

Grupos de Procesos de la Gerencia de Proyectos: caso de estudio

Objetivos

- Describir los cinco grupos de procesos de la gerencia de proyectos, el nivel típico de actividad de cada uno y las interacciones entre ellos
- Entender como los grupos de procesos de la gerencia de proyectos se relacionan con las áreas de conocimiento de la gerencia de proyectos
- Discutir como las organizaciones desarrollan metodologías de gerencia de proyectos de tecnologías de información (TI) para satisfacer sus necesidades

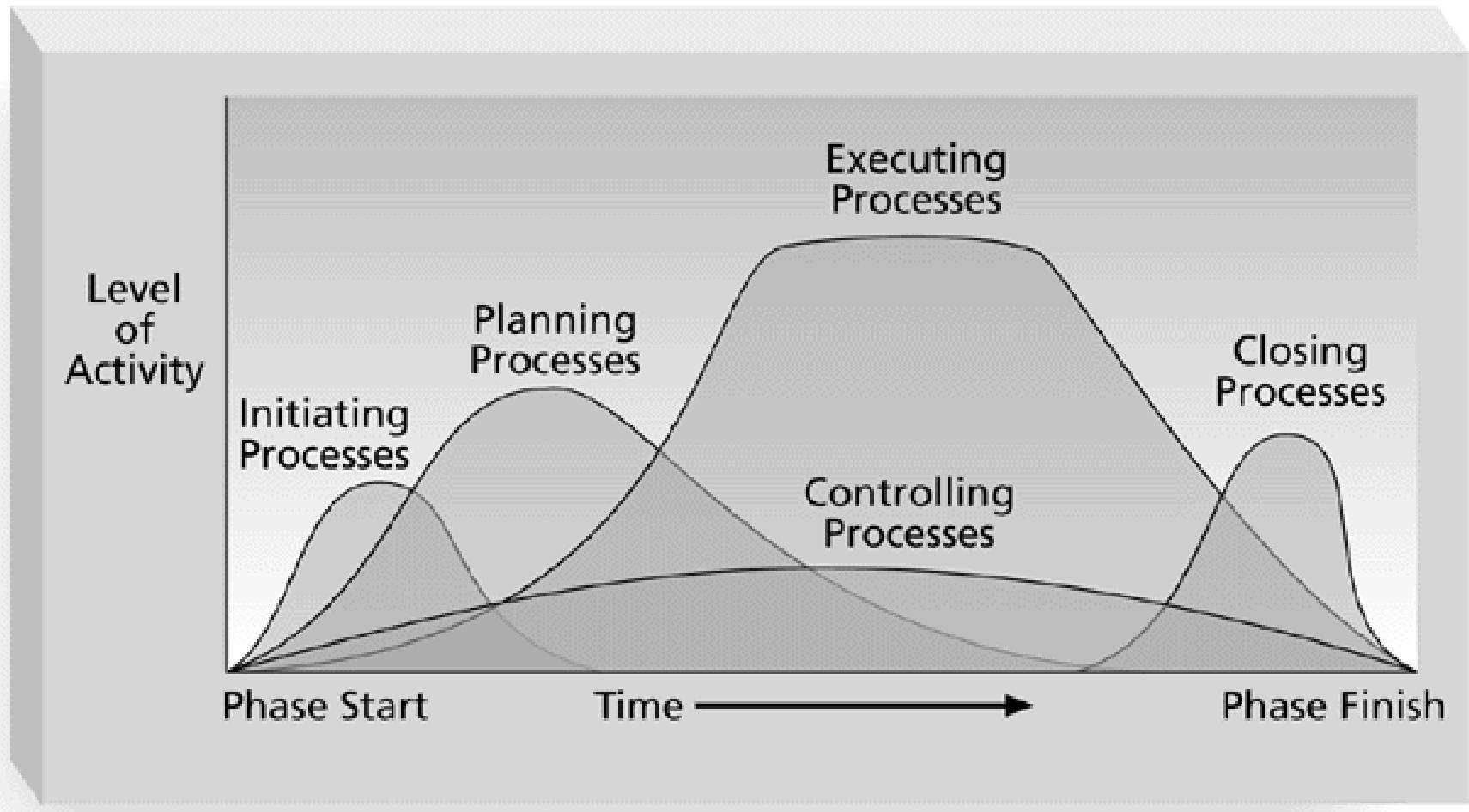
Objetivos

- Revisar el caso de estudio de una aplicación de los grupos de procesos de la gerencia de proyectos para gestionar un proyecto de TI en una organización
- Entender como la aplicación efectiva de las etapas de iniciación, planeación, ejecución, control y cierre contribuyen al éxito de un proyecto

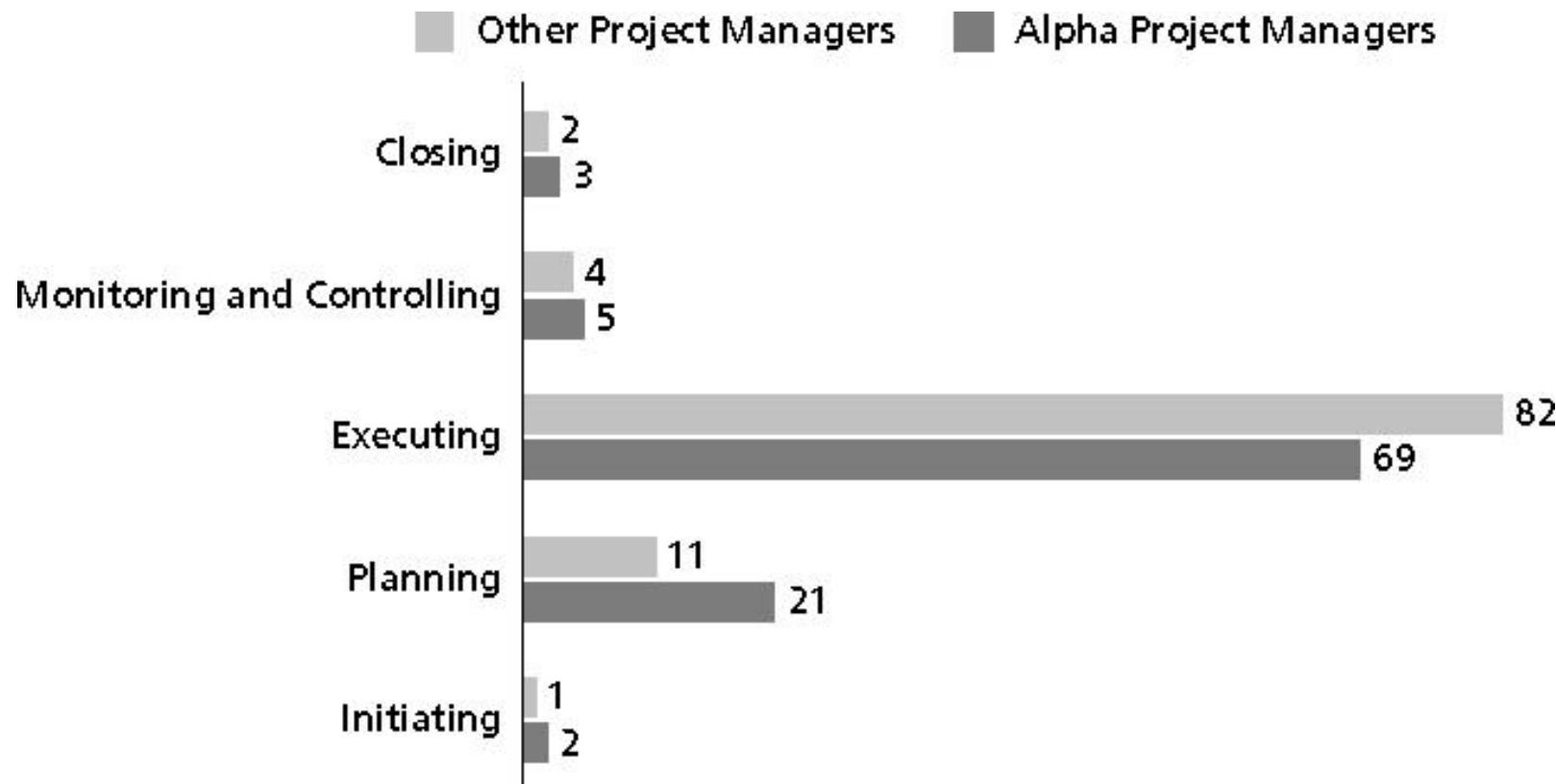
Grupos de Procesos de la Gerencia de Proyectos

- La gerencia de proyectos puede ser vista como un número de procesos interconectados
- Grupos de procesos de la gerencia de proyectos:
 - Procesos de iniciación
 - Procesos de planeación
 - Procesos de ejecución
 - Procesos de control
 - Procesos de cierre

Traslapo de los Grupos de Procesos en una Fase



Porcentaje de tiempo invertido en cada Grupo de Procesos



Grupos de procesos de gerencia vs áreas de conocimiento

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
<i>Project Integration Management</i>	Develop project charter	Develop project management plan	Direct and manage project execution	Monitor and control project work, Perform integrated change control	Close project or phase
<i>Project Scope Management</i>		Collect requirements, Define scope, Create WBS		Verify scope, Control scope	
<i>Project Time Management</i>		Define activities, Sequence activities,		Control schedule	

Grupos de procesos de gerencia vs áreas de conocimiento (cont)

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
<i>Project Time Management (continued)</i>		Estimate activity resources, Estimate activity durations, Develop schedule			
<i>Project Cost Management</i>		Estimate costs, Determine budget		Control costs	
<i>Project Quality Management</i>	Plan quality		Perform quality assurance	Perform quality control	
<i>Project Human Resource Management</i>	Develop human resource plan		Acquire project team, Develop project team, Manage project team		

Grupos de procesos de Gerencia vs áreas de conocimiento (cont)

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
<i>Project Communications Management</i>	Identify stakeholders	Plan communications	Distribute information, Manage stakeholders expectations	Report performance	
<i>Project Risk Management</i>		Plan risk management, Identify risks, Perform qualitative risk analysis, Perform quantitative risk analysis, Plan risk responses		Monitor and control risks	
<i>Project Procurement Management</i>		Plan procurements	Conduct procurements	Administer procurements	Close procurements

Desarrollando una metodología de Gerencia de Proyectos de IT

- Así como los proyectos son únicos, los enfoques gerenciales son únicos
- Muchas organizaciones desarrollan sus propias metodologías
- Metodología describe COMO las cosas deben hacerse; un standard describe QUE debe hacerse
- PRINCE2, Agile, RUP, and Six Sigma proveen diferentes metodologías de gerencia de proyectos

Case Study: JWD Consulting's Project Management Intranet Site

- Ejemplo de qué se debe considerar en los grupos de procesos de la gerencia de proyectos de TI

Documento de Iniciación del Proyecto

- Nota: Cada organización tiene sus propias variaciones de los documentos que son requeridos para la iniciación del proyecto. Es importante identificar la necesidad, los stakeholders (interesados) y los principales objetivos del proyecto

Salidas de la Pre- Iniciación del Proyecto

- Proveer las bases antes de oficializar el proyecto
- La Alta Gerencia:
 - Determinar restricciones de alcance, tiempo, costos
 - Escoge el gerente de proyecto
 - Desarrolla el caso de negocio
 - Revisar expectativas de la gerencia del proyecto
 - Determina si el proyecto debe subdivirse o no

Caso de Negocio JWD Consultores

- Introducción/antecedentes
- Objetivos del negocio
- Situación actual y descripción del problema/oportunidad
- Supuestos y restricciones críticas
- Análisis de opciones y recomendaciones
- Requerimientos preliminares del proyecto
- Presupuesto estimado y análisis financiero
- Cronograma estimado
- Riesgos potenciales

Caso de Negocio JWD Consultores

1.0 INTRODUCTION/ BACKGROUND

JWD Consulting's core business goal is to provide world-class project management consulting services to various organizations. The CEO, Joe Fleming, believes it can strengthen operations and increase business by providing information related to project management on its intranet site, making some information and services accessible to current and potential clients.

2.0 BUSINESS OBJECTIVE

JWD Consulting's strategic goals include continuing growth and profitability. The Project Management Intranet Site project will support these goals by increasing visibility of the firm's expertise to current and potential clients by allowing client and public access to some sections of the intranet. It will also improve profitability by reducing internal costs by providing standard tools, techniques, templates, and project management knowledge to all internal consultants. Since JWD Consulting focuses on identifying profitable projects and measuring their value after completion, this project must meet those criteria.

Caso de Negocio JWD Consultores (Continuación)

3.0 CURRENT SITUATION AND PROBLEM/OPPORTUNITY STATEMENT

JWD Consulting has a corporate Web site as well as an intranet. The firm currently uses the Web site for marketing information. The primary use of the intranet is for human resource information, such as where consultants enter their hours on various projects, change and view their benefits information, access an online directory and Web-based e-mail system, and so on. The firm also uses an enterprise-wide project management system to track all project information, focusing on the status of deliverables and meeting scope, time, and cost goals. There is an opportunity to provide a new section on the intranet dedicated to sharing consultants' project management knowledge across the organization. JWD Consulting only hires experienced consultants and gives them freedom to manage projects as they see fit. However, as the business grows and projects become more complex, even experienced project managers are looking for suggestions on how to work more effectively.

4.0 CRITICAL ASSUMPTION AND CONSTRAINTS

The proposed intranet site must be a valuable asset for JWD Consulting. Current consultants and clients must actively support the project and it must pay for itself within one year by reducing internal operating costs and generating new business. The Project Management Office manager must lead the effort, and the project team must include participants from several parts of the company, as well as current client organizations. The new system must run on existing hardware and software, and it should require minimal technical support. It must be easily accessible by clients and the public yet secure from unauthorized users.

Caso de Negocio JWD Consultores (Continuación)

5.0 ANALYSIS OF OPTIONS AND RECOMMENDATION

There are three options for addressing this opportunity:

1. Do nothing. The business is doing well, and we can continue to operate without this new project.
2. Purchase access to specialized software to support this new capability with little in-house development.
3. Design and implement the new intranet capabilities in-house using mostly existing hardware and software.

Based on discussions with stakeholders, we believe that option 3 is the best option.

Caso de Negocio JWD Consultores (Continuación)

6.0 PRELIMINARY PROJECT REQUIREMENTS

The main features of the project management intranet site include the following:

1. Access to several project management templates and tools. Users must be able to search for templates and tools, read instructions on using these templates and tools and see examples of how to apply them to real projects. Users must also be able to submit new templates and tools, which should be first screened or edited by the Project Management Office before being added to the intranet site.
2. Access to relevant project management articles. Many consultants and clients feel as though there is an information overload when they research project management information. They often waste time they should be spending with their clients. The new intranet should include access to several important articles on various project management topics, which are searchable by topic, and allow users to request the Project Management Office staff to find additional articles to meet their needs.
3. Links to other, up-to-date Web sites, with brief descriptions of the main features of the external site.
4. An "Ask the Expert" feature to help build relationships with current and future clients and share knowledge with internal consultants.
5. Appropriate security to make the entire intranet site accessible to internal consultants and certain sections accessible to others.
6. Ability to charge money for access to some information. Some of the information and features of the intranet site should prompt external users to pay for the information or service. Payment options should include a credit card option or similar online payment transactions. After the system verifies payment the user should be able to access or download the desired information.
7. Other features suggested by users, if they add value to the business.

Caso de Negocio JWD Consultores (Continuación)

7.0 BUDGET ESTIMATE AND FINANCIAL ANALYSIS

A preliminary estimate of the cost for the entire project is \$140,000. This estimate is based on the project manager working about 20 hours per week for six months and other internal staff working a total of about 60 hours per week for six months. The customer representatives would not be paid for their assistance. A staff project manager would earn \$50 per hour. The hourly rate for the other project team members would be \$70 per hour since some hours normally billed to clients may be needed for this project. The initial cost estimate also includes \$10,000 for purchasing software and services from suppliers. After the project is completed, maintenance costs of \$40,000 are included for each year, primarily to update the information and coordinate the "Ask the Expert" and article retrieval features.

Projected benefits are based on a reduction in hours consultants spend researching project management information, appropriate tools and templates, and so on. Projected benefits are also based on a small increase in profits due to new business generated by this project. If each of more than 400 consultants saved just 40 hours each year in profits, then the projected benefit would be \$160,000 per year. If the new intranet increased business by just 1 percent, using past profit information, increased profits due to new business would be at least \$40,000 each year. Total projected benefits, therefore, are about \$200,000 per year.

Exhibit A summarizes the projected costs and benefits and shows the estimated net present value (NPV), return on investment (ROI) and year in which payback occurs. It also lists assumptions made in performing this preliminary financial analysis. All of the financial estimates are very encouraging. The estimated payback is within one year, as requested by the sponsor. The NPV is \$272,800, and the discounted ROI based on a three-year system life is excellent at 112 percent.

Caso de Negocio JWD Consultores (Continuación)

8.0 SCHEDULE ESTIMATE

The sponsor would like to see the project completed within six months, but there is some flexibility in the schedule. We also assume that the new system will have a useful life of at least three years.

9.0 POTENTIAL RISKS

There are several risks involved with this project. The foremost risk is a lack of interest in the new system by our internal consultants and external clients. User inputs are crucial for populating information into this system and realizing the potential benefits from using the system. There are some technical risks in choosing the type of software used to search the system, check security, process payments, and so on, but the features of this system all use proven technologies. The main business risk is investing the time and money into this project and not realizing the projected benefits.

Caso de Negocio JWD Consultores (Continuación)

10.0 EXHIBITS

Exhibit A: Financial Analysis for Project Management Intranet Site Project

Discount rate	8%				
	Year				
Assume project done in about 6 mos.	0	1	2	3	Total
Costs	140,000	40,000	40,000	40,000	
Discount factor	1	0.93	0.86	0.79	
Discounted costs	140,000	37,200	34,400	31,600	243,200
Benefits		200,000	200,000	200,000	
Discount factor		0.93	0.86	0.79	
Discounted benefits		186,000	172,000	158,000	516,000
Discounted benefits - costs	(140,000)	148,800	137,600	126,400	
Cumulative benefits - costs	(140,000)	8,800	146,400	272,800	<---NPV
Payback in year 1					
Discounted life cycle ROI----->	112%				
Assumptions					
Costs	# hours	\$/hour			
PM	500	50	25,000		
Staff	1500	70	105,000		
Outsourced software and services	10,000				
Total projected costs			140,000		
Benefits					
# consultants	400				
Hours saved	40				
\$/hour profit	10				
Benefits from saving time	160,000				
Benefits from 1% increase in profits	40,000				
Total annual projected benefits	200,000				

Iniciación

- Incluye reconocer e iniciar un nuevo proyecto o fase
- El propósito es FORMALMENTE seleccionar e iniciar un el proyecto

TABLE 3-3 Project initiation knowledge areas, processes, and outputs

Knowledge Area	Initiating Process	Outputs
<i>Project Integration Management</i>	Develop project charter	Project charter
<i>Project Communications Management</i>	Identify stakeholders	Stakeholder register Stakeholder management strategy

Carta de Constitución del Proyecto

Project Title: Project Management Intranet Site Project

Project Start Date: May 2, 2005 **Projected Finish Date:** November 4, 2005

Budget Information: The firm has allocated \$140,000 for this project. The majority of costs for this project will be internal labor. An initial estimate provides a total of 80 hours per week.

Project Manager: Erica Bell, (310) 889-5896, erica_bell@jwdconsulting.com

Project Objectives: Develop a new capability accessible on JWD Consulting's intranet site to help internal consultants and external customers manage projects more effectively. The intranet site will include several templates and tools that users can download, examples of completed templates and related project management documents used on real projects, important articles related to recent project management topics, article retrieval service, links to other sites with useful information, and an "Ask the Expert" feature, where users can post questions they have about their projects and receive advice from experts in the field. Some parts of the intranet site will be accessible free to the public, other parts will only be accessible to current customers and/or internal consultants, and other parts of the intranet site will be accessible for a fee.

Approach:

- Develop a survey to determine critical features of the new intranet site and solicit input from consultants and customers.
 - Review internal and external templates and examples of project management documents.
 - Research software to provide features such as security, managing user inputs, and the article retrieval and "Ask the Expert" capability.
 - Develop the intranet using an iterative approach, soliciting a great deal of user feedback.
 - Determine a way to measure the value of the intranet site in terms of reduced costs and new revenues, both during the project and one year after project completion.
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Carta de Constitución del Proyecto (Continuación)

ROLES AND RESPONSIBILITIES:

NAME	ROLE	POSITION	CONTACT INFORMATION
Joe Fleming	Sponsor	JWD Consulting, CEO	joe_fleming@jwdconsulting.com
Erica Bell	Project Manager	JWD Consulting, manager	erica_bell@jwdconsulting.com
Michael Chen	Team Member	JWD Consulting, senior consultant	michael_chen@jwdconsulting.com
Jessie Faue	Team Member	JWD Consulting consultant	jessie_faue@jwdconsulting.com
Kevin Dodge	Team Member	JWD Consulting, IT department	kevin_dodge@jwdconsulting.com
Cindy Dawson	Team Member	JWD Consulting, IT department	cindy_dawson@jwdconsulting.com
Kim Phuong	Advisor	Client representative	kim_phuong@client1.com
Page Miller	Advisor	Client representative	page_miller@client2.com

Comments: (Handwritten or typed comments from above stakeholders, if applicable)

"I will support this project as time allows, but I believe my client projects take priority. I will have one of my assistants support the project as needed." —Michael Chen

"We need to be extremely careful testing this new system, especially the security in giving access to parts of the intranet site to the public and clients." —Kevin Dodge and Cindy Dawson

Table 3-4. Stakeholder Register

Name	Position	Internal/ External	Project Role	Contact Information
Joe Fleming	CEO	Internal	Sponsor	joe_fleming@jwdeconsulting.com
Erica Bell	PMO Director	Internal	Project manager	erica_bell@jwdeconsulting.com
Michael Chen	Team member	Internal	Team member	michael_chen@jwdeconsulting.com
Kim Phuong	Business analyst	External	Advisor	kim_phuong@client1.com
Louise Mills	PR Director	Internal	Advisor	louise_mills@jwdeconsulting.com

Table 3-4. Stakeholder Management Strategy

Name	Level of Interest	Level of Influence	Potential Management Strategies
Joe Fleming	High	High	Joe likes to stay on top of key projects and make money. Have a lot of short, face-to-face meetings and focus on achieving the financial benefits of the project.
Louise Mills	Low	High	Louise has a lot of things on her plate, and she does not seem excited about this project. She may be looking at other job opportunities. Show her how this project will help the company and her resume.

Contents are often sensitive, so do not publish this document.

Kick-off Meetings

- Es una buena práctica realizar una reunión de lanzamiento del proyecto - **kick-off meeting** – con el propósito que todos los interesados se conozcan, revisar los objetivos del proyecto y discutir los planes futuros

Agenda Kick-off Meeting

Kick-Off Meeting

[Date of Meeting]

Project Name: Project Management Intranet Site Project

Meeting Objective: Get the project off to an effective start by introducing key stakeholders, reviewing project goals, and discussing future plans

Agenda:

- Introductions of attendees
- Review of the project background
- Review of project-related documents (i.e., business case, project charter)
- Discussion of project organizational structure
- Discussion of project scope, time, and cost goals
- Discussion of other important topics
- List of action items from meeting

Action Item	Assigned To	Due Date

Date and time of next meeting:

Planeación del Proyecto

- El propósito principal de la planeación del proyecto es guiar la ejecución
- Cada área de conocimiento incluye información de planeación
- Principales salidas:
 - A team contract (Contrato de equipo)
 - Declaración del alcance del proyecto
 - Estructura de descomposición de trabajo (WBS)
 - Cronograma del proyecto, en forma de diagrama de Gantt que incluya todas las dependencias y recursos
 - Lista de riesgos priorizados

Procesos de Planeación y Salidas

KNOWLEDGE AREA	PROCESS	OUTPUTS
Integration	Project Plan Development	<ul style="list-style-type: none"> ■ Project plan ■ Supporting detail
Scope	Scope Planning	<ul style="list-style-type: none"> ■ Scope statement ■ Supporting detail ■ Scope management plan
	Scope Definition	<ul style="list-style-type: none"> ■ WBS ■ Scope statement updates
Time	Activity Definition	<ul style="list-style-type: none"> ■ Activity list ■ Supporting detail ■ WBS updates
	Activity Sequencing	<ul style="list-style-type: none"> ■ Project network diagram ■ Activity list updates
	Activity Duration Estimating	<ul style="list-style-type: none"> ■ Activity duration estimates ■ Basis of estimates ■ Activity list updates
	Schedule Development	<ul style="list-style-type: none"> ■ Project schedule ■ Supporting detail ■ Schedule management plan ■ Resource requirement updates
Cost	Resource Planning	<ul style="list-style-type: none"> ■ Resource requirements
	Cost Estimating	<ul style="list-style-type: none"> ■ Cost estimates ■ Supporting detail ■ Cost management plan
	Cost Budgeting	<ul style="list-style-type: none"> ■ Cost baseline
Quality	Quality Planning	<ul style="list-style-type: none"> ■ Quality management plan ■ Operational definitions ■ Checklists ■ Inputs to other processes

Procesos de Planeación y Salidas (Continuación)

KNOWLEDGE AREA	PROCESS	OUTPUTS
Human Resource	Organizational Planning	<ul style="list-style-type: none">■ Role and responsibility assignments■ Staffing management plan■ Organizational chart■ Supporting detail
	Staff Acquisition	<ul style="list-style-type: none">■ Project staff assigned■ Project team directory
Communications	Communications Planning	<ul style="list-style-type: none">■ Communications management plan
Risk	Risk Management Planning	<ul style="list-style-type: none">■ Risk management plan
	Risk Identification	<ul style="list-style-type: none">■ Risks■ Triggers■ Inputs to other processes
	Qualitative Risk Analysis	<ul style="list-style-type: none">■ Overall risk ranking for the project■ List of prioritized risks■ List of risks for additional analysis and management■ Trends in qualitative risk analysis results
	Quantitative Risk Analysis	<ul style="list-style-type: none">■ Prioritized list of quantified risks■ Probabilistic analysis of the project■ Probability of achieving the cost and time objectives■ Trends in quantitative risk analysis results
	Risk Response Planning	<ul style="list-style-type: none">■ Risk response plan■ Residual risks■ Secondary risks■ Contractual agreements■ Contingency reserve amounts needed■ Inputs to other processes■ Inputs to a revised project plan

Contrato de Equipo

Code of Conduct: As a project team we will:

- Work proactively, anticipating potential problems and working to prevent them
 - Keep other team members informed of information related to the project
 - Focus on what is best for the entire project team
-

Participation: We will:

- Be honest and open during all project activities
 - Encourage diversity in teamwork
 - Provide the opportunity for equal participation
 - Be open to new approaches and consider new ideas
 - Have one discussion at a time
 - Let the project manager know well in advance if a team member has to miss a meeting or may have trouble meeting a deadline for a given task
-

Communication: We will:

- Decide as a team on the best way to communicate. Since a few team members cannot meet often for face-to-face meetings, we will use e-mail, a project Web site, and other technology to assist in communicating
- Have the project manager facilitate all meetings and arrange for phone and videoconferences as needed
- Work together to create the project schedule and enter actuals into our enterprise-wide project management system by 4 PM every Friday
- Present ideas clearly and concisely
- Keep discussions on track and have one discussion at a time

Contrato de Equipo (Continuación)

Problem Solving: We will:

- Encourage everyone to participate in solving problems
 - Only use constructive criticism and focus on solving problems, not blaming people
 - Strive to build on each other's ideas
-

Meeting Guidelines: We will:

- Plan to have a face-to-face meeting the first and third Tuesday morning of every month
 - Meet more frequently the first month
 - Arrange for telephone or videoconferencing for participants as needed
 - Hold other meetings as needed
 - Record meeting minutes and send them out via e-mail within 24 hours of all project meetings, focusing on decisions made and action items from each meeting
 - Develop an agenda before all meetings with our project sponsor and client advisors
 - Document major issues and decisions related to the project and send them out via e-mail to all team members and the project sponsor
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Declaración del Alcance del Proyecto

Project Title: Project Management Intranet Site Project

Date: May 18, 2005

Prepared by: Erica Bell, Project Manager, (310)889-5896,
erica_bell@jwdconsulting.com

Project Justification: Joe Fleming, CEO of JWD Consulting, requested this project to assist the company in meeting its strategic goals. The new intranet will increase visibility of the company's expertise to current and potential clients through the sections of the intranet to which they will have access. It will also help reduce internal costs and improve profitability by providing standard tools, techniques, templates, and project management knowledge to all internal consultants. The budget for the project is \$140,000. An additional \$40,000 will be required for operational expenses after the project is completed. Estimated benefits are \$200,000 each year. It is important to focus on the system paying for itself within one year.

Product Characteristics and Requirements:

1. Templates and tools: The intranet site will allow authorized users to download files they can use to create project management documents and to help them use project management tools. These files will be in Microsoft Word, Excel, Access, PowerPoint, Project, or in HTML or PDF format, as appropriate.

Declaración del Alcance (Continuación)

- 2 User submissions: Users will be encouraged to e-mail files with sample templates and tools to the Webmaster. The Webmaster will forward the files to the appropriate person for review and then post the files to the intranet site, if desired
- 3 Articles: Articles posted on the intranet site will have appropriate copyright permission. The preferred format for articles will be PDF. The project manager may approve other formats
- 4 Requests for articles: The intranet site will include a section for users to request someone from the Project Management Office (PMO) at JWD Consulting to research appropriate articles for them. The PMO manager must first approve the request and negotiate payments if appropriate
- 5 Links: All links to external sites will be tested on a weekly basis. Broken links will be fixed or removed within five working days of discovery.
6. The "Ask the Expert" feature must be user-friendly and capable of soliciting questions and immediately acknowledging that the question has been received in the proper format. The feature must also be capable of forwarding the question to the appropriate expert (as maintained in the system's expert database) and capable of providing the status of questions that are answered. The system must also allow for payment for advice, if appropriate

Declaración del Alcance (Continuación)

7. Security: The intranet site must provide several levels of security All internal employees will have access to the entire intranet site when they enter their security information to access the main corporate intranet. Part of the intranet will be available to the public from the corporate Web site Other portions of the intranet will be available to current clients based on verification with the current client database. Other portions of the intranet will be available after negotiating a fee or entering a fixed payment using preauthorized payment methods
8. Search feature: The intranet site must include a search feature for users to search by topic keywords, etc.
9. The intranet site must be accessible using a standard Internet browser Users must have appropriate application software to open several of the templates and tools.
10. The intranet site must be available 24 hours a day 7 days a week, with one hour per week for system maintenance and other periodic maintenance, as appropriate.

Declaración del Alcance (Continuación)

Summary of Project Deliverables

Project management-related deliverables: Business case, charter, team contract, scope statement WBS, schedule, cost baseline, status reports, final project presentation, final project report, lessons-learned report and any other documents required to manage the project

Product-related deliverables:

- 1 Survey: Survey current consultants and clients to help determine desired content and features for the intranet site.
- 2 Files for templates: The intranet site will include templates for at least twenty documents when the system is first implemented, and it will have the capacity to store up to one hundred documents. The project team will decide on the initial twenty templates based on survey results
- 3 Examples of completed templates: The intranet site will include examples of projects that have used the templates available on the intranet site. For example, if there is a template for a business case, there will also be an example of a real business case that uses the template

Declaración del Alcance (Continuación)

- 4 Files for tools: The intranet site will include information on how to use several project management tools, including the following as a minimum: work breakdown structures, Gantt charts, network diagrams, cost estimates, and earned value management. Where appropriate, sample files will be provided in the application software appropriate for the tool. For example, Microsoft Project files will be available to show sample work breakdown structures, Gantt charts, network diagrams, cost estimates, and applications of earned value management. Excel files will be available for sample cost estimates and earned value management charts.
- 5 Example applications of tools: The intranet site will include examples of real projects that have applied the tools listed in number 4 above.
- 6 Articles: The intranet site will include at least ten useful articles about relevant topics in project management. The intranet site will have the capacity to store at least one thousand articles in PDF format with an average length of ten pages each.
- 7 Links: The intranet site will include links with brief descriptions for at least twenty useful sites. The links will be categorized into meaningful groups.
- 8 Expert database: In order to deliver an “Ask the Expert” feature, the system must include and access a database of approved experts and their contact information. Users will be able to search for experts by predefined topics.

Declaración del Alcance (Continuación)

9. User request: The intranet site will include an application to solicit and process requests from users
10. Intranet site design: An initial design of the new intranet site will include a site map, suggested formats, appropriate graphics, etc. The final design will incorporate comments from users on the initial design
11. Intranet site content: The intranet site will include content for the templates and tools section, articles section, article retrieval section, links section, "Ask the Expert" section, User Requests feature, security, and payment features
12. Test plan: The test plan will document how the intranet site will be tested, who will do the testing, and how bugs will be reported.
13. Promotion: A plan for promoting the intranet site will describe various approaches for soliciting inputs during design. The promotion plan will also announce the availability of the new intranet site
14. Project benefit measurement plan: A project benefit plan will measure the financial value of the intranet site.

Declaración del Alcance (Continuación)

Project Success Criteria: Our goal is to complete this project within six months for no more than \$140,000. The project sponsor, Joe Fleming, has emphasized the importance of the project paying for itself within one year after the intranet site is complete. To meet this financial goal, the intranet site must have strong user inputs. We must also develop a method for capturing the benefits while the intranet site is being developed, tested, and after it is rolled out. If the project takes a little longer to complete or costs a little more than planned, the firm will still view it as a success if it has a good payback and helps promote the firm's image as an excellent consulting organization.

Estructura de Descomposición de Trabajo (WBS)

1.0 Initiating

- 1.1 Determine/assign project manager
- 1.2 Identify key stakeholders
- 1.3 Prepare business case
- 1.4 Prepare project charter

2.0 Planning

- 2.1 Hold project kickoff meeting
- 2.2 Prepare team contract
- 2.3 Prepare scope statement
- 2.4 Prepare WBS
- 2.5 Prepare schedule and cost baseline
 - 2.5.1 Determine task resources
 - 2.5.2 Determine task durations
 - 2.5.3 Determine task dependencies
 - 2.5.4 Create draft Gantt chart
 - 2.5.5 Review and finalize Gantt chart
- 2.6 Identify, discuss, and prioritize risks

Estructura de Descomposición de Trabajo (WBS)

3.0 Executing

- 3.1 Survey
- 3.2 User inputs
- 3.3 Intranet site content
 - 3.3.1 Templates and tools
 - 3.3.2 Articles
 - 3.3.3 Links
 - 3.3.4 Ask the Expert
 - 3.3.5 User requests feature
- 3.4 Intranet site design
- 3.5 Intranet site construction
- 3.6 Intranet site testing
- 3.7 Intranet site promotion
- 3.8 Intranet site roll-out
- 3.9 Project benefits measurement

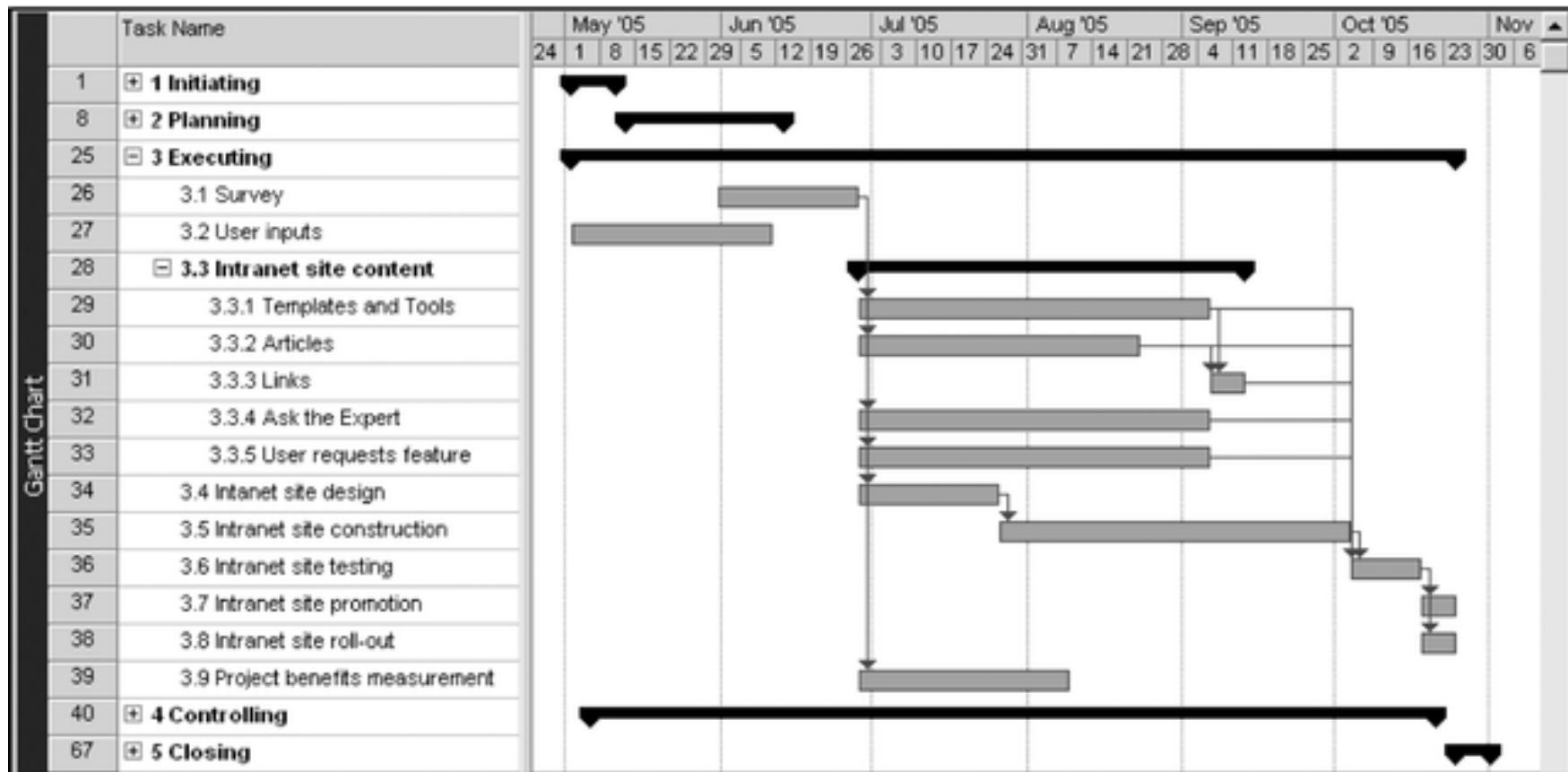
4.0 Controlling

- 4.1 Status reports

5.0 Closing

- 5.1 Prepare final project report
- 5.2 Prepare final project presentation
- 5.3 Lessons learned

Diagrama de Gantt Proyecto de Intranet de JWD



Lista de Riesgos Priorizados

RANKING	POTENTIAL RISK
1	Lack of inputs from internal consultants
2	Lack of inputs from client representatives
3	Security of new system
4	Outsourcing for the article retrieval and “Ask the Expert” features
5	Outsourcing for processing online payment transactions
6	Organizing the templates and examples in a useful fashion
7	Providing an efficient search feature
8	Getting good feedback from Michael Chen and other senior consultants
9	Effectively promoting the new system
10	Realizing the benefits of the new system within one year

Ejecución del Proyecto

- Dado que los productos del proyecto son producidos en esta etapa; normalmente, la ejecución toma la mayor parte del tiempo y de los recursos
- Las salidas mas importantes de la etapa de ejecución son “resultados”
- Los gerentes de proyectos deben usar sus habilidades de liderazgo para afrontar los retos que surgen durante la ejecución del proyecto

Procesos de Ejecución y Salidas

KNOWLEDGE AREA	PROCESS	OUTPUTS
Integration	Project Plan Execution	Work results Change requests
Quality	Quality Assurance	Quality improvement
Human Resources	Team Development	Performance improvements Inputs to performance Appraisals
Communications	Information Distribution	Project records Project reports Project presentations
Procurement	Solicitation Source Selection Contract Administration	Proposals Contracts Correspondence Contract changes Payment requests

Reporte de Hitos a 17/06/05

MILESTONE	DATE	STATUS	RESPONSIBLE	ISSUES/COMMENTS
Initiating				
Determine/assign project manager	5/2/05	Completed	Joe	
Business case completed	5/6/05	Completed	Erica	
Project charter signed	5/10/05	Completed	Erica	
Planning		Completed		
Hold project kickoff meeting	5/13/05	Completed	Erica	
Team contract signed	5/13/05	Completed	Erica	
Scope statement completed	5/27/05	Completed	Erica	
WBS completed	5/31/05	Completed	Erica	
List of prioritized risks completed	6/3/05	Completed	Erica	Review with sponsor
Schedule and cost baseline completed	6/13/05	Completed	Erica	

Reporte de Hitos a 17/06/05 (Continuación)

Executing				
Survey completed	6/28/05		Erica	Poor response so far!
Intranet site design completed	7/26/05		Kevin	
Project benefits measurement completed	8/9/05		Erica	
User inputs collected	8/9/05		Jessie	User inputs collected
Articles completed	8/23/05		Jessie	
Templates and tools completed	9/6/05		Erica	Templates and tools completed
Ask the Expert completed	9/6/05		Michael	
User Requests feature completed	9/6/05		Cindy	
Links completed	9/13/05		Kevin	
Intranet site construction completed	10/4/05		Kevin	
Intranet site testing completed	10/18/05		Cindy	

Reporte de Hitos a 17/06/05 (Continuación)

MILESTONE	DATE	STATUS	RESPONSIBLE	ISSUES/COMMENTS
Intranet site promotion completed	10/25/05		Erica	
Intranet site roll-out completed	10/25/05		Kevin	
Controlling				
Status reports	Every Friday	All		
Closing	10/25/05			
Final project presentation completed	10/27/05		Erica	
Sponsor sign-off on project completion	10/27/05		Joe	
Final project report completed	10/28/05		Erica	
Lessons-learned reports submitted	11/1/05		All	

Control del Proyecto

- Control significa la medición del progreso hacia los objetivos del proyecto, monitoreo de las desviaciones del plan y la toma de acciones correctivas.
- El control afecta todos los demás grupos de procesos y ocurre durante todas las fases del ciclo de vida del proyecto
- Salidas importantes: estado del proyecto y reportes de progreso

Procesos de Control y Salidas

Integration	Integrated Change Control	Project plan corrective actions Lessons learned
Scope	Scope Verification Scope Change Control	Formal acceptance Scope changes Corrective actions Lessons learned Adjusted baseline
Time	Schedule Control	Schedule updates Corrective actions Lessons learned
Cost	Cost Control	Revised cost estimates Budget updates Corrective actions Estimate at completion Project closeout lessons learned
Quality	Quality Control	Quality improvement Acceptance decisions Rework Completed checklists Process adjustments
Communication	Performance Reporting	Performance reports Change requests
Risk	Risk Monitoring and Control	Workaround plans Corrective actions Project change requests Updates to the risk response plan Risk database Updates to risk Identification checklists

Ejemplo de un Reporte de Estado Semanal

Project Name: Project Management Intranet Project

Team Member Name: Cindy Dawson, cindydawson@jwdconsulting.com

Date: August 5, 2005

Work completed this week:

- Worked with Kevin to start the intranet site construction
 - Organized all the content files
 - Starting developing a file naming scheme for content files
 - Continued work on ‘Ask the Expert’ and User Requests features
 - Met with preferred supplier
 - Verified that their software would meet our needs
 - Discovered the need for some customization
-

Work to complete next week:

- Continue work on intranet site construction
 - Prepare draft contract for preferred supplier
 - Develop new cost estimate for outsourced work
-

What's going well and why:

The intranet site construction started well. The design was very clear and easy to follow. Kevin really knows what he's doing.

What's not going well and why:

It is difficult to decide how to organize the templates and examples. Need more input from senior consultants and clients.

Suggestions/Issues:

- Hold a special meeting to decide how to organize the templates and examples on the intranet site
 - Get some sample contracts and help in negotiating with the preferred supplier.
-

Cierre del Proyecto

- Durante los procesos de cierre se debe obtener la aceptación del producto final por parte de clientes e interesados y se debe llevar el proyecto a un fin de manera ordenada.
- Aún si los proyectos no son completados, deben ser cerrados
- Archivos del proyecto y lecciones aprendidas son salidas importantes. En la mayoría de casos se incluyen reportes y presentaciones finales

Procesos de Cierre y Salidas

KNOWLEDGE AREA	PROCESS	OUTPUTS
Communications	Administration Closure	Project archives Project closure Lessons learned
Procurement	Contract Close-out	Contract file Formal acceptance and closure

Ejemplo del Reporte de Resumen y Lecciones Aprendidas del Proyecto

Project Name: JWD Consulting Project Management Intranet Site Project

Project Sponsor: Joe Fleming

Project Manager: Erica Bell

Project Dates: May 2, 2005 – November 4, 2005

Tabla de Contenido del Reporte Final del Proyecto

- 1 Project Objectives
- 2 Summary of Project Results
3. Original and Actual Start and End Dates
4. Original and Actual Budget
5. Project Assessment: (Why did you do this project? What did you produce? Was the project a success? What went right and wrong on the project?)
- 6 Transition Plan
- 7 Annual Project Benefits Measurement Approach

Attachments:

A. Project Management Documentation

- Business case
- Project charter
- Team contract
- Scope statement
- WBS
- Baseline and actual Gantt chart
- List of prioritized risks
- Milestone reports
- Status reports
- Contract files
- Lessons-learned reports
- Final presentation
- Client acceptance form

Seguimiento Posterior a la Finalización del Proyecto

- Muchas organizaciones se han dado cuenta que es importante revisar los resultados de los proyectos cerca de un año después de haber sido finalizados
- Muchos proyectos prometen ahorros potenciales, así que es importante revisar las estimaciones financieras y aprender de ellas para preparar nuevas estimaciones