two for each business group and two complete with all associated documentation for IDPI leadership) and four fully interactive digital copies for use and dissemination throughout IDPI's staff. Once IDPI has accepted the final publication of the PMP process template GMS will produce a post-project Audit Report and project Final Report.

Post project Audit Report

Upon receipt of signed verification of IDPI acceptance of the final product GMS will conduct a full audit of the project to include the following sections;

- Review and contrast of project's plan and actual execution to include the project's goal, objectives, slack discovered in schedule, and
- An accounting of any missed timelines or submitted change orders.
- A copy of the project's final Variance Report
- Full reconciliation of project schedule and budget
- Comparison of Project Goal and initial project specifications with final product
- IDPI feedback surveys to include satisfaction with GMS conduct, execution of project, and final product

IDPI will be provided with a digital copy of the post product Audit Report to review and archive for later reference. Portions of the post product Audit Report will be utilized in producing the project's Final Report.

Category	Item	Yes	Partial	No	Notes (Required for Partial or No)
Goal	GMS produced a (PMP) process template that can be used to increase effectiveness, consistency, and efficiency				
Goal	The PMP process template is scalable				
Goal	The PMP process template is modular				
Goal	IDPI will implement the PMP process template to both internal and external processes				
Objective 1	GMS developed a PMP process template for use by IDPI				
Objective 2	The final PMP Process Template is fully applicable to IDPI's Instructor Facilitated Workshops				
Objective 2	The final PMP Process Template is fully applicable to IDPI's Instructor Facilitated Online Training				
Objective 2	applicable to IDPI's Self Study Online Training				
Objective 2	The final PMP Process Template is fully applicable to IDPI's Evaluation of Existing Instruction				
Objective 3	GMS maintained communications with IDPI				
Objective 3	The weekly IPRs were relevant and helpful to project completion				
Objective 3	were relevant and helpful to project completion				
Success Criteria	The project was completed on time				
Success Criteria	The project was completed within the projected budget				
Success Criteria	The PMP process template meet IDPI's expectations				

Sample image of IDPI project satisfaction and feedback survey

Final Project Report

The final act of the project is the production of a project Final Report produced to document the project from planning through proposal and to close. The project Final Report is written by GMS and accepted by IDPI, acceptance of the Final Report formally ends the project. GMS will utilize the post-project Audit Report and all other applicable project documentation to produce the final report, the project's final report will, at a minimum, include;

- IDPI's overall impressions on the performance of GMS during the project and satisfaction with the final product
- The capture and archival of organizational and administrative steps and innovations and techniques developed in support of the project
- A copy of the AAR/CI report produced by the project termination management team
- Microsoft Teams and Sharepoint lessons learned and recommended standard operating procedures for future utilization

Upon receipt and acceptance of the project's Final Report the project will officially be closed. GMS thanks you for the opportunity to help IDPI achieve its goals and looks forward to future joint endeavors.

Report References

Weiss, J. W., & Wysocki, R. K. (1992). 5-Phase project management: a practical planning & implementation guide. Reading, Ma: Addison-Wesley.

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