

Project Quality Management

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Project Quality Management

Lecture 7

PMG354

Initiating the project

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Lecture

07

Objectives

At the end of this lecture, we expect to acquire a knowledge about the project initiation phase and all related activities that have been carried out in order to be able to plan for the project.

Lecture
07

Contents

- Project Management Knowledge Areas
- The Project Documents
- Project Initiation
- The Statement of Work (SOW)
- The Project Charter
- Project Scope Statement
- Project Assumptions
- Identify Stakeholders
- The Project Team
- Summary and conclusion

Project Management Knowledge Areas

No.	Knowledge Area	Definition
1	Project Integration Management	includes the processes and activities to identify, define, combine, unify, and coordinate the various processes and project management activities within the Project Management Process Groups.
2	Project Scope Management	includes the processes required to ensure that the project includes all the work required, and only the work required, to complete the project successfully
3	Project Schedule Management	includes the processes required to manage the timely completion of the project.

Project Management Knowledge Areas

No.	Knowledge Area	Definition
4	Project Cost Management	includes the processes involved in planning, estimating, budgeting, financing, funding, managing, and controlling costs so the project can be completed within the approved budget.
5	Project Quality Management	includes the processes for incorporating the organization's quality policy regarding planning, managing, and controlling project and product quality requirements, in order to meet stakeholders' expectations.
6	Project Resource Management	includes the processes to identify, acquire, and manage the resources needed for the successful completion of the project

Project Management Knowledge Areas

No.	Knowledge Area	Definition
7	Project Communications Management	includes the processes required to ensure timely and appropriate planning, collection, creation, distribution, storage, retrieval, management, control, monitoring, and ultimate disposition of project information.
8	Project Risk Management	includes the processes of conducting risk management planning, identification, analysis, response planning, response implementation, and monitoring risk on a project.
9	Project Procurement Management	includes the processes necessary to purchase or acquire products, services, or results needed from outside the project team.

Project Management Knowledge Areas

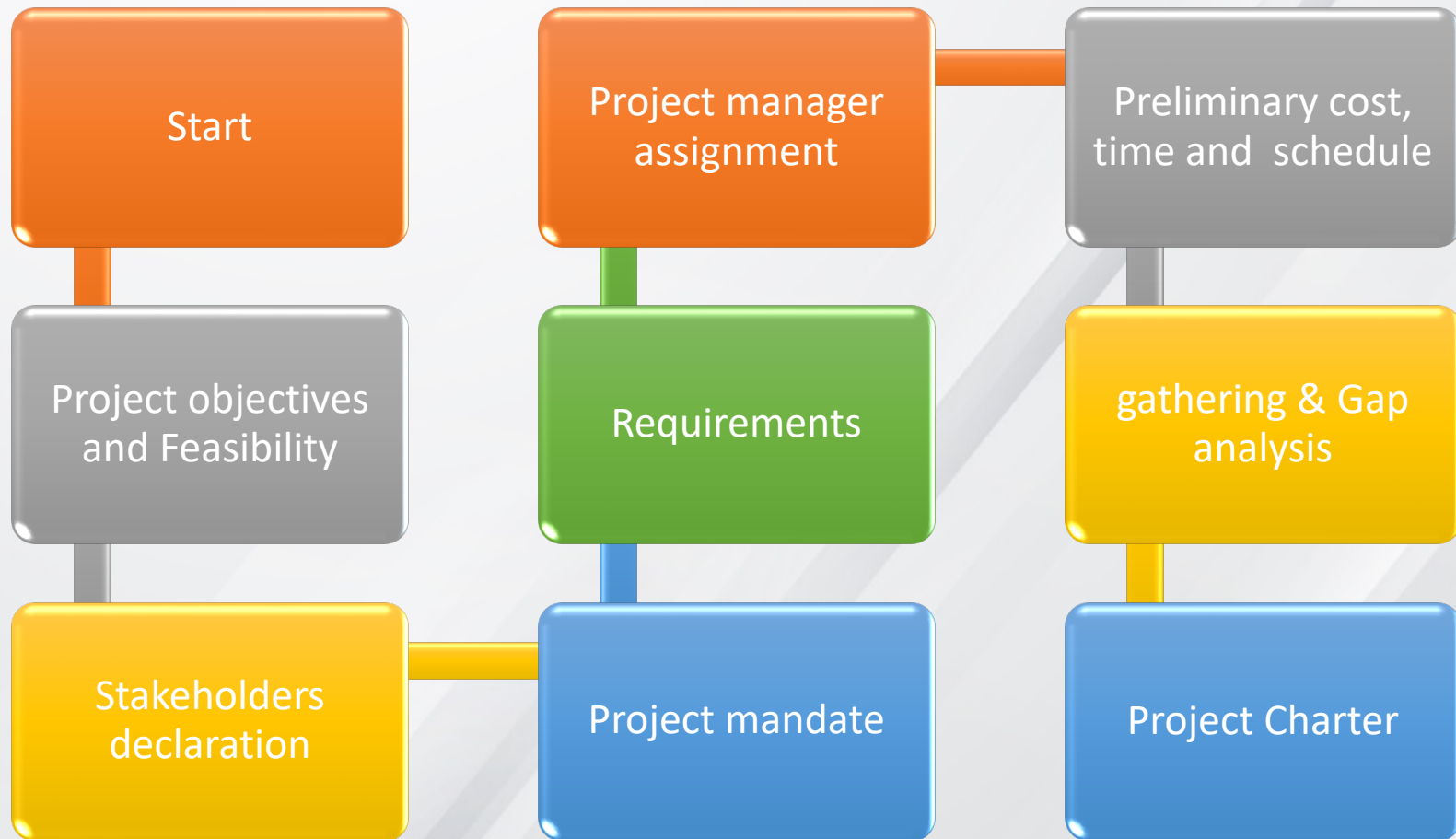
No.	Knowledge Area	Definition
10	Project Stakeholder Management	includes the processes required to identify the people, groups, or organizations that could impact or be impacted by the project, to analyze stakeholder expectations and their impact on the project, and to develop appropriate management strategies for effectively engaging stakeholders in project decisions and execution.

Knowledge Areas	Project Management Process Groups				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring and Controlling Process Group	Closing Process Group
4. Project Integration Management	4.1 Develop Project Charter	4.2 Develop Project Management Plan	4.3 Direct and Manage Project Work 4.4 Manage Project Knowledge	4.5 Monitor and Control Project Work 4.6 Perform Integrated Change Control	4.7 Close Project or Phase
5. Project Scope Management		5.1 Plan Scope Management 5.2 Collect Requirements 5.3 Define Scope 5.4 Create WBS		5.5 Validate Scope 5.6 Control Scope	
6. Project Schedule Management		6.1 Plan Schedule Management 6.2 Define Activities 6.3 Sequence Activities 6.4 Estimate Activity Durations 6.5 Develop Schedule		6.6 Control Schedule	
7. Project Cost Management		7.1 Plan Cost Management 7.2 Estimate Costs 7.3 Determine Budget		7.4 Control Costs	
8. Project Quality Management		8.1 Plan Quality Management	8.2 Manage Quality	8.3 Control Quality	

Knowledge Areas	Project Management Process Groups				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring and Controlling Process Group	Closing Process Group
9. Project Resource Management		9.1 Plan Resource Management 9.2 Estimate Activity Resources	9.3 Acquire Resources 9.4 Develop Team 9.5 Manage Team	9.6 Control Resources	
10. Project Communications Management		10.1 Plan Communications Management	10.2 Manage Communications	10.3 Monitor Communications	
11. Project Risk Management		11.1 Plan Risk Management 11.2 Identify Risks 11.3 Perform Qualitative Risk Analysis 11.4 Perform Quantitative Risk Analysis 11.5 Plan Risk Responses	11.6 Implement Risk Responses	11.7 Monitor Risks	
12. Project Procurement Management		12.1 Plan Procurement Management	12.2 Conduct Procurements	12.3 Control Procurements	
13. Project Stakeholder Management	13.1 Identify Stakeholders	13.2 Plan Stakeholder Engagement	13.3 Manage Stakeholder Engagement	13.4 Monitor Stakeholder Engagement	

Project Management Plan	Project Documents	
1. Scope management plan	1. Activity attributes	19. Quality control measurements
2. Requirements management plan	2. Activity list	20. Quality metrics
3. Schedule management plan	3. Assumption log	21. Quality report
4. Cost management plan	4. Basis of estimates	22. Requirements documentation
5. Quality management plan	5. Change log	23. Requirements traceability matrix
6. Resource management plan	6. Cost estimates	24. Resource breakdown structure
7. Communications management plan	7. Cost forecasts	25. Resource calendars
8. Risk management plan	8. Duration estimates	26. Resource requirements
9. Procurement management plan	9. Issue log	27. Risk register
10. Stakeholder engagement plan	10. Lessons learned register	28. Risk report
11. Change management plan	11. Milestone list	29. Schedule data
12. Configuration management plan	12. Physical resource assignments	30. Schedule forecasts
13. Scope baseline	13. Project calendars	31. Stakeholder register
14. Schedule baseline	14. Project communications	32. Team charter
15. Cost baseline	15. Project schedule	33. Test and evaluation documents
16. Performance measurement baseline	16. Project schedule network diagram	
17. Project life cycle description	17. Project scope statement	
18. Development approach	18. Project team assignments	

Project Initiation



✧ Initiating a project:

✧ 1) Develop Project Charter

2) Identify Stakeholders

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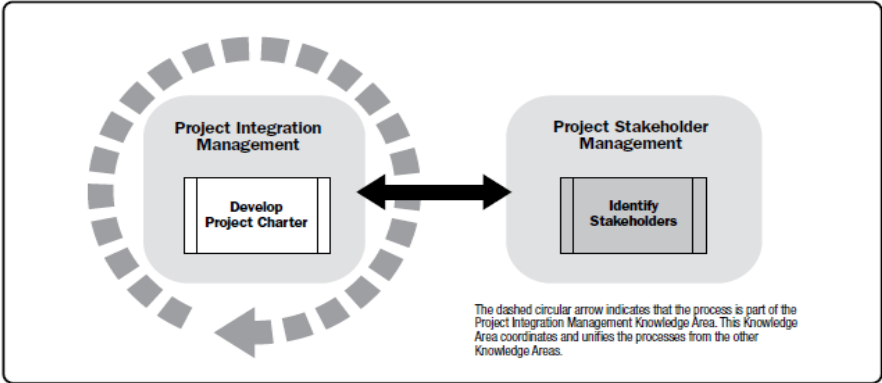
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processes at the start of each phase helps keep the project focused on the business need that the project was undertaken to address. The project charter, business documents, and success criteria are verified. The influence, drivers, expectations, and objectives of the project stakeholders are reviewed.

Involving the sponsors, customers, and other stakeholders during **initiation** creates a shared understanding of success criteria. It also increases the likelihood of deliverable acceptance when the project is complete, and stakeholder satisfaction throughout the project.

The Initiating Process Group includes the project management processes identified in Sections 2.1 through 2.2.



The diagram illustrates the Initiating Process Group. It features two main components: 'Project Integration Management' and 'Project Stakeholder Management'. 'Project Integration Management' contains the 'Develop Project Charter' process, which is enclosed in a dashed circular arrow indicating it is part of the Project Integration Management Knowledge Area. 'Project Stakeholder Management' contains the 'Identify Stakeholders' process. A double-headed arrow connects the 'Develop Project Charter' process to the 'Identify Stakeholders' process, signifying their interrelationship. A note at the bottom right explains that the dashed circular arrow indicates the process is part of the Project Integration Management Knowledge Area, which coordinates and unifies the processes from other Knowledge Areas.

Find
Initiation
Previous Next

Figure 2-2. Initiating Process Group

The Initiation Phase

- Before you begin the planning process, you need to clearly identify the project and the work involved.
- Clearly stating the work involved in a project helps the stakeholders to understand what needs to be accomplished to meet the project's objectives; and with a clear scope statement, you will enable all participants and stakeholders to focus on the true goals of the project.

The Statement of Work (SOW)

- The Statement of Work (SOW) (issued by the customer) describes the work that will be performed in the project.
- It includes mainly the project definition elements and may include other elements:
 - Milestone lists and delivery schedules
 - Specifications for each deliverable and milestone
 - Narrative descriptions of each project task
 - Assumptions or constraints

The Project Charter

- The Project Charter is an official document that the project is backed by – and funded by – the organization; usually, the Project Charter is signed and published by the project's sponsor.
- The Project Charter may be a short memo or a multi-page document, but should contain:
 - Project name and description.
 - Project Goals and Objectives.
 - Name of the project manager.
 - Authorization for using organizational resources.

Develop Project Charter

Develop Project Charter

Inputs

- .1 Business documents
 - Business case
 - Benefits management plan
- .2 Agreements
- .3 Enterprise environmental factors
- .4 Organizational process assets

Tools & Techniques

- .1 Expert judgment
- .2 Data gathering
 - Brainstorming
 - Focus groups
 - Interviews
- .3 Interpersonal and team skills
 - Conflict management
 - Facilitation
 - Meeting management
- .4 Meetings

Outputs

- .1 Project charter
- .2 Assumption log

Develop Project Charter Output

- The Project Charter : is an output from the develop project charter process.
 - It is a document that makes the project official and includes : Project purpose, project objectives
 - High level project requirements
 - Authorization for a project manager
 - An initial set of schedule milestones(High level)
 - Summary budget of the project

Develop Project Charter

Project Charter Template

A. General Project Information

<i>Project Title:</i>			
<i>Brief Project Description:</i>			
<i>Sponsor:</i>			
<i>Date:</i>		<i>Version:</i>	

B. Project Objective:

Explain the measurable objectives and success criteria of the project.

C. Assumptions

List and describe the high level requirements and known assumptions and constraints.

D. Project Scope

Describe the scope of the project. The project scope establishes the boundaries of the project.

E. Project Milestones

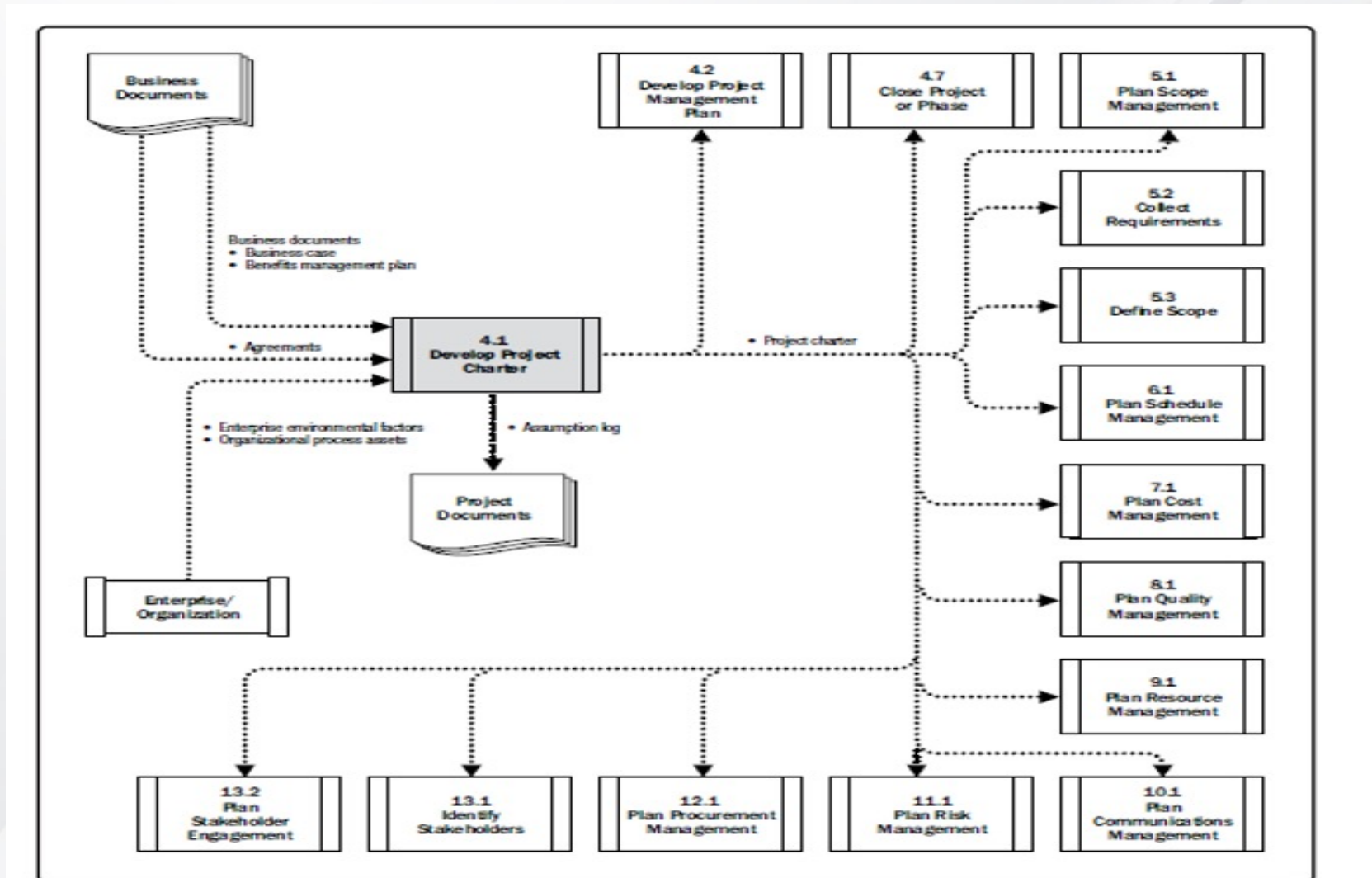
List the major milestones and deliverables of the project.

Milestones	Deliverables	Date

Develop Project Charter Output

- Assumption Log:-
 - High Level Strategic and operational assumptions and constraints are normally identified in the business case before the project is initiated and will flow into the project charter
 - Lower Level activity and task assumptions are generated throughout the project such as defining technical specifications, estimates, the schedule, risks, etc.
 - The assumption log is used to record all assumptions and constraints throughout the project life cycle.

Develop Project Charter-Data Flow Diagram



Guidelines to Develop a Project Charter

- Use a corporate template.
- Include the project and authority identification information.
- Include a clear, concise description of the business need, opportunity, or threat that the project is intended to address.
- Consider any legal requirements associated with the project.
- Include summary descriptions of the product or service of the project.
- Include a description of the project's relationship to the business need it is intended to address.
- Consider any known constraints and/or assumptions.
- Ensure the person with the required knowledge and authority signs the project charter.
- Distribute the signed project charter to the appropriate project stakeholders.

Project Scope Statement

- **A Project Scope Statement:** explains what is included – and what is not included – in your project.
- Document any assumptions or constraints that may limit what your project can accomplish.
- Use your Project Scope statement to avoid Scope Creep (Additional tasks that are added to the project and that make it difficult to achieve project goals).

Scope Statement (Cont.)

SCOPE STATEMENT			
Version	Primary Author(s)	Description of Version	Date of Version
Draft 1	PM Name	Initial draft	06/11/08
Approved	PM Name	Revised from stakeholders' review	06/30/08

I. Project Name
Research Project for OGC Office Productsk

II. Authorities
A. Project Sponsor
Susan Williams
B. Project Manager
Carolyn

III. Description of Product/Service Characteristics:

- The report will contain all the deliverables listed below under Part-A of 'Project Deliverables and Exclusion' section
- The report will be easily readable and will be delivered in both spreadsheet & PDF formats

IV. Project Deliverables and Exclusions
A. The Research Project team will produce the following deliverables:

- Recommendation on the most cost-effective route to transport finished goods from China to US
- Complete detail on the route including modes and cost
- List of challenges, risks & constraints in the given route
- Test case report covering all parameters
- List of potential logistics companies that the client could partner with, for the purpose of cost-effectively transporting the finished goods from China to US
- Research workings/calculations will be provided as appendix to the main report

Project Outcome

V. Project Objective(s)

- Identify and recommend the most cost-effective route to transport finished goods from China to US
- Should include complete coverage of all the parameters including modes and cost along with the detailed research workings/calculations
- Project should be delivered by 09/30/2009 at a cost of \$150,000 to the client

VII. Supporting Detail
A. Constraints

- This project must be done by the end of September 2009 to enable the client to make further decisions
- Modes of transport limited to land and air

B. Assumptions

- Pay-per-use subscription and paid reports will cover the necessary data required for the research
- Resources with necessary skills & expertise will be available for the duration of the project

VIII. Approval

Original signature stored with project files
Susan Williams, Project Sponsor

07/30/2008
Date Signed

Project Exclusions

*Build refers to units manufactured for testing and quality assurance purposes.

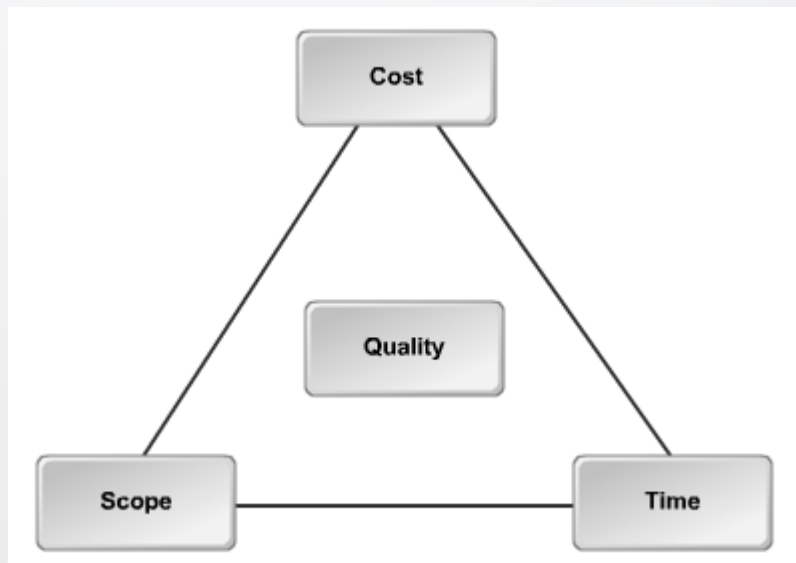
B. The Research Project team will NOT produce the following deliverables:

- Transport the finished goods
- Negotiate for cost reduction with potential logistics companies

Project Deliverables

Constraining Factors

- Are factors that limit the way a project can be approached.
- Scope, cost, and time are three major constraining factors in projects.



The constraints triangle

Project Assumptions

- **Project Assumptions:** are statements that must be taken to be true in order for the project planning to begin.
- As the project progresses, assumptions have to be reviewed and reworked to decide if they prove to be true (ex: project staff resources will be available as and when they are needed.)

Project Goals and Objectives

- Project goals and objectives are the target your project needs to be achieved.
- They should include enough details (and in general they should be SMART!):
 - Specific: Objectives should specify what they want to achieve
 - Measurable: in terms of time, cost, and quality. .
 - Achievable: Are the objectives you set achievable and attainable?
 - Realistic: Can you achieve the objectives with the resources you have?
 - Time: When do you want to achieve the set objectives?

Identify Stakeholders

Identify Stakeholders

Inputs

- .1 Project charter
- .2 Business documents
 - Business case
 - Benefits management plan
- .3 Project management plan
 - Communications management plan
 - Stakeholder engagement plan
- .4 Project documents
 - Change log
 - Issue log
 - Requirements documentation
- .5 Agreements
- .6 Enterprise environmental factors
- .7 Organizational process assets

Tools & Techniques

- .1 Expert judgment
- .2 Data gathering
 - Questionnaires and surveys
 - Brainstorming
- .3 Data analysis
 - Stakeholder analysis
 - Document analysis
- .4 Data representation
 - Stakeholder mapping/representation
- .5 Meetings

Outputs

- .1 Stakeholder register
- .2 Change requests
- .3 Project management plan updates
 - Requirements management plan
 - Communications management plan
 - Risk management plan
 - Stakeholder engagement plan
- .4 Project documents updates
 - Assumption log
 - Issue log
 - Risk register

Guidelines to Identify Stakeholders

- Review the project charter for the scope, boundaries, deliverables, and outcomes to get a sense of who may be affected.
- Set up a meeting and use the stakeholder analysis techniques to determine who has an interest in the project.
- Identify the stakeholder and the support they might provide.
- Use a classification model to organize your stakeholders.
- Develop a stakeholder register to record all pertinent information for each stakeholder.

The Project Team

- While initiating the project, you must think in people; People make projects happen!

You may be a superstar project manager, but you're not going to succeed if you can't put the right players on your team.

- Naturally, you want the best people in the organization to work on your project, but they may not all be available all of the time.

The Project Team

- **A Project Team:** is a group of individuals who collectively have the skills required to complete a project.
- The project team is headed by a project manager who is often selected by the stakeholders; usually, project teams work together only for a defined period.

The Project Team

- Most projects require a multi-disciplined team to perform the tasks required to accomplish the objectives.
- Building the project team is one of the most difficult challenges for project manager, starting with team member selection and continues on through the life of the project.

The Core Team Members

- During the initiation stage, a core team is selected.
- **The Core Team Members:** are key individuals who work on the major activities that the team will undertake during the project
- The core team helps the project manager plan and select implementation team members.

The Core Team Members

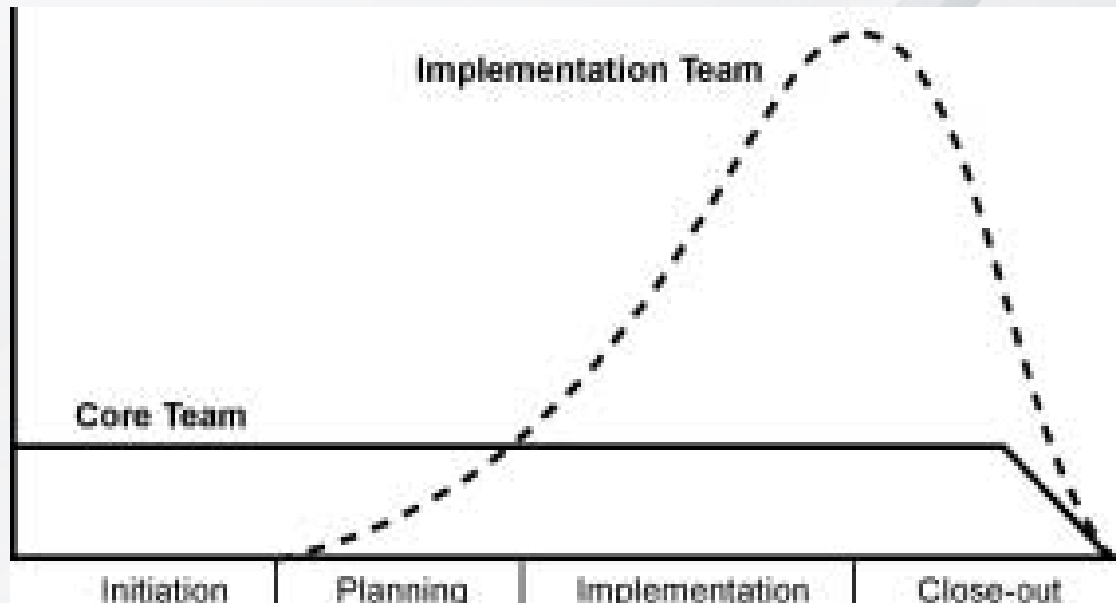
- In many projects, the core team is selected by the stakeholders.
- The project manager may be able to add individuals, but it is often politically difficult to remove individuals who were selected by the stakeholders.
- Frequently, core team members report directly to other managers (ex: Purchasing, marketing) rather than to the project manager.

The Project Implementation Team

- **Project Team Members:** (Implementation team) who help to carry out activities planned by the project manager the core team.
- Implementation team membership grows during the implementation phase.
- Some implementation team members may stay with the team for short time, while others may stay throughout the entire Implementation Phase.

The Project Implementation Team

- During the close-out phase, only those team members who are responsible for hand-off activities remain on the implementation team.



Virtual Project Team

- **Virtual Project Team:** a team not located in the same geographical area; but still be a part of the project team by communicating through tools such as the phone, instant messaging, online meeting, and Voice over Internet connections.
- A virtual team may face risks such as lack of proper interaction between the team members, time zone differences, misinterpretation due to differences in language, and technological incompatibility.



Thank You

