AMAZING Project Management

Course Workbook

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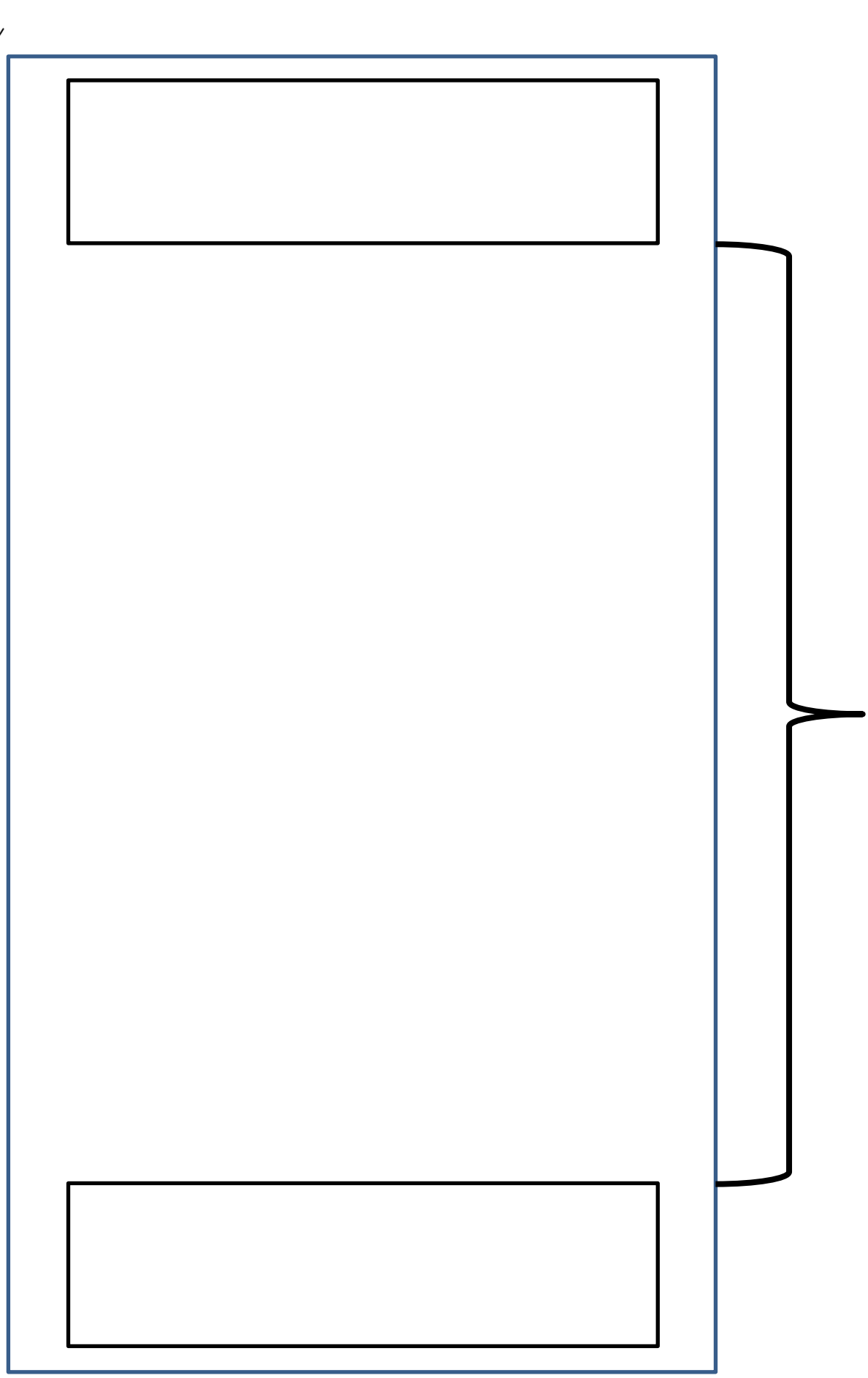
1.02 What is Project Management - Project Lifecycle

Purpose: To recreate the Project Lifecycle phases within the change context.

Fill in the blank template on the next page. Use this space to capture any notes or questions to follow up on.



2 Confirm Need Phase

INSTRUCTIONS: Review the three Confirm Need Checklists provided below. Identify the pros and cons of each and determine which would be more appropriate for your work environment and/or circumstances.

Checklist 1	
Pro	**Con**

Checklist 2	
Pro	**Con**

Checklist 3	
Pro	**Con**

Most appropriate for my work environment and why:

Checklist 1

General Considerations

• Who is the Project Sponsor(s)?
• Who are the intended users (ex: end users, managers, customers and staff)?
• How and where will the users access the system?
• Are there specific security requirements / considerations (ex: limits on who should access the data, information that should only be accessed by a certain individual or group)?
• Are there special usability considerations?
• Are there specific reporting requirements / considerations?
• Are there specific performance requirements / considerations (ex: peak processing cycles)?

Feasibility

• Is there a life expectancy for the product or service?
• Which technology is being considered and why?
• Is technology the best / appropriate solution or would business process reengineering be more appropriate?

Dependencies

• Do other initiatives need to be completed before this effort can provide value?
• Is this effort predicated on a yet to be determined product or service offering that may not materialize?
• Is this a long term or short-term solution?
• Will data sources be under development?

Constraints

• Will this effort need additional funding beyond what is available at this time?
• Will this effort require expertise or knowledge not readily available in the organisation?
• Does the proposed solution integrate with the organisation's platforms of choice?
• Will this solution fit into our existing infrastructure?
• Are there entities within the organisation that do not support this initiative?

Risks

• What are the potential risks of moving forward with this effort?
• What are the risks of not moving forward with this effort?
• Are there contractual agreements that must be considered with this solution?
• Are there methods available to mitigate any identified risks?

Checklist 2

1. Does the project align with organizational strategies (Y/N?)
2. Is there organisational support or acceptance of the project idea (Y/N?)
3. Is the level of project risk acceptable to the organisation (Y/N?)
4. Has an appropriate financial review been performed on this project - Return on Investments (ROI) or Net Present Value (NPV) (Y/N?)
5. Will this project's Deliverables produce Earned Value for the organisation (specify key project performance indicators) (Y/N?)
6. Does this project provide strategic enablement (or key project dependency) (Y/N?)

Checklist 3

Criteria	Scores
Project Success Potential	**High**: (=>80% probability of success*)* **Medium**: (60% to 80% probability of success) **Low**: (=< 60% probability of success*)*
ROI (Return on Investment)	**High**: >100% **Medium**: 65% - 100% **Low**: 0<65%
NPV (Net Present Value)	**High**: > $1 million **Medium**: $250,000 - $1 million **Low**: < $250,000
Future Cost Avoidance	**High**: > $1 million **Medium**: $250,000 - $1 million **Low**: < $250,000
Payback Period	**High**: <1 year **Medium**: 1 - 3 years **Low**: > 3 years
High Dependency	**High**: >=3 projects dependant on full or partial completion of this project **Medium**: 1 or 2 projects dependant on full or partial completion of this project **Low**: 0 projects dependant on full or partial completion of this project
Increase Efficiency / Opportunity for Standardization / Improve Security	**High**, **Medium**, **Low**: Degree to which project supports an operational efficiency strategy
Improve Customer Service	**High:** > 70%, **Medium:** 50-69%, **Low**: < 50% Opportunity to improve quality or response time associated with product or service
Obsolescence	**High**: (Currently out of support, No work-around, frequent failures or downtime) **Medium**: (Facing de-support < 1 year, Temporary business work around) **Low**: (Technology still considered current and / or supported, failures and downtime are rare)
Sunk Cost	**High:** >£5000, **Medium:** £3000-4999, **Low**: <£3000 A cost has already been incurred which cannot be recovered
High Visibility Project	**High**, **Medium**, **Low**: Chance the project will get positive and/or negative media and/or political attention
Funding or Spending Stipulations and Constraints	**High**: (Must meet time and spending requirement within 6 months) **Medium**: (Must meet time and spending requirements within 12 months) **Low**: (Must meet time and spending requirements > 12 months)
Regulation (National and International) / Security Risks	**High**: (Currently out of compliance with regulation)/ Security Risk with significant repercussions **Medium**: (Non-Compliance situation < = 1 year) / Security Risk with minimal repercussions **Low**: (Non-compliance situation > 1 year) / no security risk
Useful Life of Product / Service	**Long**: (> 7 years) **Medium**: (2-7 years) **Short**: (< 2 years)

3.01 Define Phase - Overview

INSTRUCTIONS: Practise defining the requirements of a project before starting the work by completing the following 'Catering Agreement Contract' for your next fictitious or real catered event.

CATERING AGREEMENT 'Contract'

This is a catering agreement **{"Agreement"}** executed this **{date}** day of **{month}**, **{year}**,		
Date:	Month:	Year:

BETWEEN

{CUSTOMER NAME}	
{Contact Info},	
*known for the purposes of this Agreement as **"Client,"***	

AND

{SUPPLIER NAME}	
{Contact Info},	
*known for the purposes of this Agreement as **"Caterer."***	

Client and Caterer agree to the following:

1. Services

1.1 Caterer agrees to provide services to the Client for **{basic description of event}**, known as the "Event," taking place on **{date}**.	Basic description of event:
	Date:
1.2 For this Event, Caterer agrees to provide the following: **{detailed description of what caterer will provide, such as food, decorations, cutlery, equipment, furniture, personnel, etc.}**.	Detailed description of what caterer will provide:

1.3 Client agrees to provide the following: **{anything else necessary for the Event that will be the responsibility of the Client, not of the Caterer}**.	Additional responsibilities of the Client:

2. Deposit

2.1 Client is required to pay a deposit of **{amount in Pounds Sterling}** upon signing this Agreement.	Deposit Amount:
2.2 Deposit **{is not refundable, is refundable if Client cancels within a certain amount of time, etc.}**.	Refundable / Non-refundable (circle one)

3. Payment

3.1 For the above services, Client will pay Caterer a total of **{amount of money, and its basis. This can be a set price for a certain menu, assuming a certain number of guests, or it can be a price per guest attending the event, or any other deal Client and Caterer agree to. Be specific, so that there are no hidden costs}**, including the deposit outlined in Section 1.	Amount of money, and its basis:
3.2 Client may request additional services, with the knowledge that these services will add to the total cost agreed upon by this contract, and must be agreed to in writing, either as an addendum to this Agreement, or in a separate document.	
3.3. The balance on the total cost for the Event is due **{at the end of Event, once all property has been returned to Client and/or Caterer, within 15 days of the Event, etc.}**.	Date or other arrangement:

4. Guests

4.1 Client agrees to provide Caterer with the total number of guests no later than **{number}** days before Event.	Total Number of days before Event:
4.2 Client agrees to break down the guest list into adults and children, and include any food allergies or special dietary requests, if applicable.	Estimated Number of Adults:
	Estimated Number of Children:
	Any Known Allergies:
	Any Known Dietary Requirements:

5. Menu

5.1 Client will **{provide his/her own menu, choose from Caterer's available options, etc.}**.	Own Menu / Caterer's Menu (Circle one)
5.2 Menu must be confirmed by **{length of time before the Event}**, or else Client will be subjected to **{penalty fee amount}**.	Length of time before the Event: Penalty fee amount:
5.3 Menu will be fixed, and no changes may be made, **{72 hours before Event, 24 hours before, etc.}**.	Date / time:

6. Cancellation Policy

6.1 Client may cancel this Agreement **{times when Client may cancel}**.	Times when Client may cancel:
6.2 Cancellation occurring **{length of time}** before Event will result in **{a total forfeiture of deposit, loss of 50% of deposit, etc.}**, as outlined in Section 2.	Length of time before Event: Conditions:

7. Arbitration

7.1 Should either party failure to provide or breach this Agreement in any way, the offending party will be liable for any damages.
7.2 Both parties agree to seek a third-party mediator or arbitrator for any disputes that arise as a result of this Agreement.

8. Jurisdiction

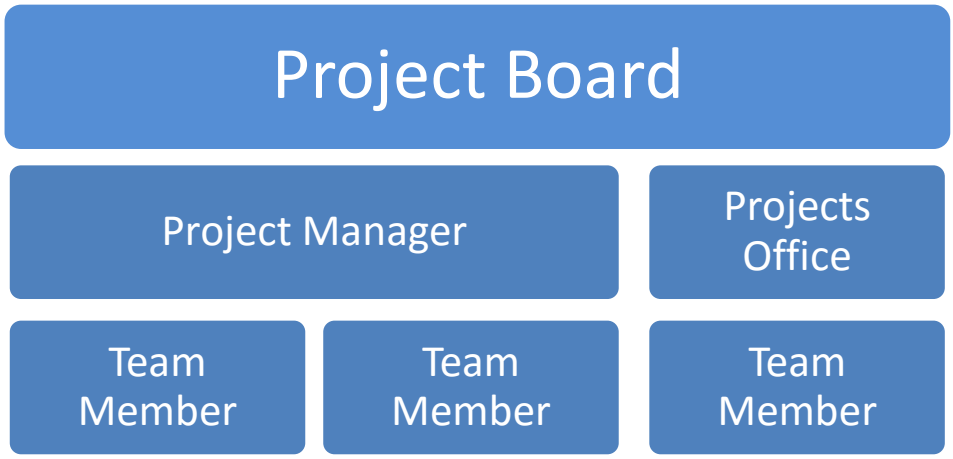
This Agreement falls under the jurisdiction of the County/Region of **{County/Region}**, and is therefore subject to all of **{County/Region's}** laws and regulations.	County/Region:

Signed:

Client Name	Client Signature
Date:	
Caterer Name	Caterer Signature
Date:	

3.02 Define Phase – Project Team

INSTRUCTIONS: Complete the Team Structure below for a current, previous or future project. Remember some roles can be shared.



Role	Responsibilities	Name
Sponsor (1 per project)	The Sponsor has ultimate responsibility for the success of the project; that it gives a return-on-investment and that the demands of the business, users and supplier are balanced. S/he will appoint people to the roles of User Representative, Supplier Representative to make up the Project Board and will appoint the Project Manager to run the project on a day-to-day basis. S/he will chair Project Board meetings and conduct briefings throughout. The Sponsor will closely monitor ongoing progress and changes to the project plan; and will eventually approve the project closure once satisfied that it is completed within agreed budgetary and scheduling tolerances.	
User Representative (as many as needed, could be combined with the Sponsor)	The User Representative specifies the needs of those who will use the product and monitors to ensure the solution will meet those needs. Their place on the Project Board is to represent the interests and requirements of the users as a whole. Sometimes the role may be shared, to cover different user interests, but splitting the role between too many people risks losing effectiveness. The User Representative will ensure that any testing has the appropriate user-focus and representation.	

Supplier Representative (as many as needed, could be combined with the Sponsor)	The Supplier Representative advises on the technicalities of the project; including method, design and strategy. They are the product specialists - they approve the Deliverable specifications and represent those who are designing and developing the Deliverables. The Supplier Representative exercise quality control and must ensure that any operating standards are defined and achieved. They will need to be able to brief other management staff on the technical aspects of the projects.	
Project Assurance (as many as needed, doesn't have to be delegated – the Project Board members could perform this function)	Project Board members are not a part of the project full-time and so place a lot of reliance on the Project Manager. They may assign Project Assurance functions (of reviewing, checking on and advising the Project Manager) to other people/person/group to ensure that the project is meeting its aims. Project Assurance as a role is in place to give the Board members confidence that they are being given accurate reports on the progress of the project and the expected quality of the output. The task of Project Assurance is given to individuals from the Project Board, but not the Project Manager or any of the Team Members.	
Project Manager (1 per project)	The Project Manager works on behalf of the Project Board to manage the ongoing project to agreed specifications and tolerances. S/he makes sure the final product is as agreed, to the required standard and within time and cost budgets. S/he is also responsible for ensuring the product will lead to the benefits outlined in the business case.	
Projects Office (as many as needed, could be performed by the Project Manager)	The Projects Office role is driven by the needs of the project and the Project Manager. The role can take the form of advice on project management tools to providing administrative services including paperwork or data collection.	
Team Members (as many as needed, could be performed by the Project Manager)	The Team Member role is often taken by the Project Manager on small / simple projects, but some larger or more complex projects may demand a specific role for a Team Member who has specialist knowledge of the Deliverable or who works in a more appropriate location than the Project Manager. The Team Member reports to the Project Manager but has responsibility to ensure the Deliverable is delivered in the time and budget specified.	

3.03 Define Phase – Project Scope

INSTRUCTIONS: **Step One:** Practise using the MoSCoW prioritisation technique on a list of Deliverables for a new Amusement Park.
Step Two: Use the Consideration Starter List to uncover and brainstorm even more Deliverables. Categorise under MoSCoW appropriately.

Amusement Park Project (list of Deliverables)

- Car Park / Parking Lot (for cars and coaches)
- Ticket booths (in-person)
- Ticket machines
- Entry gates
- Ticket scanners
- Security fences
- Security gates
- Emergency exits
- Roller coasters (from child friendly to extreme, including those involving water)
- Interactive water feature
- Entertainment arenas and/or Band stands
- Restaurants
- Food trolleys
- Shops
- Toilets
- Emergency centre (medical centre)
- Bus or train transport inside park
- Buggy / pram stations
- Drinking water fountains
- Queue management ropes
- Map centres / You are here maps
- Help points
- Firework area and launch pads
- Parade route(s)
- Garden areas
- Park benches
- Marketing bill boards
- Chosen theme (animated cartoon figure to regional oddity)
- Land use rights / planning permission
- Insurance policy(ies)
- Employment contracts
- IT Systems (Finance, Accounting, HR, POS, etc.) and IT infrastructure
- Electrical infrastructure (including alarm systems)

In Scope Deliverables **(products, outputs, 'things' that must be created or modified by the project team)**
Must Haves (These are required in order for the project to remain viable)
Should Haves (These are expected Without these, 'work arounds' are possible, but will be difficult)
Could Haves (These are possible, nice–to-have Deliverables. Without these, 'work arounds' are possible and easy/cheap)
Won't Haves (Out of Scope for this project, but may be needed in future projects or versions of this project) in Priority order. Or are acknowledged as part of BAU / Business Responsibilities

Considerations
(Starter List of possible actions that relate to the project that need to be decided if they are 'in scope' or 'out of scope')

- Land assessments (flooding, earthquakes, tornado, other natural disaster assessments)
- Buying of the land
- Hiring staff
- VIP test-run-through trial day
- Opening Day / Grand Opening
- Maintaining first 3 months
- Maintaining after 3 months
- Marketing
- Training staff
- Edit existing Contracts, Service Level Agreements (SLAs), Terms and Conditions, Job Descriptions to include reference to Amusement Park Deliverables
- Negotiations with Unions and/or management
- Negotiations with local residential and business communities
- Editing existing Business Processes to include Amusement Park in Corporate Target Operating Model (TOM) or Blueprint

- **Can you think of any others?**

3.04 Define Phase – Quality Strategy

INSTRUCTIONS: Match the Quality Expectation with the best description of Quality Effort required by the project team to deliver it. See reminders of different types of tests and testing practises below.

In-process reviews (during the product development)	*Appraisal reviews (after the completion of the product development)*
Examples: *Checks* *Calibrations* *Automation* *Workshops* *Surveys*	***Examples:*** *Testing* *Quality Inspection*

Quality Expectations	**Quality Effort required**
1. Product is green 2. Product has no grammatical mistakes 3. Product reflects company brand image by complying with all company branding standards 4. Process completes in less than 5 seconds 5. Product functions with 100% accuracy for 2 years and a minimum of 80% accuracy between 2-5 years 6. Product with 0 defects	A. ***Development***: Team Member must have accurate timing device. ***Testing***: Minimum of one in-process calibration test and one appraisal calibration test. Testers must have accurate timing device and expertise in the process. B. ***Development***: Team Members must conform to strict quality standards and self-test each step of production. ***Testing***: Weekly in-process checks to include automations, calibrations, reviews and inspections. Three rounds of appraisal tests. C. ***Development***: Team Member has marketing expertise and access to company policies. ***Testing***: Minimum of one in-process workshop review and one inspection. Minimum of one appraisal inspection. Testers must have marketing experience. D. ***Development***: Team Member must have editorial skills and proficiency in the language ***Testing***: Minimum of one appraisal automation spelling check and grammatical check. Minimum of one appraisal document review. Inspector must be proficient in the language. E. ***Development***: Team Member must not be colour blind. ***Testing***: One appraisal visual inspection. Inspector must not be colour blind. F. ***Development***: Team Members use certifiable materials in production. ***Testing***: Weekly and monthly in-process checks, calibrations and automations. Minimum of 5 appraisal reviews of tests, automations and inspections. Testers must have extensive skills and knowledge of certifiable materials and industry practises.

3.05 Define Phase – Communications Plan

INSTRUCTIONS:
- Brainstorm 10 stakeholders for the project scenario provided below.
- Identify Stakeholders and their interest areas (use the Start List for inspiration)
- Map the Stakeholders onto the influence/impact matrix based on their influence and impact on the project.
- Use this analysis of the Stakeholders to start to form a strategy for what key messages need to be communicated with each Stakeholder.

Project Scenario

Project Title: Project Management Control System (PMCS) Date: April 7, 20xx

Scope and Objectives: The Local Area Information Systems Company is undergoing rapid change and growth resulting in an urgent need for a more efficient use of capital funds and for managing our many projects. To this end, we are implementing a new project management control system that will satisfy both these needs and will enhance our project teams' ability to better focus on our customers' requirements.

General Objectives:
- Enable better communication among project, group, and corporate management with regard to progress of major projects.
- Enable senior management to more closely monitor progress of major projects.
- Provide project personnel the capability to manage and control their projects.

Specific Objectives:
- Reporting and Control System
- For communication of project activity within and between groups and senior management
- Initially for high-cost projects, then for "critical," then for all projects
- Computer Support Systems
- Survey with recommendations to determine the amount and cost of computer support
- Procedures Manuals
- Document procedures and policies
- Preliminary manual available for operator and user training
- Project Management Training Course
- Provide basic project planning and control skills to personnel directly involved in project management
- Follow-on courses to provide software, financial, and contracting skills needed by project managers

Defining Conditions, Constraints, and Assumptions: The PMCS must be operational on the last day of this year. The first phase of this project is a technical survey and a feasibility study with a go/no-go decision point at the conclusion of the study. Implementation of the PMCS will commence six months later, if the recommendation is to proceed.

Stakeholder Identification

Interest areas-------→ Stakeholders:	Recommendation outcome	Progress information	Financial reporting	Risks and Issues reporting	Quality check reporting	Procedural changes	IS Technical changes	HR and Staffing level changes	Reporting changes	Document and policy changes	Technical specifications	User requirements	Number of projects converted	Number of people trained	Launch date
1. Project Board	X	X	X	X	X										X
2.															
3.															
4.															
5.															
6.															
7.															
8.															
9.															
10.															

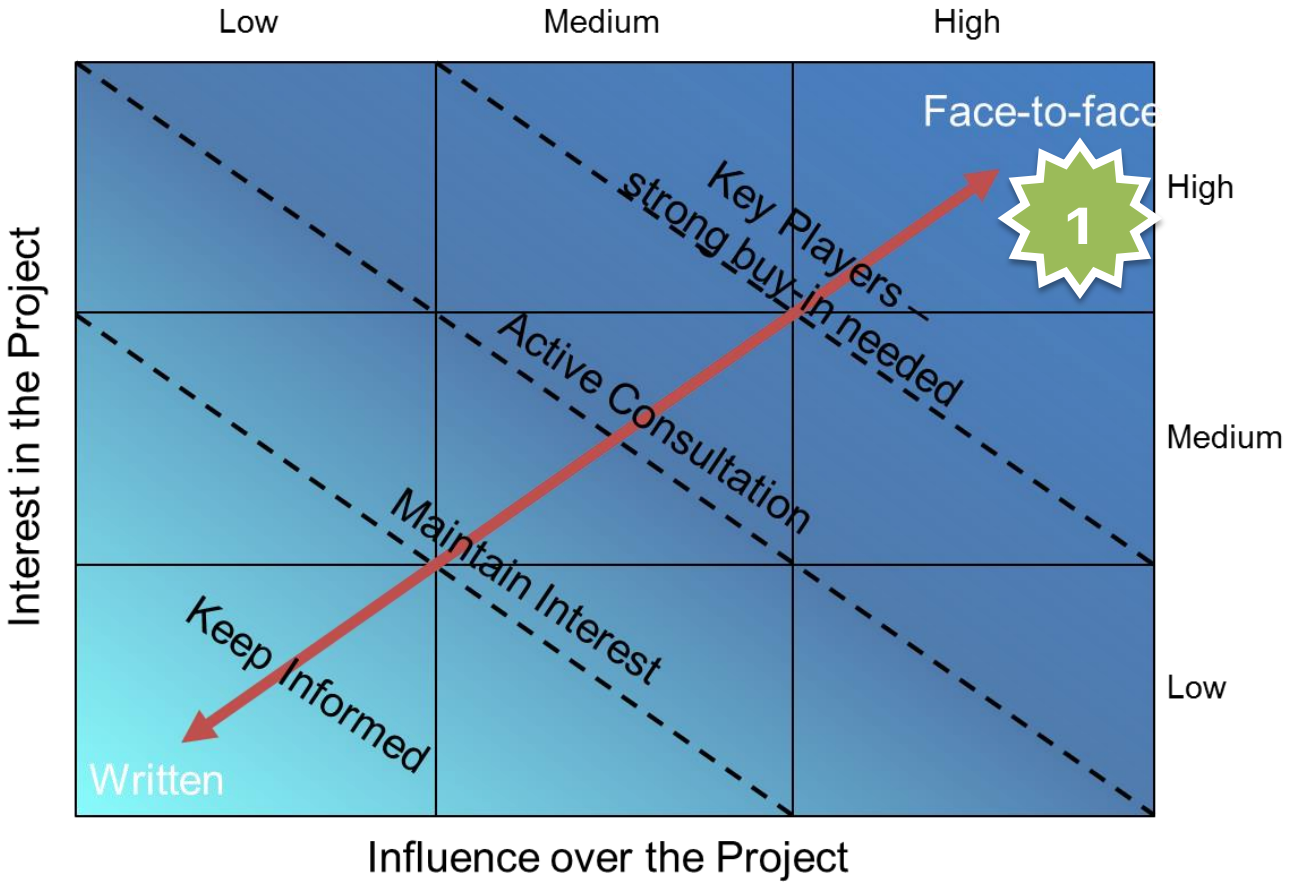
STARTER LIST: Ideas who the stakeholders might be:
INTERNAL STAKEHOLDERS: - Project Managers - Projects Office / support staff - ***Project Boards*** - Corporate Board - IT department staff - Legal department staff - HR department staff

EXTERNAL STAKEHOLDERS:
- Customers / Clients
- Suppliers – external suppliers
  o Training company
  o Software suppliers
  o Hardware suppliers
- Suppliers – internal suppliers
  o IT department

DECISION MAKING STAKEHOLDERS / GOVERNANCE STAKEHOLDERS: - Regulators - Auditors - Steering committees - Board of Directors
OPINION FORMERS: - National Media - Local press - Financial Analysts - Union representatives - Recruitment firms - Competitors

Stakeholder Analysis

Plot stakeholders (1-10) onto grid



Identify Key Messages for each stakeholder (1-10):

1. Project Board **Key Message:** Regular progress information, not only about time, but cost, quality, issues and risks compared to the aggressive six month timeline.
2.
3.
4.
5.
6.
7.
8.
9.
10.

3.06 Define Phase – Project Plan

INSTRUCTIONS: Practise long term planning using your own personal goals.

- Brainstorm 10 goals you want to achieve in 12 months' time. Be very specific. Use past tense as if these goals have already been achieved.
- Pick ONE of these goals – the one that will make the biggest impact on your life.
- For 10-15 minutes, brainstorm every activity you can think that you need to do to accomplish this goal. Do not stop before the 10 minutes is up and do not go beyond the 15 minute limit
- Reorder and group activities around Deliverables, types of work and/or themes
- Schedule and prioritise activities over a 12 month plan
- Take your first action today.

Brainstorm 10 goals you want to achieve in 12 months' time. Be very specific. Use past tense as if these goals have already been achieved.
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

- Pick ONE of these goals – the one that will make the biggest impact on your life.
- For 10-15 minutes, brainstorm every activity you can think that you need to do to accomplish this goal. Do not stop before the 10 minutes is up and do not go beyond the 15 minute limit

○ Re-order and group activities around Deliverables, types of work and/or themes

- Schedule and prioritise activities over a 12 month plan – colour in or shade start and end of each activity

Activity	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12

3.07 Define Phase – Business Case

INSTRUCTIONS: Practise building a case for a project – choose from personal or work related projects, such as going on a holiday, taking this course, your next work project.

Business Case for Project: _____.

Reasons (The rationale for doing the project in the first place)	What is the problem to fix? Or What is the opportunity to take advantage of? Or Describe how there is an opportunity and problem?	
Business Options (This section demonstrates that all possible options have been considered and the recommended one is the best)	Do nothing to solve the problem and/or take advantage of the opportunity • Is this the recommended option? If not, why not? Do the minimal to solve the problem and/or take advantage of the opportunity • Is this the recommended option? If not, why not? Do something to solve the problem and/or take advantage of the opportunity • Is this the recommended option? If not, why not? (There may be several 'Do something options' considered) • Is this the recommended option? If not, why not? Which is the recommended option? (the rest of the Business Case will support the recommended option).	

Expected Benefits (MEASURABLE improvements resulting from doing the project. If they are not measurable they are not included in the justification for doing the project.)	Measurable Improvement – what is the starting point or 'as is' measurement, what is the expected improvement, when is it expected? There could be several benefits – each will need to be listed and explained	Current measurement: Measurable improvement expected: By when:
		Current measurement: Measurable improvement expected: By when:
		Current measurement: Measurable improvement expected: By when:
		Current measurement: Measurable improvement expected: By when:

Timescales (Both the project timescales and the benefits timescales)	How long will the project take?	
	How long will benefits be measured as a result of this project?	
Costs (Both the project costs and the ongoing maintenance and operations costs)	How much money will the project incur?	
	How much money is needed after the project to sustain the change after the project (and where is this funding coming from)?	
Major Risks (The major potential problems that could / might / may occur on the project and stop or impair the project)	What are the major potential problems that may arise during the project?	
	What are the major potential opportunities that may arise during the project?	

3.08 Define Phase – Risks

INSTRUCTIONS: Complete the Risk Register entry for an example project risk.

Project Risk: After her initial review, Jenny form IT has concerns that the old IT system has several major flaws. The current data may be of such poor quality, we might not be able to convert it into our new system, as part of our migration project. The company relies on keeping historical data of all its customers, their purchasing history and projected purchasing developments. There are also industry regulators who require this data to be kept compliant with their storage and retention policies.

Risk identification number	A unique reference for every risk in the Risk Register (typically numeric or alpha-numeric)		
Risk author	The person who raised the Risk		
Date registered	The date the Risk was identified		
Risk Description	<u>Cause – Event – Effect:</u> Cause (root cause for the risk) Event (the uncertain event that may happen as a result) Effect (the impact on the project if it did occur)		
Probability	How likely the Risk is to occur (High, Medium, Low)		
Impact	The impact on the project if the Risk did occur in measurable terms (High, Medium, Low)		
Value	Probability x Impact		
Proximity	How soon in time is the risk likely to occur? (imminent / at any time, within the stage, within the project)		
Responses Considered	**<u>Threats</u>** • Avoid • Reduce • Contingency • Transfer • Share • Accept	**<u>Opportunities</u>** • Exploit • Enhance • Contingency • Transfer • Share • Accept	

Responses Chosen	Chosen actions to resolve the risk. There may be more than one action per Risk.	
Residual Risk	Estimated size of the Risk after the chosen actions will be implemented. Only Avoid eliminates the Risk. All others only treat it.	
Risk Status	Active Or Closed	
Risk Owner	The person responsible for managing the Risk	
Risk Actionee	The person(s) who will implement the Chosen Risk Response action(s). This may or may not be the same person as the Risk Owner.	
Cross references to plans and associated risks	In which plan(s) are the Chosen responses allocated in?	
	Is this Risk linked to any other Risk?	

4.01 Plan Phase – Overview (formal)

INSTRUCTIONS: Review the Work Breakdown Structure provided of an existing plan for an office move.

PART A:
- Add Quality Planning activities (e.g., number and types of quality checks, audits and reviews associated with these project activities).
- Estimate resources to be used (e.g., the number and types of people, skills, money and/or time required).

PART B:
- Finally, determine the level of management that will be required to keep control over this plan.

PART A: OFFICE MOVE		
Project Activities	**Quality Activities**	**Resource estimate(s) for Quality Activities**
1. Requirements definition		
Perform analysis of potential locations (best in terms of customers, employees, taxes, insurance, etc.)	**EXAMPLE:** • Formal review of the analysis (especially any financial information provided) • Check of the process used to perform the analysis to make sure it was suitable	**EXAMPLE:** • Financial expertise – 1-2 days • Process expertise – several hours
Define physical structure requirements	**EXAMPLE:** • Architectural review of requirements	**EXAMPLE:** • Architecture expertise – 2 days
Define staffing plan	**EXAMPLE:** • HR review of plan	**EXAMPLE:** • HR and staffing expertise – 2-5 days

Project Activities	Quality Activities	Resource estimate(s) for Quality Activities
2. Site selection		
Negotiate contract or lease for new facility		
Sign contract or lease for new facility		
Notify existing site		
3. Office design		
Document office design requirements **Interior** (Computer room, Product lab, Offices, Boardroom Meeting Rooms, Cubicles, Reception, Open areas, Employee areas, WCs) **Exterior** (Entry way, Car Park)		
Document interior design requirements (Lighting, Flooring, Walls / partitions, Furnishings, Fittings)		
4. Construction build out		
Obtain planning permissions		
Bid process – vendor selection		
Bid process – sign vendor contracts		
Construct exterior		
Construct interior		

PART B: Describe the level of management required to keep control over the plan.	
Management activities to keep control over the plan (Including reports, meetings, decision points, etc.)	Frequency and timings

4.01 Plan Phase – Overview (informal)

INSTRUCTIONS: Write a plan (task list) for yourself for a relatively straightforward task you perform nearly every day

- Choose from the following options ***or come up with one of your own***:
  - Getting to work in the morning
  - Going for lunch
  - Reading and replying to emails
  - Booking a room for a meeting
  - Scheduling time with your manager
- Review the list and identify at least 3 risks associated with the plan

Name of process / task:	
Input required to perform task:	
No.	***Activities***
1.	
2.	
3.	
4.	
5.	
Output from performing task:	

Risks Identified:
1.
2.
3.

4.02 Plan Phase – Steps to planning

INSTRUCTIONS: Practise estimating timescales using simple tasks.

- Choose an activity - You can choose from the list of activities below or use your own.
- Estimate using Single-point estimating.
- Estimate using Three-point estimating (best done by asking others for their input)
- Investigate online if there is any historical data on timings of your chosen activity. Capture this under Comparative estimating.
- For items on the list of activities, there are no industry standards for estimates. If you have chosen an activity not on the list, investigate if there are any industry standards or empirical data to provide you with an estimate.
- Evaluate your estimates.

Activities to estimate

- Write your name with non-dominant hand
- Stand up and sing your national anthem
- Do two jumping jacks / star jacks
- Hum happy birthday, the song

Activity:

Single-point estimating	Three-point estimating	Comparative estimating
Best guess based on past experience and knowledge about this task.	Best used by speaking to others – who may be naturally optimistic or pessimistic. If not, use best case scenario, most likely scenario and worst case scenario to achieve the three estimating points. Plug estimates into the following formula: OE: optimistic estimate, MLE: most likely estimate PE: pessimistic estimate (OE + 4MLE + PE) / 6	Previous historical data. Investigate online or with discussion from others who have attempted this task in the past and have captured historical data.

Parametric estimating – using empirical data or industry standards. Are there any for this task?

Evaluate: Which of the estimates is the 'best' and why?

5 Do Phase

INSTRUCTIONS: Practise delegating simple tasks.

- Choose an activity to delegate. You can use an activity off the list provided or choose your own. It should be a fairly straightforward task.
- Delegate this activity to someone (friend, family member or colleague).
- THEY ARE NOT TO DO THE ACTIVITY. This is just to allow you practise in delegation.
- The person being delegated to needs to understand the scope of the work/task, including how the work will be monitored and quality checked, and agree to the conditions (or negotiate the terms until they can agree). Simply discuss and agree on the specifics, as if they were going to do the work (e.g., total time, start and end times, effort, quality levels expected, reporting requirements, etc.)

Activities to be delegated and agreed (OR CHOOSE ONE OF YOUR OWN):

- Write your name with non-dominant hand
- Stand up and sing your national anthem
- Do two jumping jacks / star jacks
- Hum happy birthday, the song
- Check email on a handheld device
- Rearrange three chairs in the room

Activity being delegated:	
Total time to do the activity:	
Start Time:	
End Time:	
Quality levels expected - • Description of quality levels expected from the work in ***measurable*** terms	
Quality checks during the work - • Description of how quality levels will be checked ***during*** the work	
Quality checks after the work - • Description of how quality levels will be checked ***after*** the work	
Progress reporting requirements – • ***how*** will progress be reported during the work? • And ***how often*** will progress need to be reported during the work?	
Issues and Problems – • ***how*** will issues or problems be reported or escalated?	

6 Review Phase (formal)

INSTRUCTIONS: practise capturing lessons learned formally.

- Reflect on and answer the following questions about your own project management experiences.

What one piece of advice would you have appreciated before you took on your last project role?
Logistically, how can you pass those words of wisdom on to another project manager about to do something similar?
What management activities or company structures (policies, procedures, cultural norms and behaviours) would help you disseminate and circulate this information to others?

6 Review Phase (informal)

INSTRUCTIONS: Practise capturing lessons learned informally.

- Complete the template provided for the following experiences:
  - Your last post in a previous job.
  - The last meal out you had.
  - The last film you saw.
  - The last book you read.
- For each item, indicate what went well and what went badly.
- For each item, indicate what you would do differently if you had to do it over again.

Review Item	What went well?	What went badly?	What would you do differently next time?
Previous Job			
Last meal out			
Last film seen			
Last book read			

7 Close Phase

INSTRUCTIONS: Practise conducting an official handover of project Deliverables
- Choose three products from the list below.
- Explain how to handover the Deliverables to a Business Owner(s).

List of Deliverables

1. ***USED IN EXAMPLE BELOW:*** ***Training course materials for future new staff training - valid until system is changed or replaced (electronic and paper-based)***
2. User guide for new computer system - valid until system is changed or replaced (electronic and paper-based)
3. Contract with third party supplier - expires in three years (electronic and paper-based)
4. Server purchased during project. Warrantee is still valid for next five years (physical server & physical warrantee)
5. Marketing materials scheduled to be used over the next four months
    a. Television advertisement (DVD)
    b. Magazine ad (electronic and paper-based)
    c. Newspaper ad (electronic and paper-based)
    d. Radio Ad (audio file)

EXAMPLE:

ID	Information to be handed over with the deliverable	Steps to take to handover ownership	Open risks and issues associated with the deliverable
1	○ Deliverable Description (or user requirements that were used to create the Deliverable; which not only indicate what the purpose was, but the minimum acceptable criteria that this Deliverable has met in its testing activities) ○ Any configuration management information about the Deliverable (e.g., Version Number, Who has a copy of this, Where it is currently stored both physically and electronically, and any related products that will need to change if this Deliverable changes and vice versa – if the new computer system changes then this Deliverable will also need to change)	○ Meet with new Business Owner ○ Physically hand over the physical copy ○ Either send link to the electronic copy (if stored in a document management system) or email electronic copies to the new Business Owner ○ Review all the files (training slides, delegate packs, trainer notes, etc.) ○ Review all the additional information (see previous column)	○ The new computer system may not be in place long (as technology changes exponentially), so this would need to be updated or replaced (RISK) ○ There is a known bug in the graphics on page 3 of the electronic version causing some printers to print it slightly off centre. (ISSUE)

ID	Information to be handed over with the deliverable	Steps to take to handover ownership	Open risks and issues associated with the deliverable

ID	Information to be handed over with the deliverable	Steps to take to handover ownership	Open risks and issues associated with the deliverable

NOTES:

8 Realise Benefits Phase

INSTRUCTIONS: Practise planning for benefit realisation
- Review the list of benefits provided.
- Choose three of the benefits and explain how you would set up, monitor and measure each of the benefits, using the template provided.

List of Benefits

1. ***USED AS AN EXAMPLE BELOW*: Improved revenue.** By selling the new product line, Organisation X will increase revenue by 15% over the next three years.
2. **Reduced costs.** By using the new automated procedures, department X will run at 40% less operating costs.
3. **Policy or legal compliance.** By applying regulation 'IGGabc001' to all working practices, Company X will satisfy legal requirements from the International Governing Group of ABC.
4. **Process Improvements.** By outsourcing the Department X function, Government Body X will produce at the same operating levels for 20% less costs.
5. **Enhanced quality of service.** By improving response rates to customer queries, Small Business X will reduce the number of customer complaints by 15%, reducing back end administrative costs by £25,000 per annum.
6. **Reduced environmental impact.** By changing to flexible working practises, Company X will reduce its carbon footprint by 5% within 12 months.
7. **Internal performance improvement.** By adopting a new project prioritisation scheme, Organisation X will make better decisions about commissioning and/or stopping poorly rated projects, resulting in a cost savings of £50,000 per annum over the next 5 years.
8. **Enhanced HR Management.** By improving staff morale, Department X will increase productivity by 25% over two years.

Set up system(s) or process(es) to monitor and measure, include mechanism to capture current/baseline/as is measure	**How to monitor this benefit to ensure it is heading in the predicted trajectory**	**How to measure the benefit** **How long to measure the benefit for**
EXAMPLE: **Improved revenue**. By selling the new product line, Organisation X will increase revenue by 15% over the next three years.		
○ Adjustments to the Sales Report to include the new product line will need be made ○ Existing Revenues Report will show revenues for baseline measure	○ The Sales Report can be pulled / printed on a monthly basis for comparisons of month-to-month activity. Trajectory should go UP as the starting point is zero ○ Revenues Report can be pulled on a monthly basis to monitor. Trajectory should go UP with the inclusion of new product line sales.	How to measure the benefit ○ Compare year on year revenues using Revenues Report How long to measure the benefit for ○ Pull / print Revenues Report for comparison for three years
BENEFIT:		

Set up system(s) or process(es) to monitor and measure, include mechanism to capture current/baseline/as is measure	**How to monitor this benefit to ensure it is heading in the predicted trajectory**	**How to measure the benefit** **How long to measure the benefit for**
BENEFIT:		
BENEFIT:		