

## Appendix B. Project Management Tools and Techniques

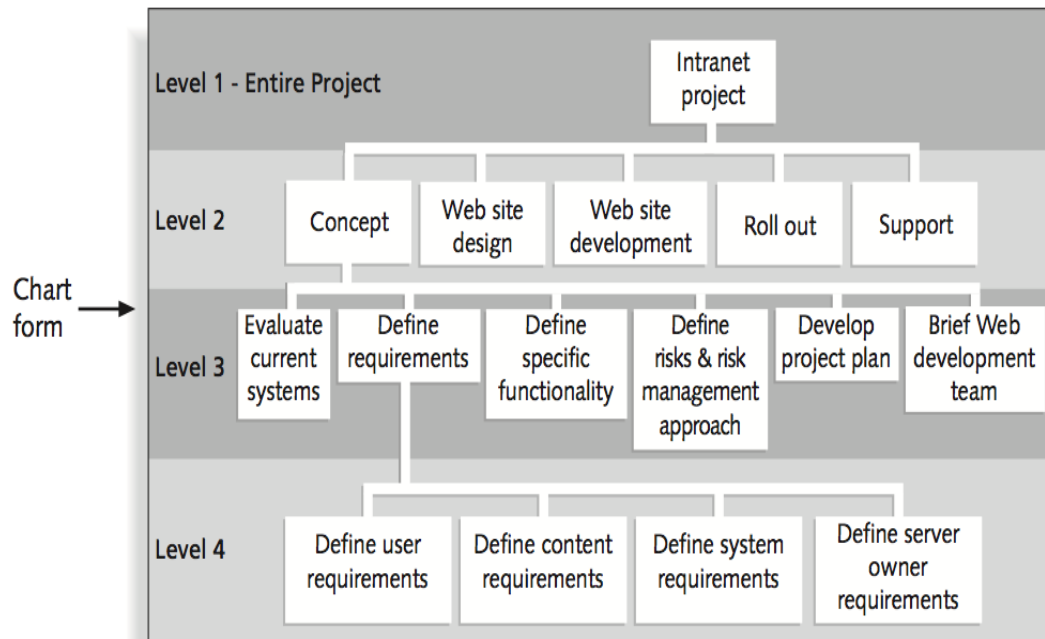


Figure 2-1 Sample Work Breakdown Structure in Chart Form

### Tabular form with Microsoft Project numbering

- 1.0 Concept
  - 1.1 Evaluate current systems
  - 1.2 Define requirements
    - 1.2.1 Define user requirements
    - 1.2.2 Define content requirements
    - 1.2.3 Define system requirements
    - 1.2.4 Define server owner requirements
  - 1.3 Define specific functionality
  - 1.4 Define risks and risk management approach
  - 1.5 Develop project plan
  - 1.6 Brief Web development team
- 2.0 Web site design
- 3.0 Web site development
- 4.0 Roll out
- 5.0 Support

### Tabular form with PMI numbering

- 1.1 Concept
  - 1.1.1 Evaluate current systems
  - 1.1.2 Define requirements
    - 1.1.2.1 Define user requirements
    - 1.1.2.2 Define content requirements
    - 1.1.2.3 Define system requirements
    - 1.1.2.4 Define server owner requirements
  - 1.1.3 Define specific functionality
  - 1.1.4 Define risks and risk management approach
  - 1.1.5 Develop project plan
  - 1.1.6 Brief Web development team
- 1.2 Web site design
- 1.3 Web site development
- 1.4 Roll out
- 1.5 Support

Figure 2-2 Sample Work Breakdown Structure in Tabular Form

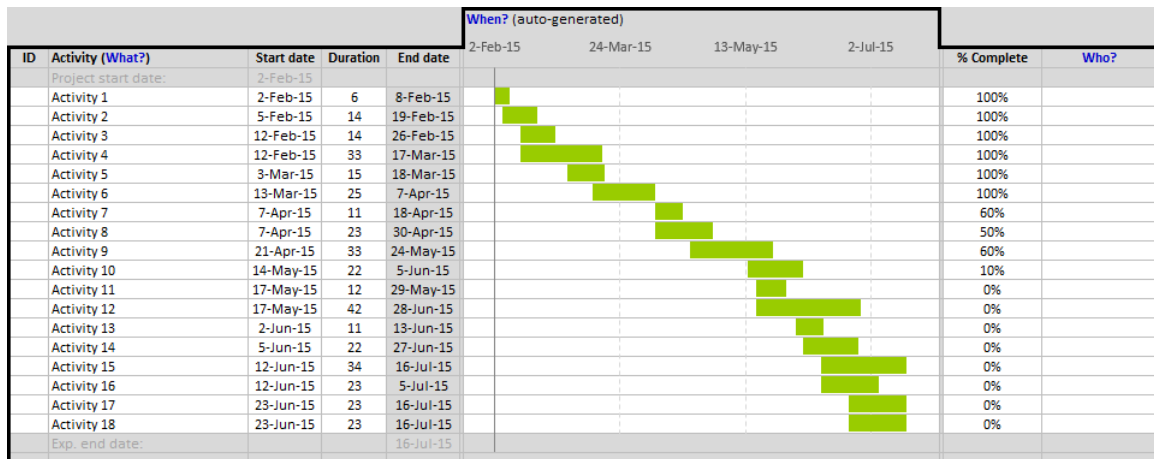


Figure 2-3 Sample Gantt Chart

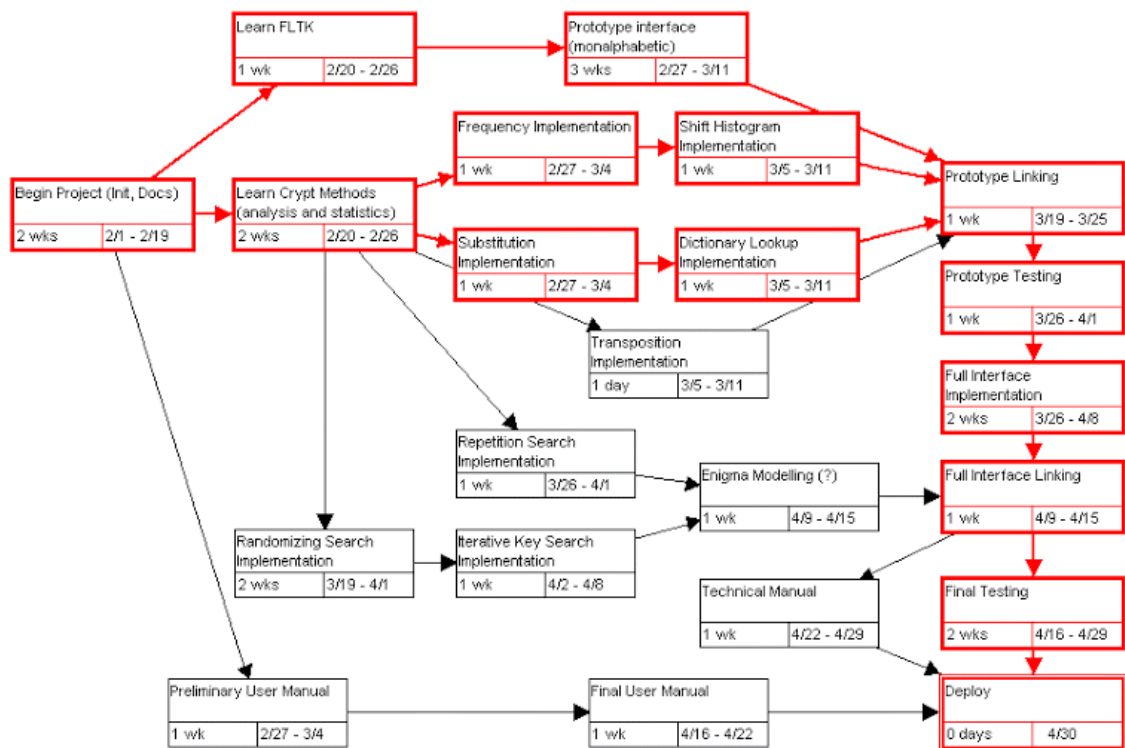


Figure 2-4 Sample PERT Chart

RACI Matrix Template																
ROLE	Project Leadership				Project Team Members				Project Sub-Teams				External Resources			
Project Deliverable (or Activity)	Executive Sponsor	Project Sponsor	Steering Committee	Advisory Committee	Role #5	Project Manager	Tech Lead	Functional Lead	SME	Project Team Member	Developer	Administrative Support	Business Analyst	Role #4	Role #5	Consultant
Initiate Phase Activities																
Request Review by PMO	A/C	R/A				R/A	A/C		C							A
Submit Project Request						R										
Research Solution	I					R/A	A/C	A/C	C			C		C		
Develop Business Case	I	A/C	I	I		R/A	C	C	C			C		C	C	
Plan Phase Activities																
Create Project Charter	C	C				R/A	C	C	C			C		C		
Create Schedule	I	I	I	I		R/A	C	C	C	C	C	C	C	C	I	
Create Additional Plans as Required	I	I	I			R/A				I	I	I	I	C	I	
Execute Phase Activities																
Build Deliverables	C/I	C/I	C/I	C/I		R/A	R/A	R/A	R/A	R/A				A/C		
Create Status Report	I	I	I	I		R/A	R/A	R/A	R/A					C	I	
Control Phase Activities																
Perform Change Management		C	C	C		R	A	A	A					C	I	
Close Phase Activities																
Create Lessons Learned	C	C	C	C		R/A	C	C	C	C	C	C		C	C	
Create Project Closure Report	I	I	I	I		R/A	I	I	I	I	I	I		I		

Figure 2-5 Sample RACI Accountability Matrix

WEEKLY STATUS REPORT		
To:		
From:		
Subject:	Status	
Period Ending:		
Self Assessment:	Green, Yellow, Red	
<div>ACTIVITIES COMPLETED THIS WEEK</div> <div>Completed Deliverables:</div> <div>&gt;</div>		
<div>ACTIVITIES IN PROCESS</div> <div>&gt;</div>	<div>NEXT ACTION</div> <div>&gt;</div>	<div>DUE DATE</div> <div>&gt;</div>
<div>ACTIVITIES TO BE STARTED NEXT WEEK</div> <div>&gt;</div>		

Figure 2-6 Sample Current Period Report

**Project Status Report**

**Project Name** **Project Phase**

<b>For period:</b>	<i>Include a date range (i.e. September 1, 2004 – September 30, 2004)</i>
<b>Submitted by:</b>	
<b>Green</b>	Strong probability the project will be delivered on time, within budget, and with acceptable quality.
<b>Yellow</b>	Good probability the project will be delivered on time, within budget, and with acceptable quality. Schedule, budget, resource, or scope changes may be needed.
<b>Red</b>	Probable that the project will NOT be delivered with acceptable quality without changes to schedule, budget, resources, and/or scope.

**EXECUTIVE SUMMARY**

Status Item	Current Status	Prior Status	Summary
<b>Overall Project Status</b>	Green	Yellow	<i>Include a brief overall summary of the project for the reporting period.</i>
<b>Scope</b>	Yellow	Red	<i>Include an overall statement regarding any change in scope.</i>
<b>Schedule</b>	Red	Yellow	<i>Include a description of any variance in schedule.</i>
<b>Cost</b>	Yellow	Green	<i>Include a description of any variance in cost.</i>
<b>Project Risk</b>	Green	Yellow	<i>Include a description of any changes to the risk management log.</i>
<b>Accomplishments:</b> <i>Enter project accomplishments for the reporting period, identifying activities, meetings, and any deliverables produced.</i>			
<b>Expected Accomplishments:</b> <i>List project activities planned for the next reporting period.</i>			

Figure 2-7 Sample Stoplight Report

<b>&lt;Company Name&gt;</b> <b>Plan versus Actual Variance Report—Financial Services</b> <b>&lt;Date&gt;</b>							
<b>Data cell key</b> <b>Data input cells</b> <i>Formula cells: Totals are calculated and filled in automatically.</i>							
	January	February	March	Q1	April	May	June
<b>INCOME STATEMENT</b>							
<b>Interest income</b>							
Plan	\$65,000	\$75,000	\$85,000	\$225,000	\$75,000	\$80,000	\$90,000
Actual	\$60,000	\$70,000	\$88,000	\$218,000	\$95,000	\$65,000	\$88,000
Variance \$ (Actual - Plan)	(\$5,000)	(\$5,000)	\$3,000	(\$7,000)	\$20,000	(\$15,000)	(\$2,000)
Variance %	-7.69%	-6.67%	3.53%	-3.11%	26.67%	-18.75%	-2.22%
<b>Interest expense</b>							
Plan	\$50,000	\$55,000	\$65,000	\$170,000	\$55,000	\$60,000	\$70,000
Actual	\$45,000	\$55,000	\$63,000	\$163,000	\$45,000	\$55,000	\$63,000
Variance \$ (Plan - Actual)	\$5,000	\$0	\$2,000	\$7,000	\$10,000	\$5,000	\$7,000
Variance %	10.00%	0.00%	3.08%	4.12%	18.18%	8.33%	10.00%
<b>Bad debt/credit losses</b>							
Plan	\$8,000	\$3,000	\$4,000	\$15,000	\$6,000	\$7,000	\$8,000
Actual	\$10,000	\$4,000	\$3,000	\$17,000	\$5,000	\$6,500	\$7,500
Variance \$ (Plan - Actual)	(\$2,000)	(\$1,000)	\$1,000	(\$2,000)	\$1,000	\$500	\$500
Variance %	-25.00%	-33.33%	25.00%	-13.33%	16.67%	7.14%	6.25%
<b>Noninterest income</b>							
Plan	\$35,000	\$40,000	\$40,000	\$115,000	\$40,000	\$40,000	\$45,000
Actual	\$40,000	\$41,000	\$42,000	\$123,000	\$42,000	\$43,000	\$45,000

Figure 2-8 Sample Variance Report