

Major steps in a project (life cycle):

(documents in **bold**)

- 1) Initiating (Pre-project setup)
 - a. Identify project
 - b. Validate project
 - i. **Business case document**
 1. May include high-level estimated budgets and timelines and feasibility study
 - c. Write **project charter**
 - i. **High-level requirements (product description) document**
 - d. Get project charter approved
- 2) Planning
 - a. Kick-off meeting
 - b. **Scope Planning**
 - i. **Scope-management plan**
 - ii. **Scope statement**
 - iii. **Work breakdown structure (WBS)**
 1. **WBS dictionary**
 - c. **Project schedule / Schedule baseline**
 - i. Define activities by breaking down WBS further to help determine times and dates
 - ii. Activity sequencing and network diagram
 - iii. Activity duration estimating
 - iv. Schedule development
 - v. Sign-off by stakeholders and functional managers who are supplying resources to ensure commitment
 - d. Communications Planning
 - i. **Communications plan**
 - ii. **Resource requirements document** = tells required resources for each work package in WBS
 - iii. **Resource pool description** = list of all the job titles within your company.
 - iv. **Responsibility assignment matrix (RAM)**
 1. **RACI chart**
 - e. Human Resources Planning
 - i. Organizational planning
 - ii. Staff acquisition
 - iii. **Roles and responsibilities document** = lists team members & their responsibilities
 - iv. **Staffing management plan**
 - f. Procurement Planning
 - i. **statement of work (SOW)** details the goods or services you want to procure.
 - ii. **procurement document** = to notify prospective sellers of upcoming work
 - g. Cost estimating & Budgeting
 - h. Quality Planning
 - i. **Quality management plan**
 - i. Risk Planning

- i. **Risk register**
 - j. **Project Management Plan** sign-off
 - k. **Transition plan** describes how product is transitioned to the organization
 - 3) Executing
 - a. Project Kick-off meeting
 - b. States of team development
 - i. forming, storming, norming, performing, and adjourning.
 - 4) Monitoring and Controlling
 - 5) Closing
 - a. Steps
 - i. obtaining sign-off and acceptance,
 - ii. transferring the product to the organization,
 - iii. releasing project resources,
 - iv. closing out contracts,
 - v. performing Administrative Closure,
 - vi. documenting historical information,
 - vii. conducting post-mortem analysis, and
 - viii. conducting post-project reviews.
 - b. Main phases:
 - i. Contract Closeout
 - ii. Administrative Closure
 - c. **Lessons learned document**
 - d. **project close report**