# DEFINE ROLES AND RESPONSIBILITIES

To foster collaboration and avoid conflict, it is necessary to clarify which individuals or groups are responsible for a project's successful completion, and the roles that each will play throughout the project

**R** — Who is Responsible
The person who is assigned to <u>do</u> the work. Must be at least one

**A** — Who is Accountable
The person who makes has the <u>ultimate authority.</u> Must be one

**C** — Who is Consulted
The person who must be consulted <u>before</u> a decision or action is taken

**I** — Who is Informed
The person who must be informed that a decision or action <u>has been</u> taken

# RACI

| WBS ID | Steering Committee | Core team | Sponsor | Project manager | Project team Name | Project team Name | Project team Name | Project team Name | Supplier Name | Contractors Name |
|---|---|---|---|---|---|---|---|---|---|---|
| ID1.1.1 | A | R | | | C | C | | | I | |
| ID1.1.2 | | A | | R | | | | | | |
| ID1.2 | | | | A | R | R | R | R | | I |
| ID1.3.1 | A | R | | | C | C | | | I | |
| ID1.3.2 | | A | | R | | | | | | |
| ID2.1 | | | | A | R | R | R | R | | I |
| ID2.2.1 | A | R | | | C | C | | | I | |
| ID2.2.2 | | A | | R | | | | | | |
| ID2.3 | | | | A | R | R | R | R | | I |

# DEVELOP SCHEDULE

To build the detailed plan of the project, project team must proceed with:

- Sequencing activities
- Estimate workload for each activity
- Identify dependencies
- Insert buffers
- Identify intermediate milestones and deliverables
- Identify the critical path

# DEVELOP SCHEDULE: A FEW KEY CONCEPTS

Activity sequencing does not always imply dependencies

Workload is not duration

Buffers should be introduced on activities at risk

Intermediate milestones and deliverables avoid "tunnel effect"
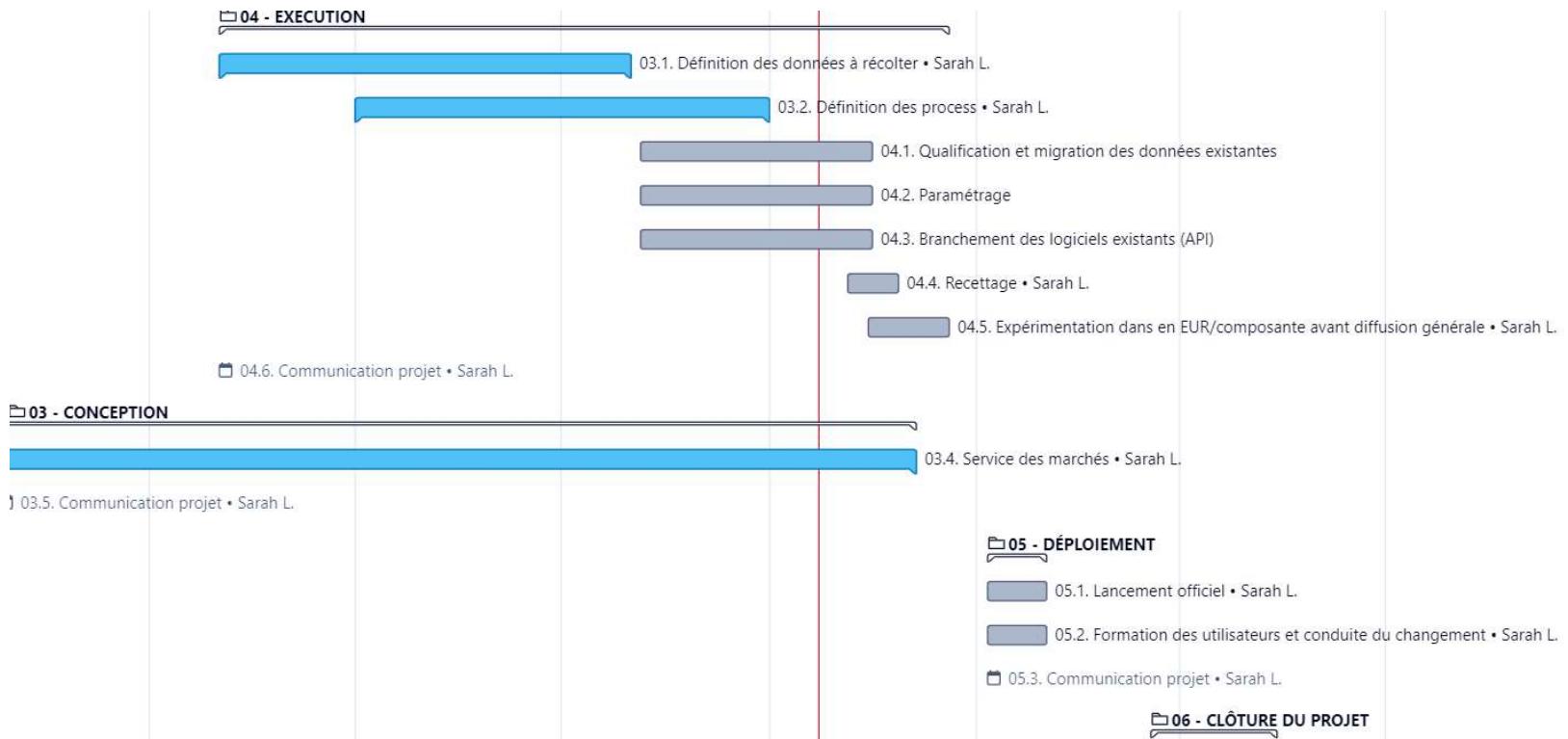
The critical path is the continuous string(s) of critical activities in the schedule between the Start and Finish of the project

- The sum of the activity durations in the critical path is equal to the project's duration
- A delay to any critical activity will result in a delay to the project completion date

# GANTT

Is a visual representation as a bar chart of the project schedume

# DEFINE BUDGET

Is the total envelop attributed to the project:

Project Budget = Cost Baseline + Management Reserve

Cost baseline is composed of:

- Human workload
- All other costs (material, space location, licences, consultancy, externalisation of work, etc.)
- Contingency reserve

Contingency reserve is a margin to handle *known/unknown risks*

Management reserve is a margin to handle un*known/unknown risks*

# THE FIRST BASELINE

Is the approved reference over which the project is monitored and assessed as it progresses
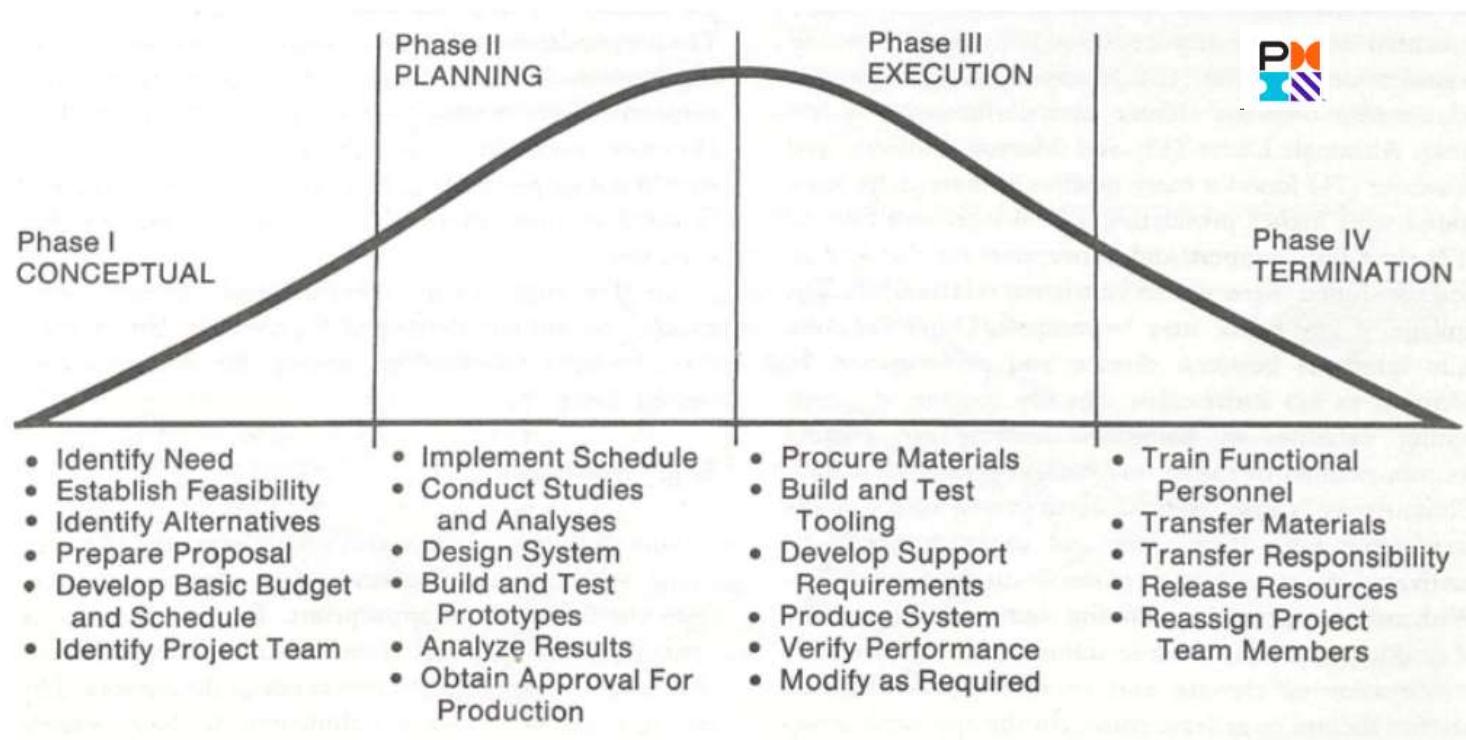
Completed by the Project Manager

Reviewed by the Core Team

Approved by the Sponsor at the end of Concept & Planning phase

Shared to main project contributors and stakeholders

# CONCEPT AND PLANNING: FINAL CONSIDERATIONS



Phase II
PLANNING

Phase III
EXECUTION

Phase I
CONCEPTUAL

Phase IV
TERMINATION

- Identify Need
- Establish Feasibility
- Identify Alternatives
- Prepare Proposal
- Develop Basic Budget and Schedule
- Identify Project Team

- Implement Schedule
- Conduct Studies and Analyses
- Design System
- Build and Test Prototypes
- Analyze Results
- Obtain Approval For Production

- Procure Materials
- Build and Test Tooling
- Develop Support Requirements
- Produce System
- Verify Performance
- Modify as Required

- Train Functional Personnel
- Transfer Materials
- Transfer Responsibility
- Release Resources
- Reassign Project Team Members

# KEY TAKE-AWAYS

The project charter is a fundamental document officialising the existence of the project, most of project success comes from the quality of its redaction

Do not underestimate stakeholder management
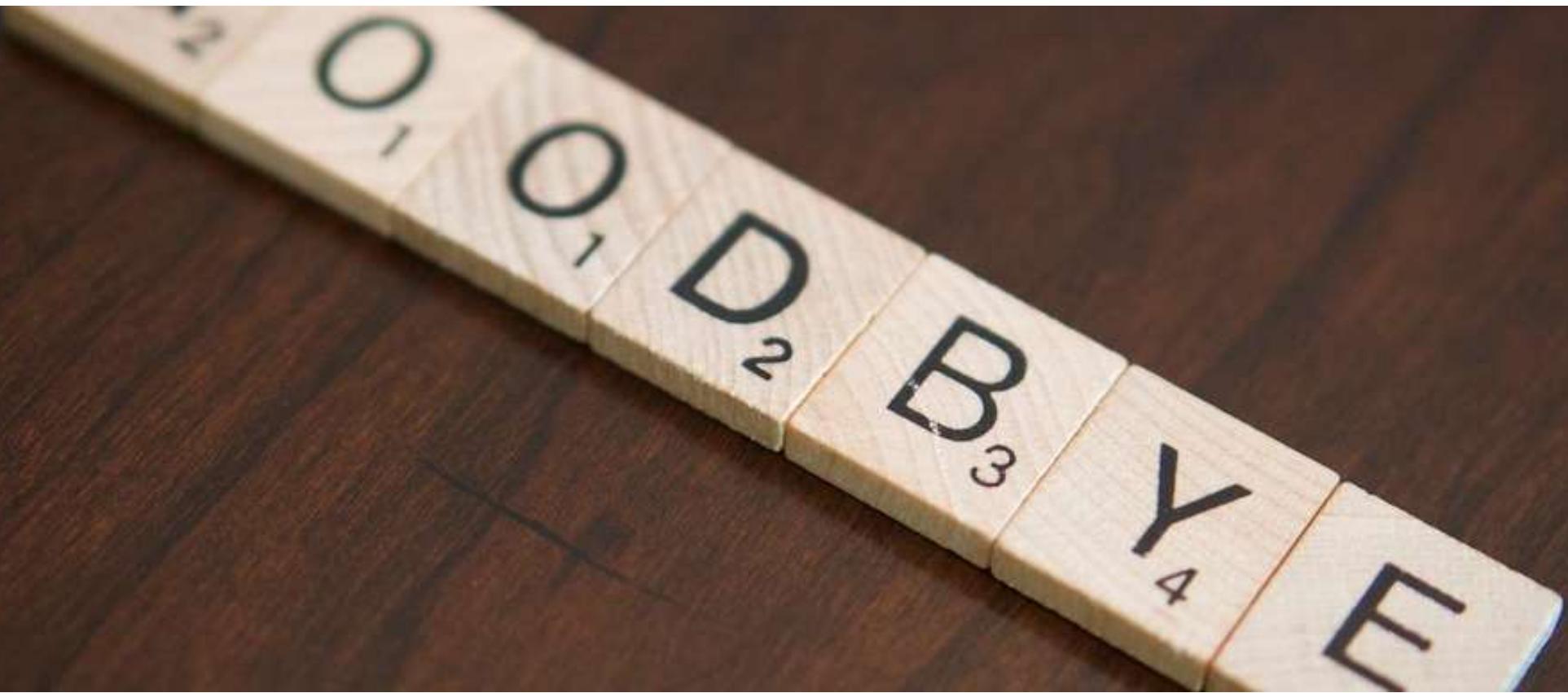
Communication is key for project success

Concept and planning phase aims at building the first baseline of the project

Q & A
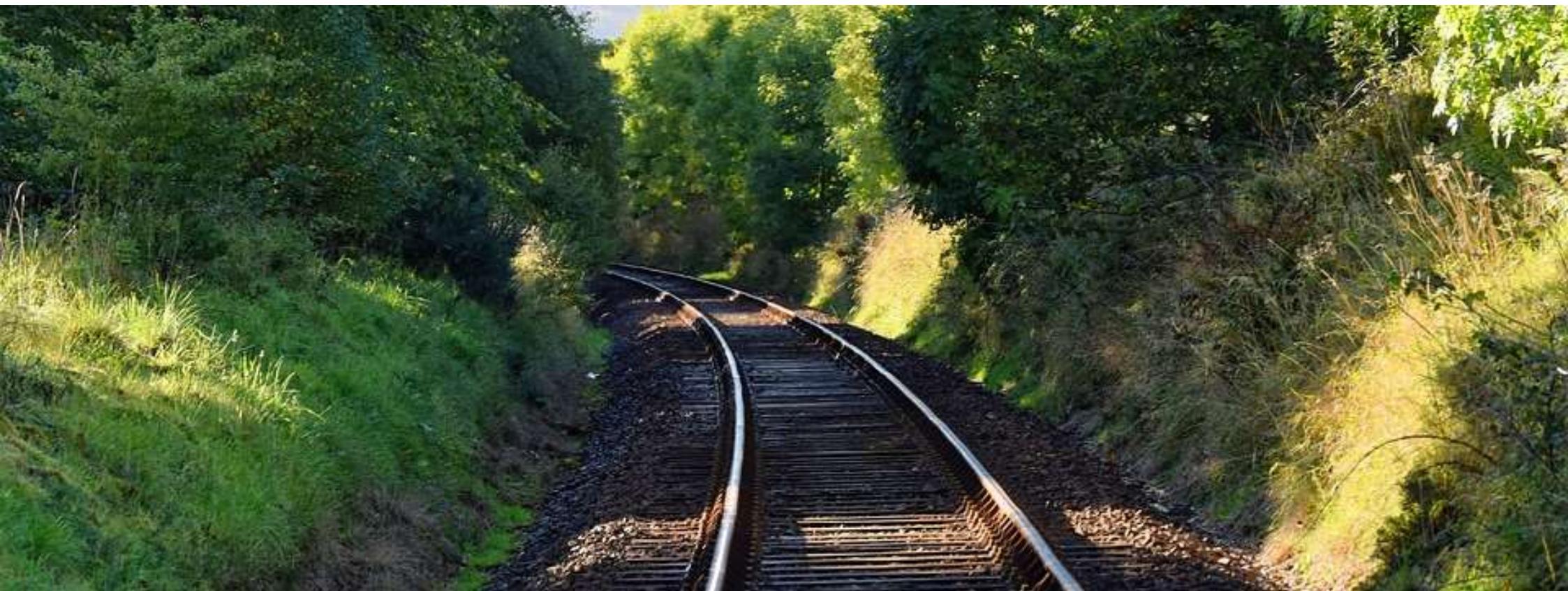
**SEE YOU ON THURSDAY
28NOV AT 9AM**

# WELCOME BACK!

# KEEPING THE PROJECT ON TRACK

# PROGRAM OF THE SESSION

Evaluation

**Keeping the project on track**

- Project follow-up: Core Team and Steering Committee meetings, and other tools
- BREAK
- Risk management
- Change management

# REALISATION PHASE: OBJECTIVES

Aim: get work done according to agreed quality and performance standards to ensure the delivery of the project deliverables

All the project team and the steering committee act to secure the deliveries, implementing appropriate processes linked to monitoring and controlling, in particular change and risk management

Formal decisions on:

- deliverables progress

- changes

| Proposal | Concept & planning | Realisation | Delivery | Closure |

# REALISATION AT A GLANCE

Request for change

Monitor project progress

Progress report

Action registry

First baseline

Change registry

Take corrective actions

Communicate on project progress

Risk registry

Product(s)

Manage risks

**Realisation**

Steering committee

Core Team

Steering committee

Final delivery

# MONITOR PROJECT PROGRESS

To monitor the progress of a project, we compare the work done with the planned work using indicators. This makes it possible to identify and treat blockages

- Progress and steering committee meetings

- Action registry

- Earned value management

# PROGRESS MEETINGS

| Who | Core team |
|---|---|
| When | Weekly |
| What | Progress of actions |
| | Review status and effectiveness of risk mitigation |
| | Track deliverables (delivery and quality) |
| | Track phase exit criteria |
| | Track next milestones |
| | Prepare and review presentations for the steering committee |
| | Share problems encountered |
| | Evaluate indicators |
| | Prepare and review change requests |

# DECISION MEETINGS

| Who | Steering committee |
|---|---|
| When | Monthly / trimestrial/ on demand … |
| What | Progress of actions |
| | Review and act on major risk mitigation / escalation |
| | Track majors deliverables (focus on risks and action) |
| | Approve phase exit criteria |
| | Track next milestones (focus on risk and action) |
| | Escalate major problems encountered |
| | Evaluate indicators |
| | Take expected decisions |
| | Approve change requests |

# PROGRESS AND STEERING COMMITTEE MEETINGS

|  | Progress Meeting | Steering Committee Meeting |
|---|---|---|
| Who | Core Team | Steering Committee |
| When | Weekly | In Monthly/bi-monthly/6 weeks/on demand... |
| What | Actions progress | Follow-up actions/decisions from previous SCM |
|  | Risks mitigation status/effectiveness | Top Risks shared with plans and costs |
|  | Monitor deliverables (delivery and quality) |  |
|  | Monitor next exit review criteria | Accept to move to next phase |
|  | Monitor next milestones |  |
|  | Issues shared | Share escalated and handled |
|  | Prepare/Review next SC meetings | Take expected decisions: Kick-Off, Delivery/First Baseline |
|  | Performance review | Approval of new baseline if needed |
|  | Decisions to create requests for change | Approval of major changes |

# MEETINGS BEST PRACTICES

## Sommaire

- Participants
- Decisions since last meeting
- Actions since last meeting
- Project progress
- Changes to be discussed
- Risks review
- Actions to be taken
- Next meeting

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GREAT meetings !
G – Goals: Define the clear objectives of the meeting
R – Roles: Clarify the roles of each participant (facilitator, etc.)
E – Expectations: Setting expectations for results and participation
A – Agenda: Create and follow a structured agenda
T – Timing: Respect the start and end times

# ACTIONS REGISTRY

It is important to keep a written follow-up of actions

Necessary and sufficient information: what (the action), who (does it), for when (due date), status (to be initiated, in progress, blocked, completed)

Any other information may be useful but not strictly necessary (e.g. comments that explain what has been done and what remains to be done)

| Action description | Owner | Due date | Status |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
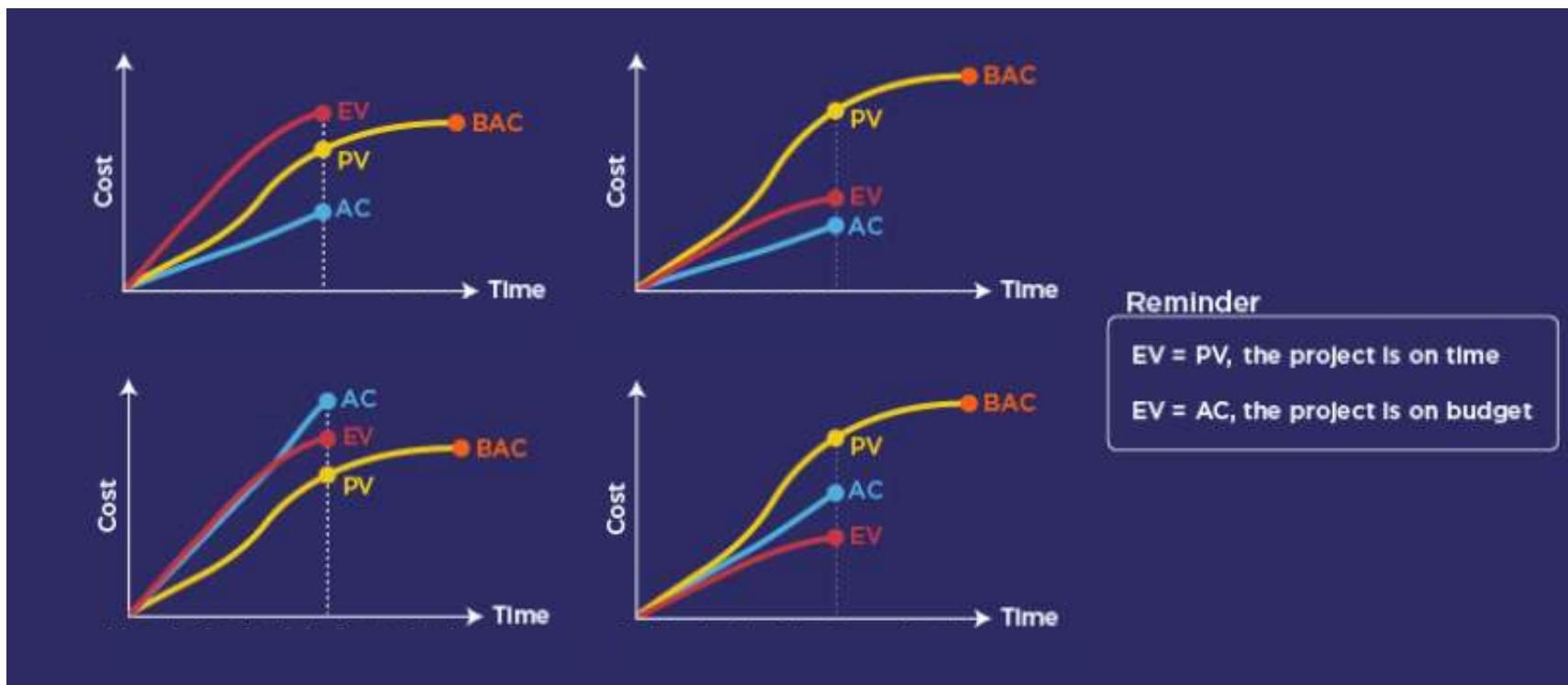
# EARNED VALUE MANAGEMENT

It is a tool to compare the performance measurement baseline to the actual schedule and cost performance. It integrates the scope baseline with the cost baseline and schedule baseline to perform the **performance measurement baseline**
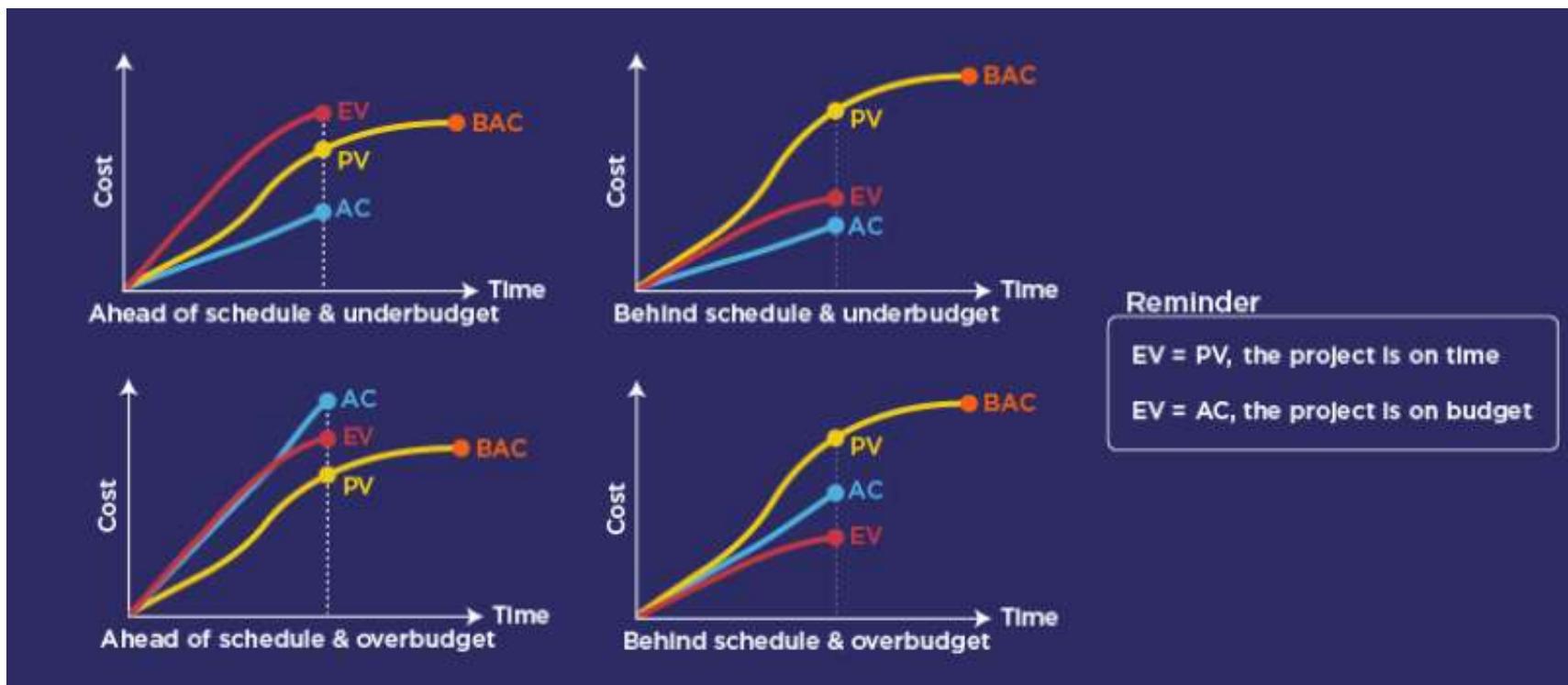
It needs three dimensions :

- **Planned Value** (PV) the authorized budget assigned to scheduled work. At a given point it time, it defines the work that should have been accomplished

- **Earned value** (EV), the measure of the work performed in terms of the budget authorized for that work. It is the budget associated with the authorised work that has been completed

- **Actual cost** (AC), the realised cost incurred for the work performed on an activity during a specific time period. It is the total cost incurred in accomplishing the work that the EV measured

# EARNED VALUE MANAGEMENT

# EARNED VALUE MANAGEMENT

# COMMUNICATE ON PROJECT PROGRESS

During the realisation phase, it is important to maintain the commitment of stakeholders, even those less directly involved in the phase

- Progress report

# COMMUNICATE ON PROJECT PROGRESS

## PROJECT PROGRESS REPORT

| Project name | | Date of the report | |
|---|---|---|---|
| Overall status | Select… | | |

### General information of the project

| Elements | Comments |
|---|---|
| Project manager name | |
| Sponsor name | |
| Phase of the project | Select… |
| Percentage of project completion | Select… |
| Next report date | |

### Health of the project

| Elements | Status | Comments |
|---|---|---|
| Deliverables | Select… | |
| Planning | Select… | |
| Budget | Select… | |
| Resources | Select… | |
| Risks | Select… | |
| Changes | Select… | |

### Next top 5 deliverables

| Name of the deliverable | Due date | Status | Comment |
|---|---|---|---|
| | | Select… | |
| | | Select… | |
| | | Select… | |
| | | Select… | |
| | | Select… | |

### Next top 5 milestones

| Name of the milestone | Due date | Status | Comment |
|---|---|---|---|
| | | Select… | |
| | | Select… | |
| | | Select… | |
| | | Select… | |
| | | Select… | |

### Changes to be discussed

| Description of the change request | Date of review | Level of approval | Type of change |
|---|---|---|---|
| | | Select… | |
| | | Select… | |
| | | Select… | |

### Main risks

| Description of the risque | Probability | Impact | Action plan |
|---|---|---|---|
| | Select… | Select… | |
| | Select… | Select… | |
| | Select… | Select… | |

### Useful links

| Elements | Links |
|---|---|
| Project space | |
| Planning | |
| Baselines | |
| Risk registry | |
| Action registry | |
| Change registry | |

### Conclusions

| Main points |
|---|
| |

# PROGRAM OF THE SESSION

Evaluation

**Keeping the project on track**

- Project follow-up: Core Team and Steering Committee meetings, and other tools
- BREAK
- Risk management
- Change management

# BREAK

Back in 10 minutes

# PROGRAM OF THE SESSION

Evaluation

**Keeping the project on track**

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- Risk management
- Change management
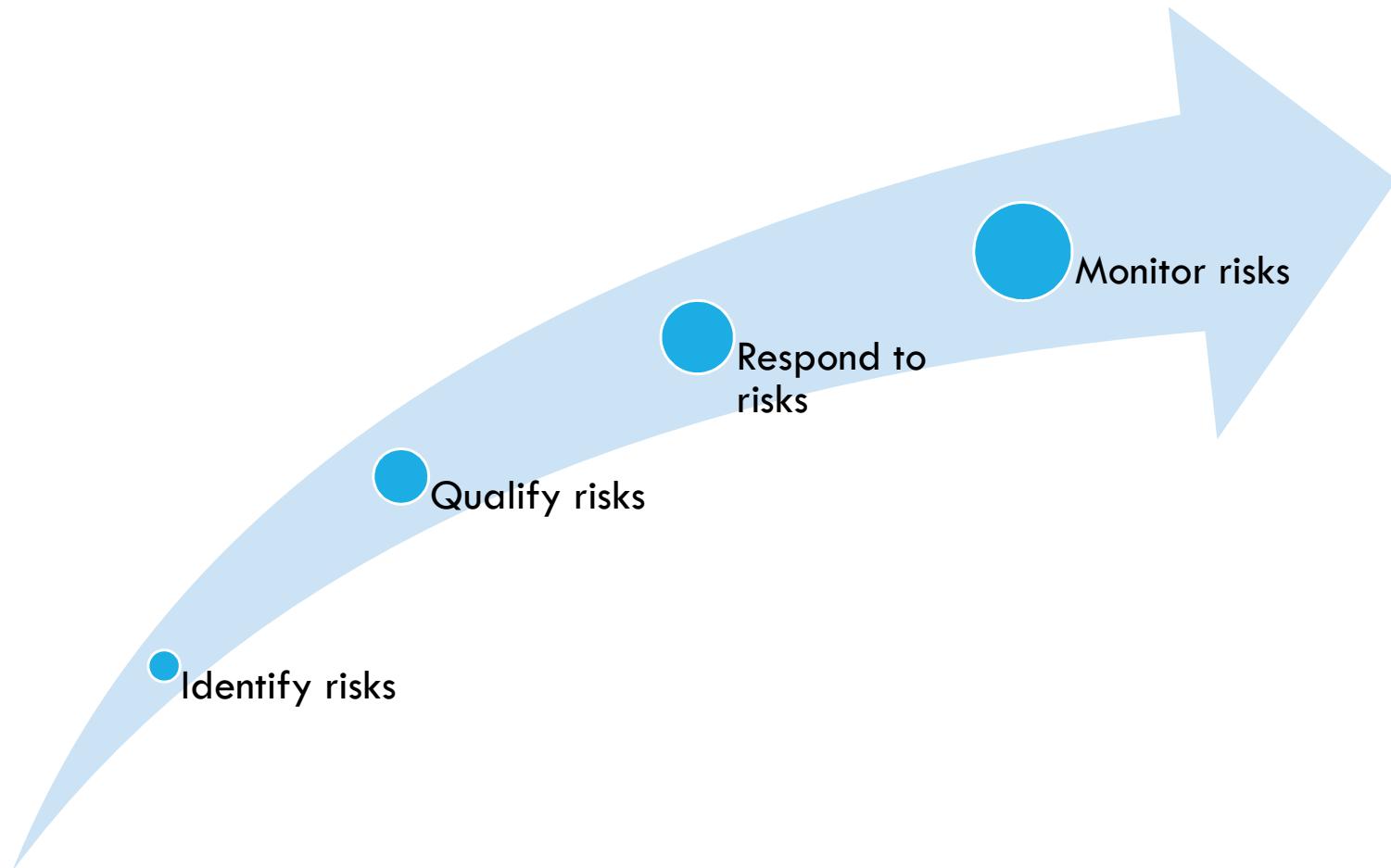
# WHAT IS A RISK?

An uncertain event or condition that may have negative effect on project objectives (scope, schedule, costs, quality ...)

Risks can be negative or positive (opportunity)
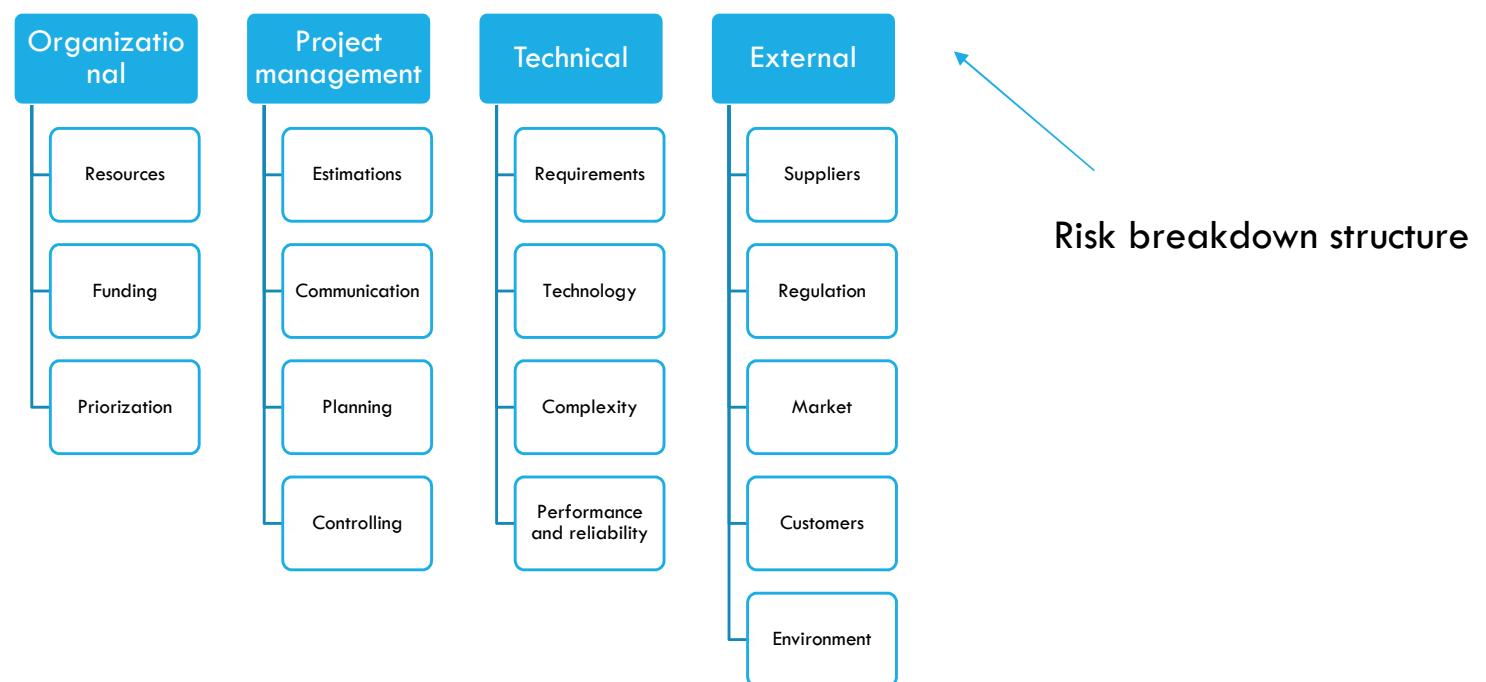
It is crucial for project success to anticipate them

# MANAGE RISKS



Identify risks

Qualify risks

Respond to risks

Monitor risks
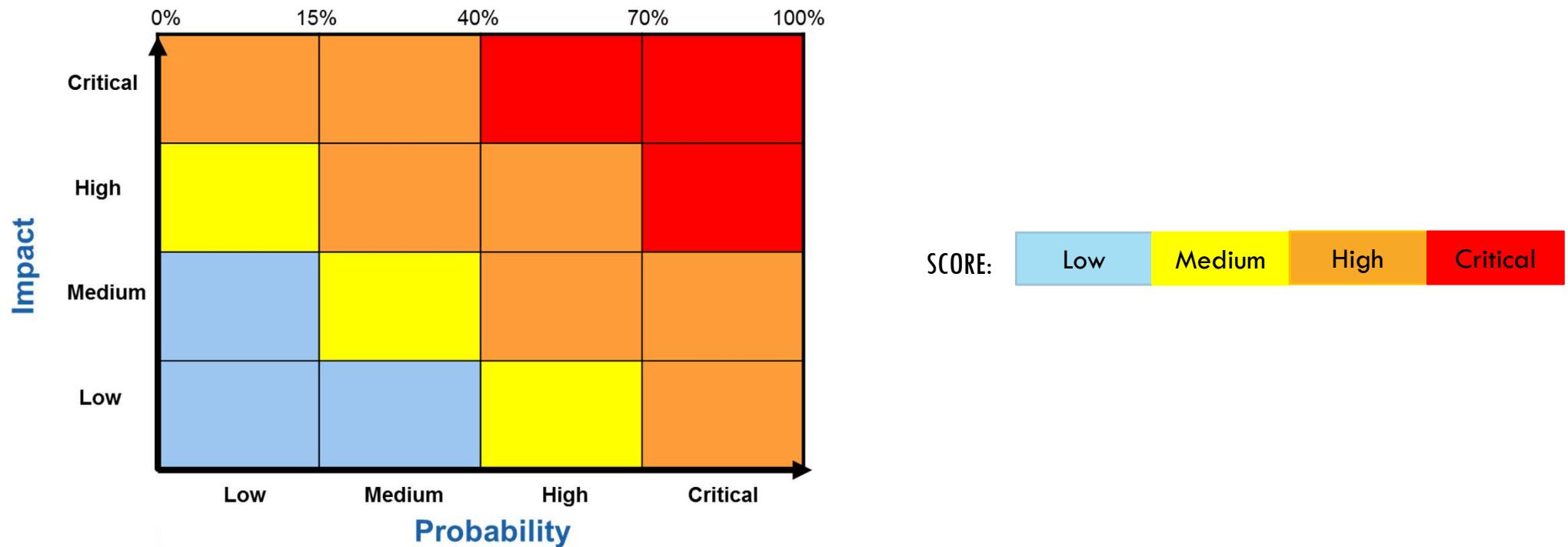
# IDENTIFY RISKS
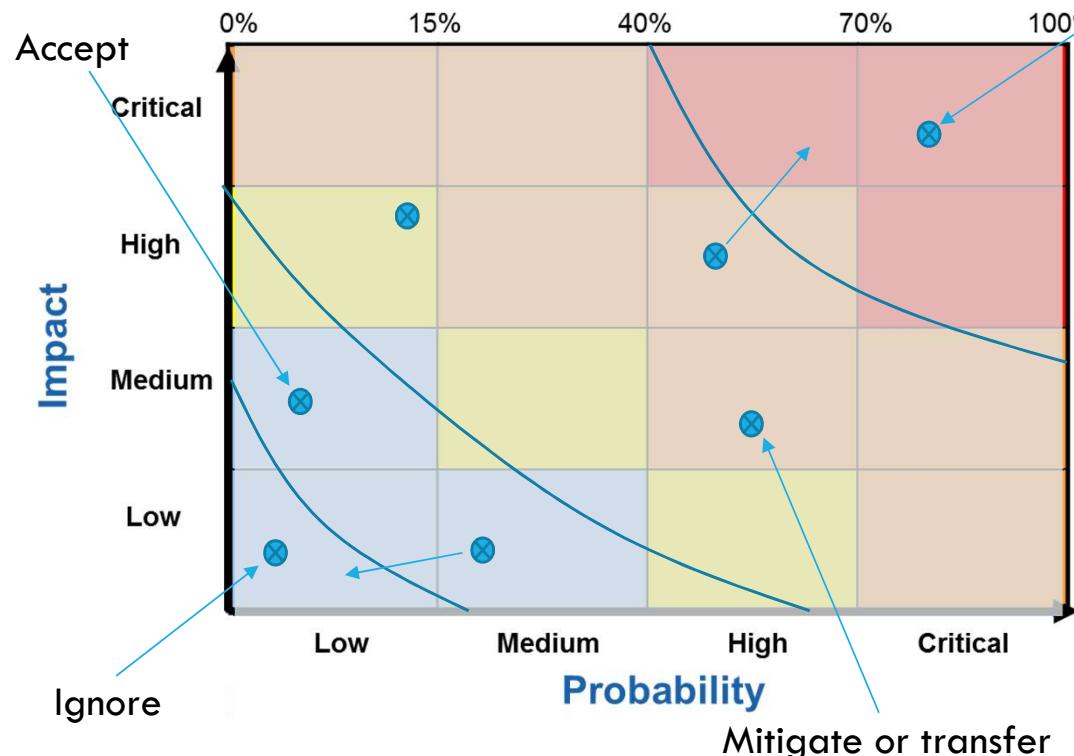
As a result of a <**CAUSE**>, an <**EVENT**> may happen within the following <**TIMEFRAME**> that may lead to <**IMPACT**> an <**OBJECTIVE**> of the project

| Organizational | Project management | Technical | External |
|---|---|---|---|
| Resources | Estimations | Requirements | Suppliers |
| Funding | Communication | Technology | Regulation |
| Priorization | Planning | Complexity | Market |
| | Controlling | Performance and reliability | Customers |
| | | | Environment |

Risk breakdown structure

# QUALIFY RISKS

# RESPOND TO RISKS



| Response type | Action |
|---|---|
| Avoid | Elimination of threat by avoiding the activity |
| Mitigate | Reduce *probability* and/or *impact* to lower levels (mitigation plan) |
| Transfer | Shift risk handling to a third party |
| Accept | You don't take action yet but keep one eye on it |
| Ignore | You don't take action and you don't monitor it |

What if a risk materializes? You should have a contingency plan!
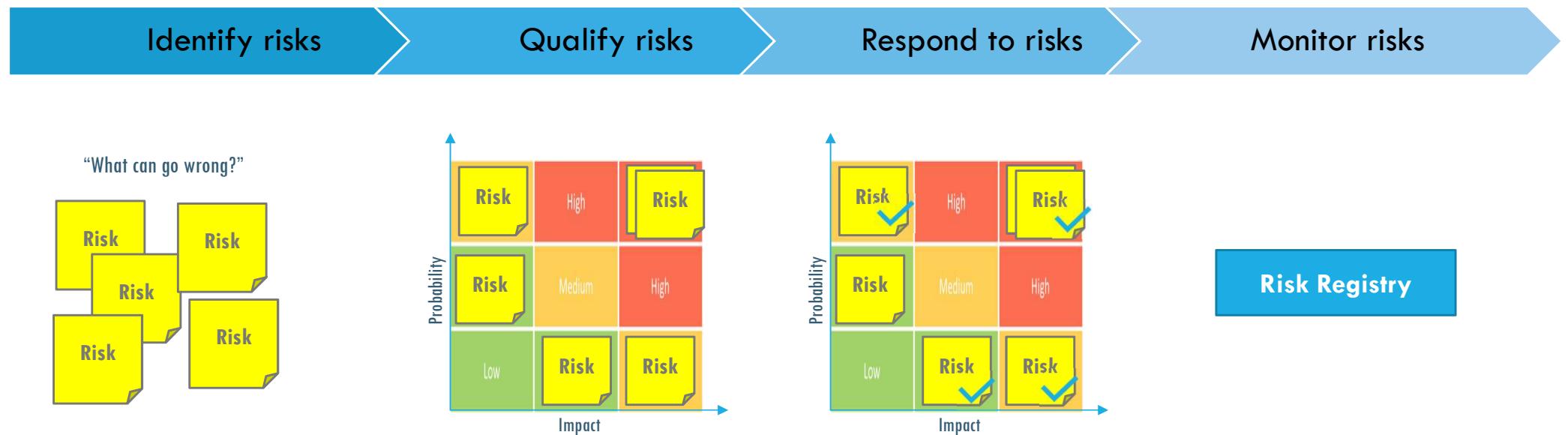
# MONITOR RISKS

To monitor risks, you can use a risk registry

Necessary and sufficient information:

| Risk description | Probability | Impact | Score | Owner | Risk response | Description of the response |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |

# MANAGE RISKS



| Identify risks | Qualify risks | Respond to risks | Monitor risks |

"What can go wrong?"

Risk Registry

# PROGRAM OF THE SESSION

Evaluation

**Keeping the project on track**

- Project follow-up: Core Team and Steering Committee meetings, and other tools

- BREAK

- Risk management

- Change management

# CHANGE MANAGEMENT

What is a change?

A modification to any **formally** controlled deliverable, project management plan component, or project document

Change management is the process of handling changes throughout the project lifecycle

# THE CHANGE CONTROL BOARD (CCB)

Formally chartered group responsible for reviewing, evaluating, approving, delaying or rejecting changes to the project, and for recording and communicating such decisions

| Impact | Decision | Change control board | Level of change |
|---|---|---|---|
| Minor or no impact | None | Impacted team | None |
| Intermediate deliverable | Accept, delay, reject | Core Team | Level 1 |
| Baseline | Accept, delay, reject | Steering Committee | Level 2 |
| Project objectives | Stop or continue the project | Go/No-Go Committee | Critical |

# CHANGE IDENTIFICATION AND QUALIFICATION

Requests for change must be **formally submitted**

The request should include the description of the change in terms of nature (scope, cost, schedule, etc.) and impact (cost, schedule, resources, dependencies, etc.)

According to the level of impact the request will be analysed, discussed and handled by the appropriate change control board

# CHANGE CONTROL

After the decision on the request is taken, the new change is **recorded** in the project change registry and **communicated** to the stakeholders according to the level of change

According to the level of change, a **new baseline** could be defined for the project. This will be the new reference to evaluate project performance

# IS IT BAD TO CHANGE?

No, as long a:

- The origin of the change can be explained
- The impact of the change has been fully analysed
- Formal approval has been obtained by the appropriate CCB
- The decision has been clearly communicated to the stakeholders and identified documents updated (including the basline)

# KEY TAKE-AWAYS

The realisation phase aims to carry out the work according to the agreed quality and performance standards in order to ensure the delivery of the project deliverables

To monitor the progress of a project, the work done is compared with the planned work using indicator, like EVM

Progress is monitored through regular core team meetings and the keeping of a shared action registry

Ensuring communication on the progress of the project is fundamental in order to support the interest and focus of stakeholders

Steering committee is involved in strategic decisions and actions

Risk and change management are necessary processes to keep project under control

# Q&A

# DELIVERY PHASE: OBJECTIVES

Aim: ensuring project output is shipped
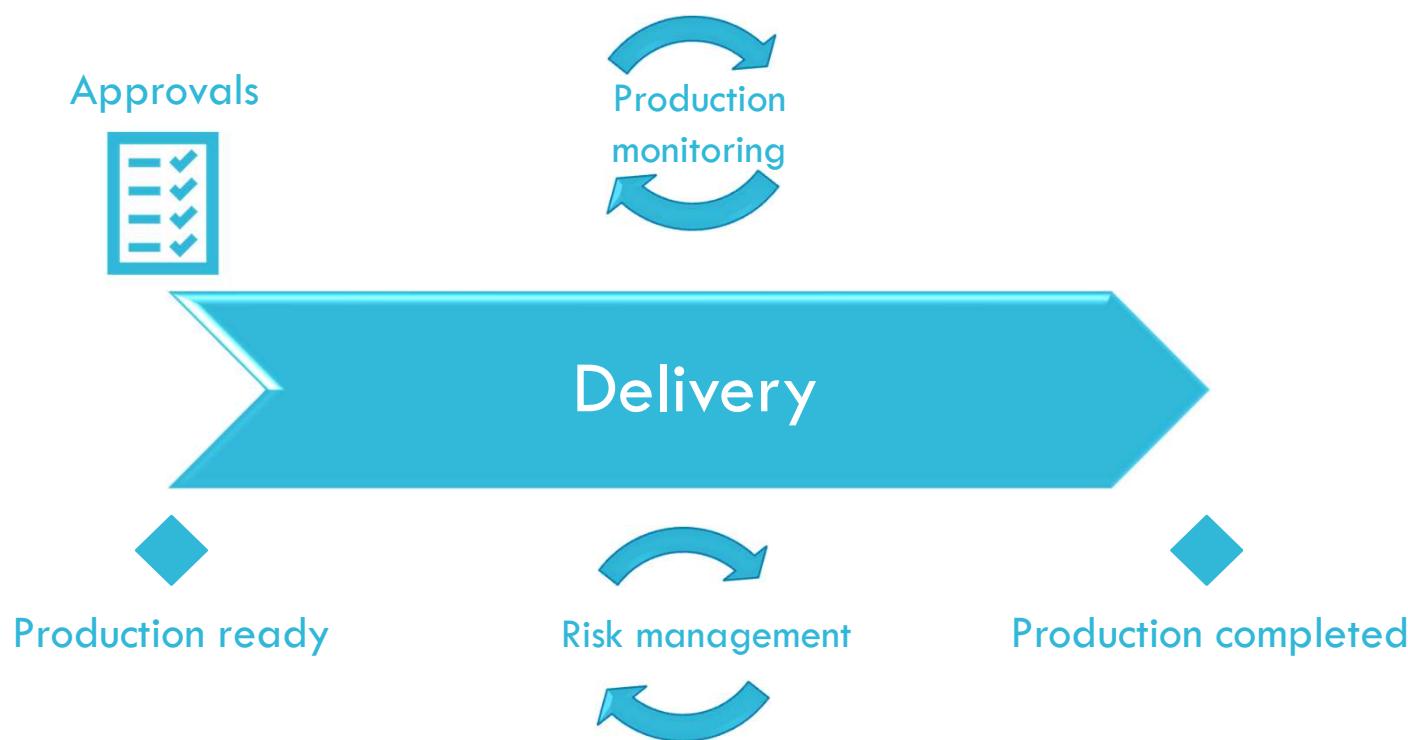
All activities needed to deliver product is handled

Formal decision based on:
- project team approval
- steering committee approval
- possible customer acceptance

Proposal | Concept & planning | Realisation | Delivery | Closure

# DELIVERY DELIVERABLES AND MILESTONES

# FINAL DELIVERY

At the end of the phase, it must be verified that the products are ready for the final delivery, i.e. that they meet the quality criteria defined in the PMP (verification) and the expectations expressed by the stakeholders at the beginning of the project (acceptance)