

The “I’m going to manage this project so that it doesn’t manage me!” Workbook

Project Name: _____ Project Manager: _____ Project Sponsor: _____
As of _____

<p>1. Initiating Process</p> <p>Project Charter</p> <ul style="list-style-type: none">• What is the business need?• What or who is originating this project?• What problem does this solve?• Who does this project benefit?• Describe the impact to our customer.• What does a “success” look like?• Who is the project sponsor? <p>Preliminary Project Scope (high level definition of project)</p> <ul style="list-style-type: none">• What are the anticipated deliverables?• Start date?• End date?• Resource considerations:<ul style="list-style-type: none">• People• Money• Time		
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Tom Horvath

Tom@tomhorvath.com

www.TomHorvath.com

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<p>2. Planning Process (once the planning process is completed, all plans roll together to form the Project Management Plan)</p> <p>Scope Planning</p> <ul style="list-style-type: none">• How will the scope be defined?• Who verifies and controls the scope?• Who can change the scope and what is the process?• Who approves the deliverables?• Who has the authority to assign work? <p>Scope Definition</p> <ul style="list-style-type: none">• Describe the measurable success criteria (cost, schedule, quality)• What is excluded from this project?• Are there any pre-defined project milestones with dates?• What constraints do we have to work within?		
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<ul style="list-style-type: none">• Who should be included in planning this project?• Is there historical information that could be applied to this project? <p>Work Breakdown Structure</p> <ul style="list-style-type: none">• What phases can the project be broken into?• Who should be responsible for each phase?• Define the statement of work for each phase• What are the deliverables for each phase?• Do any of these phases require a change to the project scope?• Is there historical information that could be applied to this project?		
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<p>Activity Definition</p> <ul style="list-style-type: none">• Which activities need to be performed to complete each phase?• What is the start and end date of each activity?• Which activities are predecessor activities?• Which activities are successor activities?• What are the activity milestones?• Does completion of any of the activities require a change to scope? <p>Activity Sequencing</p> <ul style="list-style-type: none">• Map out the order of the activities using logical relationships and the predecessor/successor relationships identified in the activity definitions		
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<p>Activity Resource Estimating</p> <ul style="list-style-type: none">• What resources are needed to complete each activity (materials, tools, labor, skills, facilities, technology, services...)?• Is there historical information that could help in this estimation?• What are the lead times to acquire the resources?• Can these resources be aggregated across the project? <p>Activity Duration Estimating</p> <ul style="list-style-type: none">• How many work periods (hours, days, weeks) will each activity require?• What is the recommended time variance?• What is the confidence level in the estimate?• Is there historical information that can be applied to this project?		
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<p>Schedule Development</p> <ul style="list-style-type: none">• Combining and sequencing the activities will produce the project schedule (Great time to use Microsoft Project or some other electronic project management tool)• Resource plan/schedule will be produced by combining the activity resource estimates• Project calendar will be produced by integrating the activity duration estimates <p>Cost Estimating</p> <ul style="list-style-type: none">• Combining all of the activity resource costs will create the project cost estimate <p>Cost Budgeting</p> <ul style="list-style-type: none">• Aggregate the estimated costs into a cost baseline• Identify funding requirements and the internal processes for approval		
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<p>Quality Planning</p> <ul style="list-style-type: none">• Which quality standards are relevant to the project?• How will Quality Assurance/Quality Control be managed?• What quality metrics are applicable to the project?• What amount of quality reporting is needed?• What are the cost/quality tradeoffs?• Can quality be “built in” to the project with checklists?• How will you capture process improvements? <p>Human Resources</p> <ul style="list-style-type: none">• What are the roles and responsibilities of each member of the project team?• What are the levels of authority, responsibility and competency for each role?• Develop a project organization chart• What is the staffing management plan including		
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<p>timeline (acquisition, training, recognition, reward, compliance, safety, release)?</p> <p>Communications</p> <ul style="list-style-type: none"> • What communications do the stakeholders require? (mode, frequency, content, format) • Is there a common vocabulary or does one need to be created? • What ongoing communications is required internal to the project team? • Who on the team is responsible for communicating internally and externally? • How will performance be communicated? • How often will the project team meet? • What systematic form of communication will be utilized? 		
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<p>Risk Management</p> <ul style="list-style-type: none">• What is the risk tolerance of the project sponsor? Stakeholders?• How will we measure and assess risk?• Who will measure and assess?• How often?• Who will respond to risks? <p>Risk Identification</p> <ul style="list-style-type: none">• How will risk be defined and measured? By whom?• What are the potential risks in executing the project?• What will be our potential responses?• How will we discover the root cause of the risk? <p>Qualitative Risk Analysis</p> <ul style="list-style-type: none">• Can the risks be categorized? (duration, severity, internal/external, urgency, impact)• What is the relative ranking of all of the identified risks?		
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<ul style="list-style-type: none">• Are there risks that need further investigation? <p>Quantitative Risk Analysis</p> <ul style="list-style-type: none">• What is the probability of each risk?• What is the potential cost impact of each risk?• What is the potential time impact of each risk? <p>Risk Response</p> <ul style="list-style-type: none">• Can risks be prevented?• What would be the anticipated response for each risk?• Who is accountable for the response to each risk?• What are the contractual agreements related to risk that may apply to the project (insurance, vendor agreements, warranty)?		
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<p>Purchase and Acquisitions</p> <ul style="list-style-type: none">• Use previously created Activity Resource plan and Resource Schedule to list all necessary resources required• Determine the acquisition procedure for each type of resource• Coordinate and aggregate purchases• Create purchase/acquisition calendar incorporating lead times <p>Contracting</p> <ul style="list-style-type: none">• Identify procurement documents/requirements/contracts for external vendors• Create evaluation criteria for vendor selection (RFQs, RFPs) and coordinate with internal procurement function• Who is the legal resource for reviewing contracts?		
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3. Executing Process

Direct and Manage Project

- Using the Project Management Plan (which is all of the plans rolled together) oversee the project

Perform Quality Assurance

- Apply the planned, systematic quality plans to meet the overall quality requirements of the project

Acquire Project Team

- Obtain the necessary human resources using the Human Resources plan

Develop Project Team

- Improve the competencies and interaction of the project team members by executing the Human Resources plan

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<p>Information Distribution</p> <ul style="list-style-type: none">• Oversee the timely and accurate sharing of information by executing the Communications plan <p>Request Seller Responses</p> <ul style="list-style-type: none">• Obtain information, quotations, bids, offers and proposals using the purchase and acquisitions plan <p>Select Sellers</p> <ul style="list-style-type: none">• Review offers and select potential vendors by executing the Contracting plan		
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<p>4. Monitoring and Controlling Process</p> <p>Monitor and Control Project Work</p> <ul style="list-style-type: none">• Recommend corrective actions to address any variance to any part of the project plan• Recommend preventative actions for any anticipated obstacles and challenges• Forecast milestone completions and predecessor/successor activities• Evaluate and request changes to scope, sequence or any other project requirement <p>Integrated Change Control</p> <ul style="list-style-type: none">• Incorporate and communicate any change requests (approved or rejected)• Update and communicate any changes to the project management plan		
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<p>Scope Verification</p> <ul style="list-style-type: none">• Verify and accept completed deliverables against the scope <p>Scope Control</p> <ul style="list-style-type: none">• Update and communicate any approved changes to the project scope and work breakdown structure <p>Schedule Control</p> <ul style="list-style-type: none">• Update and communicate progress and changes to the previously established schedules• Recommend corrective actions for any schedule deficiencies• Update Project Plan <p>Cost Control</p> <ul style="list-style-type: none">• Update costs estimates, baselines and forecasts• Manage and communicate overall project budget		
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<p>Perform Quality Control</p> <ul style="list-style-type: none">• Monitor specific results in relation to published and agreed upon project quality standards <p>Manage Project Team</p> <ul style="list-style-type: none">• Track team member performance, provide feedback• Manage any team member conflicts• Assure delivery of developmental training <p>Performance Reporting</p> <ul style="list-style-type: none">• Prepare and distribute performance reports to stakeholders and related team member management <p>Manage Stakeholders</p> <ul style="list-style-type: none">• Communicate to satisfy the requirements of all identified project stakeholders• Address/resolve any issues raise by stakeholders		
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<p>Risk Monitoring and Control</p> <ul style="list-style-type: none">• Identify and track expected and experienced project risks• Execute response plans when risks occur <p>Contract Administration</p> <ul style="list-style-type: none">• Manage contracts and contract relationships by providing documentation and feedback to vendor• Document vendor performance against contractual obligations		
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5. Closing Process

Close Project

- Using the predetermined completion criteria and deliverables, verify that the requirements have been met and officially end the project with Project Sponsor sign off
- Conduct a Project Review meeting with entire project team to capture best practices, lessons learned and recognize team accomplishments
- Celebrate!

Contract Closure

- Verify that each vendor has completed all work and invoiced
- Close out all contracts by assuring payment of invoice and any sign offs/verification required by the contract

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