



## Project Management Workbook

This material will introduce you to general terms and concepts associated with project management (PM). When you begin working for a specific organization, you will likely find that these terms and the way they are used may be different at your organization.

### Defining Project Management

Defining what constitutes a project	<p>Is specific</p> <p>Requires one-off performance.</p> <p>Is large enough to need control mechanisms in place</p> <p>Is not a business as usual activity</p>
Greenfield	<p>New implementation</p> <p>Adding new feature to application</p>
Brownfield	<p>System conversion. Legacy system replacing with a new one</p>
Project Management	<p>Manages activities that are required to successfully complete a project.</p> <p>The activities enhance productivity and control the progress of the project.</p>

### Project Management Result Keywords

Project Manager	Is responsible for planning, organizing, and overseeing the execution of a project to achieve its goals and deliverables.	
Project Charter	A project charter is a formal document that outlines the project's objectives, scope, stakeholders, deliverables, and key constraints, serving as a foundation for project planning and execution.	
Project Schedule	Used for documenting and detailing key milestones and shows the progress of a project. Can take the form of a list or Gantt Chart.	

Gantt Chart	a project management tool that illustrates work completed over a period of time in relation to the time planned for the work.
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## Planning

1. Determine the viability of the proposal. Will the final product create enough value to pay for the project costs and give the organization enough benefit (return on investment) to make the effort worthwhile?
2. Get Project Charter signed off to have organizational commitment to support and pay for the project.
3. Plan out project activities. Ensure that the project is going to be controllable.

## Execution

1. Collect and plan specific requirements to understand the deliverable.
2. Determine and acquire resources (skill sets) needed to accomplish delivery.
3. Create a schematic or blueprint to detail the build.
4. Perform the work necessary to create a product or prototype.
5. Perform all testing to validate that the deliverable meets the quality and functionality requirements of the customer.
6. Perform testing to validate that introduction of this new product into the environment will not cause harm to the environment or other existing products.
7. Ensure that customers/users are prepared to receive this product (training, user manuals, documentation).
8. Provide a knowledge transfer plan for implementation to execute.
9. Turn over all implementable components to the release process.

## Implementation

1. Perform all activities necessary to place the product into the live environment.
2. Execute a Knowledge transfer plan to ensure support personnel are ready to support the end customer.
3. Notify the customer/user community as to the availability of the new product or service.
4. Provide support to operations staff and user community as the service is hooked up for actual usage.





## Closure

1. Finalize documentation for future needs.
2. Pay all outstanding invoices.
3. Validate customer acceptance and satisfaction.
4. Perform any additional activities required to close-out the project.

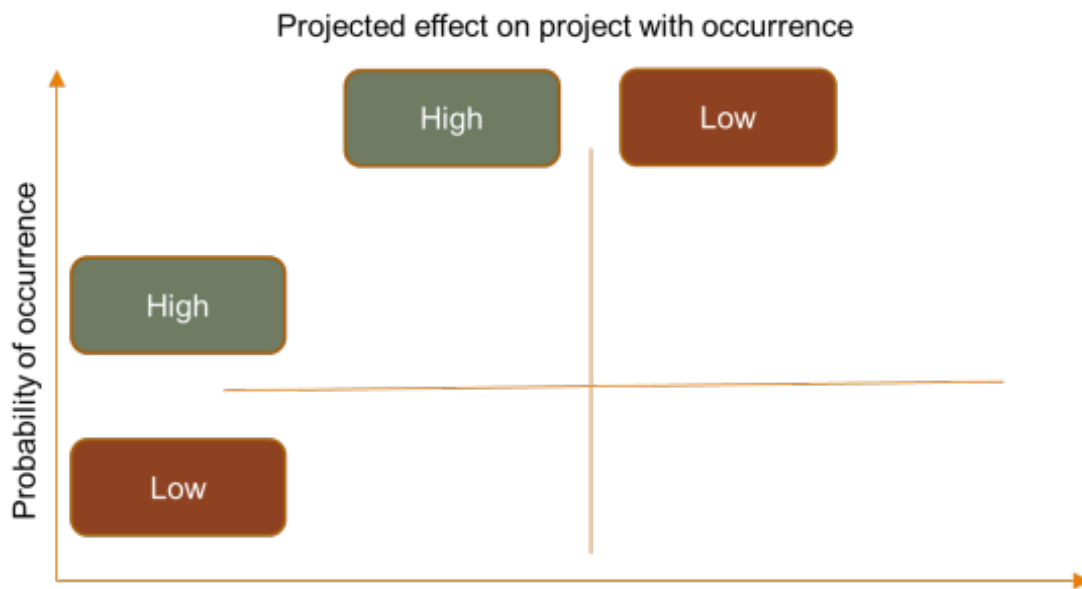
## Nine Areas of Attention

Scope	Defines the work to be done, how much work and expectations (quality, cost, delivery)
Schedule	Control documentation defining timing for all activities, including delivery.
Cost	Expected and actual cost.
Quality	Evaluate the quality of the deliverables as they are being designed, built, and delivered.
Risks	Something that might happen (positive or negative).

Issues	Something that is happening or has happened (always current problem and negative).
Stakeholders	Everyone involved in the project
Administration	Reports, paperwork, meetings, communication, and purchases
Approvals	Initial, milestone, completion, acceptance, etc.

 <p><u>Risk</u></p> <p>An uncertain event or circumstance that can affect the outcome of the objectives and are measured by the probability and magnitude of impact.</p>	 <p><u>Issue</u></p> <p>A risk that has happened or is happening.</p>
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## Assessing the Importance of a Risk



Mitigation  
Strategy

Mitigation strategies are developed for probable and significant risks to decrease their likelihood of occurrence.

## Risk Register

Database or document that contains details of project risks

Control #	Date Raised	Description	Impact on occurrence	Likelihood of occurrence	Mitigation Strategy	Owner	Status Open/On Hold/Closed
001	10/12/22	Town council may require some changes to bridge design	High - Delays	Low - no issue in past bridge projects	<ul style="list-style-type: none"><li>Engage with council early.</li><li>Request same design standards.</li><li>If occurs, require a contract extension.</li></ul>	Joe Smith	Open

Required

determine a mitigation strategy as soon as possible):

1. Purchase and Need not well-defined.
2. Incomplete project design and deliverable definition.
3. Difficulty in defining and understanding project schedules.
4. Risk related to budget.
5. Resistance to change.
6. Risks related to resources.
7. Lack of control over staff priorities.
8. Risk factors related to disputes.
9. Unplanned work risk.
10. Communication issues.
11. Risk related to errors.
12. Escalating project conflicts not reported in a timely manner.
13. Delay in projects.
14. Increased workload due to policy changes, direction or statutes.
15. Health and safety.
16. Change in exchange rates.
17. Quality-related risk.
18. Resource supplier's risk.
19. Risk related to partners.
20. Market-based risk.

## Issue Register

Database or document that contains details of issues.

No.	Issue Title	Issue Description	Reported On	Reported By	Owner	Severity	Priority	Status	Comments
1	Code Module Issue	An issue with code module was recently identified. The user is not able to make changes to the rates.	25-02-2015	Neel	Julie	Low	High	New	SRW 07-Feb : New Issue logged today.
2	User Access Issue	Some of the users are not able to login.	23-03-2015	Swapnil	Kamel	High	Urgent	WIP	SRW 25-Mar : Issue is affecting service levels.
3	Server Memory Issue	One of the server mms0013 has memory issues and needs to be looked at. This memory issue is causing a performance issue with the application.	26-03-2015	Jack	Cathy	Medium	High	Closed	
4	User Interface Issue	Users are not able to make changes to certain fields when updating.	01-04-2015	Sam	Julie	Low	Medium	OnHold	SRW 05-Apr : On Hold due to business confirmation.
5	Spelling Error	One of the fields has a spelling error.	02-04-2015	Neel	Jim	Critical	Low	New	SRW 04-Apr : New Issue.

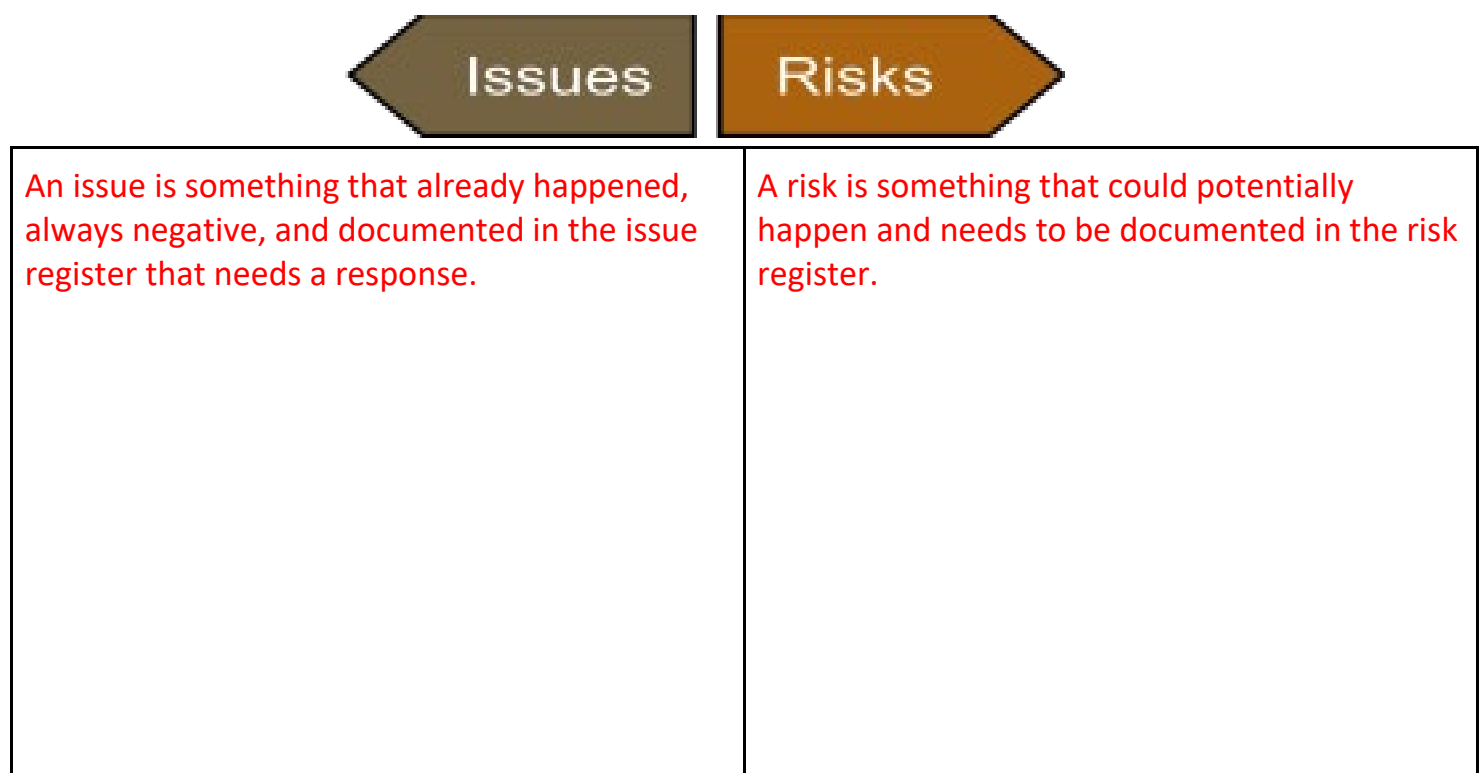
Can a risk also be an issue at the same time? **No**, a risk is something that might happen (usually negative), and an issue is something that has already happened or is happening.

Can this be listed in both the risk register and issue register at the same time? **No**

Why or why not?

Because a risk register can be used to determine preventative actions. While an issue register is for issues that already happen and can have a plan of action to fix the issue.

## Relationship of Risk to Issue

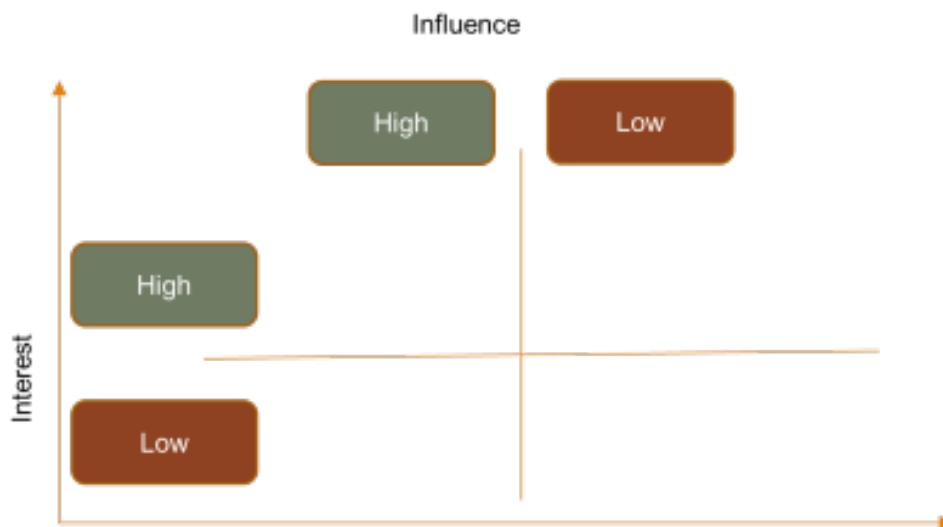


Stakeholder	Stakeholders are individuals or entities with a vested interest in a project and can influence or be impacted by its outcomes.
Customer	An entity that pays for service or product (may or may not be the one who actually uses the service or product directly) (The Go-Kart rider)

User	An end-user or user is the entity that consumes/utilizes a service or product. (The Go-Kart company)
Supplier	The supplier is an entity that provides products and services used in the creation or delivery of products or services to the end customer. (Microsoft)
Service Provider	Can be IT companies that provides services to customers to enhance the business productivity. It can be owned by the customer or an external entity. (The IT Company implementing the integration to Microsoft)

## Factors in determining the level of stakeholder involvement:

### Determining Stakeholder Level of Involvement



RACI Usage	An assessment used to gauge stakeholder involvement and their role in a project.
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R—	Responsible for correct execution.
A—	Accountable for the final result.
C—	Consulted to provide additional knowledge and information.
I—	Informed or kept up to date regarding progress

## RACI Example

	Director Service Management	Service Level Manager	Problem Manager	Security Manager	Procurement Manager
Activity 1	A/R	C	I	I	C
Activity 2	A	R	C	C	C
Activity 3	A/I	R		C	C
Activity 4	I	A	R	I	
Activity 5	I	R	A	R	I

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What is the #1 rule for using a RACI matrix?

You can only have 1 person in each accountable to ensure clarity and agreement on each stakeholder's role and level of responsibility for project tasks and decisions.

## Every business looks to attain three things

1. Achieve objectives
2. Manage Risks
3. Have fully utilized resources

The concept of value is determined by three items:

Circumstances	Needs or wants	Perception
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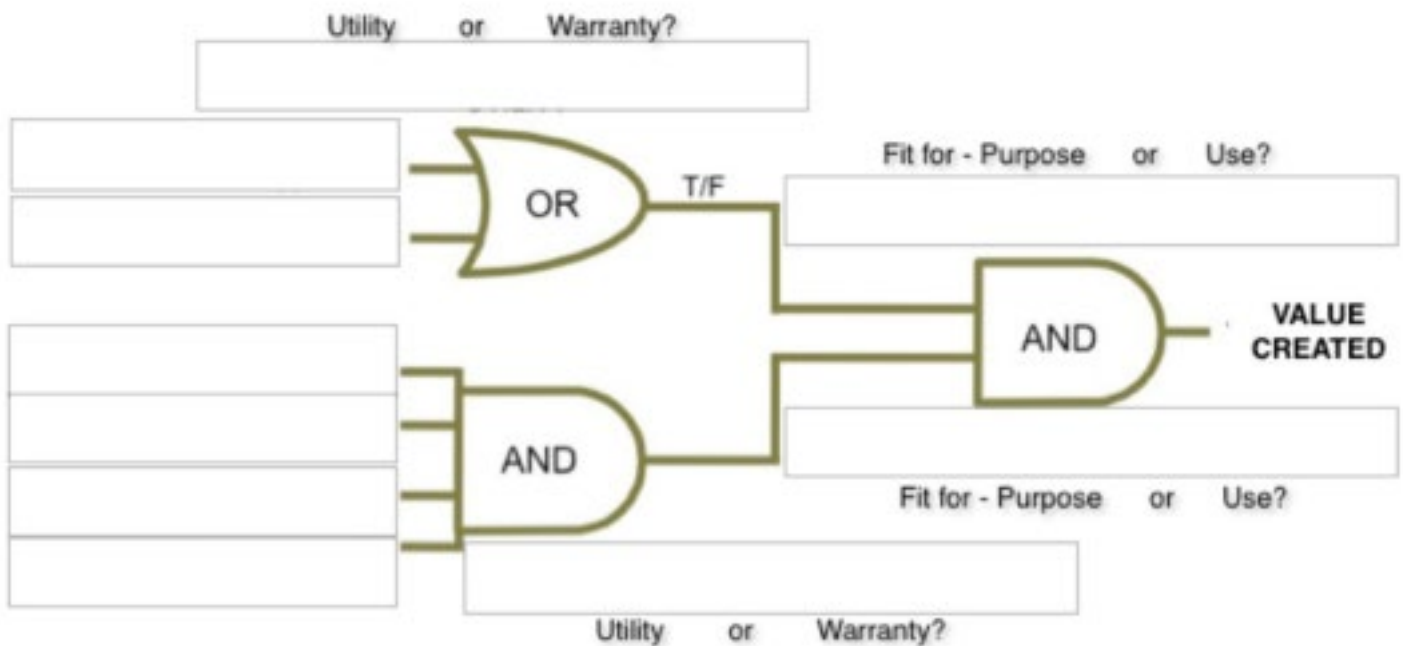
Why do we want to control the customer's perception of the value of our deliverables?

Because the value is defined by the customer's perspective, and they can determine if a product is profitable or not.

Utility		& Warranty	
Use	Purpose	Use	Purpose
Fit for purpose (works as designed). Improves probability of achieving outcomes. Improves customer performance capability. Reduces customer constraints.  What the project is trying to achieve- Does it solve the problem?		Fit for use (Guaranteed consistency of delivery) Availability – When needed. Capacity – Adequate for business needs. IT Service Continuity – Major disruption recovery. Security – Are Customer assets secure?  Is it available, streamlined, easy to use?	

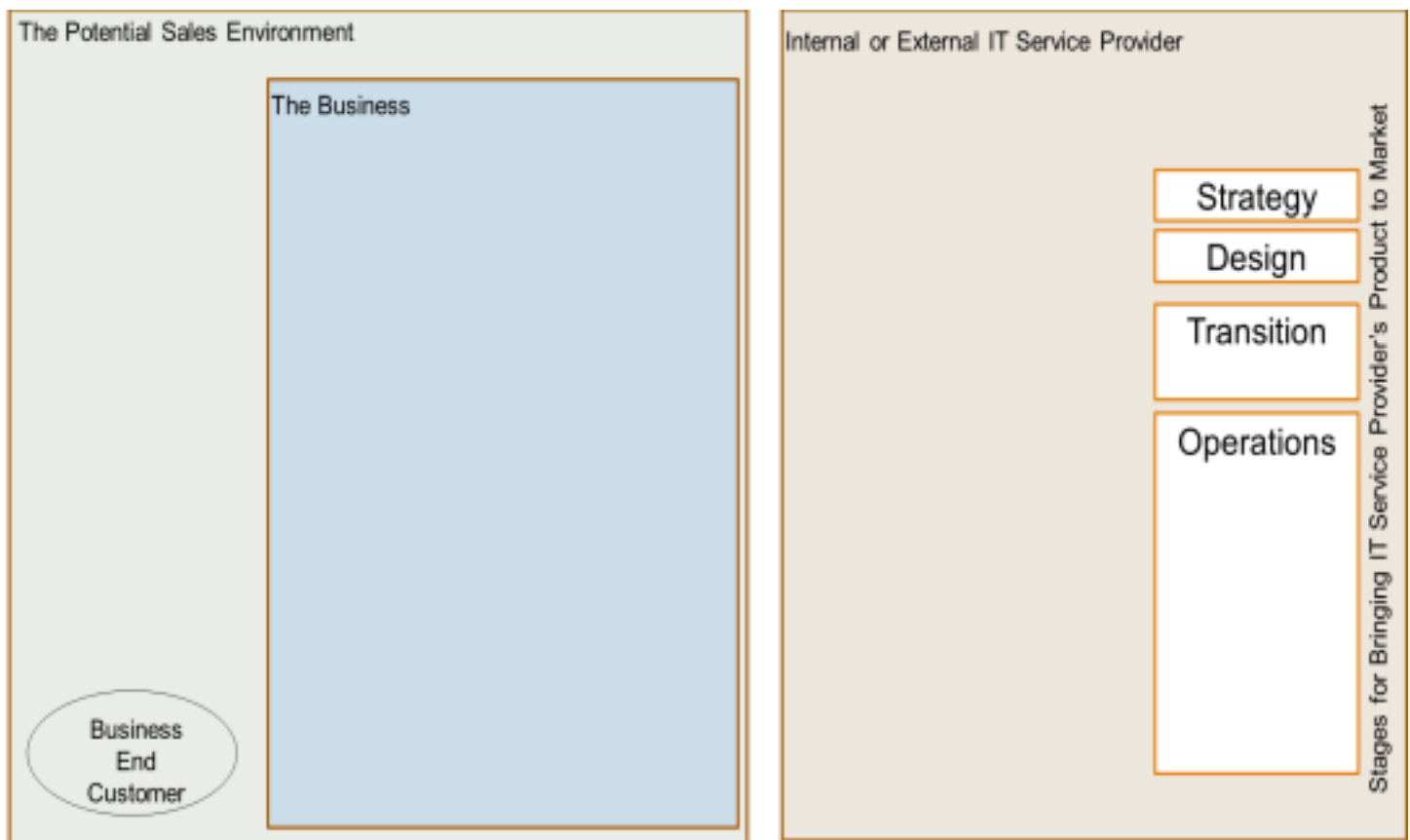
Who's opinion of value is the only opinion that matters?

The Customers



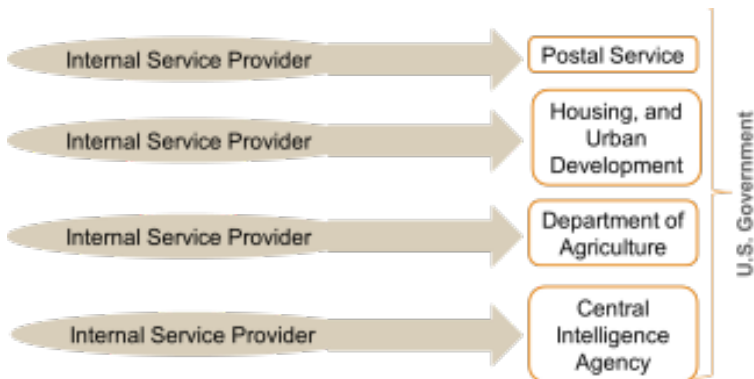
What happens when an organization fails to deliver value?

The project fails or they lose money, lose credibility and reliability



## Service Provider Types

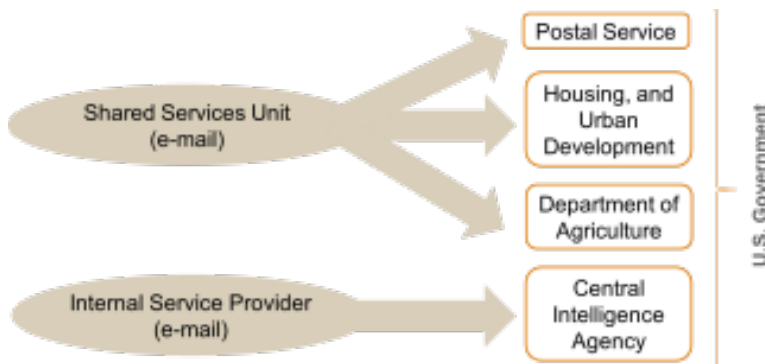
### Internal Service Provider



Different business units within an organization may have their own internal IT departments. (This is an example of multiple internal service providers; each providing services to a single customer.)

### Shared Services Unit

Provides services to multiple internal customers. (Each individual customer may have different levels of service delivery to meet individual needs.)



## External Service Provider

Provides services to multiple customers.

