PER SCHOLAS

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	A project is an individual or collab endeavor that is planned to achieve an outcome
Greenfield	New implementation
Brownfield	System conversion
Project Management	Effective management of all activities to succeed and complete a project.

Project Management Result Keywords

Project Manager	Responsible for managing the process and activities of project management	
Project Charter	Document that provides formal approval to proceed as a project.	
Project Schedule	Project schedule is used for documenting and detailing key milestones.	

Gantt Chart	Shows what must be done and when it should be done. Visual tool used to identify relat4ed timing and predecessor and successor activities.

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

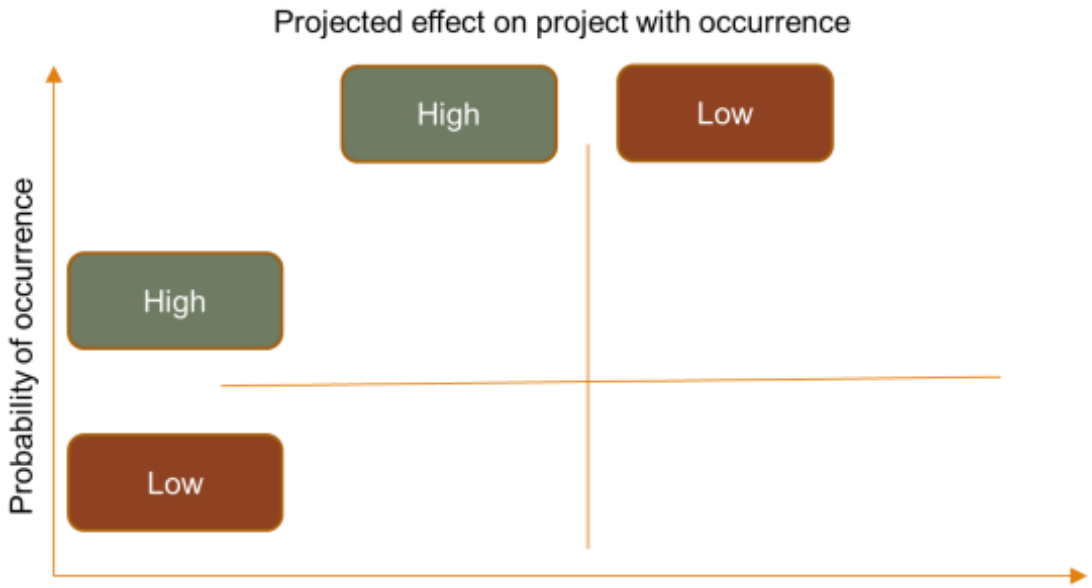
1. Finalize documentation for future needs.
2. Pay all outstanding invoices.
3. Validate customer acceptance and satisfaction.
4. Perform any additional activities required to close-out the project.

Nine Areas of Attention

Scope	Define area that needs to be done. How much work and expectations. Quality, Cost, Delivery.
Schedule	Control document defining timing for all project activities, including delivery.
Cost	Expected and actual Cost
Quality	Evaluating the quality of deliverables as they are being designed , and delivered.

Risks	Something that might happen , negative or positive but usually mostly negative.
Issues	Something that has happened or is happening that is negative
Stakeholders	Group impacted by project
Administration	Paperwork , meetings, reports.
Approvals	Initial , milestone, completion

Assessing the Importance of a Risk



Mitigation Strategy	Created for any risk deemed probable. Implementing and determining strategy to risk the occurrence should it happen, document both the risk and register.

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	• Engage with council early. • Request same design standards. • If occurs, require a contract extension.	Joe Smith	Open

Required

20 most common risk categories of which to be aware of (When one of these categories is identified as being active, you should

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 mms001) 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? _____

Can this be listed in both the risk register and issue register at the same time? _____

Why or why not?

Yes you can continue to manage risk register and manage issue register because they can boith occur at the same time.

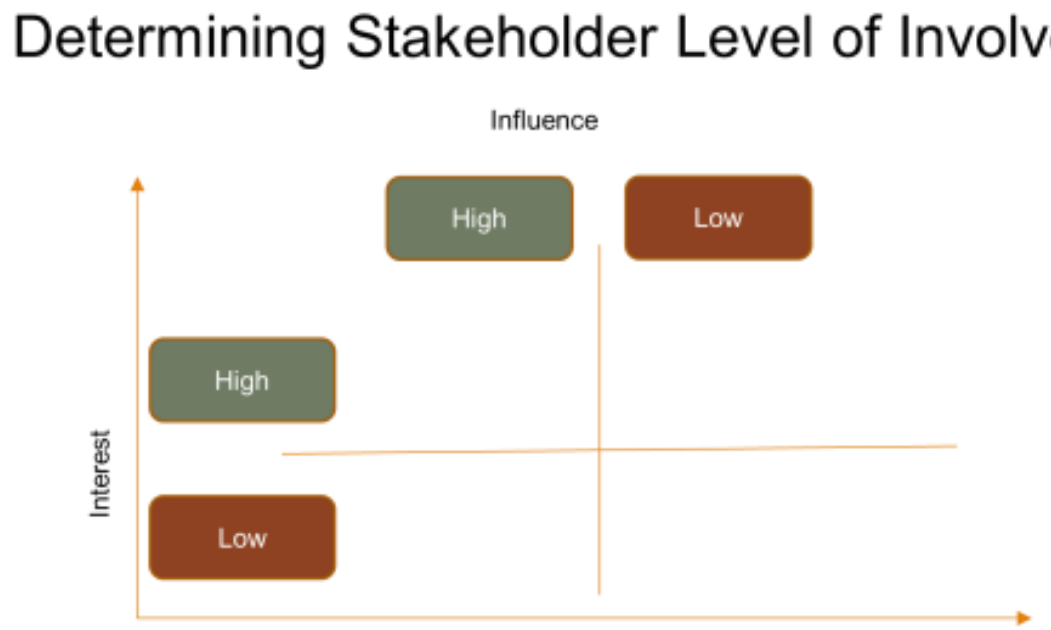
Relationship of Risk to Issue

Focus on present	Evaluated for future
Always negative	Positive or negative
Document in issue register	Documented in risk register
Response will be issue work around	Response performed based on risk response planning

Stakeholder	Stakeholder is entity with interest in outcome of project
Customer	Entity who pays for service or product
User	Entity that consumes service or product

Supplier	Entity that provides products and services used in creation or delivery of products or services.
Service Provider	Entity provides to customers and users to enhance business productivity.

Factors in determining the level of stakeholder involvement:



RACI Usage	Tool used to identify stakeholders and involvement in a project or activity.
R—	Responsible for correct execution

A—	Accountable for 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

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

At least one person responsible and another accountable for each task

Every business looks to attain three things

1. _____Achieve objective _____
2. _____Manage risks_____

3. _____Have fully utilized resources _____

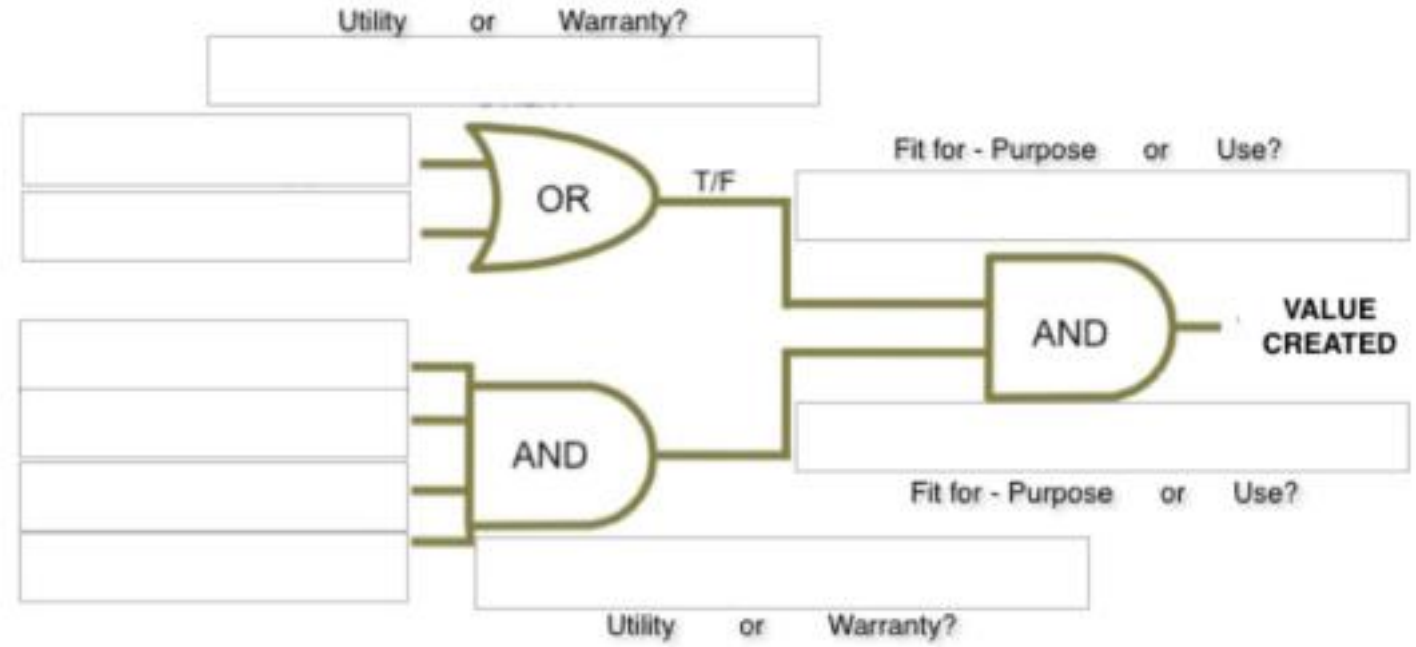
The concept of value is determined by three items:

Time to Market	Fierce Competition.	Not responding to Changing Technologies/Conditions.

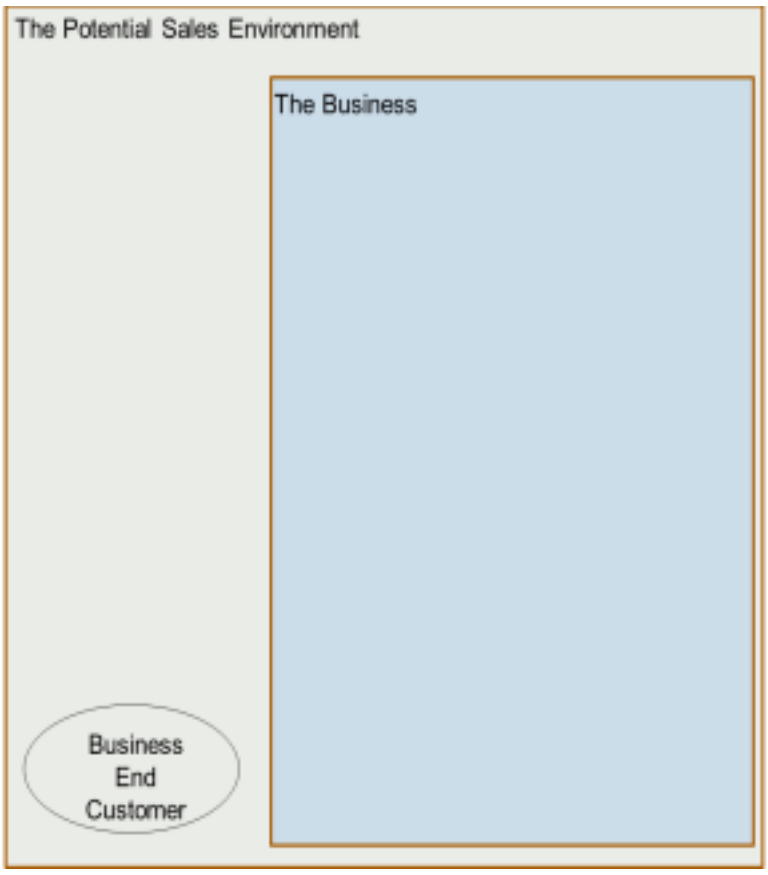
Why do we want to control the customer's perception of the value of our deliverables?
Control pricing. Affordable mix of features. Value changes over time and circumstances.

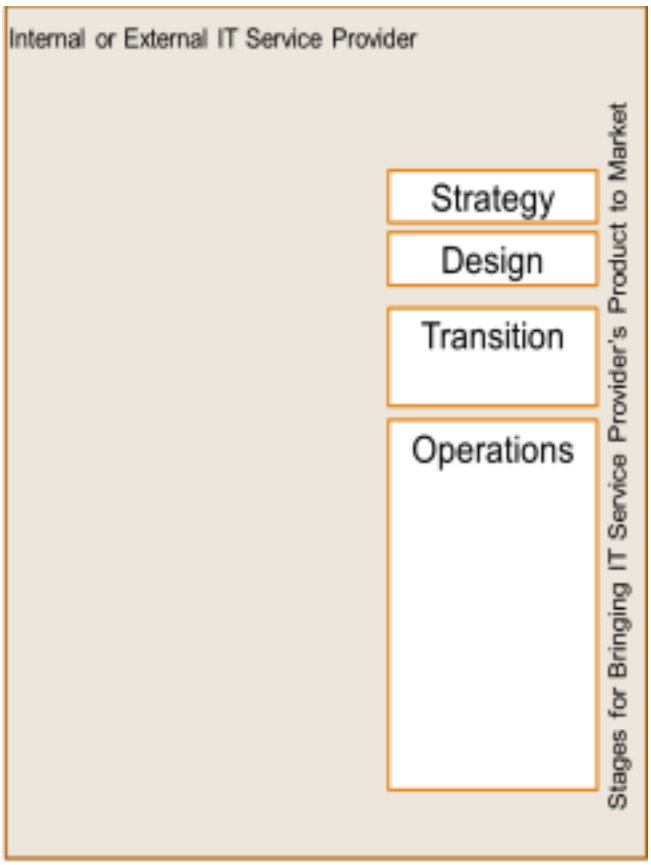
Utility		&	Warranty	
Use	Purpose		Use	Purpose
Improve Customer performance Minimize or remove a constraint Fit for purpose			Correct Availability Correct Capacity Correct Continuity Correct Security Warranty Fit For use	

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



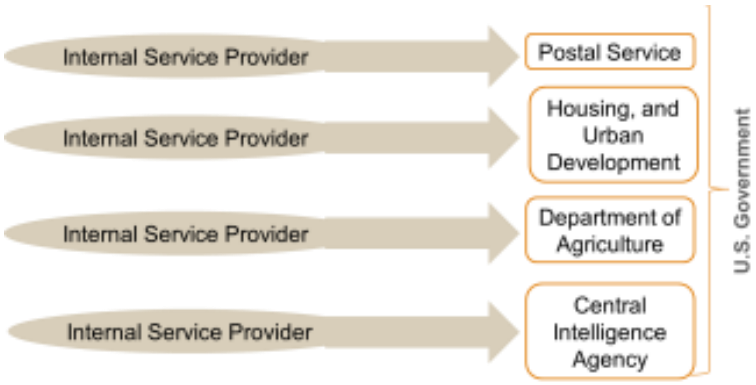
What happens when an organization fails to deliver value?
Profitability goes down.



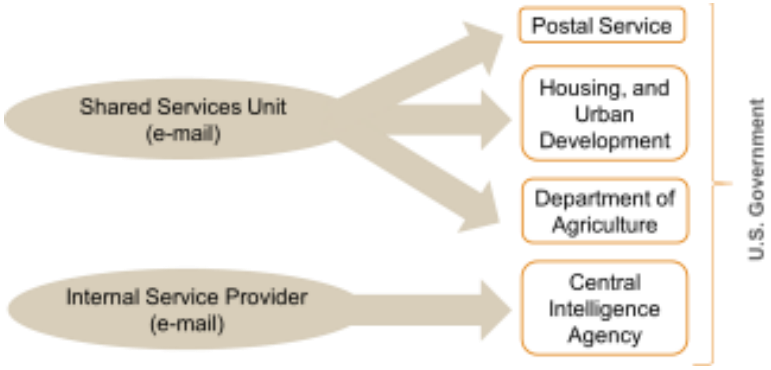
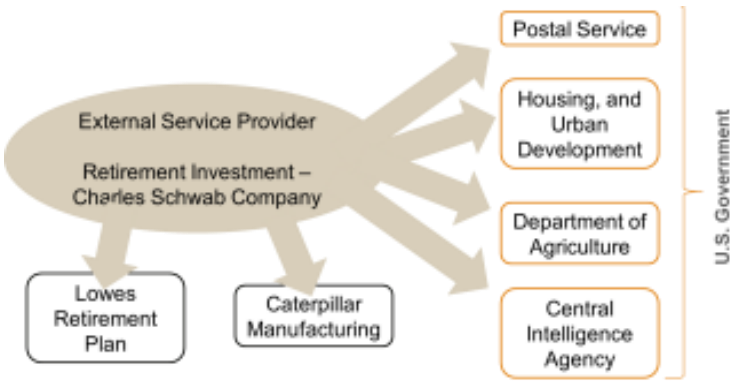


Service Provider Types

Internal Service Provider



Shared Services Unit



External Service Provider