Project Management Methodology

Enterprise Systems

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Summary

Purpose

This methodology was created by Enterprise Systems as a means to establish formal project management policies and procedures. During the creation of this methodology a focus was placed on ensuring that it was generic enough to be applied to all projects within Enterprise Systems. The methodology provides a strong framework for constructing successful projects but leaves project leads with flexibility to incorporate additional tools, processes, techniques and assets to be successful. The methodology is flexible enough to be easily modified as Enterprise Systems grows or takes on additional responsibilities.

Audience

The methodology defined in this document is intended for individuals working on projects within Enterprise Systems with a specific focus on individuals leading those projects.

Overview

This section provides an overview, description and purpose of the methodology used by Enterprise Systems. This methodology provides a standard management approach for the implementation of new projects. The methodology used by Enterprise Systems is based on the Project Management Book of Knowledge, PMBOK®, written by PMI.

Definition of a Project

"A project is defined as a temporary endeavor undertaken to create a unique product or service," - PMBOK®.

A project is considered to be temporary endeavor with specific goals to accomplish defined objectives. The completion point of the project must be defined and agreed upon by stakeholders during the Initiation of the project.

Definition of Stakeholders

"Individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion. They may also exert influence over the project and the results," - PMBOK®.

In order to accomplish stakeholder's goals and meet their expectations projects need well defined goals and clear defined business functions. Stakeholders are key in helping provide, develop and influence business decisions and goals within a project.

Project Process Groups

All projects are unique and have different constraints and uncertainties.   By dividing the project into process groups they become much easier to manage. These process groups are known as the project life cycle. The five process groups that make up the project life cycle are listed below:

1. **Initiation** – In this process group the project is defined and organized.
2. **Planning** – In this process group a project plan is developed that is in line with stakeholder's goals.
3. **Executing** – In this process group the project plan is implemented and resources are coordinated and allocated to the project.
4. **Monitoring and Controlling** – This occurs throughout all process groups of the project. Goals and objectives are monitored and actions are taken to overcome issues or problems. Open communication and collaboration among all project members is needed in order to identify and resolve issues or problems that may arise.
5. **Closing** – This process group formalizes the completion of the project with the customer and stakeholders officially accepting the completion of the project and providing feedback.
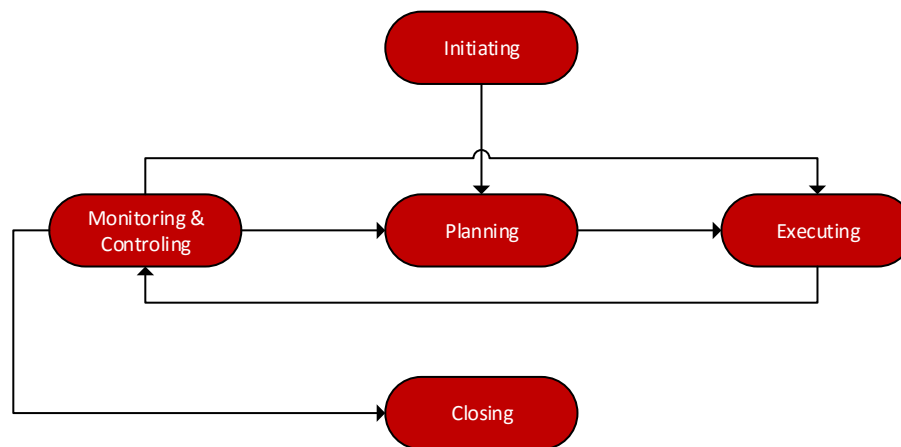
Initiation

Project Initiation is key to formulating a projects success by specifying what the project should accomplish. This section provides basic processes to get a project started. Initiation should ensure that the customer's needs are adequately articulated. Poorly formulated goals and objectives will lead to delays or total project failure. Initiation allows Enterprise Systems and its stakeholders to come to an agreement on project expectations and goals.

Initiation Guidelines

This section outlines general guidelines that should be used during initiation to define the overall parameters of the project. The following sections have been organized in a manner that represents how a project might progress through this process group.

The process steps for Project Initiation are:

| Project Idea | → | Complete Project Request Form | → | Review and Approve of Project Request | → | Project Prioritization & Scheduling | → | Project Lead Assigned & Project Charter Constructed | → | Project Charter Approved |

Process Step	Description	Process Input	Process Output	Owner	Resources
Complete Project Request Form	A formal project request form is created and submitted to Enterprise Systems.	Project Idea	Project Request Form	Project Sponsor	Project Request From & Enterprise Systems
Review and Approval of Project Request	The project request is reviewed in Enterprise Systems Associate Directors meeting. The request is reviewed to determine the impact/benefit to other areas and identify risks or concerns. Additional information or considerations might be requested/discussed with sponsor before moving forward as a result of this review.	Project Request & Additional information if needed	Approved Project Request	Enterprise Systems Associate Directors	Project Sponsor
Project Prioritization & Scheduling	Approved projects are scheduled out per the requested completion date. If conflicts are discovered Enterprise Systems will work with the Project Sponsor to resolve the conflicts. If competing priorities are identified and cannot be resolved Enterprise Systems will work with the Leadership and Advisory group to resolve the conflicts.	Approved Project Request, Scheduled Projects & Leadership and Advisory Group	Project is Scheduled	Enterprise Systems & Leadership and Advisory Group	
Project Lead Assigned & Project Charter Constructed	Approved projects are assigned to a project lead in Enterprise Systems weekly project team meeting. The project lead will work with the Project Sponsor & key Project Stakeholders to develop a Project Charter and get it approved.	Approved Project & Project Team	Project is assigned Project Lead	Enterprise Systems	
Project Charter Approved	Key Stakeholders approve the project charter and project moves to planning process.	Project Charter & Key Stakeholders	Approved Charter	Project Lead & Project Sponsor	

Complete Project Request Form

The Enterprise Systems Project Request Form provides an informal means of collecting a high-level overview of a proposed project.   It should be used to begin the initiation of the project. Typically, the Project Request Form will provide enough detail to be used as a basis in the creation of the Project Charter.

Review and Approval of Project Request

Enterprise Systems meets weekly to discuss and review projects. Once a Project Request form has been received, reviewed for completeness and discussed with the submitting party it is reviewed in Enterprise Systems Associate Directors meeting.   The request is reviewed to determine the impact/benefit to other areas and identify risks or concerns. This review can provide additional insight into project constraints, scope, risk and resources that will help in the project planning. Additional information or considerations might be requested/discussed with sponsor before moving forward as a result of this review.

Project Prioritization & Scheduling

Approved projects are scheduled out per the requested completion date. If conflicts are discovered Enterprise Systems will work with the Project Sponsor to resolve the conflicts. If competing priorities are identified and cannot be resolved Enterprise Systems will work with the Leadership and Advisory group to resolve the conflicts.

Project Lead Assigned & Project Charter Constructed

Approved projects are assigned to a project lead at Enterprise Systems weekly project team meeting. The project lead will work with the Project Sponsor & key Project Stakeholders to develop a Project Charter and get it approved.

A Project Charter is created during project initiation to formalize the scope, objectives, goals, stakeholders, roles and responsibilities. It ensures that all stakeholders have a firm understanding of and have agreed to the project goals and deliverables. The charter helps transition a project from initiation to planning.

The following is contained in the project charter:

> **Project Background** – The project background contains information on how the project came to fruition. It should include any related projects that have or may have led to the project. Identify individuals and areas of the university that have been involved and their role.
>
> The project background explains why the project was initiated. It provides everyone involved with a better understanding of how the project came to be. A clear understanding

of the background will help those involved define meaningful goals that will in turn lead to a successful project.

Project Goals – Goals associated with the project should be identified in this section. Each goal should, but is not required to align, with the requesting stakeholder's strategic plan, specific needs or objectives. Project goals should be specific, realistic, and attainable. The goals should be agreed upon prior to the project beginning. Please use SMART criteria when creating project goals and objectives.

- **Specific** – Well defined and clearly understood.
- **Measureable** – You can measure the result of your goal or objective and know when it has been accomplished.
- **Achievable** – You have the resources and time to accomplish the project goals and objectives.
- **Realistic** – Goals and objectives must fit within the broad project and be a reasonable way of proceeding. For instance a project goal may be achievable, but not realistic, if it is not aligned with business or organizational goals.
- **Time bound** – Goals and objectives must have a deadline, otherwise they will be continually deferred, delayed or denied.

Project Scope – The project scope should be a detailed description of what the project is and the benefits it will provide. It should utilize the project background and project goals to specifically identify the objectives that need to be accomplished in order to meet the project goals. These objectives should include a description of the work that needs to be accomplished. It should include when the work will begin and end, who will be involved in accomplishing this work and resources that will be needed to accomplish the work.

The project scope is important to clearly define what the project entails and ensure that it meets the goals and needs of the organization. A clearly defined scope ensures that all stakeholders have a good understanding of the project and what it will accomplish.

Project Risk – This section should include any know factors that could interfere or limit execution of the project. Identifying risks early on in the project can help determine how the project should proceed. It can help in developing realistic timelines or facilitate the decision making process early on in the project. It is important for all stakeholders to identify risks associated with the project.

Project Roles & Responsibilities – This section should clearly define stakeholder's roles and responsibilities for this project. It is important that a clear understanding and expectations are defined prior to the beginning of the project.

Signatures – Signatures provide a means for all key parties involved in the project to acknowledge that they have a firm understanding of the project and have agreed to the project goals and deliverables.

Signatures can be collected electronically through JIRA. Once a project is created in JIRA an issue of Project Charter can be added to it. The document can be attached to the issue and all of the key parties can be added as watchers. Then you can simple ask each of the key party members to review and respond back approving the Project Charter.

Project Charter Approved

Key Stakeholders approve the project charter and project moves to planning process.

Planning

Planning is considered the most important process group of the project. Identifying the projects business requirements, costs, resources, schedule and associating them with deliverables is key to avoiding confusion or possible rework of the project.

Without proper planning a projects success will be difficult to impossible. Stakeholders would have limited understanding of expectations, timelines, resource requirements, costs and key deliverables. By documenting these items in a project plan stakeholders are informed of their roles and responsibilities prior to the project moving forward. Stakeholders are then able to commit resources to specific timeframes and help meet deliver dates.

Planning Process

Engaging stakeholders in the planning process is important to creating a successful project plan. The project charter will provide a foundation for the project plan. The planning process involves the following steps:

| Project Initiation | → | Kickoff Meeting | → | Gather Project Requirements | → | Create Project Plan | → | Review & Approve Project Plan | → | Create Communication Plan |
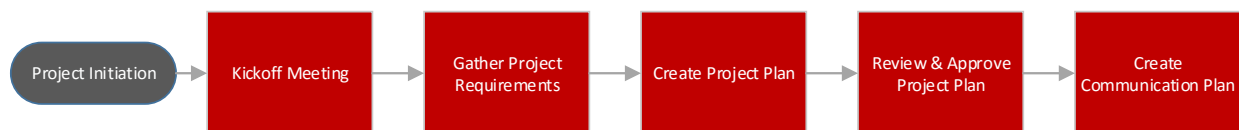
Process Step	Description	Process Input	Process Output	Owner	Resources
Kickoff Meeting	A formal kickoff meeting with all project participants will occur. Approved project charter is reviewed, change management process is reviewed, training on project management	Project Charter		Project Lead	

	software occurs and project process and expectations are discussed.				
Gather Project Requirements	The project charter will define high level goals that the project needs to accomplish. Using these goals, the project lead will work with the key stakeholders, to define the project's requirements.	Project Charter	Formal Project Requirements	Project Lead	Project Sponsor, Key Stakeholders & Confluence
Create Project Plan	Once the project requirements have been defined a project plan can be created. The project plan should include all tasks, sub-tasks, technical work, milestones, etc. to fulfill the project charters goals & the formally defined project requirements. The project plan should include work estimates and assigned resources.	Project Charter & Formal Project Requirements	Project Plan	Enterprise Systems & Leadership and Advisory Group	JIRA
Review & Approve Project Plan	The project lead and key stakeholders will review and approve the project plan to ensure that timelines, work estimates and resources are accurate and available.	Project Plan	Approved Project Plan	Project Lead & Project Sponsor	Project Agreement Form
Create Communications Plan	The project communication plan is created by the project team early in the project to indicate their agreement on how the team will communicate important information during the project such as: status, meetings, issues, deliverables access, and design/ document reviews. This plan also includes important communications to stakeholders and individuals that are not part of the project team. Some of the topics that should be considered for these types of updates are: status reports, web site updates, press releases, roll out plans, etc.	Approved Project Plan	Communication Plan	Project Lead & Project Sponsor	Communication Plan Template & Examples

Kickoff Meeting

A formal kickoff meeting with all project participants will occur. Approved project charter is reviewed, change management process is reviewed, training on project management software occurs and project process and expectations are discussed.

JIRA/Confluence Access and Training

Please ensure that access has been granted and individuals have been trained. Access and training should also be provided to anyone who will be working on the project. By providing access and training during planning you will help eliminate delays that could be caused if the project member did not have access or understand how to utilize the software.

Gather Project Requirements

The project charter will define high level goals that the project needs to accomplish. Using these goals, the project lead will work with the key stakeholders, to define the project's requirements.

Create Project Plan

The project plan forms the basis for all management efforts associated with the project. The plan should be as accurate and complete as possible when created knowing that changes will be made to the plan as it is executed.

Things to Consider When Constructing a Project Plan

"A Project Plan is a formal, approved document that is used to guide both project execution and project control," - PMI

The project plan forms the basis for all management efforts associated with the project. The plan should be as accurate and complete as possible when created knowing that changes will be made to the plan as it is executed.

Enterprise Systems utilizes JIRA & Confluence for project management. JIRA houses the project plans deliverables, milestones and tasks. JIRA is used to organize work and the communications around the work being performed. It also provides a record of the work completed and documents minor decisions around specific tasks. The project plan should be constructed within JIRA and reviewed with key stakeholders before executing the plan.

Confluence should be used to house project documentation specific to a project. This includes but is not limited to meeting notes, change requests, risk plans, resource plans, cost benefit analysis, and procurement plans. For many of the projects Enterprise Systems engages in the specified documentation is not required.

Please remember to:

- **Define and sequence the tasks to be performed and identify all deliverables associated with the project**. The deliverables should include all of the goals defined in the project charter. The deliverables of a project are usually project milestones.
- **Define the dependency relations between tasks**. The relationships can be defined within JIRA through subtasks and links.
- **Estimate the resources required to perform each task**. (Estimate each task's duration)
- **Schedule all tasks to be performed**.
- **Define the functional area(s) used to execute the project**. (Assign each task to the appropriate individual)
- **Identify the known risks in executing the project**. These risks should be discussed and project timelines should be adjusted accordingly.

Review & Approve Project Plan

The project lead and key stakeholders will review and approve the project plan to ensure that timelines, work estimates and resources are accurate and available. This can help eliminate conflicts that can occur from having a limited understanding of the project timeline, allocated resources, objectives and deliverables.

Create Communications Plan

The project communication plan is created by the project team early in the project to indicate their agreement on how the team will communicate important information during the project such as: status, meetings, issues, deliverables access, and design/ document reviews.   This plan also includes important communications to stakeholders and individuals that are not part of the project team. Some of the topics that should be considered for these types of updates are: status reports, web site updates, press releases, roll out plans, etc.

Execution, Controlling and Monitoring

When a project enters the execution process group all necessary team members have been identified, resources have been allocated and goals and objectives have been established. The project plan should be completed based on the goals, objectives and resources agreed upon during initiation and planning. All tasks within the project plan should be assigned out, have a due date and time estimates.

The PMBOK® defines Project Control with the following statement:

"A project management function that involves comparing actual performance with planned performance and taking appropriate corrective action (or directing others to take this action) that will yield the desired outcome in the project when significant differences exist."

Project Control involves the regular review of the project plan to identify variances or delays that can affect the execution and completion of the project. When a significant variance is identified adjustments to the project plan may be required. Even if an adjustment is not required the variance should be discussed with key stakeholders.

Execution, Controlling and Monitoring Processes

The process of executing, controlling and monitoring the project plan will help ensure that the project is completed on time and meets the specified goals. The execution, controlling and monitoring processes involve the following steps:
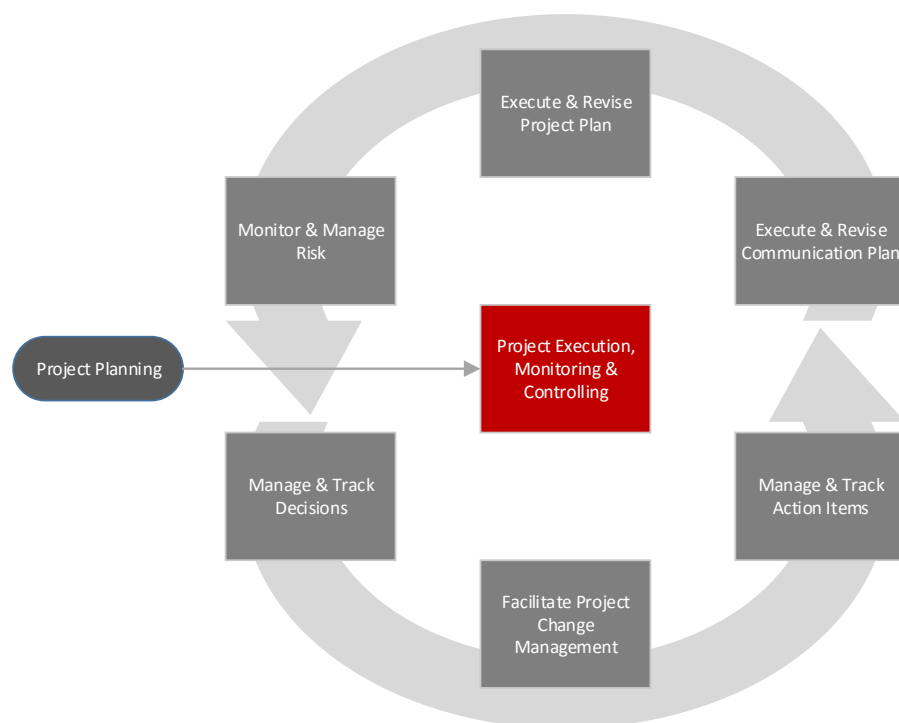
Process Step	Description	Process Input	Process Output	Owner	Resources
Manage & Track Decisions	Project Leads in conjunction with the Project Manager are responsible for helping facilitate decisions	Project Team Meetings & Stakeholders Meetings	Confluence Decision Document & Decision	Project Lead	Confluence Decision Document

	before they impact the project. When a decision is made the following should be recorded: What needs to be decided, stakeholders, outcome, due date, background and any action items as a result of the decision. Not all decisions need to be tracked.				
Facilitate Project Change Management	Significate changes need to be tracked and documented. Significate changes include changes to the project scope, budget, schedule/plan, quality of the results, or changes in resources.	Project Change Request Form	Project Change	Project Lead & Project Sponsor	Change Request Form & Confluence
Manage & Track Action Items	The Project Lead is responsible for ensuring that tasks too small to appear in the project plan are scheduled, recorded and completed.	Meetings	Confluence Space Action Items	Project Lead	Confluence
Execute & Revise Communication Plan	As the project plan is executed the communication plan will be implemented. Project milestones, tasks, sub-tasks, etc. may require revision. Changes to the communication plan may be required to incorporate or eliminate project communications.	Communication Plan	Revised Project Communication Plan	Project Lead & Project Stakeholders	
Execute & Revise Project Plan	Keep the project plan up to date with statuses on tasks, project revisions, project additions or project changes.	Project Meetings, Change Requests, Issue Status & Work Logs	Updated Project Plan	Project Lead & Project Stakeholders	Confluence, JIRA & Project Change Request
Monitor & Manage Risk	Risks are identified through reporting, meetings and project execution. As risks arise they should be dealt with quickly through decisions and project changes if necessary.	Weekly/Monthly Reporting & Project Meetings, Project Execution	Change Request, Updated Project Plan, Project Decisions	Project Lead & Project Stakeholders	Confluence, JIRA, Project & Confluence Decision Document, Change Request

Manage & Track Decisions

Project Leads in conjunction with the Project Manager are responsible for helping facilitate decisions before they impact the project. When a decision is made the following should be recorded: What needs to be decided, stakeholders, outcome, due date, background and any action items as a result of the decision. Major decisions that affect the project timeline, quality, cost or outcome should be documented in the confluence project space using the decision template. Not all decisions need to be tracked in this manner. Minor decisions can be recorded in project meeting notes.

Facilitate Project Change Management

Significate changes need to be tracked and documented. Significate changes include changes to the project scope, budget, schedule/plan, quality of the results, or changes in resource. These changes should be recorded in Confluence and JIRA. When recording changes please include:

- Change Type
- Change Reason
- Impact of Change
- Business Problem the Change Will Resolve
- Alternatives Considered & Impact of Not Implementing Change
- Reason for Choosing this Solution
- Project Impact & Risk
- Requirements
- Any Associated Costs

The change management form is a great resource for ensuring that all relevant information is documented on project changes.

Manage & Track Action Items

In addition to the issues tracked in the project plan, there are action items that will be generated. Tasks in the project plan never seem to cover all the work needed, and the action items need to be tracked to make sure they are completed. Any number of activities on a project can generate action items.

> **Action items**: Work to be done by a few resources that should be completed in a week or less. This work is too small to be captured in the project plan. Action items will not cause delays or the need for a new baseline.

The Project Lead is responsible for ensuring that action items are scheduled, recorded and completed. These action items should be recorded, tracked and documented in meeting notes within Confluence.

Execute & Revise Communication Plan

As the project plan is executed the communication plan will be implemented. Project milestones, tasks, sub-tasks, etc. may require revision. Changes to the communication plan may be required to incorporate or eliminate project communications. These changes should be discussed and documented during project meetings. The notes for these meeting should be stored in Confluence.

Execute & Revise Project Plan

Executing the project plan ensures that milestones, objectives and tasks are carried out in an effective and efficient manner while meeting the goals of the project. Project execution relies heavily on the plans developed during planning.   Proper monitoring of the execution of the plan will allow the actual performance to be compared to planned performance. This monitoring will also allow risk, scope and quality to be monitored and controlled. Controlling the project will ensure that the agreed upon goals and objectives are met.

Regular project meetings should be held with the project team to review and monitor the project plan. By discussing progress often items that could delay or derail project tasks can be identified and resolved.

Status Reporting

During execution status reviews and status reports are an important means of monitoring progress. Status reviews and reports provide an open and transparent way for stakeholders to review the projects progress, acknowledge/approve completed milestones and objectives. Status reviews can be added to regular meetings that Enterprise Systems has and will be requested at time by our administration.   It is helpful to identify key stakeholders that you would like to update on a regular basis and ensure that they receive status updates that are meaningful and helpful to them. (This should be done in the communication plan.) Status reporting, as a minimum, should be done in the following manner:

- JIRA projects should be kept up-to-date. This requires individuals working on the project to regularly post comments and track the work they have completed.
- Utilize the report template in the appendix to generate the report in Confluence. You can use the Confluence JIRA report as a basis for your report.
- Report on projects in your regular meetings that our occurring with key project stakeholders.

Monitor & Manage Risk

Risk identification, monitoring and resolution are key to executing a successful project. Risk monitoring began in project initiation and was also part of planning. The sooner project risks can be identified and resolved the better the chance of the project succeeding.

During execution risks are more tangible and identifiable. Creating specific tasks that can be tracked to resolve the identified risks should be part of your monitoring activities. Please use the following steps in managing risk:

- Identify the risk.
- Develop a plan or plans to resolve the risk.
- Discuss plan(s) with key stake holders and agree on a resolution.
- Implement resolution as part of the project plan and monitor.
- Continue to discuss risk in key stakeholder's meetings.

Additional Information on Controlling / Monitoring

Scope Control

Scope Control involves the process of identifying and managing all elements that may increase or decrease the project's scope beyond that defined and agreed upon in the original project planning. Scope control consists of determining when scope changes have occurred and managing the changes.

Scope changes normally require additional resources, time or money. They can dramatically affect the project plan and its specified timeline. When scope changes are identified it is important to quickly address them with key stakeholders. A decision should be made on how to address the change and changes to the project plan should be made.

Risk Control

Risk control involves executing plans developed from identifying risk during the monitoring. This will occur throughout the duration of the project. When changes are identified due to risk the following steps should be followed:

- Identify the actual risk - some of the identified risks will occur; others will not occur.
- Qualify/quantify - as risks are qualified and quantified actual risk events must be separated from the sources of risk.
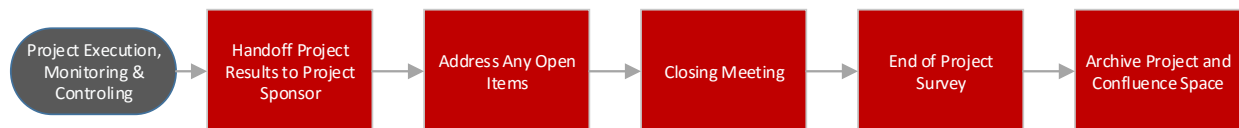- Respond - the response for the risk should be appropriate for the risk.

It is important to remember that you cannot identify all risks. Workarounds maybe required to complete the project on time. Workarounds are often considered short-term solutions that should be addressed with a workable long-term solution.

Quality Control

Quality control involves monitoring specific project results (Milestones) to determine if they meet agreed upon goals and objectives. This will help identifying ways to eliminate unsatisfactory results and ensure that the project meets the desired standard. Quality control should be performed throughout the project. It is important to remember **Prevention** (keeping errors from occurring) and **Inspection** (keeping errors out of the hands of the customers). This will help ensure that quality results are delivered to the key stakeholders.

Closing

Closing out a project occurs when all of the defined project objectives have been met and the customer has accepted the results of the project. Not all project closure activities need to occur at the end of the project. As each project milestone is completed it should be reviewed with key stakeholders to ensure that it meets the expectations that were agreed upon.

```
Project Execution,    →  Handoff Project    →  Address Any Open  →  Closing Meeting  →  End of Project  →  Archive Project and
Monitoring &             Results to Project     Items                                   Survey             Confluence Space
Controling               Sponsor
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Process Step	Description	Process Input	Process Output	Owner	Resources
Handoff Project Results to Project Sponsor	Project results are officially handed off to project sponsor and they accept the project results as meeting their specified needs.	Project Results & Project Completion Agreement Form	Acceptance of Work	Project Lead	Project Completion Agreement Form
Address Any Open Items	During the project decisions might be made to hold or defer items to a later time. These may be migrated into an additional project or dropped all together. A specific course of action for these items should be determined prior to closing out the project.	List of Open Items	Determined Course of Action for Open Items	Project Lead	
Closing Meeting	The closing meeting will allow the project team, project participants and leadership to ensure that there are no outstanding	Meeting	Lessons Learned Document	Project Lead	Confluence & Lessons Learned Document

	issues or work. This will also provide a forum to review lessons learned throughout the project and encourage survey participation.				
End of Project Survey	In order to continually improve our team and processes, an end of project survey is sent out to all individuals who participated on the project.	Survey	Survey Results	Project Lead	
Archive Project and Confluence Space	When the project is officially closed the JIRA project and Confluence Space are archived. A copy of the confluence space is provided to the project sponsor if they so desire.	JIRA Project & Confluence Space	Archive File	Project Manager	Confluence & JIRA

Handoff Project Results to Project Sponsor

Project results are officially handed off to project sponsor and they accept the project results as meeting their specified needs. A formal meeting should take place. The project lead is responsible for facilitating this meeting and having the project sponsor(s) signoff on the project completion agreement.

It is important that the project sponsor(s) agree to the completion of the project. If there are lingering tasks or the deliverables do not meet the project goals, steps need to be taken to rectify the issues. Regular project meetings and status updates should help prevent any issues at the after the project is deemed complete.

Address Any Open Items

During the project, decisions might be made to hold or defer items to a later time. These may be migrated into an additional project or dropped all together. A specific course of action for these items should be determined prior to closing out the project.

These decisions will be documented during the project and during the closing meeting should be discussed as an agenda item. The open items or deferred items should be compiled by the project lead into a readable format. This will make it easier for all parties to understand and make appropriate decisions on.

Closing Meeting

The closing meeting will allow the project team, project participants and leadership to ensure that there are no outstanding issues or work. This will also provide a forum to review lessons learned throughout the project and encourage survey participation.

Project Closing

In order to continually improve our team and processes, an end of project survey is sent out to all individuals who participated on the project. The project lead will work with the project manager to get the survey setup and sent out.

Archive Project and Confluence Space

When the project is officially closed the JIRA project and Confluence Space are archived. A copy of the project and confluence space is provided to the project sponsor if they so desire.

Appendix

The appendix houses documents that can be used throughout the project.

Enterprise Systems Project Request Form

Requesting Department:

Submitted By: Date:

Desired Start Date: Desired Delivery Date:

Project Title:

☐ **Check this box if the project is mandated by a federal, state, or other regulatory office.**

Instructions

The purpose of this form is to provide the Enterprise Systems with enough understanding about a project so proper decisions, recommendations, internal and external coordination can take place to move the project forward. Please use your discretion when answering the questions below.

Project Sponsors

Name/Title	Email	Phone

Project Description

Provide a simple, high-level description of the project. It should clearly state the overall business goal of the initiative. If the description is highly technical or utilizes acronyms, please provide a one paragraph summary in layman's terms of the project.

Project Justification

A simple, high-level description of the benefits the project will provide. This might include items such as costs savings or service improvements. Include the types and numbers of affected customers.

Project Dependency

Provide a list of any components, systems, or other reliance that needs to be involved in this project. Please include the type of impact this will have on your project.

Project Measures

Provide the measures you will put in place to determine whether this project was a success.

Does this project support a University, Campus, or Department strategic plan?

If you answered yes, please explain how.

Resource Requirement

To the best of your ability, estimate the costs of this project in material costs and labor hours for both initial expenditure/purchase and recurring maintenance.

Labor			
Resource Type (Role)	Department/Campus	Estimated Hours	Description of Work
Total Hours:			

Other Costs			
Cost Type	One-Time Costs	Recurring Cost Per Year	Explanation
Sum:			
Total Cost:			

Enterprise Systems Project Charter

Project Name:

Project Lead: Date:

Project Background

This section contains information about how the project came to fruition. Include any related projects that have or may have led to the project. Identify individuals and areas of the university that have been involved and their role.

Project Goals

This section defines the project's goals and how they relate to the requesting stakeholders strategic plan, specific needs or objectives.

Project Goal	Requesting stakeholder's strategic plan…

Project Scope

Please provide a detailed description of the project. The project scope should build off of the project background and project goals. It should describe the benefits of the project and specifically identify the work that needs to be done to accomplish the project. Please include when the work will begin and end, who will be involved in accomplishing this work and resources that will be needed to accomplish the work.

Project Risk

This section should include any known factors that could interfere or limit execution of the project.

Project Roles & Responsibilities

This section should identify individuals, departments, stakeholders or other individuals/entities involved in the project. Please include their role in the project and any specific responsibilities they have in the project.

Signatures

By signing this charter, you agree to the scope, objectives, goals, roles and responsibilities identified in this document. Once the proper signatures have been gathered work can begin on the project plan.

Name/Title	Signature	Date

Enterprise Systems Project Agreement

Project Name:

Project Lead: Date:

Signatures

By signing this agreement, you agree to the scope, objectives, goals, roles and responsibilities outlined within the project plan. Once the proper signatures have been gathered work can begin on the project.

Name/Title	Signature	Date

Enterprise Systems Project Communication Plan

The Project Communication plan is created by the project lead with the project team early in project. It is used to designate who and how the team will communicate important information during the project. It should include project status, meetings, issues, deliverables access, and design/document reviews. It is recommended that this plan is completed prior to the execution process of the project. The following is a list of communication activities to consider. Your plan should not be limited to these examples.

What	Who / Target	Purpose	When / Frequency	Type / Method
Project Kick-off Meeting	All stakeholders.	The main goal of the project kick-off meeting is to familiarize the project team with the project, review the project charter and receive buy-in from all project participants. The change management process is reviewed, training on project management software occurs and project process and expectations are discussed. Future meetings can be scheduled and discussed. Meeting minutes will be documented in Confluence.	At the end of Project Initiation and beginning of Project Planning.	Meeting
Status Meeting	Entire project team.	To review detailed plans: Tasks, Assignments, Action items, Change Requests	Regularly Scheduled meeting. Weekly is recommended for entire team.	Meeting with standardized agenda and minutes lead by the project lead.
Project Sponsors Meetings	Sponsor(s) and Project Manager	Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.	Regularly scheduled. Recommended biweekly or monthly. It can be scheduled as needed when issues cannot be resolved or changes need to be discussed.	Meeting (Leadership and Advisory Group)
Create beta testers group	Targeted application users	Invite specific key application users on campus to participate in the development of the application.	Regularly scheduled meeting to present the product changes, have users test and receive feedback.	Meeting
Develop Use Cases	Users of application	Construct use cases with the application users to help ensure that requirements are correct and testing processes can be developed	As needed during the project to help refine requirements and ensure nothing is missing	Meeting

What	Who / Target	Purpose	When / Frequency	Type / Method
Communication To Campus Application Users	Users of application	Inform users of the changes to the existing application	Two weeks before implementation; Two days before implementation	Targeted email communication to users
Periodic Demos and Target Presentations	Specific Focus Groups, End Users or Key Stakeholders	To gain input from specific groups and keep them informed of the Project's status.	As needed to demonstrate functionality and receive feedback in a timely manner	Presentation and Discussion
General information to campus about upcoming changes	Campus	Communicate general information to campus about coming changes	Two months before implementation about changes; Two weeks before changes are implemented; Two days before implementation	Mass email to campus / WSU announcements
FAQ	Users of application; Campus	Document and communicate Frequently Asked Questions about the application changes	Two months before implementation; Updated bi-weekly as new questions are received.	Web Page
Executive Oversight or Steering Committee Meetings (this may apply only to larger projects)	Executive Sponsor(s) and Project Manager	Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.	Regularly scheduled. Recommended monthly or quarterly. As needed when issues cannot be resolved or changes need to be made to Project Plan.	Meeting with standardized agenda and minutes.
Project Closing Meeting	Project Lead, Project team, key stakeholders, and sponsor(s)	Conducting the post project review meeting will allow the project team and the customer project participants and leadership to gather one last time to ensure that there are no outstanding issues or work. This will also provide a forum to review lessons learned throughout the project. Project participants will also be asked to complete our end of project survey.	End of project or end of major phase	Meeting with standardized agenda and minutes.

Enterprise Systems Project Status Report

Project Name:

Project Lead: Report Date:

Current Project Status

This section should include the overall status of the project. It should include any issues that need to be resolved, decisions that need to be made and overall health of the project.

Significant Project Accomplishments

This section should include significant accomplishments that have been completed since the last project report. They should focus on milestones and project objectives.

Open Action Items

This section should include any outstanding items that need to be resolved to keep the project moving forward. This could be business decisions, policy decisions, configuration decisions or any other type of item that requires action.

Milestone Status

Describes project milestone status and deliverables within the reporting period.

Upcoming deliverables status:

Completed deliverables since last review:

Technical Update, Status

Discusses any technical issues at this point in the project.

Risk Update, Status

Covers any risk status/issues since the last status report.

Enterprise Systems Project Change Request Form

Request Title:

Submitted By: Date:

Project Name: Project Lead:

Requesting Dept.:

Change Type

Please select one of the options below.

Project Budget	Project Quality	Project Schedule/Plan	Project Scope	Design Change	Requirement Change	New Requirement	Other

If you selected other, please explain:

Change Reason

Please select one of the options below.

Customer Request	Legal	Regulatory	Performance	Other

If you selected other, please explain:

Change Impact

Please select one of the options below.

Critical – Project cannot successfully move forward without this change	Necessary – Change is required but will not delay the project at this time	Optional – Project can successfully complete without this change

Business Problem

Please describe the business problem this change will resolve.

Impact of NOT Implementing the Change, and Alternatives

Please describe the impact of not implementing this change as well as any alternative solutions.

Reason for Choosing this Solution

Please provide detailed reason for choosing this solution over other alternative.

Project Impact & Risk

Please describe the impact this change will have on the project and any project risks it will generate.

Requirements

Please provide detailed requirements for the requested change.

Costs

Please provide detailed list of associated costs this change will incur.

Internal Use

Date Change Was Reviewed:

Decision:

Approved	Approved with Conditions	Denied	Future Enhancement
Notes:			

Signatures:

Name/Title	Signature	Date

Enterprise Systems Project Completion Agreement

Project Name:

Project Lead: Date:

Signatures

By signing this agreement, you agree that the project listed above has been completed to the specified requirements defined in the project charter and project plan.

Name/Title	Signature	Date

Enterprise Systems Project Completion Lessons Learned

Project Name:

Project Lead: Date:

Project Successes

List of project successes big and small and what lead to those successes on this project.

Description	Factors that Prompted this Success

Potential Improvements

List of project areas that did not go well and could be improved upon. Please provide any insights / strategies you might have into making these improvements.

Description	Factors that may have led to this	Insights / Strategies

Additional Feedback

Any additional feedback provided.