

## Project Management Methodology Step-By-Step

This document outlines a series of activities that will guide you through managing a project using the Project Management Methodology

<b>Initiation Phase</b>					
<i>Project Idea → Project Definition → Charter Approval</i>					
	<b>Project Activity</b>	<b>Notes</b>	<b>Deliverable</b>	<b>Tool/Template</b>	<b>Project Management Office (PMO) Actions</b>
I1	Initiate the Project (Project Proposal)	<p>The objective of the Project Proposal is to provide management with the information necessary to determine if the initiative has merit. Projects can be initiated in the following ways:</p> <ol style="list-style-type: none"> <li>1. For CIO Projects – any member of CCS may submit a Proposal for an initiative. Proposals are reviewed and approved by the CIO and CCS Management.</li> <li>2. For ISSC Projects – Carleton business units submit Proposals to the Chair of ISSC (Information Systems Steering Committee). This takes place as part of the annual budgeting process and makes up the portfolio of projects for the fiscal year. ISSC reviews the Proposals for prioritization, ranking, and approval to submit a Project Charter.</li> </ol>	<ul style="list-style-type: none"> <li>- Project Proposal</li> <li>- Approval to proceed with defining the project</li> <li>- Project Sponsor identified</li> <li>- Project Managers assigned</li> </ul>	<ul style="list-style-type: none"> <li>- Project Proposal Template</li> <li>- What is a Project?</li> <li>- What is a ProjectLite?</li> <li>- Budget Estimation Worksheet</li> </ul>	<ul style="list-style-type: none"> <li>- Review Proposal for completeness</li> <li>- Add Proposal information to Eclipse</li> <li>- Arrange Prioritization/Ranking Meeting</li> <li>- File Proposal in Project Repository</li> <li>- Link approved Proposal to Eclipse</li> </ul>
I2	Define the Project (Project Charter)	<ul style="list-style-type: none"> <li>- Refer to the guidelines outlined in <i>Italics</i> in the Project Charter template.</li> <li>- Review Lessons Learned and other historical data from similar projects.</li> <li>- Solicit input from key Stakeholders including departmental Subject Matter Experts (SMEs).</li> <li>- Charter approval date is the “Start Date” of a project.</li> </ul>	Project Charter	<ul style="list-style-type: none"> <li>- Project Charter template</li> <li>- Lessons Learned</li> <li>- Budget Estimation Worksheet</li> <li>- Project Team Roles Definition</li> <li>- Standards &amp; Guidelines: Project Risks</li> </ul>	

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I3	Hold Charter Review Meeting	The objective of the Charter Review is to encourage debate, to assess impact and interdependencies on other departments, and to make a judgment on the technical/business merit of a project before it is approved. - Project Manager invites CCS Management team and applicable staff, and presents Project Charter, records questions, and addresses concerns.	Charter Review Meeting	Charter Review Checklist	
I4	Submit Project Charter to Project Management Office	- Manager, PMO will determine appropriate Charter approval level – CIO (Chief Information Officer) or ISSC (Information Systems Steering Committee). - PMO will then assign a project number and make arrangements for the Project Charter approval meeting.			- Assign Project # - Obtain Charter approval - File Charter in Project Repository
I5	Obtain Project Charter approval and Secure Funding	To obtain Project Charter approval, the Manager of the PMO will either hold a Charter approval meeting with the CIO, or the Charter will be presented at the next ISSC meeting (by the Charter Author(s) on date advised by ISSC Secretary).	- Project Charter approval - Funding transfer to PMO Organization		- Complete PMO section in Charter - create project in FAST and transfer budget allocation - Update Eclipse - File documents in Project Repository - Link approved Project Charter to Eclipse
<b>→ Trigger to “Planning” Phase: Project Charter Approval</b>					

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<b>Planning Phase</b> <i>Identify who does what work and when</i>					
	<b>Project Activity</b>	<b>Notes</b>	<b>Deliverable</b>	<b>Tool/Template</b>	<b>Project Management Office (PMO) Actions</b>
P1	Develop Detailed Project Management Plan	The Project Management Plan (PMP) is the controlling document that articulates how the project will be executed, and is used as a baseline against which to monitor project progress, cost and schedule. Depending on the size and complexity of the project, the Plan could be a single document, or it could be a collection of documents consisting of more comprehensive management plans for some of the other activities in the Planning Phase.	Project Management Plan (PMP)	<ul style="list-style-type: none"> <li>- Project Management Plan Template</li> <li>- Project Test Plan Template (for Quality Management Plan section)</li> <li>- Project Team Roles Definition</li> </ul>	
P2	Develop Work Breakdown Structure (WBS)	The WBS is a <u>deliverable-oriented</u> grouping of project elements which organizes and defines the total scope of the project. It subdivides the project work into smaller, more manageable pieces, with each descending level representing an increasingly detailed definition of the project work.  Include the WBS as an Appendix to the PMP and use it as the starting point for the project Schedule.	Work Breakdown Structure (WBS)	Project WBS Template	
P3	Develop Project Schedule	From the WBS, and working with project team leads and SMEs, identify the tasks associated with each deliverable, assign start and end dates and resources.	Project Schedule	MS Project Template, Excel Template, or Schedule in Eclipse	

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P4	Develop Quality Management Plan	The Quality Management Plan describes how the project will implement quality assurance and control; and defines the processes that will be taken to prevent and remove defects. It also outlines measurement and tracking mechanisms, test matrices and plans, configuration management strategy, and standards and procedures.	Project Quality Management Plan	- Quality Management Plan - Project Test Plan Template	
P5	Develop Communication Plan	Ensure your Communication Plan includes <u>all</u> parties impacted by the project, and that the information conveyed is relevant to each particular audience. Refer to the Template for instructions.	Project Communication Plan	Project Communication Plan Template	
P6	Obtain Project Management Plan Approval	Review completed PMP with the Sponsor, key Stakeholders and departmental SMEs. If the Project Charter asked for <u>Approval to Plan</u> , then submit to PMO and request to present it to ISSC or CIO for approval.	Project Management Plan approved		- Update Schedule and cost baselines in Eclipse - File in Project Repository - Link PMP to Eclipse
P7	Acquire New Resources	<u>Internal Job Posting (term):</u> - Create Job Description and submit request to HR. - Contact PMO for funding FOAPAL; and Department Administrator for office space. - Conduct interviews and hire appropriate candidate. <u>External Professional Services:</u> - Work with Purchasing to create contracts for consulting and submit to PMO.	- Job Description - Contract with Statement of Work (SOW)	Professional Services Agreement	Liaise with Purchasing to create and deliver Purchase Order to vendor
<b>→ Trigger to “Execution &amp; Control” Phase: Project Plan Approval</b>					

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<b>Execution &amp; Control Phase</b>					
<i>Carry out the Project Plan, track progress, communicate, and report project status</i>					
	<b>Project Activity</b>	<b>Notes</b>	<b>Deliverable</b>	<b>Tool/Template</b>	<b>Project Management Office (PMO) Actions</b>
E1	Conduct Kick-off Meeting	The Kick-off meeting lays out the mode of operations for the Execution Phase of the project and allows project team members to gain a clear understanding of the objectives, commitments, and their roles in meeting the objectives. Review the project Schedule and deliverables, what is in-scope and out-of-scope, establish frequency of project team meetings and other logistics as identified in the Kick-off Meeting Checklist.		- Kick-off Meeting Checklist	
E2	Purchase Project Supplies	Submit all procurement paperwork to the PMO for processing. Refer to Project Budget Procedures (located in Tools and Templates/Tools on the PMO website), and to the Carleton University Purchasing Policy		- Purchase Requisition	Process and file procurement paperwork
E3	Monitor and Control Project	<ul style="list-style-type: none"> <li>- <u>Issues &amp; Risks</u>: Review open issues and risks at project status meetings and update them regularly in Eclipse.</li> <li>- <u>Project Schedule</u>: Manage and take corrective action as necessary to keep project on track.</li> <li>- <u>Project Spending</u>: Ensure costs are kept within the bounds of the budget established in the PMP. Track funds spent and committed.</li> <li>- <u>External Contracts</u>: Monitor progress and deliverables in accordance with the Statement of Work (SOW).</li> </ul>		<ul style="list-style-type: none"> <li>- Project Management Plan: Issue Management and Risk Management Sections</li> <li>- Professional Services Agreement</li> </ul>	<ul style="list-style-type: none"> <li>- Report on budget status</li> <li>- Update Eclipse with month end budget metrics</li> <li>- Process payment of invoices</li> </ul>

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	<b>Project Activity</b>	<b>Notes</b>	<b>Deliverable</b>	<b>Tool/Template</b>	<b>Project Management Office (PMO) Actions</b>
E4	Report on Project Performance	<ul style="list-style-type: none"> <li>- Update Eclipse with Monthly Status Reports based on input from the project team, including issues and risks.</li> <li>- Send progress reports to key Stakeholders.</li> </ul>	Monthly Status Report	<ul style="list-style-type: none"> <li>- Project Communication Plan Template</li> <li>- Eclipse</li> </ul>	<ul style="list-style-type: none"> <li>- Provide monthly summary reports of all projects at CCS Operational Reviews and ISSC meetings</li> </ul>
E5	Request, Track and Control Change Requests	<p>The objective of the Project Change Control Procedure is to have a consistent method of identifying and requesting changes to the <b>project scope</b> established in the Project Charter, to assess the benefit of those changes, and to determine the impact on the execution of the project. The Project Change Request template provides a mechanism for approving changes and communicating them to project Stakeholders.</p> <p>When a Project Change Request is approved, update the PMP and communicate the information to the project team and Stakeholders.</p>	<ul style="list-style-type: none"> <li>- Project Change Request</li> <li>- Change Request approval decision by CIO or ISSC</li> <li>- Update Project Management Plan based on approved change</li> </ul>	Project Change Request Template	<ul style="list-style-type: none"> <li>- Update Project Change Log with submitted requests</li> <li>- File Change Requests</li> <li>- Allocate additional funding to the project if applicable</li> <li>- Update project metrics in Eclipse if applicable</li> <li>- Link approved Project Change Request to Eclipse</li> </ul>
E6	Monitor and Control Schedule and Budget	<p>The Project Manager is responsible for keeping the project schedule and budget within the bounds of the baseline established in the Project Management Plan.</p> <p>Take corrective action as necessary to keep project schedule and budget on track.</p>		<ul style="list-style-type: none"> <li>- Project Schedule</li> <li>- Budget Estimation Worksheet</li> </ul>	<ul style="list-style-type: none"> <li>- Track project funds spent /committed and report to ISSC and CIO</li> </ul>

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	Project Activity	Notes	Deliverable	Tool/Template	Project Management Office (PMO) Actions
E7	Provide Training and Hand Over to Support Personnel	Conduct training and hand over Procedures as identified in the Project Management Plan under the “Training & Support Plan” section.			
E8	Complete Project Work	<ul style="list-style-type: none"> <li>- Review the Go-Live Checklist and ensure that all actions have been completed.</li> <li>- If applicable, notify the Change Advisory Board (CAB) by submitting a Request for Change (RFC) to your Manager two weeks prior to going live.</li> <li>- Ensure all project Stakeholders have been notified.</li> <li>- Go live with delivered system, service or product.</li> <li>- Officially hand over maintenance &amp; support.</li> </ul>	Go-live	Go-Live Checklist	
<b>→ Trigger to “Closure” Phase: Go live with system, service, or product</b>					

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<b>Closure Phase</b> <i>Formally complete the project</i>					
	<b>Project Activity</b>	<b>Notes</b>	<b>Deliverable</b>	<b>Tool/Template</b>	<b>Project Management Office (PMO) Actions</b>
C1	Verify Project Completion	Ensure all components of the project have been completed and signed off.	Project Sponsor Sign-off		
C2	Hold Post-mortem Meeting	Invite all project Stakeholders and send a Project Post-mortem Questionnaire prior to the meeting. Review what went well, what could be improved and identify Lessons Learned. Discuss if success criteria defined in Project Charter were met and identify shortcomings.		Project Post-mortem Questionnaire	
C3	Close Project Contracts	Ensure all paperwork has been submitted to the PMO for processing.			<ul style="list-style-type: none"> <li>- Process all invoices</li> <li>- Close Purchase Orders</li> </ul>
C4	Complete all Project Administration (Project Final Report)	Complete Project Final Report, finalize all project documentation, and ensure the final versions of all key deliverables have been submitted to the PMO for archiving (Final Report Date is the “End Date” of the project). Send project status to project Stakeholders.	Project Final Report	Project Final Report Template	<ul style="list-style-type: none"> <li>- File project documents</li> <li>- Close project in Eclipse (project closure date is always at the end of the Month)</li> <li>- Link Final Report to Eclipse</li> </ul>
C5	Celebrate and Communicate Accomplishments	Organize some form of recognition, e.g.; event, gift, announcement to celebrate your Project team's hard work and overall success.		Project Communication Plan	
C6	Disband Project Resources	Provide feedback to team members' Managers on their work on the project. Disperse equipment and workspace.			
<b>→ Project Completion: All project deliverables completed and Project Sponsor sign-off</b>					