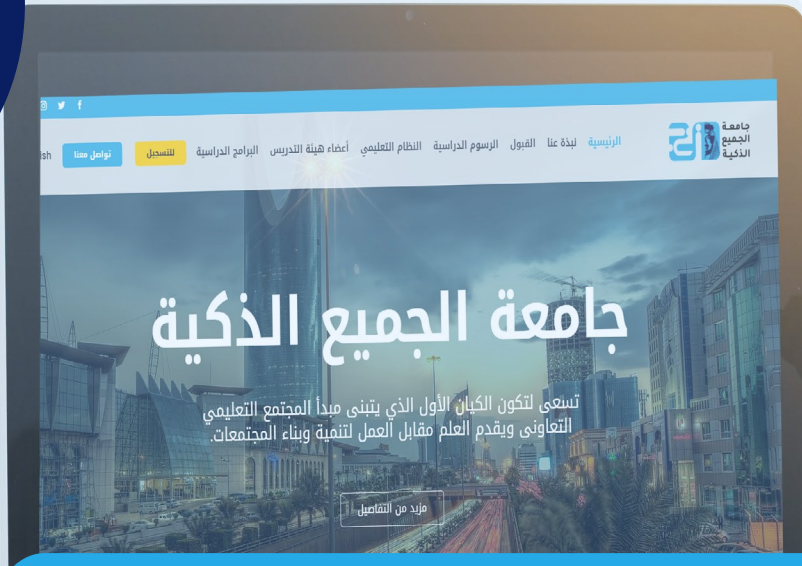


**Pre-Initiating &
Initiating Phase**

**Project Stakeholders, Scope
Milestones, Requirements
& Resources**



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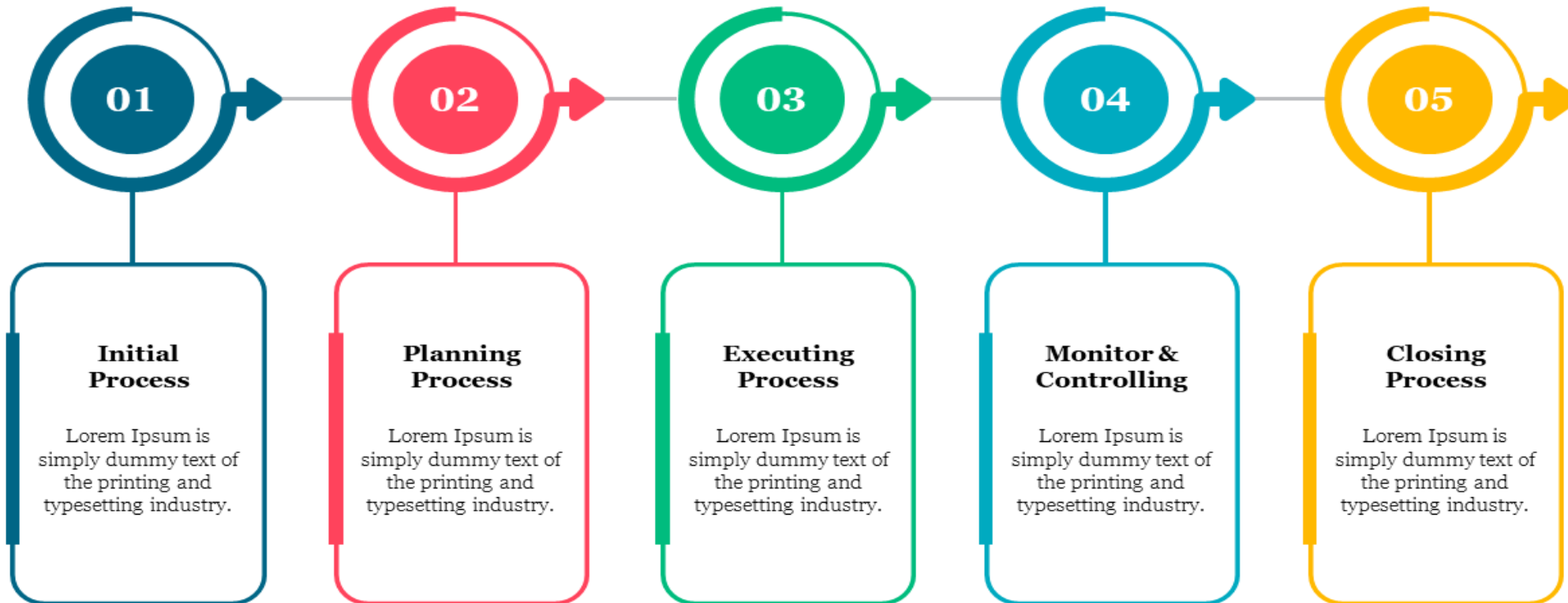
In the previous lessons...

- **A Project** is a series of tasks that need to be completed to reach a specific outcome.
- The 7 main areas (PMBOK) where **Project Planning** is important for successful Projects:



In the previous lessons...

Project Life Cycle Five Phases



In the previous lessons...

- **Project Documentation** is the process of recording the key project details and producing the documents that are required to implement it successfully.

9 Essential Project Documents

Project Business Case



RACI Matrix



Project Schedule

Project Charter



Change Request Management

Lessons Learned

Project Communications Plan



Risk/Issues Log



Work Breakdown Structure (WBS)

In the previous lessons...

A **Feasibility Study Report** is a formal document that helps us to identify and explore the proposed Project.

With the help of a **Feasibility Study Report**, we can identify the weakness and strengths of the Project helping us save our time and energy.

We can evaluate if the proposed Project will be profitable and feasible to us in future or not.

Types of Feasibility Study

1

Economic Feasibility

2

Legal Feasibility

3

Technical Feasibility

4

Operational Feasibility

5

Schedule Feasibility

Chapter Objectives

- Identify, organize and categorize a wide variety of Project Stakeholders explain the relationship between the Project Manager and other Stakeholders.
- Understand the Scope and its components.
- Recognize the Project Milestones.
- Determine the Project Resources and Requirements.

Syllabus

I- Project Stakeholders

II- Project Scope

III- High-level Milestones

IV- Project Requirements

V- Project Resources

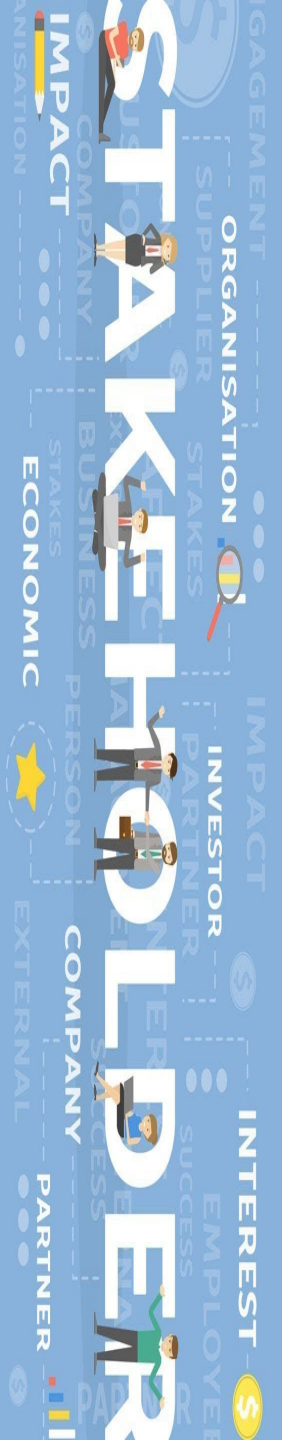
I- The Project Stakeholders

- A **Project** is a collaborative effort.

Even though you're in charge of managing it, in order for the Project to be successful you still need to rely on, work with, and report back to other people.

- Throughout this course, we've been talking a lot about the various people involved in taking a project from idea to execution: your **team**, **other departments within the organization**, **leadership**, **clients**, and more.

These people are your **Project's Stakeholders**.



I- The Project Stakeholders

1- Definition

- According to the **Project Management Institute (PMI)**, **Project Stakeholders** are defined as:

“Individuals and organizations who are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or successful project completion.”

➡ In other words, your **Project's Stakeholders** are the people or groups who have something **to gain** (or **lose**) from your **Project's outcome**.



I- The Project Stakeholders

- **Project Stakeholders** are any group of people that can have an influence or can be influenced by the project.

In other words, they have a stake in the Project.

- After completion, whether the project failed or succeeded depends on how much the stakeholders are satisfied.
- Now that you know the answer to the question “***what are project stakeholders?***”, the natural next question is “***who are the stakeholders in a project?***”.
- As we’ve already seen in the **Project Stakeholder** definition above, a stakeholder is anyone with an interest or investment in your project



I- The Project Stakeholders

I-2- Why Project Stakeholders are important?

- As mentioned earlier, any Project's success depends on the satisfaction of the Stakeholders.
- Understanding the needs and expectations of Stakeholders is very important for successful Project execution.
- The role of Stakeholders in **Project Management** is important because of the following reasons:



I- The Project Stakeholders

- They bring **experience** to the table

Stakeholders often provide invaluable expertise about the project. They have a sound understanding of the relevant process and how things work in the industry. Based on their experience, they can provide clear deliverables and identify **Project Constraints** that the project managers might not be aware of.

- They help identify **Risks**

The only way to mitigate risks is to first identify them. This is where Stakeholders can offer valuable insights. They might raise concerns at the beginning of the project and might want to discuss potential risks. Identifying **Project Risks** at the beginning can allow you to prepare accordingly and prepare contingency plans.



I- The Project Stakeholders

- They help increase the **chances of success**:
- Engaging with Stakeholders helps to have a clear view of the Project expectations right from the start.
- It also helps keep them on the same page regarding their expectations of the project, especially as the Project progresses.
- Taking continuous input from stakeholders might increase their interests and stakes in the project.

➡ This can increase the chances of the Project's success dramatically.

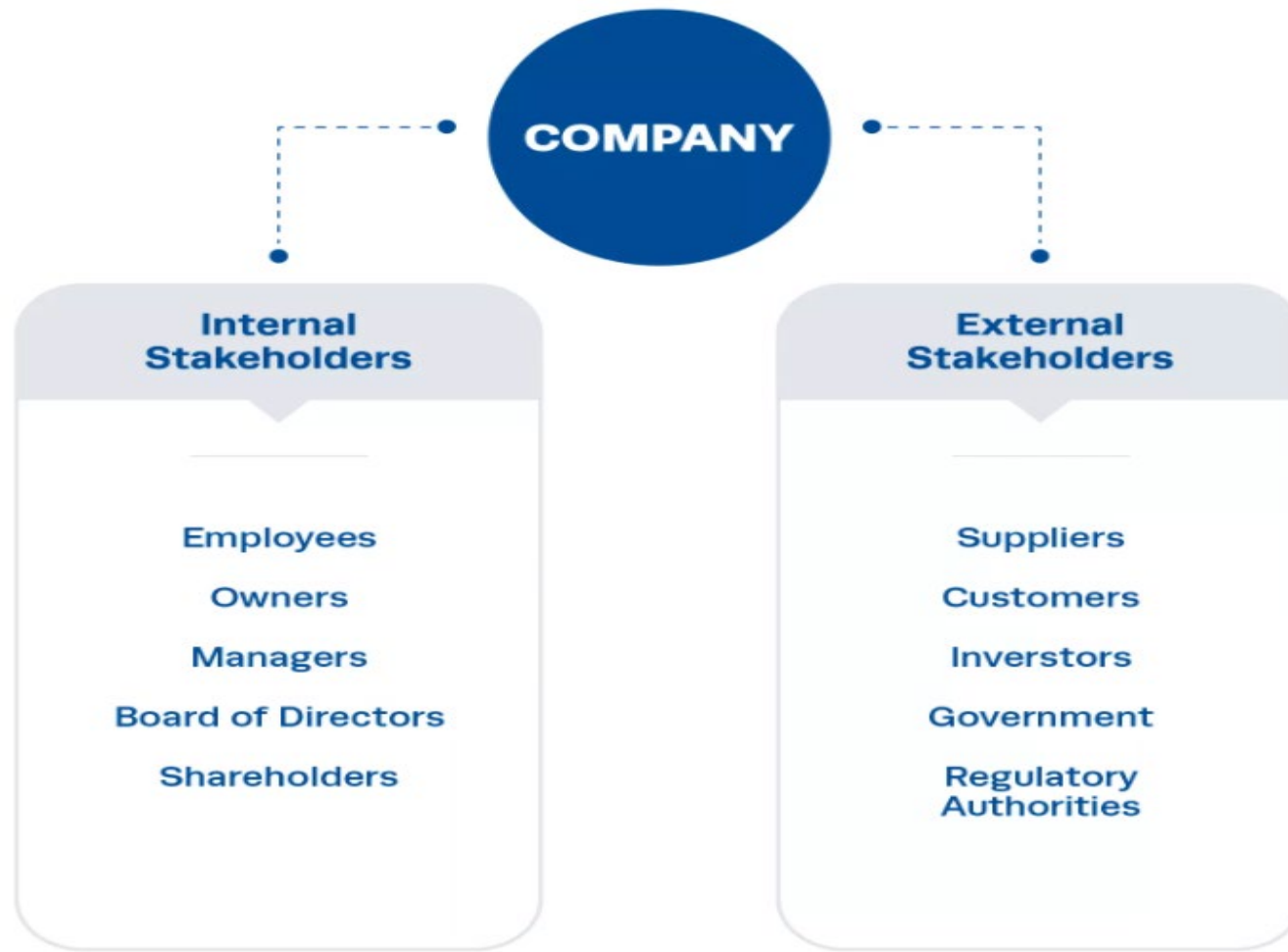


I- The Project Stakeholders

Types of Stakeholders

I-3- The two types of Project Stakeholders

Project stakeholders can be broadly categorized into two ways:



I- The Project Stakeholders

I-4-How to identify Stakeholders in a Project?

1. Project Charter

This document normally identifies the **Project Head, key sponsors, clients, and influencers.**

The Project Charter can provide useful insights for identifying the stakeholders.

2. Reviewing the Enterprise Environmental Factors

The enterprise environmental factors (EEF) may involve factors such as competition, the company's structure, and industry standards. Reviewing these factors can help you identify the stakeholders.

I- The Project Stakeholders

3. Interviewing the influencers

Interviewing the Project Management Experts and key influencers is also instrumental in identifying the key stakeholders.

4. Asking questions

Brainstorming sessions between the **Project Team Members** and **experts** are a great way of getting the Stakeholders involved. For getting a clearer picture, try answering :

- Who are this project's shareholders?
- Who is involved in the project? Directly or indirectly.
- Who gains if the project is successful?
- Who are the suppliers?
- Who can accept or reject the project?
- Who might be affected by the project's outcome?

I- The Project Stakeholders

I-5-How to do a Stakeholder Analysis?

- As soon as your **Project Charter** is complete and **the Scope** of your Project is defined, you can use it to start mapping out your Stakeholders.
- Here's how to get the ball rolling with a basic stakeholder analysis process.



I- The Project Stakeholders

1. Identify your stakeholders

First step, you need to identify who your Stakeholders actually are.

To do this, draw on your project **Charter** and any other **Project Plans and Documentation** to compile a full list of your project Stakeholders, both internal and external.

Bear in mind that some Stakeholders won't come into play until later in the project lifecycle — but if you can anticipate who they'll be in advance, you can start to get their buy-in, build the relationship from the outset, and help them to feel involved from the beginning



I- The Project Stakeholders

2. Prioritize your stakeholders

Once you've identified all of your Stakeholders, you can start to prioritize them.

It helps you, as the Project Manager, to identify who the key decision makers are at any given moment, so you can ensure that you're talking to the right people, at the right time.

There are a few methods of doing this **Stakeholder Prioritization**, but one simple way is to plot them out using a **Power/Interest Grid** or **Power/Influence Grid** or **Impact/Influence Grid**.

The Power/Interest Grid helps you to identify your key Stakeholders by answering two key questions that help you to group them into one of four categories:



I- The Project Stakeholders

Q1: What level of power do they have?

- How important is it that they're happy with the project's progress and results?
- How integral are they to the project's success?
- How influential are they to the project, to other stakeholders, to the team, and so on?

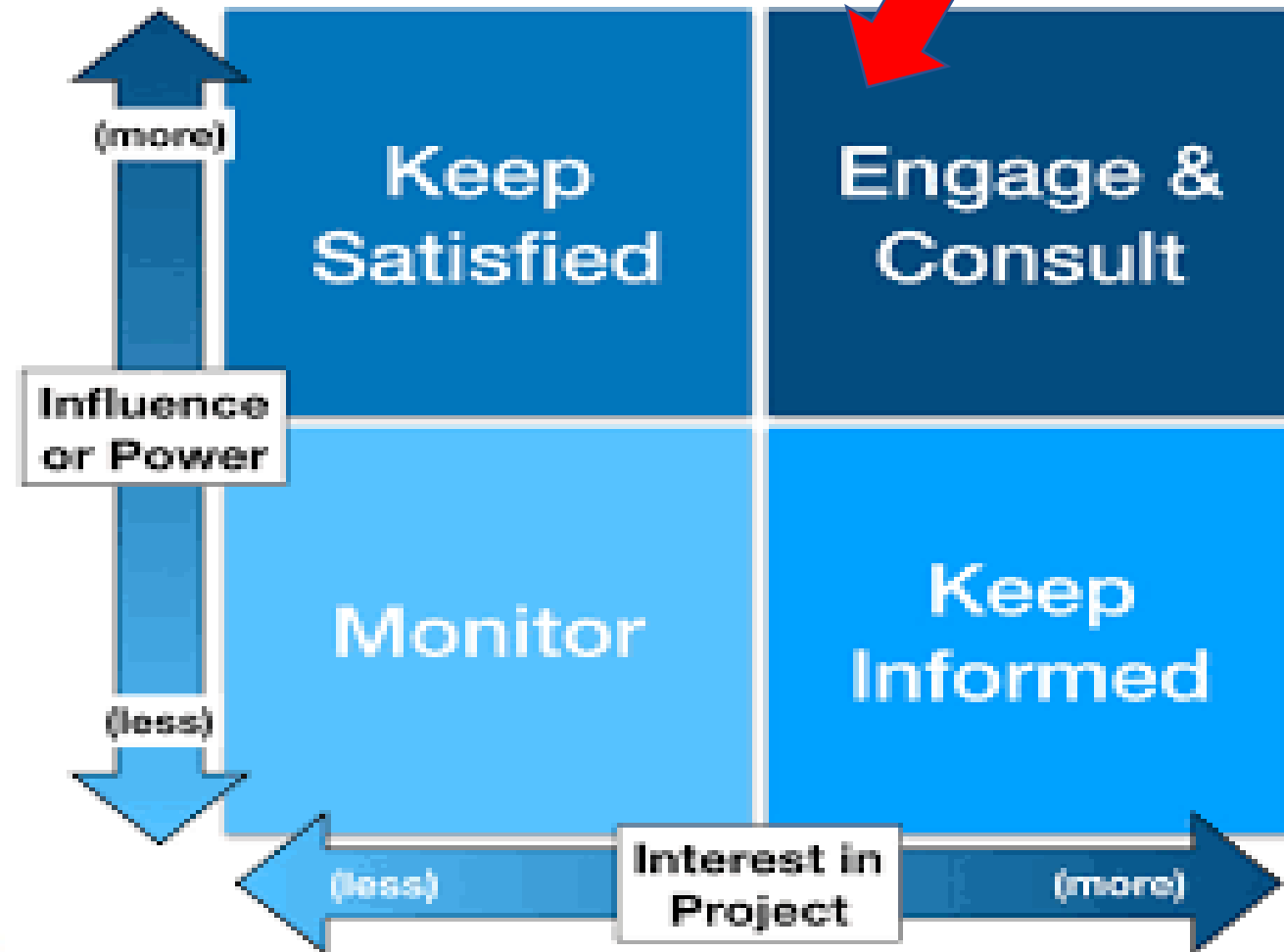
(a stakeholder's influence can be positive or negative!)

Q2: What level of interest do they have?

- Is this project super important to them, or are they only tangentially connected to it?
- Is it something they're directly accountable for?
- Are they reliant on it for other work or results?
- Are they opposed to the project or concerned about it in some way?

I- The Project Stakeholders

As we can see from the (highly technologically-advanced) matrix above, Stakeholders who fall into the top-right quadrant (**powerful + interested**) are the ones you should be giving extra attention to, because they're the ones who can have the most impact on your project — for better or for worse.



I- The Project Stakeholders



I- The Project Stakeholders



- We can also identify the key roles and responsibilities against major tasks within a Project, by the **RACI Chart** or **Matrix**, which serves as a visual of the role each person on a team is playing.
- Creating the **RACI Chart** is also an excellent exercise in balancing workload and establishing the decision-maker.
- **RACI** is a type of Stakeholders analysis just like a **Power Interest Grid**.

Lecture 5

RACI matrix example

R	Responsible
A	Accountable
C	Consulted
I	Informed

Project Activity / Deliverable	Project Manager	Consultant	Architect	Contractor	Client
Define functional and aesthetic needs	I	I	C	I	R
Assess risk	A	R	I	C	I
Define performance requirements	A	R	I	I	I
Create design	A	C	R	I	C
Execute construction	A	C	C	R	I
Approve construction work	I	I	C	C	R

I- The Project Stakeholders

3. Understand your stakeholders

Now that you know who the key players are and which ones to prioritize, you need to get a full grasp of their expectations for the Project.

Where possible, try to develop a full understanding of what matters most to your Stakeholders, as this has important implications for the mission your social Project pursues, the people you serve, and the impact that you will need to achieve and measure.

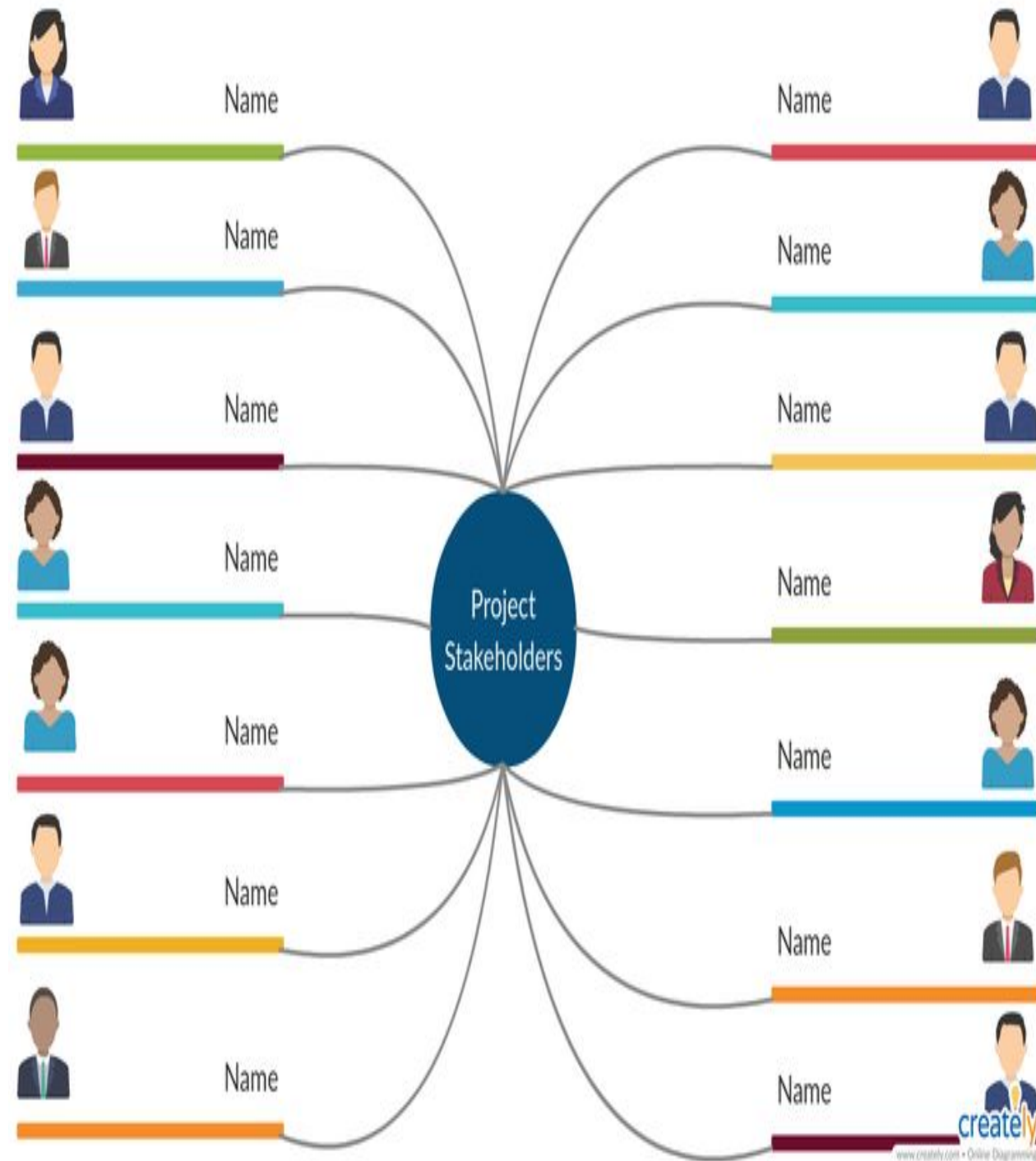
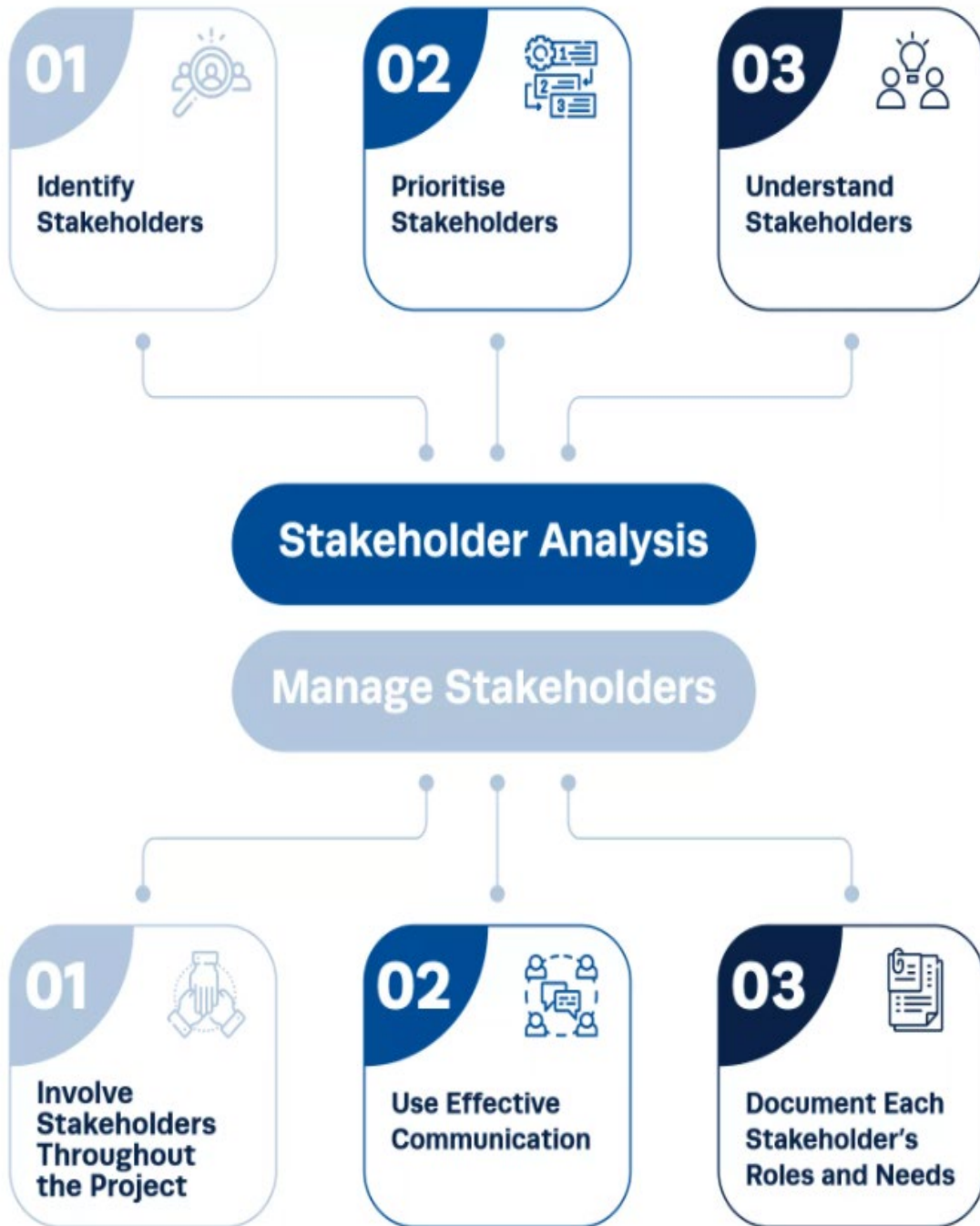


I- The Project Stakeholders

I-6- How to manage your Project Stakeholders?

- For a successful Project, your **key Stakeholders' Requirements, Project objectives** and **happiness** should be an ongoing concern throughout your Project.
- Your job as a Project Manager will sometimes involve pushing back on your Stakeholders and re-balancing their expectations with the **Project Charter** and **Project Plan** you all agreed on at the start.
- The tricky part is in **balancing everyone's needs, requirements** and **objectives** so you can keep your stakeholders happy — while also delivering the Project you set out to deliver.





I- The Project Stakeholders

- Part of being a successful Project Manager means understanding exactly what is needed to achieve the Objectives in a Project and mapping out how to get there.
- For every Project, no matter the size or complexity, it is the responsibility of the Project Manager to ensure it stays on track the entire time.
- The simplest way to do so is to define the Scope of the Project.



I- The Project Stakeholders

I-7- The Project Team and the Stakeholders

- The **Project Team** includes the Project Manager and the group of individuals who work together on a Project to achieve its objectives.
- It consists of the Project Manager, Project Management Staff, and other members who are maybe not directly involved with management but carry out the work related to the Project.
- The structure and characteristics of a **Project Team** usually vary, but the Project Manager's role as the Leader of the Team remains constant.



I- The Project Stakeholders

Project Team Roles

Project Manager



Project Team Member



Project Sponsor

Business Analysts

I- The Project Stakeholders

I-8- The Project Manager, Sponsor and other Stakeholders

I-8-1- Project Manager vs Project Sponsor

- While the two terms sound very similar, **Project Sponsors** and **Stakeholders** hold two very different roles.
- Both **the Project Sponsor** and **Project Manager** are highly involved in the Project and responsible for the outcome and success.
- **The Project Sponsor** is the **point of connection** between the Organization's Executive Team and the Project Manager.
- **The Project Manager** is the point of connection between **the Project Sponsor** and **the Project Team**.



I- The Project Stakeholders

- The traditional **Project Manager** is a leader, a decision maker, a planner who manages the Project and his Team and is the person accountable to the Business for accomplishing the Project Objectives.
- Project Manager's role is to manage the Projects and ensure that the Project meets the Requirements.



A Project Stakeholder

can be anyone who is affected by the Project—from members of the Project Team to people who aren't actively involved in the Project's process.

Stakeholders can be **Investors, Peers, Customers, or Superiors.**

A Project Sponsor

is generally not only part of the Organization but also accountable for the Project.

He is responsible for the overall success of the Project, and they typically define and ensure the Project's success. Depending on the Project, a Sponsor will also frequently act as a **mentor to the Project Manager.**

A Project Manager

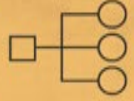
He organizes, tracks, and ultimately leads the Project Team to execute work within a project.

He is the **day-to-day team leader**—he is responsible for **monitoring Resources and workload, overseeing task completion,** and updating Stakeholders on the Project progress.

If necessary, the Project Manager can request **additional support from the Project Sponsor.**

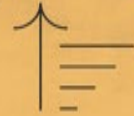
His role is to also keep an eye on the Goals and expectations to alert the Project Sponsor when there's a misalignment between the **schedule** and the **estimated dates.**

Project sponsor duties during the project lifecycle



Initiation

Appoint a project manager and define project success



Planning

Observe and monitor the project progress and team dynamics



Execution

Establish healthy boundaries with the project manager and support where needed



Performance

Evaluate project progress, identify, and solve any issues that arise



Closing

Ensure successful project hand-off and participate in the post-mortem



Project Manager

Project Manager Roles



Define project scope



Gather requirements



Time estimates



Identify resources needed



Manage budget



Report project progress



Focus on process



Allocate tasks



Prioritize features



Ensure quality



Manage vendors



Manage risks

I- The Project Stakeholders

I-8-2- The Project Analysts

- But most **Project Managers** don't have time for "on-the-ground" stuff like gathering data and doing paperwork.
- That's why organizations hire **Project Analysts** who help the **Project Manager** to plan and manage Projects.
- They provide the **Project Manager** with much of the data they need to make the big-picture decisions

I-8-3- The Steering Committee

- A **Steering Committee** is a form of corporate governance made up of high-level executives, authorities, or Stakeholders who provide strategic oversight and guidance to one or more projects within an Organization.
- When these people meet, it's called a **Steering Committee** meeting.



Steer Co

"Senior management empowered to make decisions"

Sponsor

"Passionate about the business case"

Programme / Project Manager

"Responsible for delivery of the business case for the Sponsor"

Project Team

"Dedicated ring fenced resources to deliver agreed work packages"

Programme Management Office
"Custodian of standards, costs & benefits, provide execution support to drive the delivery"

Stakeholders

"Interested parties who need to be either consulted or informed"



II- Project Scope

II-1-What is Project Scope?

- **Project Scope** is the part of Project Planning that involves determining and documenting a list of specific **project goals, deliverables, tasks, costs and deadlines**.
- The documentation of a project's scope is called a **Scope Statement** or **Terms of Reference**.

It explains the **boundaries of the Project**, establishes **responsibilities for each team member** and sets up **procedures for how completed work will be verified and approved**.



II- Project Scope

- During **the Project**, this documentation helps the Project team remain focused and on task.
- Note that a **Project's Scope Statement** should not be confused with its Charter; a **Project Charter** simply documents that the Project exists.
- The **Scope Statement** also provides the team with **guidelines for making decisions about change requests during the Project**.
- That ensures everyone on the Team understands the extent of the Project and agrees upon exactly how the Project's Goals will be met.



II- Project Scope

II-2- How to define the Scope of a Project

- Defining Project Scope requires input from the Project Stakeholders. They work with Project Managers to establish the key elements of **budget, objectives, quality** and **timeline**.
- **To determine Scope**, Project Managers must collect **Requirements** for what the Stakeholders need from the Project. This includes the following elements:
 - * the **Project's Objectives and Deliverables**;
 - * **when the Project must be completed**; and
 - * **how much the Stakeholders can pay for it**.



II- Project Scope

II-3-Scope Statement

- Creating an **accurate document** that **outlines the goals, deadlines and relationships that shape the Project** is called **the Scope Statement**.
- Including specific elements within this document will help build an effective **Scope Statement** that will **minimize the risk of change orders and disruptions**, while **staying on Budget**.



II- Project Scope

A Project Scope Statement includes **the final deliverables**, as well as any **constraints, resources** and **key features** identified within the project. In short, it lays out **the boundaries of the entire Project**.

- A good **Scope Statement** is essential to **reinforce the Project Scope** for all **involved parties**. It will encourage **successful buy-in** from potential **Stakeholders**, as well as ensure that **all Project participants** are on the same page.
- It also helps to **filter irrelevant tasks**, which **prevents wastage of time and Resources**.



II- Project Scope

- **Project Scope Statement** can often determine the difference between a successful and unsuccessful Project.
- To ensure that you meet all the main aspects of the statement, the following points are important to include in your **Project Scope Statement**:
 - * **Justification**
 - * **Exclusions**
 - * **Description of the Scope**
 - * **Deliverables**
 - * **Assumptions**
 - * **Main Objectives**



II- Project Scope

The following are some must-haves in the Scope Statement:

Business Case: Why the Project is required and what benefits are expected to be delivered.

Project Description: An overview of the project's final deliverable.

Success Criteria: The key components that will constitute a successful project as pre-agreed upon with the clients and stakeholders.

Limitations: Any resources or technology related issue that may limit the project.

Assumptions: Any assumptions that have been made and will affect the final outcome.

Once a **Project Manager** has defined these factors within the framework of a Project, the Scope will be much easier to manage. **Staying on top of Project Scope is critical to success** and losing track is one of the biggest mistakes a Project Manager can make on a job.



II- Project Scope



II-4- The importance of defining a Project's Scope

- Writing a **Project Scope Statement** that includes information on the Project Deliverables is a first step in Project Planning.
- The benefits a Project Scope statement provides to any organization undertaking a new initiative include the following:

*articulates what the project entails so that all stakeholders can understand what's involved;

*provides a roadmap that managers can use to assign tasks, schedule work and budget appropriately;

*helps focus team members on common objectives; and

*prevents projects, particularly complex ones, from expanding beyond the established vision.

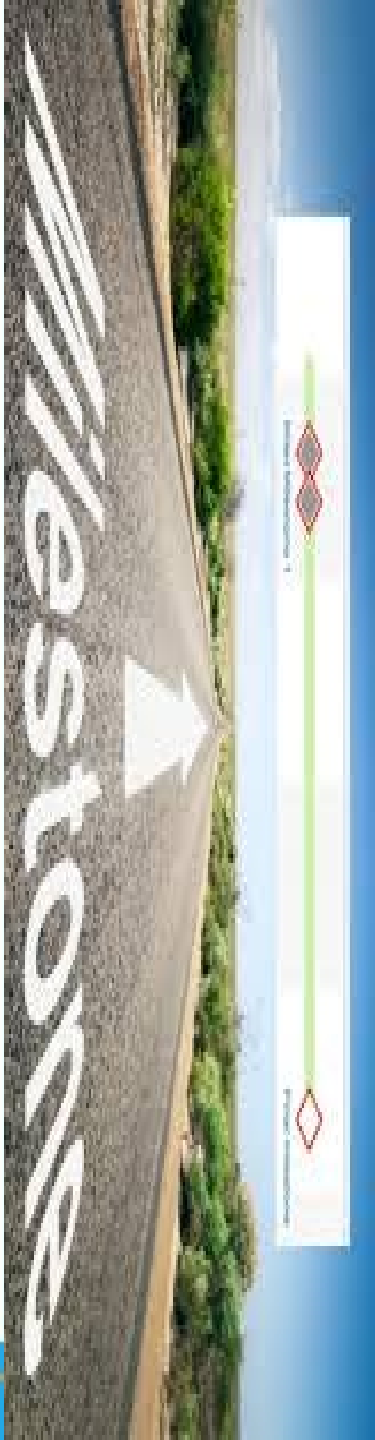
*Establishing project scope ensures that projects are focused and executed to expectations.

The Scope provides a strong foundation for managing a project as it moves forward and helps ensure that resources aren't diverted or wasted on out-of-scope elements.

III-High-level Milestones

III-1- What is a Project Milestone?

- A **Milestone** is a marker in a Project that signifies a change or stage in development.
- **Project Milestones** mark **specific points along a Project's Timeline**.
- They are checkpoints that identify **when activities or groups of activities have been completed** or when a **new phase or activity is launched**.



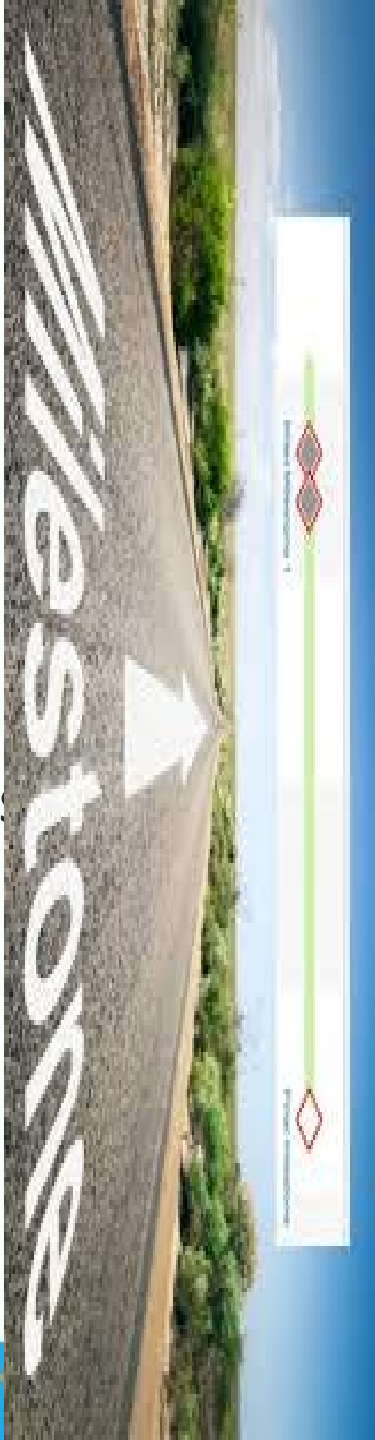
III-High-level Milestones

- **Milestones** are powerful components in Project Management because they show key events and map forward movement in your Project Plan.
- **Milestones** act as signposts through the course of your Project, helping ensure you stay on track.
- Without **Project Milestones** tracking, you're just monitoring tasks and not necessarily following the right path in your Project.
- You can differentiate **Milestones** from other elements of a Timeline because they **take no time to complete**; think of them as **signposts that keep things on track**.



III-High-level Milestones

- A milestone schedule, or milestone chart, is simply a timeline that uses **milestones to divide a project schedule into major phases**. Due to its simplicity, it's used when project managers or sponsors need to share an overview of the project schedule with stakeholders or team members without going over every detail.
- When you plan a project, you consider all possible details, from main goals to schedules. These details can have regular adjustments, so it's critical to visualize them to let your team understand how to achieve their final objectives.
- Here's how a project planning milestone example can be visualized in **GanttPRO Gantt Chart maker**:



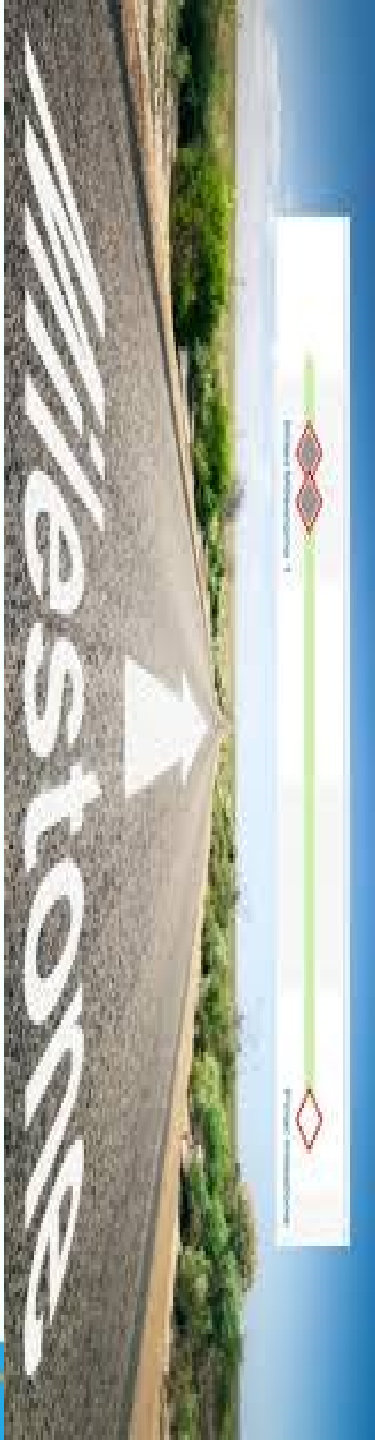
III-High-level Milestones



III-High-level Milestones

III-2- Why are Project Milestones important?

- **Milestones** are powerful because they demonstrate forward progress in your Project Plan.
- They help **motivate** and **align the Project Team** by enabling everyone to view progress and judge priorities.
- And they help you **monitor deadlines, identify important dates, and recognize potential bottlenecks within the Project.**
- If you, as a Project Manager, were to strip the tasks from your **Project Timeline**, the **Milestones** would still **give an outline of the key steps or phases of the Project.**



III-High-level Milestones

5 reasons why key Milestones are important to Project Success

1. Milestones improve Project delivery. Milestones break a large, complex Project into smaller phases.

2. Milestones facilitate communication with stakeholders. Milestones help you track project progress. It's a way to measure your progress, and how far are you from completing the Project?

3. Project landmarks act as checkpoints.

4. Milestones keep stakeholders and the team on track. Milestones serve as reminders to stakeholders about important Project events.

5. Milestones improve team engagement. The project mentor doesn't have to be around dry assignments and review meetings. It's also an opportunity to congratulate your team and celebrate. Depending on your budget, you can give your team a thank you note, take them to lunch, or even offer a reward.



IV- Project Requirements

IV-1- What Are Project Requirements?

- **Project Requirements** are **conditions or tasks** that must be completed to ensure the success or completion of the Project.
- They provide a **clear picture of the work that needs to be done**.
- They're meant to align the project's resources with the objectives of the organization.
- The benefits of effectively gathering Project Requirements include cost reduction, higher Project success rates, more effective change.



IV- Project Requirements

V-2- Project Requirements Categories

Business requirements

- They are the high-level needs of the business.
- They address what's required and why the project is happening.

Solution Requirements

They include both **functional** and **non-functional requirements**.

They are the **specific features** and **characteristics of the product or service** that meet all requirements, both Business and Stakeholder.

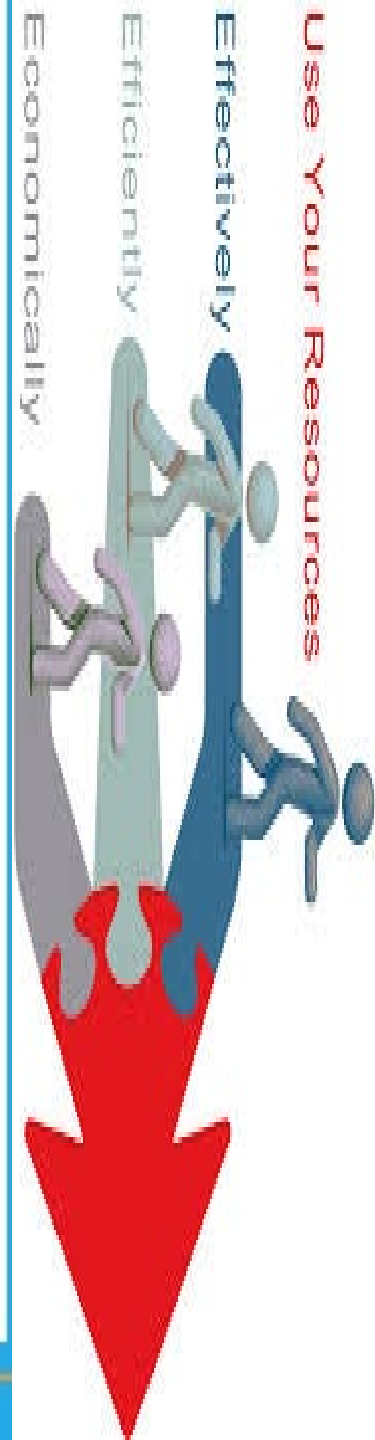
A Stakeholder

- Every individual Stakeholder has **specific needs** or **requirements** that they want to be fulfilled.
- Often times, stakeholders have **competing needs**, which can impact the schedule, budget, and scope of the project if not managed effectively.

V- Project Resources

V-1-What are the types of Resources used in Projects?

- **People, Processes, and Technology**, also referred to as the **Golden Triangle**, are essential for successful **Project Implementation**.
- So, to get the work done, you need **labor**, and they, in turn, need **materials, equipment**, and a **place to carry out the Project activities**.
- On an Enterprise level, **Project Resources** can be **human and non-human**, which includes but not limited to:



Consumables & materials:

- These are the **consumables** needed to generate the final **product (good or service)**
- **The materials**
(for a road construction project are soil, rock aggregates, binders like lime, bituminous materials, cement, etc.)

Facilities

Resources need an **environment for Project execution**, such as land, conference room, office space, accommodation, and more.

Labor

Labor or **Human Resource** forms the backbone of any Project and comprises **employees** (part-time or full-time) and **contingent staff** with various skill sets required for delivery.

Equipment & Tools

- It covers all the tangible assets (machinery, plant, equipment, etc.) and intangible assets (software, process, methods, and even ideas).
- These assets might change depending upon the type and nature of the organization.

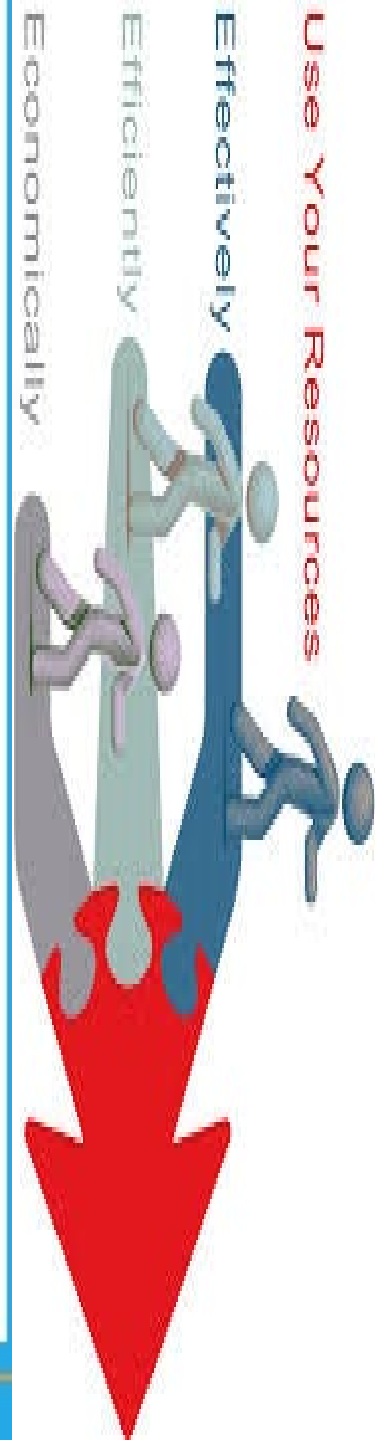
Finance

The most significant resource is **the money required** to procure the resources and carry out the necessary work.

V- Project Resources

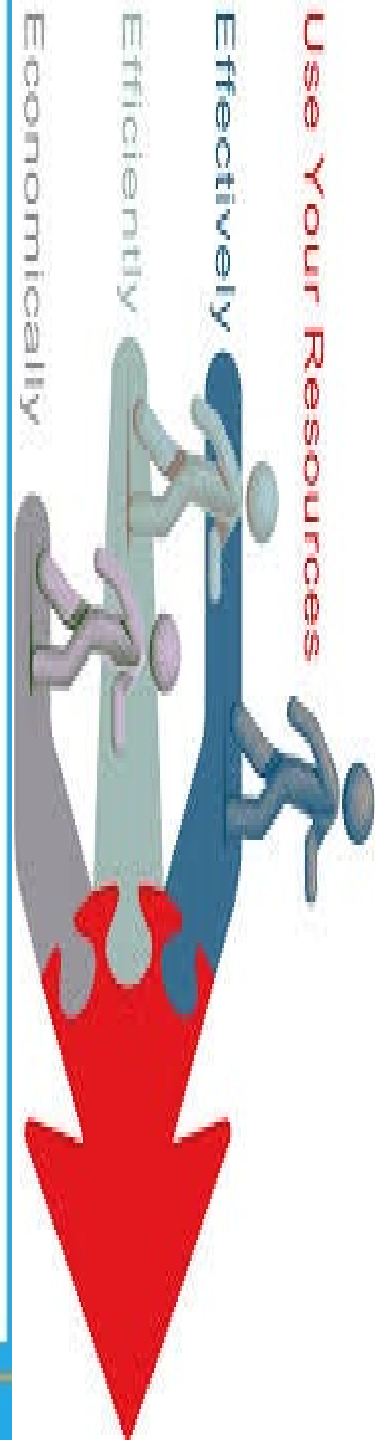
V- 2- Why is Project Resource Planning important?

- As a Project Manager, your primary concern is: ***How do I deliver a Project on time and within the stipulated budget?***
- Effective **Project Resource Planning Strategy** aims to **meet the delivery commitments** and **enhance client satisfaction**. It also improves the **Team's performance, engagement, and productivity**.
- Once the Resources and the Skills in place, we need to master the art of **scheduling, forecasting, and planning efficiently** for the **Project's success**.
- **Efficient Project Resource Planning** also ensures **maximum resource utilization profitability**.



V- Project Resources

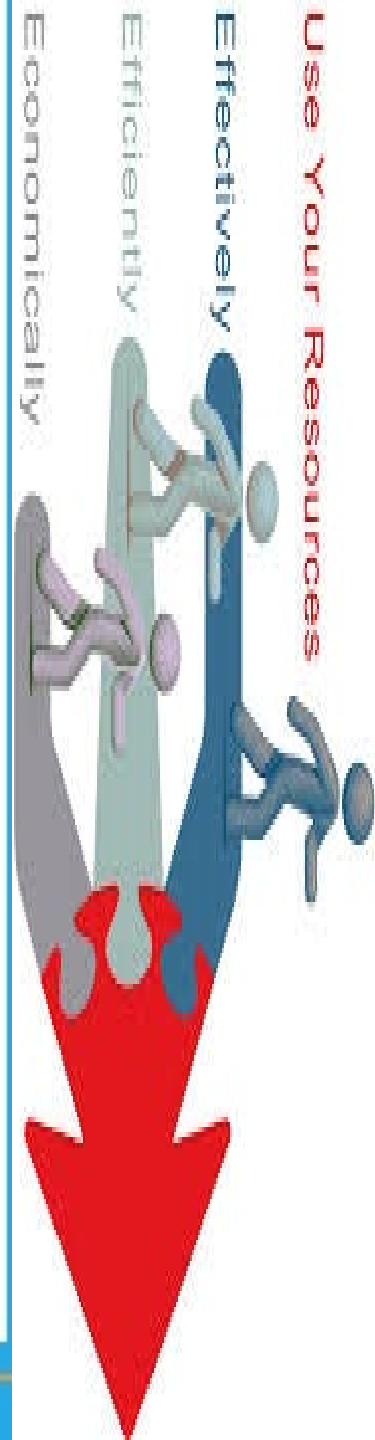
- Effective **Project Resource Planning** provides a clear picture of who is doing what and how long they need to accomplish the same.
- It helps you visualize underutilized Resources or those getting rolled off from tasks and re-allocate them to suitable project vacancies.
- Therefore, **Project Resource Management** is a continuous process, and by implementing the right solution, one can take preventive measures to meet the overall Objectives.



V- Project Resources

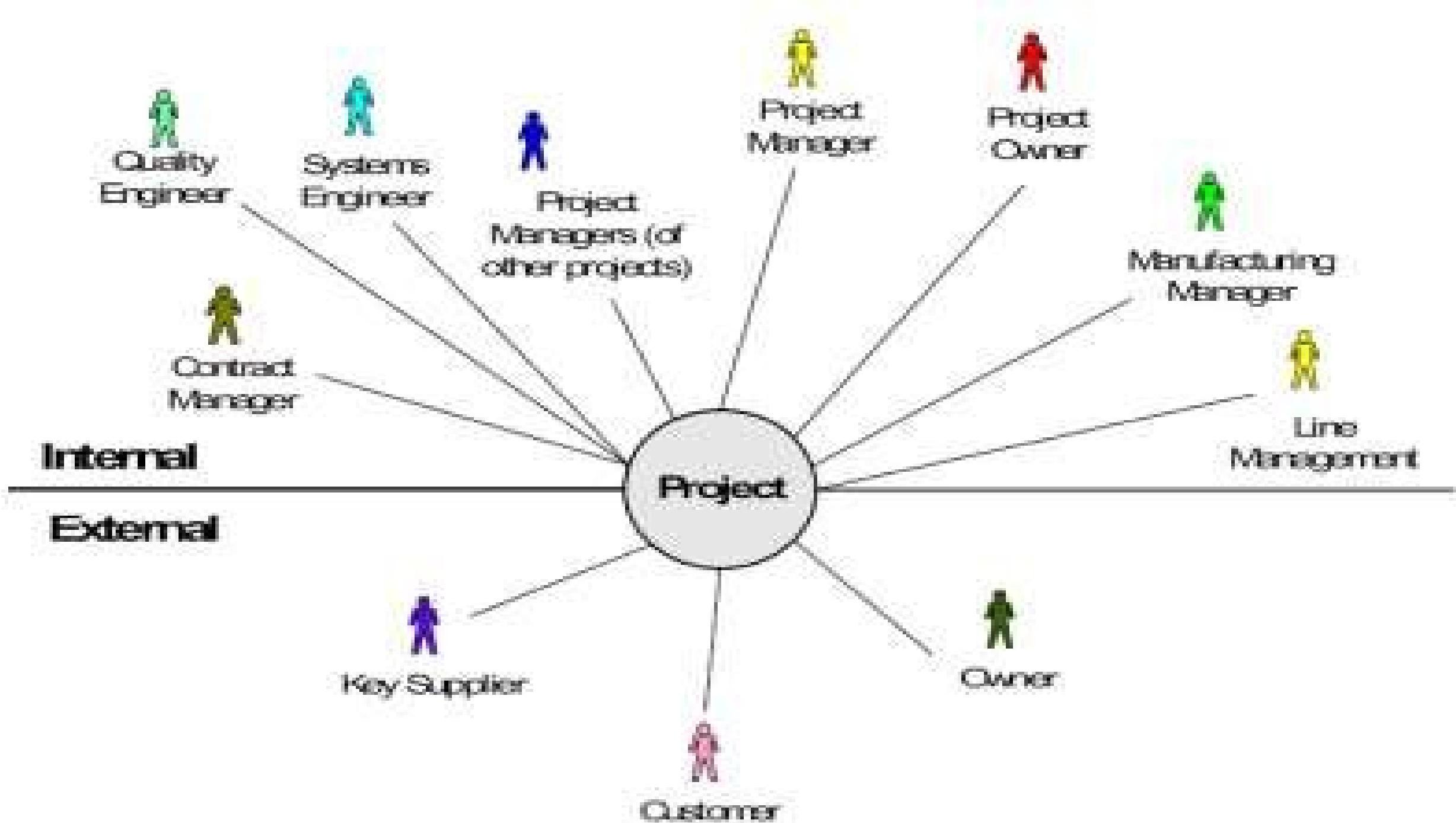
IV-3-How to create a Project Resource Plan?

- For every successful Project, the journey starts with creating an **efficient Project Resource Plan**.
- Using **Resource Management Solutions**, Project Managers can plan, organize, and manage the Project Resources effectively.



A spiral-bound notepad with a white cover and a spiral binding on the left side. The word "SUMMARY!" is written in a large, black, sans-serif font on the notepad's page. The notepad is placed on a light-colored wooden surface. Numerous colorful clothespins (red, blue, green, yellow, orange, purple, pink, and white) are scattered around the notepad, some attached to it and others on the surface. The clothespins are of various sizes and are arranged in a somewhat circular pattern around the notepad. The background is a light-colored wooden surface with a visible grain pattern.

SUMMARY!



Responsibilities of a project sponsor



Vision and people



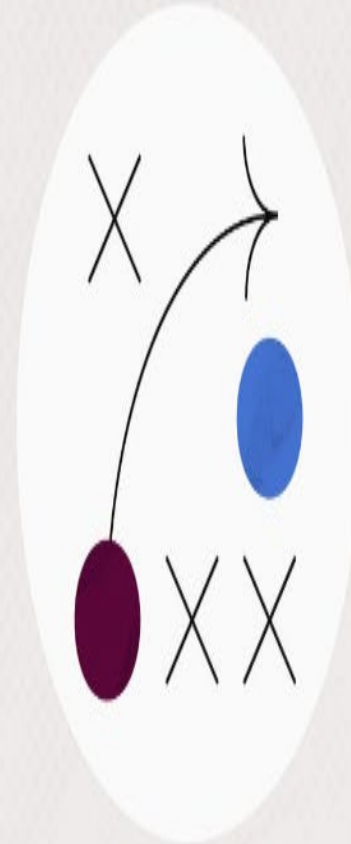
Governance



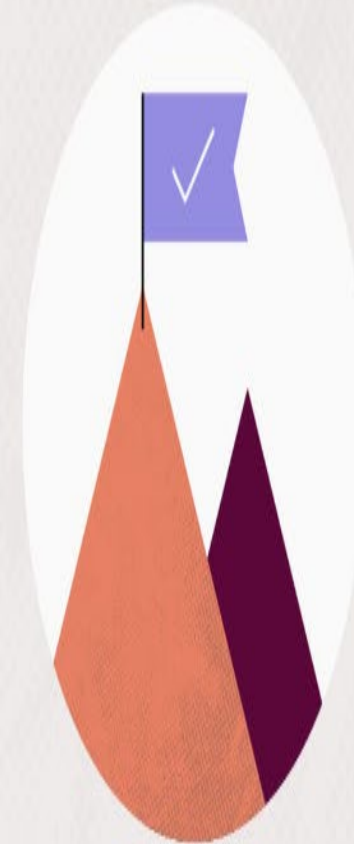
Value and benefits



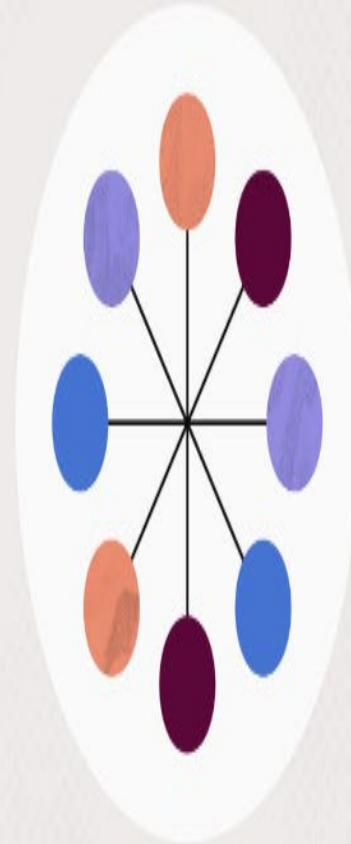
Program manager roles and responsibilities



Implement strategies

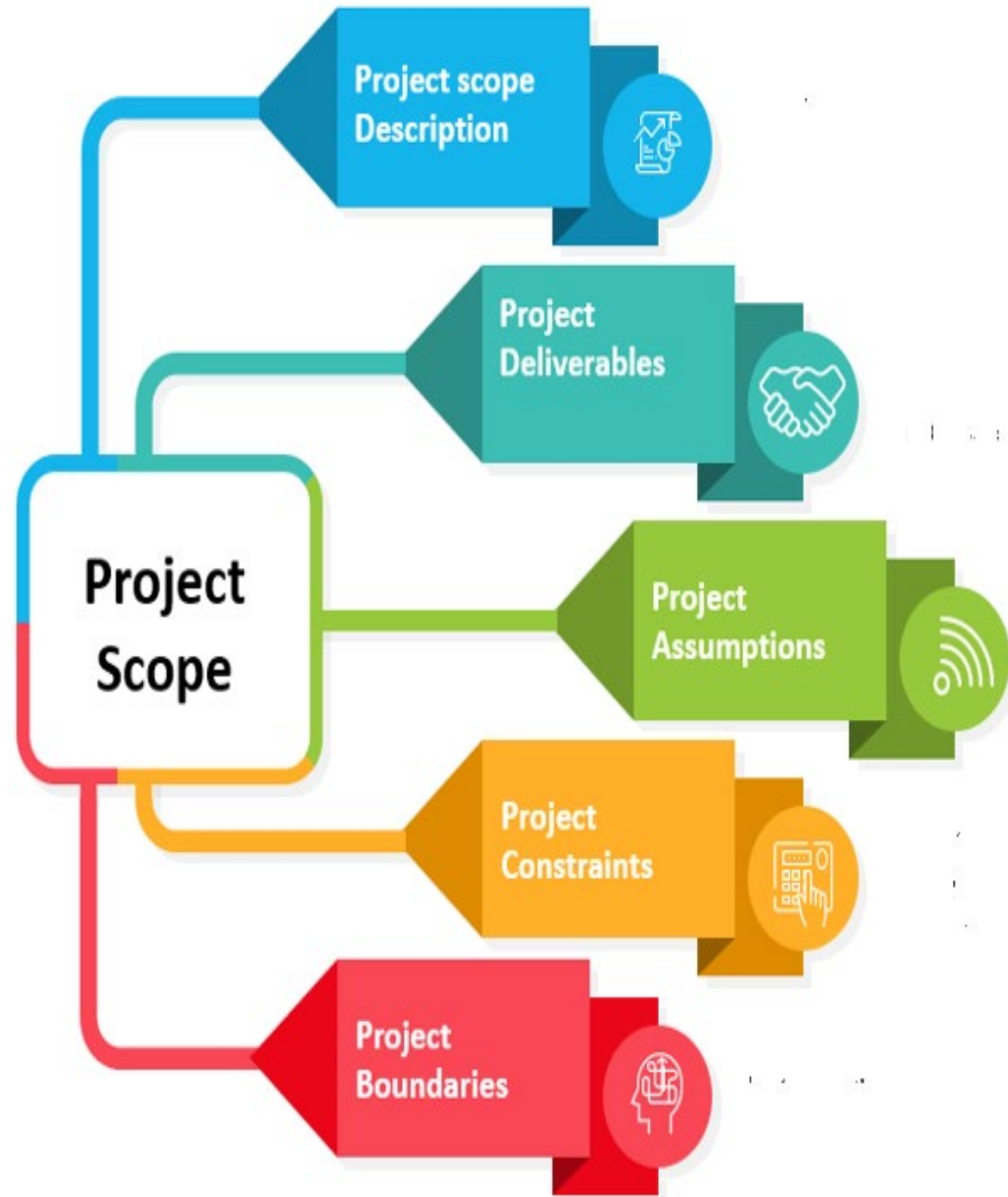


Define success metrics



Oversee collaboration

PROJECT SCOPE



PROJECT MILESTONES



Service User
Product Must-Have
Don't Include
Functional Business
Requirements
Market Technical
Nice-to-Have
Customer Include
Project Process

Project Resources



SEE YOU

NEXT TIME