**PROJECT MANAGEMENT METHODOLOGY FOR MINOR PROJECT**

**BACKGROUND:**

Cloud Counselage delivers many projects for its clients and internally as well. To bring about consistency in the way we deliver our projects, we have developed a project management methodology, which helps our client and our team understand the approach that needs to be taken to deliver these projects. Since these projects vary in duration depending upon its scope, it is practical to take a different approach to deliver projects which are of shorter duration than that taken for the projects of longer duration to bring about efficiencies. In Cloud Counselage, the projects of more than 3 months duration are referred to as a major project and that up to 3 months duration is referred to as a minor project.

**OBJECTIVE**:

The objective of this document is

* to act as guide for delivering projects successfully by adopting standard project management procedures for initiation, planning, execution, monitoring and control, and closure
* the guidance of the project team’s operations towards achieving all the agreed-upon goals within the set scope, time, quality, and budget standards.

**WHAT IS A PROJECT?**

A project is a unique endeavour to produce a set of deliverables within a clearly specified time, cost, and quality constraints. Projects are different from standard business operational activities as they;

* Are unique in nature. They do not involve repetitive processes. Every project undertaken is different from the last, whereas the operational activities often involve undertaking repetitive(identical) processes.
* Have a defined time scale. Projects have a clearly specified start and end date within which the deliverables must be produced to meet specified customer requirements.
* Have an approved budget. Projects are allocated a level of financial expenditure within which the deliverables are produced, to meet a specified customer requirement.
* Have limited resources. At the start of a project, an agreed amount of labour, equipment, and materials is allocated to the project.
* Involve an element of risk. Projects entail a level of uncertainty and therefore carry business risk.
* Achieve beneficial change. The purpose of a project is typically to improve an organization through the implementation of business change.

**WHAT IS PROJECT MANAGEMENT?**

Project management is the skills, tools, and management processes required to undertake a project successfully. It incorporates.

* A set of skills. Specialist knowledge, skills, and experience are required to reduce the level of risk within a project and thereby enhances its likelihood of success.
* A suite of tools. Various types of tools are used by project managers to improve their chances of success. Examples include document templates, registers, planning software, modelling software, audit checklist, and review forms.
* A series of processes. Various processes and techniques are required to monitor and control time, cost quality, and scope on projects. Examples include time management, cost management, quality management, change management, risk management, and issue management.

**THE PROJECT LIFE CYCLE**

A project life cycle is the sequence of phases that a project goes through from its initiation to its closure. The number and sequence of the cycle are determined by the management and various other factors like the needs of the organization involved in the project, the nature of the project, and its area of application. The phases have a definite start, end, and control point and are constrained by time. The project lifecycle can be defined and modified as per the needs and aspects of the organization. Even though every project has a definite start and end, the objectives, deliverables, and activities vary widely. The life cycle provides the foundation of the actions that have to be performed in the project, irrespective of the specific work involved.

The project life cycle generally consists of five phases. They are.

* **PROJECT INITIATION**
* **PROJECT PLANNING**
* **PROJECT EXECUTION**
* **PROJECT CONTROL AND MONITORING**
* **PROJECT CLOSURE**



**GENERAL INSTRUCTIONS FOR USING THE PROJECT MANAGEMENT TEMPLATES:**

* PLEASE FIND THE ATTACHED PROJECT MANAGEMENT TEMPLATES WORKBOOK BELOW.
* THESE PROJECT TEMPLATES WILL HELP TO STANDARDIZE THE VAROIUS TASKS THAT WILL BE USED FOR THE PROJECT IN DIFFRENT PHASES.
* THE TEMPLATES WHICH NEEDS TO BE COMPLETED IN EACH PHASE IS MENTIONED IN THE “PHASES AND TEMPLATES” SHEET OF THE WORKBOOK.
* ON FILLING THE TEMPLATES, PLEASE GET IT VERIFIED FROM YOUR PROJECT MANAGER/SUPERVISOR.
* CIRCULATING THESE TEMPLATES BEYOND THE ORGANIZATION WILL LEAD TO LEGAL CONSEQUENCES.



**PROJECT INITIATION**

Project initiation is the first phase of a [project’s life cycle.](https://www.projectmanager.com/blog/4-keys-understanding-the-project-management-life-cycle) It is at this point where the opportunity or reason for the project is identified and a project is developed to take advantage of that opportunity.

**WHAT TO BE COMPLETED:**

* **PROJECT CHARTER:**

Project Charter is one of the major outputs of the project initiation phase. The project charter describes high-level information about the project. It includes sponsor information, high-level scope, high-level risks, business needs, project manager information, etc.

**INSTRUCTION TO USE THE PROJECT CHARTER TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.

**PROJECT PLANNING**

The planning phase is critical to creating a project roadmap the entire team can follow. This is where all the details are outlined, and goals are defined to meet the requirements laid out by the organization.

**WHAT TO BE COMPLETED:**

* **PROJECT PLAN:**

In IT, the term project plan refers to a Gantt chart or any other document that displays project activities along a timeline. However, considering these documents alone as a project plan is inaccurate. These documents can be more precisely termed as project schedules and may be considered only a part of the actual project plan.

**INSTRUCTION TO USE THE PROJECT PLAN TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* CLEAR ALL THE SAMPLE DATA PROVIDED IN THE TEMPLATE. THE DATA PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* MENTION THE FEATURES YOU ARE WORKING ON THE” TASK NAME” FIELD.
* MENTION THE RESOURCE NAME WHO IS RESPONSIBLE FOR COMPLETING A PARTICULAR FEATURE IN THE “ASSIGNED TO” FIELD.
* MENTION THE START DATE AND END DATE OF A PARTICULAR FEATURE IN THE “START DATE” AND “END DATE” FIELD, RESPECTIVELY.
* MENTION THE TIME DURATION FOR COMPLETING A SPECIFIC TASK IN THE “DURATION IN DAYS” FIELD.
* SELECT THE CURRENT STATUS OF THE FEATURE YOU ARE WORKING ON FROM THE DROP-DOWN LIST PROVIDED IN THE “STATUS” FIELD.

**PROJECT EXECUTION**

The execution phase consists of those processes performed to complete the work defined in the project management plan to satisfy the project specifications. The primary objective of Execution and Control is to construct deliverables as per the master project plan and consistently evaluate the processes and plans involved to deliver the output as per the agreed specifications. The execution phase can be further divided into 3 subclasses. They are.

* **DESIGN PHASE:**

In the design phase, one or more designs are developed, with which the project result can apparently be achieved. Depending on the subject of the project, the products of the design phase can include dioramas, sketches, flow charts, site trees, HTML screen designs, prototypes, photo impressions, and UML schemas. The project supervisors use these designs to choose the definitive design that will be produced in the project. This is followed by the development phase. As in the definition phase, once the design has been chosen, it cannot be changed in a later stage of the project.

**WHAT TO BE COMPLETED:**

* **SRS DOCUMENT**

Software Requirements Specifications, also known as SRS, is the term used to describe an in-depth description of a software product to be developed. It’s considered one of the initial stages of development. Think of it as the map that points you to your finished product.

**INSTRUCTION TO USE THE SRS DOCUMENT TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* **BUILD PHASE:**

The Build Phase features a key step in the project system construction. The previous phases lay the foundation for system development; the following phases ensure that the product functions as required. To complete the Build Phase successfully, two elements are required:

1) a complete set of design specifications and

2) proper processes, standards, and tools.

Multiple-release projects require multiple iterations of the Build Phase – one for each release. The purpose of the Build Phase is to convert the system design prototyped in the Design Phase into a working information system that addresses all documented system requirements. At the end of this phase, the working system will enter the Test Phase.

**WHAT TO BE COMPLETED:**

* **DEVELOPMENT LOG**

The development log is used to make a note of all the development changes that are made during the building phase. This log will help you easily handle the different versions of code used for the development.

**INSTRUCTION TO USE THE DEVELOPMENT LOG TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* SELECT THE CURRENT VERSION OF THE FEATURE YOU ARE WORKING ON FROM THE DROP-DOWN LIST IN THE “VERSIONS” FIELD.
* THE STATUS OF DEVELOPMENT CAN BE MENTIONED IN THE “DEVELOPMENT STATUS” FIELD. THREE OPTIONS ARE AVAILABLE FOR SELECTION. IF THE DEVELOPMENT PROCESS IS COMPLETED, PLEASE SELECT “COMPLETED” FROM THE DROP-DOWN MENU. IF THE DEVELOPMENT IS IN PROGRESS, PLEASE SELECT “IN PROGRESS” FROM THE DROP-DOWN MENU. IF THE DEVELOPMENT IS STOPPED FOR SOME REASON, SELECT “PAUSED’ FROM THE DROP-DOWN MENU.
* ON COMPLETION OF THE DEVELOPMENT, USE THE “REVIEW STATUS” FIELD TO MENTION WHETHER THE VERSION HAS BEEN REVIEWED OR NOT.
* **TEST PHASE:**

The primary purpose of the Test Phase is to determine whether the automated system/application software or other IT solution developed or acquired and preliminarily tested during the Development Phase is ready for implementation. During the Test Phase, formally controlled and focused testing is performed to uncover errors and bugs in the IT solution that need to be resolved. There are a number of specific validation tests that are performed during the Test Phase. Additional tests may be conducted to validate documentation, training, contingency plans, disaster recovery, and installation depending upon the specific circumstances of the project.

**WHAT TO BE COMPLETED:**

* **TEST PLAN**

A test plan in software testing is the document that outlines the *what*, *when*, *how*, *who*, and more of a testing project. In general, it includes the objective and scope of the tests to be run. A test plan does not include the tests themselves – those are called test cases

**INSTRUCTION TO USE THE TEST PLAN TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* **TRACEABILITY MATRIX**

Traceability Matrix is a really helpful tool to capture the test case execution progress in one place. It gives management a way to get important Data about Testing.

**INSTRUCTION TO USE THE TRACEABILITY MATRIX TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* **PRODUCTION:**

The goal of the Production phase is to keep systems useful and productive after they have been deployed.

**PROJECT MONITOR AND CONTROL**

The performance and control step of project management occurs over time from the project’s launch to its completion and serves as a method to measure and compare the status of the project compared to the original plan. If adjustments to the project plan need to be made due to unforeseen circumstances or a change in direction, they may happen here.

**WHAT TO BE COMPLETED:**

* **RAID LOG:**

RAID is an acronym that stands for Risks, Assumptions, Issues, and Dependencies.

* **Risks** are the potential problems lurking in your project. Risks tend to be thought of as having an adverse impact on the project, but there are also positive risks.
* **Assumptions** are things you assume are in place which contributes to the success of the project.
* **Issues** are when something goes wrong in the project. If an issue is not managed and resolved it can derail the project or cause the project to fail.
* **Dependencies** are any events or works that are either dependent on the result of your project, or on which your project will be dependent.

A RAID log, therefore, is a project management tool that tracks risks, actions, issues, and decisions. It is a simple way to organize this information and comes in handy during meetings and project audits.

**INSTRUCTION TO USE THE LOG TEMPLATE TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
* THE DESCRIPTIONS FOR WHAT TO BE FILLED IN EACH OF THE FIELDS IS PROVIDED IN THE TEMPLATE.
* CLEAR ALL THE SAMPLE DATA/INSTRUCTIONS PROVIDED IN THE TEMPLATE. THE DATA/INSTRUCTION PROVIDED IS ONLY FOR REFERENCE PURPOSES.
* UNDERSTAND WHAT RISKS, ASSUMPTIONS, ISSUES AND DEPENDENCIES ARE FROM THE DESCRIPTION PROVIDED ABOVE.
* SELECT THE CATEGORY OF RAID FROM THE DROP-DOWN MENU PROVIDED IN THE “RAID CATEGORY” FIELD IN THE TEMPLATE.
* PROVIDE A VALID DESCRIPTION OF THE RAID CATEGORY THAT YOU HAVE SELECTED IN THE “DESCRIPTION” FIELD PROVIDED.
* DESCRIBE THE IMPACT THE RAID CATEGORY YOU HAVE SELECTED WILL HAVE ON THE PROJECT IN THE “IMPACT FIELD”.
* DESCRIBE HOW THE IMPACT OF THE SELECTED RAID CATEGORY CAN BE REDUCED ON THE PROJECT IN THE “MITIGATION FIELD” IN THE TEMPLATE.
* MENTION THE RESPONSIBLE PERSON FOR WORKING ON THE SELECTED RAID CATEGORY IN THE “OWNER” FIELD IN THE TEMPLATE.
* SELECT THE PRIORITY WITH WHICH THE SELECTED RAID CATEGORY NEED TO BE MITIGATED. THE FOLLOWING LEVELS OF PRIORITY IS GIVEN IN THE DROP DOWN MENU. SELECT;
* NEGLIGIBLE: IF THE RAID CATEGORY IS NOT GOING TO MAKE ANY IMPACT ON THE PROJECT
* LOW: IF THE RAID CATEGORY IS GOING TO MAKE VERY SMALL IMPACTS ON THE PROJECT
* MODERATE: IF THE RAID CATEGORY IS GOING TO MAKE FEW IMPACTS WHICH CAN AFFECT THE PROJECT ADVERSELY.
* HIGH: IF THE RAID CATEGORY IS GOING TO MAKE MAJOR IMPACTS ON THE PROJECT ADVERSELY.
* CRITICAL: IF THE RAID CATEGORY IS GOING TO AFFECT THE PROJECT AT ANY STAGE.
* PROVIDE RISK PRIORITY NUMBER BASED ON THE PRIORITY SELECTED FOR THE RAID CATEGORY SELECTED.
* SELECT THE STATUS OF THE RAID CATEGORY SELECTED. TWO OPTIONS ARE PROVIDED IN THE DROP DOWN MENU. SELECT;
* OPEN: IF THE RESPONSIBLE PERSON IS STILL WORKING ON THE RAID CATEGORY SELECTED.
* CLOSED: IF THE RESPONSIBLE PERSON HAS WORKED ON THE RAID CATEGORY AND IS SOLVED.

**PROJECT CLOSURE**

Project Closure involves handing over the deliverables to your customer, passing the documentation to the business, canceling supplier contracts, releasing staff and equipment, and informing stakeholders of the closure of the project.

After the project has been closed, a Post Implementation Review is completed to determine the project’s success and identify the lessons learned.

**WHAT TO BE COMPLETED:**

* **LESSONS LEARNED:**

Lessons learned are collected and gathered from all stakeholders. Lesson learned documentation is stored in the organizational process assets of the company.

**INSTRUCTION TO USE THE LESSONS LEARNED DOCUMENT TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
* ON COMPLETION OF THE DOCUMENT, PLEASE GET IT REVIEWED FROM YOUR PROJECT MANAGER/SUPERVISOR
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* **SYSTEM GUIDE:**

The system guides give an overall overview of the project on completion. The system guide will describe the entire system and its part. This will include requirement documents, design decisions, system infrastructure, project source code and help guides.

**INSTRUCTION TO USE THE SYSTEM GUIDE TEMPLATE:**

* ALL FIELDS MUST BE DULY FILLED
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