POPULATION HEALTH PARTNERS

PROJECT MANAGEMENT MASTERY

LEADING A PROJECT PLANNING WORKSHOP

A HANDBOOK FOR WALL-BASED PROCESSING

DRAFT d.001

Projects at Population Health Partners

are collaborative initiatives that produce results that matter to our portfolio companies and ourselves. Through the discipline of project management, we balance the constraints of work specification (what we deliver), time, cost and risk to create a measurable product, service or result. Projects are aligned to the goals of the portfolio companies and our organization. Teams and individuals are aligned to projects. All projects have a plan and a reporting dashboard.

1.0 Initiate the project
1.1 Review the project proposal
1.2 Validate proposed objectives

2.0 Define and organize the project
2.1 Establish the project organization
2.2 Define the project parameters
2.3 Integrate project scope *(if part of a program)*
2.4 Define the project infrastructure

3.0 Plan the project
3.1 Develop the Work Breakdown Structure (WBS)
3.2 Develop the preliminary schedule
3.3 Integrate project schedule with program schedule *(if part of a program)*
3.4 Refine estimates and finalize resource commitments
3.5 Optimize the project plan
3.6 Develop risk management plans
3.7 Transition from planning to managing

4.0 Track and manage the project
4.1 Manage the project plan
4.2 Manage issues, changes and risks
4.2 Manage the communication processes

5.0 Close out the project
5.1 Complete the transition activities
5.2 Conduct project close-out reviews
5.3 Complete administrative close-out

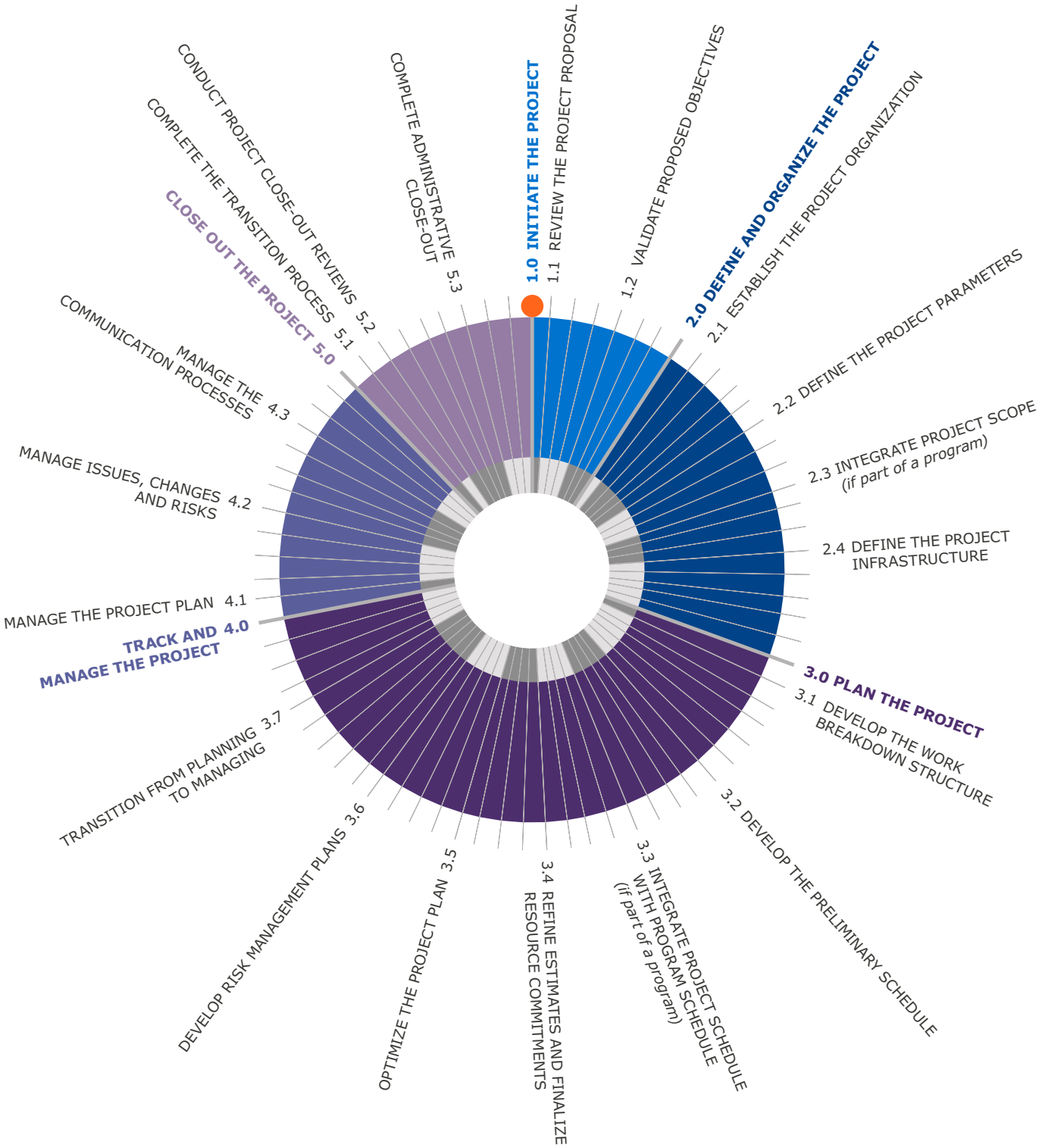

1.0 INITIATE THE PROJECT
1.1 REVIEW THE PROJECT PROPOSAL
1.2 VALIDATE PROPOSED OBJECTIVES
2.0 DEFINE AND ORGANIZE THE PROJECT
2.1 ESTABLISH THE PROJECT ORGANIZATION
2.2 DEFINE THE PROJECT PARAMETERS
2.3 INTEGRATE PROJECT SCOPE (if part of a program)
2.4 DEFINE THE PROJECT INFRASTRUCTURE
3.0 PLAN THE PROJECT
3.1 DEVELOP THE WORK BREAKDOWN STRUCTURE
3.2 DEVELOP THE PRELIMINARY SCHEDULE
3.3 INTEGRATE PROJECT SCHEDULE WITH PROGRAM SCHEDULE (if part of a program)
3.4 REFINE ESTIMATES AND FINALIZE RESOURCE COMMITMENTS
3.5 OPTIMIZE THE PROJECT PLAN
3.6 DEVELOP RISK MANAGEMENT PLANS
3.7 TRANSITION FROM PLANNING TO MANAGING
TRACK AND MANAGE THE PROJECT 4.0
4.1 MANAGE THE PROJECT PLAN
4.2 MANAGE ISSUES, CHANGES AND RISKS
4.3 MANAGE THE COMMUNICATION PROCESSES
CLOSE OUT THE PROJECT 5.0
5.1 COMPLETE THE TRANSITION PROCESS
5.2 CONDUCT PROJECT CLOSE-OUT REVIEWS
5.3 COMPLETE ADMINISTRATIVE CLOSE-OUT

Table of contents

Leading a Project Planning Workshop: How to use this handbook 6
What is Wall-Based-Processing? 7

Why & what

Steeping & Immersion 8
Project Objective Statement 9
Success Criteria 11
Flexibility Matrix 12
Other Project Parameters 13
Major Deliverables 15

How, who & when

Project Roles and Team Roster 17
Work Breakdown Structure 20
Logical Dependency Mapping & Preliminary Schedule 23

Issues & risks

Risk Assessment Matrix 26
Risk Management Plans 29

Tools & methods

Gallery Walks 31
Dashboards 32
Task Status 33
Issue Logs 34

Definitions

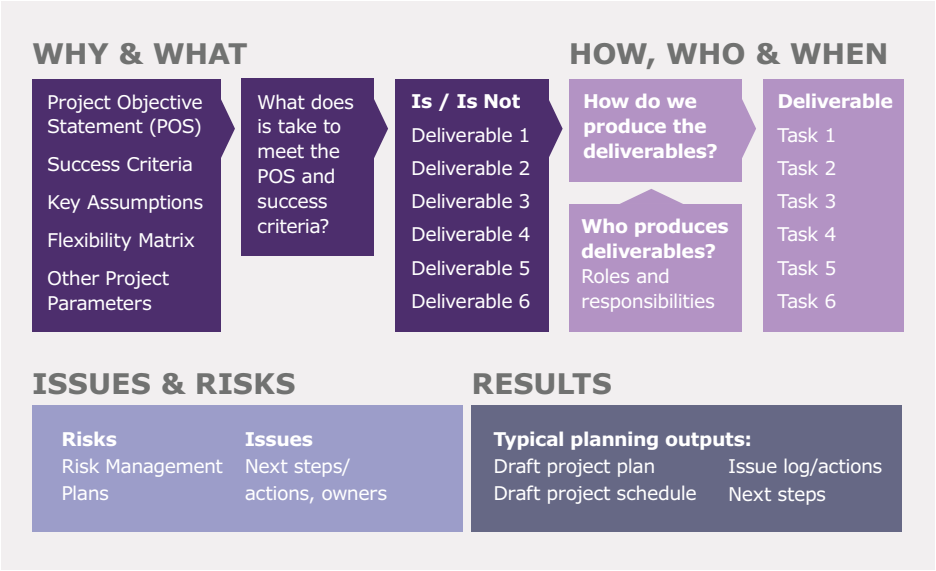
Critical definitions used in this handbook 35

Leading a project planning workshop

Project leadership requires bringing global teams of cross disciplinary associates together and utilizing a disciplined methodology for translating our strategy into execution. This process, traditionally referred to as "project management" is not a magical art, nor a box checking exercise done with scheduling software. Project leadership at Population Health Partners is a methodology and a set of languages we use to consistently, reliably and predictably align the work we do with our strategy.

All project leadership begins with a well facilitated, in-person project planning workshop. This workshop is held in a project studio or large space, all project team members are present, and everyone has access to a set of simple and collaborative resources listed throughout this handbook.

This handbook codifies PHP's ways of working for all project leaders and teams as they plan their work together. This methodology is a requirement for the prioritization and resourcing all project-based work at PHP.



The typical flow for a project planning workshop focuses on "Why & What, How, Who & When" as well as "Issues, Risks and Results" of our work.

This handbook does not attempt to define or explain project management in detail or totality. It is limited to the facilitation of a project planning workshop. For further information, please see PHP's Project Management Mastery Guide.

What is wall-based processing?

This handbook utilizes a process called, "Wall-based processing (WBP)", which requires project teams to spend several days together working with large expanses of wall or easel space to literally map, draw, and Post-it note their way into a plan before a single bit of project work begins. If members are remote, the collaboration tool Mural could be used.]"

Wall-based processing takes space, participation, and iteration.

It is often messy, extremely detailed, and challenging.

But, it always produces a better project plan and a team ready to do the work.

Why & what

Steeping and immersion

Purpose

All projects should begin with the team building a common understanding of what needs to be done, why, by who, and when. This early project orientation occurs as a conversation among all of the project team members and is moderated by the project leader. The intent of the steeping process is not to be comprehensive, to plan, or seek answers too early. Rather, the intent is to level set, clarify, share information and align the entire team to the purpose of the work at hand.

Description

Good questions to begin team steeping:

- What is the business need for this project?
- Who is the project sponsor?
- What tangible result, product or service do we intend to produce?
- Why does this matter?
- Why and how was this team selected?
- Is there any available data or information helpful in understanding the project parameters?
- What are the known project requirements?
- What are the known constraints? e.g. cost, time, people, etc.
- Are there any known risks associated with this project?
  If so, what is our appetite for such risk?
- Does this project link to or relate to any other existing projects?
- Have there been similar projects in the past? Any learnings?
- How might we best describe this conversation?

Method

Group discussion.

Steeping takes the form of a group discussion that is inclusive of the entire project team and moderated by the project leader. Preferably, this conversation takes place in-person and just prior to crafting the Project Objective Statement.

Why & what

Project objective statement

Purpose

A short statement of the project's target scope, schedule and resources. The POS defines the project parameters immediately.

Description

A Project Objective Statement should be...

Concise
- 25 words or less.

Clear
- No ambiguity.
- Precise language.

Complete
- **Scope** - What the project will accomplish.
- **Schedule** - When the project will start and finish.
- **Resources** - How much will be spent (people, money, etc).

- The POS does not state why the project exists.
- The POS provides clarity and focus for the project team.
- The POS defines targets for planning - these are not commitments.
- Use ordinary English (avoid technical jargon, buzzwords or expertise specific phrases)
- The POS should be clear to those not familiar with the project and not require specialized knowledge of the domain.

EXAMPLE

"I believe this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to the earth…$531 million in this fiscal year…"

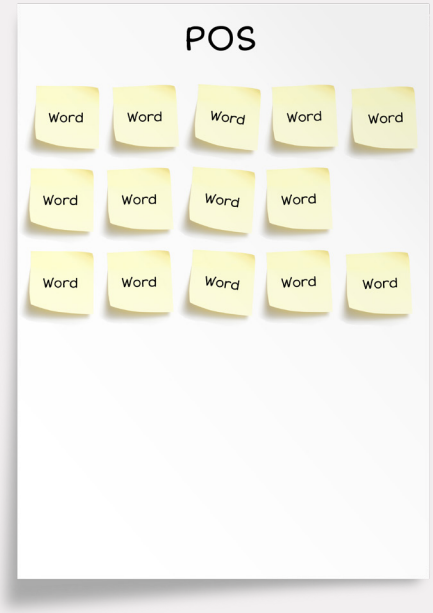
- *John F. Kennedy, May 25, 1961*

or as a POS…

The United States will send a man to the moon and return him safely to the earth by December 31, 1969, at a cost of $10 billion.

Method

Wall-based processing.



Resources

- Ample amounts of flip-chart paper, easels, z-racks, or suitable wall space.
- Ample amounts of single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

Construct a POS of 25 words or less. Include specification of scope, schedule and resources in the POS. Write **one** word per Post-it note.

1. Each team member should write one word per Post-it note that they believe critical to the POS.
2. Write as many words as needed to begin.
3. Do this individually and limit group conversation until all team members have exhausted the words they believe needed.
4. Words should be:
   - **nouns:** *specify the tangible output, product, service or result we intend to deliver, or the resources and schedule required to do so.*
     - *e.g., database, conference, customer, tool, curriculum, 31 December, Q4, cost, budget,10 Million.*
   - **verbs:** *actions we are going to take.*
     - *e.g., build, unearth, reaffirm, validate, construct, deliver, produce*
   - **adjectives or adverbs:** *how we are going to do the work, or qualities of the finished result.*
     - *e.g., accessible, searchable, easy, simple, intuitive, global, slow, fast.*
5. Place words in a semi-organized manor on wall, z-rack or flip chart.
6. The project leader should only remove exact duplicate words.
7. Triage the words: identify similar themes or categories and group the Post-it notes while discussing intent.
8. Make decisions as a group regarding the best and most applicable words.
9. Use a new area of wall or easel and reorder the best words into a POS.
10. Add conjunctions, prepositions, and articles to connect words as needed, but only when the group determines the draft POS is roughly complete. Don't worry about adding these words too early, they are only a finishing touch.
    - *e.g, the, and, a, as, in.*

EXAMPLE

Identify, develop, and implement A, B, and C for market D with functionality E, F, and G using $xxx by month, day, year.

Why & what

Success criteria

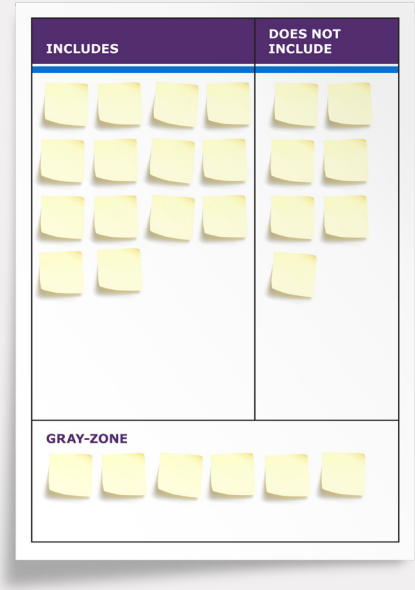
Purpose

Success criteria are used to define successful project completion.

Description

Success criteria should be focused on defining the specific requirements of project success.

- What needs to be included?
- What does not need to be included?



Method

Wall-based processing.

Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

As a group, determine what defines successful project completion.

1. Individually, team members should add Post-it notes that describe what success 'includes' and 'does not include'.
2. Use the "Gray-Zone" for debatable or unknown factors.
3. Limit group conversation until a critical mass has been reached.
4. Remove exact duplicates, seek common groupings, and discuss/clarify/debate as a group.

Why & what

Flexibility matrix

Purpose

The Flexibility Matrix explicitly states the basis for decision making and helps the team determine the trade-off among scope, schedule and resources. When issues or problems are encountered in the project, the team can reference the Flexibility Matrix to prioritize elements that can or cannot be adjusted.

Description

Least flexible is the last element to be exceeded.

Moderately flexible is the element either maximized or minimize.

Most flexible is the element we are most willing to exceed.

- Discuss and clarify with sponsor and key stakeholders.
- May change over the life-cycle of the project and require repeated validation.
- Requires a conscious business decision to make changes.
- Must describe the rationale used to determine why scope, schedule and resources are least, moderate or most flexible.

Method

Wall-based processing.

Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

Working as a group, determine the least, moderate and most flexible elements among scope, schedule and resources.

1. First, determine which element is least flexible and discuss the rational for this selection.
2. Place a Post-it note with rationale in the appropriate box.
3. Determine which element is most flexible and discuss the rational for this selection.
4. Place a Post-it note with rationale in the appropriate box.
5. By default, this leaves the moderately flexible element.
6. Place a Post-it note in the remaining box with rationale.

Why & what

Other project parameters

Purpose

We want to understand more than just technical aspects of the project. Other project parameters are designed to capture these and provide a comprehensive view of the work at hand.

Description

OUTCOMES	• Generated by or derived from the outputs of the project. • The results and affect of successful completion of project. • Can include your success criteria. - e.g., 20% increase in revenue, more repeat customers, etc. ***IMPORTANT!*** ***Outcomes are different than outputs of the project. We are not seeking outputs here.***
KEY BUSINESS DRIVERS	Why are we doing this? e.g., new solution launch, new business unit, change in customer need, economic changes.
KEY ASSUMPTIONS	What do we assume has to happen, be completed, or be delivered by another project, program, team or outside partner for the project to be successful?
RELATED ORGANIZATIONAL INITIATIVES	Connections, if any, to other major initiatives within the organization globally.
ANTICIPATED BENEFITS	• Estimated return on investment • Tangible benefits • Intangible benefits
CRITICAL SUCCESS FACTORS	What factors, people, events, conditions, or other environmental factors have to be present (or true) to ensure successful completion of the project?
LESSONS LEARNED	What have we learned from prior projects that will help us improve now?

Method

Wall-based processing

One flip chart, easel or wall section per project parameter.

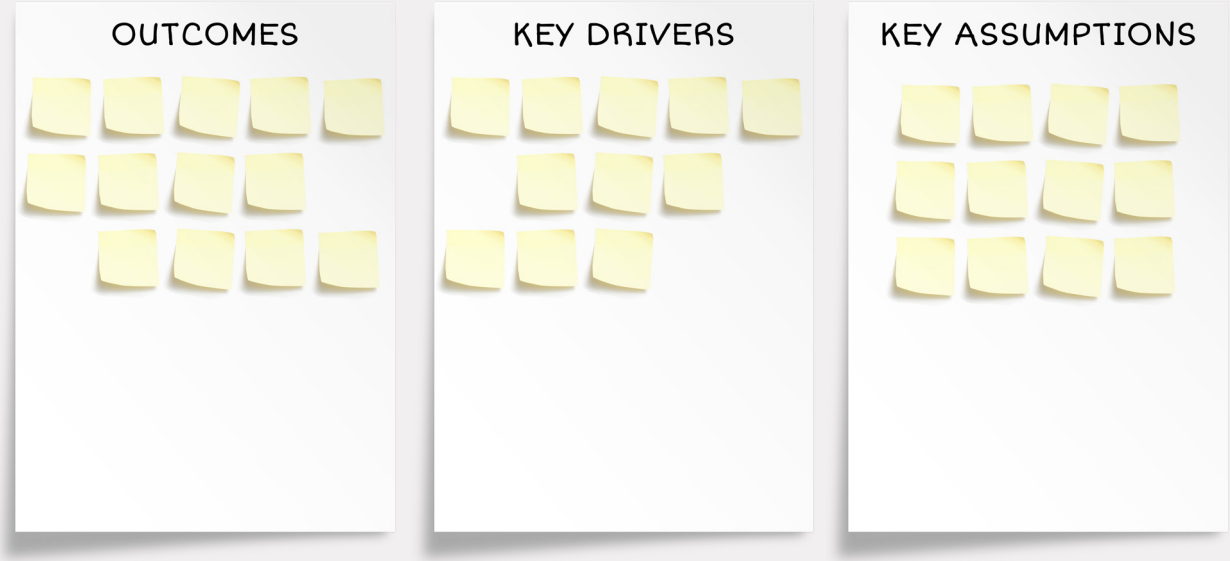
Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

Determine the other project parameters.

1. The project team should divide-up in order to quickly and effectively address each project parameter.
2. Two or more people per parameter (no individuals).
3. Use one Post-it note per item.
4. The entire group should review and discuss each parameter when complete. The authors of each parameter should present their process and outcome briefly.



Why & what

Major deliverables

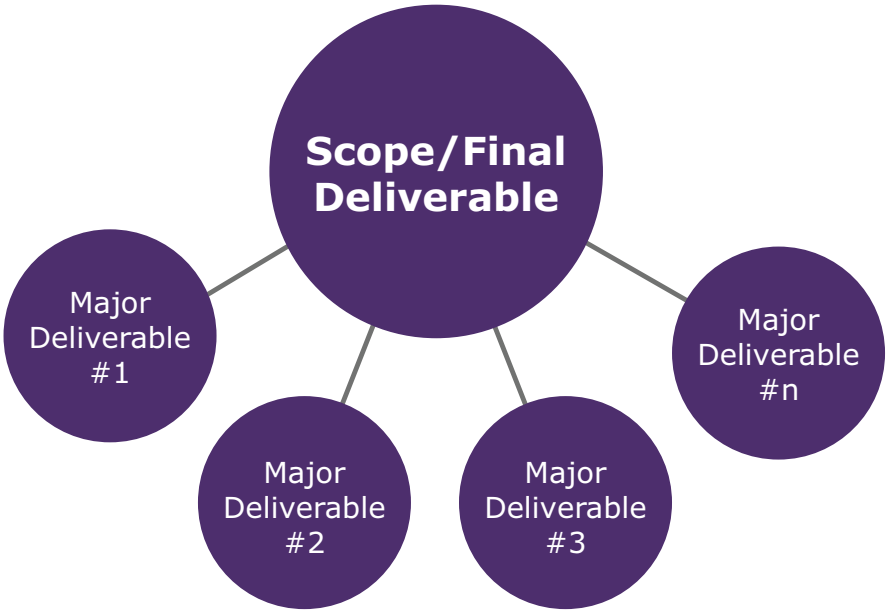
Purpose

The Major Deliverables (MD) of a project are tangible outputs created as a result of the project work.

Description

The Major Deliverables define what the project is expected to produce. A common understanding of major deliverables provides the team with boundaries and serves to reduce unnecessary rework.

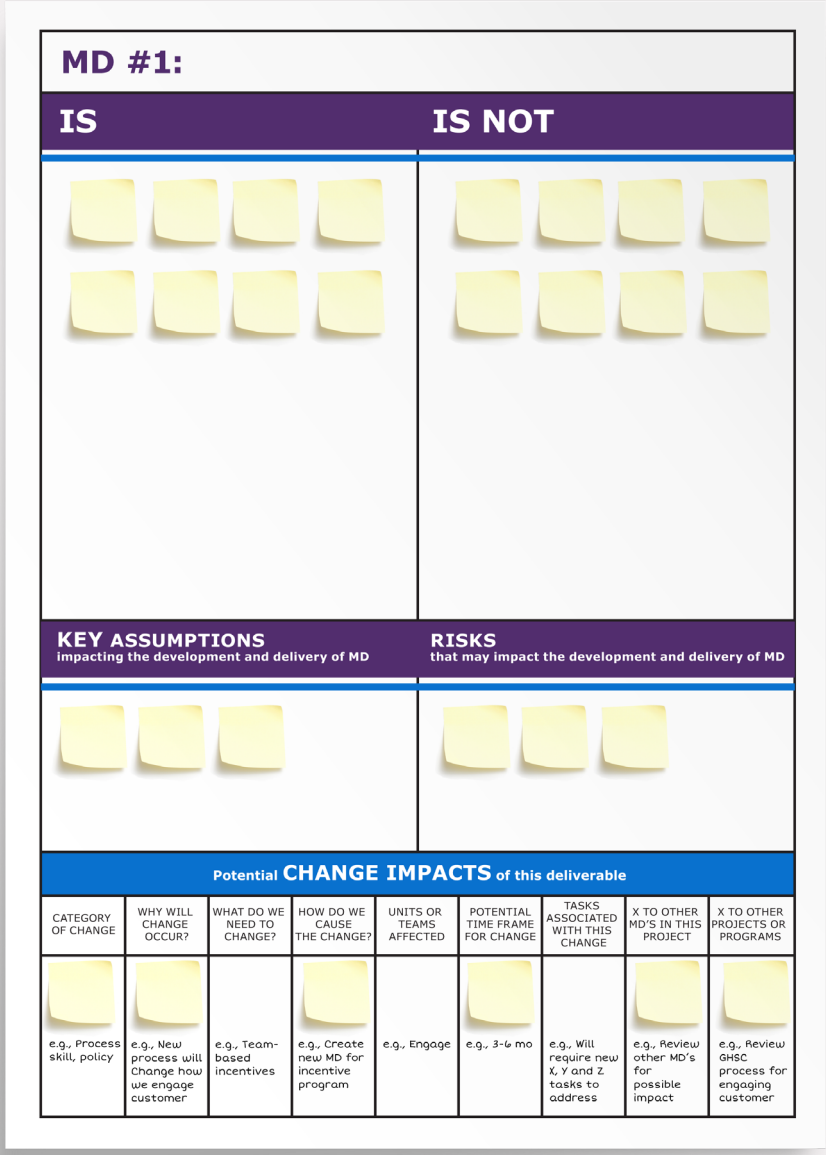
- Identify major, tangible deliverables from the project.
- Typically 3–10 deliverables per project.
- Each MD should be supported by an IS/IS NOT list, key assumptions, risks, and potential for change to the organization.



EXAMPLE

POS: Implement an Lifecycle Contract Management Solution by 09/21/2022 for no more than $1 million.

Deliverables: (1) Vendor selection and outcome, (2) System configuration, (3) Training, Documentation, (4) Technical support process.



Method

Wall-based processing.

Resources

- PHP Major Deliverable Wall-Chart
- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

1. As a group, create a list of all Major Deliverables that deliver the POS.
2. Once the team has determined all of the major deliverables, the team can subdivide and build out each major deliverable.
3. For each MD, create an IS/IS NOT chart.
4. Then, determine any risks, assumptions or potential for change from the MD.
5. Review each completed MD as a group.

How, who & when

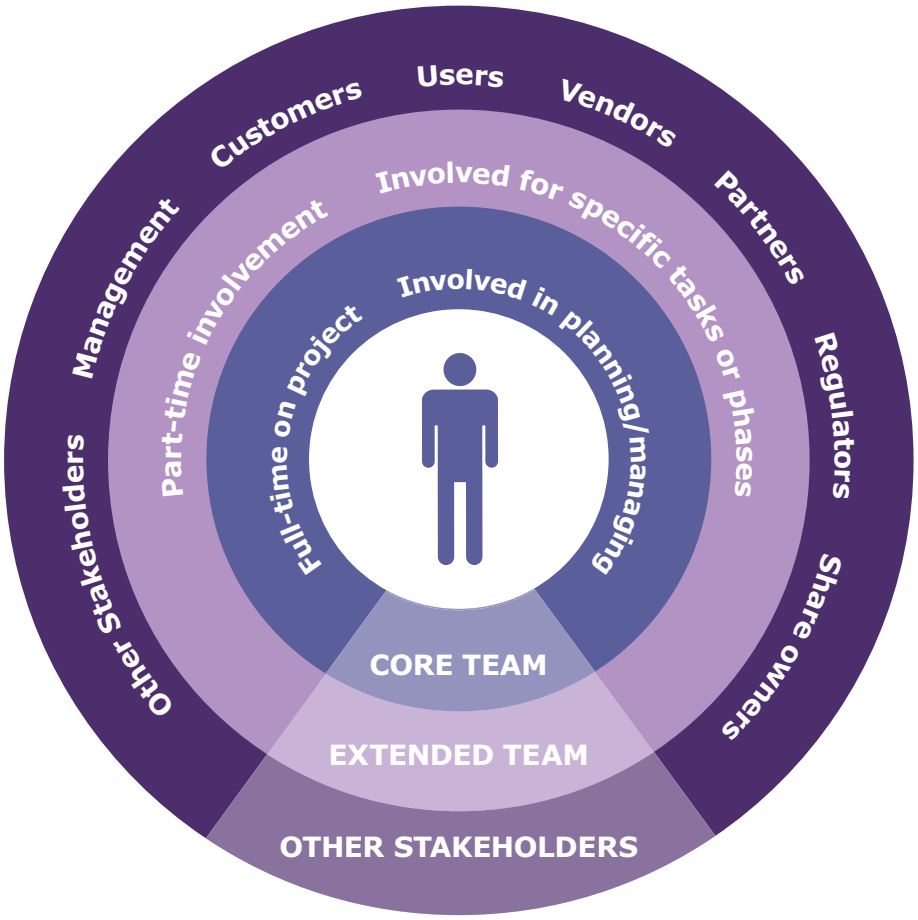
Project roles and team roster

Purpose

Define who will produce the results of our work. Explicit group discussion of project roles and responsibilities clarifies expectations, ensures projects are adequately resourced, avoids duplication of effort, and provides opportunity for individual development.

Description

The project leader is responsible for defining roles and responsibilities with input from the project team. This can be done at any time during the defining and organizing of a project, but may require several revisions until final. Roles and responsibilities should be discussed openly among all team members, and the project leader should seek input regarding individual skills and % of time available. A final project team roster should be made explicit, a social contract agreed upon, and then vetted with the sponsor.



Project roles to define

PROJECT SPONSOR

- Accountable for the business need.
- Determines what groups, teams or organizations need to be involved.
- Authorizes project.
- Appoints PM.
- Authorizes team.
- Protects, mentors, supports team.
- Approves plan.
- Social contract with team.

PROJECT LEADER

- Establishes and leads the project team.
- Responsible for achieving the project objectives.
- Defines the project process.
- Obtains approval from sponsor.
- Assures all team members understand and accept their responsibilities.
- Expends resources according to the plan.
- Analyzes actual performance against plan.
- Assures timely adaptive action is taken.
- Establishes priorities.
- Provides periodic status reports and information.
- Resolves conflicts.
- Tracks issues.
- Updates dashboards.

CORE TEAM

Individuals, representing different project functions, who are responsible for project planning and making project decisions. Typically, the project team is made up of the best ~7 individuals representing one of more of the functions most affected by, or that most affect, the success of the project.

EXTENDED TEAM

Individuals who perform project work or whose expertise may be needed during the life of a project.

PROJECT TEAM OR GROUP

Anyone associated with the project, including the sponsor, project leader, team, extended team and those performing tasks.

TEAM ROSTER

A document formalizing the members of the project team and their contact information. The roster is typically completed by the project leader with input from the team and agreed upon by the sponsor. The roster must provide specification of individual responsibilities, relevant skills of individuals on the project, and the % of time each individual will dedicate to the project. The project leaders should total the % of time dedicated to the project and determine the true number of people working on a project. This summation provides a great gut-check moment for the team regarding adequate resourcing.

Method

Group conversation.

TEAM ROSTER

NAME	GROUP OR TEAM	ROLE ON PROJECT	RESPONSIBILITIES	RELEVANT SKILLS	% AVAILABLE	RELATED PROJECTS	PREFERRED CONTACT

The project leader should propose a draft roster based on their initial knowledge of the project and team. The project leader should then moderate an open and inclusive conversation among all project team members to further refine the roles, responsibilities, relevant skills and time available for the project.

- Seek specificity of each team member. Avoid lofty commitments or generality.
- The project leader should never assume the relevant skills of team members—Ask and discuss as a group.
- The project leader should never assume the % of time available from project team members—Ask and discuss as a group.

How, who & when

Work breakdown structure

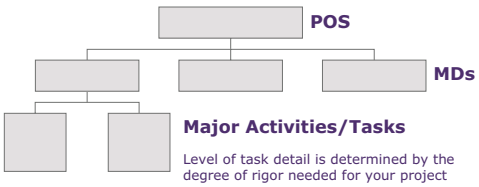
Purpose

A Work Breakdown Structure is a comprehensive, systematic means of defining project work. This process facilitates team understanding of the total effort, as well as each individual's effort, to complete the project.

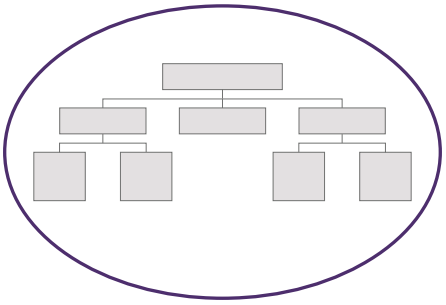
Description

The tasks required to achieve the MDs are identified and organized in a hierarchical format. This forms the basis for understanding all of the work in the project.

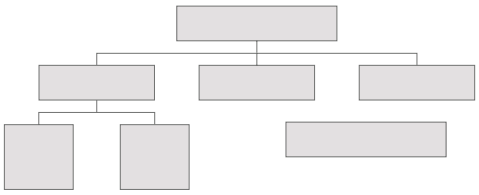
- Tool for identifying project work.
- Hierarchical, logical structure of project work.
- Comprehensive.



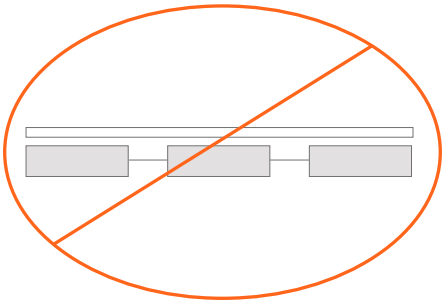
LEVELS



COMPLETENESS



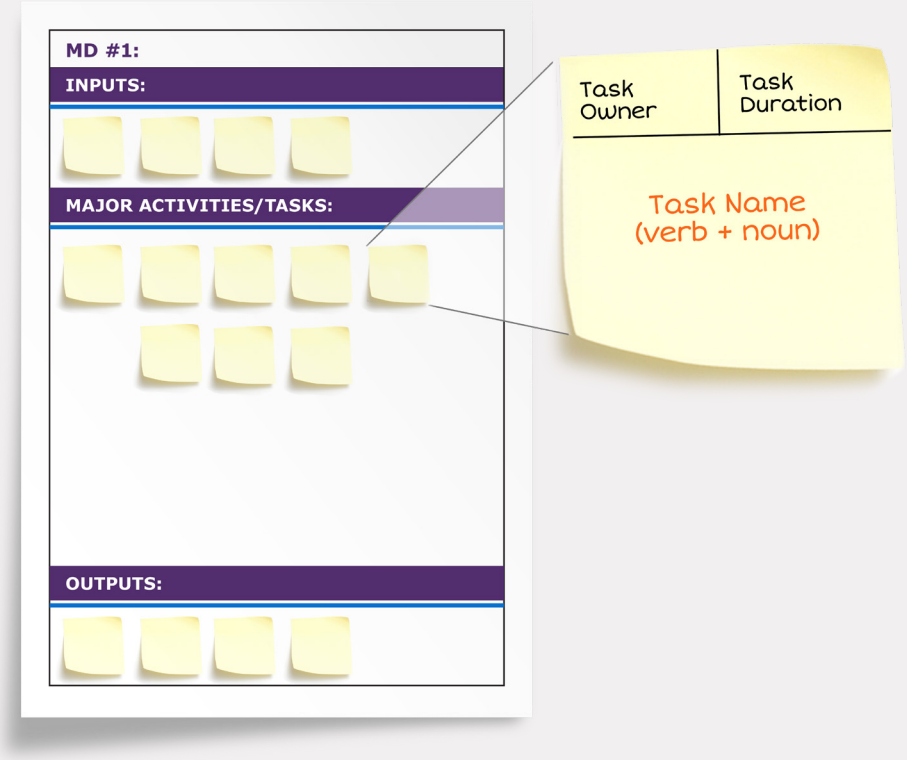
AGGREGATION



NOT SEQUENCE

Method

Wall-based processing.



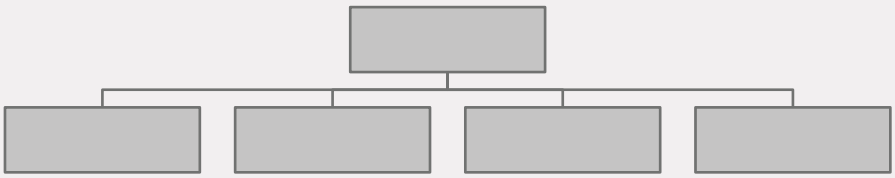
Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Single color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

Identify the INPUTS, OUTPUTS, and MAJOR ACTIVITIES/TASKS needed to deliver each MD.

1. Inputs = nouns
   - *Required for the activities/task.*
   - *For each input, consider whether it: (a) originates from within another area of the project, (b) outside the project, but inside PHP, or (c) from outside PHP.*
2. Outputs = nouns
   - *Produced or resulting from the activities/tasks.*
3. Major activities/tasks = verb + noun
   - *The detailed work that must be done to achieve the MD.*
4. Repeat the process until each major activity/task has:
   - *One owner (may be multiple doers).*
   - *Clear deliverable.*
   - *Credible estimate of duration. Avoid 'padding' in your estimate. Padding represents a fear of failure.*
   - *A verb and a noun for each activity/task.*
5. More levels of task detail are needed when projects are larger, more risky, dissimilar to past projects, difficult to define, or resource intensive.
6. Teams can sub-divide into small groups and work on breaking down each MD. However, more minds working to identify the major activities/tasks typically produces faster results with fewer holes in thinking.
7. Once complete and validated, this Wall-based Processing should be transcribed into a Work Breakdown Structure as seen below. Or, an orderly list is acceptable.



Example, Final Work Breakdown Structure in map form

How, who & when

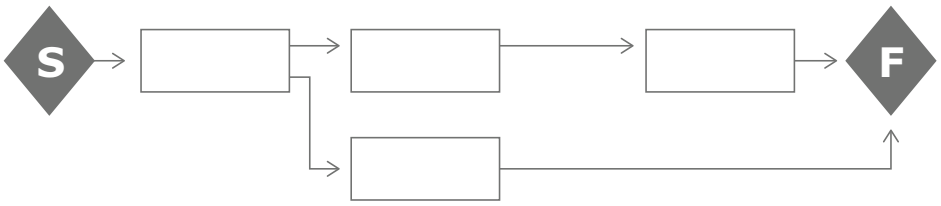
Logical dependency mapping & preliminary schedule

Purpose

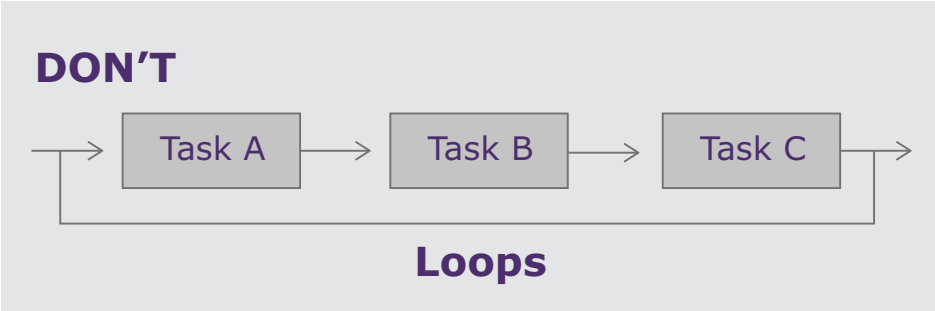
The tasks in the WBS are laid out in logical sequence - indicating when tasks can start based on dependencies, but without regard to perceived resources or time constraints.

- Requires LOGICAL RELATIONSHIPS + TASK DURATION ESTIMATES.
- Presents the flow/sequence of work.
- Do not include dates yet.

Description



- Each task must have a predecessor and a successor (no 'dangling' tasks).
- Most tasks are dependent on the start or completion of other tasks.
- Focus only on logical dependencies, not resource dependencies.

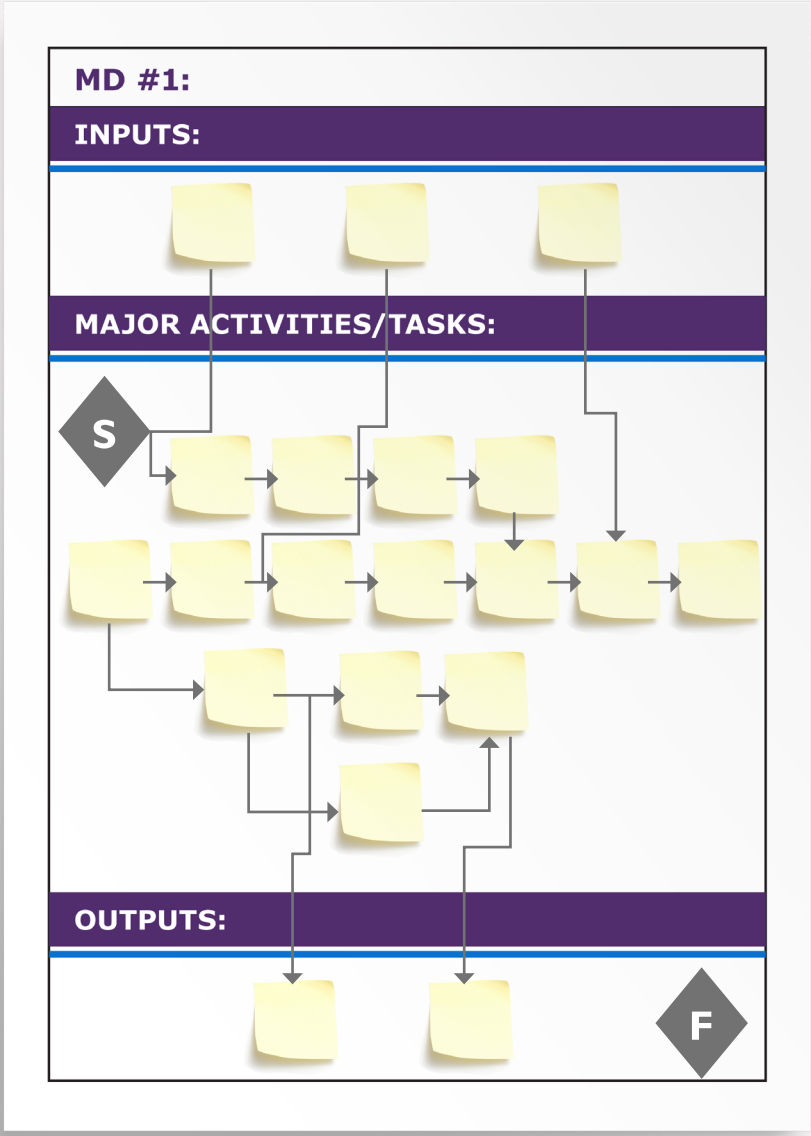


IMPORTANT!

Avoid 'Loops' in logical mapping. Loops are an incorrect, circular logical flow between tasks.

Method

Wall-based processing.



Resources

- Use previously completed Major Deliverable Work Breakdown Structure charts.
- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Yellow and blue color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

1. Place “S” (Start) and “F” (Finish) milestones in your diagram - Use Post-it notes.
2. Move and arrange major activities/tasks from previous exercise into the most appropriate or logical sequence.
3. Ensure that all inputs have at least one successor.
4. Ensure that all outputs have at least one predecessor.
5. Draw lines, elbows and arrow connectors as needed.
6. Disregard any perceived time constraints or resource limitations at this time.
7. List any assumptions identified during this process on BLUE post-it notes. Ensure these are captured with tasks.

IMPORTANT!
Use a pencil and eraser when drawing logical dependency connections. Mistakes and corrections are frequent.

See “See PHP’s Project Management Mastery Guide” text book or course for more information on creating a final project schedule and resource plan.

Issues & risks

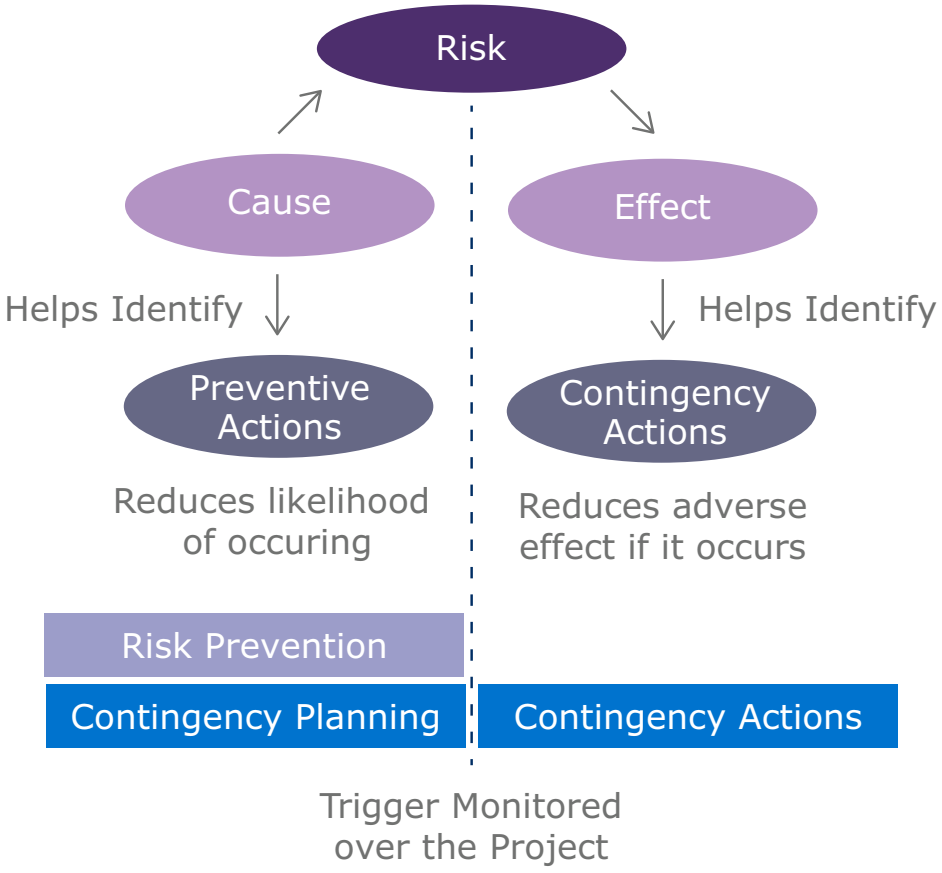
Risk assessment matrix

Purpose

Identify risks that threaten the success of the project. This helps to quantify the overall level of risk in the project.

Description

- Identify risks.
- Assess risks.
- Create risk management plans.



Method

Wall-based processing.

RISK	POTENTIAL IMPACT	LIKELIHOOD OF OCCURRENCE	DIFFICULTY OF TIMELY DETECTION	OVERALL THREAT
A	H	L	L	M
B	L	H	H	M
C	M	H	M	H

Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Blue color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

1. Individually, write the top 3 project risks on blue colored Post-it notes.
2. For each risk, rank the following factors: Potential Impact, Likelihood of Occurrence, Difficulty of Timely Detection, and Overall Threat in terms of "High" "Medium" or "Low."
3. Do not attempt to use numbers to quantify risk.
4. Place each identified risk and corresponding factor in the Risk Assessment Matrix (create on flip-chart).
5. Do not discuss risks as a group until all individual team members have completed their 3 risks and placed them within the matrix.
6. Do not remove any duplicate risks or attempt to organize/group them in any way.
7. As a group, determine the 3 most common risks identified by the group. Ensure that the risks identified are valid and logical.

IMPORTANT!
Risks such as "Senior leader buy-in" or "available resources" are not typically valid project risks when sponsors have been identified, validation cycles are established, and comprehensive project plans are completed.

Issues & risks

Risk management plans

Purpose

Create a risk management plan for each of the most threatening risks. The risk management plan includes preventive actions (where possible) and contingency plans.

Description

- Each risk management plan should be clear and well defined.
- Develop "triggers" for each risk. Triggers are specific, binary, automatic, appropriate and time-bound.

EXAMPLE
Risk: Our supplier may be late.
Trigger: Material has not arrived 7 days after the delivery date.

Method

Wall-based processing.

RISK	PROVENTIVE ACTION	CONTINGENCY ACTION	TRIGGER(S)	OWNER
A	H	L	L	M
B	L	H	H	M
C	M	H	M	H

Resources

- Flip-chart paper, white-board, easel, z-racks, or suitable wall space.
- Blue color Post-it notes.
- Black Sharpie markers.
- Access to Mural collaboration tool (or similar).

Actions

1. Use the top 3 risks identified by your team in the last exercise.
2. As a group, define the Preventive Action(s), Contingency Action(s), Trigger(s), and Owner for each risk.

Tools & methods

Gallery walks

Purpose

The unit of review for all projects at Population Health Partners is the Gallery Walk. A Gallery Walk demonstrates your projects collective efforts and working process during the critical planning stages. The intent is to provide the project core team with an open and collaborative format for feedback.

Description

A Gallery Walk consists of a docent (one knowledgeable core team member who can provide a brief introduction and answer questions as needed) and a group of experts, stakeholder or relevant associates from around the organization who review your project planning.

- Only one project team member is present: the nominated docent.
- Participants could consist of your project sponsor, key stakeholders, associates who may be affected by the outcome of your work, senior leadership, or content experts.
- Gallery Walks should occur often.

Action

A Gallery Walk may be conducted in groups, but feedback is always:

- Done individually.
- With minimal talking.
- Using Post-it notes, left in the appropriate areas.
- Initials left on any comment.
- Specific.
- Focused on what need to be clarified, is missing, inconsistent or fuzzy.

Dashboards

PROJECT TITLE GOES HERE / EXAMPLE OF FILLED IN FORM

POS

Deploy a xxx service and supporting information backbone infrastructure worldwide by April 30, 2xxx for $4M.

FM	SC	SCH	RE
L			
M			
MO			

METRIC	STATUS	TREND	PROBLEM STATEMENT	CORRECTIVE ACTION
SCOPE	Off-track On-track At risk	Steady Improving Concerned		
SCHEDULE	Off-track On-track At risk	Steady Improving Concerned	Schedule is exposed by 1 week.	Team is assessing ways to pull in the schedule weekly.
RESOURCES	Off-track On-track At risk	Steady Improving Concerned		
QUALITY	Off-track On-track At risk	Steady Improving Concerned		
OVERALL HEALTH	Off-track On-track At risk	Steady Improving Concerned	On track to Go Live date of 5/1/xx, but due to potential schedule slips in the Test phase, date could be moved.	Have implemented daily tactical conference call so that potential problems surface earlier and areas

SUMMARY

RESULTS

- Integration has begun
- Production Support Strategy milestone pulled in by 3 weeks to 5/3/xx
- System Test Plan Rev 1.1 released
- Package built for ABC Conector and ready for submittal to IT 1.4 Integration Testing
- Connector Moved to System Test Environment
- Small set of test cases exist on 104. for opportunistic testing
- Code Walkthru of the WorkFlow Agents was done on 3/16/xx

NEXT STEPS

- Completion of all core components
- Completion of Phase 1 of system test
- Complete fail-over strategy
- Schedule support training
- Complete the connector

WORKING

- IT connector development
- Performance assessment report
- System test
- Support deliverables

CHALLENGES

- Delivering to a tight schedule
- Personnel transitions in two domain teams

Task status

TASK	WBS	OWNER	PLAN START	PLAN FINISH	ACTUAL START	ACTUAL FINISH	WHY
ISSUES							
LESSONS LEARNED							

Purpose

A tool for tracking major activity/task progress.

Description

There are two types of data we seek while tracking and managing a project:

1. Hard quantitative data - What is happening?
   - If started, on what date did the task start?
   - If not started, on what date will the task start?
   - If finished, on what date did the task finish?
   - If not finished, on what date will the task finish?
2. Soft qualitative data - Why is it happening?
   - Listen carefully.
   - Ask why: “Tell me more...” “Help me understand...”
   - Be alert to: Requirement changes, requests, organizational conflicts and issues.

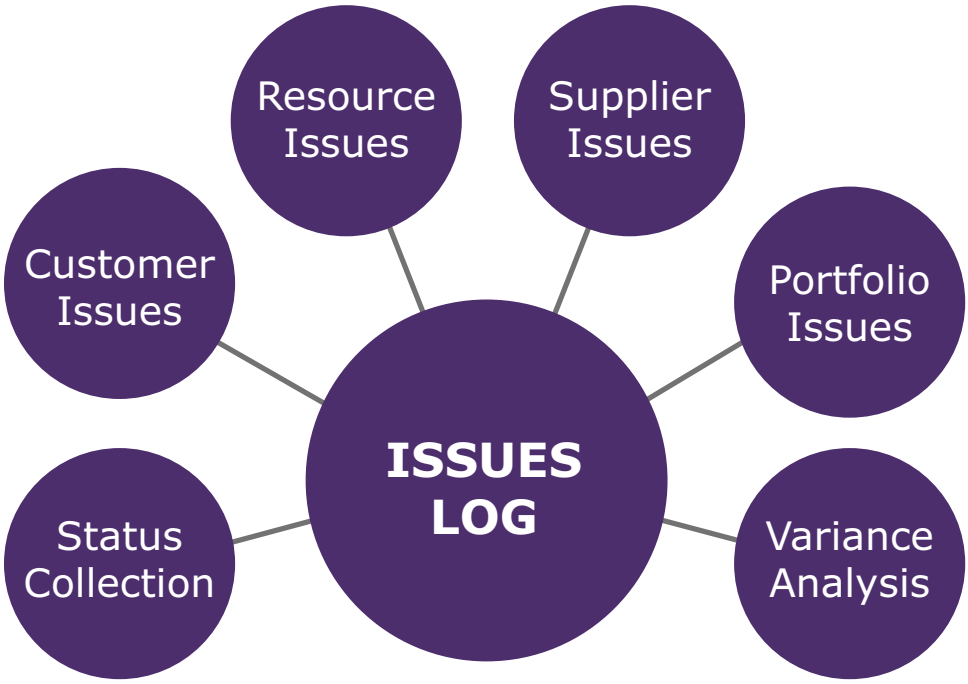
Issue log

ISSUE	OWNER	DUE DATE	STATUS OR RESOLUTION	CLOSE DATE

Purpose

A tool for tracking issues or delays in project work.

Description



- Hold issue resolution meetings when needed with entire project team.
- Issues are not gossip.
- Hold issue owners accountable.
- Adjust scope, schedule and resources as needed and then validate with sponsor.
- May need to update Project Plan.
- May need to escalate to sponsor.

Definitions

Why & what

Portfolio
The prioritized set of all projects and programs in an organization.

Program
A single coordinated effort with multiple interdependent projects.

Project
A collaborative initiative that produces results that matter to our customers and ourselves. Through the discipline of project management, we balance the constraints of work specification (what we deliver), time, cost and risk to create a measurable product, service or result. Projects are aligned to the goals of the customer and our organization. Teams and individuals are aligned to projects. All projects have a plan and a reporting dashboard.

Project Objective Statement (POS)
A short statement of the project's target scope, schedule, and resources.

Success Criteria
A tool used to differentiate between what is included versus what is not included in the definition of success for a project.

Flexibility Matrix
A matrix indicating how the project team should address changes in scope, schedule, and resources if project changes need to occur. The team will apply the matrix as a tool to guide recommendations regarding trade-offs in planning as well as guiding recommendations in dealing with issues during execution.

Major Deliverable (MD)
A key project output. The major deliverables of a project are tangible items that are created as a result of the project work and that fulfill needs of internal and/or external customers. MDs deliver the POS.

Is/Is Not
A tool used to differentiate between what is included versus what is not included in the scope of a deliverable or any other item being defined.

Who, how & when

Project Sponsor
The senior leader who initiates, validates, and authorizes the project.

Project Leader/Manager
The individual who will lead the project team.

Cycle of Validation
Obtain approval to proceed or alter the project plan with sponsor.
A repeated process as needed.

Project Plan
The Project Plan contains a Program Objective Statement, Major Deliverables, Flexibility Matrix and other descriptive information about the project. This document summarizes all work done in a project planning workshop. A PHP specific template is provided separately.

Work Breakdown Structure (WBS)
A hierarchical, systematic structure for defining project work and preliminary schedules.

Major activity/Task
The work required to produce a Major Deliverable.

Completion Criteria
A clear and binary definition of a task's output. The completion criteria defines what "done" looks like.

Major Activity/Task Owner

The individual who plans and manages a task – not necessarily the person who performs the task.

Predecessors
The tasks that effect the beginning of a given task.

Successors
The tasks that are dependent on the finish of a given task.

Milestone
A point in time marking a key event or accomplishment.

Risks & issues

Risk
An event that would threaten the success of the project if it were to occur. Risk MIGHT occur. If they are certain to occur, they are not risks.

Parking Lot Risks
Risks that have been identified during the project team's work to this point; but have yet to be assessed or managed.

Preventive Action
Steps taken to prevent an identified risk.

Contingency Action
Steps identified to be taken if a risk event were to occur in the future.

Trigger
A metric identified to signal the occurrence of a risk event.

Risk Owner
The person who is responsible for recognizing that a specific risk trigger has occurred.