

Biz Performance Project Management (Biz-PM)

Project Management Overview



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Created: 12th August 2008
Version: 1.00

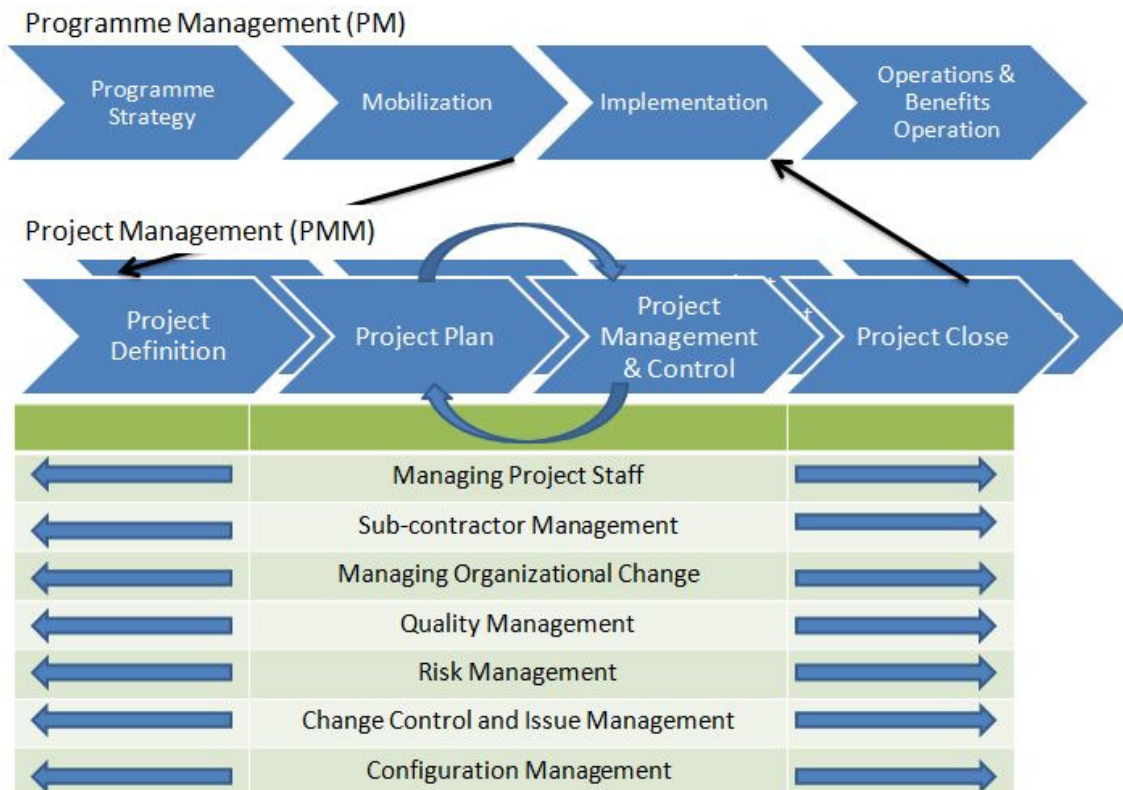


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Overview

Effective project management involves managing and delivering benefit-driven commercial projects to satisfy the expectations of stakeholders, while meeting time and cost targets and quality criteria. To achieve this consistently, the extensive experience of Biz Performances project management consultants is complemented by a proven methodology, representing the experience of our management team.



Biz-PM is Biz Performances project management methodology. It provides a comprehensive framework for the effective management and administration of all commercial projects, whether focused on people, process, technology or any combination of the three. It is based on many years experience, and is consistent with recognised industry standards for project management: the ISO 10006 - Guide to Project Management, and the Project Management Institutes - Guide to the Project Management Body of Knowledge (PMBOK).

Biz-PM is a generic, scalable methodology, supported by Biz Performances knowledge management systems, templates and toolsets, and integrates the areas of project management (*e.g.* planning and control, quality and risk management) with the people focused areas (*e.g.* managing project staff and subcontractor management). Biz-PM is designed to complement, and be used in conjunction

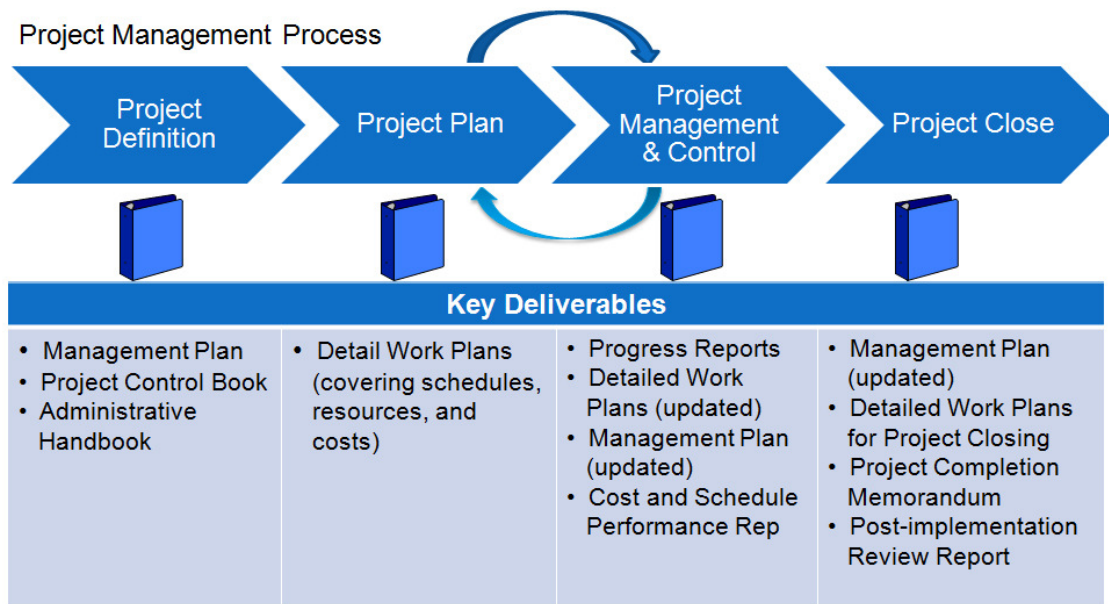
with, other lifecycle methodologies specific to the type of project and Biz-PM is also fully integrated with programme management methodology (PMM) see overleaf.

Biz-PM is easy to navigate, with the steps defined as phases, activities and tasks separated from the more detailed techniques. It also includes a set of sample project management deliverables.

There are four phases represent:

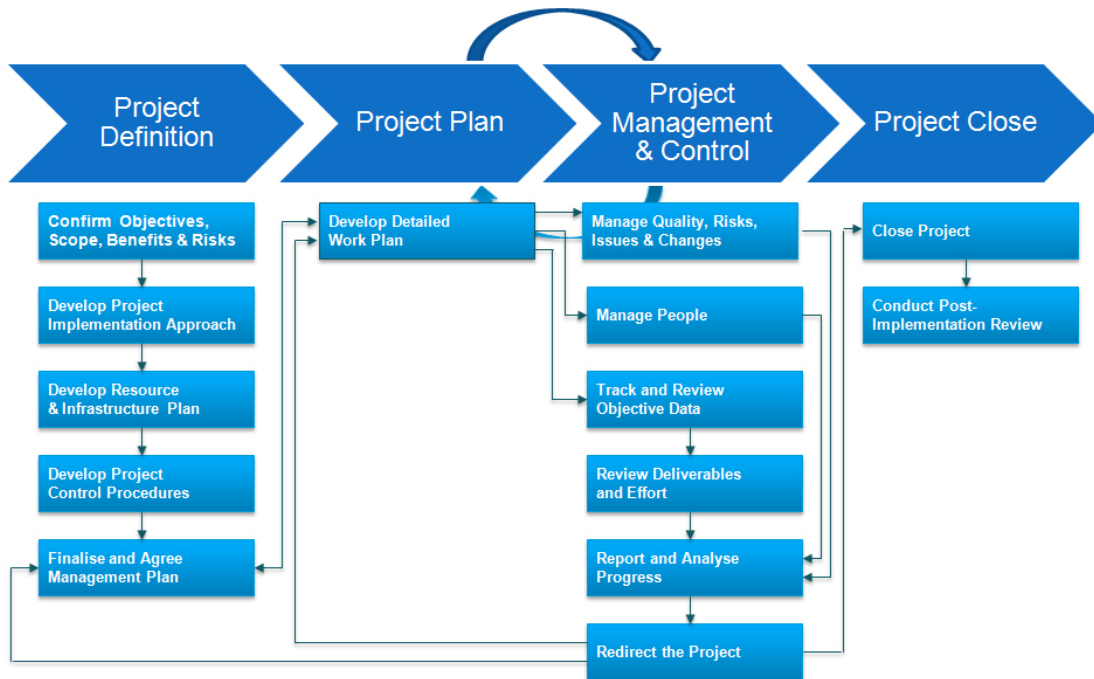
- **Phase 1:** project definition and initiation
- **Phases 2 and 3:** detailed work planning and control (undertaken . iteratively . for a limited time horizon only)
- **Phase 4:** project closure and post-implementation review

The key deliverables, by phase, are listed below:

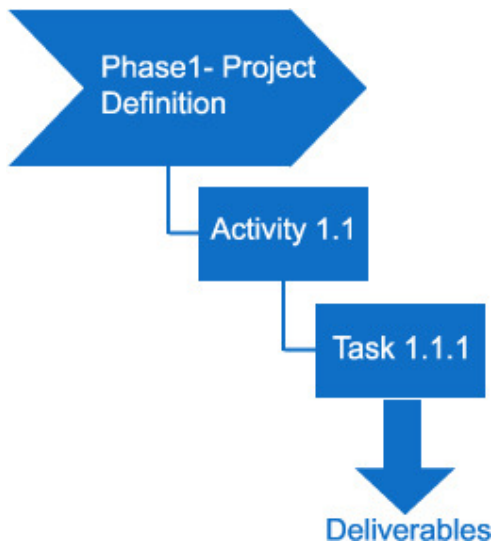


Biz PM: Activities and dependencies

The Four Phases are broken down into Activities and Tasks, which result in deliverables.



PHASE 1.0 - The project definition phase



Phase objective:

The vital deliverable that lays the foundation for every subsequent aspect of a project's management is the management plan. This is the key deliverable from the Project Definition phase, and ensures that there is a clear and common understanding of the objectives, scope and expected benefits at the outset. It provides high-level estimates, sets out the approach to managing the project and assuring quality, and prescribes the mechanisms for formal reporting and control.

The project manager/management planning team gathers information by reviewing existing documentation, interviewing the appropriate personnel, and conducting facilitated workshops. The end result of these activities is the development of a management plan that includes the following:

- objectives, scope, benefits, and risks
- project implementation approach
- high-level estimates
- resource and infrastructure plan (including project office setup)
- project control approach

The management plan should establish a clear understanding of the scope, approach, and resources required to successfully complete the project, and the approval of the management plan by the steering committee authorises commencement of detailed work planning for the first tranche. of work (the Project Plan Phase).

It should be an executive document. As such it should document the project control approach, but detailed project control procedures (e.g. for quality and risk management) should be documented in the project control book. The management plan is a living document that should be updated as change occurs throughout the life of the project.

Major Deliverables:

- Management plan
- Project control book
- Administrative hand

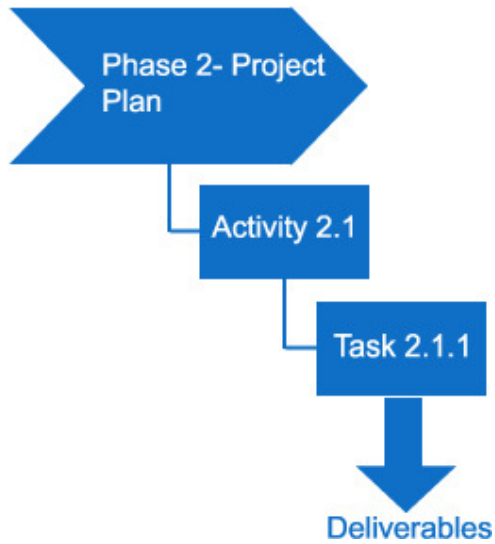
The Management Plan Framework



Work Breakdown Structure	
Activity 1.1	Confirm objectives, scope, benefits, and risks
Task 1.1.1	Assemble a management plan team
Task 1.1.2	Review existing documentation
Task 1.1.3	Conduct interviews and workshops
Task 1.1.4	Document and agree objectives, scope, benefits, and risks
Activity 1.2	Develop project implementation approach
Task 1.2.1	Select or develop a lifecycle methodology
Task 1.2.2	Develop delivery strategy
Task 1.2.3	Develop master project schedule
Task 1.2.4	Develop high-level estimates
Task 2.2.5	Finalise approach and obtain commitment
Activity 1.3	Develop resource and infrastructure plan
Task 1.3.1	Develop project organisation
Task 1.3.2	Define working environment
Task 1.3.3	Define subcontractor relationships
Task 1.3.4	Define approach to organisational change
Task 1.3.5	Develop project communications plan
Activity 1.4	Develop project control procedures
Task 1.4.1	Develop quality management Procedures
Task 1.4.2	Develop risk management procedures
Task 1.4.3	Develop issue management procedures
Task 1.4.4	Develop change control procedures
Task 1.4.5	Develop configuration management procedures
Task 1.4.6	Develop control and reporting procedures
Task 1.4.7	Develop detailed work planning methodology
Task 1.4.8	Develop administrative handbook
Activity 1.5	Finalise and agree management plan
Task 1.5.1	Document and agree management plan
Task 1.5.2	Communicate management plan



PHASE 2.0 - The project plan phase



Phase objective:

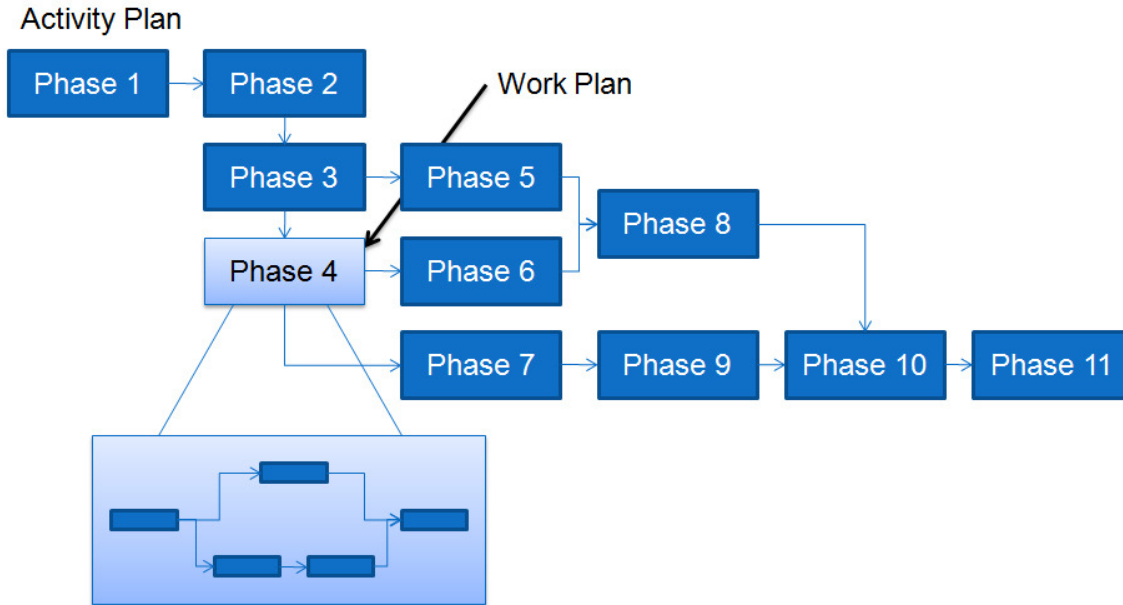
The objectives of this phase are to:

- Identify the work (tasks, dependencies, and deliverables); effort (hours); schedules (start and end dates); and resources (people, equipment, and funding) required to meet the specified objective
- Improve the opportunity for success by reducing risk
- Establish a baseline against which to measure progress
- Form the basis for communicating project objectives and assignments to project team members

Detailed work plans are:

- developed prior to commencement of phases
- undertaken for a specific period of time to accomplish a specific work scope
- reviewed and updated during the execution of detailed work plan tasks
- assessed at the conclusion of the effort to compare actual performance against plan

Phase Limited Planning



The management plan WBS identifies the phases and major activities to be performed within the project. Detailed work plans concentrate only on a subset of the management plan WBS at any point in time. This is known as phase limited planning. Detailed work planning should be performed for a visible time horizon only (typically 60 to 120 days). For example, as illustrated above, at the end of Phase 1 detailed work plans are produced for Phases 2, 3, and 4. Toward the end of these phases detailed work plans are produced for Phases 5, 6, and 7.

Phase limited planning has several advantages:

- Plans are kept simple, modular, manageable, and linked to the management plan WBS
- Effort is not wasted in developing detailed work plans for later phases, which may be subject to changes in scope, resourcing, or slippage from previous phases (hence making their baselines invalid)

The decision point at the end of the phase is supported by detailed work plans for immediately subsequent phases.

Major Deliverables:

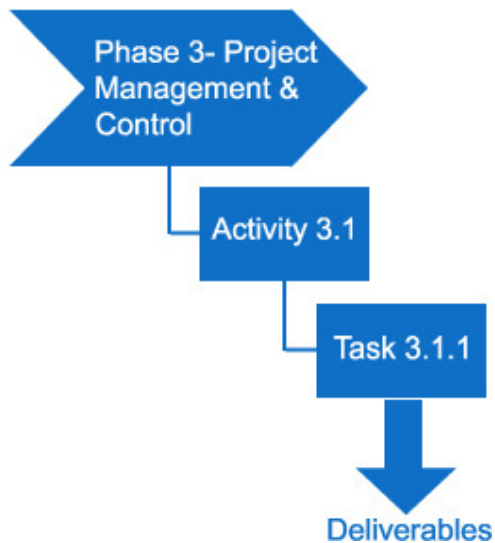
- Detailed work plans (covering schedules, resources, and costs).

Work Breakdown Structure

Activity 2.1	Develop detailed work plan
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Task 2.1.1	Document objectives, scope, and assumptions
Task 2.1.2	Expand WBS and develop deliverable descriptions
Task 2.1.3	Determine task dependencies
Task 2.1.4	Estimate effort for each task
Task 2.1.5	Identify support, overhead, and contingency
Task 2.1.6	Assign specific resources and costs
Task 2.1.7	Calculate the detailed schedule
Task 2.1.8	Formally agree and baseline work plan
Task 2.1.9	Undertake communication and training

PHASE 3.0 - The project management and control phase



Phase objective:

The methods, procedures, and guidelines used to plan, track, report, and control the project and its deliverables were defined in the Project Definition Phase. During the Project Management and Control Phase, these are implemented and used to manage the day-to-day activities of the project effectively. This includes monitoring/managing benefits and reporting progress toward their realisation.

Project management, control, and reporting involve:

- managing quality, risks, issues, and changes
- managing resources and infrastructure
- managing performance

- redirecting the project

Project management and control:

- is an iterative process that continually measures the current position and future direction of the project against an agreed plan
- is an iterative process that continually measures the current position and future direction of the project against an agreed plan is designed to ensure that the project objectives, defined in the management plan, are achieved
- provides the basis for formal project communication of planned and actual effort, trends, accomplishments, resource utilisation, issues, changes, and other pertinent indicators

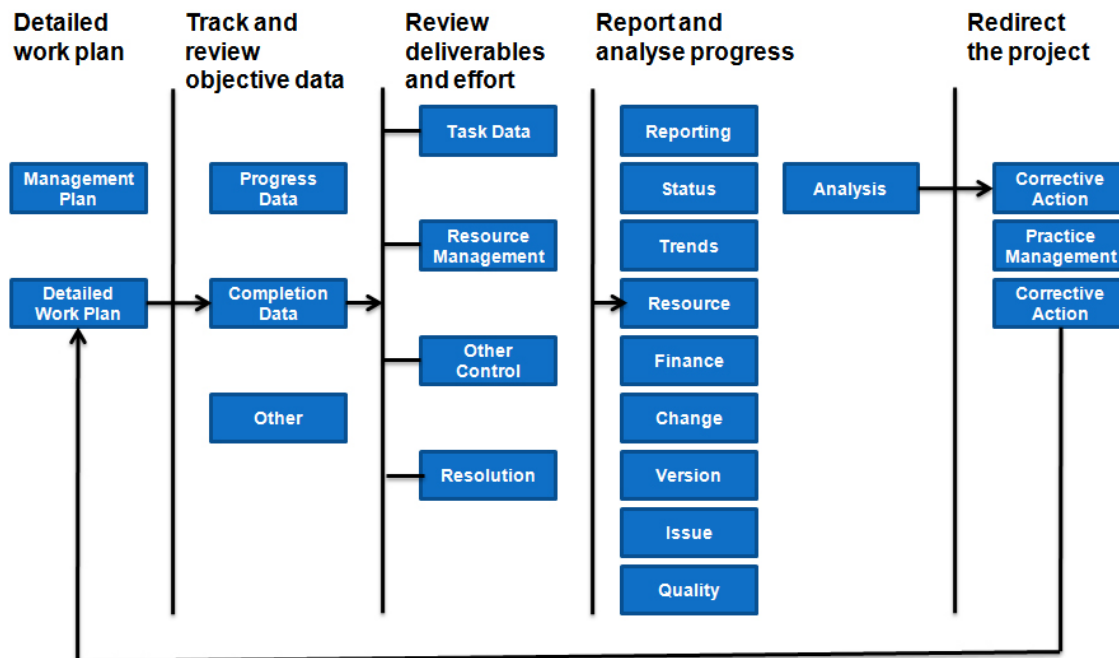
An effective project management, control, and reporting process increase the project manager's ability to:

- report objectively on the state of the project
- identify obstacles and formulate corrective actions
- understand the impact of existing obstacles on future work
- implement solutions
- make appropriate management decisions based on accurate information

Major Deliverables:

- Progress reports
- Detailed work plans (updated)
- Management plan (updated)
- Cost and schedule performance reports

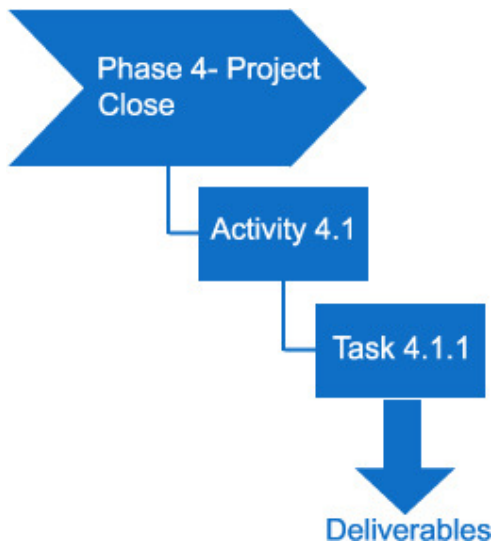
Project control and reporting steps



Work Breakdown Structure	
Activity 3.1	Manage quality, risks, issues, and changes
Task 3.1.1	Manage quality
Task 3.1.2	Manage risks
Task 3.1.3	Manage issues
Task 3.1.4	Manage change control
Task 3.1.5	Manage configuration
Activity 3.2	Manage people
Task 3.2.1	Manage project staff
Task 3.2.2	Manage subcontractors
Task 3.2.3	Manage organisational change
Task 3.2.4	Manage expectations
Activity 3.3	Track and review objective data
Task 3.3.1	Capture progress data

Task 3.3.2	Capture completion data
Activity 3.4	Review deliverables and effort
Task 3.4.1	Meet with team members
Task 3.4.2	Monitor progress informally
Activity 3.5	Report and analyse progress
Task 3.5.1	Produce reports
Task 3.5.2	Analyse information
Task 3.5.3	Conduct status meetings
Activity 3.6	Redirect the project
Task 3.6.1	Implement corrective actions
Task 3.6.2	Develop proactive strategies
Task 3.6.3	Maintain detailed work plan
Task 3.6.4	Maintain management plan

PHASE 4.0 - The project close phase



Phase objective:

The objectives of the Project Close Phase are:

- to transition the project to ongoing operations
- to disband the project organisation and environment in an organised manner after the project's objectives have been achieved and all detailed work plan tasks are completed
 - (at a later stage) to perform a post-implementation review and ensure that agreed actions arising from the review are completed

To complete a project effectively, the project manager must identify (and steering committee endorse):

- detailed completion criteria
- tasks to be completed before the project structure is dismantled
- the organisation or individuals responsible for providing ongoing support for the final deliverables

The project manager must ensure that the sponsor and steering committee understand and support the project closing process to reduce final project implementation risks. A formal project closing process helps avoid the risk that:

- project "loose ends" are not tied up or ongoing tasks handed over effectively to the support organisation
- the project drifts on in an attempt to achieve perfection

The tasks defined in this phase are generally applicable to all projects. In addition, the 'lifecycle' methodology may reference specific "post-implementation" tasks to be addressed by the project team.

The high-level completion criteria and closing plan should be part of the project's management plan. A detailed work plan should be developed for project closing activities and tasks.

The post-implementation review has two objectives:

- to determine the extent to which the benefits anticipated from the project have been realised, and identify areas of further potential benefit

- to review the strengths and weaknesses of the project's performance to improve methods for the future

Post-implementation reviews are probably the most neglected part of the project lifecycle. Having assessed project performance and the immediate lessons learned while closing the project, this activity needs to take place at least six months after the implementation and should look at the benefits realised in a wider context. It should be positive and forward looking.

Major Deliverables:

- Management plan (updated)
- Detailed work plans for project closing activities and tasks
- Project completion memorandum
- Post-implementation review report

Work Breakdown Structure	
Activity 4.1	Close project
Task 4.1.1	Review and update the management plan
Task 4.1.2	Develop detailed work plan for closing
Task 4.1.3	Perform transition to operations
Task 4.1.4	Close contracts with subcontractors
Task 4.1.5	Assess project performance and document lessons learned
Task 4.1.6	Conduct final performance reviews
Task 4.1.7	Document and archive project deliverables
Task 4.1.8	Dispose of project infrastructure
Task 4.1.9	Disband project organisation
Task 4.1.10	Formally close project
Activity 4.2	Conduct post-implementation review
Task 4.2.1	Plan post-implementation review
Task 4.2.2	Conduct post-implementation review
Task 4.2.3	Perform agreed actions