

project

MANAGEMENT
GUIDE



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The contents of this Project Management Guide have been put together based on best practices as defined by the Project Management Institute (PMI). This tool is meant to be used as a guide and to provide a framework for managing a project.

foundation key concepts

Project: a temporary endeavor undertaken to create a unique product, service or result.

Program: a group of related projects that are coordinated allowing for more control.

Portfolio: a collection of projects and programs that are aligned to achieve strategic business objectives.

Baseline: the original approved plan plus/minus approved changes; the current approved version of the plan.

Historical Information: documents or data from previous projects which are used to assist in future project decisions.

Stakeholder: a person or organization who is actively involved in the project, or whose interests may be positively or negatively impacted by the project, or who might exert influence over the project.

Business Case (reasons to do a project): market demand, business need or strategic opportunity, customer request, technological advance, legal requirement, ecological impact, social need.

Project Manager: tasked with achieving the project objectives; lead person responsible for communicating with all stakeholders including sponsor; may report to a functional manager or program or portfolio manager.

integration management

Project Charter: formally authorizes the project to exist, establishes the project manager's authority and documents high-level requirements, milestones, budget, risks and success criteria.

Three-Point Estimating: a weighted average method used to increase estimation accuracy; uses Optimistic, Pessimistic and Most Likely estimates to calculate the estimated activity cost or duration; Beta Distribution Formula (PERT): $(O+4 \times ML+P)/6$; Triangle Distribution Formula: $(O+M+P)/3$.

Critical Path: the path of activities along which any delays will cause the project to be delayed; the longest duration path through the schedule network diagram; the chain of tasks which all have 0 float.

Schedule Compression: used to shorten the project schedule; two methods: Crashing (adds extra resources, results in higher costs) or Fast-tracking (doing activities in parallel, which increases risk).

Milestone Schedule: a summary schedule which only shows key points in the project.

Gantt Chart: a type of bar chart used to display the project schedule with the bar lengths representing activity durations.

Schedule Baseline: the accepted and approved version of the project schedule.

risk management

Risk: uncertainty; an unknown future event; positive risks are opportunities; negative risks are threats.

Residual Risk: any risk that remains after the risk response strategy has been implemented; left-over risk.

Secondary Risk: risks that occur as a result of implementing a risk response strategy.

Qualitative Risk Analysis: a quick and easy risk assessment method that combines the probability and impact to assign a risk score.

Quantitative Risk Analysis: a more rigorous risk assessment which numerically analyzes the effect of identified risks on overall project objectives.

Probability and Impact Matrix: a matrix used during qualitative risk analysis that multiplies the risk probability (high, medium or low) by the impact to come up with a risk score, which is then used to create a prioritized list of risks.

Threat Strategies: Avoid (change something so that the threat no longer exists), Transfer (shift the risk to a third party, perhaps via a contract), Mitigate (increase or decrease the probability and/or impact, an alternate plan), Accept (includes passive and active approaches).

stakeholder management

Stakeholder Register: lists stakeholders and relevant details for each.

Issue Log: tracks disagreements and/or unresolved matters and outlines plans for resolving.

human resource management

Expectancy Theory: employees are motivated by the expectation of realistic positive outcomes and related rewards.

RACI Chart: Responsible (does the work), Accountable (ensures the work is done), Consult (input required from SME), Inform (updated on status); a type of RAM.

Interpersonal Skills: leading, influencing, effective decision-making; a.k.a soft skills.

Primary Sources of Conflict: Schedule, Resources and Priorities account for 50% of project conflicts.

communications management

Communications Management Plan: documents who sends info, who receives info, what info is sent, how info is sent, when and how often info is sent.

Number of Communication Channels: $n(n-1)/2$.

Communications Methods: interactive (multi-directional, such as a meeting), Push (one-way outbound, such as an email), Pull (one-way inbound, such as a download from a website; self-service).

Communication Types: Formal Written (complex problems, project management plans, memos, contracts), Formal Verbal (presentations, speeches), Informal Written (email, handwritten notes), Informal Verbal (meetings, conversations).

PROJECT CHARTER TEMPLATE

Instructions – Use the Project Charter to provide a brief project background, define initial scope, establish target timing and assign Project Sponsor and Project Management roles. Ideally, the Project Manager and Project Sponsor work together to complete the charter. As a Project Manager, use the chartering process as an opportunity to work with Sponsor to gain clarity regarding the project.



DATE _____
PROJECT CHARTER: Project XYZ

1. Project Description

1.1. _____

2. Project Management

2.1. Assigned Project Manager: _____
 2.2. Project Sponsor: _____

3. Business Needs

3.1. _____

4. Project Justification

4.1. _____

5. Current Status

5.1. _____

6. Initial Project Details

6.1. Project Scope Statement _____

6.2. Project Deliverables

Major Milestones/Deliverables	Description	Due Date

7. Lessons Learned from past projects to consider

Learning	Details	Improvement for Project XYZ

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STAKEHOLDER REGISTER TEMPLATE

Instructions – Take time to identify all relevant project stakeholders. Remember, a stakeholder is a person or organization who is actively involved in the project or whose interests may be positively or negatively impacted by the project. This document will guide your project communication strategy.



Stakeholder Register - Project XYZ

Name	Position	Internal/External	Role	Contact Information
CORE TEAM MEMBERS				
Member 1	VP AIDG	Internal	Project Sponsor	ext XXXX
Member 2	Project Manager	Internal	Project Management	ext XXXX
Member 3	AIDG Manager	Internal	Business Case/Front End	ext XXXX
Member 4	Director Sourcing	Internal	Sourcing	ext XXXX
Member 5	Brand Manager	Internal	Marketing	
Member 6	Quality Specialist	Internal	QA	ext XXXX
Member 7	R&D Project Leader	Internal	R&D	ext XXXX
Member 8	SC Project Manager	Internal	Project Management - SC	ext XXXX
Member 9	Primary Packaging	Internal	Primary Packing	ext XXXX
Member 10	Director Operations	Internal	Operations	ext XXXX
Member 11	Demand Planner	Internal	Demand Planning	ext XXXX
Member 12	Supply Chain	Internal	Supply Chain	ext XXXX
Member 13	Sales Planner	Internal	Sales Rep	
ADDITIONAL STAKEHOLDERS (Support)				
Support 1	Finance	Internal	Finance	ext XXXX
Support 2	Legal	Internal	Legal	ext XXXX
Support 3	AIDG Research Manager	Internal	End user Research	ext XXXX
Support 4	Brand Manager	Internal	Marketing	ext XXXX
Support 5	Director Marketing	Internal	Marketing	ext XXXX
Support 6	Sourcing	Internal	Sourcing	ext XXXX
Support 7	VP Quality	Internal	Quality	ext XXXX
Support 8	Director Supply Chain	Internal	Supply Chain	ext XXXX
Support 9	LATM	Internal	LATM sales/marketing	ext XXXX
Support 10	VP Supply Chain	Internal	Supply Chain	ext XXXX
Support 11	VP Marketing	Internal	Marketing	ext XXXX
Support 12	Americas President	Internal	Americas Leadership	ext XXXX
Support 13	VP Sales	Internal	Sales	ext XXXX
Support 14	VP Finance	Internal	Finance	ext XXXX
Support 15	Canada Sales Marketing	Internal	Canada	
Support 16	Canada Sales Marketing	Internal	Canada	ext XXXX
Support 17	HR	Internal	HR	ext XXXX
Support 18	CCD	Internal	Customer/Shopper	ext XXXX
Support 19	CCD	Internal	Customer/Shopper	ext XXXX
Support 20	VP R&D	Internal	R&D	ext XXXX
Support 21	Marketing Research	Internal	Marketing	ext XXXX
Support 22	Trade Marketing	Internal		ext XXXX

COMMUNICATIONS MANAGEMENT TEMPLATE

Instructions – Use this template to define stakeholder communication requirements. This document will set expectations for frequency and format of all project communication.

COMMUNICATIONS MANAGEMENT PLAN

Project Title:

Project Start Date:

Projected Finish Date:

1. Stakeholder Communications Requirements

This project has specific objectives that must be met in order for the product to be ready for (RTS Date) sell in. All internal project stakeholders including; sponsor, core team member and executive leaders will have specific communications needs in the months leading to our launch date.

Additionally, all external stakeholders, including the material suppliers, manufacturers and design agencies, will have their own set of communications needs in the months leading to the launch date. It will be crucial to communicate effectively with these external stakeholders to align our project implementation and scheduling requirements with their own.

2. Communications Summary

The following table summarizes key stakeholders, communications required, the delivery method or format of the communications, who will produce the communications, and when it will be distributed or the frequency of the distribution. All communications produced will be archived and available on the Y shared drive (Y – AIDG – Project Documentation). As more communications are defined by the Project Manager, they will be added to this list. The project team will use various templates and a checklist.

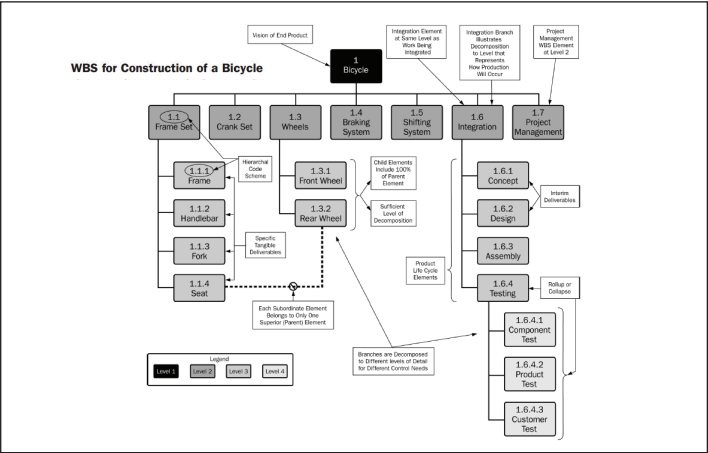
Stakeholders	Type of Communication	Delivery Method/Format	Producer	Due Date/Frequency
Sponsor (Patricia)	Weekly Status Report	Hard copy and short meeting	Dusan	Mon 3-4pm
Core Team – Bruce B.	In Person Weekly Meetings	Weekly Meetings/E-mail meeting notes 48hrs post meeting	Dusan	Weekly – Thursday
Executive Leadership (Patricia, Tim, Mike F., Pete D., Kevin, Ernie, Rob, Rich C.)	In Person PowerPoint Update	In Person Key Milestone update in addition to Quarterly Americas Meeting	Dusan	As Needed
Executive Leadership	Project Dashboard Report	E-mail	Dusan	Monthly
Outside Vendors	Phone Call	Weekly	Paul	TBD
Key Stakeholders (outside Core Team)	In person meetings/E-mail	Department meetings, in person updates	Core Team Members	Ongoing

WORK BREAKDOWN STRUCTURE (WBS)

Instructions – Use the WBS to help clearly describe the project’s deliverables and scope – the “what” of the project. To ensure buy-in, collect feedback from all team members when creating the WBS. It is not a description of a process or schedule that defines how or when the deliverables will be produced but rather is specifically limited to describing and detailing the project’s outcome or scope. The WBS overall goal is to subdivide the project into smaller, more manageable pieces of work, with each descending level representing increasingly detailed definition of the project work.

Key to WBS – 100% Rule – The WBS must include 100% of the work defined by the project scope and captures all deliverables – internal, external and interim – in terms of work to be completed. The WBS should NOT include any work that falls outside of the actual scope of the project, that is, it cannot include more than 100% of the work.

An annotated example of a WBS (“Construction of a Bicycle”) is provided as a reference.



RISK REGISTER TEMPLATE

Instructions – First step is for project team to brainstorm all possible project risks. After risks are captured, the team should go through each risk and assign probability of occurrence (1-10) and impact to project (1-10). The risks are then ranked from highest to lowest (probability x impact) and the team develops strategies for dealing with the highest ranked risks (avoid, transfer, mitigate or accept).

 Risk Matrix			
Risk	Impact	Probability	Significance
Trigger Leak	10.0	9.0	90.0
Delay in Bottle Manufacturer Selection	9.0	9.0	81.0
Failed Plant Trial	10.0	8.0	80.0
Final internal decision - trigger	9.0	7.0	63.0
Delay in bottle design (3)	9.0	6.0	54.0
Stakeholder buy-in	8.0	6.0	48.0
Fluctuation in COGS	5.0	8.0	40.0
SME risk	8.0	4.0	32.0
Bottle leak	10.0	3.0	30.0
Delay in Dfe approval	4.0	5.0	20.0
Stability failure (material compatibility)	10.0	2.0	20.0
Delay in Artwork	3.0	6.0	18.0
Smooth hand off	6.0	3.0	18.0
Failure to qualify bottle manufacturer	8.0	2.0	16.0
Failure to qualify filler	8.0	2.0	16.0
No agreement in forecast	2.0	5.0	10.0

PROJECT STATUS REPORT TEMPLATE

Instructions – Use this template to report topline status of each project you are managing. It is a summary report for the executive level.

 EXECUTIVE SUMMARY					
PROJECT XYZ					
Report Period	Project Manager	Executive Sponsor	Target Timing		
November 2016	Dusan Racic	Patricia Olsen	Sell-in - May 2016 RTS - 11/21/16		
ACCOMPLISHMENTS THIS PERIOD:		ISSUE/ CHANGES:			
PLANNED ACCOMPLISHMENTS NEXT PERIOD:		ADDITIONAL NOTES OR COMMENTS:			
*None					
CONDITION: ■ Green (On Target) ■ Yellow ■ Red (Decision Needed) TREND: ▲ Improving ▶ No Change ▼ Getting Worse					
1					

PROJECT LESSONS LEARNED LOG

Instructions – Use this log to capture all significant learnings throughout the project. Post this somewhere where all team members have access and frequently remind team to log their learning. This will greatly assist in the execution of project debrief.

[illegible]

LESSONS LEARNED CHECKLIST - DEBRIEF

Instructions – Provide this checklist (remove/add items as appropriate for project) for team members to complete prior to project debrief. Compile from all members and identify areas that had the biggest negative and positive impact on the project. Meet with team and generate high impact improvement strategies.



Project Name _____

LESSONS LEARNED CHECKLIST

Project Name:	
Prepared by:	

Instructions - Read through each item on the checklist and answer YES or NO as it relates to Project Walker. Then select the level of impact that each item had on the project.

1. Project Lessons-Learned Checklist

No.	Lesson Learned	Yes	No	N/A	Impact					
					Low		High			
					1	2	3	4	5	
<i>Place your cursor in the appropriate boxes and type an X.</i>										
Project Planning										
1.	Business Objectives were specific, measurable, attainable, results-focused and time-limited.									
2.	Product concept was appropriate to Business Objectives.									
3.	Project Plan and Schedule were well-documented, with appropriate structure and detail.									
4.	Project Schedule encompassed all aspects of the project.									
5.	Tasks were defined adequately.									
6.	Stakeholders (e.g., Sponsor, Customer) had appropriate input into the project planning process.									
7.	Requirements were gathered to sufficient detail.									
8.	Requirements were documented clearly.									
9.	Specifications were clear and well-documented.									
10.	Test Plan was adequate, understandable, and well-documented.									
11.	External dependencies were identified, agreements signed									
12.	Forecast process was effective (cross functional alignment)									
13.	Transition to commercialization was well executed									
14.	Project Plan had buy-in from the stakeholders.									
15.	Stakeholders had easy access to Project Plan and Schedule.									
Project Execution and Delivery										

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