



**AMAZING Project Management**

**Course Workbook**

**SUGGESTED ANSWERS**

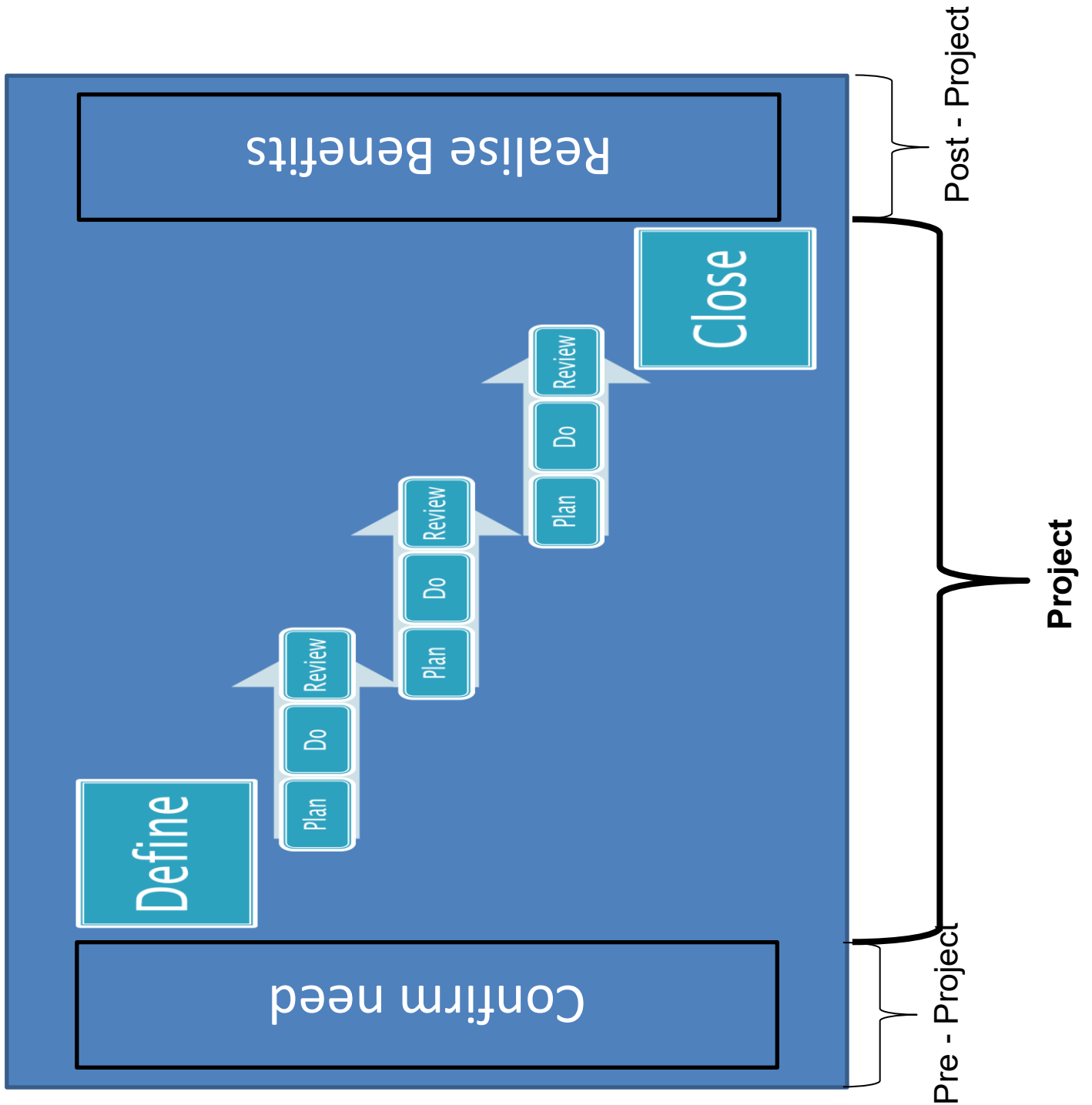


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## 1.02 What is Project Management - Project Lifecycle





## 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	
Pros	Cons
<ul style="list-style-type: none"><li>Lots of questions to consider project from different angles</li><li>Lots of questions to ensure business understand what they are getting and what they are giving up to get it</li><li>Various stakeholders opinions and perspectives considered</li></ul>	<ul style="list-style-type: none"><li>No way to tell which question(s) are more important than others</li><li>Not easy to compare different project ideas</li><li>Not easy to prioritise projects based on results</li></ul>

Checklist 2	
Pros	Cons
<ul style="list-style-type: none"><li>Easy to use</li><li>Simple</li><li>When time and/or resources are tight, and need a quick and easy way to determine the 'worthiness' of a project idea</li><li>Answers all the basic questions</li></ul>	<ul style="list-style-type: none"><li>None of the questions are weighted – implying that if one idea gets 4 yeses, it would automatically beat out a project idea getting 3 yeses (even if those 3 yeses were more important to the organisation than the other 4)</li><li>Not easy to compare different project ideas</li><li>Not easy to prioritise projects based on results</li></ul>

Checklist 3	
Pros	Cons
<ul style="list-style-type: none"><li>Thorough</li><li>Graded answers - not yes/no and not lengthy text</li><li>Considers multiple stakeholder perspectives</li><li>Ensures organisation understand the severity / impact of the project</li></ul>	<ul style="list-style-type: none"><li>No way to tell which consideration(s) are more important than others</li><li>Not easy to compare different project ideas</li><li>Not easy to prioritise projects based on results</li></ul>

**Most appropriate for my work environment and why:**

“In my work environment, we are very ‘immature’ in project management and so even though Checklists 1 and 3 offer more thorough analysis, Checklist 2 is easier to use and therefore easier to get the business on board with using a checklist.”



### 3.01 Define Phase - Overview

#### CATERING AGREEMENT ‘Contract’

This is a catering agreement <b>{“Agreement”}</b> executed this <b>{date}</b> day of <b>{month}</b> , <b>{year}</b> ,		
Date: <b>17</b>	Month: <b>January</b>	Year: <b>20xx</b>

BETWEEN

<b>{CUSTOMER NAME}</b>	<b>Jo Smith</b>
<b>{Contact Info}</b> ,	<b>+44(0) xxx1234567</b>
<i>known for the purposes of this Agreement as <b>“Client,”</b></i>	

AND

<b>{SUPPLIER NAME}</b>	<b>Catering X Co</b>
<b>{Contact Info}</b> ,	<b>+44(0) xxx9876543</b>
<i>known for the purposes of this Agreement as <b>“Caterer.”</b></i>	

**Client and Caterer agree to the following:**

#### 1. Services

1.1 Caterer agrees to provide services to the Client for <b>{basic description of event}</b> , known as the “Event,” taking place on <b>{date}</b> .	Basic description of event:  <b>Birthday celebration for the boss of the company, attended by all the office staff and their families</b>
	Date:  <b>17 June 20xx</b>
1.2 For this Event, Caterer agrees to provide the following: <b>{detailed description of what caterer will provide, such as food, decorations, cutlery, equipment, furniture, personnel, etc.}</b> .	Detailed description of what caterer will provide: <b>3 course dinner</b> <b>Tables</b> <b>Chairs</b> <b>Table cloths</b> <b>Cutlery</b> <b>Serving dishes</b> <b>Cake stand</b> <b>Professional servers</b> <b>Set up</b> <b>Clean up</b>



<p>1.3 Client agrees to provide the following: <b>{anything else necessary for the Event that will be the responsibility of the Client, not of the Caterer}</b>.</p>	<p>Additional responsibilities of the Client:</p> <ul style="list-style-type: none"> <li><b>Birthday cake</b></li> <li><b>Birthday candles</b></li> <li><b>Decorations</b></li> <li><b>Flowers</b></li> <li><b>Table decorations</b></li> </ul>
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## 2. Deposit

<p>2.1 Client is required to pay a deposit of <b>{amount in Pounds Sterling}</b> upon signing this Agreement.</p>	<p>Deposit Amount:</p> <p><b>£500</b></p>
<p>2.2 Deposit <b>{is not refundable, is refundable if Client cancels within a certain amount of time, etc.}</b>.</p>	<p>Refundable / <b>Non-refundable</b> (circle one)</p>

## 3. Payment

<p>3.1 For the above services, Client will pay Caterer a total of <b>{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}</b>, including the deposit outlined in Section 1.</p>	<p>Amount of money, and its basis:</p> <ul style="list-style-type: none"> <li><b>£70 per adult</b></li> <li><b>£30 per child</b></li> <li><b>Price includes 2 glasses of wine per adult.</b></li> </ul>
<p>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.</p>	
<p>3.3. The balance on the total cost for the Event is due <b>{at the end of Event, once all property has been returned to Client and/or Caterer, within 15 days of the Event, etc.}</b>.</p>	<p>Date or other arrangement:</p> <p><b>30 days from Event</b></p>



**4. Guests**

4.1 Client agrees to provide Caterer with the total number of guests no later than <b>{number}</b> days before Event.	Total Number of days before Event: <b>10 business days</b>
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: <b>40</b>
	Estimated Number of Children: <b>12</b>
	Any Known Allergies: <b>1 child gluten-free</b>
	Any Known Dietary Requirements: <b>6 adult vegetarians 1 adult vegan</b>

**5. Menu**

5.1 Client will <b>{provide his/her own menu, choose from Caterer’s available options, etc.}</b> .	<del>Own Menu</del> / <b>Caterer’s Menu</b> (Circle one)
5.2 Menu must be confirmed by <b>{length of time before the Event}</b> , or else Client will be subjected to <b>{penalty fee amount}</b> .	Length of time before the Event: <b>5 days</b>  Penalty fee amount: <b>£10 per alteration per person effected</b>
5.3 Menu will be fixed, and no changes may be made, <b>{72 hours before Event, 24 hours before, etc.}</b> .	Date / time: <b>24 hours before Event</b>



### 6. Cancellation Policy

6.1 Client may cancel this Agreement <b>{times when Client may cancel}</b> .	Times when Client may cancel: <b>2 months before Event</b>
6.2 Cancellation occurring <b>{length of time}</b> before Event will result in <b>{a total forfeiture of deposit, loss of 50% of deposit, etc.}</b> , as outlined in Section 2.	Length of time before Event: <b>&gt; 2 months before Event</b> Conditions <b>50 % refundable</b> : Length of time before Event: <b>&lt; 2 months before Event</b> Conditions <b>0 % refundable</b>

### 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 <b>{County/Region}</b> , and is therefore subject to all of <b>{County/Region's}</b> laws and regulations.	County/Region: <b>England, UK</b>
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### Signed:

Client Name	Client Signature
<b>Jo Smith</b>	<i>Jo Smith</i>
Date: <b>17 Jan 20xx</b>	
Caterer Name	Caterer Signature
<b>Emily Mason</b>	<i>Emily Mason</i>
Date: <b>17 Jan 20xx</b>	





### 3.02 Define Phase – Project Team

Role	Responsibilities	Name
<b>Sponsor</b> (1 per project)	<p>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.</p> <p>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.</p> <p>S/he will chair Project Board meetings and conduct briefings throughout.</p> <p>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.</p>	<b>Manager (VP)</b> <b>Customer Service Department</b>
<b>User Representative</b> (as many as needed, could be combined with the Sponsor)	<p>The User Representative specifies the needs of those who will use the product and monitors to ensure the solution will meet those needs.</p> <p>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.</p> <p>The User Representative will ensure that any testing has the appropriate user-focus and representation.</p>	<b>Manager (VP)</b> <b>Customer Service Department</b> <b>(small project, so combining roles – one person to do both)</b>
<b>Supplier Representative</b> (as many as needed, could be combined with the Sponsor)	<p>The Supplier Representative advises on the technicalities of the project; including method, design and strategy.</p> <p>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.</p> <p>They will need to be able to brief other management staff on the technical aspects of the projects.</p>	<b>Manager (VP)</b> <b>IT Department</b>
<b>Project Assurance</b> (as many as needed, doesn't have to be delegated – the Project Board members could perform this function)	<p>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.</p> <p>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.</p> <p>The task of Project Assurance is given to individuals from</p>	<b>Assistant Manager</b> <b>Customer Service</b>  <b>and</b>  <b>Manager (VP)</b> <b>IT Department</b>



	the Project Board, but not the Project Manager or any of the Team Members.	
<b>Project Manager</b> (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.	<b>PM from Customer Service Department</b>
<b>Projects Office</b> (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.	<b>3 resources from the Project Support Office</b>
<b>Team Members</b> (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.	<b>2 Customer Service specialists to work on the user and functional requirements documentation</b>
		<b>4 IT specialists to work on the IT upgrade</b>
		<b>1 HR specialist to work on the job description and terms and condition modifications</b>
		<b>1 legal specialist to document the new company policy</b>
		<b>1 Sales and Marketing specialist to create the marketing materials</b>



### 3.03 Define Phase – Project Scope

#### 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)

- Car Park / Parking Lot (for cars and coaches)
- Ticket booths (in-person)
- Entry gates
- Security fences
- Emergency exits
- Restaurants
- Toilets
- Emergency centre (medical centre)
- Drinking water fountains
- Queue management ropes
- Map centres / You are here maps
- Help points
- 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)

##### FROM CONSIDERATIONS LIST:

- Hiring staff
- Training staff
- Edit existing Contracts, Service Level Agreements (SLAs), Terms and Conditions, Job Descriptions to include reference to Amusement Park Deliverables
- Opening Day / Grand Opening

##### Should Haves

(These are expected

Without these, 'work arounds' are possible, but will be difficult)

- Ticket machines
- Ticket scanners
- Security gates
- Roller coasters (from child friendly to extreme, including those involving water)
- Shops
- Bus or train transport inside park
- Buggy / pram stations
- Park benches

##### FROM CONSIDERATIONS LIST

- VIP test-run-through trial day



### Could Haves

(These are possible, nice-to-have Deliverables.

Without these, 'work arounds' are possible and easy/cheap)

- Interactive water feature
- Entertainment arenas and/or Band stands
- Food trolleys
- Firework area and launch pads
- Parade route(s)
- Garden areas
- Marketing bill boards

### 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.

### **BUSINESS AREAS (BAU) RESPONSIBILTIES:**

- Land assessments (flooding, earthquakes, tornado, other natural disaster assessments)
- Buying of the land
- Maintaining first 3 months
- Maintaining after 3 months
- Marketing
- 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



### 3.04 Define Phase – Quality Strategy

1.	<b>E</b>
2.	<b>D</b>
3.	<b>C</b>
4.	<b>A</b>
5.	<b>B</b>
6.	<b>F</b>



### 3.05 Define Phase – Communications Plan

#### 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

Stakeholders:	Interest areas-----→	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. <b>Project Board</b>		X	X	X	X	X										X
2. Project Managers			X				X						X	X	X	X
3. HR									X						X	X
4. Print Supplier												X				X
5. External Training Company							X	X	X	X	X	X	X		X	X
6. Projects Office staff							X						X	X	X	X
7. IT Department staff		X				X		X		X		X	X	X	X	X
8. Local Press		X														X
9. Staff union representative		X							X				X		X	X
10. Industry Regulators		X				X	X		X		X	X				X



**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:**

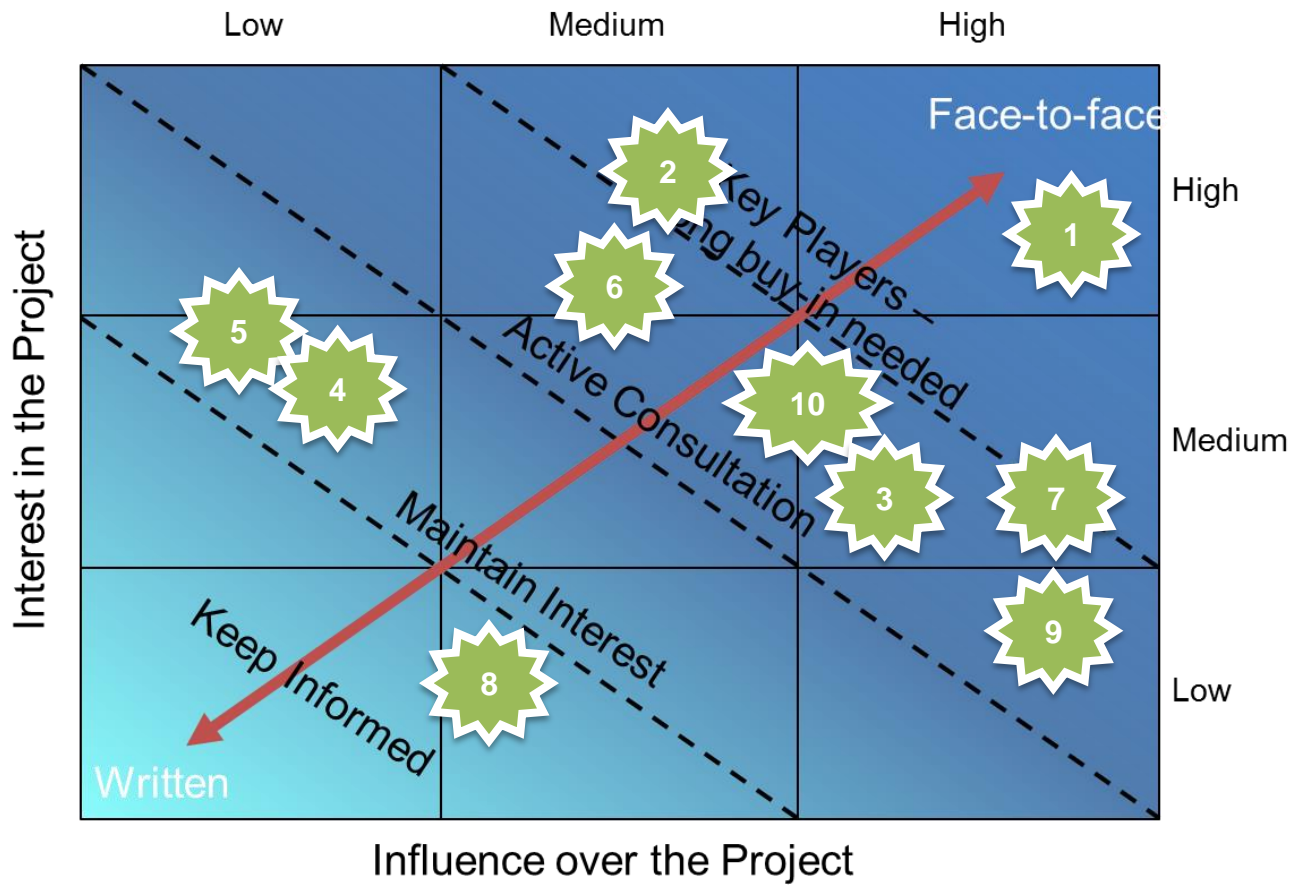
- National Media
- Local press
- Financial Analysts
- Union representatives
- Recruitment firms
- Competitors





## Stakeholder Analysis

Plot stakeholders (1-10) onto grid



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

<p><b>1. Project Board</b> <b>Key Messages: Regular progress information, not only about time, but cost, quality, issues and risks compared to the aggressive six month timeline.</b></p>
<p><b>2. Project Managers</b> <b>Key Messages: How their jobs will change as a result of the project. New terms and conditions, new requirements, new IT and reporting interfaces, training courses to attend, and the launch date.</b></p>
<p><b>3. HR</b> <b>Key Messages: launch date and how jobs will be changed, new terms and conditions and timings working back from launch date.</b></p>
<p><b>4. Print Supplier</b> <b>Key Messages: launch date and expected volumes of new reports and types of reports and compatibility and support required after launch date.</b></p>
<p><b>5. External Training Company</b> <b>Key Messages: new user and IT requirements and all changes to incorporate into new training courses, launch date and training timings working backward from launch date.</b></p>
<p><b>6. Projects Office staff</b> <b>Key Messages: new changes and effects on current and future workloads, new user, IT and reporting requirements and changes, and launch date. Number of projects converted and how support will be offered during transition period with some projects not converted and others are.</b></p>
<p><b>7. IT Department staff</b> <b>Key Messages: user and IT requirements, testing and implementing timings working backward from training timings.</b></p>
<p><b>8. Local Press</b> <b>Key Messages: new, improved and innovative project services being offered by local company. Job opportunities and local business growth. Launch date.</b></p>
<p><b>9. Staff union representative</b> <b>Key Messages: confirmation of changes and effects of changes on working conditions and staff terms and conditions. Launch date. Assurances of adequate and timely staff training provided.</b></p>
<p><b>10. Industry Regulators</b> <b>Key Messages: Assurances of changes against regulatory requirements, security data protection legislation. Launch date and audit and quality check results.</b></p>



### 3.06 Define Phase – Project Plan

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. I have written a travel book

2. I have travelled across South America

3. I have run a 10K race

4. I have raised £200 for charity

5. I have completed all of my work projects on time, to budget and to quality

6. I have asked for and received a 10% raise at work

7. I have attended 100% of my children's' school plays, recitals and sporting events

8. I have painted the house

9. I have remembered and celebrated my wedding anniversary

10. I have lost 10 lbs.



## **I have remembered and celebrated my wedding anniversary**

### **Brainstorm:**

1. Look through wedding album, find date (if not found, casually ask partner about the date)
2. Add date to calendar physical
3. Add date to outlook
4. Add reminders to outlook – 3 months, 2 months, 1 month, 2 weeks, 1 week, 1 day
5. Ask friends to put date in their calendars and remind me beforehand
6. Book nice restaurant 3 months prior
7. Listen to partner about what they want (as a gift) in casual conversations
8. Ask friends for gift ideas
9. Buy present
10. Wrap present
11. Have present wrapped
12. Buy card
13. Write something thoughtful in card
14. Dress up on the day
15. Get clothes dry cleaned
16. Polish shoes
17. Buy new outfit
18. Ask friends which outfit is best

### **Groups:**

**Enlist friends**

**Calendar (physical, online and reminders)**

**Gift**

**Dinner**



## AMAZING Project Management – Course Workbook

- 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
<b>Enlist friends</b>												
5												
8												
18												
<b>Calendar (physical, online and reminders)</b>												
1												
2												
3												
4												
<b>Gift</b>												
7												
9												
10												
11												
12												
13												
<b>Dinner</b>												
6												
14												
15												
16												
17												



### 3.07 Define Phase – Business Case

Business Case for Project: <u><a href="#">MyCo Client Party Project (CCP)</a></u>		
<p><b>Reasons</b> (The rationale for doing the project in the first place)</p>	<p>What is the problem to fix? Or</p> <p>What is the opportunity to take advantage of? Or</p> <p>Describe how there is an opportunity and problem?</p>	<p><b>The economy is down and MyCo business is slow.</b></p>
<p><b>Business Options</b> (This section demonstrates that all possible options have been considered and the recommended one is the best)</p>	<p>Do nothing to solve the problem and/or take advantage of the opportunity</p> <ul style="list-style-type: none"> <li>Is this the recommended option? If not, why not?</li> </ul> <p>Do the minimal to solve the problem and/or take advantage of the opportunity</p> <ul style="list-style-type: none"> <li>Is this the recommended option? If not, why not?</li> </ul> <p>Do something to solve the problem and/or take advantage of the opportunity</p> <ul style="list-style-type: none"> <li>Is this the recommended option? If not, why not?</li> </ul> <p>(There may be several 'Do something options' considered)</p> <ul style="list-style-type: none"> <li>Is this the recommended option? If not, why not?</li> </ul> <p>Which is the recommended option? (the rest of the Business Case will support the recommended option).</p>	<ul style="list-style-type: none"> <li><b>Continue with existing marketing campaign and website – Not effective, it is not working, not realistic to continue</b></li> <li><b>Send MyCo promotional materials to gain client awareness – Not effective as too many other competitors already do this, so will not have the desired impact.</b></li> <li><b>Host a business lunch meeting for clients and potential clients highlighting MyCo services. Too Risky – people may attend for free food without the intention of doing business.</b></li> <li><b>Host a MyCo party for clients and potential clients in order to connect MyCo with a fun and positive brand image in clients' minds and lead to more business (<u>RECOMMENDED</u>).</b></li> </ul>



<p><b>Expected Benefits</b> (MEASURABLE improvements resulting from doing the project. If they are not measurable they are not included in the justification for doing the project.)</p>	<p>Measurable Improvement – what is the starting point or ‘as is’ measurement, what is the expected improvement, when is it expected?</p> <ul style="list-style-type: none"> <li>There could be several benefits – each will need to be listed and explained</li> </ul>	<p>Current measurement: <b>0 new clients</b></p> <p>Measurable improvement expected: <b>5 new clients to sign contract for business.</b></p> <p>By when: <b>1 year</b></p>
		<p>Current measurement: <b>20% repeat business from existing clients</b></p> <p>Measurable improvement expected: <b>15% increase in repeat business from existing clients.</b></p> <p>By when: <b>1 – 3 years</b></p>
		<p>Current measurement: <b>£100,000 revenue p.a.</b></p> <p>Measurable improvement expected: <b>£30k increase in revenues</b></p> <p>By when: <b>1 year</b></p>
<p><b>Timescales</b> (Both the project timescales and the benefits timescales)</p>	<p>How long will the project take?</p>	<p><b>2 months to plan and host a party.</b></p>
	<p>How long will benefits be measured as a result of this project?</p>	<p><b>12 months to monitor and review increase in business, number of clients and revenues.</b></p>



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<b>Costs</b> (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)?	<b>£10k to host a party.</b>  <b>£3k to cover follow-up calls generated by increased interest from new and existing clients. To be self-funded from increase in new business.</b>
<b>Major Risks</b> (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?	<b>What if all the good party venues are fully booked?</b>  <b>What if no one comes to the party?</b>
	What are the major potential opportunities that may arise during the project?	<b>What if a client wants to partner with me on a new project?</b>





### 3.08 Define Phase – Risks

**Project Risk:** After her initial review, Jenny from 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)	1
Risk author	The person who raised the Risk	Jenny from IT
Date registered	The date the Risk was identified	<today's date>
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)	Because of the poor condition of the old system, the data migration not work properly causing the new system to be without (or with bad) historical data.
Probability	How likely the Risk is to occur (High, Medium, Low)	HIGH
Impact	The impact on the project if the Risk did occur in measurable terms (High, Medium, Low)	HIGH
Value	Probability x Impact	HIGH x HIGH
Proximity	How soon in time is the risk likely to occur? (imminent / at any time, within the stage, within the project)	At data migration step within the stage
Responses Considered	<u>Threats</u> <ul style="list-style-type: none"> <li>• Avoid</li> <li>• Reduce</li> <li>• Contingency</li> <li>• Transfer</li> <li>• Share</li> <li>• Accept</li> </ul> <u>Opportunities</u> <ul style="list-style-type: none"> <li>• Exploit</li> <li>• Enhance</li> <li>• Contingency</li> <li>• Transfer</li> <li>• Share</li> <li>• Accept</li> </ul>	<b>AVOID</b> <b>REDUCE</b> <b>CONTINGENCY</b>



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Responses Chosen	Chosen actions to resolve the risk. There may be more than one action per Risk.	<p><b>REDUCE: Proactively go back and improve the data quality in the old system before having to migrate it to the new system</b></p> <p><b>CONTINGENCY: If the data migration does not go well, hire in temp staff to manually enter historical data from old system into new system.</b></p>
Residual Risk	Estimated size of the Risk after the chosen actions will be implemented. Only Avoid eliminates the Risk. All others only treat it.	<b>LOW x LOW</b>
Risk Status	Active Or Closed	<b>Active</b>
Risk Owner	The person responsible for managing the Risk	<b>IT Director</b>
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.	<b>Jenny from IT</b>
Cross references to plans and associated risks	In which plan(s) are the Chosen responses allocated in?	<b>Stage plan for data migration step</b>
	Is this Risk linked to any other Risk?	<b>2, 7, 9</b>



## 4.01 Plan Phase – Overview (formal)

<b>OFFICE MOVE</b>		
<b>Project Activities</b>	<b>Quality Activities</b>	<b>Resource estimate(s) for Quality Activities</b>
<b>1. Requirements definition</b>		
Perform analysis of potential locations (best in terms of customers, employees, taxes, insurance, etc.)	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>Formal review of the analysis (especially any financial information provided)</li> <li>Check of the process used to perform the analysis to make sure it was suitable</li> </ul>	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>Financial expertise – 1-2 days</li> <li>Process expertise – several hours</li> </ul>
Define physical structure requirements	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>Architectural review of requirements</li> </ul>	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>Architecture expertise – 2 days</li> </ul>
Define staffing plan	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>HR review of plan</li> </ul>	<b>EXAMPLE:</b> <ul style="list-style-type: none"> <li>HR and staffing expertise – 2-5 days</li> </ul>
<b>2. Site selection</b>		
Negotiate contract or lease for new facility	<b>Legal review of contract</b> <b>Terms and conditions scrutiny</b> <b>check by facilities</b>	<b>Legal expertise 2 days</b> <b>Facilities expertise 1 day</b>
Sign contract or lease for new facility	<b>Legal check for legal signatures (authority of both parties to sign a contract)</b>	<b>Legal expertise 1 day</b>
Notify existing site	<b>Review of communications plan, types of messages, timings of messages, channels, etc.</b>	<b>Communications expertise 2 days</b>
<b>3. Office design</b>		
Document office design requirements <b>Interior</b> (Computer room, Product lab, Offices, Boardroom Meeting Rooms, Cubicles, Reception, Open areas, Employee areas, WCs) <b>Exterior</b> (Entry way, Car Park)	<b>Review of building standards adherence</b> <b>Check of dimensions</b> <b>User acceptance testing</b> <b>Fire regulation checks</b> <b>Health and safety checks</b> <b>Disability access</b>	<b>Interior design expertise 2 days</b> <b>Exterior design expertise 2 days</b>



	<b>checks</b>	
Document interior design requirements (Lighting, Flooring, Walls / partitions, Furnishings, Fittings)	<b>Check numbers against design requirements</b> <b>Health and safety check</b>	<b>Interior design expertise</b> <b>1 day</b>
<b>4. Construction build out</b>		
Obtain planning permissions	<b>2-3 review of application before being submitted (legal, facilities, architecture)</b>	<b>Legal expertise</b> <b>Facilities expertise</b> <b>Architecture expertise</b>
Bid process – vendor selection	<b>Review of bid process adherence</b> <b>Review of selection process</b>	<b>Legal expertise</b> <b>Contracts and procurement expertise</b> <b>2 days</b>
Bid process – sign vendor contracts	<b>Legal check for legal signatures (authority of both parties to sign a contract)</b>	<b>Contracts and procurement expertise</b> <b>1 day</b>
Construct exterior	<b>Planned and ad-hoc building regulation checks, minimum once per week</b>	<b>Construction expertise</b> <b>4 months ongoing</b>
Construct interior	<b>Planned and ad-hoc building regulation checks, minimum once per week</b> <b>Health and safety checks</b> <b>Usability checks</b> <b>Snag list walkthrough towards end</b>	<b>Construction expertise</b> <b>2-3 weeks ongoing</b>
Management activities to keep control over the plan (Including reports, meetings, decision points, etc.)	Frequency and timings	
<b>Progress Reports</b>	<b>Monthly</b>	
<b>Incident reports</b>	<b>As and when</b>	
<b>Legal briefings</b>	<b>Weekly</b>	
<b>Facilities briefings</b>	<b>Weekly</b>	
<b>Supplier briefings</b>	<b>Weekly</b>	



## 4.01 Plan Phase – Overview (informal)

Name of process / task: <b>Going for lunch</b>	
Input required to perform task: <b>£5 for sandwich and drink</b> <b>Walking shoes</b> <b>umbrella</b>	
<b>No.</b>	<b>Activities</b>
1.	<b>Change shoes and carry umbrella and purse</b>
2.	<b>Walk to deli across the street</b>
3.	<b>Choose sandwich and drink</b>
4.	<b>Pay for sandwich and drink</b>
5.	<b>Return to office</b>
Output from performing task:  <b>Lunch in a bag ready to eat at my desk</b>	

Risks Identified:
<b>1. Crossing the street, twice</b>
<b>2. Sandwich being mislabelled</b>
<b>3. Rain</b>



## 4.02 Plan Phase – Steps to planning

### 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: **Write your name with non-dominant hand**

<b>Single-point estimating</b>	<b>Three-point estimating</b>	<b>Comparative estimating</b>
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.
<b>10 seconds</b>	<b>2 +4 (10)+ 15 / 6 9.5</b>	<b>No one in my office had previous timed themselves doing this...</b>

Parametric estimating – using empirical data or industry standards. Are there any for this task? **None**

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

**In my opinion, comparative is the best because it's based on previous evidence of how long something could take. Followed by three-point since that involves multiple view points.**



## 5 Do Phase

Activity being delegated:	<b>Rearrange three chairs in the room</b>
Total time to do the activity:	<b>2 minutes</b>
Start Time:	<b>3pm</b>
End Time:	<b>3:02pm</b>
Quality levels expected - <ul style="list-style-type: none"> <li>Description of quality levels expected from the work in <b>measurable</b> terms</li> </ul>	<b>Chairs should be in a row and each chair has to be moved in the exercise – don't just move two chairs around a third to create a row.</b>
Quality checks during the work - <ul style="list-style-type: none"> <li>Description of how quality levels will be checked <b>during</b> the work</li> </ul>	<b>At the 1 minute mark, I will visually inspect your work from my seat</b>
Quality checks after the work - <ul style="list-style-type: none"> <li>Description of how quality levels will be checked <b>after</b> the work</li> </ul>	<b>At the end of the task, I will get up and walk around and visually inspect your work</b>
Progress reporting requirements – <ul style="list-style-type: none"> <li><b>how</b> will progress be reported during the work?</li> <li>And <b>how often</b> will progress need to be reported during the work?</li> </ul>	<b>Every 30 seconds, I want you to verbally tell me how you're doing I will let you know when each 30 seconds is up</b>
Issues and Problems – <ul style="list-style-type: none"> <li><b>how</b> will issues or problems be reported or escalated?</li> </ul>	<b>If you have a problem, I want you to stop what you're doing. Stand up straight. Wave your arms in the air and state loudly "issue report, issue report" repeatedly until I acknowledge you with eye contact. Then you can verbally explain the situation.</b>



## 6 Review Phase (formal)

What one piece of advice would you have appreciated before you took on your last project role?

**Customers, users, senior managers and even project team members change their minds! Don't take it personally.**

Logistically, how can you pass those words of wisdom on to another project manager about to do something similar?

**Raise the topic in PM forums and training courses that by not taking change personally, I've been better able to manage change control and therefore scope creep much better.**

What management activities or company structures (policies, procedures, cultural norms and behaviours) would help you disseminate and circulate this information to others?

**Training PMs, customers and senior managers in the art of capturing requirements so that there are a lot less changes during a project. More emphasis on scope definition in project documentation and more weight on getting agreements and signatures. So if management see this as a big decision, more time and energy will be put against it.**





## 6 Review Phase (informal)

Review Item	What went well?	What went badly?	What would you do differently next time?
Previous Job	Got promoted	Strained a relationship with a colleague	Spend the time and effort to get to the root of the problem and repair the relationship instead of superficially addressing it and never really getting past it.
Last meal out	Food and service were fantastic	Over ate	Only order appetizers or dessert. Not both
Last film seen	Got a good seat by getting there early	Film was boring	Check reviews first, even for 'block busters'
Last book read	Enjoyed the story	Stayed up late finishing it. Groggy the next day as a result.	Set a limit on how late I can read, even if close to finishing AND STICK TO THE LIMIT!



## 7 Close Phase

### 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	<ul style="list-style-type: none"> <li>o 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)</li> <li>o 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)</li> </ul>	<ul style="list-style-type: none"> <li>o Meet with new Business Owner</li> <li>o Physically hand over the physical copy</li> <li>o Either send link to the electronic copy (if stored in a document management system) or email electronic copies to the new Business Owner</li> <li>o Review all the files (training slides, delegate packs, trainer notes, etc.)</li> <li>o Review all the additional information (see previous column)</li> </ul>	<ul style="list-style-type: none"> <li>o The new computer system may not be in place long (as technology changes exponentially), so this would need to be updated or replaced (RISK)</li> <li>o 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)</li> </ul>



ID	Information to be handed over with the Deliverable	Steps to take to handover ownership	Open risks and issues associated with the Deliverable
3	<ul style="list-style-type: none"><li>• Deliverable description.</li><li>• Configuration Management information.</li><li>• Name and contact information of Supplier.</li><li>• Any Service Level Agreements attached with contract.</li></ul>	<ul style="list-style-type: none"><li>• Meet with new Business Owner</li><li>• Physically hand over the physical copy</li><li>• Either send link to the electronic copy (if stored in a document management system) or email electronic copies to the new Business Owner</li><li>• Review cancellation or exit-early clauses</li><li>• Review escalation of problem situations procedures</li><li>• Review expiration date (3 years time) and responsibilities to renew or find new supplier by expiration date</li><li>• Obtain signatures on records confirming handover process complete and ownership transfer complete.</li><li>• File records in Document management system</li></ul>	<ul style="list-style-type: none"><li>• Supplier might go out of business before the expiration date</li><li>• (RISK)</li><li>• Supplier was slow to respond to the project team questions. May continue to be unresponsive or slow to respond with Business Owner (RISK)</li><li>• Supplier was known to overcharge on some items. May continue to be inaccurate on future invoices (RISK)</li></ul>



5d	<ul style="list-style-type: none"><li>• Deliverable description. Configuration management information.</li><li>• Script from audio file.</li><li>• Contract with timings of ad being run on which radio channels.</li><li>• Contact information for talent who did the recording</li><li>• Contract held with talent for current and future ads</li><li>• Contact information for sound studio and special rates reserved for future work with this studio</li><li>• Processes to write a script, hire talent and book a studio.</li></ul>	<ul style="list-style-type: none"><li>• Meet with new Business Owner</li><li>• Physically hand over the physical copy</li><li>• Either send link to the electronic copy (if stored in a Company Marketing S Drive) or email electronic copies to the new Business Owner</li><li>• Review process of how to write a script, hire talent and book a studio if a second follow-up ad is to ever be produced after this one runs its course.</li><li>• Review copy holders – all radio channels running the ad have a copy.</li></ul>	<p>The ad may be so successful a follow up ad may be needed to keep the advertising and marketing momentum going (RISK – OPPORTUNITY)</p> <p>The audio file is easily corruptible. Ensure clean transfers when sharing (ISSUE)</p>
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## 8 Realise Benefits Phase

### 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
<b>EXAMPLE:</b> <b>Improved revenue.</b> By selling the new product line, Organisation X will increase revenue by 15% over the next three years.		
<ul style="list-style-type: none"> <li>○ Adjustments to the Sales Report to include the new product line will need be made</li> <li>○ Existing Revenues Report will show revenues for baseline measure</li> </ul>	<ul style="list-style-type: none"> <li>○ 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</li> <li>○ Revenues Report can be pulled on a monthly basis to monitor. Trajectory should go UP with the inclusion of new product line sales.</li> </ul>	<p>How to measure the benefit</p> <ul style="list-style-type: none"> <li>○ Compare year on year revenues using Revenues Report</li> </ul> <p>How long to measure the benefit for</p> <ul style="list-style-type: none"> <li>○ Pull / print Revenues Report for comparison for three years</li> </ul>



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
<p><b>BENEFIT: 3 <u>Policy or legal compliance.</u></b> By applying regulation 'IGGabc001' to all working practices, Company X will satisfy legal requirements from the International Governing Group of ABC.</p>		
<p>Set up internal audit team. Train on new legislation requirements and create audit processes and incident reports, specific for this legislation.</p> <p><u>Baseline:</u> Legislation is currently not in place. Baseline is 0.</p>	<p>Quality review of working practises against new legislation before implementation.</p> <p>Quality review of training courses for staff to use and adhere to new regulations.</p> <p>Monitor reports of progress first three months – number of incidents of non-compliance</p>	<p>Internal Audit of staff using the correct working practises against regulation.</p> <p>Audit of processes by regulatory body</p> <p>Annually, until further notice of regulation change.</p>
<p><b>BENEFIT: 8 <u>Enhanced HR Management.</u></b> By improving staff morale, Department X will increase productivity by 25% over two years.</p>		
<p>Use existing system time counter. Set up system to capture capacity – potential users on the system at one time.</p> <p><u>Baseline:</u> Current productivity KPIs: 60% up time 50% capacity</p>	<p>Daily reports of system up time</p> <p>Weekly statistics of potential versus actual users on the system at one time.</p>	<p>Quarterly reports of system up time and system usage.</p> <p>For two years.</p>